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AI Digital Health Landscape: Big Tech, Pharma & Startups

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Published by IntuitionLabs · 2026-04-14 · digital health · ai in healthcare · digital therapeutics · healthtech startups · pharma ai · telemedicine

Original article: https://intuitionlabs.ai/articles/ai-digital-health-landscape-tech-pharma-startups



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Executive Summary

The **digital health** sector – encompassing telemedicine, wearables, electronic health records (EHR), **AI-driven diagnostics**, and **digital therapeutics** – has emerged as a major frontier at the intersection of technology and medicine. By 2026, this market is measured in hundreds of billions of dollars and is growing rapidly. Estimates project the global digital health market at roughly **$268.4 billion in 2024**, rising at an annual rate of nearly **18%** to exceed **$1 trillion by the early 2030s** (hackmd.io) (www.eutechfuture.com). Venture funding has likewise rebounded: U.S. digital health startups raised **$14.2 billion in 2025** (up 35% from 2024) (rockhealth.com), and worldwide startup funding reached about **$29.7 billion in 2025** (www.galengrowth.com). J.P. Morgan describes AI and automation as central to health-technology trends in 2025 (J.P. Morgan report).

This report examines how three player groups – **Big Tech companies**, **pharmaceutical & life-sciences firms**, and **digital health startups** – are competing and collaborating in "AI-powered healthcare." Big Tech (Amazon, Alphabet/Google, Microsoft, Apple, etc.) brings vast data/AI capabilities and consumer reach; Pharma brings clinical expertise, R&D scale, and regulatory know-how; Startups bring agility and niche innovation. We analyze their strategies, highlight real-world case studies, and survey the current data. Key insights include:

- **Big Tech's forays**: Amazon, Google, Microsoft, Apple and others are leveraging their AI and cloud platforms to enter healthcare. Examples include Microsoft's **Copilot Health** (an AI tool synthesizing medical records and wearable data (www.axios.com)), Google's **Google Health Coach**, built with Gemini (Google announcement) and Amazon's **Health AI** chatbot (with sign-ups through Amazon Health (Amazon announcement)). These tech giants emphasize consumer-friendly health apps and infrastructure, though they must navigate HIPAA/privacy regulations. In interviews, industry leaders recognize both the promise and caution of AI – for example, Bayer's Sebastian Guth notes that "AI at scale" can develop novel medicines at speeds once unattainable (www.axios.com).
- **Pharma and biotech's digital push**: Major Pharmaceutical firms are aggressively adopting AI and digital platforms, especially for R&D. Companies like **AstraZeneca, Pfizer, Roche, Novartis, and Eli Lilly** use AI to sift genomics and real-world data faster (moneyweek.com) (www.axios.com). For instance, AstraZeneca's CDO Jim Weatherall reports that "data science and AI are transforming R&D…

[applying AI] throughout the discovery and development process, from target identification to clinical trials" (moneyweek.com). Nvidia's CEO highlighted Lilly's effort to build an AI-powered " scientific supercomputer" for drug research (www.axios.com). Simultaneously, Pharma is exploring **digital therapeutics** (software-based treatments): for example, FDA cleared *Rejoyn* through the 510(k) pathway in 2024 as a prescription digital therapeutic intended as an adjunct for symptoms of major depressive disorder (FDA clearance letter) (dev.time.com), and Pfizer, Roche and others are developing drug-plus-software combos (www.axios.com). Insurers and regulators, however, are still debating reimbursement and standards (www.axios.com).

- **Digital health startups**: Hundreds of startups pursue AI-health niches – from telehealth platforms to AI diagnostics to mental-health apps. For example, firms like **Exscientia** and **BenevolentAI** use machine learning to accelerate drug discovery (www.eutechfuture.com), while Rejoyn received FDA 510(k) clearance for MDD symptoms as an adjunct to clinician-managed outpatient care for adults aged 22 or older with MDD who are taking antidepressant medication (FDA Rejoyn clearance). Telemedicine startups (Teladoc, Amwell), remote-monitoring platforms, and "wellness" apps have cleaned up funding in recent years. Funding data are striking: VCs funneled **$29.7 billion** into global digital health startups in 2025 (www.galengrowth.com), concentrated in key clusters (Health Management Solutions: $5.5B; Biopharma R&D tools: $4.5B; Diagnostics: $2.6B (www.galengrowth.com)). In Galen Growth's HealthTech 250 analysis, **19% of partnerships involving ventures in the Health Management Solutions cluster were with Big Tech** (www.galengrowth.com), reflecting how startups often work with larger incumbents (and in many cases get acquired by them). However, "point solution fatigue" has set in: narrow AI tools must now prove real value across patients, providers, and payers (www.axios.com).

