Review of China Mobile Health Market and Outlook for Future

移动
产业研究

深度
媒介传播

无线
广告监测

门户
艾媒网

政府
决策参考

iiMedia Research, a world famous third-party data mining and integrated marketing agency in the mobile internet, started to use the brand 'iiMedia' in 2007. iiMedia Research is China's first authoritative agency in the mobile internet, smart phone and E-commerce. After 2012, iiMedia Research officially became a member of CAMIR.

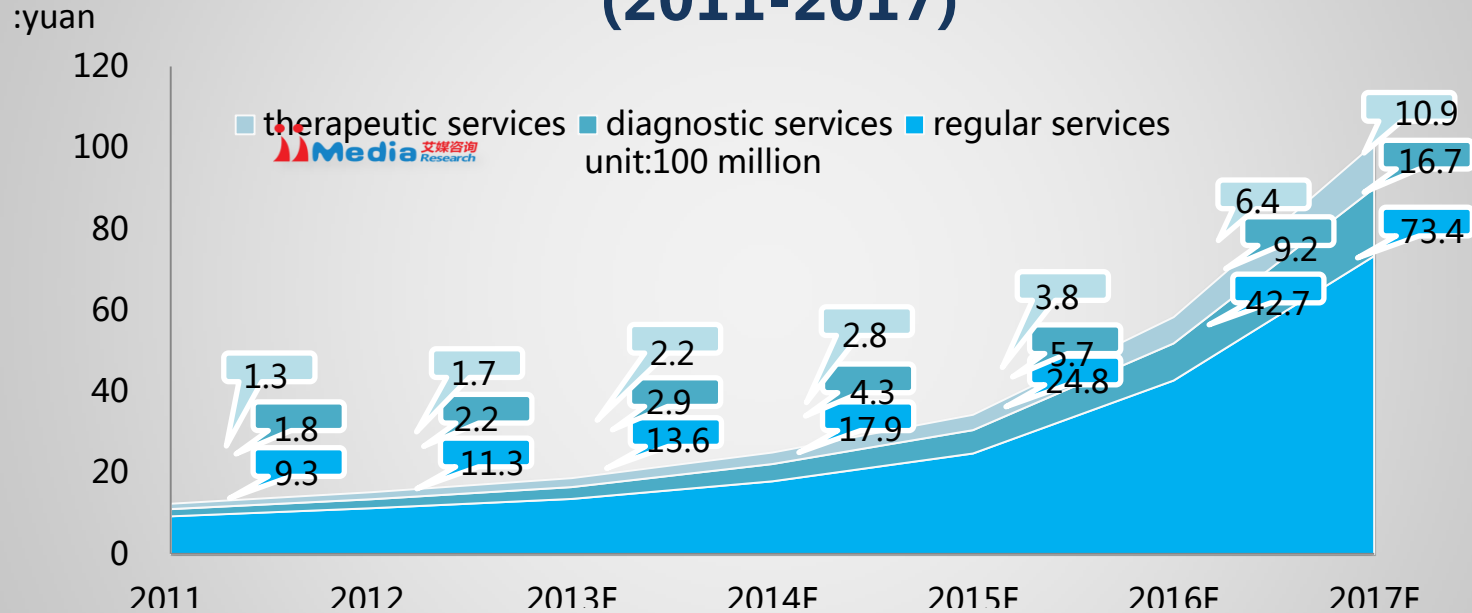# Market Size of China Mobile Health (2011-2017)
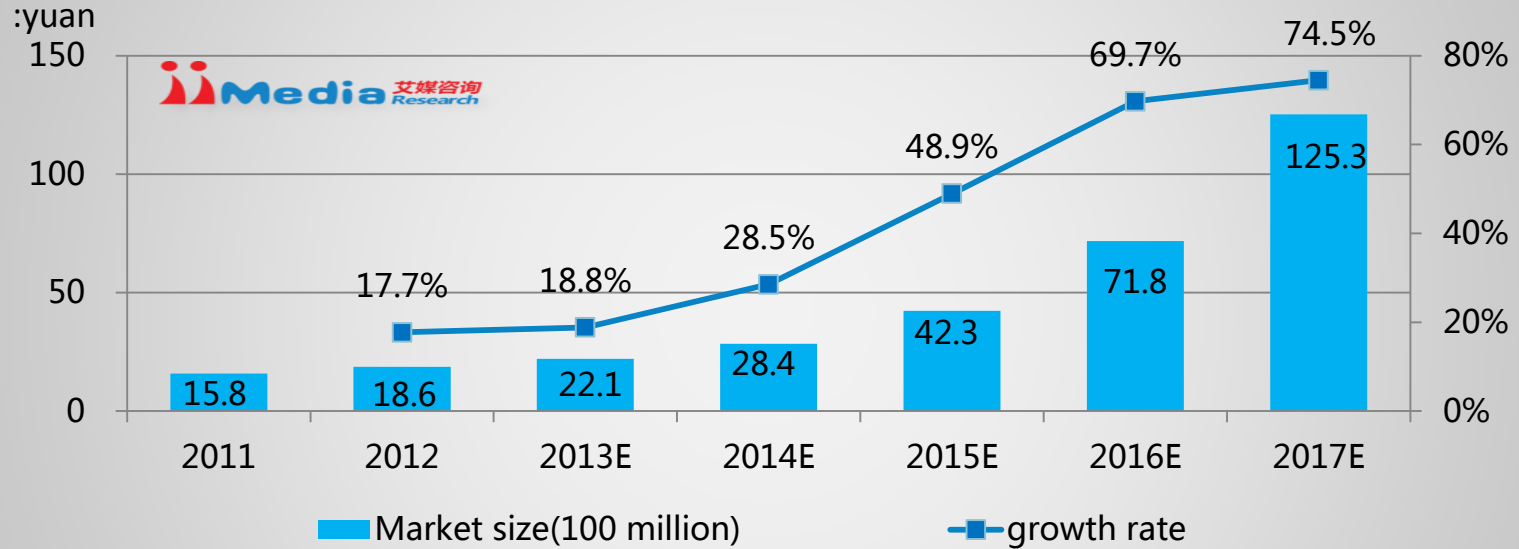
By the end of 2017, the market size of China mobile health will cross **10 billion** and achieve **12.53 billion**.

