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DIGITAL HEALTH TECHNOLOGY TRENDS

*A Survey of Digital Healthcare
Decision-Makers*

SEPTEMBER 2021

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INTRODUCTION

Healthcare has been historically slow to adopt change, but the pandemic has tested every assumption, system and solution in the industry. Both disruptive and transformative, COVID-19 fast-tracked healthcare trends that have been primed and ready for more extensive roll-out for the last few years.

Digital health connects and empowers people and populations to manage health and wellness in ways that are quantifiable, cost-effective and convenient. Today in healthcare, we are triaged and treated differently, and if something can be done remotely, or through a sensor with digital connectivity, it's being embraced with much more urgency than ever before.

Digital capabilities are now built into a wide range of healthcare devices, from diagnostics and medical imaging machines to surgical instruments and orthopedics. All these connected devices generate a continuous stream of health data purposed for patient support, predicting or preventing poor outcomes and otherwise curating perspective for greater therapy insights and improved health.

People are living longer; chronic health issues diminish too many people's quality of life; adequately trained healthcare workers are in limited supply, stressing physician workloads; escalating costs are squeezing patients, payers and providers alike. The market is rewarding those who can deliver healthy outcomes—a potent

force driving the ramp up in adoption of digital health's innovative technologies.

Gaining insight and understanding of the current state of digital health is critical for being able to navigate through its continuing evolution. That's why we partnered with SIS Research International to survey 210 individuals with decision-making responsibility at leading healthcare companies with existing or planned digital healthcare solutions.

While the participant base has shifted over the years, this year's survey features a significantly more diverse group across regions. Therefore we've only provided year-over-year data where appropriate. Still, this year's report delivers insights into the current and future trends of companies engaging in this exciting and dynamic market.

KEY FINDINGS

STATE OF DIGITAL HEALTH SOLUTIONS

- **51%** of digital healthcare solutions are in the development or testing/verification phases
- **38%** of pharmaceutical equipment solutions are in the testing and validation phase—more than any other solution category
- Certification bottlenecking is highest for in-body devices
- **64%** are either testing a prototype with users or have only delivered to select users
- **50%** say their product development and launch cycles for digital health solutions are less than 18 months
- More than **four in 10** digital healthcare solution providers say their lifetime revenue is higher because they can sell in a subscription model

KEY FINDINGS

DIGITAL HEALTH DEVICE MANUFACTURING CHALLENGES

- Regulatory processes and technology issues are the most frequently cited reason behind slow development and delivery of digital health solutions
- Industry hurdles vary by region: Participants in North America affirm payment responsibility or reimbursement is the biggest challenge; Europe grapples with technology issues; APAC is working through data concerns; LATAM is struggling with privacy concerns
- The biggest manufacturing challenge is that enabling technology needs to evolve; **55%** affirm this finding
- Participants from LATAM state that they face the worst manufacturing challenges, with **100%** affirming they face challenges, compared to **68%** in APAC and Europe
- **43%** affirm that consumer adoption concerns are the biggest barrier to delivering digital health solutions
- **93%** have explored or implemented organizational changes to support their digital healthcare solutions
- Only **34%** describe their company as fully capable of delivering digital healthcare solutions; **39%** have a plan to be fully capable they are working on

KEY FINDINGS

EMERGING BUSINESS MODELS IN HEALTHCARE

- **69%** are considering or already leveraging value-based care models
- **43%** are seriously considering their options to use the data they collect through devices to create additional revenue streams
- Nearly **three in 10** say they are already building personalized healthcare capabilities into their solutions
- **90%** agree that consumers are still the driving force behind innovation in healthcare
- **92%** agree that healthcare manufacturing companies need to act more like consumer technology companies
- **44%** think manufacturing companies with healthcare expertise will lead innovation in the digital health industry
- Digital healthcare solution providers are still split on interoperability approaches
- **97%** report they would look to external partners in overcoming challenges in IoT, connectivity and interoperability
- **63%** say they expect their manufacturing partners to deliver capabilities to help them build new solutions



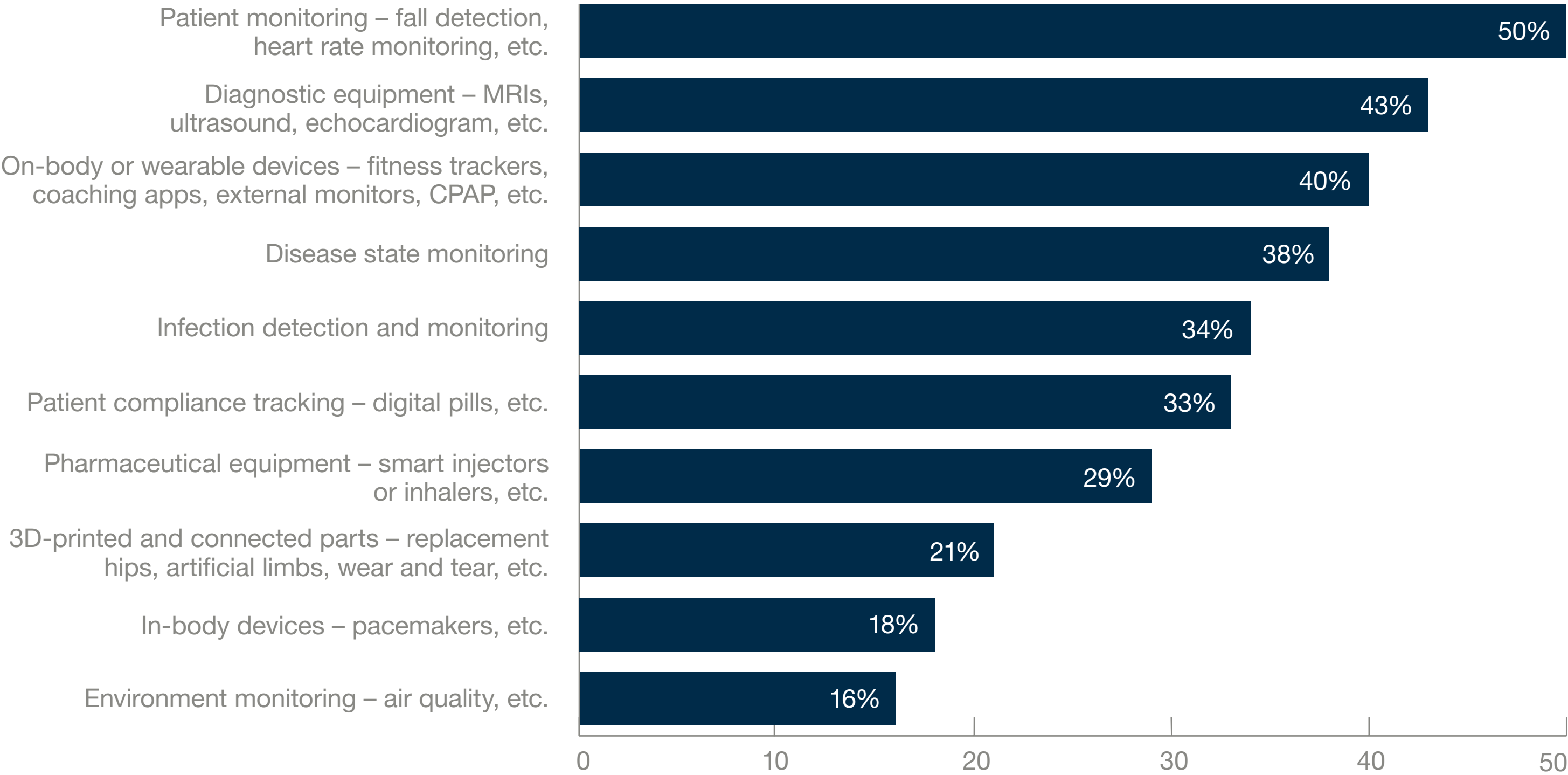
STATE OF DIGITAL HEALTH SOLUTIONS

DIVERSE RANGE OF DIGITAL HEALTH SOLUTIONS ARE IN DEVELOPMENT

One of the clearest areas of excitement now and into the future is the sector of healthcare products referred to as wearables. These are devices, like fitness trackers, heart monitors and other devices which record in real-time and communicate biometric data either directly to the user or to a connected platform for a variety of purposes, including coaching, intervention, analysis and even within clinical trials administration.

Aligned with these trends, the top three solution categories providers are developing or plan to develop are in patient monitoring, diagnostic equipment and on-body or wearable devices.

What type of digital healthcare solutions does your company develop or plan to develop?
Choose all that apply.

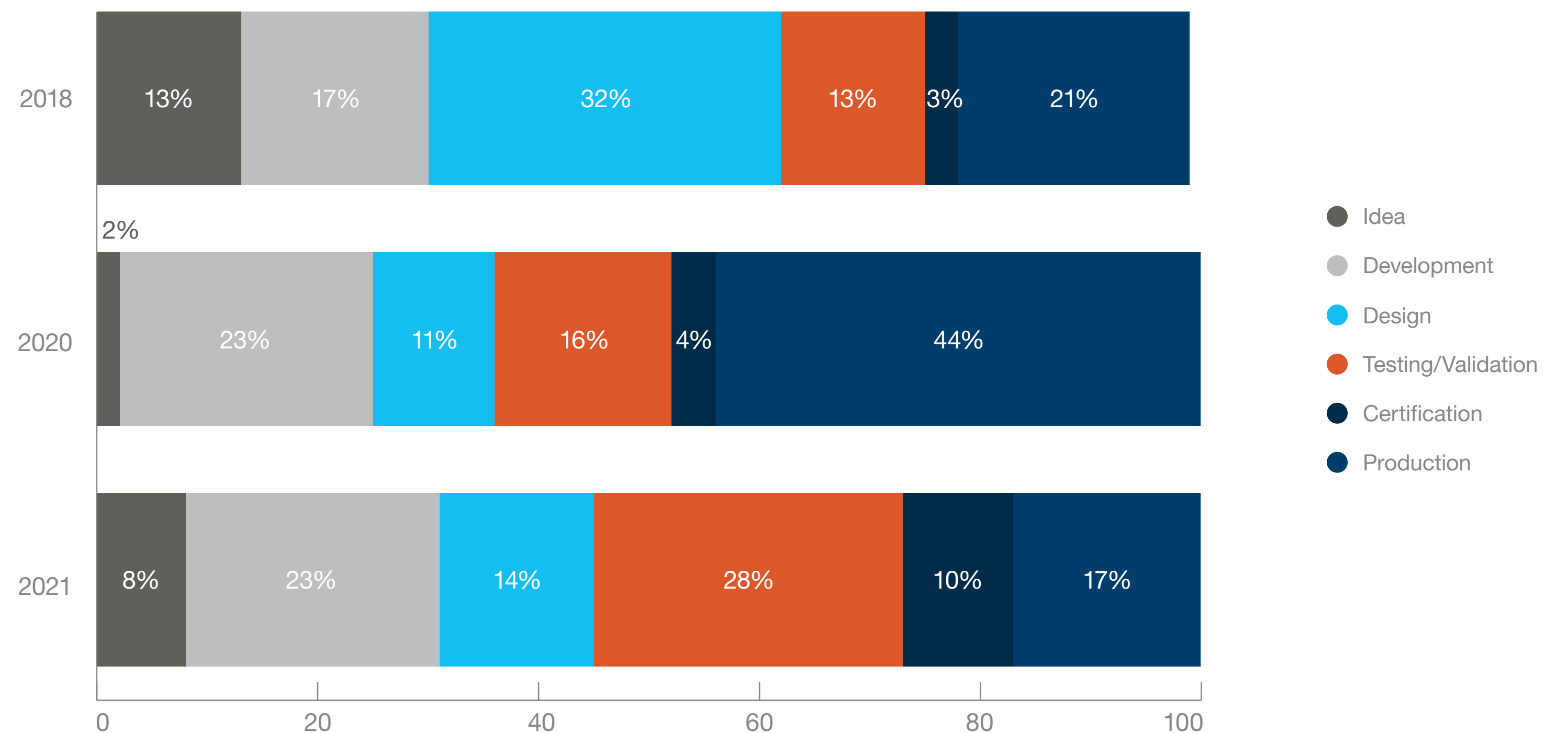


THE BULK OF PROJECTS ARE IN THE DEVELOPMENT OR TESTING PHASES

Digital healthcare solutions in the development phase have stayed consistent, and nearly 30% are currently in the testing/validation phase. While the number of solutions in production are lower than previous years, this can be attributed to changes in the participant profile. The breakdown of solutions and geographical spread are distributed differently in this survey, compared to prior years.