Table 1 below summarizes key metrics and trends in the AI-driven digital health landscape:

Metric / Indicator	Value / Description	Reference
Global digital health market (2024)	~$268.4 billion	Verified Market Reports (hackmd.io)
Global digital health market (2033, proj.)	~$1.15 trillion (CAGR ~18%)	Verified Market Reports (hackmd.io)
U.S. digital health venture funding (2025)	$14.2 billion (35% ↑ from 2024's $10.5B)	Rock Health (rockhealth.com)
Global digital health startup funding (2025)	$29.7 billion	Galen Growth (www.galengrowth.com)
AI and automation in health technology (2025)	Described as central to nearly every dominant trend	J.P. Morgan report
FDA-cleared prescription digital therapeutic	*Rejoyn*, cleared through 510(k) for MDD symptoms as an adjunct to clinician-managed outpatient care for adults aged 22 or older with MDD who are taking antidepressants	FDA decision and indication ; Time (dev.time.com)
Quarterly funding trend (Q4 2025, US)	$4.2 billion (highest Q since mid-2022)	Rock Health (rockhealth.com)

Table 2 (below) contrasts the roles and strategies of Big Tech, Pharma, and startups:

Stakeholder	Key Players (2026)	Focus / Initiatives	Strengths (Assets/Resources)	Challenges
Big Tech / IT firms	Alphabet/Google (Fitbit) Amazon (AWS, Pharmacy, Care) Microsoft (Azure, Copilot) Apple (HealthKit, Watch) Meta (VR/AI)	Consumer health apps and cloud services; AI diagnostics and assistants; health device integration	Massive capital & data (cloud); advanced AI/ML tech; consumer reach & platforms; agile R&D	Health privacy regulations (HIPAA/GDPR); medical ROI uncertain; patient trust in tech; navigating clinical workflows
Pharmaceutical & Life Sciences	Pfizer, Roche, Novartis, J&J, Eli Lilly, AstraZeneca, GSK, Biogen, etc.	Drug discovery (AI/ML models), clinical trial efficiency, precision medicine; digital therapeutics; supply-chain (distribution/logistics)	Deep clinical & regulatory expertise; large R&D budgets; global trial data; manufacturing pipelines; health care relationships	Legacy R&D cycle length; regulatory compliance; slower culture for tech adoption; competition from tech entrants (e.g. Amazon Pharmacy)
Health Startups	Teladoc, Amwell, Lyra Health, PathAI, Tempus, Caption Health, Livongo/Teladoc, One Medical (acq.), many others	Niche solutions: telemedicine; AI imaging diagnostics; patient monitoring; chronic care management; mental health apps; data analytics	Agility; rapid innovation; specialized AI talent; low overhead; ability to pivot; tight focus on user needs	Funding volatility; scale-up challenges; regulatory approval hurdles; need to partner/acquire to reach scale (often exit via acquisition)

Table 2: Comparative snapshot of digital health player groups (Big Tech vs. Pharma vs. startups), 2026 (examples and generalizations).

A few points from this comparison table and our analysis:

- **Partnerships and convergence**: The lines between these groups are blurring. For instance, Galen Growth's HealthTech 250 analysis reports that 19% of partnerships involving ventures in the Health Management Solutions cluster were with Big Tech firms (www.galengrowth.com). Tech giants often collaborate with pharma: e.g., NVIDIA partnering with Eli Lilly to build an AI supercomputer for drug research (www.axios.com), or Google Cloud working with J&J in vaccines. Pharma companies license or acquire startups (e.g. Roche's buyout of Flatiron for oncology data). Conversely, Amazon (big tech) entered pharmaceuticals via its acquisition of online pharmacy **PillPack** and its purchase of One Medical (a primary care chain). Thus, competition coexists with alliances: incumbents often "coopete" (cooperate+compete) in this ecosystem.
- **Value propositions**: Big Tech focuses on consumer-facing experiences and infrastructure. Amazon aims to "consumerize" healthcare via convenient pharmacy and telehealth, with Health AI sign-ups through Amazon Health (Amazon announcement). Apple's announced Health app redesign was scheduled for later in 2026, starting in U.S. English (Apple announcement). Pharma, in contrast, offers therapeutic products and clinical insights: they increasingly use AI for drug discovery efficiency (e.g. Bayer's recent statements on AI in R&D (www.axios.com)) and for novel drug-device combos. Startups typically target specific pain points – an insurance navigation app, a diabetes coaching device, an AI for reading lung scans – and often raise capital on the promise of leveraging AI or big-data.

