

# UNLOCKING connected health

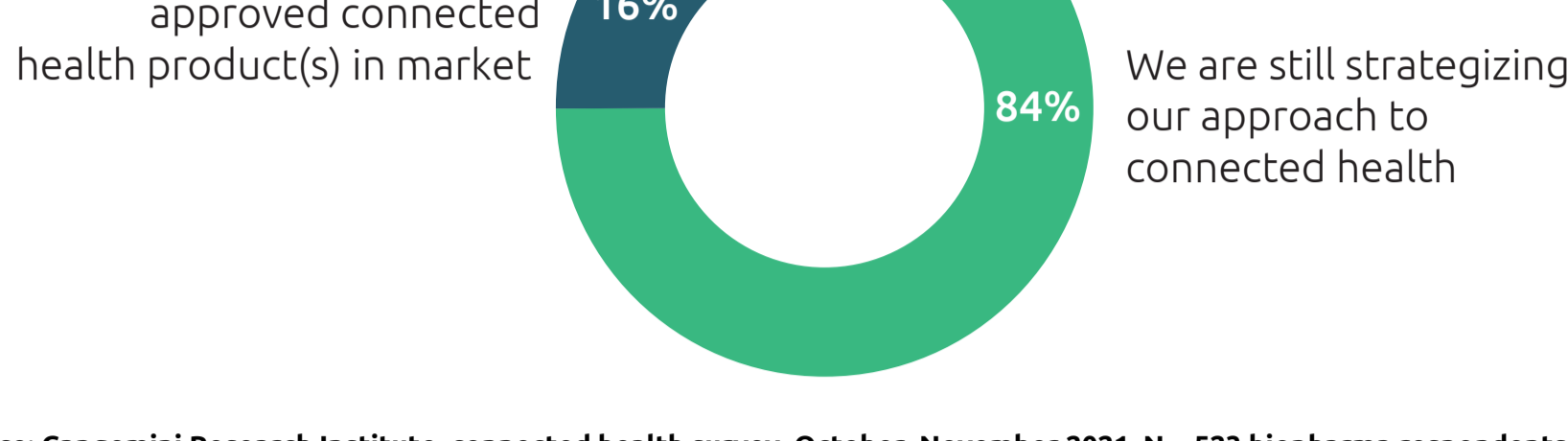
WHY NOW IS THE TIME FOR BIOPHARMA COMPANIES TO TRANSFORM

## THESE ARE STILL EARLY DAYS FOR CONNECTED HEALTH

### Maturity of the connected health enterprise is low

The majority of biopharma companies are still developing their connected health strategy

