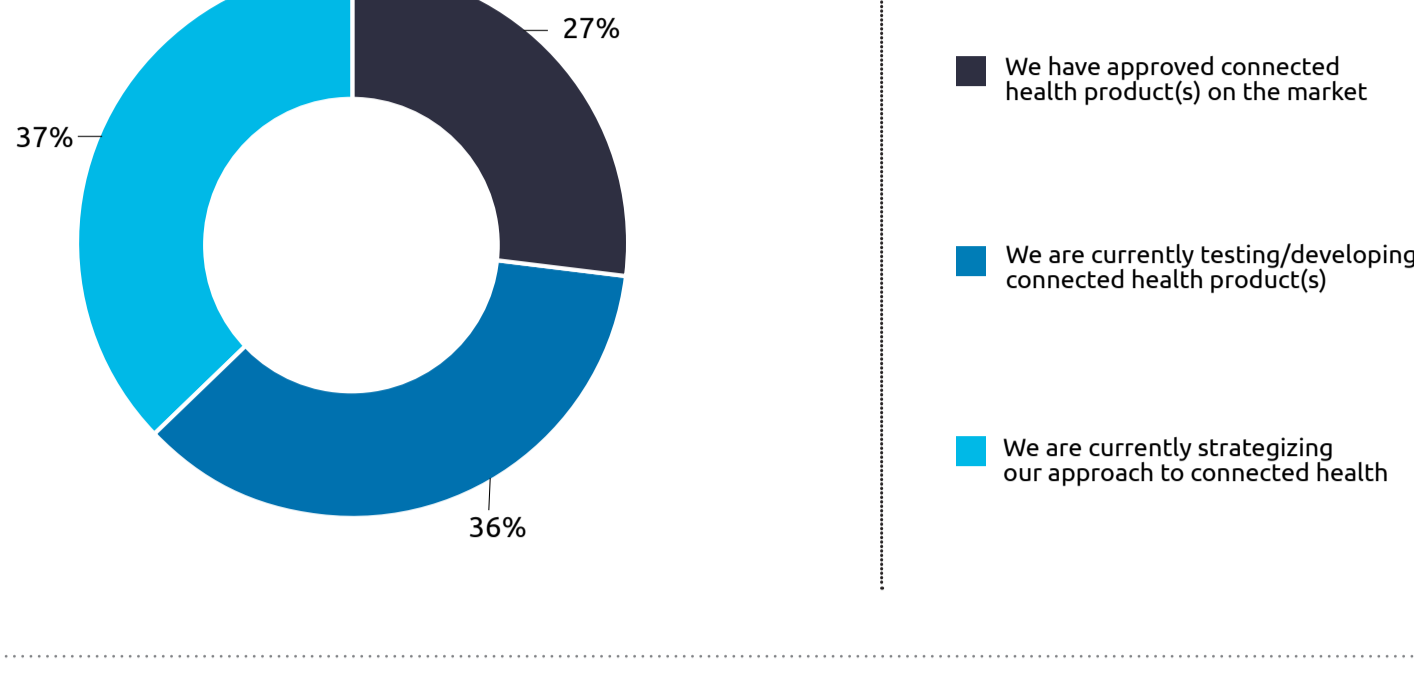


The connected health revolution

Life sciences is betting on connected health

One-quarter of life sciences organizations have an approved connected health product

