

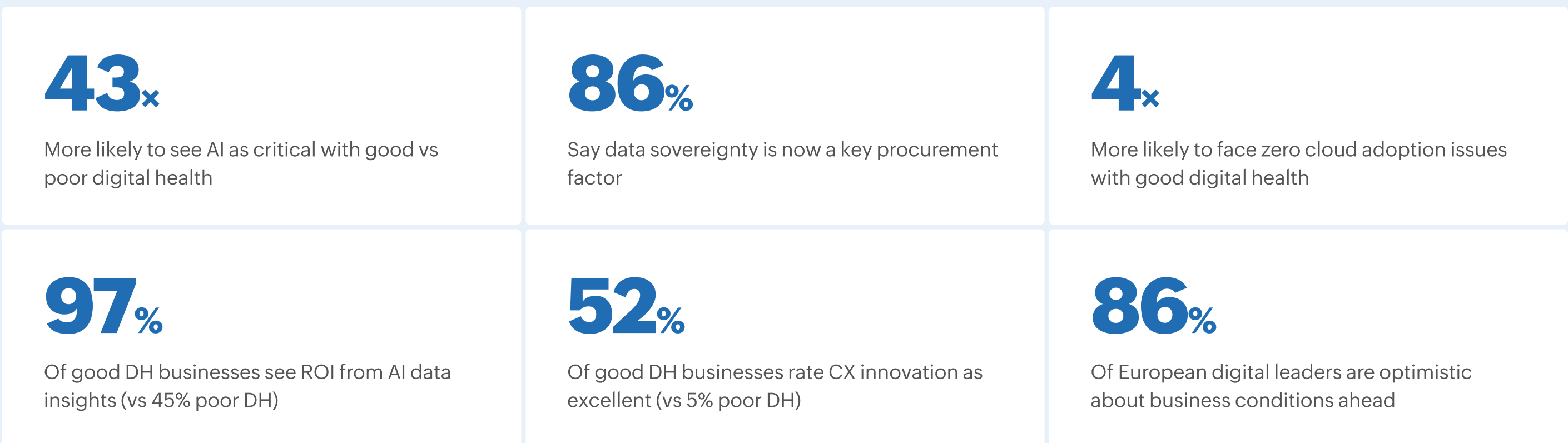


Europe Digital Health Study 2026

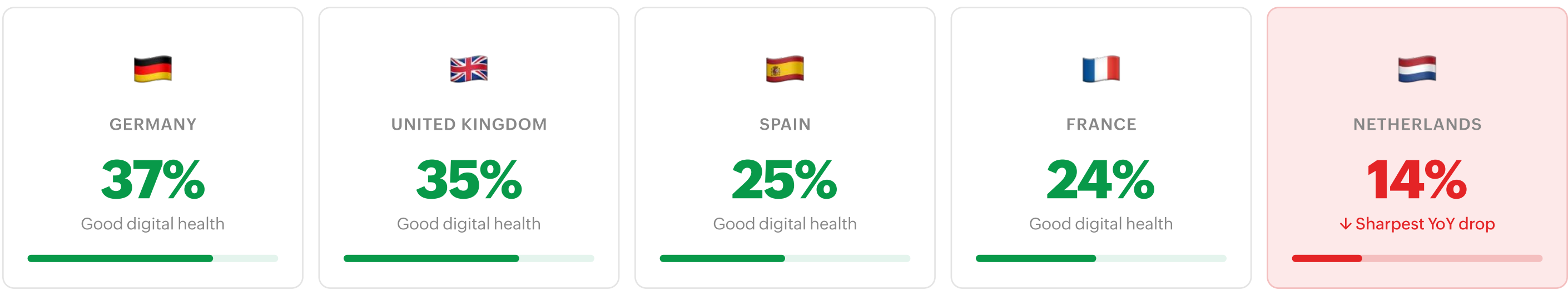
The verdict on AI returns, customer experience, cost control, and competitive resilience



