

mHealth: A check-up on consumer use

Consumer interest in mobile health (mHealth) is strong, and its potential to improve health care is high. Despite this interest, however, Deloitte's 2013 Survey of U.S. Health Care Consumers shows that consumer adoption of mobile health technologies remains limited. And yet, the tools for mHealth are already in consumers' hands – nine in 10 Americans own a cell phone; over half of these are smart phones.¹ One in three uses their phone to look for health information.² Consumers are comfortable with mobile-enabled shopping, travel, and banking so, why not health care? Privacy and security concerns, skepticism about the accuracy of apps, and a gap in what some consumers say they want and the health care industry's current capabilities are limiting factors.



Status update: How consumers currently use mHealth

Data shown reflect responses of survey participants.

Although interest in mHealth is strong, uptake remains limited to early adopters, with Millennials leading the charge.



10% have downloaded an app to track their health using a mobile device. **19%** of Millennials have downloaded such an app.

17% have used technologies including smartphone and tablet applications to monitor and manage fitness and health improvement goals such as exercise or diet. **44%** say they would be interested in doing so in the future. **25%** of Millennials have used such technologies.



15% have used technologies to monitor and manage health issues such as blood sugar or breathing function. **46%** would be interested in doing so in the future.

8% have used technologies to receive alerts or reminders to take medication or other treatment. **40%** would be interested in doing so in the future. **11%** of Millennials have used such technologies.



5% used a computer or mobile device to send or receive a picture related to a health problem to/from a health care provider. **55%** feel comfortable with the idea but have not done so yet. **8%** of Millennials have sent a picture.



Primary diagnosis: A core group of mHealth skeptics

Not everyone is convinced that mHealth is risk-free. In addition to privacy and security, accuracy and reliability are leading concerns.



22% of respondents say mobile apps are **NOT** likely to be highly accurate and very reliable. **29%** of Seniors believe this to be the case.

23% say mobile apps are **NOT** likely to greatly assist them in improving their health or managing a health condition. **17%** of Millennials say this compared to **34%** of seniors.



31% say mobile apps are likely to have potential errors.

31% say mobile apps are suited only to fitness and wellness purposes, not for managing serious health conditions. **34%** of Millennials, compared to **26%** of Seniors, believe this, suggesting that Millennials are more mature users and see nuanced differences between wellness and health.



35% say they are concerned that the privacy and security of their personal information might be at risk when using a mobile device to access health records or tests online.

mHealth demand is already here

Consumers are comfortable with the idea of using technology in new and different ways and are interested in using mHealth in the future.



13% have accessed, stored, or transmitted personal health information or records in the past year. **48%** are interested in doing so.

36% have no concerns about using mobile devices to pay a medical bill; **23%** have done so in the past year.



52% say they would like access to tools or websites that enable them to review quality rankings, satisfaction rankings, and patient reviews for specific doctors and hospitals.³

Although most consumers don't currently use mobile-enabled communications to facilitate information sharing with their health care providers, the majority say they would be comfortable...



using a video, computer program, or mobile device app to learn more about or choose between different treatment options for a particular condition

62%

addressing a health concern through an email or text with their health care provider

62%



consulting with their health care provider through a video connection

52%

¹ Pew Internet and American Life Project. Health Online 2013. January 15, 2013.

² Pew Internet and American Life Project. Mobile Health 2012. November 8, 2012.

³ Deloitte 2012 Survey of U.S. Health Care Consumers.

What do these mHealth views mean for you?

As providers and payers increasingly turn to mobile-enabled health care, the tools for deployment are already in consumers' hands. Consumers are ready, willing, and able to use mHealth – once convinced of the accuracy, value, and security of technologies. When these hurdles to adoption are overcome, mobile technology will be poised to transform health care.

About the survey: Each year since 2008, the Deloitte Center for Health Solutions has surveyed a representative sample of up to 4,000 U.S. adults about their interest in and ability to operate in a consumer health care market. The Deloitte Center for Health Solutions works each year to identify global, national, and local trends. We survey consumers, physicians, and employers to examine market responses and develop insights that help companies understand what's happening – what will happen next – and what to do about it. Learn more at www.deloitte.com/centerforhealthsolutions.

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