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Innovation, Mobility
and Expanding the Reach
of Healthcare in Latin America

For years, experts have pointed to the healthcare industry as one ripe for disruption. Growing cost burdens, rising chronic diseases and the self-pay nature for much of the medical care in Latin America calls for more consumer-centric and value based innovation such as those promised by mobile health and artificial intelligence.

Perhaps it's no surprise that a Colombian-born digital startup, 1DOC3, recently attracted the attention of Mark Zuckerberg—and subsequently the world—for doing just that.

Mobile penetration & innovation

First, it is worth noting that that increased connectivity to underserved people groups in Latin America is brought by smartphone penetration rates (in contrast to mobile penetration). In Brazil, smartphone penetration leapt from a mere 15% in 2013 to 41% in 2015. At 65%, Chile's smartphone

penetration is not far behind that of the United States (72%). Tablet users across the region are expected to have surpassed 100 million by the end of 2016. This widespread mobile internet access has created a viable new pipeline for service delivery, ushering in fresh business model opportunities.

Innovation in health care services, particularly along the lines of mobile health or "mHealth," holds promises of wider, on-demand, and more personalized access at a lower cost. The business models that are emerging offer value chain efficiencies, easy customer targeted and a more engaged customer experience. Emerging markets like Latin America where urgent needs and cost pressures prevail in a less regulated environment often experience a "leapfrog effect" where disruptive new solutions are offered more quickly and pervasively than in developed countries with costly legacy

SMARTPHONE OWNERSHIP RATES
(% of total population)

Country	2016	2013
Chile	67%	39%
Argentina	57%	34%
Brazil	41%	15%
Mexico	54%	21%
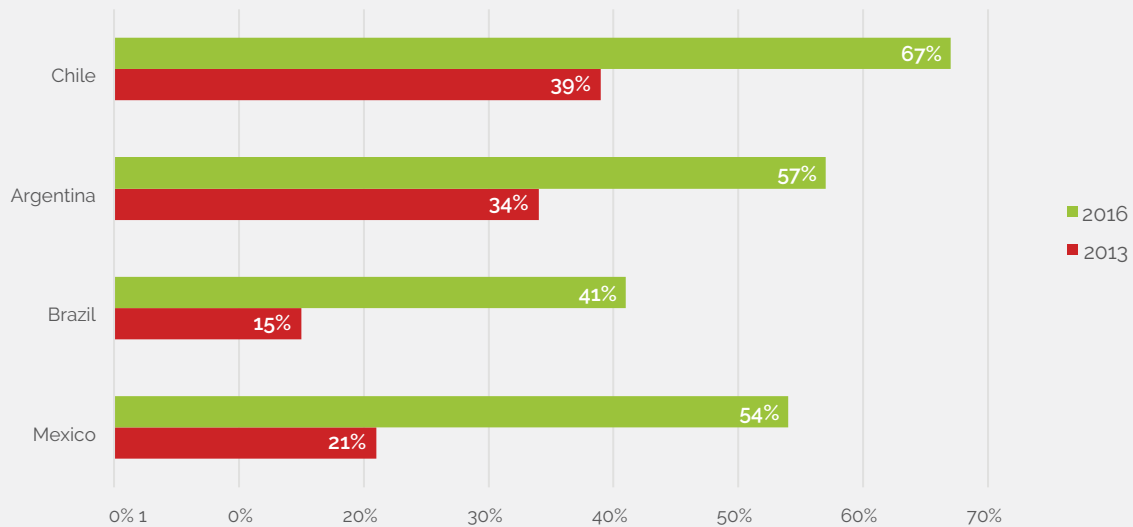
Sources: Pew Research, 2015

healthcare systems and infrastructure. PWC estimates the total mHealth opportunity in Latin America to reach US$1.7 billion in 2017, led by Brazil (45%) and Mexico (33%).

The 1DOC3 digital success story

Global Health Intelligence recently spoke with Javier Cordona, CEO of the Colombian-born online medical platform 1DOC3, to understand how mHealth can expand healthcare access. Their original concept was to create a free online platform where users could submit questions and receive medical advice via their computer, mobile phone or Twitter. They received an astounding 10,000 queries in the first month, which grew to 200,000 by month six. They now have 400,000 followers on social media and are calling it a movement.