**Some numbers may not add up to 100% due to rounding*

What is the status of your company's development of digital healthcare solutions?



PHARMACEUTICAL DEVICES AND PATIENT TRACKING MOST LIKELY TO BE IN TESTING

Pharmaceutical devices and patient tracking have the highest number of projects in the testing and validation phase. This highlights the importance of these technologies and supports the hypothesis that they are the quickest digital healthcare projects to deploy.

Certification bottlenecking is highest for in-body devices, such as pacemakers and infection detection devices. Due to the nature of these devices, regulatory approvals can take longer.

**Some numbers may not add up to 100% due to rounding*

What is the status of your company's development of digital healthcare solutions? (By Solution Type)

	Idea	Design	Development	Testing/ Validation	Certification	Production
On-body or wearable devices – fitness trackers, external monitors, CPAP, etc.	13%	18%	23%	26%	10%	11%
In-body devices – pacemakers, etc.	11%	11%	21%	24%	21%	13%
Environment monitoring – air quality, etc.	0%	21%	24%	21%	15%	13%
Patient compliance tracking – digital pills, etc.	6%	7%	31%	33%	7%	16%
Patient monitoring – fall detection, heart rate monitoring, etc.	8%	15%	25%	27%	6%	19%
Disease state monitoring	10%	23%	28%	21%	4%	15%
Infection detection and monitoring	7%	8%	20%	30%	17%	18%
Diagnostic equipment – MRIs, ultrasound, echocardiogram, etc.	8%	16%	20%	28%	13%	16%
Pharmaceutical equipment – smart injectors or inhalers, etc.	0%	11%	30%	38%	15%	7%
3D printed and connected parts – replacement hips, artificial limbs, wear and tear, etc.	0%	13%	24%	31%	13%	18%

MOST DIGITAL HEALTH SOLUTIONS ARE WITH SELECT USERS

Most digital health solutions are either in testing with select users or delivered to select users, with pharmaceutical equipment and diagnostic equipment most likely to be delivered to select users only.

**Some numbers may not add up to 100% due to rounding*

What is the status of your company's digital healthcare solution delivery to customers?

Type of digital healthcare solutions	● Highest ● Lowest			
	Fully launched to our users	Delivered to select users only	Testing a prototype with users (e.g. clinical trial)	We have not yet delivered any product to users
On-body or wearable devices – fitness trackers, external monitors, CPAP, etc.	13%	33%	38%	15%
In-body devices – pacemakers, etc.	21%	18%	42%	18%
Environment monitoring – air quality, etc.	15%	33%	42%	9%
Patient compliance tracking – digital pills, etc.	9%	31%	46%	14%
Patient monitoring – fall detection, heart rate monitoring, etc.	16%	29%	36%	19%
Disease state monitoring	14%	25%	39%	23%
Infection detection and monitoring	23%	24%	31%	23%
Diagnostic equipment – MRIs, ultrasound, echocardiogram, etc.	17%	41%	28%	14%
Pharmaceutical equipment – smart injectors or inhalers, etc.	16%	48%	31%	5%
3D printed and connected parts – replacement hips, artificial limbs, wear and tear, etc.	24%	38%	33%	4%

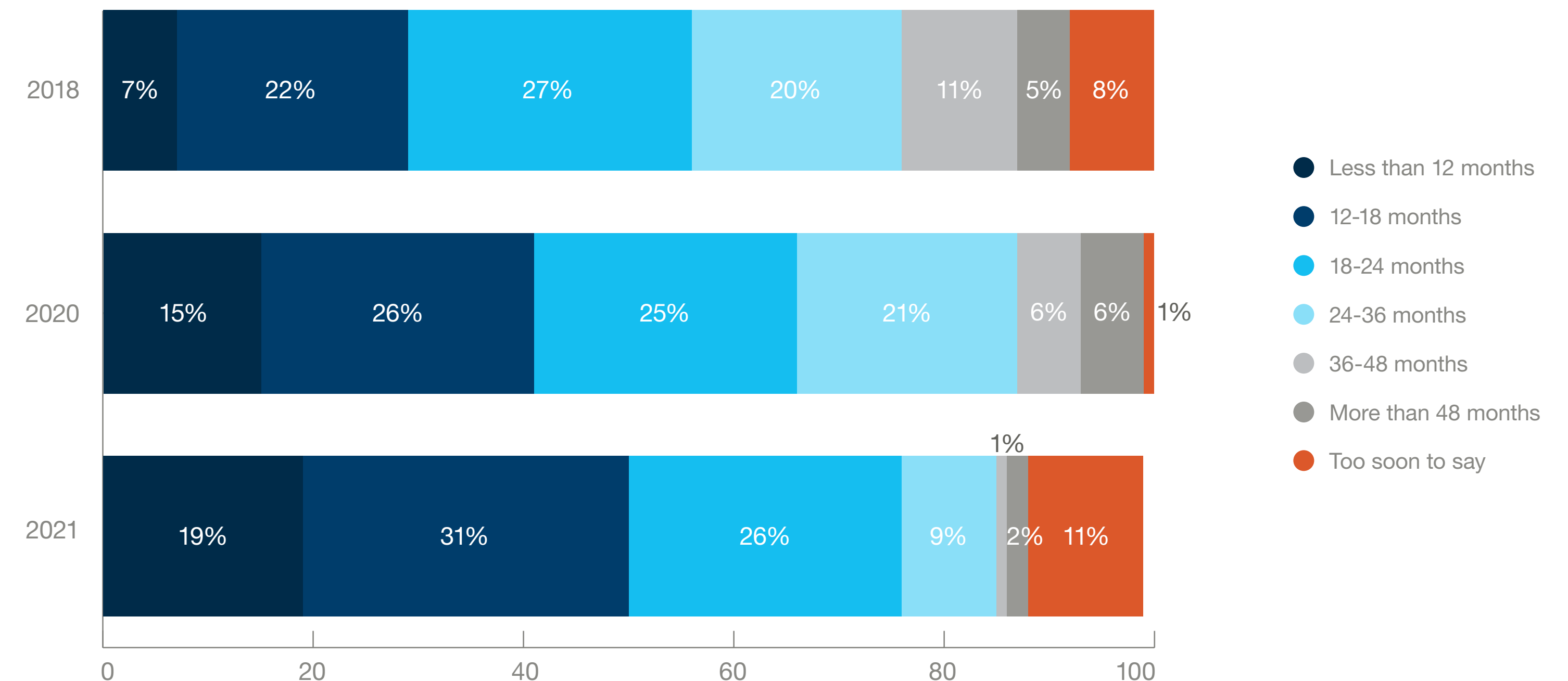
LAUNCH CYCLES FOR DIGITAL HEALTHCARE SOLUTIONS HAVE SHORTENED SUBSTANTIALLY

Since the initial survey in 2018, healthcare solution providers have taken steps to better align their digital product development cycles with customer expectations. Today, half say their development and launch cycles for digital health solutions are less than 18 months, whereas only 29% said the same in 2018. While the participant profiles have changed over the years, the changing healthcare landscape stands true.

Regardless of the solution type, today's market indicates that medical device manufacturers need to iterate every two to three years, not once a decade. This is a true crossroads for many long-standing, stable healthcare franchises: adapt to the accelerating pace of change or become a footnote. What's the best way to navigate the exciting but challenging road ahead?

**Some numbers may not add up to 100% due to rounding*

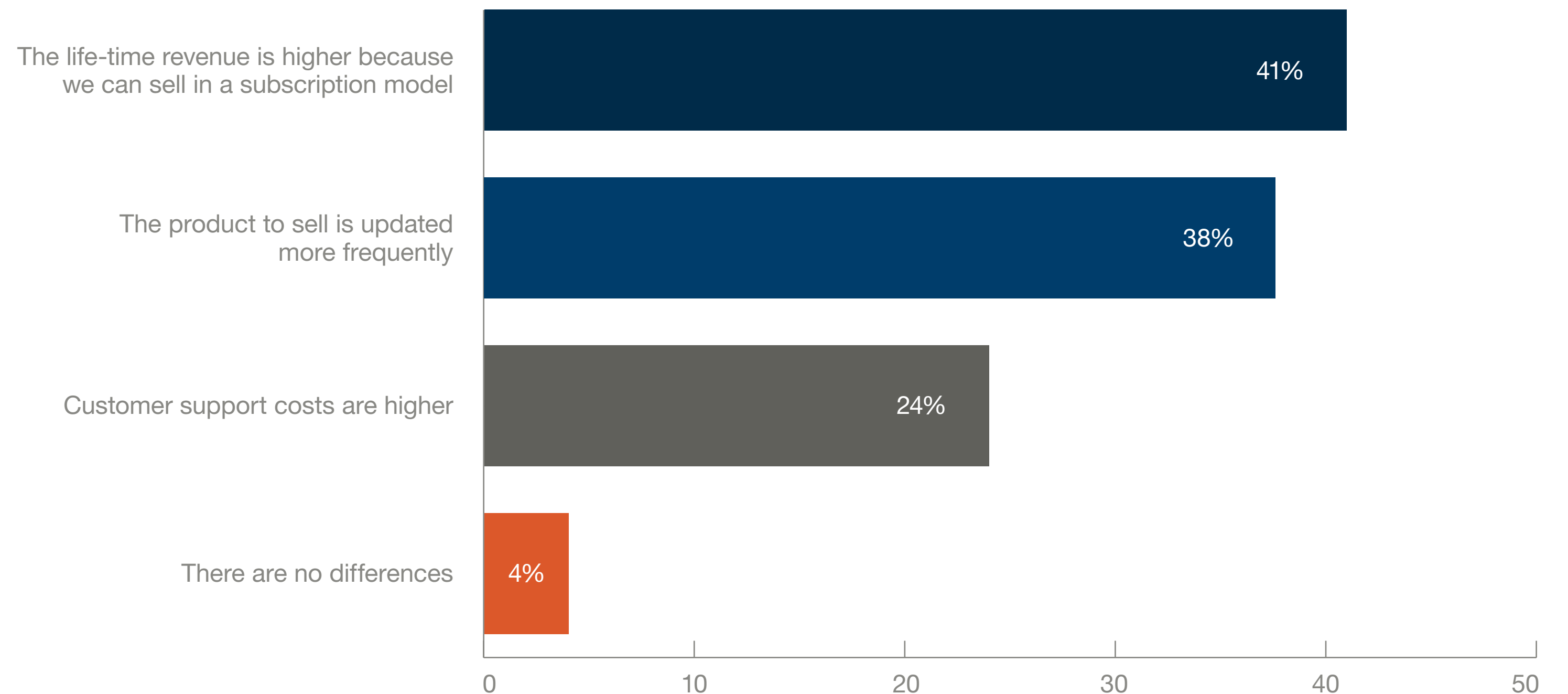
On average, how long is your company's product development and launch cycle for digital healthcare solutions?



96% REPORT DIFFERENT FACTORS FOR DIGITAL AND NON-DIGITAL HEALTHCARE SOLUTIONS

There are some clear differences in digital and non-digital healthcare solutions. Just above 40% of digital healthcare solution providers say their digital products have higher life-time revenue because they can sell in a subscription model.

How does your company's product lifecycle, from first customer ship to end of life, for digital healthcare solutions compare to non-digital solutions? Choose all that apply.