Market size of China wearable portable mobile health equipment's (2012-2017)
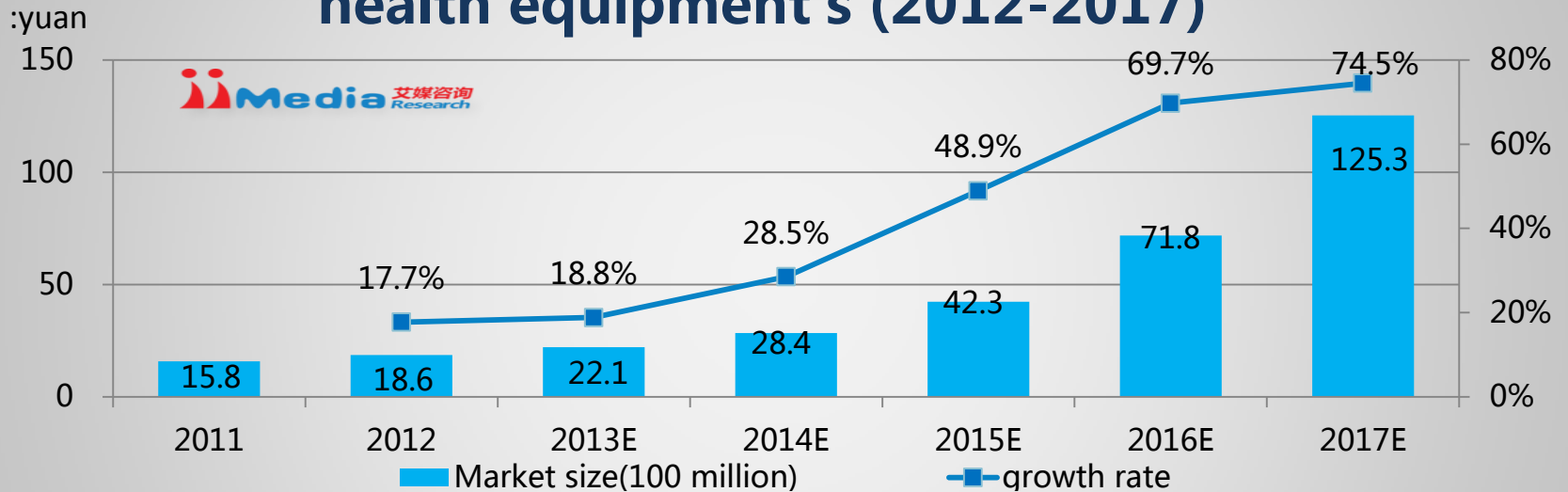
The market size of China wearable portable mobile health equipments achieved **420 million** in 2012.

