2013 Healthcare Benchmarks

Mobile Health

Note: This is an authorized excerpt from *2013 Healthcare Benchmarks: Mobile Health.*
To download the entire report, go to http://store.hin.com/product.asp?itemid=4586 or call 888-446-3530.

Healthcare Intelligence Network
800 State Highway 71, Suite 2
Sea Girt, NJ 08750

2013 Healthcare Benchmarks: Mobile Health

presented by the
Healthcare Intelligence Network

A publication of:
The Healthcare Intelligence Network
800 State Highway 71, Suite 2
Sea Girt, NJ 08736
Phone: (732) 449-4468
Fax: (732) 449-4463
http://www.hin.com

© 2013, Healthcare Intelligence Network — http://www.hin.com

2013 Healthcare Benchmarks: Mobile Health

149 healthcare organizations on the forefront of mobile health adoption describe how they're using mHealth applications, from the most popular technologies in use to the populations and conditions they serve, the challenges of mHealth implementation, the impact they're already seeing, and more.

"The mHealth platform supports the patient in-between visits or encounters to adhere to the prescribed plans and actionable tasks."
> Patient activation and engagement technology

"[We use mHealth] as a marketing tool for a wellness initiative, health awareness and opportunity for employees to track biometric results."
> Employer

"We are overcoming [mHealth] challenges by spending more time with our providers and understanding their point of view, the act of providing care and maintaining a patient-centric focus."
> Academic medical center

"Our total health management site is Web-based and can be accessed on smartphones."
> Total health management company

2013 Healthcare Benchmarks: Mobile Health

This special report is based on results from the Healthcare Intelligence Network's fourth annual Health Coaching e-survey administered in January 2013.

Executive Editor

Melanie Matthews

HIN executive vice president and chief operating officer

Project Editors

Patricia Donovan

Jessica Fornarotto

Document Design

Jane Salmon

© 2013, Healthcare Intelligence Network — http://www.hin.com

Table of Contents

About the Healthcare Intelligence Network **6**

Executive Summary **6**

Survey Highlights 7

Key Findings **7**

Program Components 7

Results, Reimbursement and ROI 7

Mobile Health Successes 8

Methodology **9**

Respondent Demographics **9**

Using This Report **10**

Responses by Sector **11**

The Service Provider Perspective 15

The Employer Perspective 15

The Hospital/Health System Perspective 16

Respondents in Their Own Words **16**

Overcoming the Challenges of mHealth Implementation 16

Most Successful mHealth Initiative 17

Planned mHealth Programs 19

Conclusion **21**

Responses to Questions **21**

Figure 1: All - Using Mobile Technologies 22

Figure 2: All - Will Launch mHealth in Next 12 Months 22

Figure 3: All - mHealth Technologies in Use 23

Figure 4: All - mHealth Uses 23

Figure 5: All - Percentage of Population Engaged in mHealth 24

Figure 6: All - Targeted Populations 24

Figure 7: All - Targeted Conditions 25

Figure 8: All - Reduction in Healthcare Utilization 25

Figure 9: All - Greatest Challenge of mHealth Adoption 26

Figure 10: All - mHealth-Related Improvements 26

Figure 11: All - Organization Type 27

Figure 12: Service Provider - Using Mobile Technologies 27

Figure 13: Service Provider - Will Launch mHealth in Next 12 Months 28

Figure 14: Service Provider - mHealth Technologies in Use 28

Figure 15: Service Provider - mHealth Uses 29

Figure 16: Service Provider - Percentage of Population Engaged in mHealth 29

Figure 17: Service Provider - Targeted Populations 30

Figure 18: Service Provider - Targeted Conditions 30

Figure 19: Service Provider - Reduction in Healthcare Utilization 31

Figure 20: Service Provider - Greatest Challenge of mHealth Adoption 31

Figure 21: Service Provider - mHealth-Related Improvements 32

Figure 22: Employer - Using Mobile Technologies 32

Figure 23: Employer - Will Launch mHealth in Next 12 Months 33

© 2013, Healthcare Intelligence Network — http://www.hin.com

Figure 24: Employer - mHealth Technologies in Use 33
Figure 25: Employer - mHealth Uses 34
Figure 26: Employer - Percentage of Population Engaged in mHealth 34
Figure 27: Employer - Targeted Populations 35
Figure 28: Employer - Targeted Conditions 35
Figure 29: Employer - Reduction in Healthcare Utilization 36
Figure 30: Employer - Greatest Challenge of mHealth Adoption 36
Figure 31: Employer - mHealth-Related Improvements 37
Figure 32: Hospital - Using Mobile Technologies 37
Figure 33: Hospital - Will Launch mHealth in Next 12 Months 38
Figure 34: Hospital - mHealth Technologies in Use 38
Figure 36: Hospital - mHealth Uses 39
Figure 37: Hospital - Percentage of Population Engaged in mHealth 39
Figure 38: Hospital - Targeted Populations 40
Figure 39: Hospital - Targeted Conditions 40
Figure 40: Hospital - Reduction in Healthcare Utilization 41
Figure 41: Hospital - Greatest Challenge of mHealth Adoption 42
Figure 42: Hospital - mHealth-Related Improvements 43
Figure 43: Related: Technologies to Promote Medication Adherence 43
Figure 44: Related: Modalities for Health Coaching Delivery 44
Figure 45: Related: Technologies Supporting Population Health Management 44
Appendix A: 2013 Mobile Health Survey Tool 45

About the Healthcare Intelligence Network

The Healthcare Intelligence Network (HIN) is an electronic publishing company providing high-quality information on the business of healthcare. In one place, healthcare executives can receive exclusive, customized up-to-the-minute information in five key areas: the healthcare and managed care industry, hospital and health system management, health law and regulation, behavioral healthcare and long-term care.

