

Unleashing the Power of Mobile Innovation in Healthcare

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Scott A. Snyder, PhD
President and Chief Strategy Officer
Senior Fellow, The Wharton School
ssnyder@mobiqurityinc.com
(610)-256-0662

The Premise

- **Mobility is causing a dramatic shift in the way people live and work**
 - **Changing Human Behavior** – the “last foot”
 - **Enabling a new level of precision and personalization** – in context
 - **Shaping our decisions** – explosion in the number of possible intervention points
 - **Mobile IS the platform** – more people are accessing information via mobile devices worldwide than through PCs
 - **It is disrupting business models** – empowered end-users (both customers and employees) are determining who wins and loses
- **Will require upgrades in technology, process, and innovation models to win**

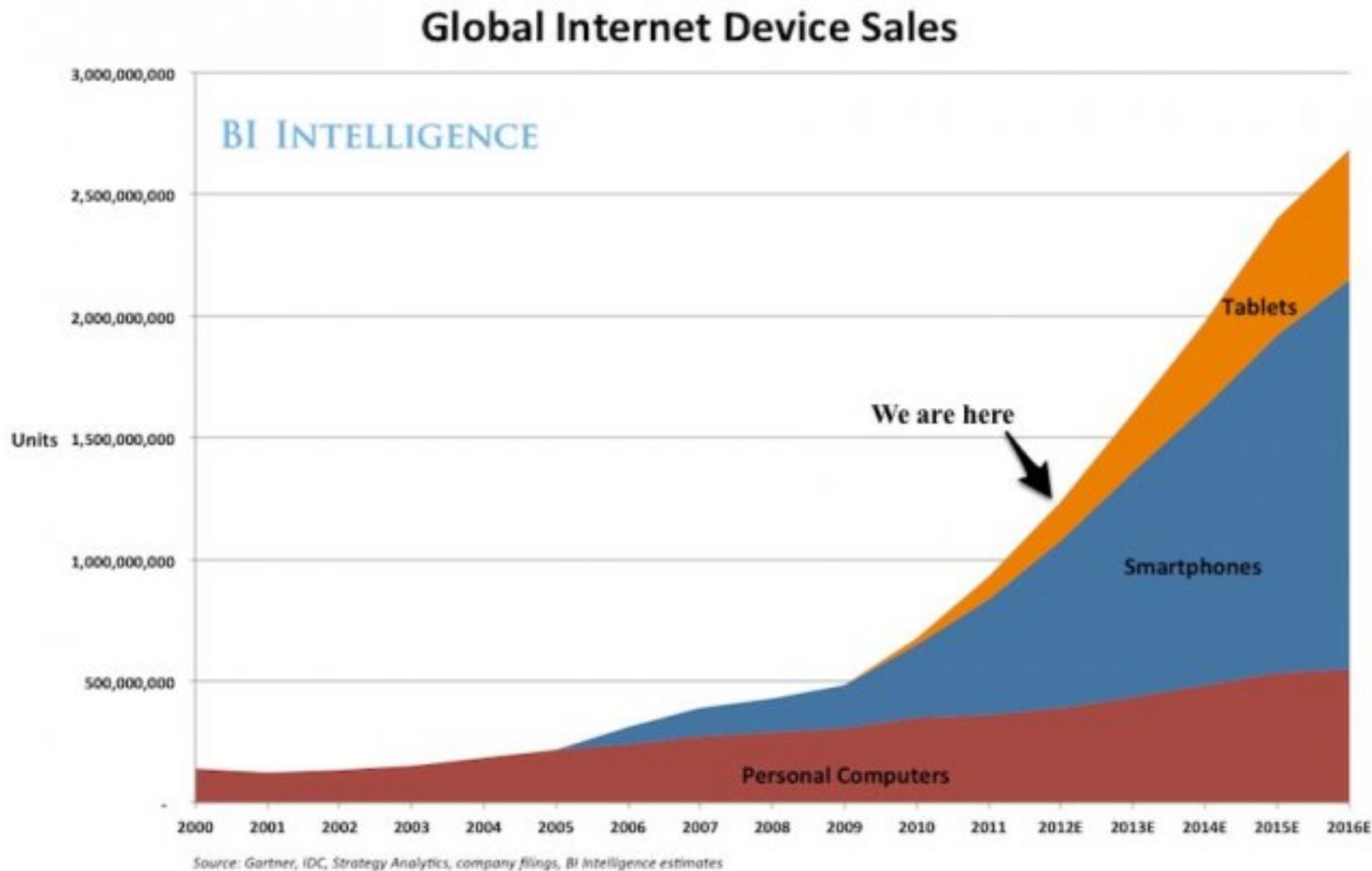
Key Trends - Mobile as a Driver

- 5.9B Mobile subscribers – 87% of world population
- 30% of mobile growth is in China and India
- \$240B in mobile transactions; \$1T by 2015
- 60% of social media users access via mobile; 40mm use daily