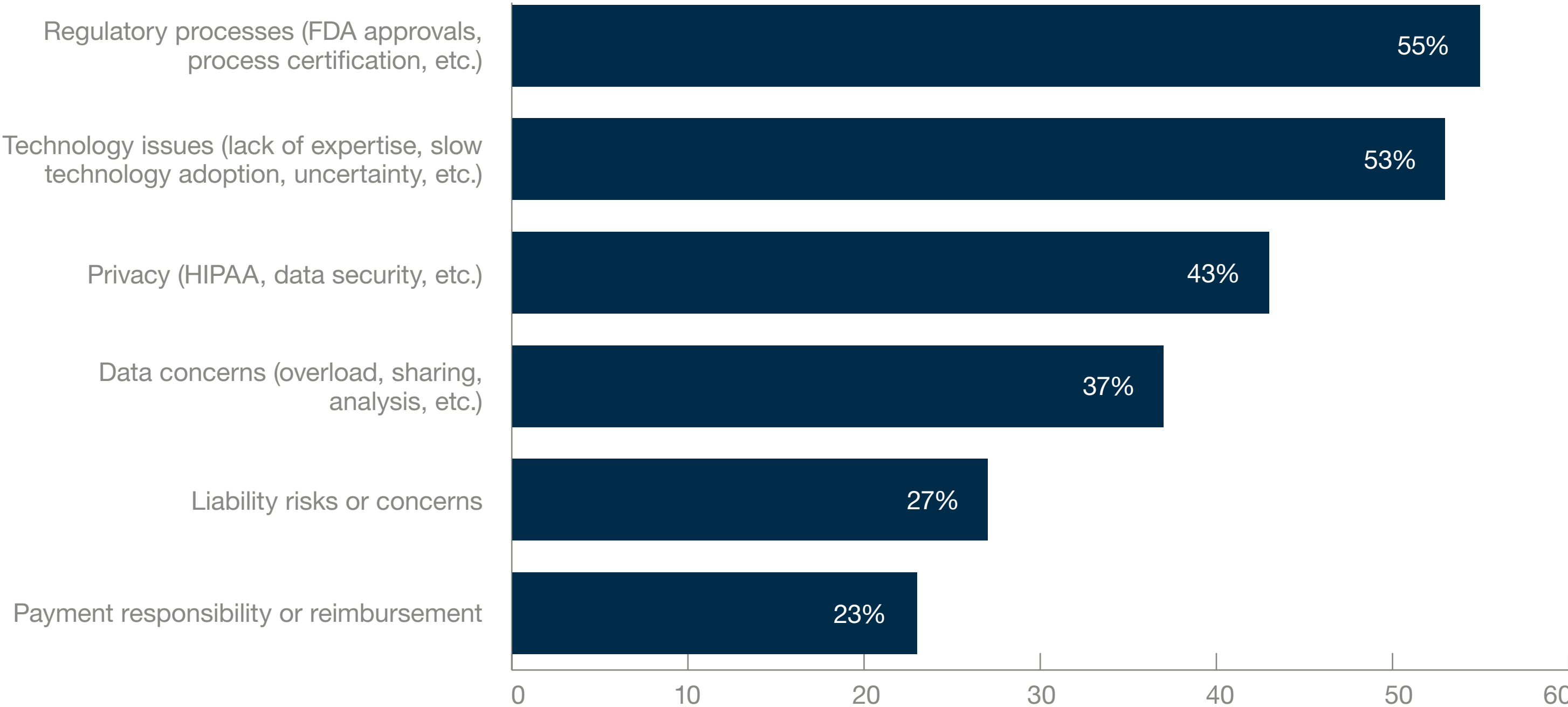
DIGITAL HEALTH DEVICE MANUFACTURING CHALLENGES

REGULATORY AND TECHNOLOGY CHALLENGES ARE TOP HURDLES

Regulatory hurdles are cited as the most significant issue when adopting digital healthcare solutions. Technology issues, such as lack of expertise and consumer uncertainty, are a close second.

Medical device manufacturing partners can help with all the ‘dissecting’ required by comprehensive product architecture — in effect providing eyes and ears to help ensure you don’t run into component obsolescence issues or other sourcing complications that drive excessive or unplanned development costs. They help you maintain a technology edge and provide support across every part of the process — from prototyping and clinical trial to premarket approval and regulatory requirement compliance.

Which of the following industry hurdles slow the adoption of your company’s digital healthcare solutions? Select all that apply.



INDUSTRY HURDLES VARY BY REGION

While regulatory processes prove to be the biggest industry hurdle, there are some nuances by regions. For example, APAC and North America show a high rate of liability and risk concerns, likely correlated to the regulatory hurdles. Privacy issues are the most significant in North America and Europe and of lesser concern in the Middle East. Nearly half of North American respondents cite payment responsibility and reimbursement as a hurdle to adoption.

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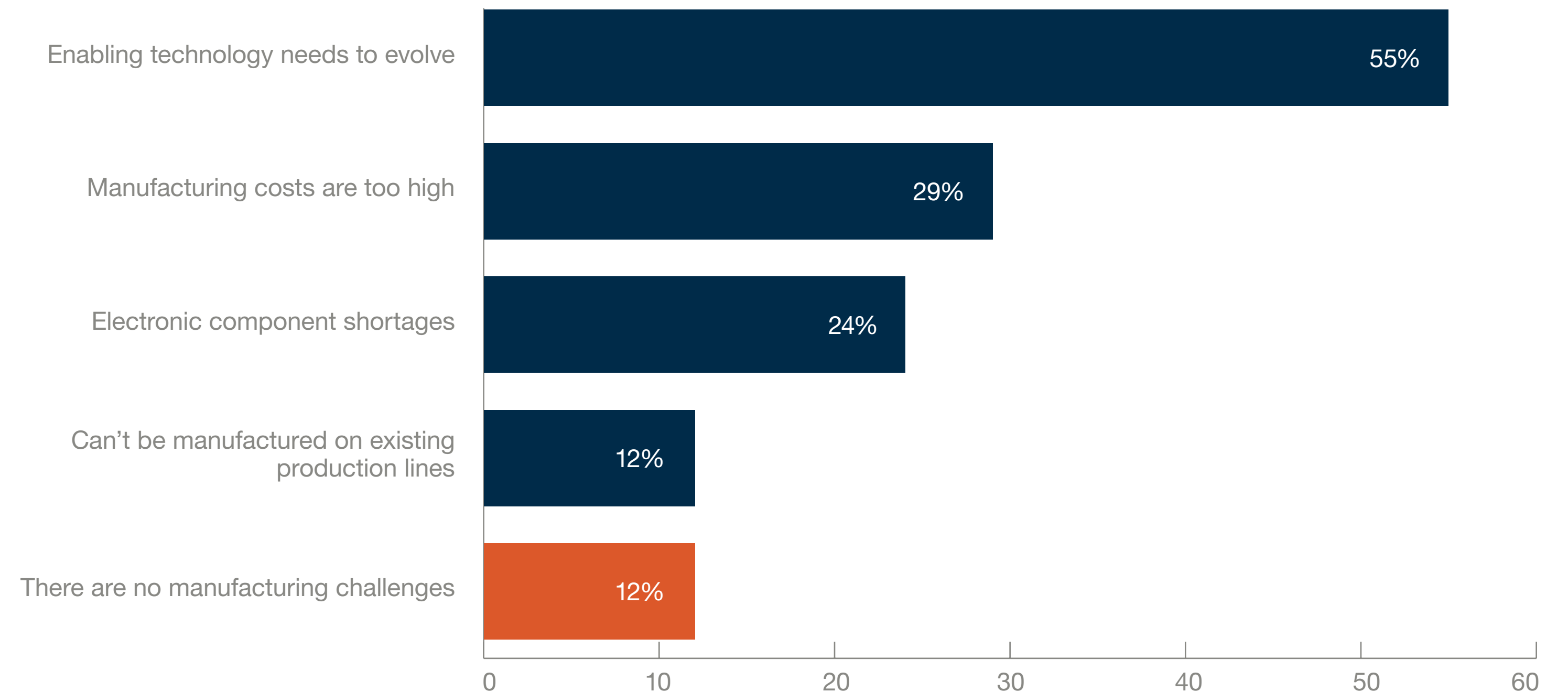
Which of the following industry hurdles slow the adoption of your company’s digital healthcare solutions? (By Region)

Regions	Regulatory Processes (FDA approvals, process certification, etc.)	Technology Issues (Lack of expertise, slow technology adoption, uncertainty, etc.)	Privacy (HIPAA, etc.)	Data Concerns (Overload, sharing, analysis, etc.)	Liability Risks or Concerns	Payment Responsibility or Reimbursement
APAC	22%	27%	18%	29%	26%	18%
Europe	26%	30%	26%	27%	18%	16%
LATAM	17%	17%	21%	4%	9%	10%
Middle East	15%	5%	9%	17%	16%	6%
North America	20%	21%	27%	23%	32%	49%

THE BIGGEST MANUFACTURING CHALLENGE: ENABLING TECH NEEDS TO EVOLVE

When it comes to manufacturing challenges that slow the development and delivery of digital healthcare solutions, most respondents affirmed that enabling technology needs to evolve. This option is followed by high manufacturing costs and the ongoing electronic component shortages.

Which of the following manufacturing challenges slow the development and delivery of your company's digital healthcare solutions? Select all that apply.



REGIONS EXPERIENCE MANUFACTURING CHALLENGES AT A DIFFERENT MAGNITUDE

While most companies experience manufacturing challenges in developing digital healthcare solutions, there are some regional differences. Companies in Latin America face the worst manufacturing challenges, whereas nearly one third in Europe and APAC cite not facing any challenges.

**Some numbers may not add up to 100% due to rounding*

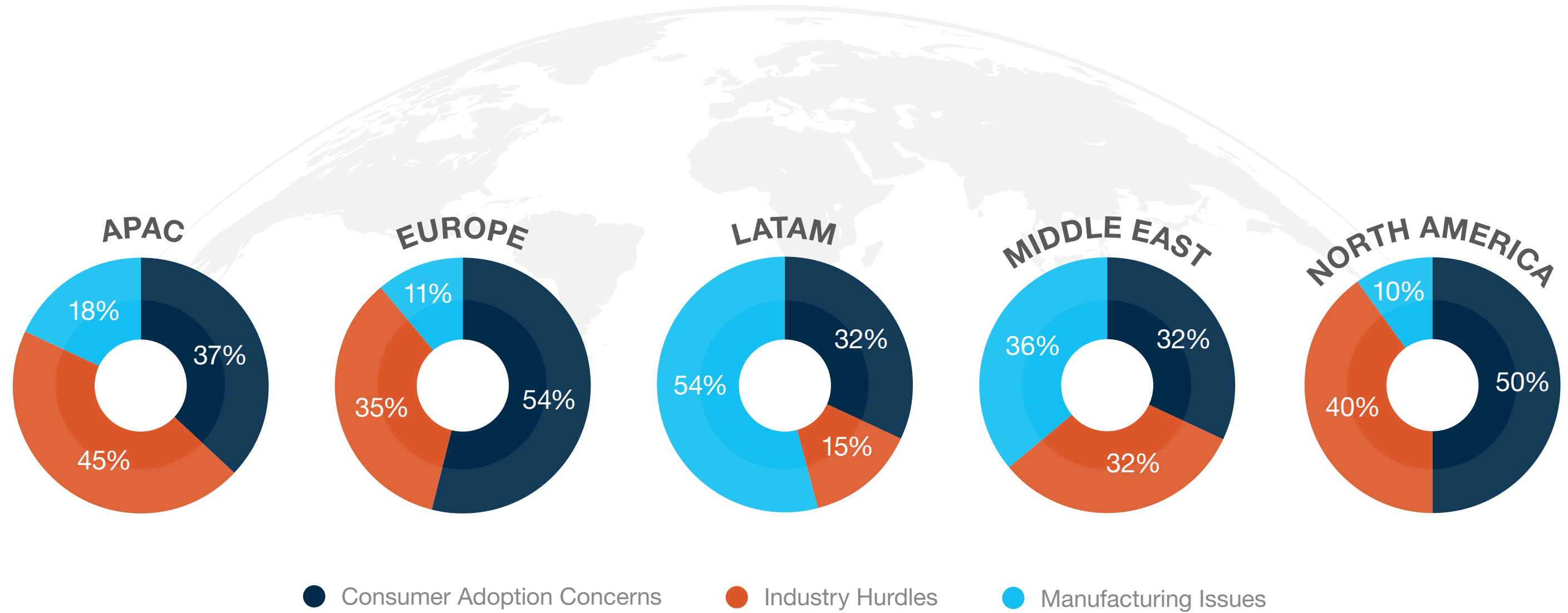
Which of the following manufacturing challenges slow the development and delivery of your company’s digital healthcare solutions? (By Region)

Regions	Enabling technology needs to evolve	Manufacturing costs are too high	Electronic component shortages	Can't be manufactured on existing production lines	There are no manufacturing challenges
APAC	10%	24%	26%	27%	32%
Europe	38%	16%	19%	42%	32%
LATAM	18%	12%	22%	19%	0%
Middle East	15%	20%	12%	8%	8%
North America	20%	29%	21%	4%	28%

CONSUMER ADOPTION CONCERNS ARE BIGGEST BARRIER TO DELIVERING SOLUTIONS

The biggest barrier to entry in digital healthcare solutions is consumer adoption concerns, especially in Europe and North America. These regions also face significant manufacturing issues, likely due to the high cost of manufacturing.