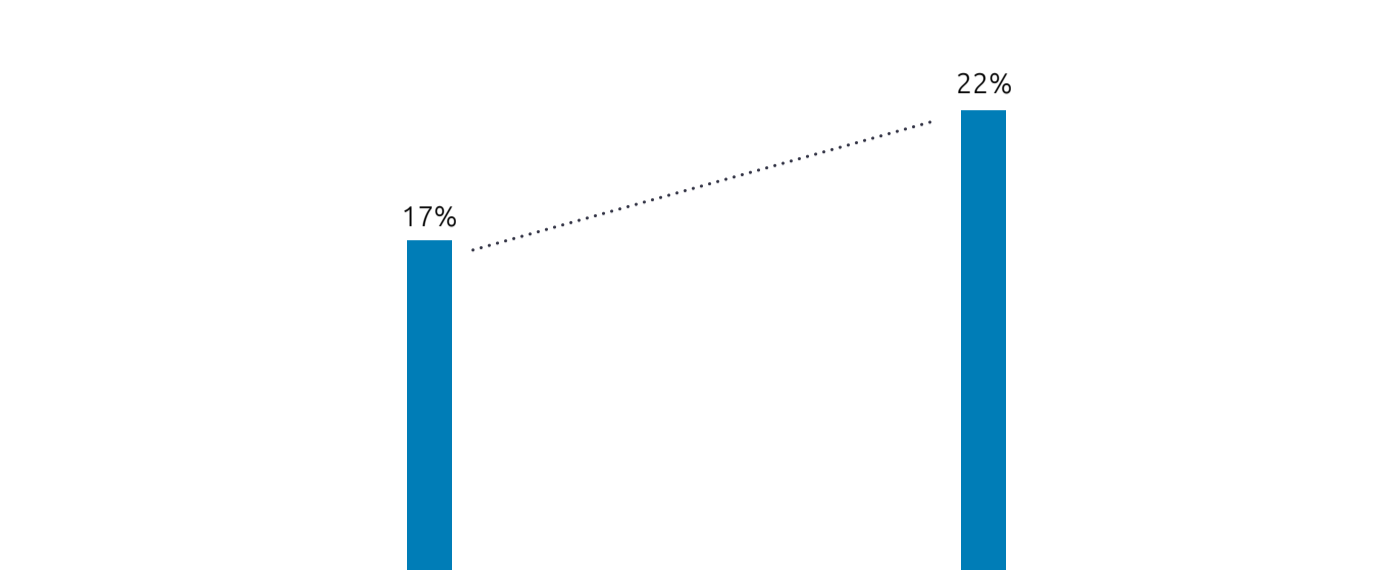
Share of executives who agree with the statements



Source: Capgemini Research Institute, Connected Health Survey, March 2024, N = 420 organizations.

Industry is targeting one-fifth of revenue from connected health in five years' time

Life science industry's revenue from connected health products as a share of total revenue