Main areas' market size of China mobile health (2011-2017)

:yuan

therapeutic services diagnostic services regular services
unit:100 million

Year	therapeutic	diagnostic	regular
2011	1.3	1.8	9.3
2012	1.7	2.2	11.3
2013F	2.2	2.9	13.6
2014F	2.8	4.3	17.9
2015F	3.8	5.7	24.8
2016F	6.4	9.2	42.7
2017F	10.9	16.7	73.4

The market size of mobile health regular services will achieve **7.34 billion** by 2017.

Industrial suppliers of China mobile health (2012-2013)

Telecom operators
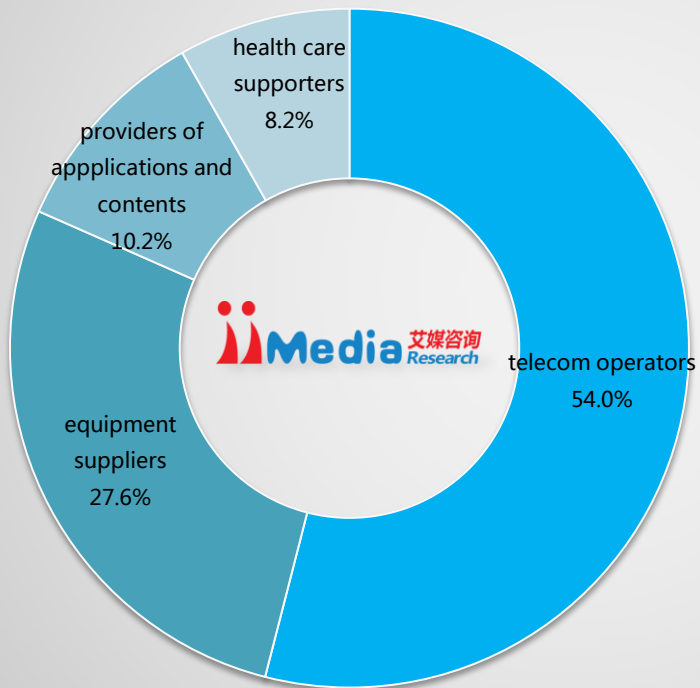
Medical apparatus and instruments makers

Hospitals

System integrators

Internet companies

Health care companies

Mobile Health

Market share projection of each main participant in China mobile health market(the next 5 years)

- telecom operators 54.0%
- equipment suppliers 27.6%
- providers of appplications and contents 10.2%
- health care supporters 8.2%

Mobile health applications for hospitals (2012-2013)

Unwired, Convenient, Personalized, Sharing, Intelligent and Perceptual.

Application products of China mobile health (2012)

Currently, there are more than 2000 kinds of health application products which still faced so many problems:

✚ The activation of most mobile health application products is not high.

✚ The lack of medical compound personnel leads to restriction of products development. However, it would go a long way toward obtaining doctors' resources.

