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National Study Reveals mHealth has Vast Appeal in America

San Diego, C.A. — October 8, 2009 — A new national study released today at International CTIA WIRELESS I.T. & Entertainment 2009® by CTIA-The Wireless Association in conjunction with Harris Interactive, finds that almost eight in ten Americans (78%) expressed interest in mHealth (or mobile health) solutions and more than one in ten (15%) said they were extremely/very interested in learning more about it. Interest in mHealth service options was so strong that nearly 1 in 5 (19%) people surveyed said they would upgrade their existing wireless plan to participate and 11% said they would even consider switching wireless providers to receive mobile healthcare services.

This in-depth study uses research from an online survey of U.S. adults and an online survey of physicians to gauge their interest in mHealth service options. After being introduced to an overview of mobile healthcare services, such as wireless remote monitoring, 40% believe it would supplement the medical care they receive from their doctor now and almost one-quarter (23%) believe mobile health services might replace doctor visits altogether.

“These results clearly show that wireless plays an important role in solving the healthcare crisis in America. Wireless is the right medicine we need to help cure our country’s healthcare,” said Steve Largent, President and CEO of CTIA-The Wireless Association. “Americans want more choice and control over their own healthcare and recognize wireless can provide them that. Likewise, doctors see it as a way to improve treatment for all patients. mHealth is a great equalizer that will allow millions of Americans – no matter where they live or their economic situation – to have access to the same healthcare and to ‘visit’ the best doctors’ offices in the country, which ultimately mean significant improvements in the medical community’s ability to identify and resolve epidemics, reduce medical errors and expand preventative healthcare.”

The study indicates Americans are seeing great potential in the future of mHealth. Adults surveyed believe that those in rural areas had the most to gain from mobile health services (51%). Closely following were those with chronic diseases that needed monitoring (48%), retired/Medicare patients (41%) and caregivers (38%).

The doctors and specialists surveyed also had a high-level of enthusiasm for mobile health services. Physicians said more than one quarter of all their patients would benefit from such services and 80% of doctors and 89% of specialists voted to continue investment in mHealth.

“mHealth services could be the penicillin of the 21st century. It has the potential to be a game changer by reducing cost and improving the quality and convenience of healthcare around the globe,” states Joseph Porus, Vice President of Technology Research Group at Harris Interactive. “Consumers and physicians are just waking up to how powerful a vaccine mobile health services can become. It won’t be long before you look at your mobile phone and your doctor will ask you to open your mouth and say ‘Ahh.’”

Survey respondents strongly agreed or somewhat agreed that access to mobile healthcare services would result in the following benefits:

- Allow for more home-based care (68%)
- Make the patient feel like they are always being watched (57%)
- Offer a measure of safety for patients or their family/friends (57%)
- Give patients peace of mind (54%)
- Make medical care easier to obtain (51%)
- Give patients more freedom and choice (51%)

The survey also tested specific mobile health concepts. The most popular ideas for device applications included:

- Mobile Exams/Consultations
- Mobile Wellness Care
- Mobile Monitoring
- Mobile Elderly Monitoring

Background on the Study

This research was comprised of two different studies. The first study was conducted online among 3229 U.S. adults, 115 general practitioners and 129 specialists between September 11 and 16, 2009. A second study of 2334 U.S. adults was conducted online between September 8 and 15, 2009.

TABLE 1
MOBILE MEDICAL SERVICES USE IF OFFERED TODAY

“If this mobile medical service were available to you today, which best describes how you would use it?”

Base: All U.S. General Consumer Adults

	Total
	%
I would use this service in addition to going to the doctor’s office visits	40
I would use this service instead of going to the doctor’s office whenever possible	23
I would not use this service	37

Note: Percentages may not add up to 100% due to rounding

TABLE 2
MOBILE HEALTHCARE APPEAL

“Please indicate your level of agreement with each of the following statements?”

Base: All U.S. General Consumer Adults

	Strongly/ Somewhat Agree (NET)	Strongly Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Strongly Disagree
	%	%	%	%	%	%
Allow for more home based care	68	25	43	23	4	5
Make the patient feel like they are always being watched	57	23	34	29	9	5
Offer a measure of safety for patients or their family/friends	57	18	39	31	6	6
Give patients piece of mind	54	17	37	32	7	6
Make medical care easier to obtain	51	18	33	35	7	7
Give patients more freedom and choice	51	15	37	34	7	7

Note: Percentages may not add up to 100% due to rounding

TABLE 3
WHO STANDS TO GAIN FROM MOBILE HEALTHCARE

“Which, if any, of the following types or groups do you feel will be most helped by Mobile Healthcare?”