- **Regulatory and trust issues**: All three must navigate complex healthcare regulations. Big Tech must comply with the privacy laws applicable to each service and data flow. HIPAA applies to covered entities, business associates, and covered health information; a vendor's statement about a "HIPAA-compliant environment" is not a blanket compliance determination for every interaction. Pharma is accustomed to rigorous FDA oversight for drugs and is now engaging with FDA frameworks for digital therapeutics (e.g. the FDA's Prescription Digital Therapeutics guidance). Patients and providers remain cautious. A retrospective observational study at four Polish endoscopy centres associated exposure to AI with lower adenoma detection during subsequent non-AI-assisted colonoscopy; this does not establish causation or general physician deskilling (study abstract). Even AI leaders insist on caution: Sam Altman said he would **"not want to trust [his] medical fate to ChatGPT with no human doctor in the loop"** (www.windowscentral.com).

Below, we detail each segment, examine data trends, and present case studies that illustrate these dynamics.

Introduction and Background

Digital health broadly refers to the use of digital technologies to deliver, improve, or innovate healthcare. This spans telemedicine, electronic health records, mobile health apps, genomics, AI diagnostics, wearable biosensors, and **digital therapeutics** (software-based treatments). In the 2010s, innovations like smartphone health apps and Fitbit watches began to shift consumer health, but traditional healthcare institutions remained slow to change. The COVID-19 pandemic (2020-2021) spurred a major leap: telehealth visits soared as in-person care contracted. At the same time, massive amounts of healthcare data (EHR records, imaging, genomics) became more accessible for analysis.

Concurrently, advances in artificial intelligence – especially deep learning and large language models (LLMs) – ignited hopes for "AI-powered healthcare." Tech companies (including the life-sciences projects that became Alphabet company Verily in 2015 (X's history)) and regulators (e.g. the FDA's Digital Health Innovation Plan) have signaled that digital medicine is a strategic frontier. By 2026, **generative AI** (like ChatGPT/Gemini) is moving into healthcare contexts, and companies as diverse as Apple and Pfizer are discussing "AI chatbots" and "AI doctors." However, regulators and ethicists urge caution: AI's rapid progress raises novel issues (e.g. data privacy, algorithmic bias) that medicine must reckon with.

This report examines the **competitive landscape of AI-powered healthcare**, focusing on three spheres of players: Big Technology companies (often non-healthcare tech giants), traditional pharmaceutical/biotech companies, and startups in the digital health space. We analyze their roles, investments, strategic moves, collaborations, and the regulatory environment shaping them. Extensive data and real-world examples illustrate how by 2026 the interplay between these sectors is transforming healthcare delivery, R&D, and patient engagement.

A snapshot of the scale and growth of this market is shown in **Table 1** above: the global digital health industry is forecast to expand from the hundreds of billions today into a multi-trillion-dollar market within a decade (hackmd.io) (www.eutechfuture.com). Concurrently, investment patterns show rejuvenated VC interest (driven

largely by AI-related innovations): after a few lean years, digital health funding surged in 2025 (rockhealth.com), and major deals increasingly involve AI tools (www.axios.com). Against this backdrop, our sections below dissect each major group's approach.

Big Tech Companies in Healthcare

Major technology firms view healthcare as an attractive, high-growth opportunity where their data- and AI-powers can be game-changing. We consider the key players individually:

Microsoft

Microsoft has steadily expanded its healthcare pivot. Its cloud division (Azure) hosts many health data and AI workloads, and it completed its acquisition of Nuance Communications in March 2022 (Microsoft completion announcement). In March 2026 Microsoft unveiled **Copilot Health**, an AI service allowing users to upload EHRs and wearable data (from Apple Health, Fitbit, Oura, etc.) so the AI can generate personalized health insights (www.axios.com). Copilot Health can pool records from ~50,000 U.S. providers and dozens of wearable devices (www.axios.com). Microsoft's leadership frames healthcare as "the most important application of AI, full stop" (www.axios.com). They argue Microsoft's longstanding data-security expertise makes it well-suited for sensitive medical data. Like Apple or Google, Microsoft positions itself not as a doctor replacer but as an "AI assistant" for consumers and clinicians. Nonetheless, critics caution about overreach in health – and Microsoft's tool promises encryption and patient control, yet skeptics ask whether people will trust an AI with their full medical histories (www.axios.com). On the enterprise side, Microsoft also invests in hospital workflows (e.g. Microsoft Cloud for Healthcare) and is reportedly partnering with Epic/Cerner for EHR analytics.

