Availability and profile of consumer mHealth apps

Health and wellness apps available through the iOS platform has more than doubled in the past two years

Today, more than two-thirds of Americans own smartphones and almost 20% depend solely upon their smartphone for internet access. Consequently, the number of mobile apps has increased to meet the demand and opportunity presented by smartphone proliferation of the mobile market. The increase in the number of healthcare apps, otherwise referred to as mHealth apps, available to consumers has grown at an even greater rate given the increased push for patients to become more actively engaged in their own healthcare management.

The term mHealth, used throughout this report, is defined as “medical and public health practice supported by mobile devices such as mobile phones, patient monitoring devices, personal digital assistants (PDAs), and other wireless devices.” The use of mobile apps in improving healthcare outcomes is of continued interest across industry stakeholders from patients and healthcare providers to healthcare systems and payers.

To better understand the current landscape of use, availability, evidence and barriers to mainstream adoption, a comprehensive follow-up study has been completed to the one performed in 2013 on mHealth apps that are publicly available to consumers and categorized as health, fitness or medical. In comparing the number of mHealth apps available on the iOS platform, the number of health and wellness apps increased over 100% from 2013 to 2015 (Exhibit 1).

Exhibit 1: Comparison of iOS mHealth Apps 2013 and 2015

Source: Mevvy, June 2015; IMS Health, AppScript, June 2015; IMS Institute for Healthcare Informatics, August 2015
In the 2015 study, over 165,000 healthcare consumer qualified apps were selected for review from both the Apple iOS and Google app platforms. Through review and selection criteria, to include prioritization of the most downloaded apps, 26,864 were selected as representative of the most widely used mHealth apps by consumers.

Across the patient journey, mHealth apps can be divided into two main categories: those which facilitate overall wellness such as exercise and diet, and those which specifically focus on disease management through implementation of treatment protocols such as medication reminders.

Consumer mHealth apps targeting wellness comprise two-thirds of the mHealth app space. This includes fitness, lifestyle & stress and diet & nutrition. Disease and treatment management comprises approximately a quarter of mHealth apps (Exhibit 2), with only a small share being specific to a particular disease.

Exhibit 2: mHealth Apps by Category 2015

Source: Mevvy, June 2015; IMS Health, AppScript, June 2015; IMS Institute for Healthcare Informatics, August 2015
Devices and wearables are meant to integrate with daily functions making data collection convenient, automatic and seamless. At this time, over half of wearables are designed for use on the wrist, another 23% designed to be worn around the chest and 17% are designed to be worn either on the purse, pocket or shoe (Exhibit 15). Nearly 90% of devices sync wirelessly with an app to automatically collect and provide access to data for reporting and analysis. There are a growing number of wearables being developed to connect to the ear, a body part which is unobtrusive and can collect sensory information on real-time heart rate, blood pressure, respiration rate, oxygen saturation and steps taken.\textsuperscript{11}

**Exhibit 15: Location of Wearable App Use**

![Wearable App Use Location Diagram](image-url)

Source: IMS Health, AppScript, July 2015; IMS Institute for Healthcare Informatics, August 2015