Base: All U.S. General Consumer adults

	Total
	%
People in remote areas	51
People with chronic diseases	48
Retired persons or Medical patients	41
People who are care givers (for individuals with chronic illnesses and/or the elderly)	38
People who are uninsured or underinsured	17
Doctors/Nurses	15
Insurance companies	13
Hospitals and healthcare providers	12
People in developing countries	12
Teens	2
Other	2
None of these	8

Note: Percentages may not add up to 100% due to rounding

TABLE 4
MOBILE HEALTHCARE SWITCHERS

“Based on what you now know about Mobile Healthcare, which of the following statements apply to you?”

Base: All U.S. General Consumer Adults

	Total
	%
I would upgrade my existing wireless plan to include mobile health services.	19
I would carry another mobile device to be able to have access to mobile healthcare services.	14
I would purchase a new mobile device that had the capability to deliver Mobile Health services.	12
I would switch my doctor or specialist to a new doctor who offered mobile health services.	12
I would switch my wireless network provider to a new provider if they offered mobile health services.	11
I would switch medical insurance providers to a new provider who offered mobile healthcare options on their policies	10
None of these	62

Note: Percentages may not add up to 100% due to rounding

TABLE 5
SUPPORT FOR MOBILE HEALTHCARE INVESTMENT

“Do you support the continued investment in developing Mobile Healthcare?”

Base: All U.S. Physicians

	Total – General Practitioners and Specialists Combined	General Practitioners	Specialists
	%	%	%
Yes	81	80	89
No	19	20	11

Note: Percentages may not add up to 100% due to rounding

TABLE 6
RELATIVE APPEAL OF MOBILE HEALTHCARE CONCEPTS

“Please indicate the concept you are most interested in finding out more about for yourself, and the concept you are least interested in finding out more about for yourself.”

Base: All U.S. General Consumer Adults (responding for self)

	Total
	Relative Appeal Index (100=average)
Mobile Exams/Consultations	144
Mobile Wellness Care	137
Mobile Monitoring	113
Mobile Elderly Monitoring	112
Mobile Medical Reminder	100
Mobile Medicine/Administration	88
Mobile Care in Remote Areas	87
Mobile Skin Screening 68	68
Infant Monitoring	52

Note: Percentages may not add up to 100% due to rounding
Indexes were created using Max-Diff, a method of scaling used to generate importance or preference scores for multiple items such as brands, concepts, or attributes.

TABLE 7
RELATIVE APPEAL OF MOBILE HEALTHCARE CONCEPTS

“Approximately what percent of your current patients do you believe could benefit from Mobile Healthcare?”

Base: All U.S. Physicians

Total – General Practitioners and Specialists Combined	General Practitioners	Specialists
Average %	Average %	Average %
27	26	33

Note: Percentages may not add up to 100% due to rounding

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Methodology

This Harris Interactive study was conducted online within the United States September 11 and 16, 2009 among 3,229 adults (aged 18 and over), and 115 general practitioners and 129 specialists. A second study was also conducted online within the United States September 8 and 15, 2009 among 2,334 adults (aged 18 and older). Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents’ propensity to be online.

All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error

associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, Harris Interactive avoids the words “margin of error” as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100% response rates. These are only theoretical because no published polls come close to this ideal.

Respondents for this survey were selected from among those who have agreed to participate in Harris Interactive surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in the Harris Interactive panel, no estimates of theoretical sampling error can be calculated.

These statements conform to the principles of disclosure of the National Council on Public Polls.

About CTIA-The Wireless Association

CTIA is the international association for the wireless telecommunications industry, representing carriers, manufacturers and wireless Internet providers. Visit www.ctia.org for more information.

About Harris Interactive

Harris Interactive is a global leader in custom market research. With a long and rich history in multimodal research, powered by our science and technology, we assist clients in achieving business results. Harris Interactive serves clients globally through our North American, European and Asian offices and a network of independent market research firms. For more information, please visit www.harrisinteractive.com.