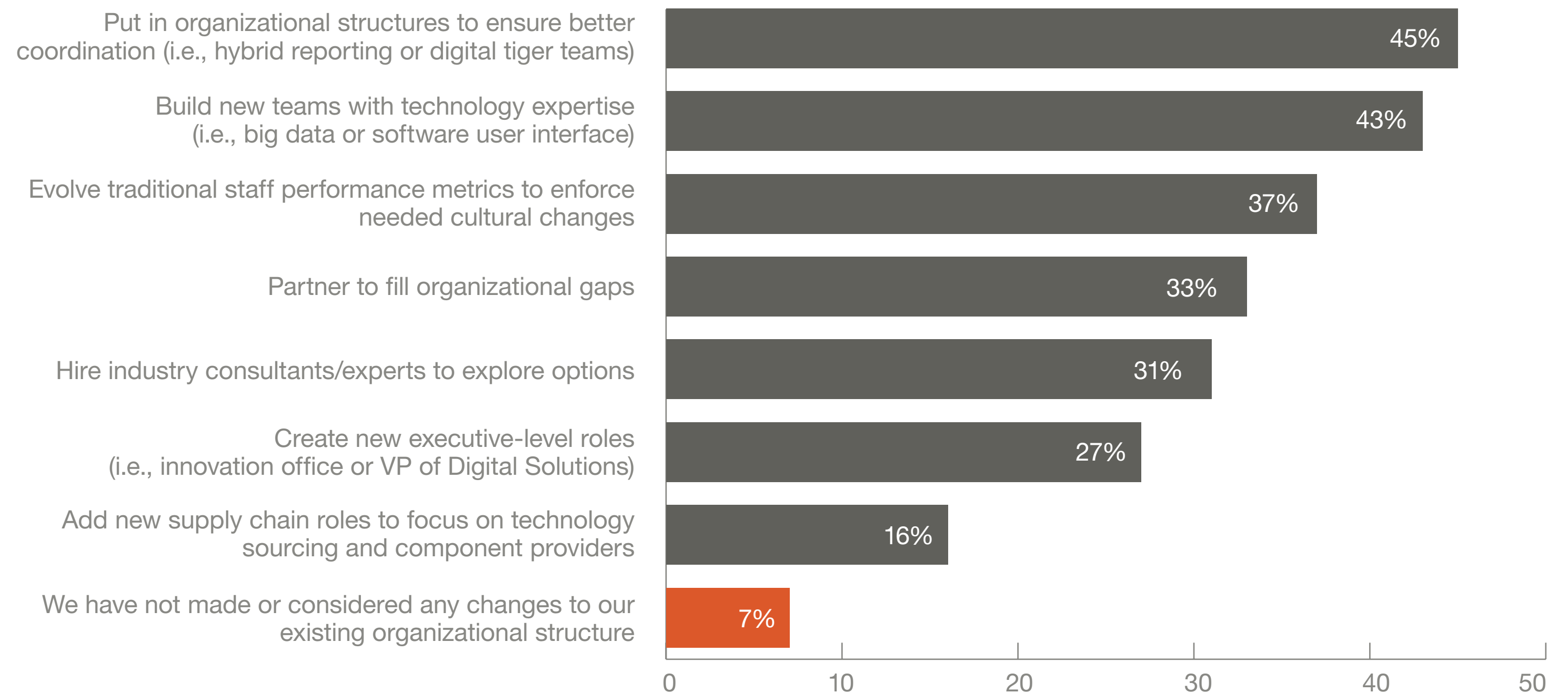
Which of the following creates the biggest barrier to delivering digital healthcare solutions?
Choose the one answer that most closely applies.



93% HAVE EXPLORED OR IMPLEMENTED ORGANIZATIONAL CHANGES

With numerous challenges at bay, 93% of decision-makers say they have explored or implemented organizational changes to support their digital health solution development. Nearly half have put in organizational structures to ensure better coordination and 43% have built new teams with technology expertise. Only 7% haven't made organizational changes.

Has your company explored or implemented any organizational changes to support your digital healthcare strategies and solution? Select all that apply.



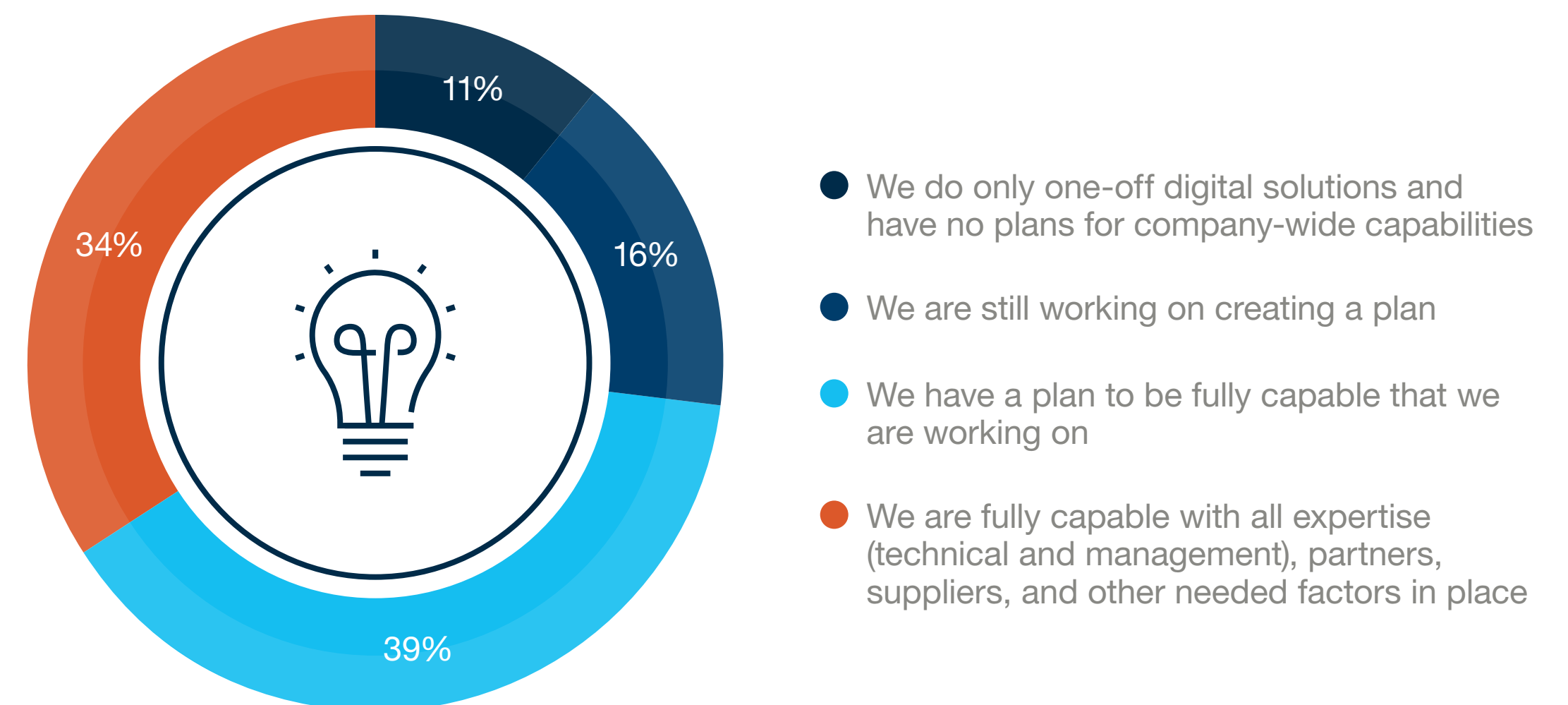
ONLY 34% DESCRIBE THEIR COMPANY AS FULLY CAPABLE OF DELIVERING DIGITAL HEALTHCARE

Innovative new technology has been the driver in both the automotive and consumer technology industries, and now it's healthcare's turn as digital health technology transforms the patient experience and healthcare products behave much more like consumer products.

The industry has entered fresh ground, inspiring old companies to embrace new approaches in their mission to improve healthcare and optimize patient outcomes. Perhaps that's why only 34% of participants say their company is fully capable to deliver innovative digital healthcare solutions.

Healthcare has become a much more dynamic industry, driven by extraordinary technological innovation and other exciting new developments. Success and survival for the biggest brands as well as smaller upstarts will come to those with a better understanding of their customers, ready to serve with enhanced offerings while not being slow off the mark in an increasingly fast-paced world. A manufacturing partner may be just the solution.

How would you rate your company's ability to deliver innovative digital healthcare solutions?



CONFIDENCE IN ABILITIES TO DELIVER DIFFER BASED ON SOLUTION TYPE

While 34% of participants believe they are fully capable in delivering their digital health solutions and nearly four in 10 say they have a plan in process, there are some differences based on solution types. Those developing infection detection and monitoring, diagnostic equipment and pharmaceutical equipment are more likely to believe they are fully capable, whereas the rest are working to execute on their plans.

How would you rate your company's ability to deliver innovative digital healthcare solutions? (By Solution Type)

● Highest

Type of digital healthcare solutions	We are fully capable with all expertise (technical and management), partners, suppliers, and other needed factors in place	We have a plan to be fully capable that we are working on
On-body or wearable devices – fitness trackers, external monitors, CPAP, etc.	35%	46%
In-body devices – pacemakers, etc.	26%	45%
Environment monitoring – air quality, etc.	45%	48%
Patient compliance tracking – digital pills, etc.	26%	49%
Patient monitoring – fall detection, heart rate monitoring, etc.	29%	42%
Disease state monitoring	33%	39%
Infection detection and monitoring	38%	30%
Diagnostic equipment – MRIs, ultrasound, echocardiogram, etc.	40%	38%
Pharmaceutical equipment – smart injectors or inhalers, etc.	57%	28%
3D printed and connected parts – replacement hips, artificial limbs, wear and tear, etc.	40%	47%

A hand with purple nail polish is holding a blue pen. The background is a blurred image of a person in a blue shirt. Overlaid on the image are various digital icons and lines, including a heart rate monitor, a laptop, a cloud, and a Wi-Fi symbol.

EMERGING BUSINESS MODELS IN HEALTHCARE

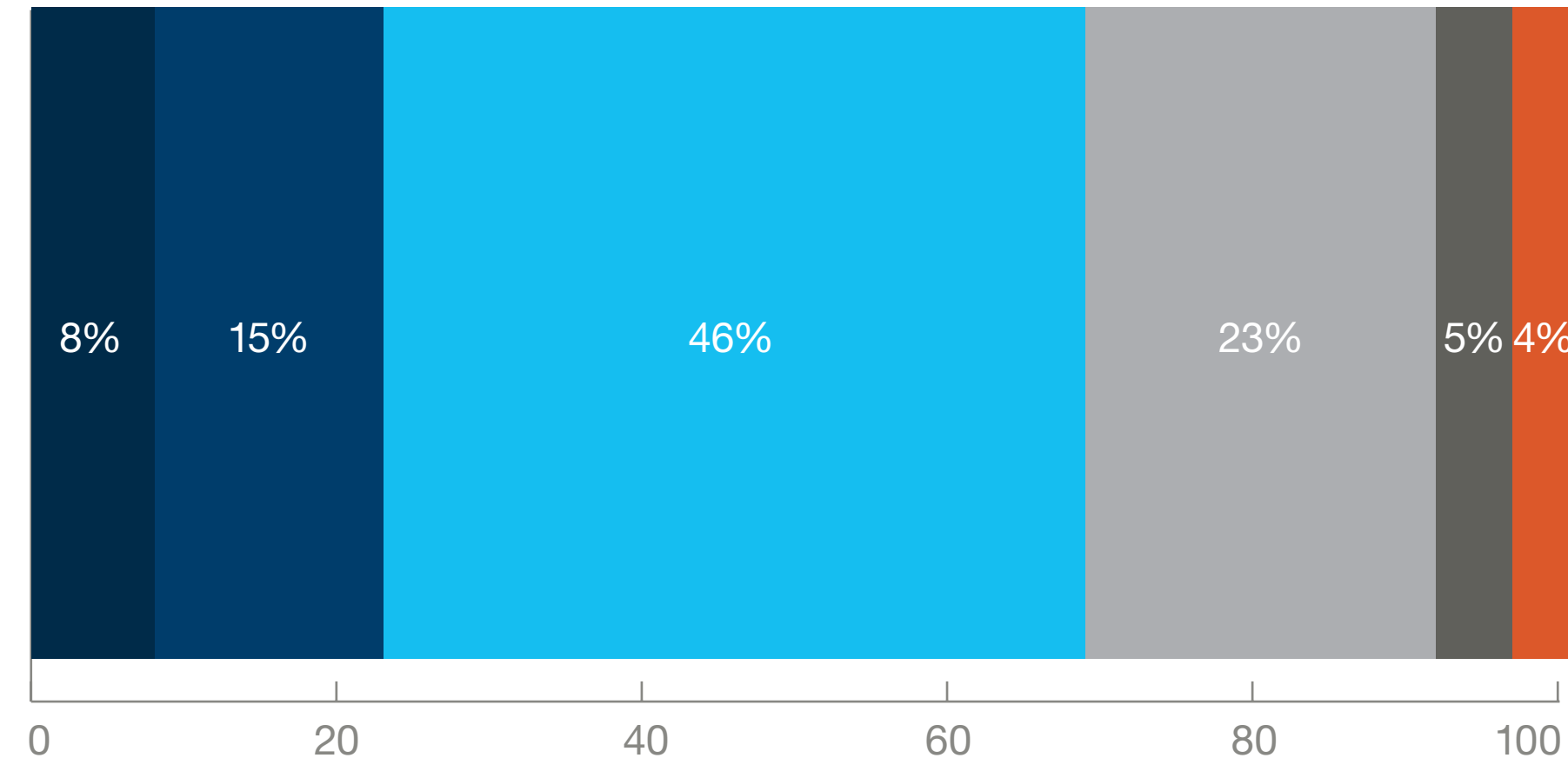
SOLUTION PROVIDERS ARE SERIOUSLY CONSIDERING VALUE-BASED CARE

Value-based care models (in which reimbursements are driven by outcomes) have the potential to revolutionize patient care and medical infrastructure, but they require data to prove outcomes. Digital healthcare products and the data they produce will become a critical source for patients' health and wellness. The survey shows that most companies are well down the road in making changes to their business model in response to value-based care.