% of respondents who agree with the statements

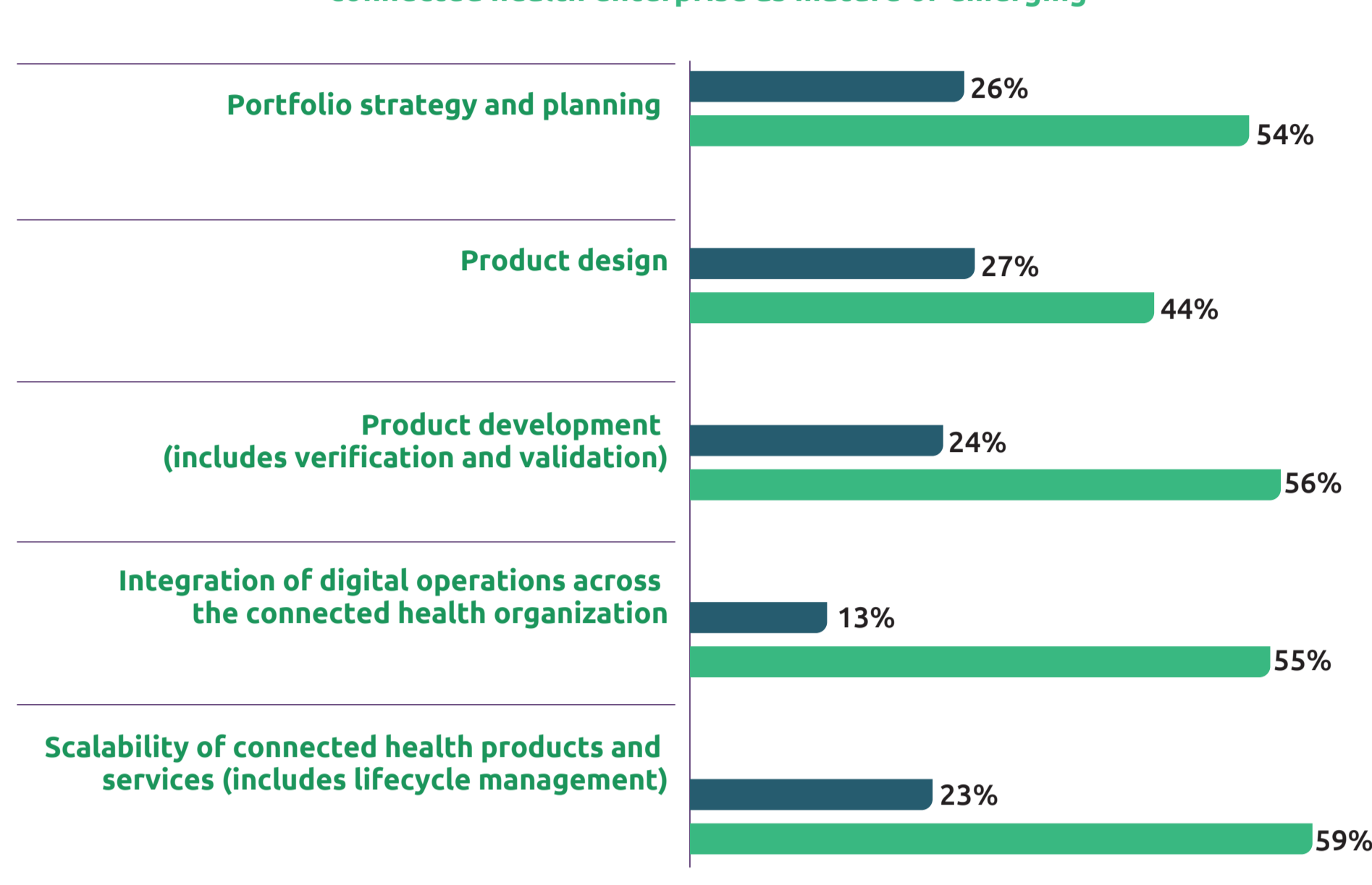


Source: Cappgemini Research Institute, connected health survey, October–November 2021, N = 523 biopharma respondents.

For the purposes of this research, the definition of connected health covers a wide spectrum of digital health products and services, from digital wellness products such as consumer wearables to clinically validated solutions such as digital companions, digital therapeutics (DTx), and combination DTx, including Software-as-a-Medical Device (SaMD).

