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SAMPLE REPORT

EUROPE DIGITAL HEALTH MARKET AND TRENDS 2023

PUBLICATION DATE: MAY 2023

PREFACE

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- yStats.com provides secondary market research: By using various sources of information we ensure maximu all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- Only reliable sources such as national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries and news portals are used as a basis for the analyses, statistical reports and forecasts.
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GENERAL METHODOLOGY OF MARK TS

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Secondary Market Research

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objec for reported data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

Definitions

- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.

Chart Types

- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.

Report Structure

- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.

Notes and Currency Values

- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values in the Action Title, the EUR values are also provided in brackets. The conversions are made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.

METHODOLOGY OF THE CURRENT

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Report Coverage

- This report covers the European digital health market. Digital health includes mobile health (mHealth), health information technology (IT), wearable devices, telehealth and telemedicine, and personalized medicine and defined as an ecosystem computing platforms, connectivity, software, and sensors for health care and related uses. The report offers insights into the state of digital health adoption in different regions across the globe, recent and possible future developments, consumer preferences, technological advances and more.
- In addition to the global data, the digital health market in Europe is covered in the report. The current status of digital health itself and data availability varied by region and country.

Report Structure

- The report opens with a global chapter. It includes information about the market size and projections for the future development of the digital healthcare market, including statistics on the digital health subsectors, as well as top market trends, technological advances, and market players' and consumers' preferences.
- The rest of the report includes regional section containing country chapters and/or regional information, where available. The countries are ranked by the state of the digital health market development and include related data points, such as the status of digital health market development and its level of adoption, projections, service providers, consumer attitude and other.
- Depending on data availability, the following types of information were included: top trends of the digital healthcare market and technological advances, state of development, medical and wellness applications' number of users and market values. Not all types of data mentioned were included for each section due to varying information availability.

DEFINITIONS

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The following expressions and definitions are used in this market report*:

▪ **DIGITAL/VIRTUAL/ REMOTE HEALTH**	The broad scope of digital health includes categories such as mobile health (mHealth), health informatio (IT), wearable devices, telehealth and telemedicine, and personalized medicine. Digital health technologies u puting platforms, connectivity, software, and sensors for health care and related uses. These technologies span a wide range of uses, from applications in general wellness to applications as a medical device. They include technologies intended for use as a medical product, in a medical product, as companion diagnostics, or as an adjunct to other medical products (devices, drugs, and biologics). They may also be used to develop or study medical products.
▪ **TELEMEDICINE/ TELEHEALTH**	Telehealth is the distribution of health-related services and information via electronic information and telecommunication technologies. It allows long-distance patient and clinician contact, care, advice, reminders, education, intervention, monitoring, and remote admissions.
▪ **HEALTH TECHNOLOGY**	Application of organized knowledge and skills in the form of devices, medicines, vaccines, procedures, and systems developed to solve a health problem and improve quality of lives.
▪ **VIRTUAL VISITS/TELEVISITS**	Tele visits allow healthcare providers to examine their patients in a remote setting via audio or video connection. This can be used for follow-up, introductory consultation, simple acute illness, adjusting therapy, among others
▪ **GENOMICS**	Genomics is an interdisciplinary field of biology focusing on the structure, function, evolution, mapping, and editing of genomes. A genome is an organism's complete set of DNA, including all of its genes.
▪ **WEARABLES**	Smart electronic devices (electronic device with micro-controllers) that are worn close to and/or on the surface of the skin, where they detect, analyze, and transmit information concerning e.g., body signals such as vital signs, and/or ambient data and which allow in some cases immediate biofeedback to the wearer.
▪ **DIGITAL PHARMACIES**	A pharmacy that operates over the Internet and sends orders to customers through mail, shipping companies, or online pharmacy web portal.

Note: *the definitions used by the original sources might differ from the ones stated on this chart; the exact definition used by each source, where available, is included on the respective charts

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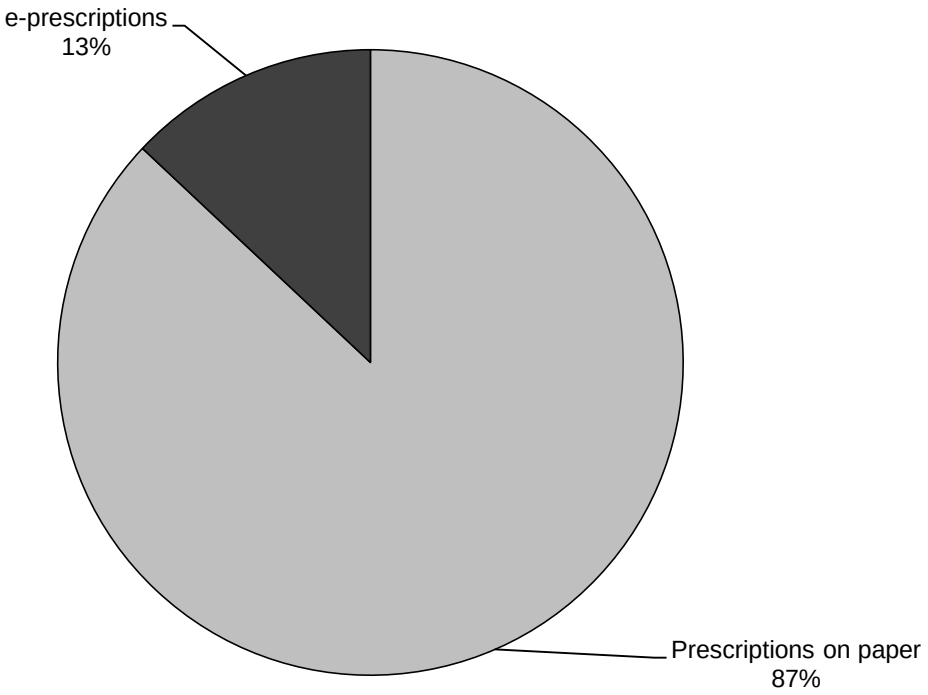
The share of electronic prescriptions in Germany is … reach 13% of total prescriptions as of 2023.