- 120mm tweets/day generated via mobile
- 550,000 apps and 25B downloads from iTunes
- 1.1B workers use mobile devices to access enterprise systems
- 82% of CIOs want to host mobile apps in the cloud
- 7.1 Exabytes/mo. of data generated from mobile devices by 2015

Key Trends - mHealth (Manhattan Research, 2011)

- Physicians almost doubled their use of tablets since 2011, reaching 62% in 2012, with the iPad being the dominant platform.
- One-half of tablet-owning physicians have used their device at the point-of-care.
- *81% of physicians use smartphones*, up from 72% in 2010.
- 26% of US adults used mobile devices for health information and tools in 2011, up from 12% in 2010.
- Mobile health applications generated about \$718 million in revenue in 2011, about seven times more than the estimated \$100 million generated in 2010.

The PC Era is Over! Tablets already 25% of PC market.



The Danger in Predicting Technology...



Like many emerging technologies, wireless looked unattractive and uneconomical at the outset until consumers understood the true value of mobility.

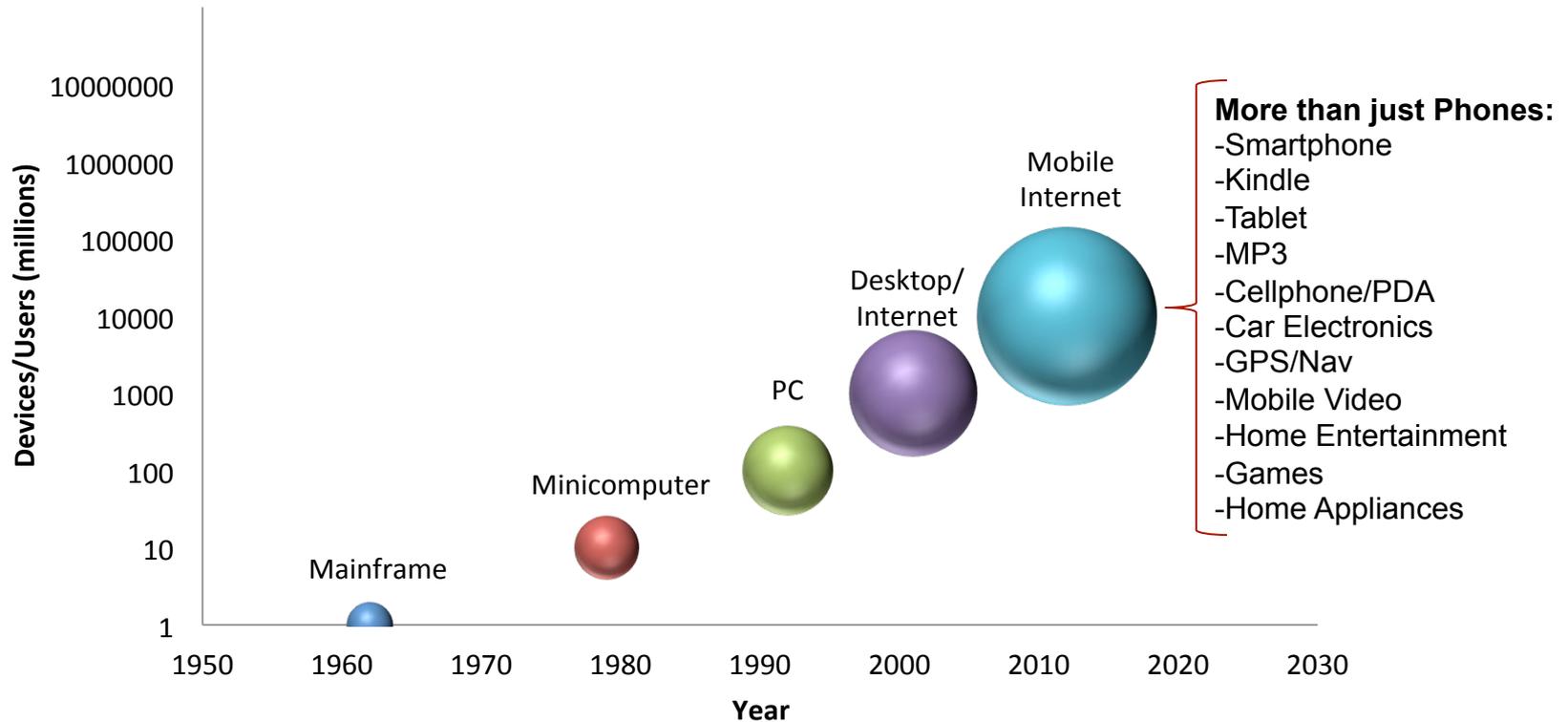
Mobility is a Killer App...



