ACROSS HEALTH

in cooperation with

vodafone

Baxter

search engine marketing

eMeded self-service portal ROI

digital strategy customer centricity

benchmarking KPI framework fusion marketing

rep equivalent model organizational change

erep patient adherence social media

self-guided edetailing buzz monitoring

marketing mix

# How mHealth will fundamentally transform the Pharma-Patient-HCP triangle

*Fonny Schenck, CEO Across Health*

*Tony Kane, Head of Sales, Vodafone mHealth*

*Steve Lane, Head of Homecare, Baxter*

27.06.2011

# Agenda

**I. Across Health** (15 min.)

- **Fonny Schenck, CEO, Across Health**
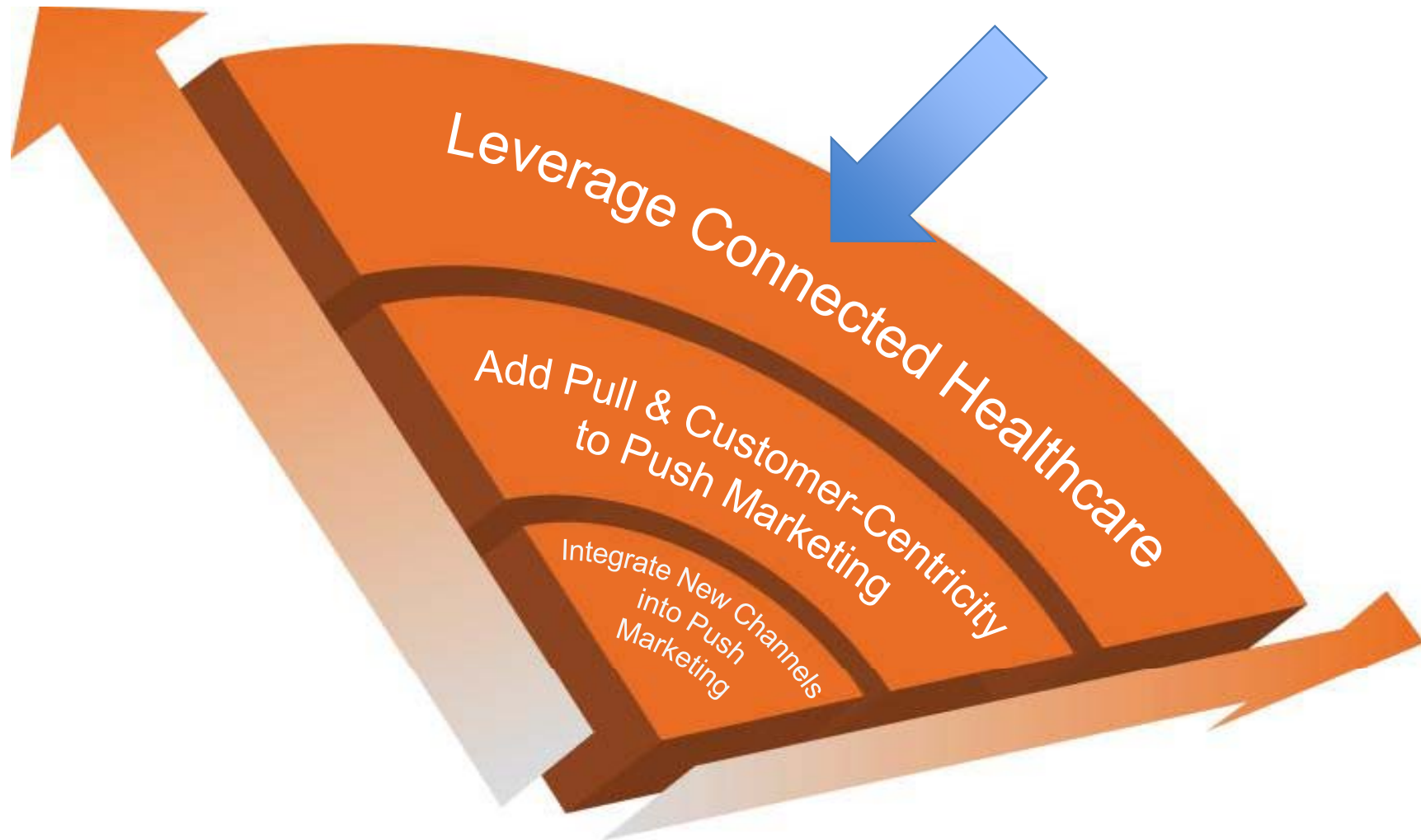
**II. Vodafone mHealth & Baxter** (30 min.)