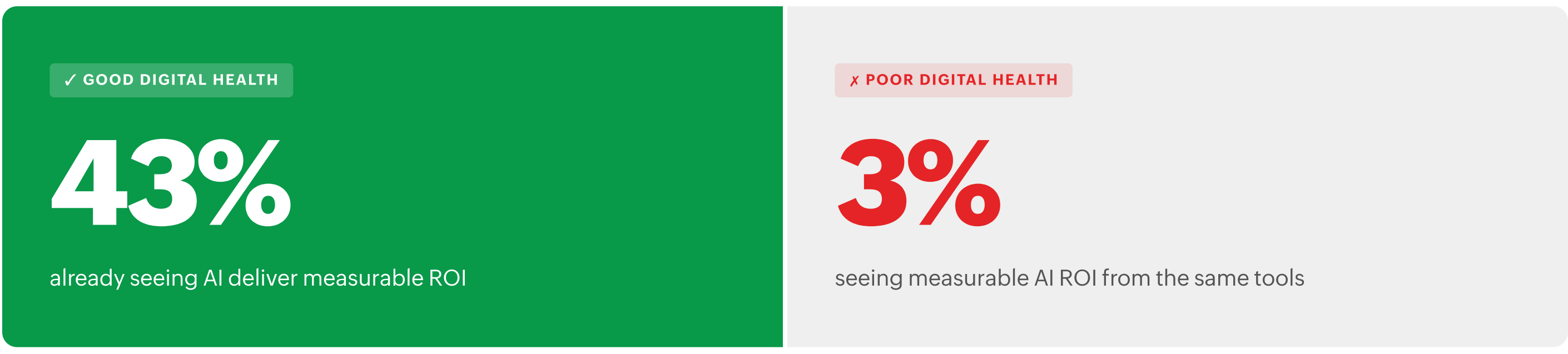
SIX NUMBERS THAT DEFINE THIS YEAR'S STUDY



DIGITAL HEALTH BY COUNTRY — PERCENTAGE RATED 'GOOD'



