

GSMA
mHealth
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PwC



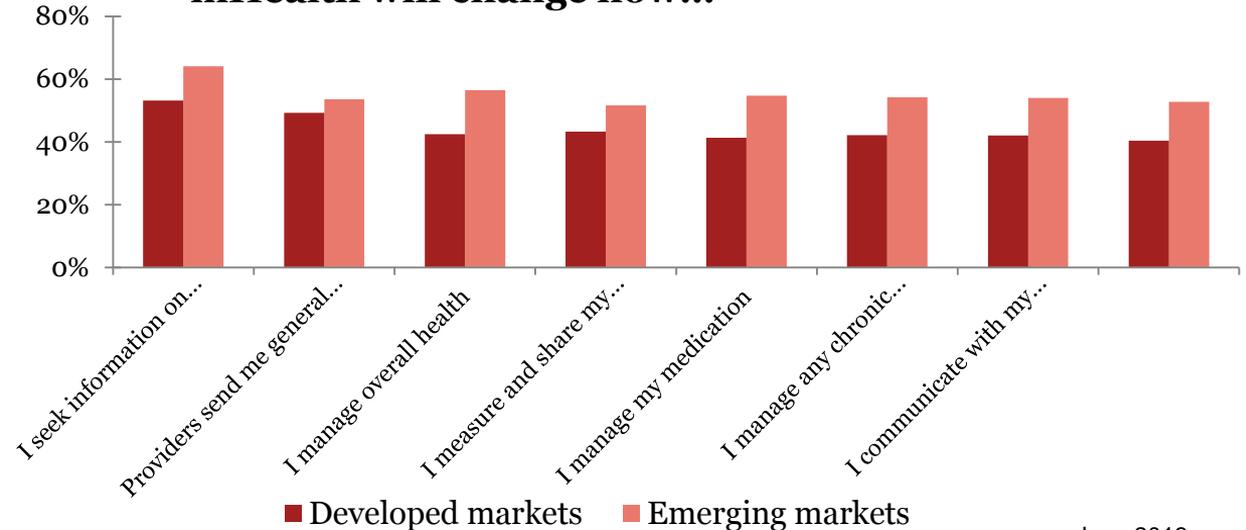
mHealth could enable change in emerging markets

61%

of surveyed patients in emerging markets are aware of term “mobile health” (vs. 37% in developed markets)

mHealth is less disruptive to healthcare in emerging markets because for a majority, it is not a substitution to care but rather the only access

High patient expectations in emerging countries: mHealth will change how...



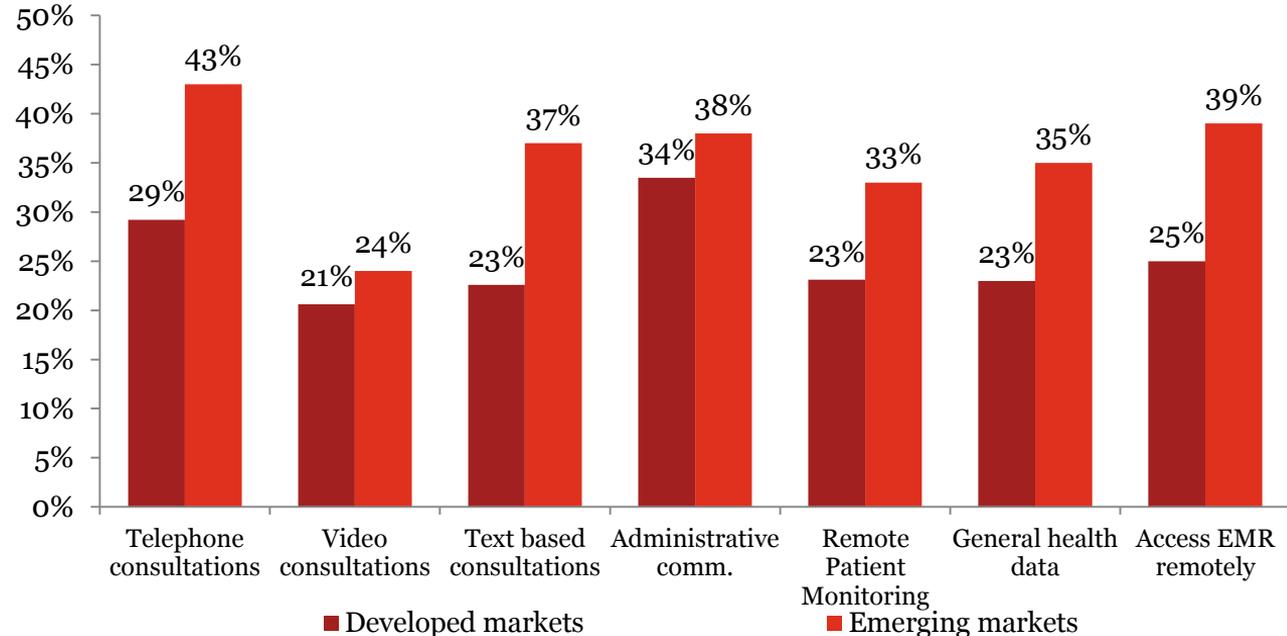
Increased awareness will result in higher adoption