- **Tony Kane, Vodafone mHealth Solutions**
- **Steve Lane, Head of Homecare, Baxter**

**III. 15-minute live Q&A**

# Across Health

- 60+ strong consultancy

- Life Sciences

- "Fusion": innovative customer-centric approaches

- Holistic: from strategy to execution & impact
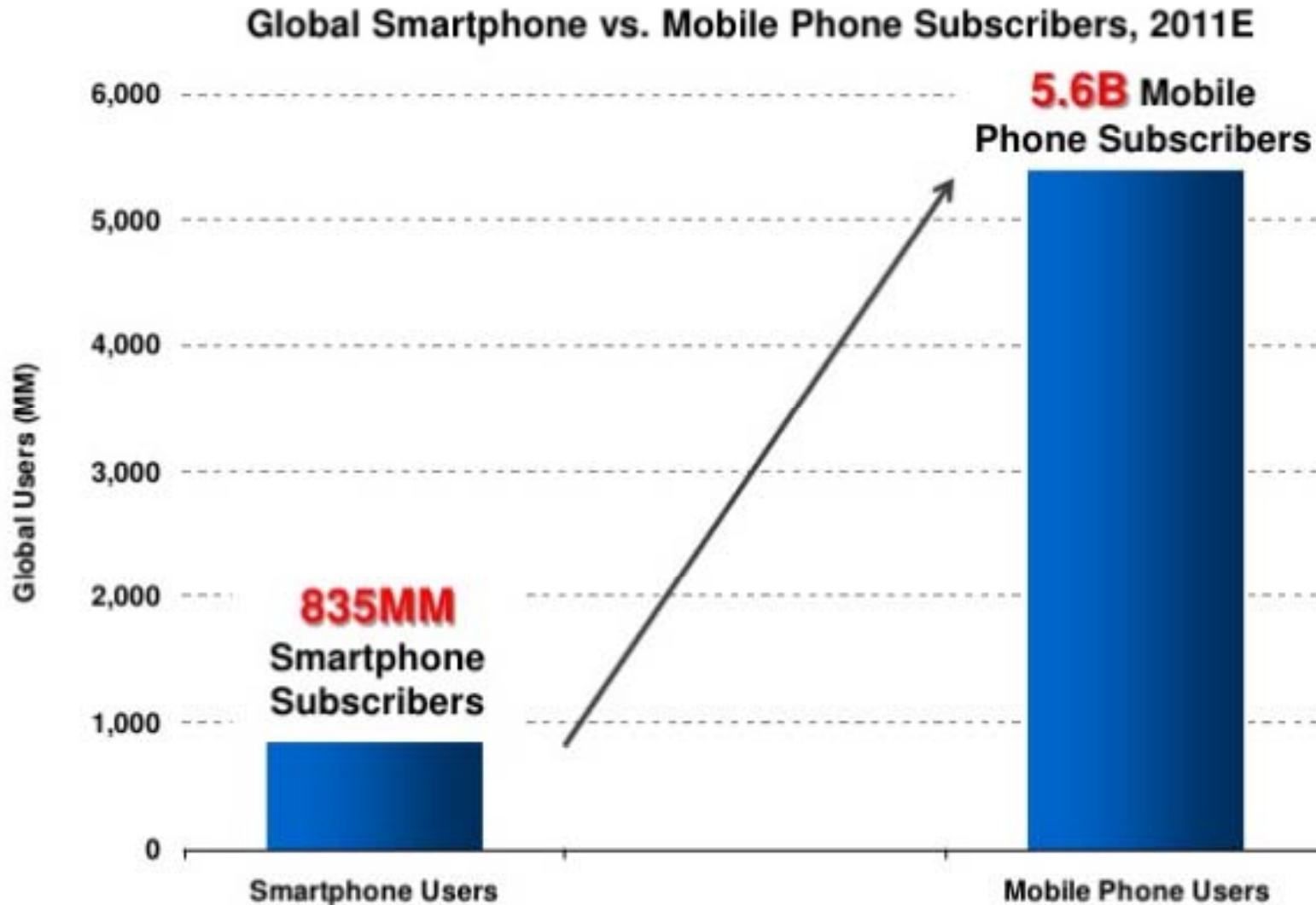
- Global footprint