Application products of China mobile health (2012)

Classification of mobile health applications:

➕ E-business clients of medicine products

➕ Clients for professionals of doctors and medical students

➕ Clients for health care information and cloud services

➕ Segment products of ophthalmology and dentistry

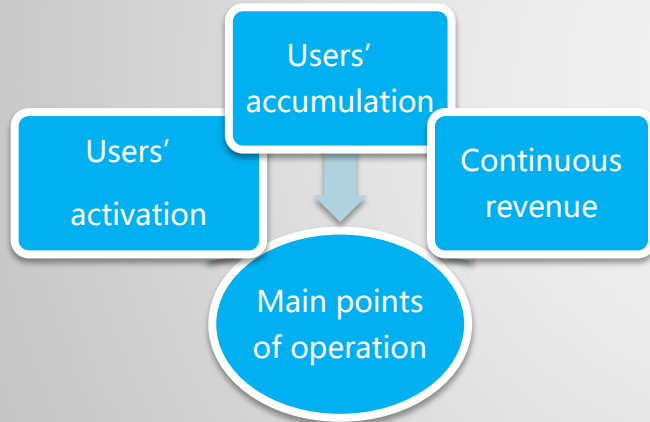➕ Segment functional products

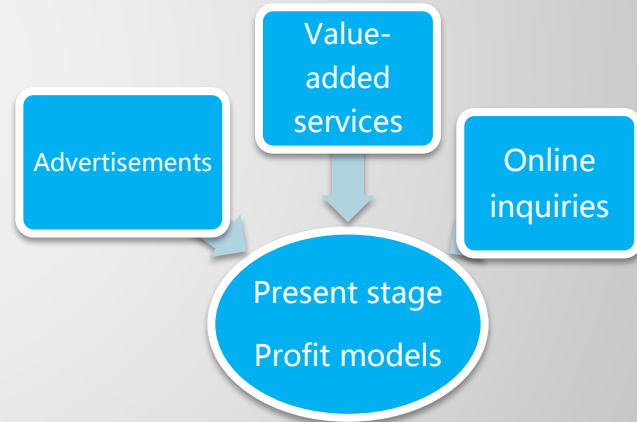**Development focus**

Application products of China mobile health (2012)

Status of operation and profit of China mobile health application products (2012)

Domestic mobile health was in a fledging period.

Users' accumulation

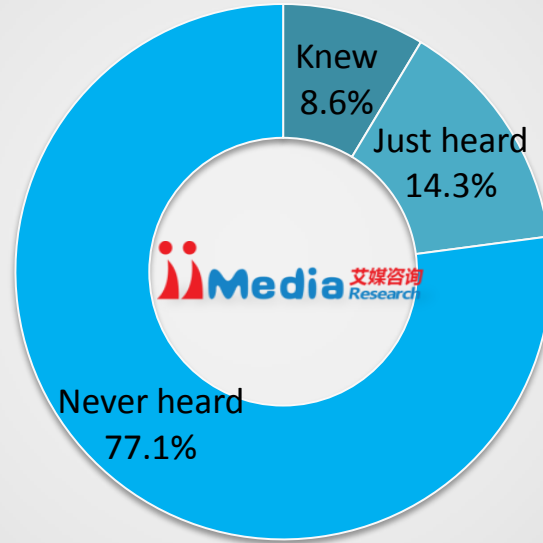Users' activation

Continuous revenue

Main points of operation

Key point：collection and utilization of data

Value-added services

Advertisements

Online inquiries

Present stage Profit models

Key point：lay a solid foundation first and then cash in

Mobile health recognition status of China mobile users (2012)

Knew
8.6%

Just heard
14.3%

Never heard
77.1%

Only **8.6%** knew mobile health but **77.1%** even never heard about it.

Mobile health applications installment research of China mobile users (2012)

Be not willing to try 8.5%

Have installed 2.9%

Be willing to try 88.6%
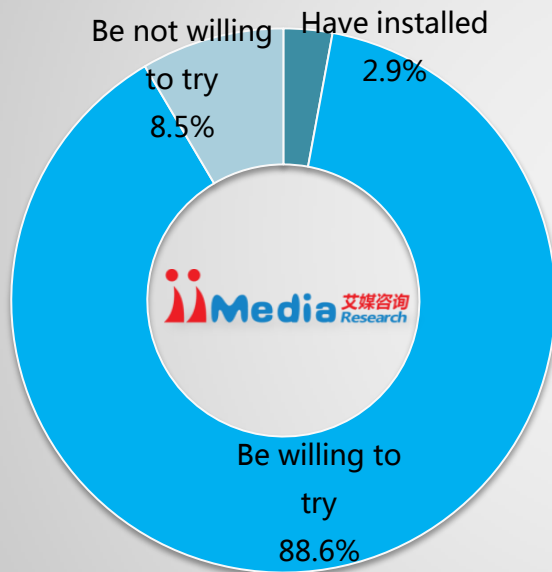
Only **2.9%** of users have installed and have used mobile health applications but **88.6%** express they are willing to have a try.

