



Creating a Value Constellation: Exploring Wearables and Apps for Pharma Brands

November 2018

Executive Summary

Apps and wearables are widely used technologies that have massive potential for health. This whitepaper explores whether at this time pharma should to consider using them in campaigns and best practices for doing so.

Digital health is not about having a Facebook or Twitter page or even an app. It is about creating a value constellation: value to the patient (e.g., 5.3 months more of disease-free survival for a cancer patient); value to the healthcare stakeholder ecosystem (e.g., billions in cost avoidance); and ultimately value to pharma (beyond the pill). In a world where 4 million apps exist yet users only turn to 5 on a daily basis, a key performance indicator in digital health is becoming one of those 5 apps that gets used daily. And that is something we must become obsessed with as we prepare digital health solutions that address the constellation of varying stakeholder needs.

- Excerpted "[From Sick Care to Health Care: Insights and Inspiration from Digital Health World Congress](#)" by CMI/Compas leads Dr. Susan Dorfman and Nicole Woodland-De Van

Wearables:

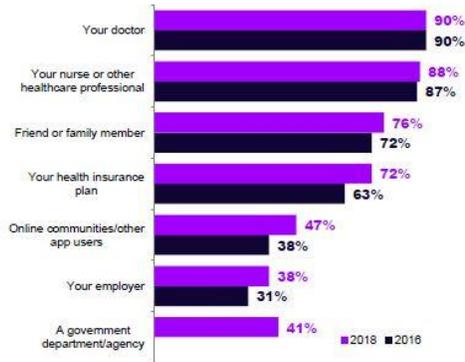
Wearables are immensely popular in the US as the quantified self that seemed like such a faraway idea just a few years ago has today become ubiquitous. Fitness trackers such as Fitbit and Apple Watch are the most widely adopted, with [more than half](#) using them daily. There are other wearables emerging continuously, offering monitoring of sleep, monitoring babies, detection of cancer, smart toothbrushes and other health-related services.

Health tracking via wearables offers some interesting opportunities in health, especially as we now have the Big Data tools – such as machine learning – to process and make sense of massive amounts of data. [Project Baseline](#), funded in part by Google sister company Verily, was created to find ways to detect cancer and other diseases earlier. The research aims to collect samples and data from 10,000 healthy adults. And in a number of cases, payors are providing fitness trackers to customers and offering discounts and prizes to encourage healthy activity.

ATTITUDES TO WEARABLE TECHNOLOGY

CONSUMERS ARE WILLING TO SHARE DATA FROM WEARABLES

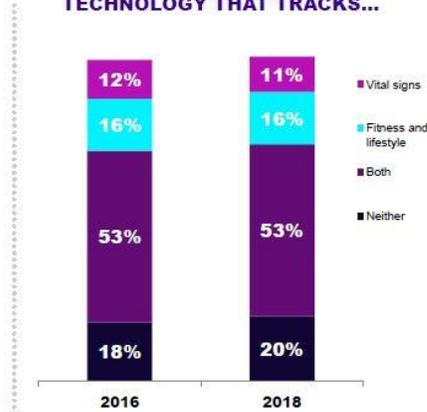
WILLINGNESS TO SHARE WEARABLE HEALTH DEVICE DATA WITH...



Q: How willing would you be to share information from your wearable technology or mobile app with each of the following?
 Base: U.S. total sample 2016 n = 2,225; 2018 n = 2,301
 [Percentages above are the sum of the top two responses on a seven-point scale, where 7 is "very willing"]

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WILLINGNESS TO WEAR TECHNOLOGY THAT TRACKS...

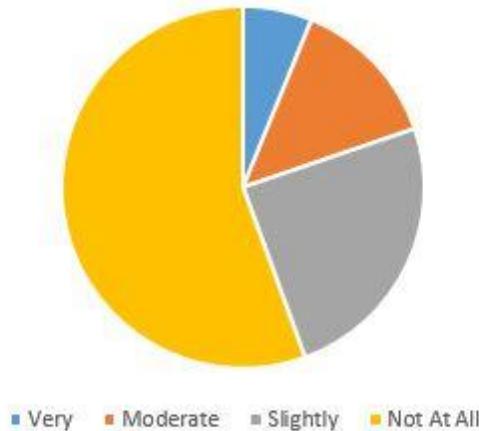


Q: Do you, or would you be willing to, wear technology that measures and tracks...?
 Base: U.S. total sample 2016 n = 2,225; 2018 n = 2,301

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However, we're not quite at a point where physicians are using their patients' wearable-collected data on a significant scale. Our Media Vitals data shows us that doctors are not really interested in tapping this data at this time.

How interested are you in utilizing wearable devices to conduct remote patient monitoring? Source: CMI/Compas Media Vitals

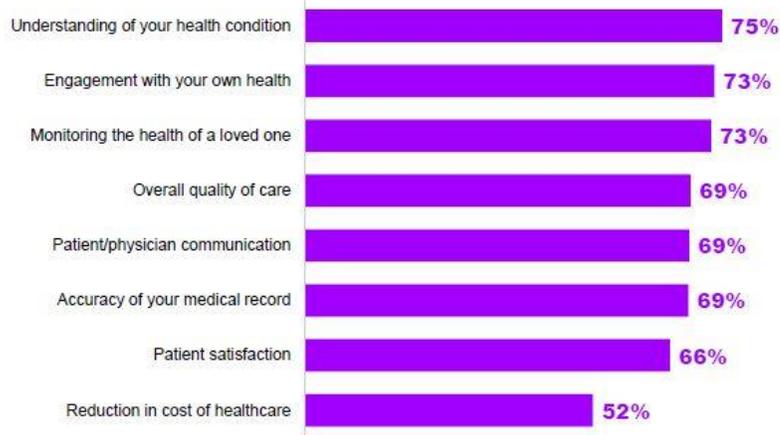


So although the adoption is very good, we don't see a direct application for most pharma brands today. However the wearables space is important to monitor (and at CMI/Compas we continue to do so), particularly because of the massive consumer adoption, as well as continuous growth.

