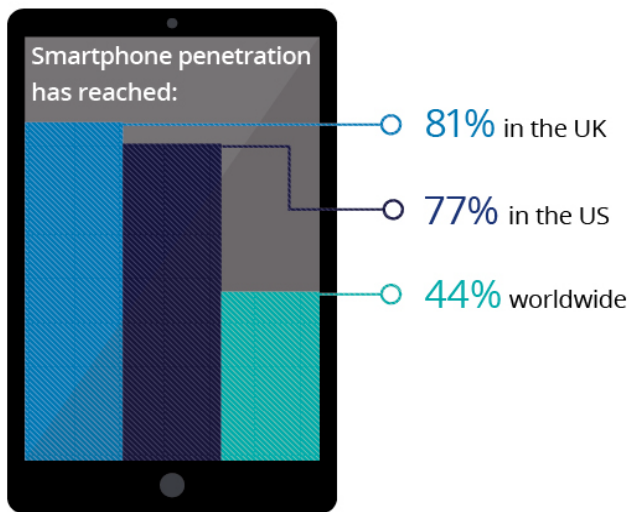


The rise of the connected patient



Of 190 patient groups surveyed:



Over **65%** access health apps using a smartphone



Almost **70%** use at least one health app to manage their condition



Over **50%** use health apps 'regularly' or 'occasionally'

Big pharma's drive towards digital

Analysis of the top 12 pharma companies revealed:



Pharma apps generated **5.6 million** downloads out of **3.2 billion** downloads generated overall by mHealth apps in 2016



Year-on-year, the **growth rate of pharma app downloads** has slowed from **197%** between 2013 and 2014, to **5%** between 2015 and 2016

2013



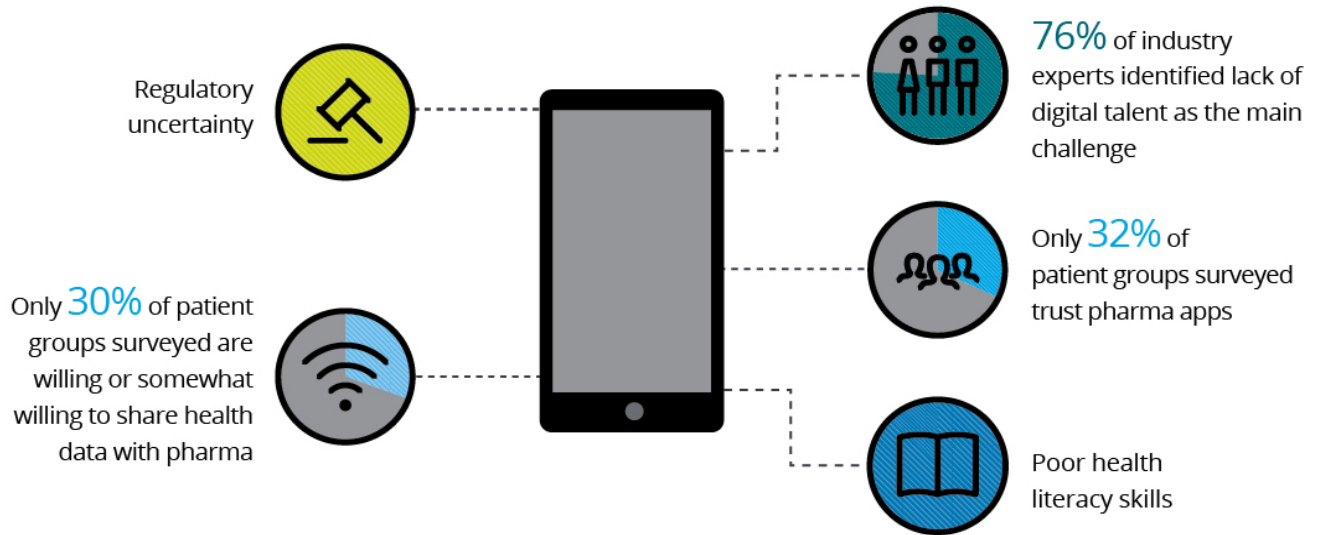
2016



The **number of apps produced** by pharma companies has more than **tripled** from 305 in 2013 to 988 in 2016

The **5 most popular apps** produced by pharma companies accounted for **51%** of downloads in 2016

Barriers to adoption of digital technology



Strategies to improve patient centricity