43%

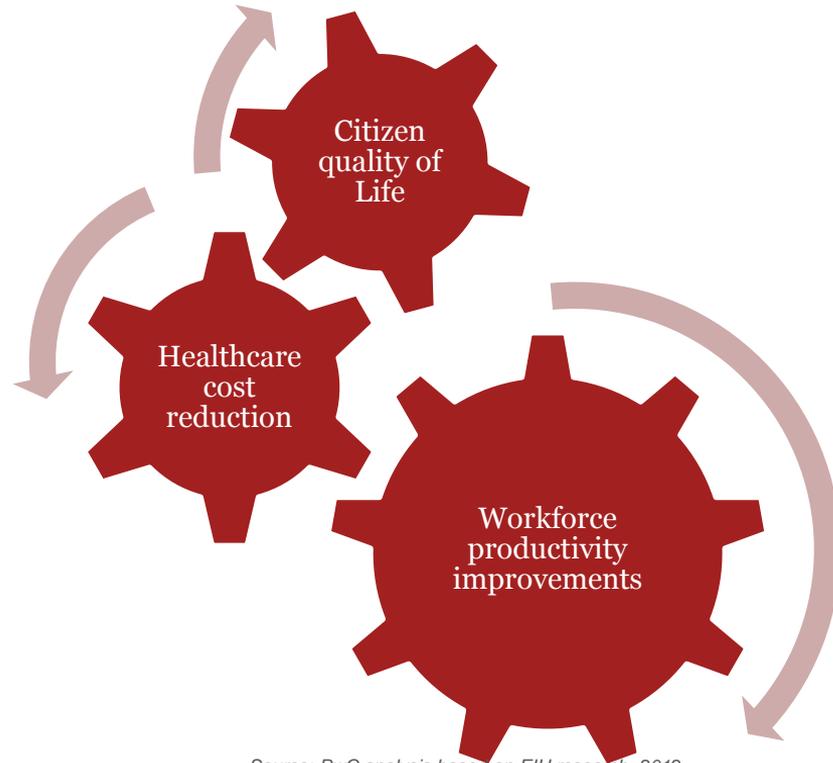
of payers in emerging markets pay or plan to pay for telephone consultations (vs. 29% in developed markets)

More mHealth services are covered by payers in emerging markets than in developed countries

Services payers have already begun to pay for



We have recently assessed 3 broad socio-economic impacts of mHealth in EU and emerging markets (Brazil and China)



mHealth could add 100bn USD to EU GDP and over 10bn to the GDPs of Mexico and Brazil in 2017

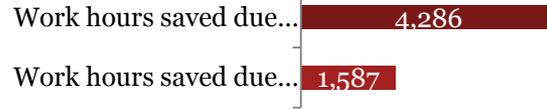


European Union

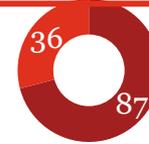
Early retirements avoided (mn)
0.5

Reduction in unpaid absentees (mn)
6.9

Extending professional lives for citizens by adding work hours (millions)