New technologies are turbocharging how the industry is navigating the course set by value-based care. In fact, 23% of digital healthcare solution providers say their company is already addressing value-based care in their business model, and 46% are seriously considering options.

**Some numbers may not add up to 100% due to rounding*

Has your company considered alternative business models based on the shift to value-based care? Choose the one answer that most closely applies.



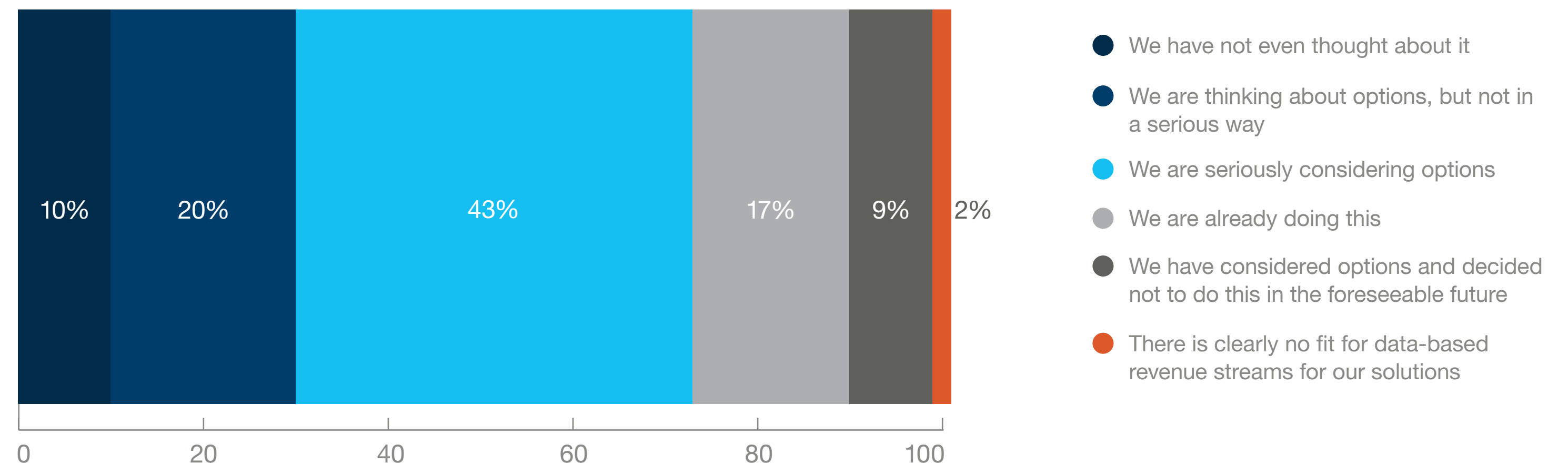
- We have not even thought about it
- We are thinking about options, but not in a serious way
- We are seriously considering options
- We are already doing this
- We have considered options and decided not to do this in the foreseeable future
- There is no fit for performance-based business models for our solutions

DATA-BASED REVENUE STREAMS ARE A SERIOUS CONSIDERATION OR REALITY FOR MOST

One of the potential benefits of digital healthcare solutions is that companies can use the data collected to create additional revenue streams (for example, by selling to research labs or marketing firms).

Internet of Medical Things (IoMT) devices can monitor, collect data for the broader ecosystem, communicate with the care provider and facilitate timely interventions while helping to cut down on unnecessary hospital visits. They will enhance patient quality of life and deliver peace of mind by letting people go about their daily routine knowing their provider is in the driver seat.

Has your organization considered using data collected to create additional revenue streams?



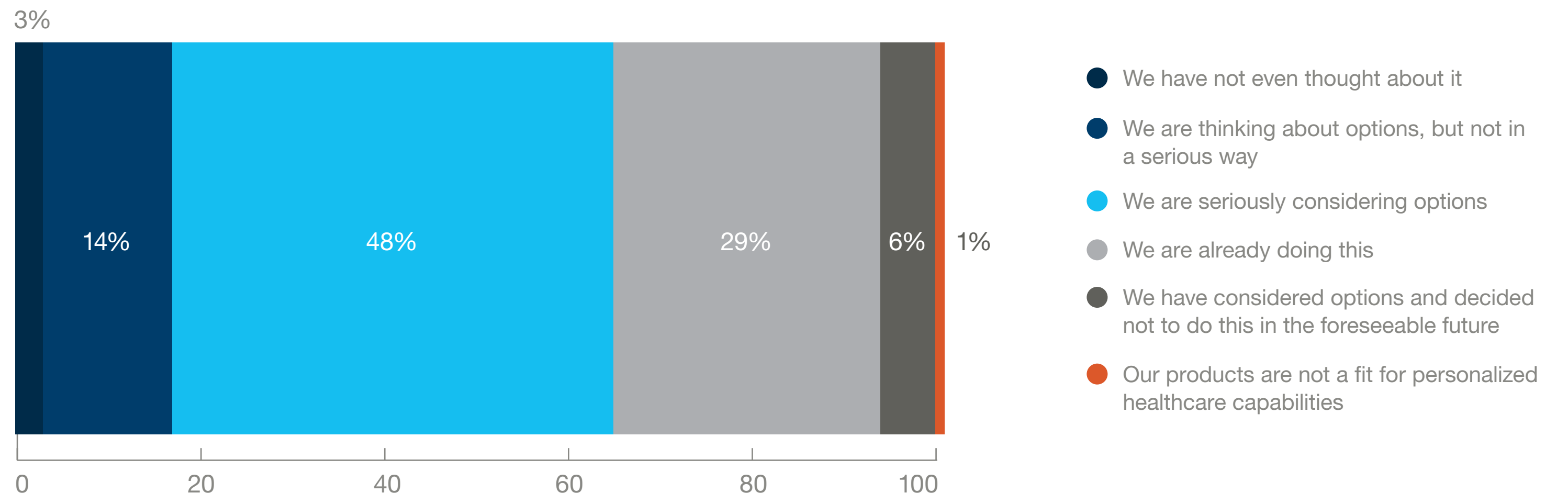
**Some numbers may not add up to 100% due to rounding*

PERSONALIZED HEALTHCARE CAPABILITIES ARE SERIOUSLY ON THE RADAR FOR HALF

One of the potential benefits of digital healthcare solutions is that information can be used to enable highly personalized healthcare where specific courses of action are recommended or automatically taken based on ongoing monitoring of patient status and compliance.

Half of the participants say they are seriously considering options while 29% already leveraging personalized healthcare capabilities.

Has your organization considered building in personalized healthcare capabilities to your solutions?



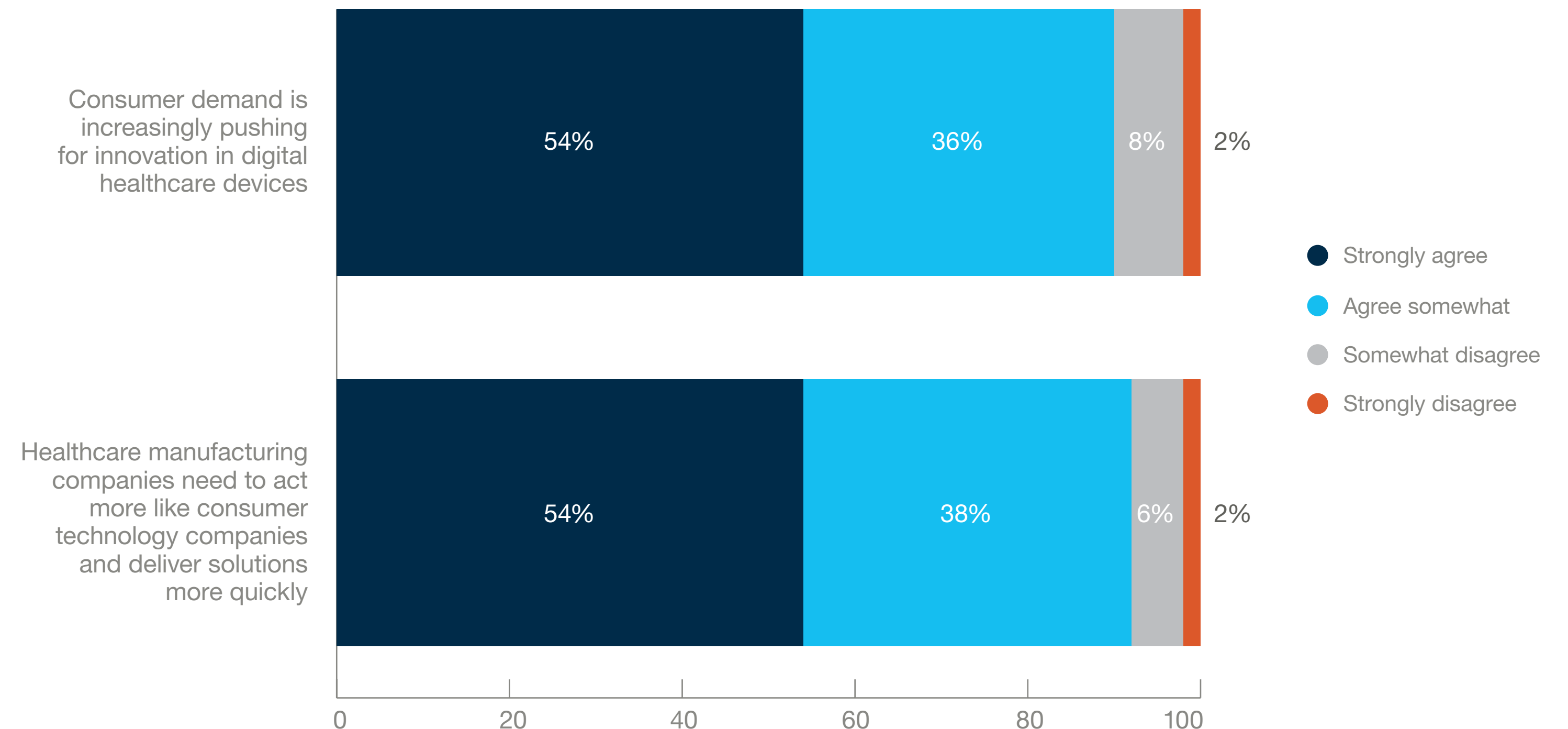
**Some numbers may not add up to 100% due to rounding*

CONSUMER DEMAND STILL THE DRIVING FORCE OF HEALTHCARE INNOVATION

Consumer businesses are driven by the need for constant innovation. As healthcare shifts its focus from “patients” to “consumers,” expectations have changed in this industry as well. Nine in 10 respondents said that consumer demand is increasingly pushing for innovation in digital healthcare devices.