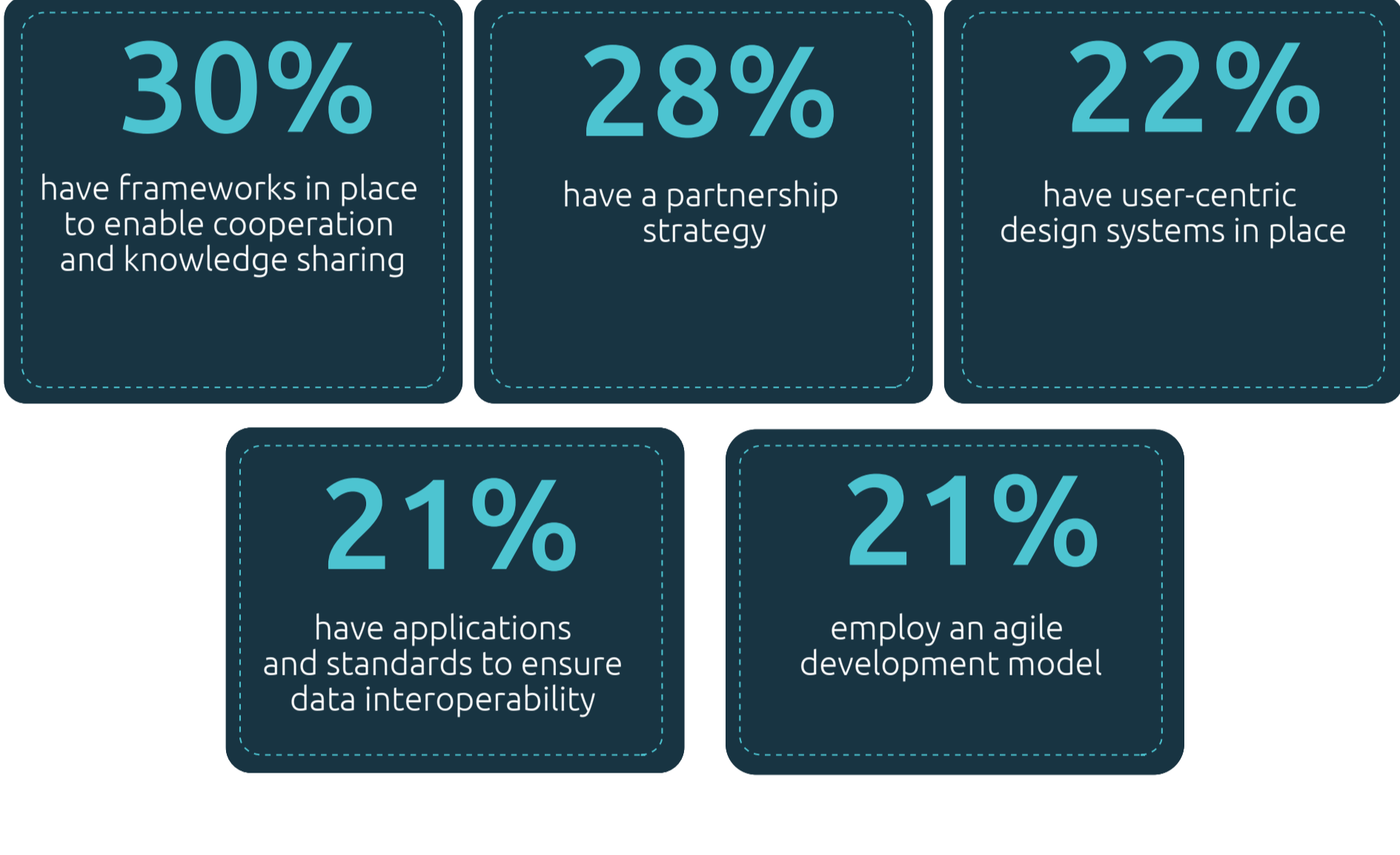
### Roughly a quarter said their organization is mature in portfolio strategy, product design, and product development

% of respondents that define the maturity of their organization's connected health enterprise as mature or emerging



Source: Cappgemini Research Institute, connected health survey, October–November 2021, N = 523 biopharma respondents.

### Digital, technology, and collaboration capabilities are under development



### Most connected health use cases are planned for the next five years

With the exception of a mobile app and remote patient monitoring, **less than 20%** of biopharma executives said their company had developed a proof of concept for any use case the research explored



In the next 5 years:

**54%** are planning to initiate **digital biomarker** applications

**51%** are planning to initiate **AI-enabled predictive diagnostics**

## CHALLENGES MUST BE OVERCOME FOR CONNECTED HEALTH TO FULFILL AMBITIONS

### Security, technology, and regulatory are major roadblocks

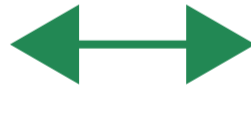
**58%** of biopharma executives said that security vulnerabilities is the top challenge their organizations' face and **48%** said regulatory approval



**8 out of 10** companies do not have a structured process for measuring the success of connected health products

### There is a critical technical skill gap

The skills in most plentiful supply are in softer managerial skills, such as **communications** and **agile product management**



**Augmented/virtual reality, systems thinking and interoperability, engineering, and human-centered design** are the technical skills with the greatest shortage