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# Across Health roadmap



Leverage Connected Healthcare

Add Pull & Customer-Centricity to Push Marketing

Integrate New Channels into Push Marketing

# The history of the mobile phone

# Welcome to the PHYGITAL world...

"The mobile phone acts as a cursor to connect the digital & physical..."

*Marissa Mayer,
Head of Mobile & Geolocation,
Google*

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# And we have only just seen the beginning..



Global Smartphone vs. Mobile Phone Subscribers, 2011E

835MM Smartphone Subscribers

5.6B Mobile Phone Subscribers

Source: Smartphone subscriber estimates per Morgan Stanley Research; Mobile phone subscribers per Informa (as of Q2:11).
Note: While there are 936MM global 3G subscribers as of Q2:11, not all of them were smartphone users. One user may have multiple mobile subscriptions, therefore actual user #s may be lower than subscriber #s.

# The "internet of things" will create an even bigger wireless space

"All kinds of objects will have intelligence and the ability to communicate. P&G ships 40 trillion some objects per year, imagine them all connected."

Chetan Sharma, leading wireless analyst, 2011

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# Pharma marketers go mobile en masse too...

**8%** considers it a standard practices
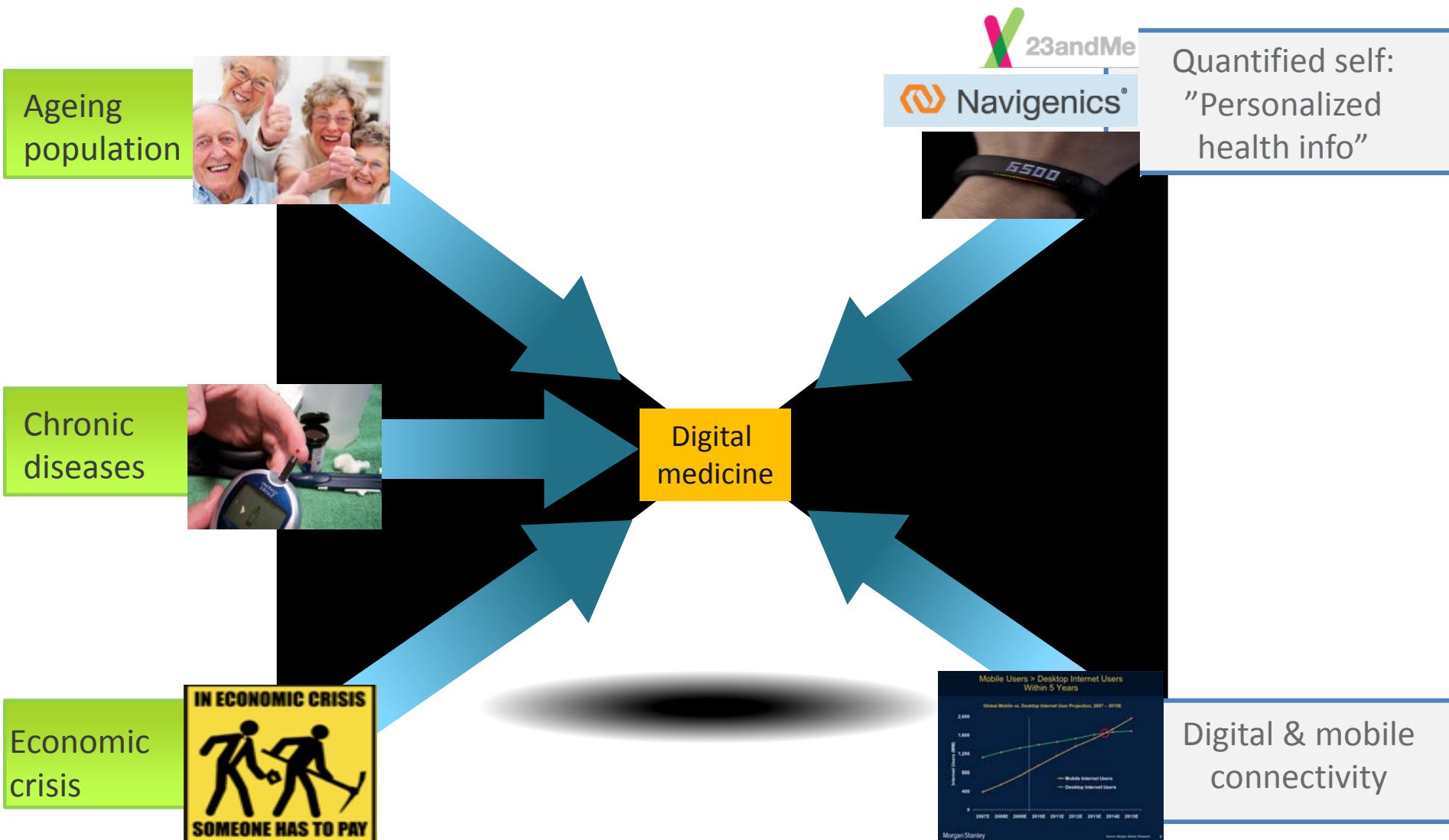
**17%** is using it often or very often