In addition, 92% say that healthcare manufacturing companies must operate more like consumer technology companies and deliver solutions more quickly. While the healthcare industry must work through common regulatory approvals that may differ by region, there are various ways healthcare manufacturing companies can accelerate time-to-market.

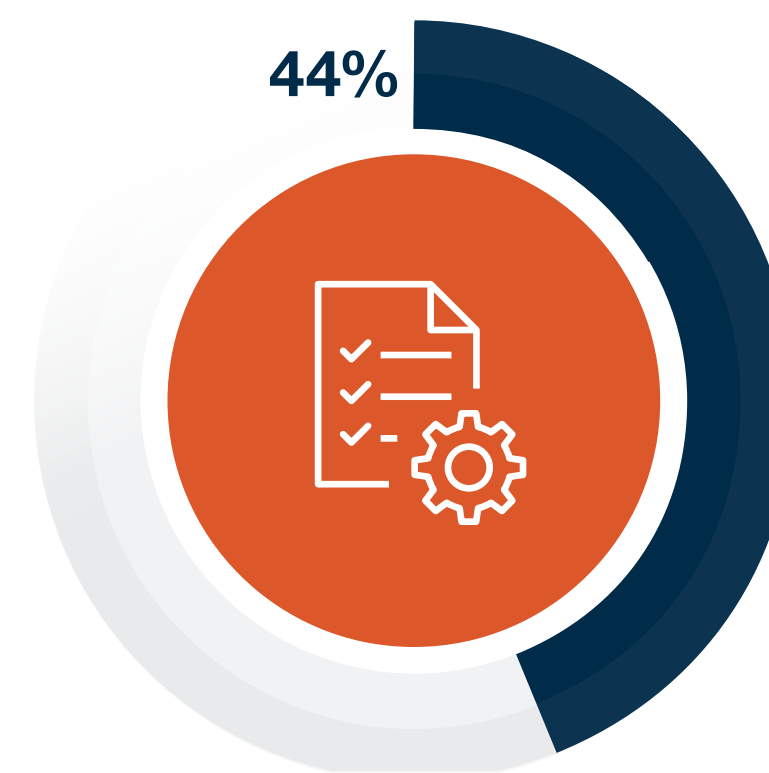
Please indicate your level of agreement with each of the following statements.



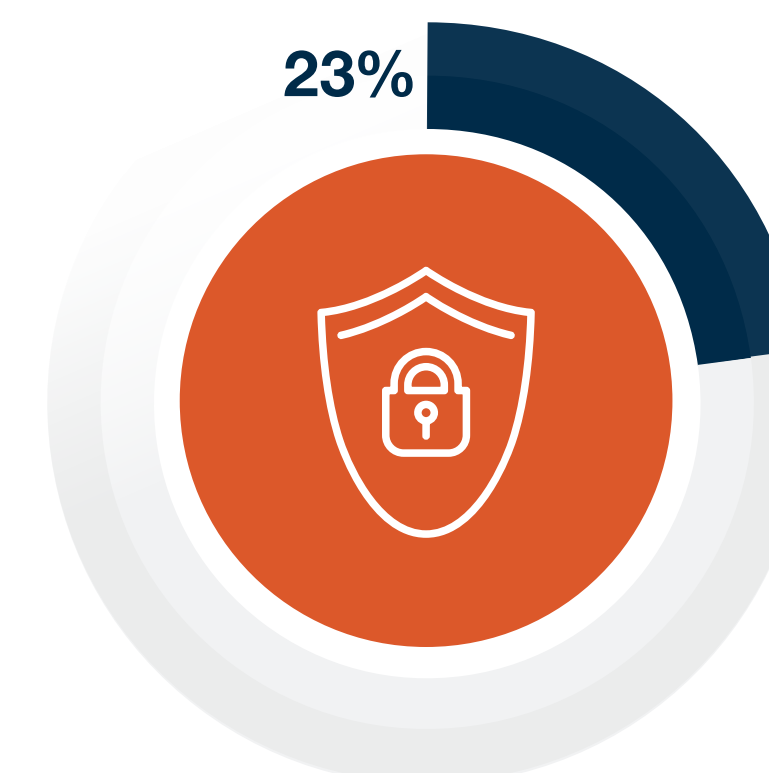
DIGITAL HEALTH INNOVATION WILL BE DRIVEN BY HEALTHCARE MANUFACTURERS

Consumer demand may be the leading force behind the inevitable innovation in healthcare, but 44% of digital healthcare solution providers believe this innovation will be led by healthcare manufacturing companies that understand certification and production. Meanwhile, 56% believe “outsiders” like enterprise technology companies or consumer technology companies will lead in innovation.

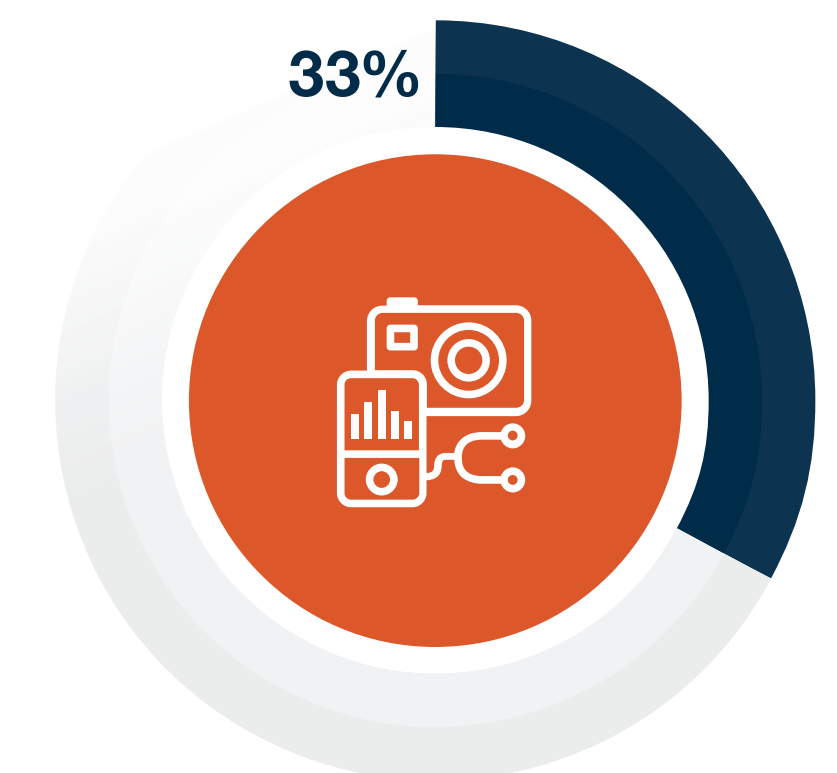
In your opinion, who will drive transformational technology innovation in the digital health industry? Choose the one answer that most closely applies.



Healthcare manufacturing companies that understand certification and production (i.e., FDA approvals, HIPAA regulations)



Enterprise technology companies that understand data and security (i.e., Cisco, Microsoft, Oracle)



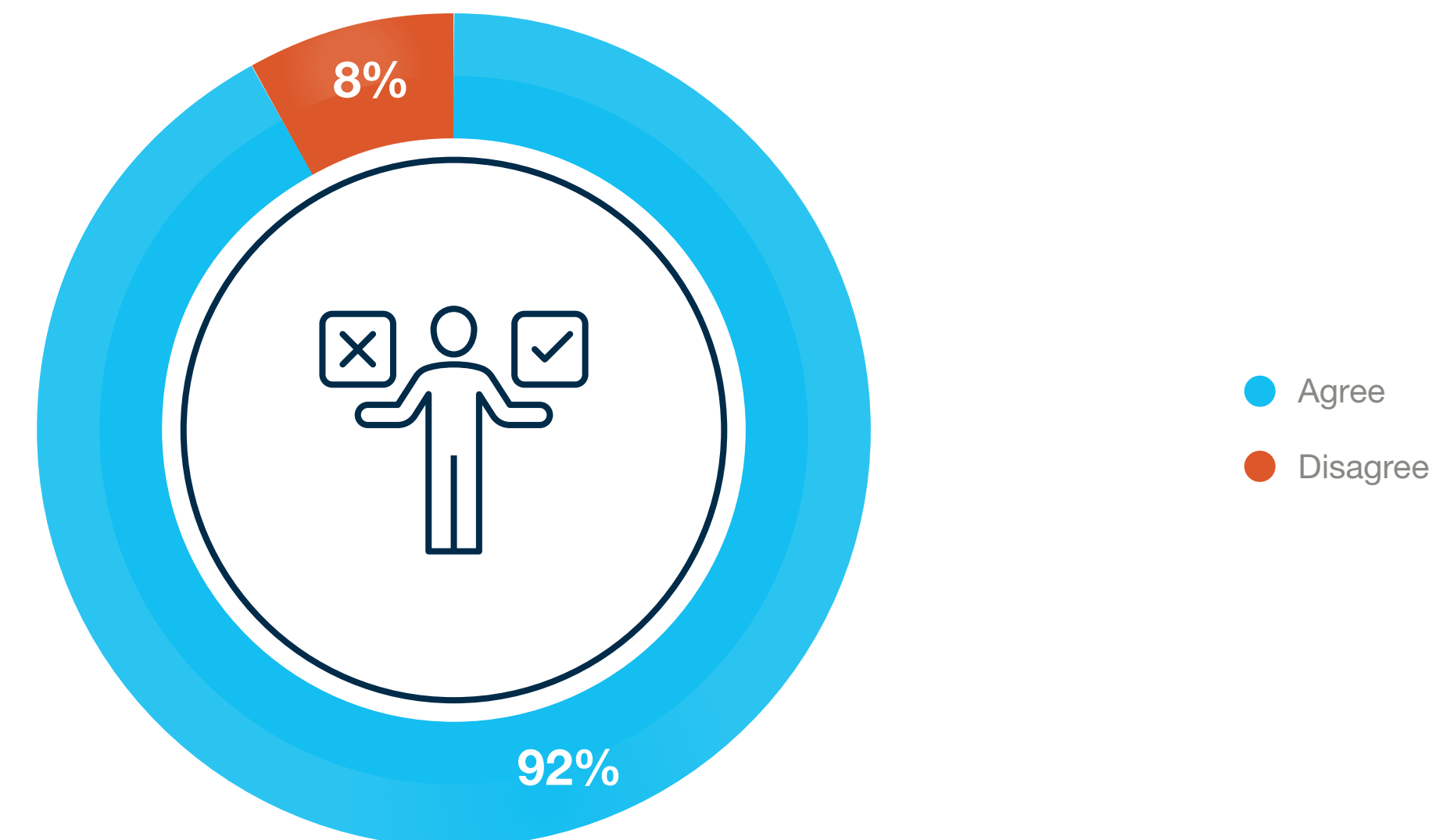
Consumer technology companies that understand user experience and consumer electronics (i.e., Apple, Google)

WIDESPREAD AGREEMENT ON INTEROPERABILITY

More than nine in 10 digital healthcare solution providers agree that digital healthcare's collection and purposing of data should be standardized to enable interoperability between devices and within product platforms.

In the shift from product-centric to customer-centric, interoperability has become non-negotiable. Interdependent technology platforms that collect, combine and share streams of data are emerging to capture value for all stakeholders in the game.

Please indicate your level of agreement with the following statement.