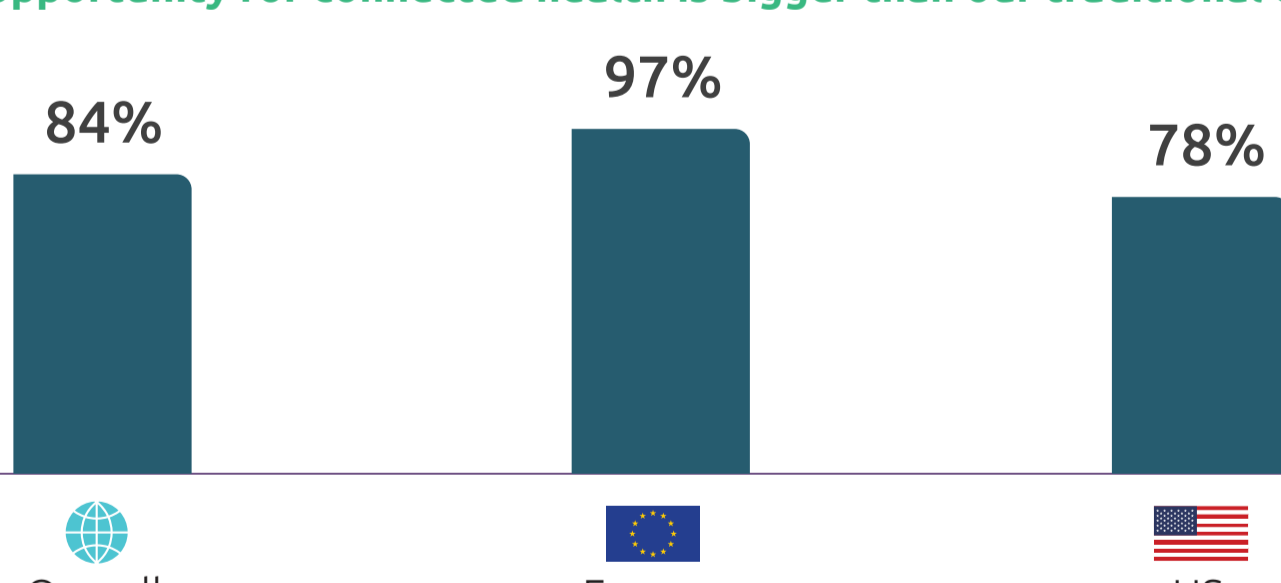
## CONNECTED HEALTH IS SET TO REVOLUTIONIZE HEALTHCARE AND DRIVE BUSINESS VALUE

**99%** of biopharma executives agree that connected health will create **new treatment pathways**, and that it will make healthcare **more personalized and integrated**

### The perceived market opportunity for connected health is extensive

**84%** of biopharma executives said that the opportunity for connected health exceeds that offered by their traditional drug businesses

% of respondents who agree with the statement: "The market opportunity for connected health is bigger than our traditional drug business."



Source: Cappgemini Research Institute, connected health survey, October–November 2021, N = 523 biopharma respondents; N = 281 biopharma respondents in the US; N = 182 biopharma respondents in Europe.

On average, connected health products are projected to represent **13% of total revenue** in five years' time

On average, **59%** of connected health portfolios will be products for the treatment of **existing diseases within current therapeutic areas** in five years' time

Connected health product portfolios are expected to grow by **40% in the next five years**

The top two therapeutic areas for connected health in the next five years are **neuroscience** and **rare diseases**

## HOW BIOPHARMA COMPANIES CAN CLOSE THE MATURITY GAP AND SCALE THEIR CONNECTED HEALTH PORTFOLIOS

- Define a commercial connected health strategy aligned to established portfolio plans
- Design connected health products to drive measurable value and outcomes
- Build a data ecosystem that promotes data sharing and interoperability within, and outside the organization
- Upskill talent in data, behavioral science, and agile development
- Centralize governance, operating model, and financial structures for connected health to drive growth and regulatory coordination
- Build a connected health ecosystem that provides structure and guardrails, but also embraces open innovation

Source: Cappgemini Research Institute analysis.

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