

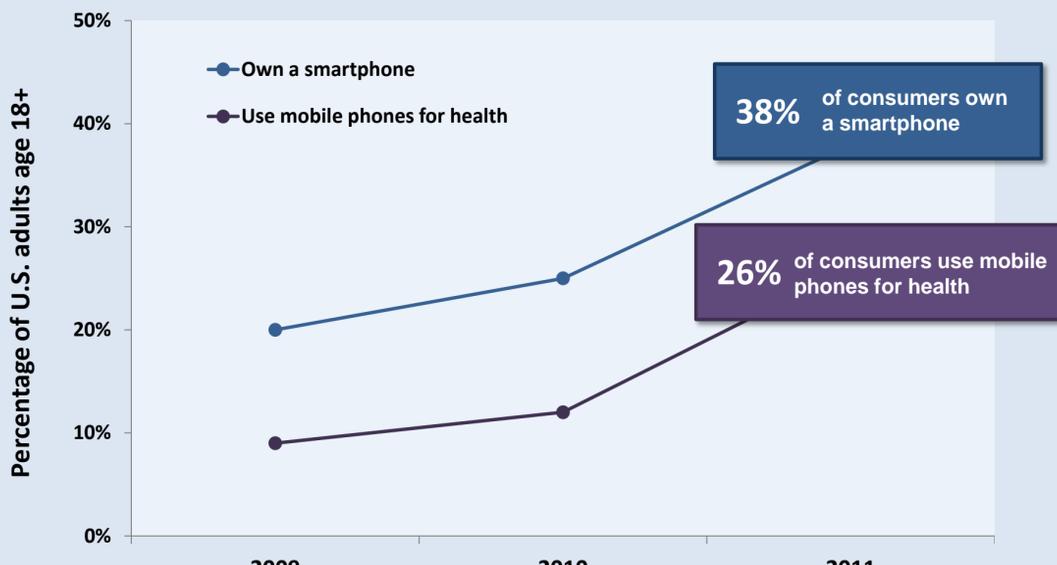


Mobile Health Trends for 2012

From Manhattan Research's Cybercitizen Health® U.S.

The mobile revolution has already been in full swing among physicians for the past few years, but not until now have we seen real pick up among consumers. As of Q3 2011, 26 percent of the U.S. adult population is using mobile phones for health information and tools. Still, consumer mobile health is fairly early in the game and centers more around information-gathering rather than using devices to support care. The most exciting days of mobile health are yet to come as we'll see mobile health bring about real healthcare changes by motivating behaviors and enabling on-going care and tracking.

Mobile Health Adoption Doubles Between 2010 & 2011



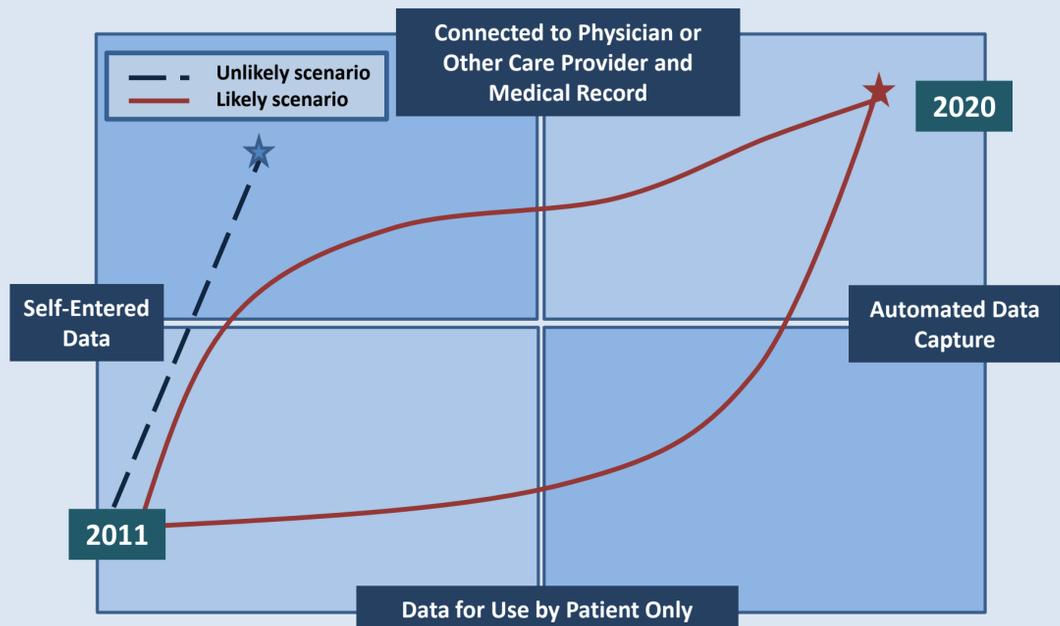
Source: Manhattan Research, Cybercitizen Health® U.S. 2009 - 2011