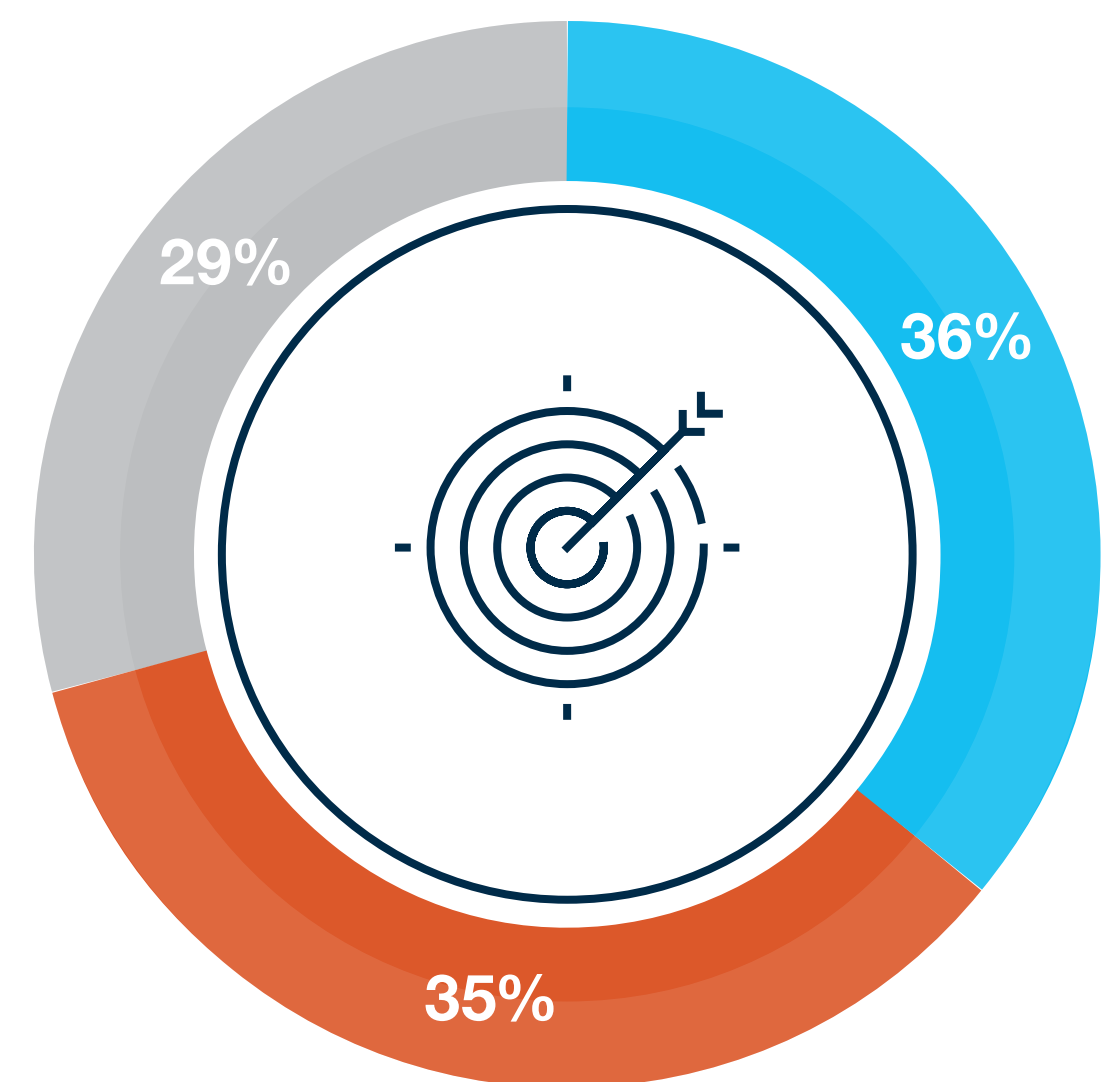


Digital healthcare's collection and purposing of data should be standardized to enable interoperability between devices and within product platforms

DIGITAL HEALTHCARE SOLUTION PROVIDERS ARE STILL SPLIT ON INTEROPERABILITY APPROACH

Although 92% of digital healthcare solution providers agree that digital healthcare's collection and purposing of data should be standardized to enable interoperability, perspectives are split on the approach. Just over one third plan to deliver all needed functionality within their own controlled ecosystem to better control the customer experience. Another 36% say they prefer to follow generally accepted industry standards that enable interoperability within product platforms. Finally, 29% say they plan to be open and enable their customers to do anything they want.

Which of the following best describes your company's preferred approach when building digital healthcare solutions? Choose the one answer that most closely applies.

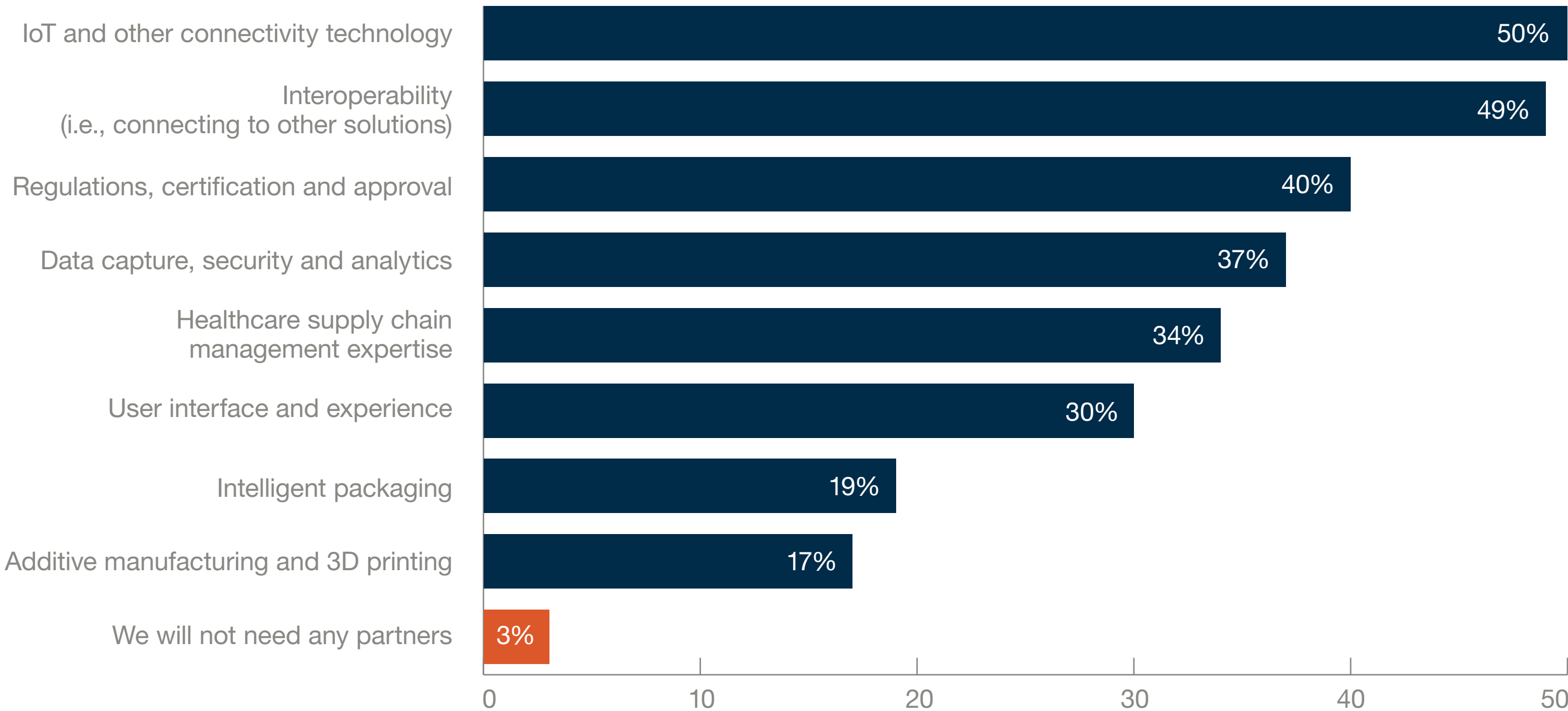


- Follow generally accepted industry standards that enable interoperability within the ecosystem that adopts those (i.e., Android)
- Deliver all needed functionality within our own controlled ecosystem so we have control of the customer experience (i.e., Apple)
- To be open and enable our customer to do anything they want (i.e., Open source)

OUTSIDE EXPERTISE IN INTERNET OF THINGS AND INTEROPERABILITY REQUIRED

Almost all digital healthcare solution providers indicated that they would turn to their partners for digital health expertise across numerous areas. Half say they will require outside expertise and partnership for IoT and other connectivity technology, while 49% will require help with interoperability. Beyond these challenges, participants will be looking to outside expertise and partnerships to overcome challenges in regulations, certifications and approvals.

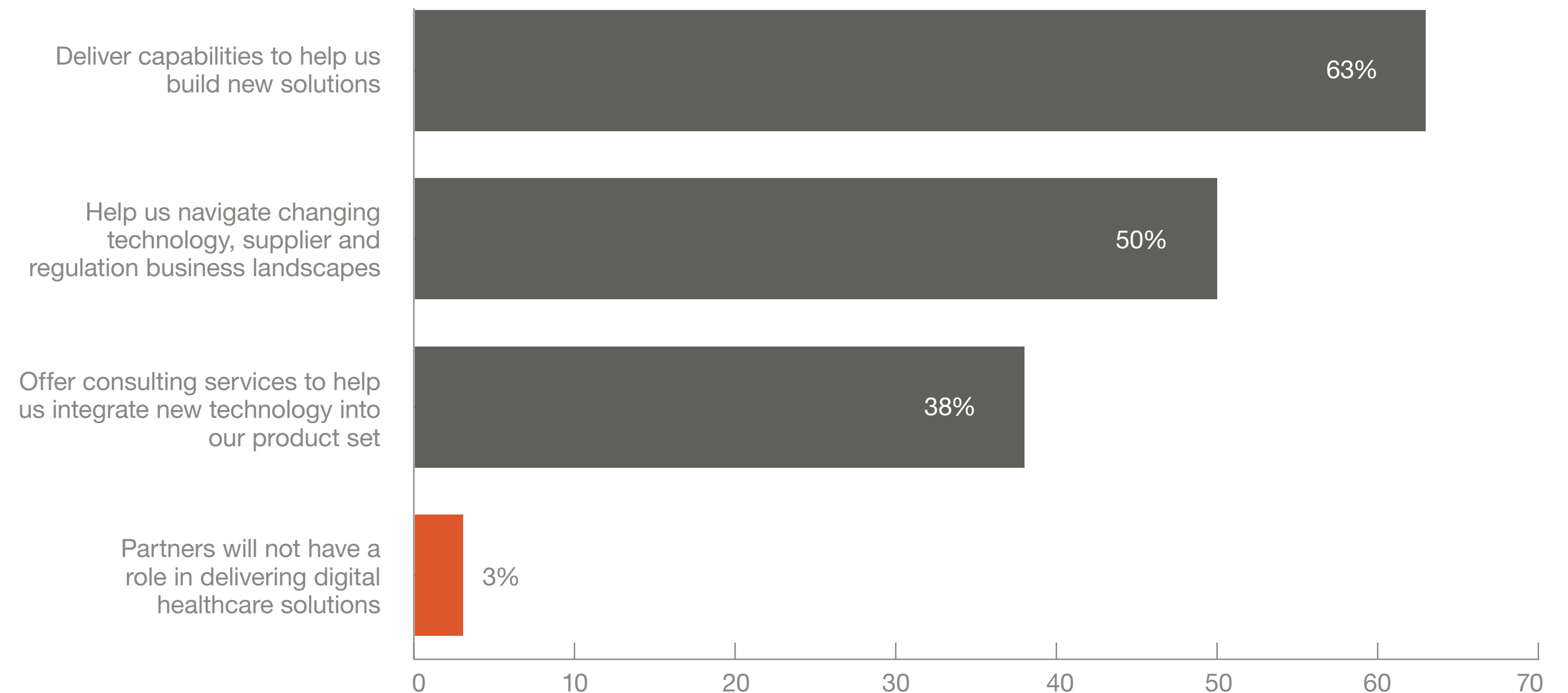
Which of the following digital healthcare manufacturing and product development issues do you identify as challenges for which your company will require outside expertise and partnership? Choose all that apply.



PARTNERS WILL PLAY A RANGE OF ROLES IN THE DELIVERY OF SOLUTIONS

Manufacturing partners are expected to play diverse roles in helping companies deliver digital healthcare solutions. Specifically, 63% say they expect their manufacturing partners to deliver capabilities to help them build new solutions. Additionally, half say they need help navigating changing technologies, supplier and regulation business landscapes. Finally, 38% will be looking for consulting services to help integrate new technology into their product set.

In the face of accelerating technology innovation, what role do you expect your manufacturing partners to play in delivering digital healthcare solutions? Choose all that apply.



SURVEY METHOD AND PARTICIPANTS

Research Goal

The primary research goal was to understand trends, experiences, and plans for production of digital healthcare solutions.