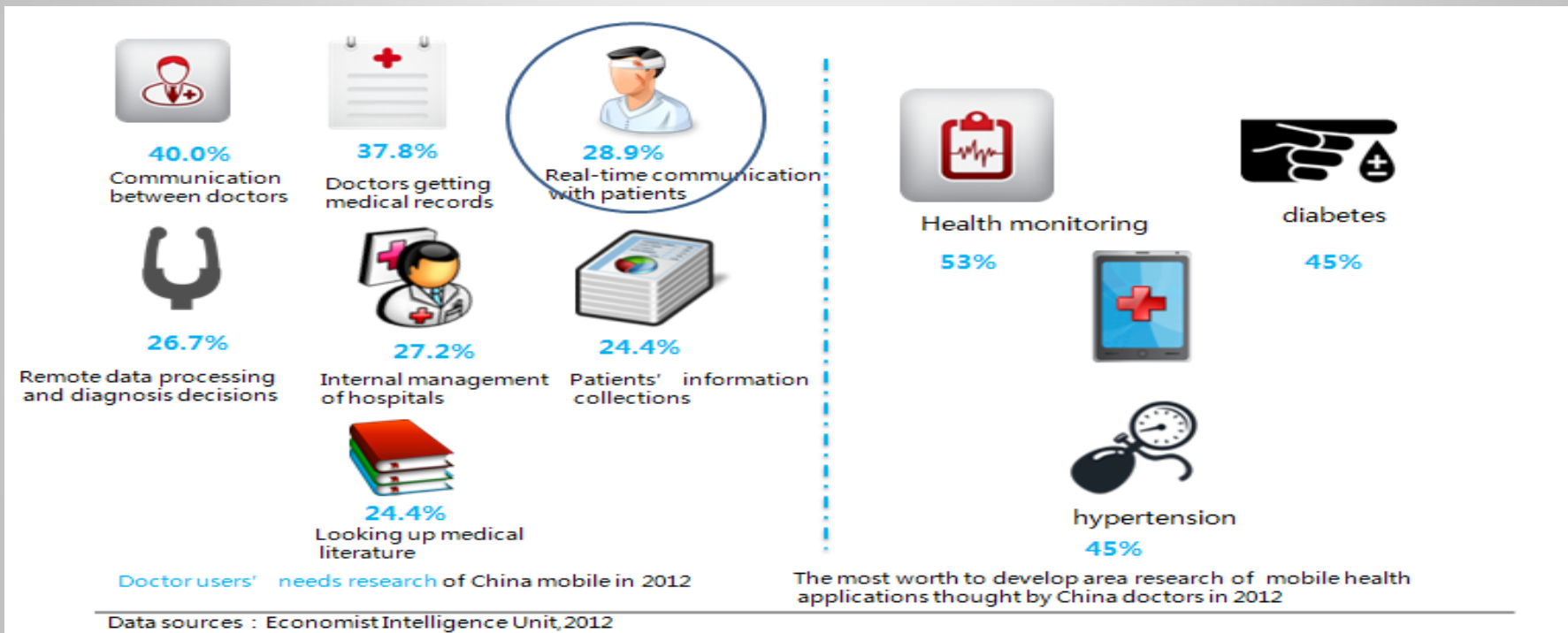# General users' expected functions of China mobile health applications (2012)
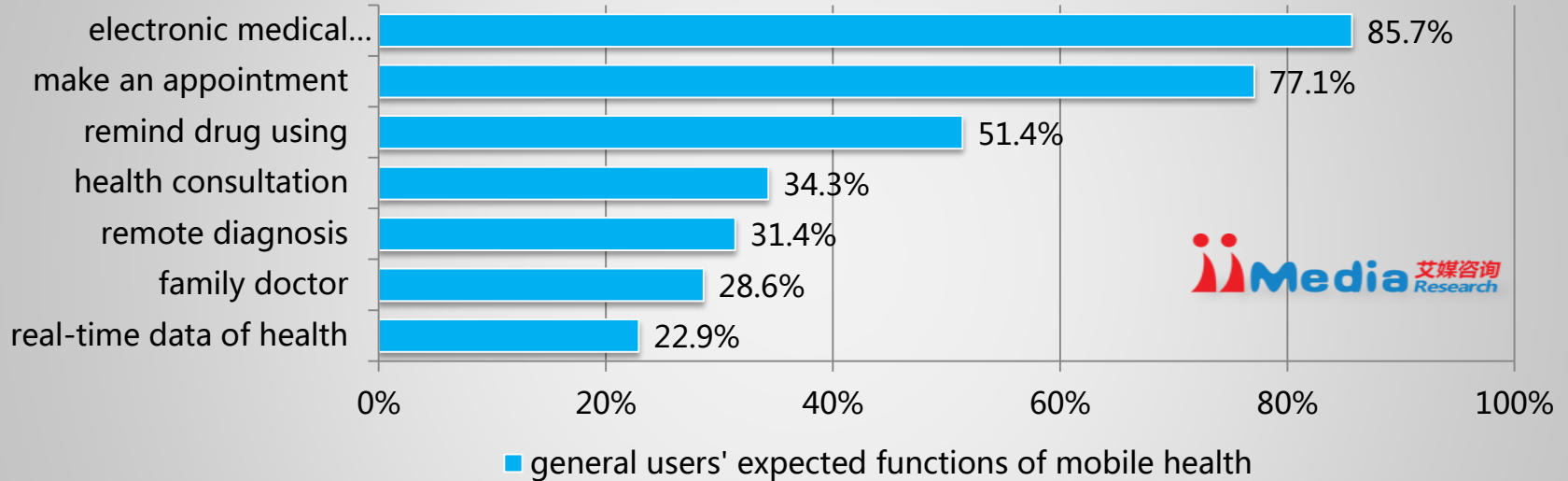
85.7% of China mobile phone users expected to realize the function of electronic medical records, 77.1% hoped can make an appointment and 51.4% chose remind drug using .