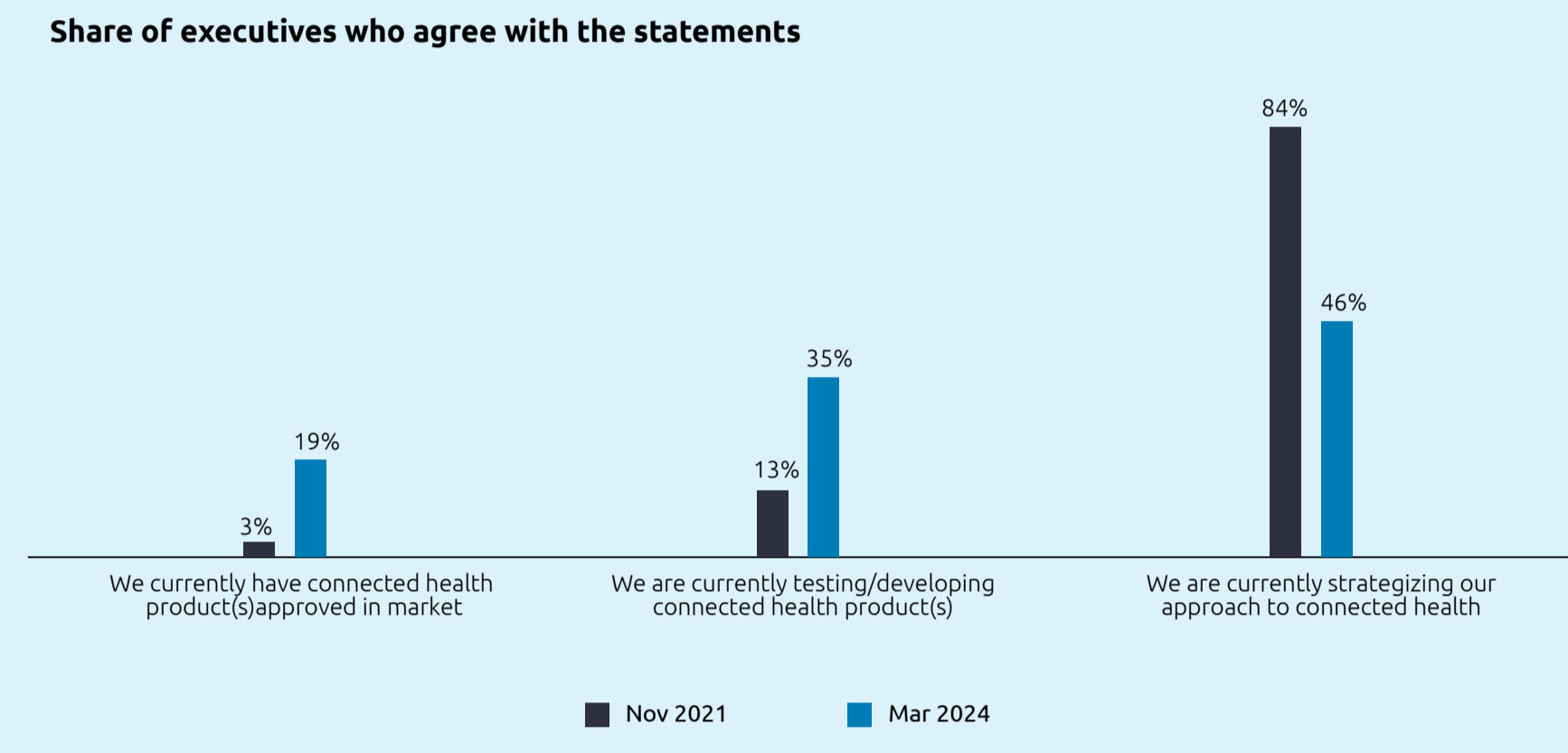
Source: Capgemini Research Institute, Connected Health Survey, March 2024, N = 420 organizations from biopharma and MedTech organizations. * N = 113 respondents from biopharma and MedTech organizations that currently have connected health products on the market. **e stands for expected.

Question asked: Of your organization's total revenue, what is the approximate percentage connected health products represent today? And what is the percentage you estimate they will represent in five years?

Biopharma organizations intensify their focus on connected health

The number of biopharma organizations with market-ready connected health products surged sixfold since 2021