Mobile Health Myths & Realities for 2012

- #1 Myth:** In 2012, it will be all about mobile, mobile, mobile.
Reality: It's still a multiscreen world, meaning *multiple screens* - consumers are still very dependent on desktops/laptops for online health activities.
- #2 Myth:** Having a mobile strategy means building an app.
Reality: When it comes to mobile health information seeking, search and web browsing are more used than apps.
- #3 Myth:** Mobile = On-the-go
Reality: Mobile is anytime, anywhere – at home is actually the top location where consumers use their mobile phones to find health information.

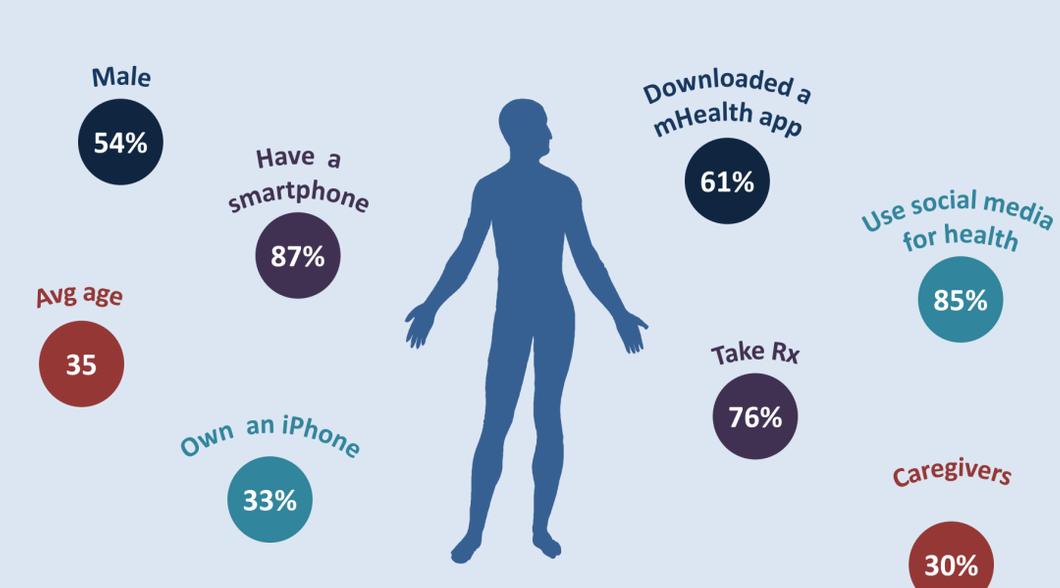
Evolution of Mobile Health Products & Services

When it comes to mobile initiatives that target patients managing and trying to improve chronic conditions, most health stakeholders consider automated data capture that ties back to the healthcare provider as the holy grail. Other scenarios, whereby consumers enter data themselves that provides either no feedback, or simply automated feedback from the software, are unlikely to improve patient outcomes. However, the ideal mobile ecosystem is also the most challenging to implement and unlikely to be possible for significant numbers of patients in this decade.