General consumers' concerned factors of China mobile health applications (2012)
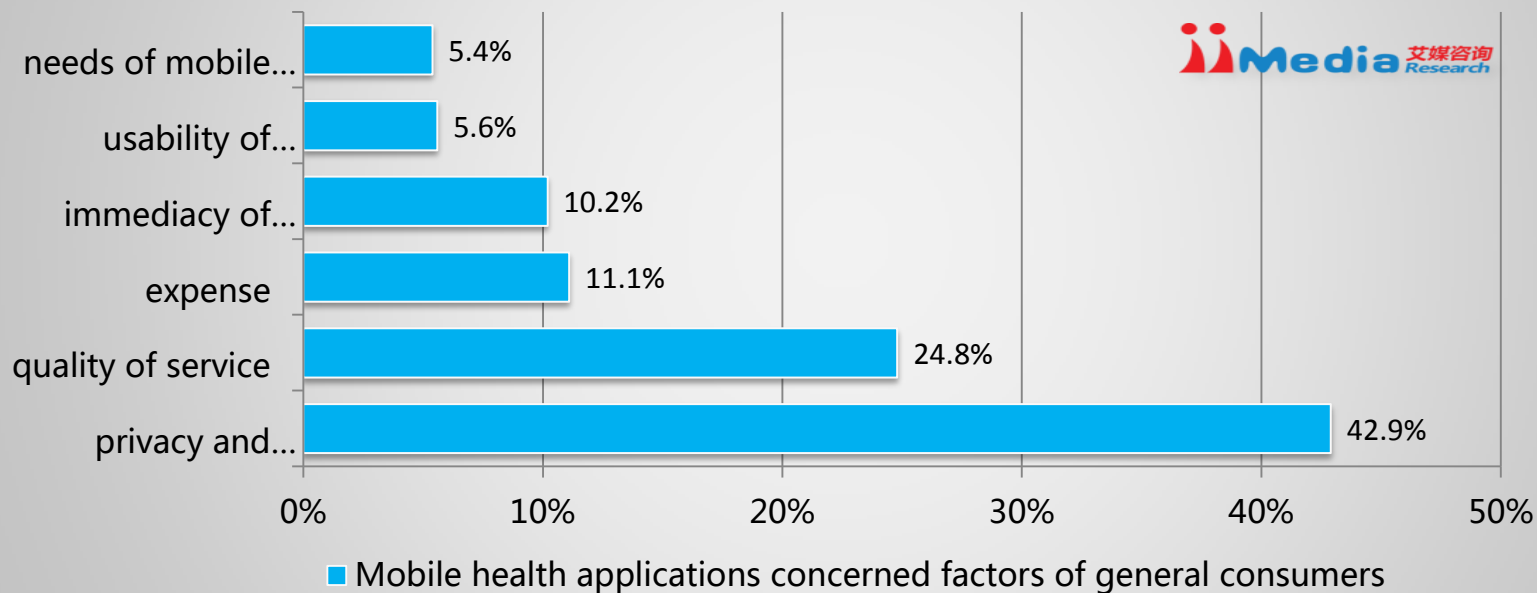
The top concerns: **security of the service (42.9%)**
quality of the service (24.8%)