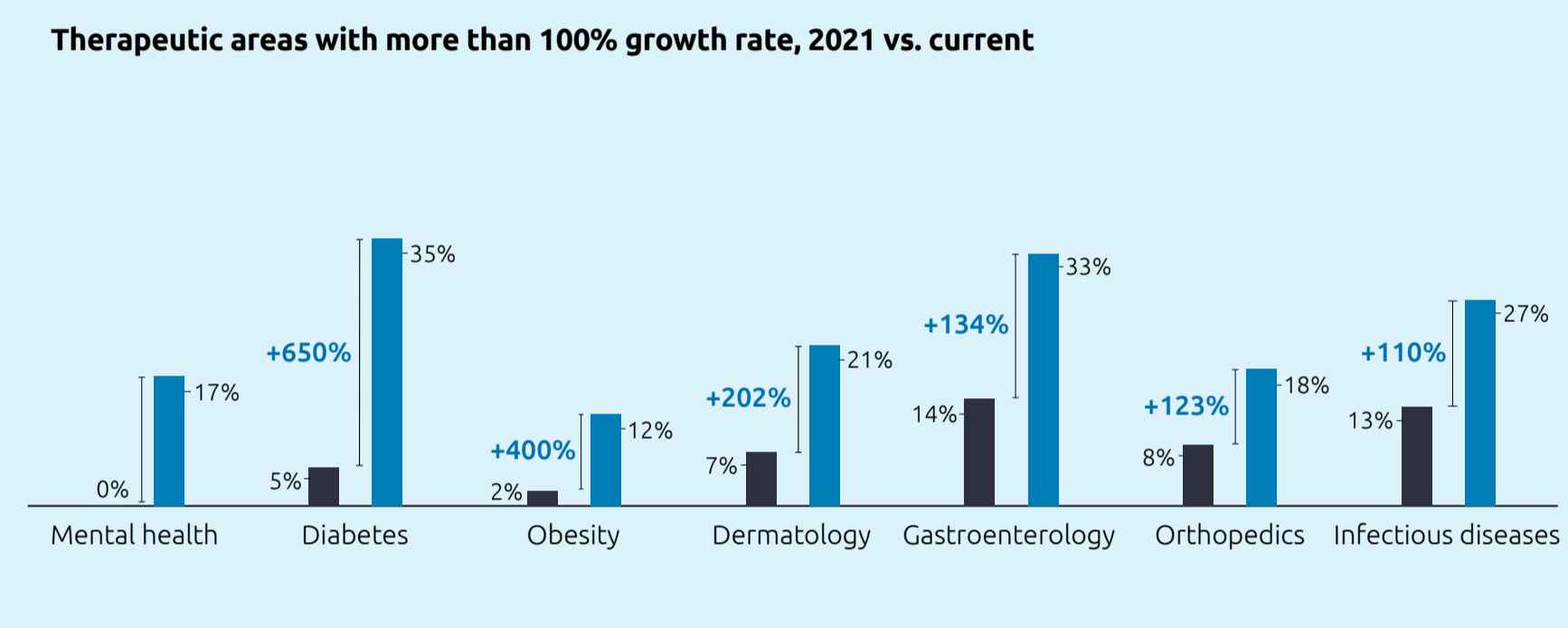
Share of executives who agree with the statements



Source: Capgemini Research Institute, Connected Health Survey, November 2021, N = 523 biopharma respondents; March 2024, N = 252 biopharma respondents. *Despite the differences in the number of organizations surveyed in 2021 and 2024, the sample distribution in terms of geography, revenue size, respondents' job roles, and business functions is similar, making the data comparable.