Germany: Breakdown of Prescriptions That Will Be on Paper vs Digital, in % of all Prescripti…



Survey: based on a survey of various healthcare stakeholders, conducted between 2nd September – 7th September 2022
Source: Gesund.de cited by DAZ.online, September 2022

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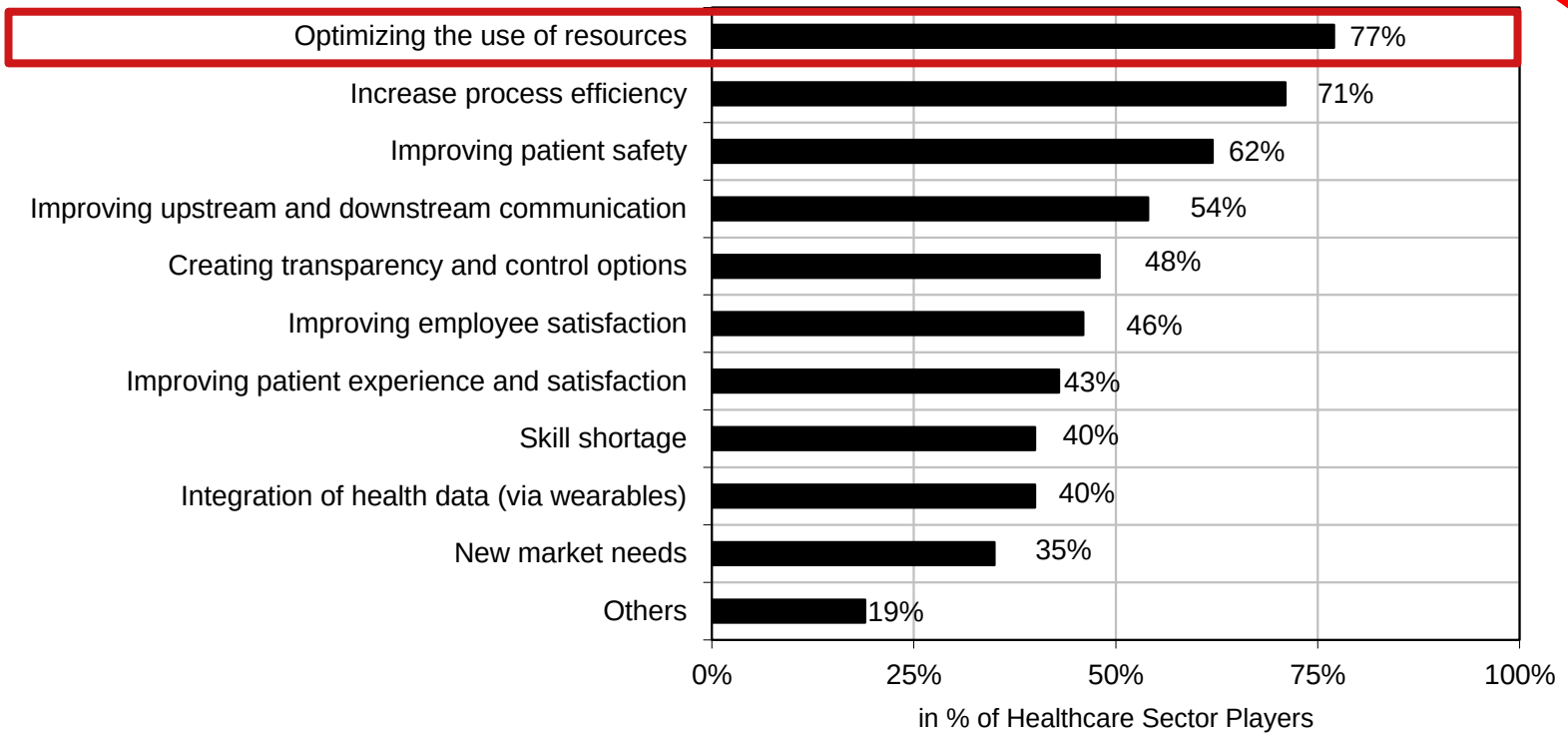
In Austria, "optimizing use of resources" was the top [illegible] digitalization among 77% of healthcare sector players as [illegible]?

Austria: Top Drivers for Digital Transformation, in % of Healthcare Sector Players, October 2[illegible]



Note: does not add to 100% due to multiple answers possible

Survey: based on a survey of 150 Austrian players in the healthcare sector. The participants consisted of representatives of hospitals, hospital operating companies, health centers, diagnostic centers, social security institutions, long-term care organizations, and rehabilitation centers, conducted between June – October 2022; question asked: "What drivers do you see for digitalization/digital transformation?"

Source: KPMG & SOLVE, December 2022

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