“There are some people whose fondest hope about tomorrow is that it looks just like yesterday”

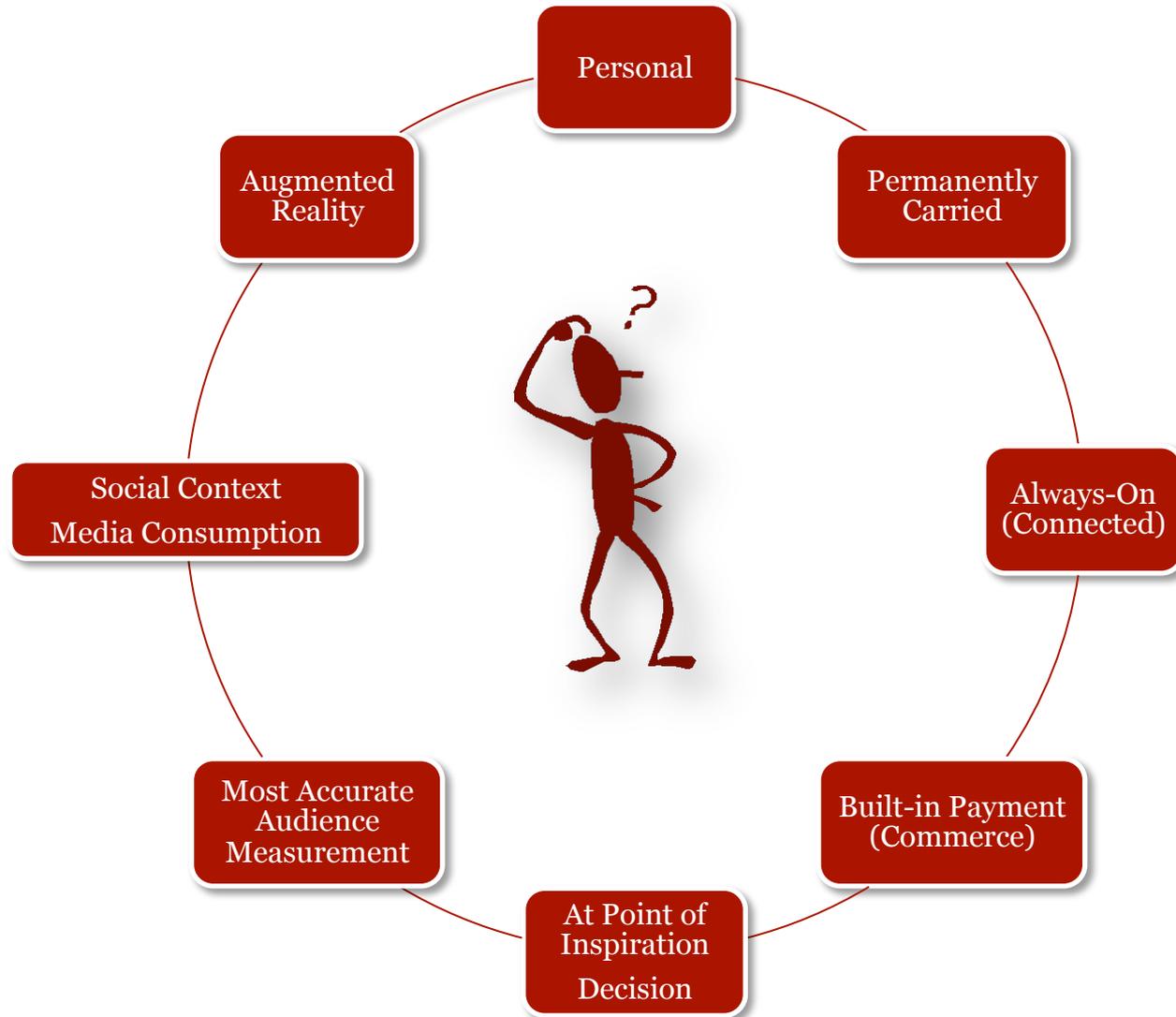
– Jack Welch

We are Entering the 4th Wave



Ref: ITU, Morgan Stanley Research, 2009

Unique Attributes of Mobile



25 billion and counting...



Social + Mobile Intersecting



Everyone Knows You're a Dog

...and Where You Are



"On the Internet, nobody knows you're a dog."



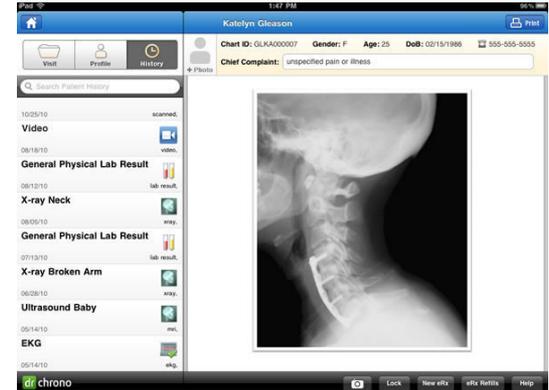
A screenshot of a social media post. At the top left is a small profile picture of a fluffy brown dog. To its right is the name 'Boo' in blue. Below the name is the text: 'what are YOU doing for turkey day? my plans: eat lots of food, rest my big head on my big paws, repeat.' Below the text is a large square image of the same fluffy brown dog wearing a blue collar. Below the image are the options 'Like - Comment - 1' and the text 'Cee Reen, Rebequ others like this.' At the bottom is a link 'View all 1,917 cor'.



Mobile as a Behavior Change Agent



mHealth is Reaching a Tipping Point....



Proteus ingestible sensors



Mobile is patient-centric



Feedback



Education



Compliance

Patient health affects the system

Hospitals

- Reduced readmission
- Prevents Worsening condition
- Better level of care
- Better communication
- Scheduling follow-up appointments
- Reduce pay for performance costs
- Streamlined billing



Insurance

- Keeping more patients healthy
- Predictive modeling
- Earlier intervention
- Education of surgical/non-surgical options
- Help patients navigate the system
- Leak rate on young healthy individuals