Mental health and diabetes have gained priority since 2021

Therapeutic areas with more than 100% growth rate, 2021 vs. current

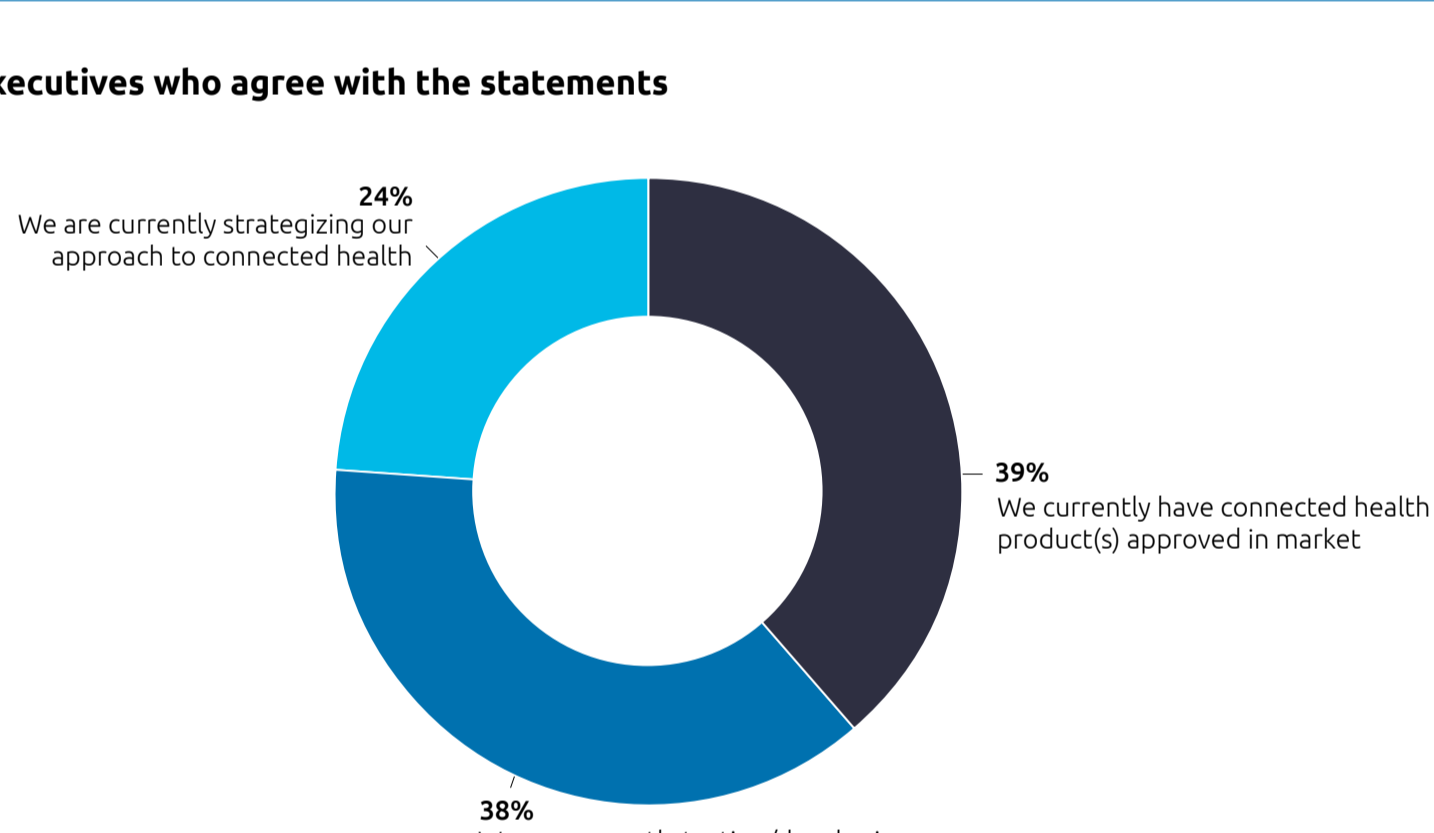


Source: Capgemini Research Institute, Connected Health Survey, November 2021, N = 84 biopharma respondents; March 2024, N = 136 biopharma respondents from organizations that currently have connected health product(s) approved at market or are currently testing/developing connected health product(s). *Despite the differences in the number of organizations surveyed in 2021 and 2024, the sample distribution in terms of geography, revenue size, respondents' job roles, and business functions is similar, making the data comparable.

Connected health is a top priority for a large majority of MedTech organizations

The vast majority of MedTech organizations have connected health products in development or already on the market