122 bn USD can get added to EU GDP



■ Wages ■ Taxes

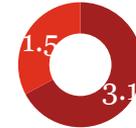
Latin America Brazil

Early retirements avoided (000)
97

Reduction in unpaid absentees (000)
1,200



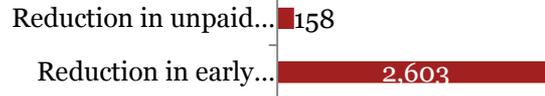
Further USD 4.5Bn added to GDP



Mexico

Early retirements avoided (000)
144

Reduction in unpaid absentees (000)
690

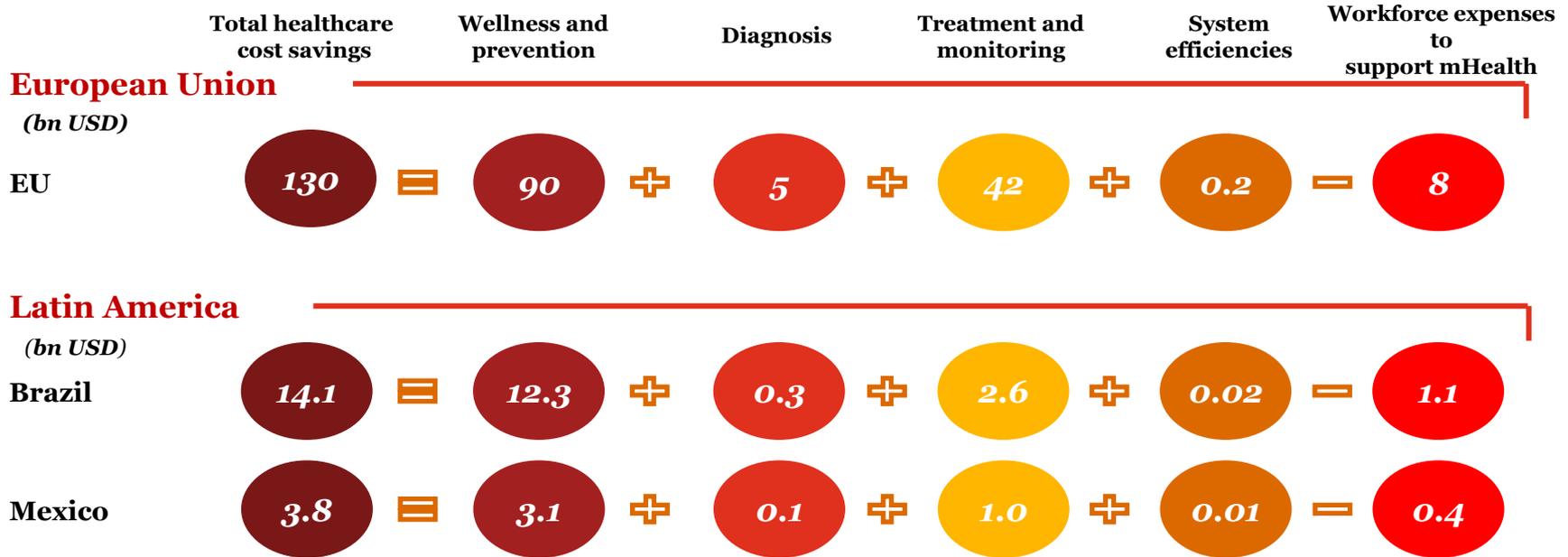
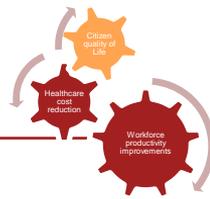


Further USD 8.4Bn added to GDP



Source: PwC Analysis
GSMA • mHealth

In 2017, mHealth could result in \$130bn lower healthcare cost across the EU, and \$18bn lower cost in Brazil and Mexico

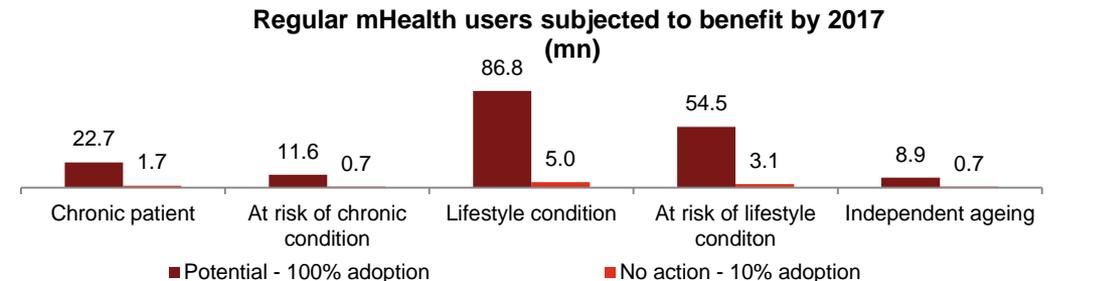


Source: PwC Analysis
GSMA • mHealth

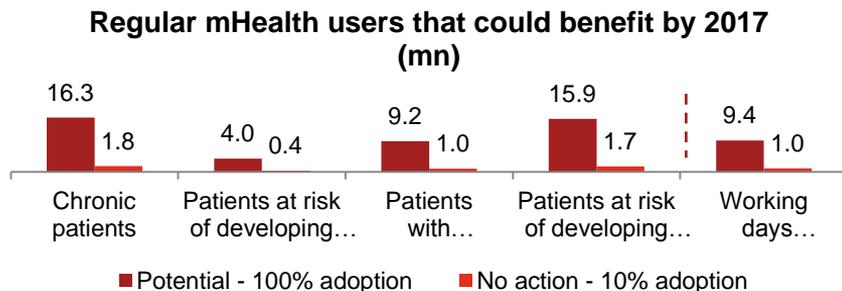
mHealth services could potentially improve the quality of life of ~150m people in EU, Brazil and Mexico by 2017