**43%** is piloting mobile

Source: Across Health Digital Barometer 2012
*http://www.a-cross.com/health/digitalbarometer2012/*

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Smartphone is the most popular technology among doctors since the stethoscope

# Key mHealth drivers and enablers

Ageing population

Chronic diseases

Economic crisis

23andMe

Navigenics®

Quantified self: "Personalized health info"
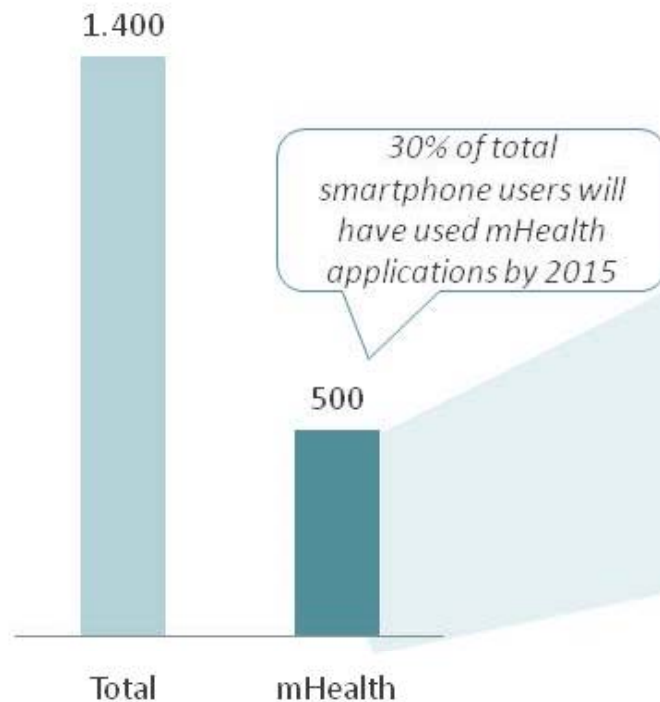
Digital medicine

Digital & mobile connectivity

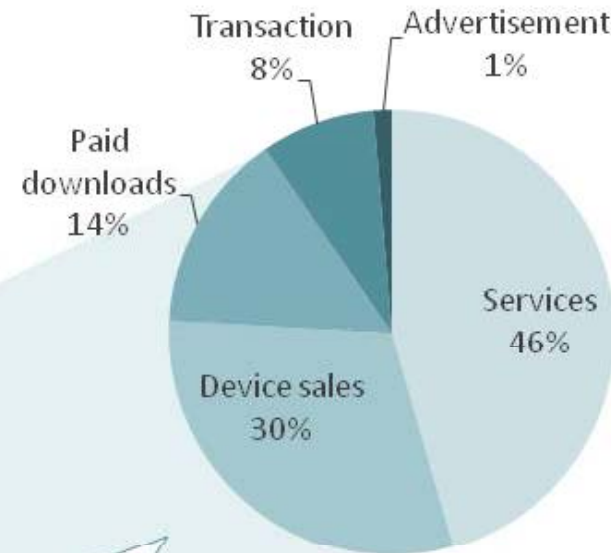# From the FDA's mouth

"Eliminating or reducing the number of routine visits could free up prescribers to <u>spend time with more seriously ill patients</u>, <u>reduce the burdens</u> on the already overburdened health care system, and <u>reduce health care costs</u>."