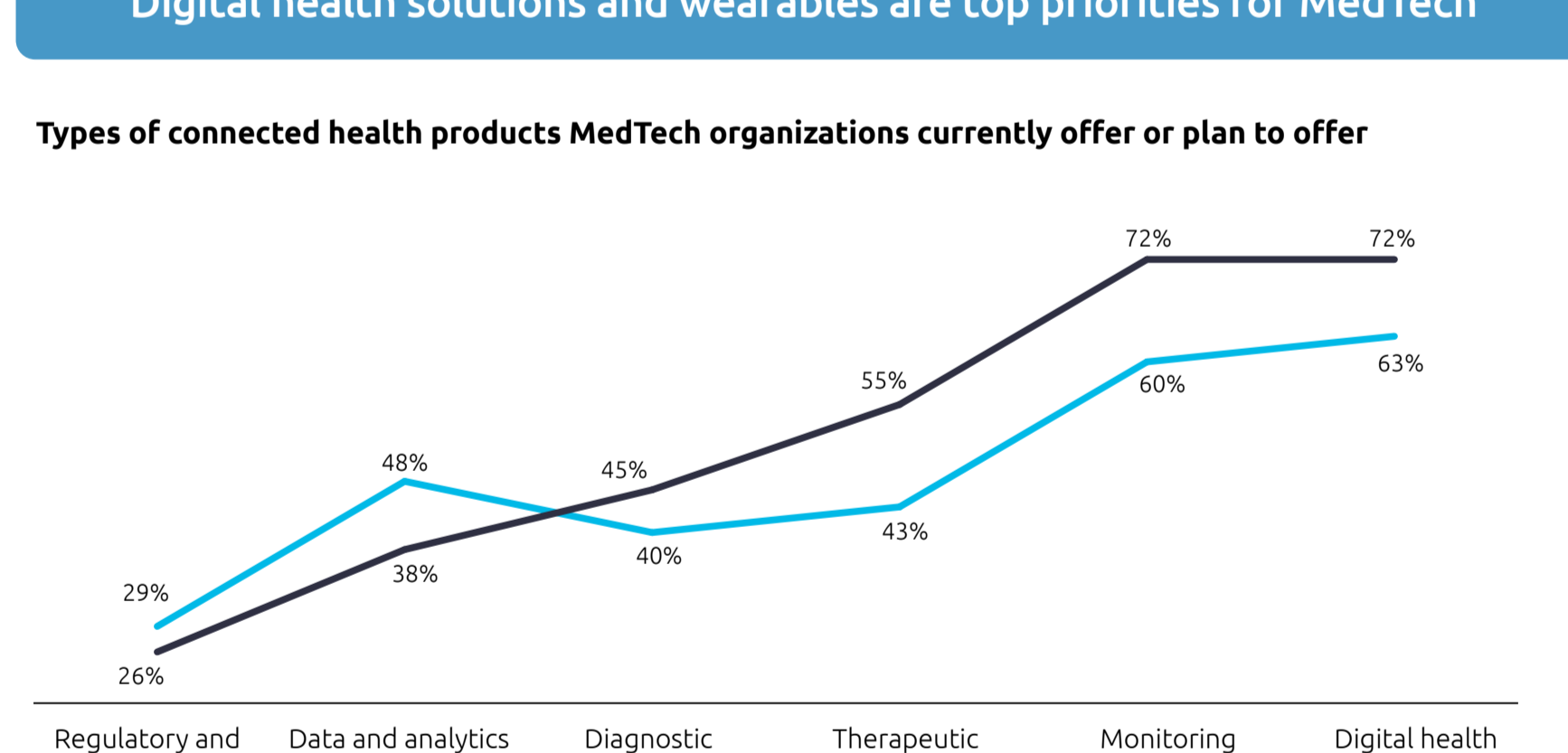
Share of executives who agree with the statements



Source: Capgemini Research Institute, Connected Health Survey, March 2024, N = 168 MedTech organizations.

Digital health solutions and wearables are top priorities for MedTech

Types of connected health products MedTech organizations currently offer or plan to offer