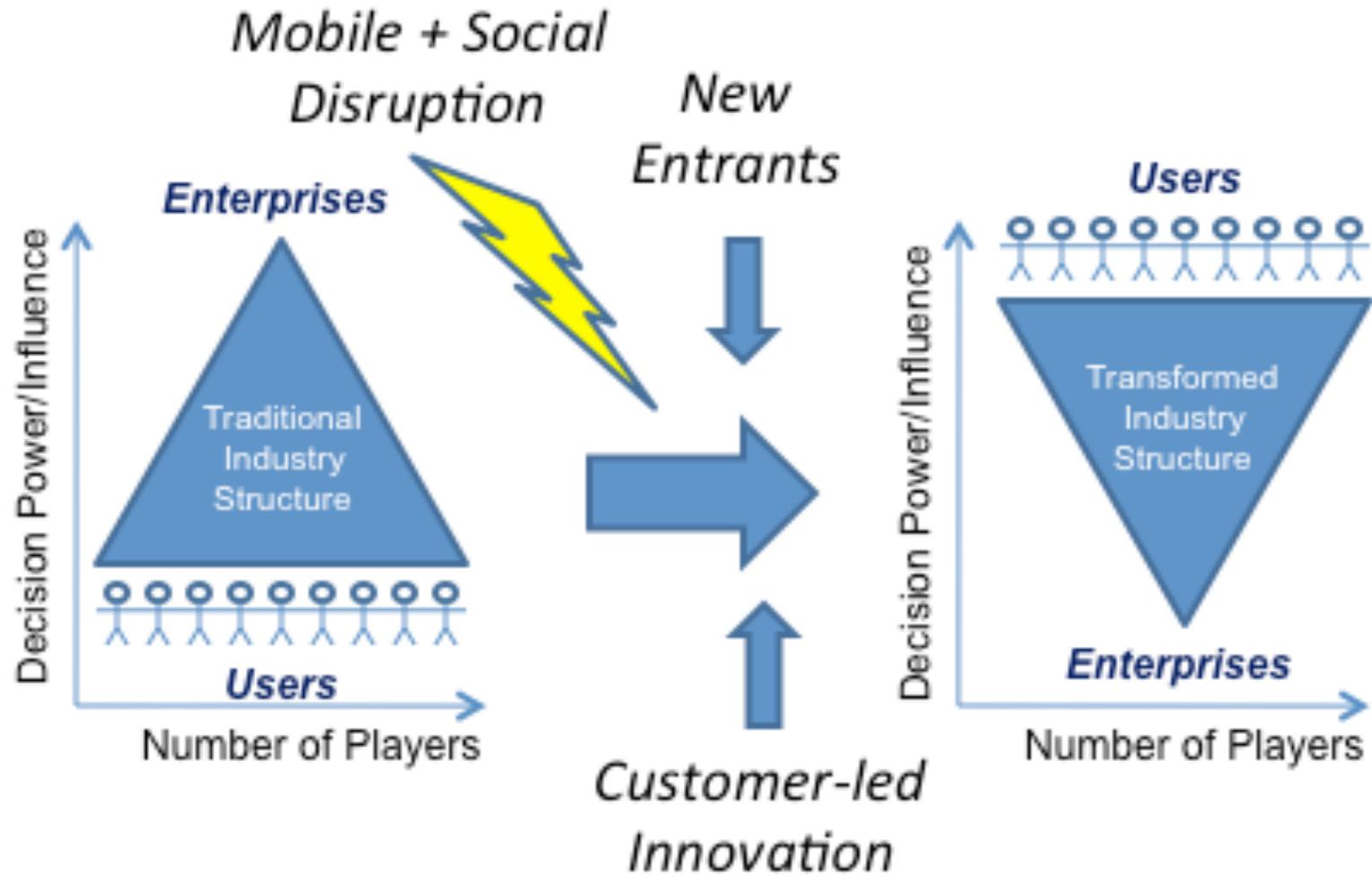
Doctors

- Patient metrics between visits
- Replacement inefficient patient calling
- Accountability for failures
- Better educated are less likely to sue

The Future Has Arrived...



Mobile + Social are Creating The “Big Flip”



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Digital is Disrupting Industries