ATTITUDES TO WEARABLE TECHNOLOGY

CONSUMERS AGREE THAT WEARABLES ARE HELPFUL

THOSE WHO AGREE THAT WEARABLES HELP FOR...



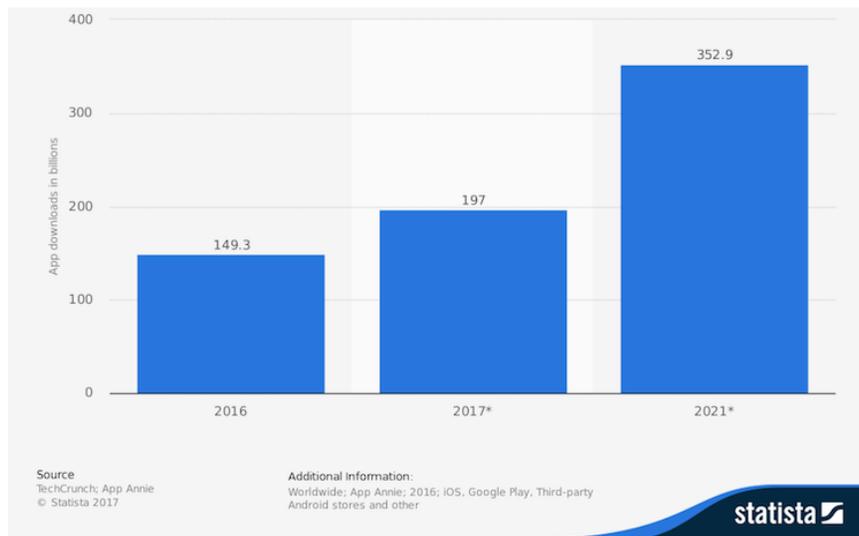
Q: Do you think the use of wearable health devices (for monitoring glucose, heart rate, physical activity, sleep, or weight) helps, hurts, or has no effect on...?
 Base: U.S. total sample 2018 n = 2,301

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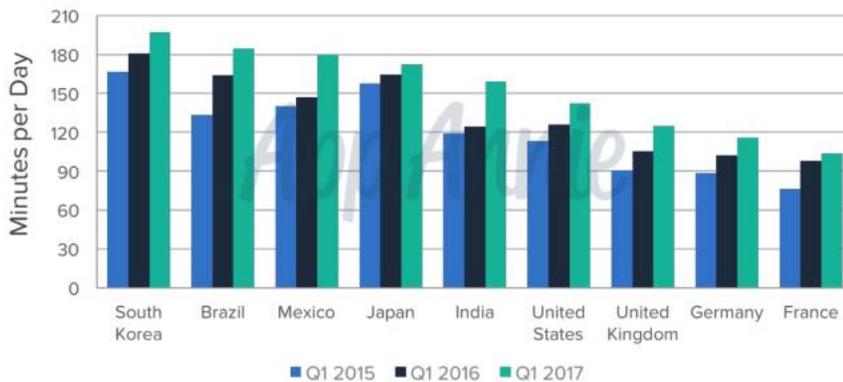
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Apps:

The adoption of apps is extremely high. In 2017, 197 billion – yes, with a B – apps were downloaded. In the US each day people use an average of 9 and spend upwards of 140 minutes on them.



Average Minutes per Day in Apps Android Phone



Apps are used frequently for health, with a [2015 study](#) noting more than half of mobile phone users in the US had downloaded a health-related app. And 68% of HCPs we surveyed in our 2018 Media Vitals research have recommended apps to a patient.

There are several interesting app development and other companies emerging offering ways for pharma to dive into apps. For example [Click Therapeutics](#), a company that presented at Digital Pharma East last month, is building its business around apps as treatment – instead of or in conjunction with pharma. They aim to work well alongside pharma, and have in fact [received \\$17 million](#) in startup funding from Sanofi.

And the opportunities are significant - we highly recommend this as a tactic for most pharma brands. But the challenge is, essentially, value. Many apps are not used once they have been downloaded. Twenty-four percent of app users [abandoned](#) an app after one use. From the [2015 study](#) cited above: “About half of the respondents (427/934, 45.7%) had stopped using some health apps, primarily due to high data entry burden, loss of interest, and hidden costs.” So while we recommend apps as a tactic, that recommendation comes with a strong caveat that the app must provide a clear value to its intended user.

How to ensure your app has value:

- **Listen** – before even beginning to build an app, employ social listening tools to get an understanding of what the need is.
- **Fill the need** – enlist leaders in your core audience (patient advocates, caregivers, HCP KOLs) to test early versions of the app and make sure it’s giving them what they want.
- **Cost** – ideally, your app is free. But that’s not a deal-breaker. Low-cost apps are also popular. The key is to make sure there are no hidden costs. And ultimately, the value of the app should far exceed the cost the user must pay.
- **Ease of use** – this is a must. Test, test, test to make sure it’s easy for anyone to use. Keep it simple.
- **Measurement** – as with any other campaign, make sure to measure and understand how people are using it and which aspects are most successful. Make it easy for users to contact you with suggestions or complaints. Learn from mistakes.
- **Gamify** – don’t just make the app useful, make it beneficial. Offering rewards gives app users even more reason to use your app often.

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