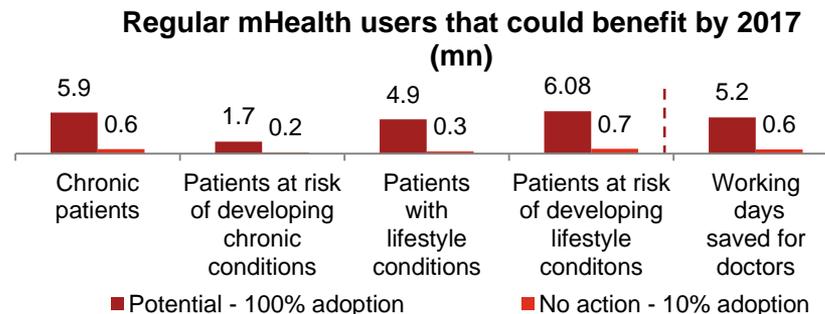
European Union



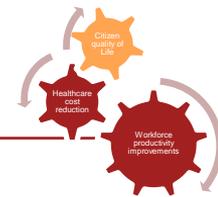
Brazil



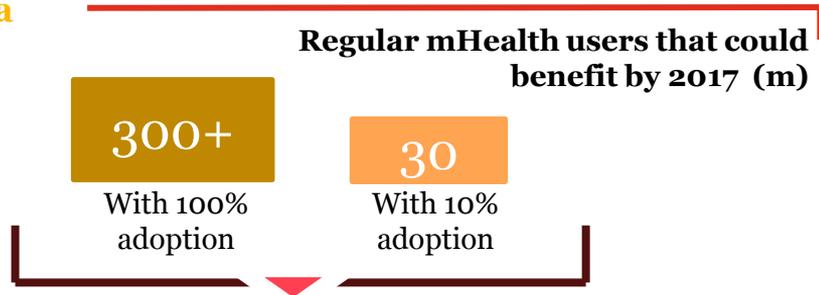
Mexico



With full adoption, mHealth could impact 300m people and save >\$40bn healthcare costs in China and India by 2017



China & India



China & India (bn USD)

Total healthcare
cost savings

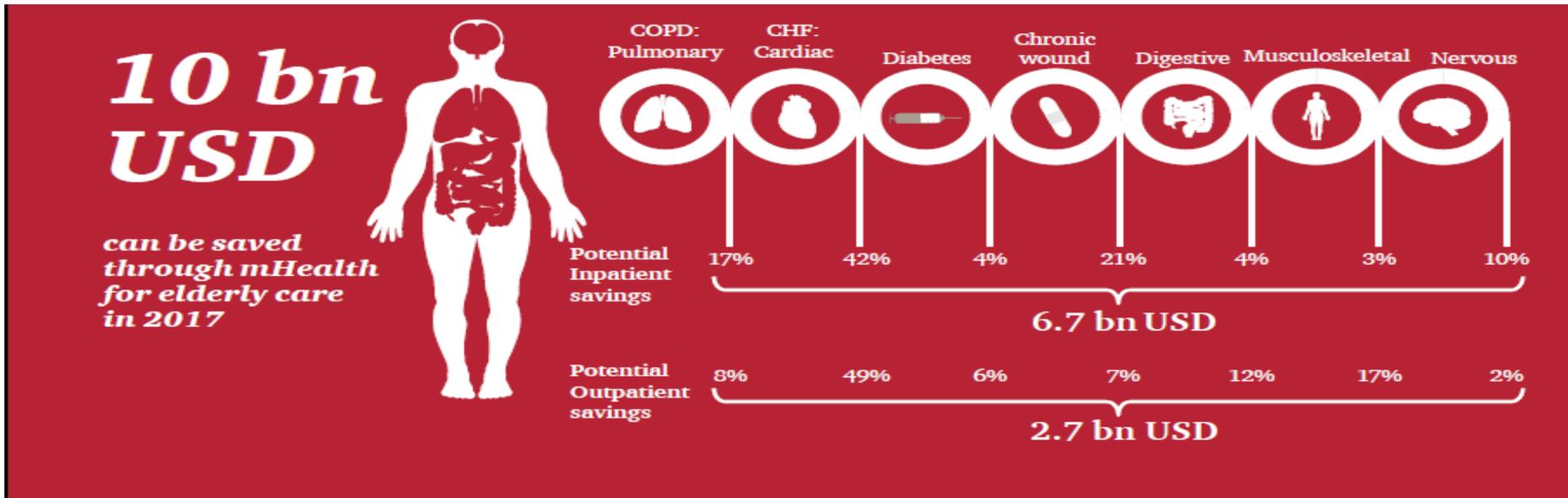
46

China & India (bn USD)

Addition to GDP

34

Developed Asia countries will also benefit: PwC analysis finds mHealth for the elderly in Japan could save over \$10bn in 2017



Thank You!