

## **Connected Health could benefit each step of the patient journey, but less than 20% of use cases go beyond proof of concept today**

*Despite high ambitions, only a few life sciences organizations have the digital, technical and collaborative capabilities required to realize connected health, opening the door for big tech players to move in*

**Paris, March 23, 2022 – The number of approved connected health<sup>1</sup> offerings are expected to grow by 40% in the next five years given their strong potential for increased patient engagement, new treatment possibilities, and early diagnosis and detection of diseases. Still only 16% of life sciences companies<sup>2</sup> are currently either testing, or have approved connected health products in the market. Overall maturity in connected health for most organizations is only 'emerging.' This is according to the latest [Capgemini Research Institute](#) report, [Unlocking the Value in Connected Health](#), which details the main therapeutic areas where connected health could reap significant patient benefits, and the barriers life sciences organizations must overcome to achieve them.**

According to the report, the top therapeutic areas for future connected health products in the next five years include neuroscience-related diseases, such as multiple sclerosis, Alzheimer's, and epilepsy, followed by rare diseases, and immunology. To realize this, more than 50% of life sciences organizations are planning to develop use cases in the next five years for remote patient monitoring, digital biomarker applications (e.g., wearable biosensors), and AI-enabled predictive diagnostics and preventive medicine.

However, the industry is still a long way from realizing these kinds of use cases, and only a quarter of life sciences organizations surveyed are mature in key connected health areas, such as portfolio strategy, product design, and product development. The research also found that less than a third of organizations have the digital, technological, and collaborative capabilities needed for successful connected health initiatives. For instance, only a quarter utilize artificial intelligence to run predictive analysis on real-time data from connected health products. Fewer still (21%) have a Center for Excellence to drive innovation, synergies, and best practices in their connected health offerings.

Olivier Zitoun, Global Life Sciences Industry Lead at Capgemini says, *"The demand and the opportunity for improved patient outcomes is there today, and a number of technologies hold the promise to revolutionize treatment pathways and patients' interactions with healthcare providers. To reap the benefits of digital health technologies, organizations will need to address the skills, technology, and structural gaps in order to build a scalable, personalized, and integrated Connected Health portfolio. Larger life sciences organizations show more promising signs of maturity, but with big tech players also eyeing up the potential, the market as a whole needs to be pushing forward at the same pace."*

Organizations that do have the requisite connected health maturity, and subsequently are beyond the strategy phase, are overwhelmingly the larger businesses. Nearly half of life sciences organizations with

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<sup>1</sup>For the purpose 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).

<sup>2</sup> The research covers biotechnology and pharmaceutical (biopharma) organizations.



more than \$20 billion in revenue said they are mature in portfolio strategy and planning compared to only 17% of companies with less than \$1 billion.

The reasons behind this discrepancy are manifold, but largely come down to bigger businesses' greater ability to overcome the two major challenges of developing and scaling connected health: security vulnerabilities and regulatory approval.

According to the report, smaller life sciences organizations are playing catch-up, and the reasons behind their lack of maturity could well be down to a discrepancy in the perception between technology and business executives of the skills available in the company. For instance, close to half of those in business roles believe the connected health enterprise has adequate skills in augmented and virtual reality, whereas only 20% of tech personnel agree. Augmented/virtual reality, systems thinking and interoperability, engineering, and human-centered design are the top technical skills with the greatest shortage.

To increase connected health maturity and expedite development of use cases Capgemini has identified six critical focus areas:

- 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 innovations

To read the full report, [click here](#).

### **Methodology**

Capgemini surveyed 523 executives, manager-level and above (representing 166 companies) from life sciences organizations in the pharmaceutical and biotechnology sectors across seven countries in North America, Europe, and Asia. Respondents must have indicated that their company is currently strategizing its approach to connected health; currently testing/developing connected health product(s); and/or currently have connected health product(s) approved and in market. The global survey took place in October and November 2021. In addition, Capgemini conducted in-depth interviews with 10 senior executives at leading global biopharma companies.

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