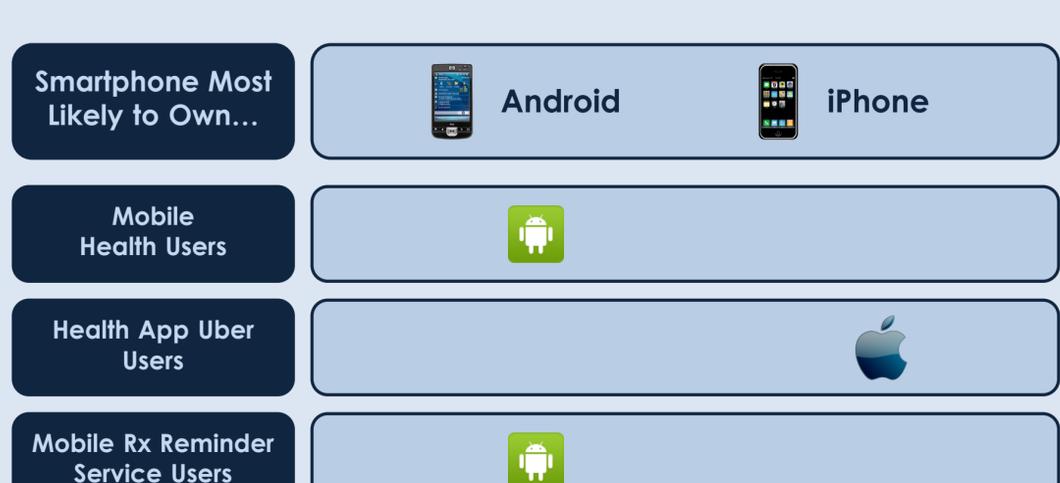
Source: Manhattan Research

Mobile Health User Stats



Among online U.S. adults ages 18+
Source: Manhattan Research, Cybercitizen Health® U.S. 2011

Mobile Health Showdown: Androids vs. iPhones



Among online U.S. adults ages 18+
Source: Manhattan Research, Cybercitizen Health® U.S. 2011

About Cybercitizen Health® U.S.

Manhattan Research's **Cybercitizen Health® U.S.** study has been tracking consumer digital health trends for more than ten years. The 2011 version surveyed 8,745 U.S. adults (age 18 and over) online and on the phone in Q3 2011. Digital health profiles are available for 80+ therapeutic categories.

Mobile health is just one topic covered in the study. Mobile health issues addressed include:

- Which health activities do consumers conduct on mobile phones?
- Where are consumers using mobile for health (e.g., at pharmacy, doctor's office)?
- How do consumers access mobile health information (e.g., search, browsing, apps)?
- How is consumer use of mobile health apps evolving?

Other study topics include:

- How is the health web evolving and how can marketers leverage emerging online health audiences?
- How does search and website behavior differ across the disease and treatment pathway?
- What role is digital health playing at the point of care for doctors?
- Do consumers want additional support and services from pharmacists and nurses?
- Is social media adoption for health maturing?
- How advanced are consumers in terms of recording and sharing their health measurements?
- Which pain points related to digital on-going care represent the strongest opportunity for health stakeholders?

For more information, visit www.manhattanresearch.com/cch or email sales@manhattanresearch.com.

Manhattan Research, a Decision Resources Group company, conducts annual research studies covering digital health trends among healthcare professionals and consumers in the Americas, Europe, and Asia.

Icons courtesy of:
http://findicons.com/pack/1007/crystal_like
<http://findicons.com/pack/2178/macros>
http://findicons.com/pack/2336/wpzoom_social_networking_icon
http://findicons.com/pack/268/mobile_device
<http://findicons.com/pack/260/hardwaremx>