# mHealth market 2015: 500m people will be using healthcare smartphone applications

**Smartphone user base in 2015 (million)**

**Share of mHealth revenue sources of total mHealth market opportunity in 2010-2015 (%)**

1.400

500

*30% of total smartphone users will have used mHealth applications by 2015*

*Those mHealth users will mainly pay for services and devices*

Total

mHealth

Transaction 8%

Advertisement 1%

Paid downloads 14%

Services 46%

Device sales 30%

Smartphone applications will become the killer applications for mobile health solutions.

research2guidance
the mobile research specialists

# But we are still in the Old Normal…
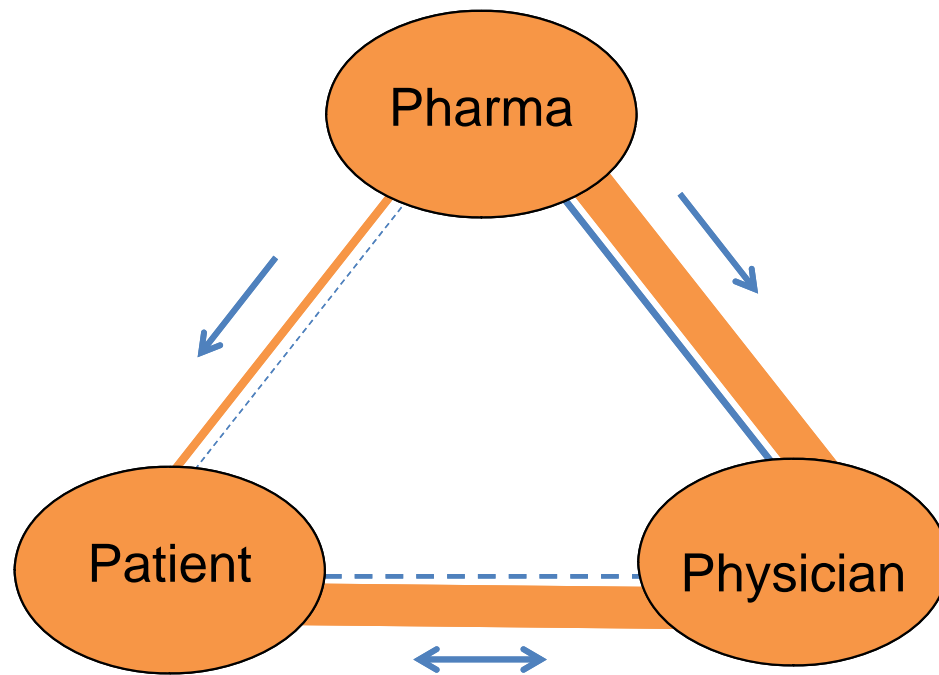


Digital channels
Physical channels

# Key hurdles

- **PRIVACY**

- **REGULATION**
  - *Medical apps that had to be FDA-approved increased by 250% in 2010-2011*

- **COST VS INCENTIVES**
  - *The only thing that is missing is INCENTIVES...everything else is there: the technology, the demand, the services,…[1]*