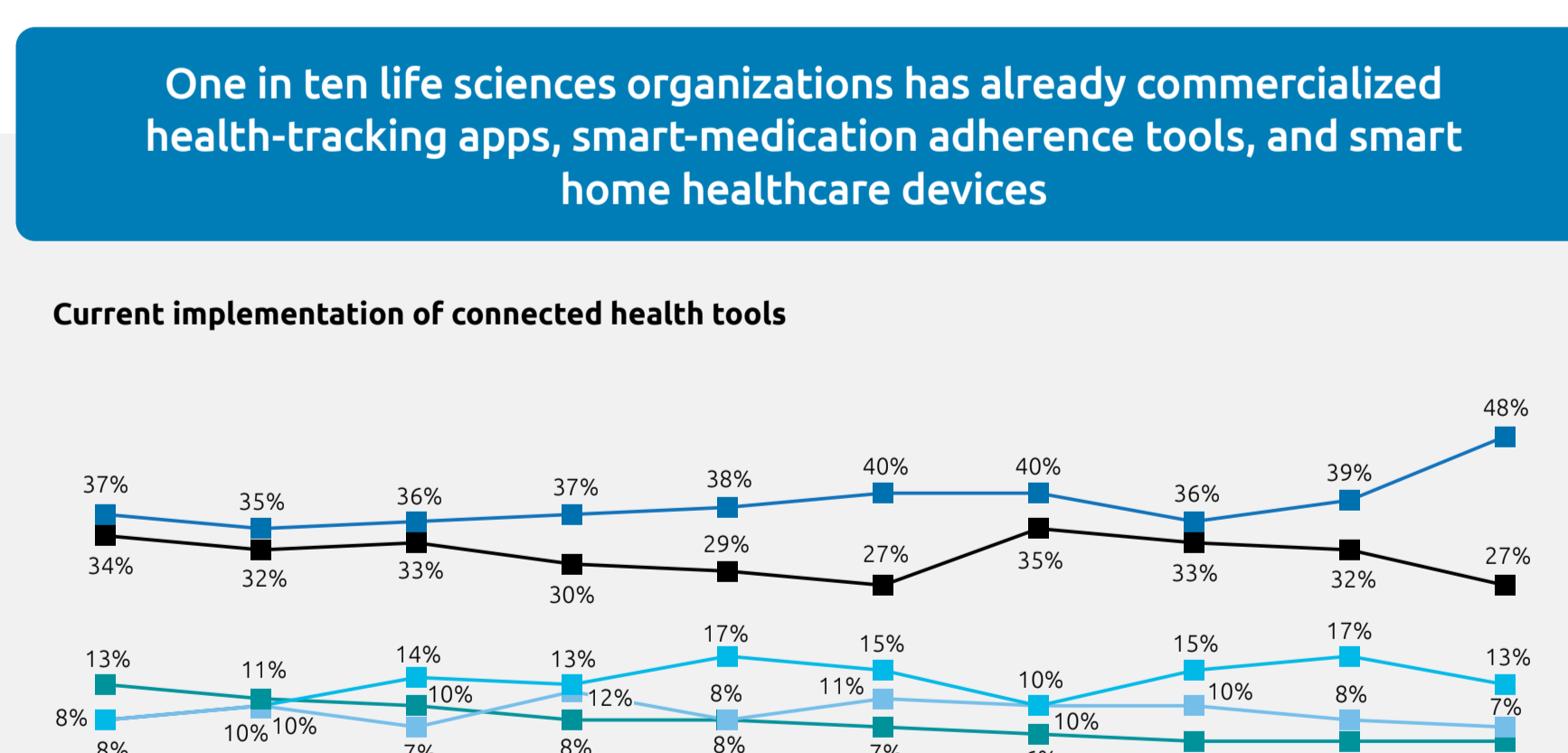


Source: Capgemini Research Institute, Connected Health Survey, March 2024, N = 65 MedTech organizations that currently have connected health products in the market and N = 63 MedTech organizations that are currently testing/developing connected health products.

Implementation of connected health solutions is on the rise

One in ten life sciences organizations has already commercialized health-tracking apps, smart-medication adherence tools, and smart home healthcare devices

Current implementation of connected health tools



Source: Capgemini Research Institute, Connected Health Survey, March 2024, N = 420 biopharma and MedTech organizations. *ePRO devices: Electronic patient-reported outcome devices.

Recommendations for building a connected health portfolio

- Define and articulate your vision and value proposition for connected health
- Design digital product offerings that deliver the proposed value
- Design and develop scalable, secure, and compliant data infrastructure and operations
- Enhance capabilities in digital, engineering, and human-centric design
- Engage with partners, alliances, and early-stage innovators to fill capability gaps
- Take measures to bridge the talent gap
- Establish robust quality assurance processes to ensure regulatory compliance

Source: Capgemini Research Institute analysis.

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