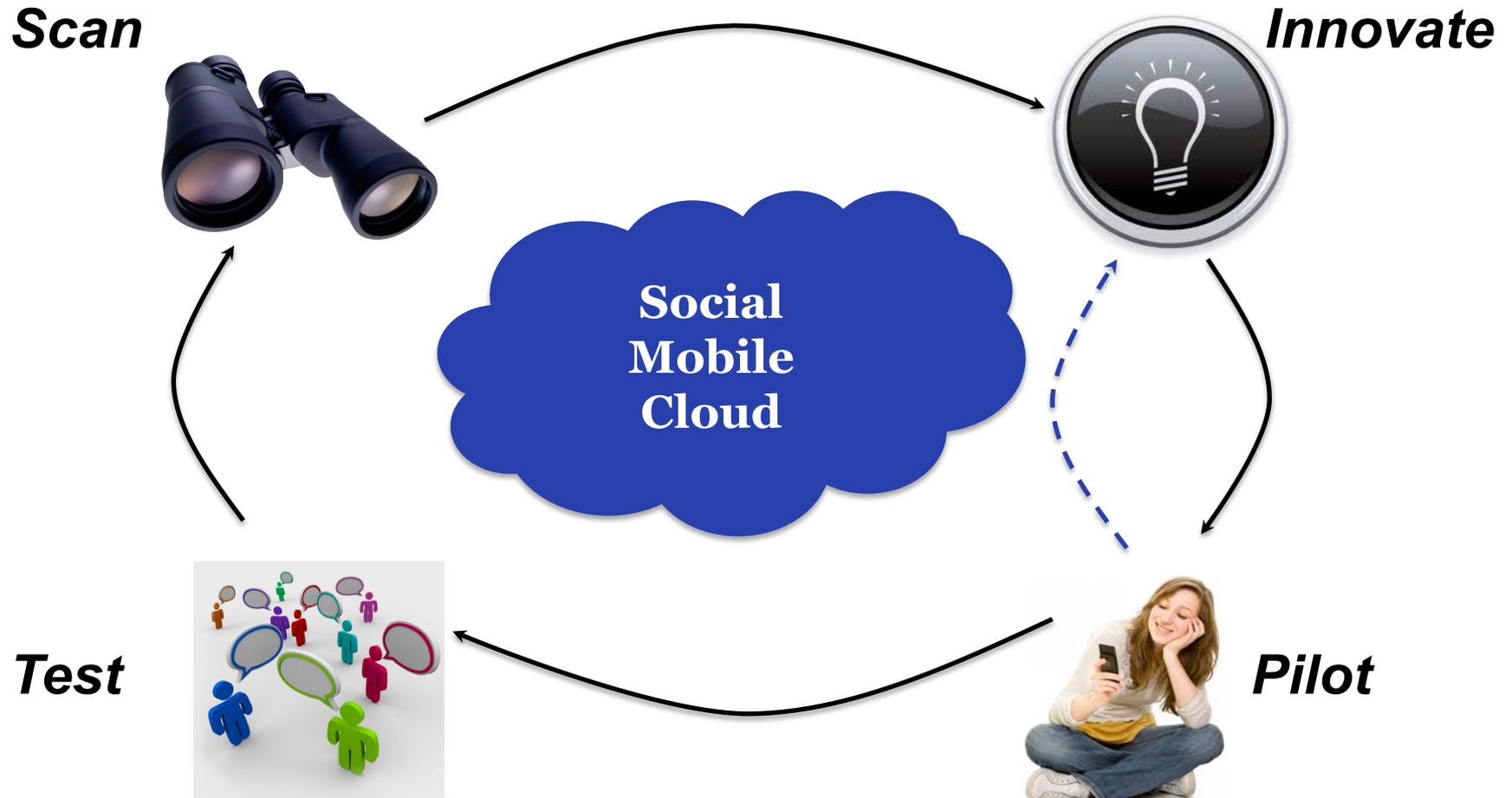
amazon.com.



“In addition to creating new markets and opportunities, this restructuring will overthrow nearly every assumption about who the industry's leaders will be and how they establish and maintain leadership.”

– Frank Gens, SVP IDC

Rethinking your Innovation Model



User Engagement + Fail Fast, Cheap, Often

Portfolio View



“Quick Wins”

- Low/Medium Impact
- Near term payoff
- Low risk
- Low investment
- Builds momentum
- Invest and Go



“Staged Bets”

- Medium/High Impact
- Mid-term payoff
- Medium Risk
- Low/Medium investment
- Easy to Pilot
- Invest and Learn



“Game Changers”

- High Impact
- Mid/Long-term payoff
- High Risk
- High Investment
- Significant Planning
- Ramped Investment

Giving up Control

“We have to strike the right balance between being in touch and being in control. The irony is the more in control we are, the more out of touch we become.”

– A.G. Laffley, CEO Proctor and Gamble

For More Information

- ▶ Mobile Strategy and Applications
 - ▶ www.mobiquityinc.com
- ▶ 4G Wireless and Digital Swarms
 - *The New World of Wireless: How to Compete in the 4G Revolution*, Snyder, Wharton School Publishing, 2009.
- ▶ Blog:
<http://blog.tmcnet.com/digital-swarm/>
- ▶ My contact information:
 - Email: ssnyder@mobiquityinc.com
 - Phone: 610-256-0662
 - Twitter: @snyder4g