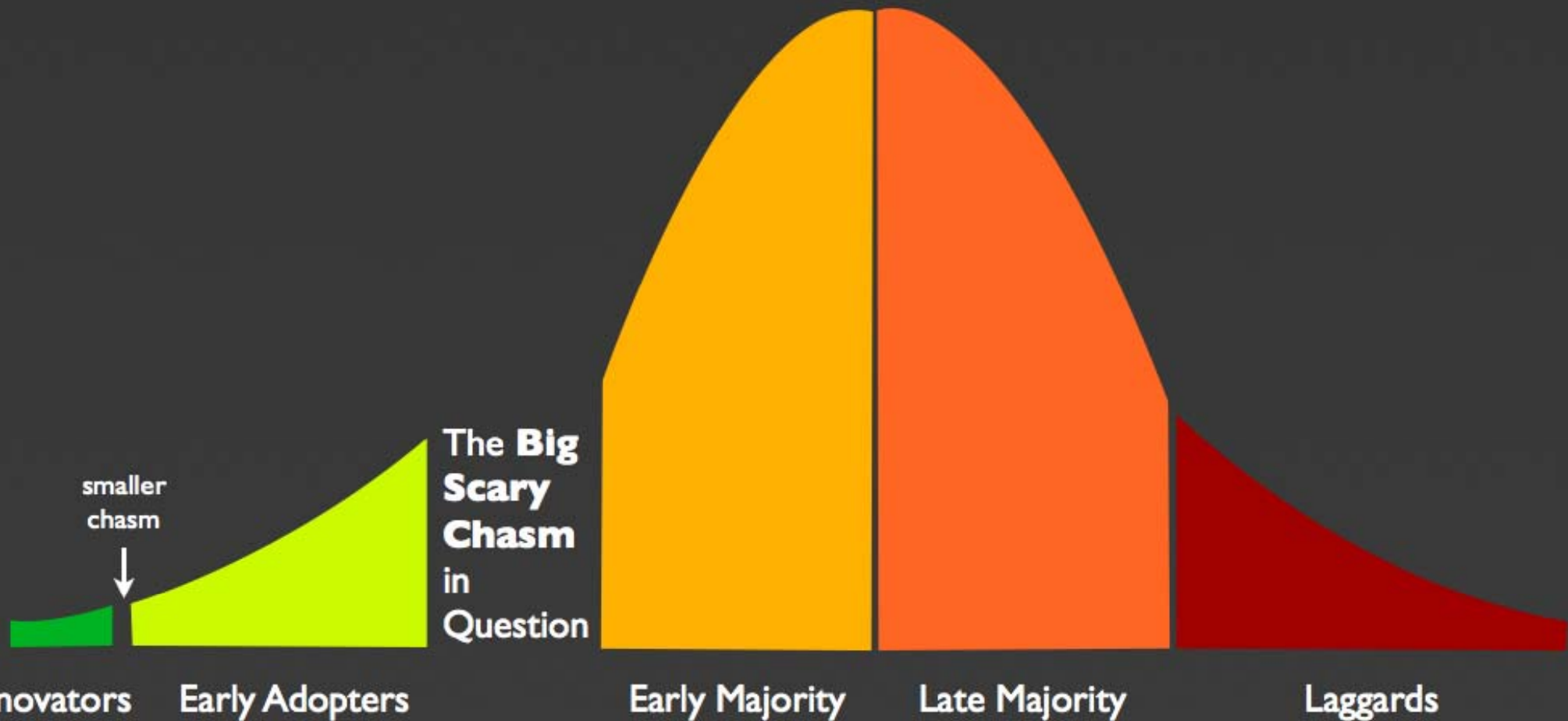- **LIMITED INTERCONNECTIVITY**

- **POOR USER EXPERIENCE**

Vodafone mHealth Solutions
**Evaluating mHealth Adoption Barriers: Human Behaviour**
Insights Guide
*power to you*