Methodology

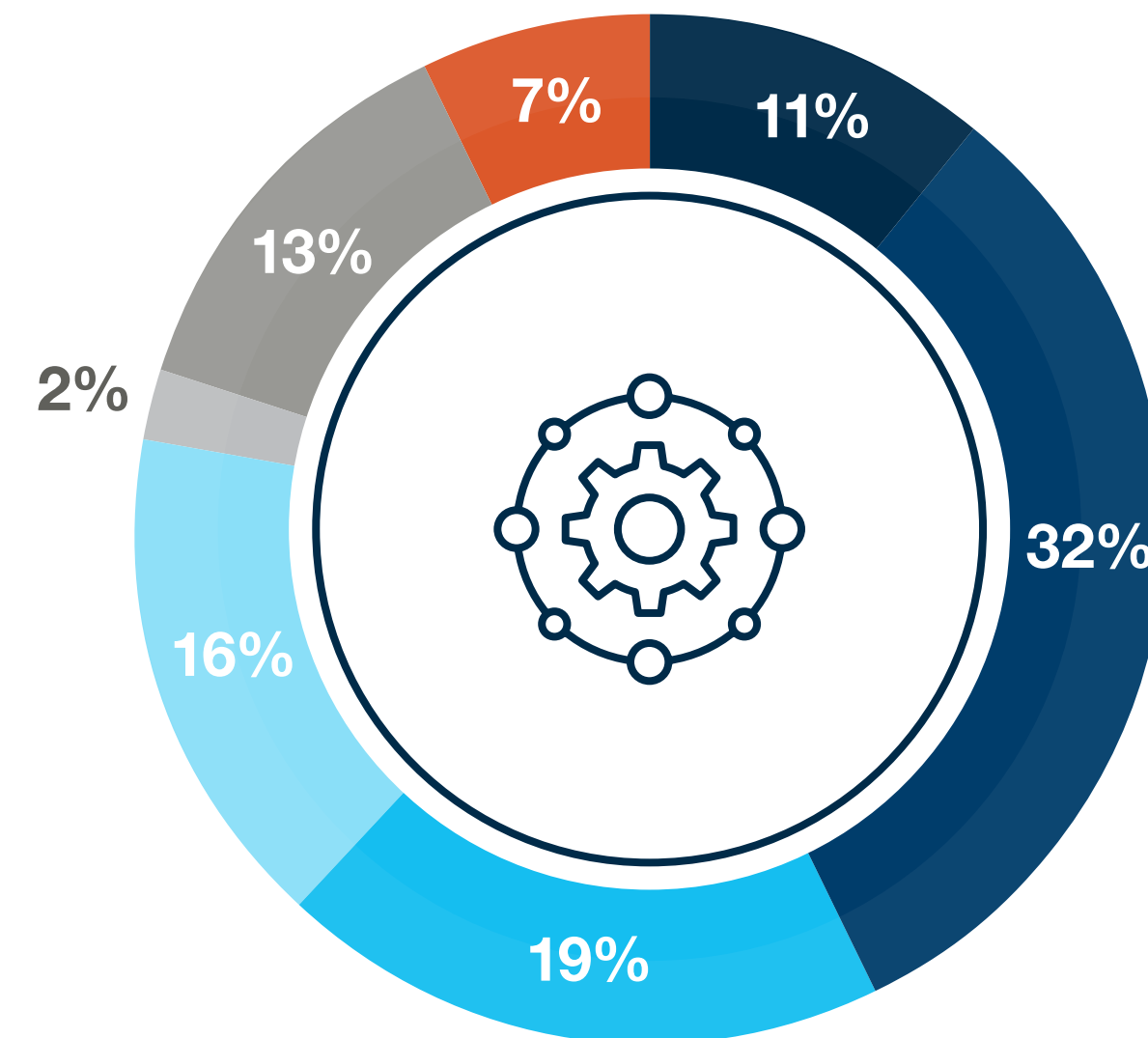
An online survey was fielded to decision-makers responsible for their organization's healthcare solutions. A variety of questions were asked on status of digital healthcare solutions, challenges faced, and other issues.

Participants

A total of 210 qualified participants completed the survey. All participants worked at companies with existing or planned digital healthcare products in a decision-making role.

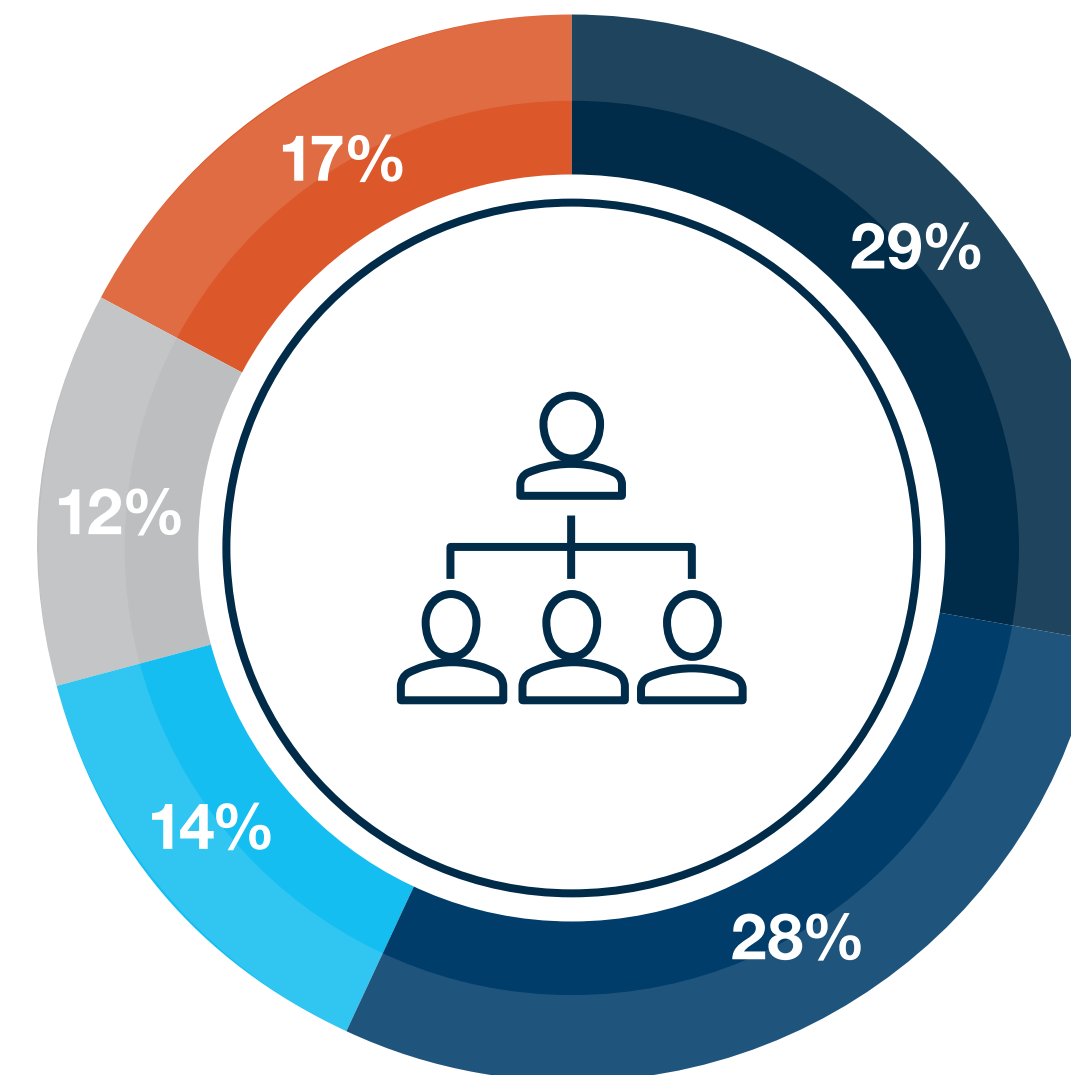
SURVEY METHOD AND PARTICIPANTS

Function



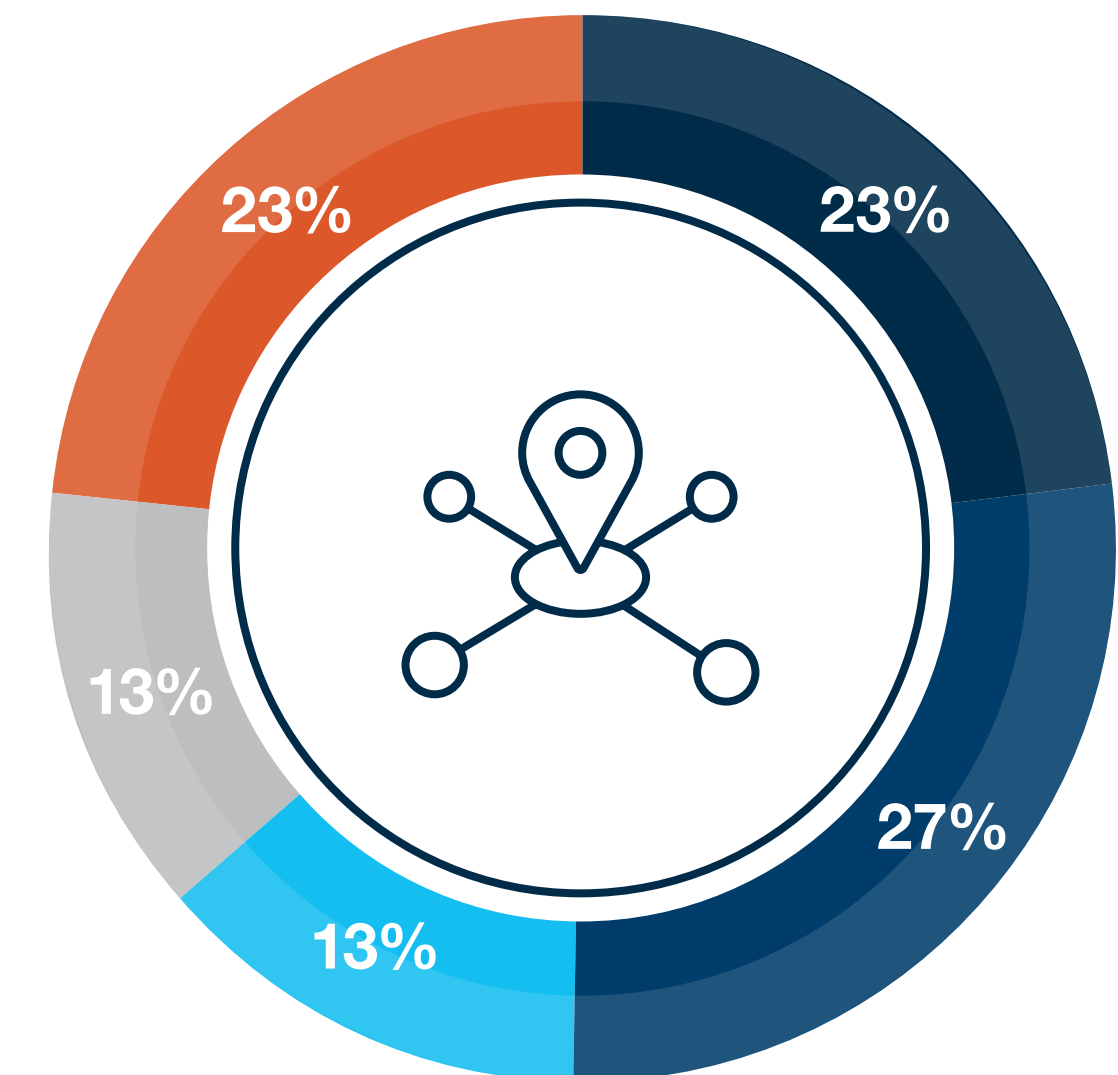
● Engineering ● Product Management ● Other
● Operations ● Production
● Procurement ● Research and Development

Seniority



● C-suite ● Senior Researcher
● Director ● VP
● Management

Region



● Asia Pacific ● Middle East
● Europe ● North America
● Latin America

JABIL HEALTHCARE

Jabil Healthcare is the largest global manufacturing solutions provider in healthcare.

Jabil Healthcare serves five key sectors in the healthcare market: medical devices, orthopedics, diagnostics, pharmaceutical delivery systems and consumer health. In each arena, demand for value-based care solutions is forcing significant changes in the evolution of healthcare products and services and driving digital health innovations. Taking centerstage are Internet of Things (IoT) and digital health platform innovations enabled by connectivity, sensors and miniaturization.

Jabil Healthcare unifies the company's medical industry know-how with deep cross-sector experience in injection molding, electronics, sensor integration and additive manufacturing to help healthcare brands accelerate and scale technology advancements. This integrated line of capabilities across Jabil is brought to bear for its base of healthcare customers, from emerging startups to global enterprises.

LEARN MORE ABOUT JABIL HEALTHCARE



FOR MORE INFORMATION

SIS International Research

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