AI RETURNS — SAME TECHNOLOGY, ENTIRELY DIFFERENT OUTCOMES

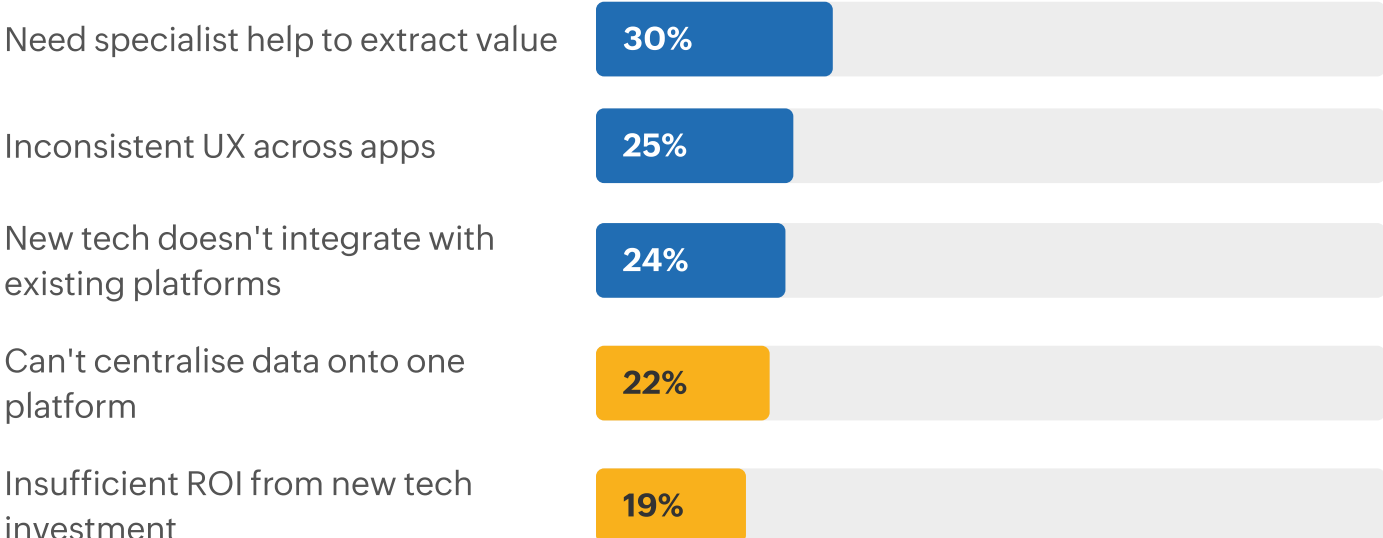


THE DIGITAL HEALTH DIVIDE — SELECTED OUTCOMES

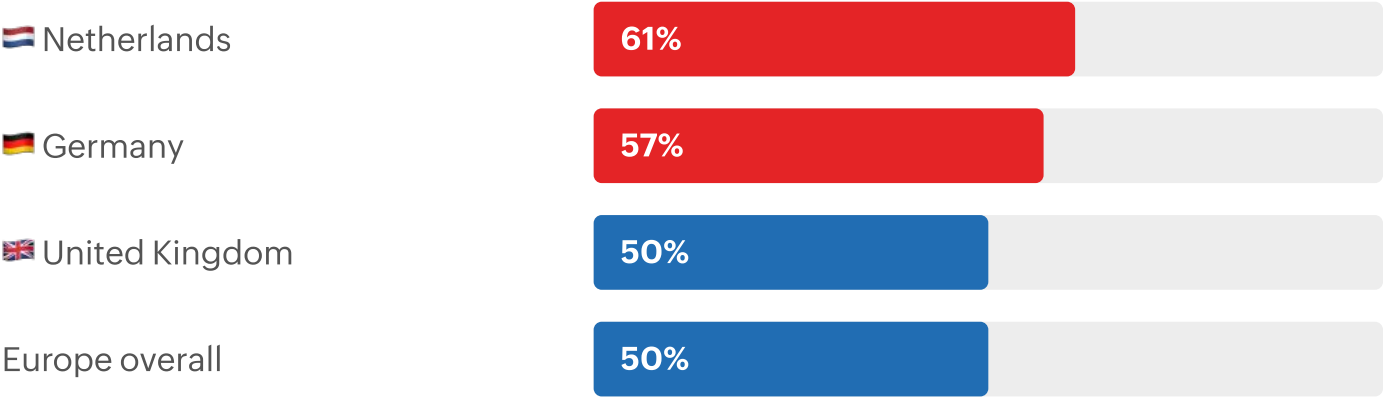
METRIC	✓ GOOD DIGITAL HEALTH	✗ POOR DIGITAL HEALTH
AI seen as critical to success	43%	3%
CX innovation rated excellent	52%	5%
Data privacy seen as critical	57%	27%
Zero cloud adoption issues	28%	7%
Digital tools very important for employee experience	86%	23%
Majority of operations running digitally	36%	9%

CLOUD, COSTS & TRANSFORMATION

Top cloud adoption challenges (2026)



Rising platform costs — businesses reporting increases



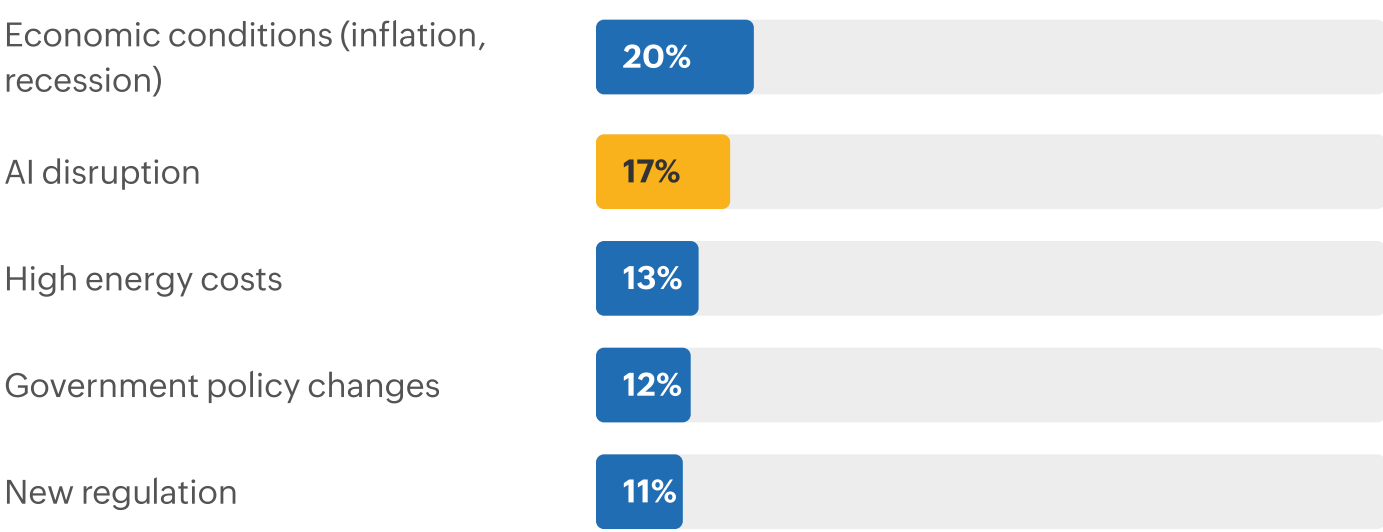
18% experiencing 'shrinkflation' — paying the same or more, getting less

DATA SOVEREIGNTY — FROM COMPLIANCE TO BOARDROOM AGENDA



MACRO OUTLOOK & TRANSFORMATION PAYOFFS

Top external concerns beyond their control



"The gap between businesses with good and poor digital health is not a technical footnote. It shows up in revenue-critical outcomes: customer loyalty, AI return on investment, innovation capability, and the ability to attract and retain great employees."

SRIDHAR IYENGAR · MANAGING DIRECTOR, EUROPE, ZOHU