CUTTING THROUGH THE BARRIERS TO ADOPTION OF MHEALTH SERVICES

http://mhealth.vodafone.com/health_debate/insights_guides/

1 *Knut Haanæs, Global Leader, Sustainability Practice, BCG, 2012*
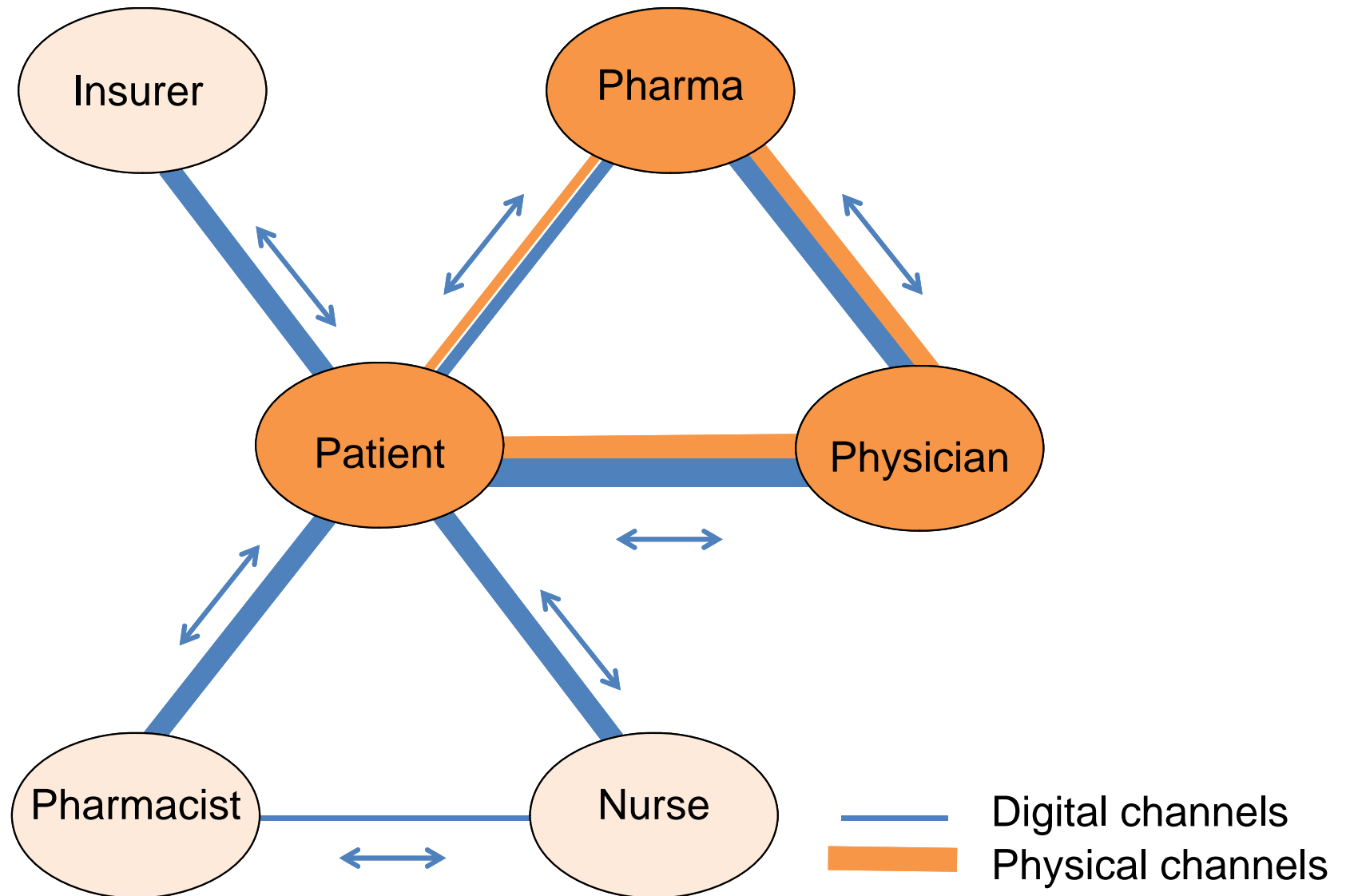
# What will bring us there?

- From self-entered data to automatically captured data

- From isolated systems to interconnected "cloud" eHR

- From desktop to anytime, anywhere

- From high-cost to free(mium)

- From optional to mandatory

- From unincentivized to incentived (positive or negative)

# The New Normal health ecosystem

# Mobile value in the New Normal

| Outcome, symptom, medication, ... tracking & remote monitoring | Medical info & product updates | Mobile CME | Mobile version of HCP self-service portal |
| --- | --- | --- | --- |
| • Learning for pharma & physician<br>• Better follow up & eventually outcomes for the patient | • Verified information source for physician & patient<br>• Direct (push/pull) channel for pharma | • More flexibility & convenience for physician<br>• Reach physician effectively outside professional hours | • Anytime-anywhere service relationship between pharma and physician |