



Survey Results: mHealth Drivers and Barriers

Mobile Health (mHealth) initiatives, once viewed as experiments or luxuries, are now considered essential. According to research by famed Morgan Stanley analyst Mary Meeker, mobile internet use will overtake fixed internet use by 2014ⁱ.

Whether it's a standalone mHealth initiative, or an effort to add mobile to a multi-channel consumer engagement strategy, nearly all healthcare organizations have a mHealth initiative under way. The mobile platform has proven itself to be extremely effective for consumer engagement, particularly as it relates to health coaching (exercise tracking and medication reminders, for instance) – a key approach for improving health and lowering the cost of delivering high-quality care.

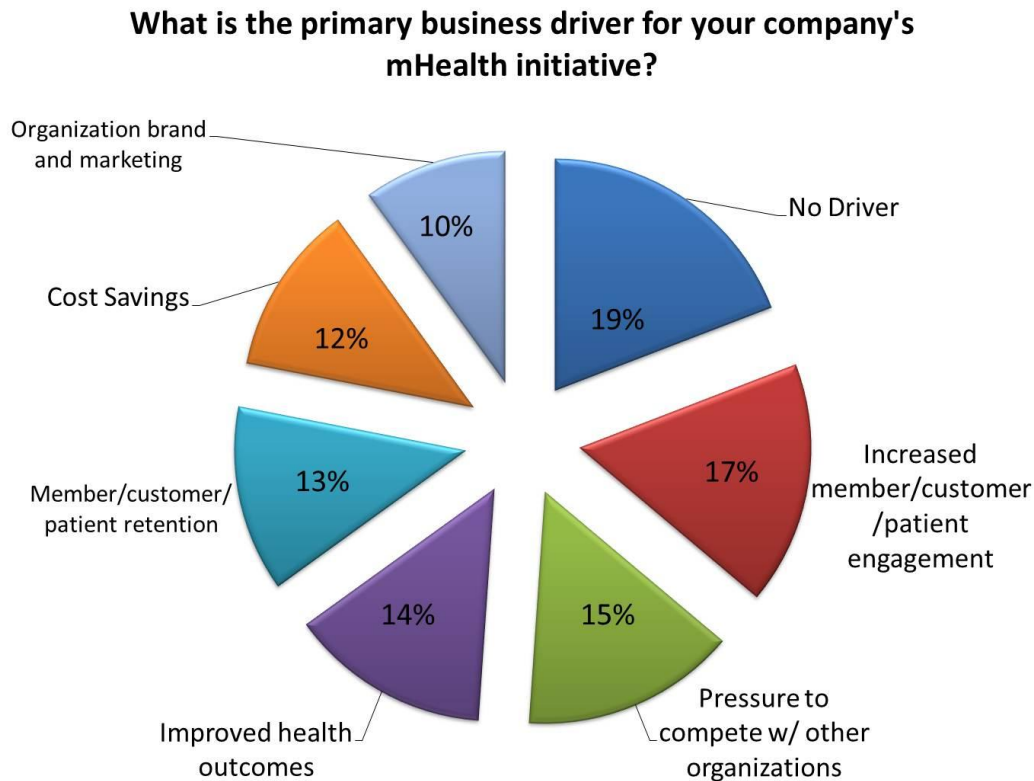
From April-July 2012, Medullan surveyed 106 healthcare providers, insurers and other healthcare-related organizations on their mHealth strategies and drivers. Among the findings:

Nearly **one in four** organizations is pursuing an mHealth initiative **without a specific driver**.

Among the 76 percent of respondents whose companies *do* have a driver, **the top choices were “Increased member/customer/patient engagement”** followed by **“Pressure to compete with other organizations.”**

Respondents report that the **number one barrier** to achieving their mHealth objectives is, **“No clear strategy or objective,”** followed closely by, **“Lack of leadership for the initiative.”**

What's driving mHealth initiatives?



Surprisingly, the most common answer to this question was “No driver” – nearly 1 out of 4 companies (23.9 percent) is embarking on mHealth initiatives without a business driver. It would seem that such initiatives are doomed to fail. Companies should not be putting mHealth initiatives in place with no plan, objective or clear driver.

Fortunately, the other 76 percent of companies *do* have a driver – top choices were “Increased member/customer/patient engagement” and “Pressure to compete with other organizations.” “Organization brand and marketing” and “Cost savings” were tied for last with just 8.7 percent of the votes each.

The picture changes when viewed through the lens of company size. For companies with fewer than 1000 employees, for instance, the top drivers were

