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mhealth Apps & Solutions Market By Connected Devices (Cardiac Monitoring, Diabetes Management Devices), Health Apps (Exercise, Weight Loss, Women's Health, Sleep and Meditation), Medical Apps (Medical Reference) – Global Trends & Forecast to 2018

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Abstracts

mHealth is a successful integration of mobile technology and healthcare services that entail a revolution in the global healthcare solutions market. The global mHealth market is estimated to be valued at $6.6 billion in 2013 and is expected to reach $20.7 billion by 2018 at a healthy CAGR of 25.5%.

The mobile healthcare market is broadly categorized into connected medical device and healthcare applications; the former dominates the revenue market with around 80% in 2013. The connected devices market is segmented into cardiac monitoring, diabetes management devices, multi-parameter tracker, and other devices like sleep apnea devices, and respiratory monitors. Connected cardiac monitoring devices contributed the maximum to this market, followed by diabetes management devices, and multi-parameter trackers. The highest growth will be witnessed by the diabetes management devices market during the forecast period, majorly due to the increasing global burden of diabetic population.

The healthcare applications market is classified into health apps and medical apps. Health apps are segmented into exercise, weight loss, womens health, sleep and meditation, medication reminder and other apps, whereas the medical apps market is segmented into medical reference, and other applications like apps for mental health, dermatological treatment, and emergency response. Despite the higher download

volume of healthcare applications, revenue contribution of apps is not significant since the majority of applications are free and paid apps cost between $1 and $2 each. The healthcare apps market is dominated by exercise apps with just less than one-fifth of the share. Sleep and meditation, and weight loss apps are expected to grow at the highest CAGR during the forecast period.

Analysis of market dynamics reveals that the major drivers of this market include increasing awareness of chronic diseases, growing adoption of smartphones, high penetration of 3G and 4G network, advanced mobile connectivity, and a promise of better healthcare cost-efficiency. On the other hand, stringent regulations by the FDA and the EU, and data insecurity hinder market growth. Low patient-doctor ratio in underdeveloped countries such as Africa and other potential mHealth platforms such as smart TV increase the scope of mHealth penetration globally.

The trend of venture capital investment presents a significant development in the mobile platform for healthcare solutions and data security. In 2012, monitoring segment, healthcare IT, and consumer apps fetched the maximum venture capitals. Benchmarking strategy analysis reveals market preference towards providing comprehensive solutions with an integrated platform. The connected device market is also expected to amalgamate with companion apps to offer better healthcare solutions.

North America holds the largest share of the global mHealth market in 2013. It is estimated to be valued at $2.9 billion in 2013, while Europe and Asia will witness potential growth due to significant adoption of mobile health technology and government initiatives. U.K. India, China, Japan, Africa, and Australia are the major contributors amongst all emerging countries in 2013.

The mHealth market is highly fragmented and enriched with many healthcare as well as non-healthcare players. Philips (The Netherlands), Medtronic (U.S.), Nike (U.S.), Omron (Japan), and Alere (U.S.) contribute significantly to the global mHealth market with the technical integration of mobile network providers such as AT&T (U.S.), Qualcomm (U.S.), Cerner (U.S.), and Diversinet (Canada).

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