



Digital Health

12%

Health industry
contribution to world
GDP in 2022¹

USD 1.3_{BN}

Estimated size of the
healthcare digitalisation
business by 2030²

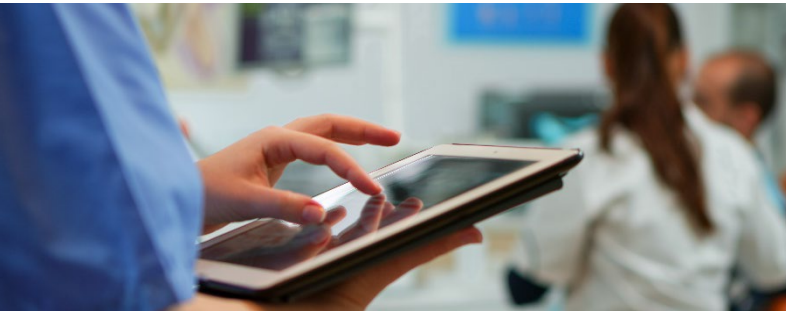
23.7%²

Compound annual
growth rate³

¹ Source: Bellevue AM, March 2023

² Source: Market Research Future (MRFR): "Digital Health Market Information By Technology, Application, Delivery Mode, Components, End User and Region - Forecast till 2030".

³ CAGR. Projection period: 2022-2030. The market was estimated to be worth USD 167bn in 2021.



Digital health pursues efficiency in the healthcare system to provide appropriate high-quality care to a growing global population.

Digital Health - What it means

Digital Health is a term used to describe the set of new solutions for the healthcare sector arising from the **convergence of technology and medicine**. It is a broad, multidisciplinary concept that includes many categories, from the Internet of Things to conventional connectivity solutions, and other newer ones such as robotics in surgery, telemedicine and blood glucose monitoring.

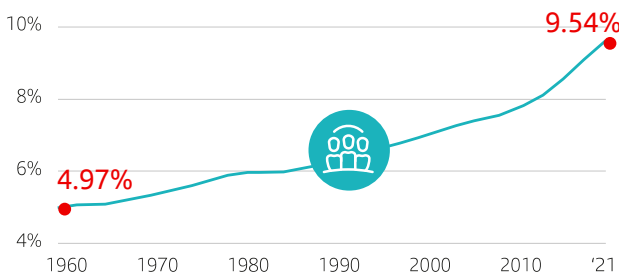
It offers a range of services that enable customers to **manage chronic disease** and obtain **early diagnosis**.

Why now?

The main drivers of growth in the global eHealth market include demographic factors such as an **ageing population** that is more prone to disease, and an increase in the **number of people suffering from chronic disease**.

Demographics

Percentage of the world's population aged over 65



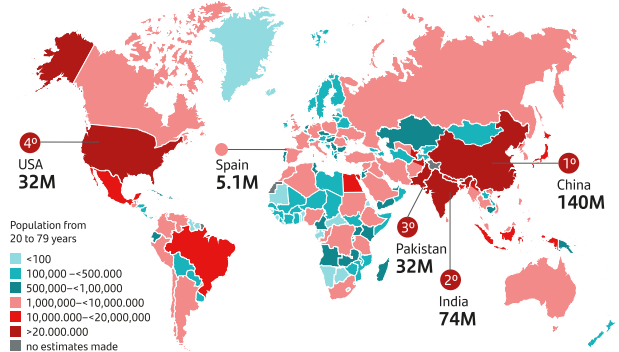
According to the World Bank, 9.54% of the world's population were aged 65 and over in 2021. **That percentage has almost doubled in the last six decades.** In absolute terms, this age group **grew from 150 million in 1960 to 747 million in 2021.**

Other key factors that are influencing the expansion of the digital medical sector are the **increasing adoption of smartphones, improved Internet connectivity** thanks to the deployment of 4G/5G, **advances in healthcare IT infrastructure**, the **growing need to control healthcare costs**, and the **development of technology for the medical sector.**

Lifestyle changes

World population with diabetes

Source: IDF Diabetes Atlas 2021



In the Diabetes Atlas 2021, the International Diabetes Federation (IDF) estimated that there are **537 million adults with diabetes worldwide**; this is **an increase of 16%** (74 million) from the IDF's previous estimates in 2019. It projects an increase worldwide, especially in Asia.

Moreover, **the COVID-19 epidemic** had a crippling effect on the healthcare industry. The main companies have been working hard to strengthen their supply chains and accelerate operations to reduce losses. In addition, social distancing drove patients to seek **remote medical consultations**, reinforcing the need for digital healthcare. As a result of the pandemic, more and more medical professionals are offering consultations via videoconference or telephone.

Improving the efficiency of the healthcare sector

New technology standards are changing healthcare systems to achieve better care at a lower cost

Telemedicine

This system allows remote consultations, which saves time, costs and travel for both physicians and patients. In the long run, it facilitates treatment continuity, optimises healthcare resources and improves health management.

Apps

Health-focused mobile applications improve lifestyle habits and facilitate disease management by providing health information, medication control systems that improve adherence to treatment, as well as mechanisms for monitoring symptoms and logging medical data to facilitate self-care.

Electronic medical records

Digitalising medical records enables the information to be centralised, so that the patient can share it securely and medical staff can access it at any time.

Wearables

Smart accessories, such as activity wristbands, glasses and even clothing, are already capable of monitoring physiological variables such as heart rate and blood oxygen level, to track our physical condition.

Augmented reality

This technology makes it possible to view organs in 3D, view the patient's test results in real time and plan surgery. It is also used in training healthcare professionals, in rehabilitating patients and in treating psychological disorders such as phobias.

Big data and artificial intelligence

Both technologies are used to process the immense amount of data produced by the healthcare sector in order to detect risk factors, perform predictive analysis for early diagnosis, better understand disease progress and test the efficacy of techniques and treatments. They also make it possible to detect patterns and anomalies in healthcare services, and to identify situations that tend to generate complaints.

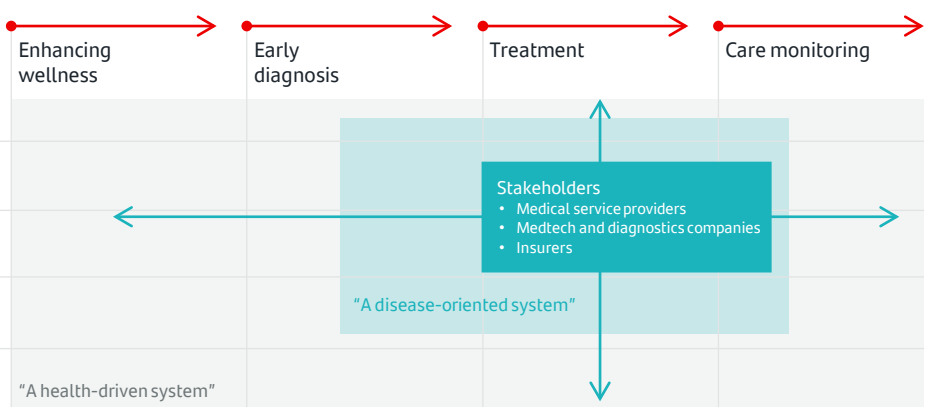
End-to-end process optimisation is replacing isolated approaches

Source BCG, Bellevue AM

Groundbreaking technologies

- Sensors (mechatronics)
- Smartphone and IoT (connectivity)
- Cloud (availability)
- Big data applications (algorithms)
- Disruptive business models (integration)

Integrated solutions: expansion into up-and downstream areas of activity



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