Executive Summary

It seems as though there's an app for everything but the common cold.

The emergence and use of mobile health (mHealth) technologies have transformed the exchange of healthcare data, with mobile apps monitoring everything from blood sugar to medication adherence, and text-based reminders urging smokers not to give into that craving. Some studies predict that mHealth technologies can save from $1.96 billion to $5.83 billion in healthcare costs by the year 2014, and that as many as 500 million smartphone users worldwide will use a healthcare app by 2015.

In its first mHealth e-survey conducted in March 2013, the Healthcare Intelligence Network (HIN) captured current trends in emerging mHealth technologies. Nearly 150 healthcare organizations described which technologies they were using, what conditions and populations they were targeting, and the challenges and successes they encountered along the way.

While smartphone apps emerged as the most widely used technology, according to 58 percent of respondents, text messaging was used by nearly half of those surveyed (47 percent), mobile Web applications used by 42 percent of respondents, and apps for tablets used by 27 percent. Health/disease management was the most frequently cited use for mobile technology, according to 65 percent of respondents, with wellness and prevention efforts coming in a close second at 64 percent. Capturing real-time health data was the main reason for use for nearly half of those surveyed.

Just over 45% of survey respondents have adopted mHealth.

Using This Report

This benchmarking report is intended as a resource for healthcare organizations searching for comparable data and means to measure implementation and progress. It is also a helpful planning tool for organizations readying initiatives in this area.

The initial charts and graphs presented represent results from all respondents; images in subsequent sections depict data from high-responding sectors. (Figure titles begin with the segment they represent; for example, All, Health Plans, Hospitals, etc.)

Often, one of the largest responding sectors is composed of respondents identifying their organization type as "Other." In general, we do not depict results from this segment because it represents a wide range of organization types, including consultants and product vendors. However, you will always find a graph indicating the demographics of respondents.

Here are some additional tips for using this report:

- ✓ See how you measure up: Scan this report for your sector, and see how your program compares to others. Note where you are leading and where you are behind.
- ✓ Evaluate your efforts: Think about where you have been focusing your efforts in this area. Look for trends in the data in this report. Look for benchmarks set by your sector and others.
- ✓ Set new goals: Use the data in this report to set new goals for your organization, or to raise the bar on existing efforts.
- ✓ Use it as a reference book: Keep this report accessible so you can refer to it in your work. Use these data to support your efforts in this area.

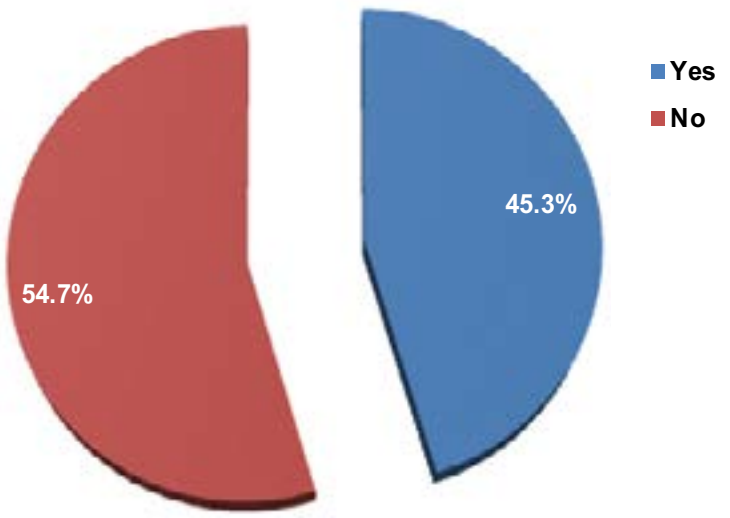
If you have questions about the data in this report, or have feedback for our team, don't hesitate to contact us at info@hin.com or 732-449-4468.

Almost two-thirds—65%—use mHealth to promote health and disease management.

© 2013, Healthcare Intelligence Network — http://www.hin.com

Figure 1: All - Using Mobile Technologies

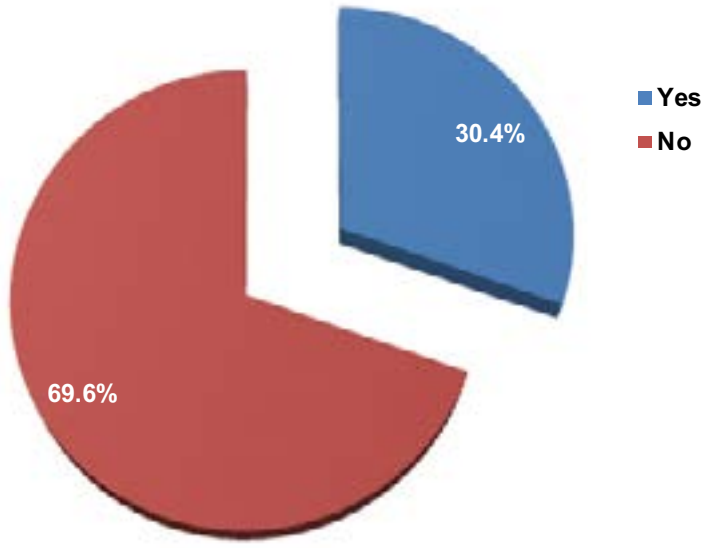
Does your organization use mobile technologies for health and wellness monitoring?



HIN Mobile Health Survey
February, 2013

Figure 2: All - Will Launch mHealth in Next 12 Months

Do you plan to start using mHealth within the next 12 months?



HIN Mobile Health Survey
February, 2013