Such growth brought problems of scaling cost-effectively as a network of 400 doctors became necessary to field inquiries. 1DOC3 made a bold move to integrate IBM's artificial intelligence service Watson into their platform, powering it with cognitive analytics to deliver targeted content for repeat questions, routing only new requests (less than 1% of queries) to a live medical specialist. Then came a request from tech giant Mark Zuckerberg, who invited 1DOC3 to join Facebook's "internet. org" initiative to bring affordable services to less developed countries. They grant free access for mobile users without smartphones to connect to 1DOC3 for free in Colombia, Mexico, Peru, Panama, Bolivia, Guatemala and El Salvador.

Cordona explains that mHealth services like 1DOC3 can reduce the burden on the public healthcare system significantly. He claims that up to 50% of medical consultations provided by the Ministry of Health in Colombia are for not medically necessary concerns, but rather to obtain information on a health issue because the patient has no other professional resource available, creating unnecessary costs and wait times. 1DOC3 also provides critical information to those who cannot spare the time for a non-emergency doctor visit such as for issues of preventative care. In other cases, 1DOC3 acts as an initial point of care for users who live in remote areas where non-emergency care is too costly for the state to provide.

The anonymity of an online (or mobile) interaction allows users to get critical information on topics important to their personal health that they might not feel comfortable asking a doctor about. Sexual health questions are the top subject area for 1DOC3, comprising about a third of queries and often coming from teenagers looking for basic contraceptive information, suspecting a pregnancy or looking for ways to combat an infection. Another common scenario is that a user recently received instructions from a doctor that they did not understand, so they use the platform to ask for clarification rather than appear ignorant by asking the doctor again.

1DOC3 sees its mission primarily as one of education and access to information. "We need to change the way we treat and exchange medical information, bring it out from behind the walls of the healthcare system – the insurance companies, the hospitals, the doctors," says Cordona. The

company analyzes user questions and runs campaigns on most frequent topics, such as contraceptive awareness. The government has even used the site for public awareness campaigns (such as teenage pregnancy prevention) because of its ability to target the message directly to relevant users as they are actively searching for information – a much better use of tax money than mass advertising. 1DOC3 also gathers and analyzes a wealth of aggregated, anonymized health data that help governments to better target their programs.

Access to preventative information for those at risk for a chronic disease or the ability to reach out to a disease-state community in the wake of a shocking diagnosis are patient needs not typically met within Latin America's overburdened medical system. In some cases, a quick answer from the 1DOC3 platform can save someone from actual harm, such as mixing medications or spreading a sexually transmitted disease. As Cordona surmises, "A platform won't cure cancer, but it can provide the right information, to the right person, at the right time."

Looking ahead: Healthcare delivery models poised for change to broaden access, lower cost.

The case of 1DOC3 and other emerging solutions point to the power of increased connectivity and information access to change the way everyday people manage their health. Latin American consumers are more ready than some might expect to adopt alternative solutions to find faster,

cheaper and more targeted solutions to their health needs. It is striking how a relatively inexpensive solution can provide significant healthcare cost savings to both the individual and the government by unburdening the public health system, while providing an avenue to better connect to its people. Moving forward we should see Latin American governments nurture strategic innovation partnerships with private digital firms as key players in the ecosystem of public healthcare, tasked with hacking their most costly public health challenges.

About Global Health Intelligence

Global Health Intelligence provides detailed information on healthcare infrastructure in emerging markets in order to help clients understand the competitive landscape and identify opportunities for growth.

Founded on over 20 years of research expertise in emerging markets, Global Health Intelligence has developed the world's largest hospital demographics database focused on Latin America.

Find out how Global Health Intelligence can help you grow in emerging markets:

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Our Services

● **Hospital demographics**
The world's largest hospital demographics database focused on Latin America

● **Market size / share**
A unique methodology based on the analysis of import data to deliver reliable insights in a timely manner

● **Tailored research**
Refined with 20+ years Market Intelligence experience:
- Market sizing and segmentation
- Partner search & market due diligence
- Competitive profiling
- Pricing and cost analysis
- Best practices
- Positioning and opportunity identification

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Hospital Database Characteristics

12,000 hospitals profiled

Coverage in 11 countries

Over 100 data points per hospital

Raw data exports to Excel

Integration into your CRM

Prebuilt Tableau dashboards

Available immediately!