Doctors' needs and focus area research of China mobile health (2012)

40.0%
Communication between doctors

37.8%
Doctors getting medical records

28.9%
Real-time communication with patients

26.7%
Remote data processing and diagnosis decisions

27.2%
Internal management of hospitals

24.4%
Patients' information collections

24.4%
Looking up medical literature

Doctor users' needs research of China mobile in 2012

Health monitoring
53%

diabetes
45%

hypertension
45%

The most worth to develop area research of mobile health applications thought by China doctors in 2012

Data sources：Economist Intelligence Unit,2012

Practical difficulties of China mobile health development (2012 -2013)

✚ The lack of medical resources, unreasonable allocation, difficult and expensive to see a doctor, medical innovation did not work well.

✚ Information systems of most public hospitals are in low openness, low standardization and low ability of data sharing.

✚ Use intention of medical staff is not strong.

✚ ....
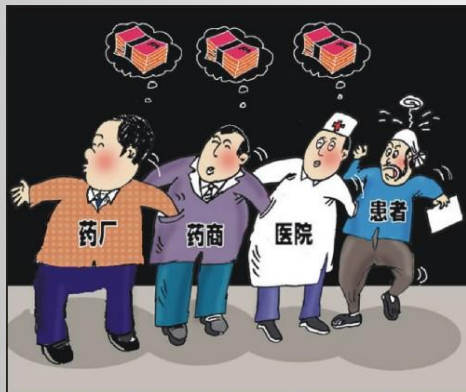
Industrial trends of China mobile health (2013)

✚ **Medical advice applications** will develop much steady.

✚ **Medical e-commerce platforms** will seek a transition by utilizing the advantages of mobile clients.

✚ Strengthen integrated **solutions of mobilizing information** to promote the building of hospital information systems.

✚ **Medical online training** will develop rapidly for the popularity of mobile health applications.

The outlook of China mobile health

✚ Mobile penetration of medical staff will be close to **100%** which will advance the development of mobile health in next 5 years.

✚ It will be **more common** for ordinary consumers to use mobile health products and services and it will be **more comprehensive** for doctors and patients to communicate in next 5 years.

移动
产业研究

深度
媒介传播

无线
广告监测

门户
艾媒网

政府
决策参考

iiMedia Research, a world famous third-party data mining and integrated marketing agency in the mobile internet, started to use the brand 'iiMedia' in 2007. iiMedia Research is China's first authoritative agency in the mobile internet, smart phone and E-commerce. After 2012, iiMedia Research officially became a member of CAMIR.