How Mobile Technology is Changing How Healthcare is Delivered

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Today

- 5.3 Billion Cell Phone Users Today
- Global Sales of Smart Phones expected to hit 1.5 billion units by 2016
- 90% of the world’s population is covered by a commercial wireless signal
- Market for health apps is expected to quadruple to $400 million in 2016
Why High Tech ... Why Mobile?

Lowers admin costs, improves customer experience

<table>
<thead>
<tr>
<th>Airline check-in cost</th>
<th>Mobile check-in adoption</th>
<th>Banking Transaction Cost</th>
<th>Internet Banking Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent: $4.00</td>
<td>’08: 3%</td>
<td>Branch: $4.25</td>
<td>’08: 21%</td>
</tr>
<tr>
<td>Self-Serve: $0.14</td>
<td>’11: 15%</td>
<td>Self-Serve: $0.20</td>
<td>’09: 21%</td>
</tr>
<tr>
<td></td>
<td>’14: 400%</td>
<td></td>
<td>’10: 21%</td>
</tr>
</tbody>
</table>

Mobile technology is redefining consumer expectations

There will be OVER 7.1 BILLION mobile-connected devices\(^1\)

Traffic from tablets alone

2010 traffic from entire global mobile network

Network speed will increase 10-fold from 215 kbps to 2.2 mbps\(^1\)

Social networks may shift “coaching” away from one-on-one interactions

Smart phone traffic will grow 144% from 2010-2015\(^1\)

Tablet traffic will grow 216% from 2010-2015\(^1\)

% of internet users in the U.S. who live with a chronic disease and go online to find others like them\(^2\)

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1: Cisco Visual Networking Index
3: Academy of Marketing Studies Journal, Jan 2008
4: IATA 2009 Survey
5 Ways Digital Apps & Smart Phones are Transforming Healthcare

• Improved Access to Care
• Improved Patient Engagement
• Real-Time Data Transfer
• Reduction of Medicare Fraud
• Improved Patient Safety
Adoption of New Technology by 50+ Individuals

50+ adults are becoming increasingly accustomed to using wireless devices

Cell phone ownership¹
- 79%

Tablet/laptop ownership¹
- 42%

50+ adults and their caregivers are seeking mobile health solutions

50+ Adults¹
- 42%

Caregivers¹
- 39%

Use mHealth
- 11%

Want mHealth
- 3%

Social media use among adults aged 50-64²

2005
- 5%

2010
- 42%

2. Madden, Mary. Older Adults and Social Media. Pew Internet & American Life Project
Example

Current pain points:
• Low touch with limited early detection capability (reactive care)
• Highest service cost per consultation (i.e. $150-200)

Current pain points:
• Inadequate ROI
• High cost
• Limited reach; medium to low risk patients underserved (e.g. mailings)
• Unable to monitor/intervene in real-time (proactive care)

With mHealth Solution

Without disease management

Current pain points:

With disease management

Current pain points:

4 visits per year
6 calls per year

Continuous monitoring & real-time feedback
Integration with Payer Platform and System Solution
Clinical monitoring & intervention

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Executive Summary

Top Three Reasons Companies Pursue mHealth Solutions.

• Reduces Operating cost/expenses (59.7% of respondents)
• Reduces Medical costs (56.3%)
• Clinical and quality improvement (55.7%)