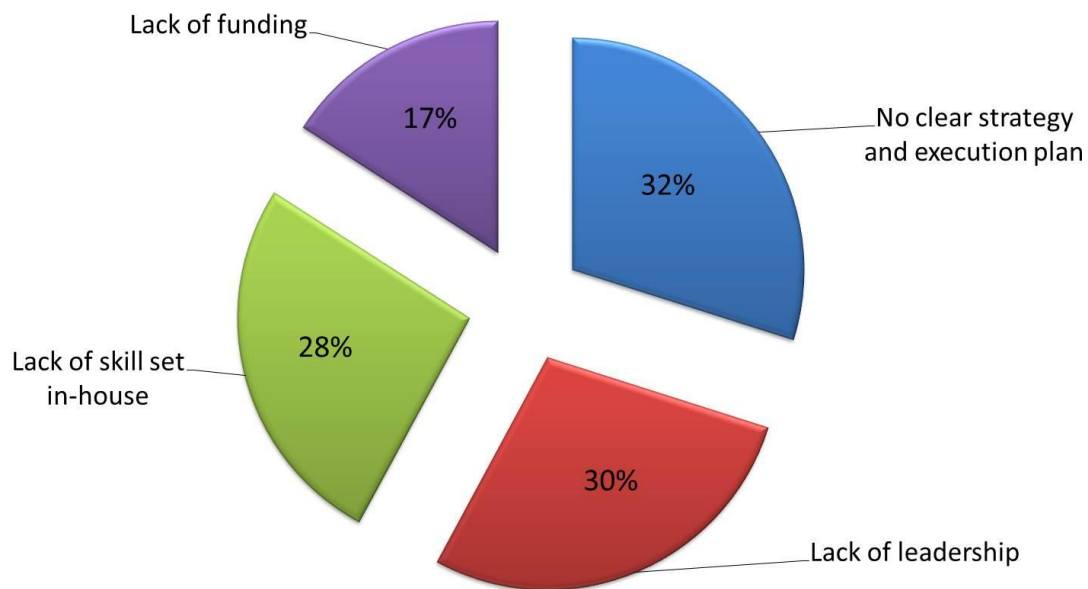
- “Cost savings”
- “Improved health outcomes,”
- With “No driver” coming in third.

For companies with 1000-4999 employees, the top driver was “Increased member/customer/patient engagement.” Only at companies with **5000 or more** employees was **“No driver” the top pick (at 23.4 percent of respondents – nearly one in four).**

Drivers also differed greatly among organization type. Health Plans, for instance, cited “Cost savings” and “Pressure to compete” as the top drivers for their mHealth initiatives, and no Health Plan respondents selected “No driver.” On the other hand, the top pick for Pharmaceutical companies was “No driver” (33.3 percent) with “Organization brand/marketing” a distant second. Similarly, approximately one in three Medical Device company respondents (35.7 percent) selected “No driver.” The top driver among Governmental organizations was “Increased member/customer/patient engagement.”

Key Challenges for mHealth Initiatives

What is the key challenge your organization faces in achieving its mHealth goals? (choose all that apply)



The top choice for this question across all respondents was, “No clear strategy and execution plan,” roughly echoing the sentiments expressed in question 1. No business driver coupled with no clear strategy or plan is a recipe for disaster. Interestingly, “Lack of funding” appears to be the least challenging aspect of getting an mHealth initiative going, though this too differed by company size.

For companies with fewer than 1000 employees, **“No clear strategy”** was far and away the number 1 challenge. For companies with 1000-4999 employees, the top challenge was **“Lack of skillset in-house.”** And larger companies, with 5000+ employees, cited **“Lack of leadership”** as the primary barrier.

Answers also varied greatly by organization type. In Government, for instance, the biggest barrier cited was **“Lack of funding” (62.5 percent)**. By contrast, Providers seem not to lack for funding, but for leadership and a clear strategy. Pharmaceutical companies’ biggest challenge is a **“Lack of skillset in-house.”**

Medullan offers expertise for addressing these important issues. Stay tuned for our upcoming white paper offering tips for ensuring the success of your mHealth initiatives. For more information or a free consultation contact us at ask@medullan.com or call 617-547-0273.

About Medullan

An IT consultancy, [Medullan](#) helps clients determine the best ways to engage healthcare consumers and then keep them motivated and connected. The firm supplements clients’ in-house teams to help bring focus to their ideas and move projects forward to completion. Medullan can partner with clients at every stage of a development cycle – problem definition, [user experience design](#) and software architecture – resulting in highly innovative web and mobile applications that help improve healthcare delivery and consumption.

In an environment defined by uncertainty, clients rely on Medullan’s unique combination of agility and health technology innovation experience to help them formulate ideas, guide their thinking with industry insights, and aggressively bring their applications to market. Among the companies to collaborate with Medullan are Aetna, Optum Health, Partners Healthcare, Health Plus Management Services, Mass.gov, MEDecision and Verizon Wireless. Visit www.medullan.com.

Appendix

Survey questions (N=106):

1. What is the primary driver for your organization's mHealth initiative?
 - a. Cost savings
 - b. Member/client/patient retention
 - c. Organization brand and marketing
 - d. Pressure to compete with other organizations
 - e. Increased member/customer/patient engagement
 - f. No driver
 - g. Other (please specify)
2. What is the key challenge your organization faces in achieving its mHealth objectives?
 - a. Lack of funding
 - b. Lack of leadership of the initiative
 - c. Lack of skillset in-house
 - d. No clear strategy and execution path
 - e. Other (please specify)
3. Type of organization you represent
 - a. Health plan
 - b. Provider
 - c. Government
 - d. Pharmaceutical
 - e. Medical device
 - f. Academia
 - g. Other (please specify)
4. Size of organization (number of employees)
 - a. 1-999
 - b. 1000-4999
 - c. 5000+

ⁱ <http://gigaom.com/2010/04/12/mary-meeker-mobile-internet-will-soon-overtake-fixed-internet/>