Alphabet/Google

Google's healthcare efforts include Fitbit, Google Health (an internal division), and DeepMind (AI research, especially imaging). In practice, Google often integrates health features into consumer products rather than unveiling hospitals-specific tech. Google's May 2026 announcement said **Google Health Coach** would leave preview and become globally available through Google Health Premium starting May 19 (Google announcement). The Coach provides more accurate sleep tracking and can access a user's medical records for context. Google collaborated with AI data platform b.well and identity firm Clear to let users link EHR data into Fitbit (www.androidcentral.com). Thus, if a Fitbit user asks "How can I improve my cholesterol?", the AI can analyze their actual lab results and medication list for personalized advice (www.androidcentral.com). Google also rolled out CGM (continuous glucose monitor) integration, showing how foods or activities affect blood sugar (www.androidcentral.com). These examples show Google leveraging its AI (Gemini) and strong consumer devices to create an integrated personal health assistant (though linking medical records raises privacy questions).

Verily became an independent company in 2026 (X's Verily profile). Still, Google continues to fund AI medical research (e.g. AI predicting insulin resistance published in *Nature* (www.androidcentral.com)). The company's strategy seems to combine consumer products (WearOS, Pixel devices, Fitbit) with platform-level AI and cloud tools for health data.

Apple

Apple's healthcare presence centers on the iPhone/Watch ecosystem and stringent privacy branding. The Apple Watch ECG app is FDA-cleared (FDA 510(k) record); fall detection is a separate consumer safety feature described by Apple and is not an FDA-cleared medical-device function (Apple support). The Health app aggregates data across third-party devices. Apple's September 2026 announcement described a redesigned Health app scheduled for later in 2026, initially in U.S. English, with additional languages to follow (Apple announcement). Apple's Health app supports optional iCloud backup and synchronization as well as user-authorized sharing. Apple says it cannot read health and activity data synced to iCloud when the user has iOS 12 or later and two-factor authentication enabled (Apple privacy notice).

Apple also expanded its clinical capabilities: Australia's TGA included the Hypertension Notification Feature in the ARTG as software that analyzes Apple Watch PPG data for patterns suggestive of hypertension and notifies the user. The feature is not intended to diagnose hypertension, monitor treatment effects, or serve as blood-pressure surveillance (TGA ARTG list). Apple is also funding research (e.g. heart studies, sleep studies) and allows Health Records linking in its app (memoranda of medical data privacy are constant). In July 2025, Apple announced that chief operating officer Jeff Williams would hand over that role to Sabih Khan later that month and continue overseeing its Health initiatives during the transition; the announcement said Williams would retire later in 2025 (Apple succession announcement). In sum, Apple leverages its hardware ecosystem and AI (returning to Siri/Gemini) to deepen health features; the tradeoff is that Apple remains consumer-centric rather than a direct healthcare provider.

Amazon

Amazon's healthcare strategy uses its e-commerce, cloud, and data assets. Amazon acquired **PillPack in 2018** (PillPack ownership record), launched **Amazon Pharmacy in November 2020** (launch announcement), and completed its acquisition of **One Medical in February 2023** (completion announcement). In March 2026, Amazon launched **Amazon Health AI**, with sign-ups through Amazon Health (Amazon announcement). It is described as a "personalized health agent" that knows the user's history, can recommend Amazon Pharmacy products, and connect to One Medical doctors (www.techradar.com). Amazon states that connecting health records to Health AI is optional and that conversations involving connected One Medical information are protected by HIPAA (Amazon announcement). Amazon's pitch: use AI to ease triage and patient engagement for its retail and telehealth ecosystem. Users can choose whether to connect relevant health records, and Amazon states that this information is used to personalize Health AI responses (Amazon announcement).

Beyond the chatbot, Amazon's broader moves include: offering same-day Rx delivery to compete with Walmart and CVS (www.axios.com); using AWS to host healthcare apps (Amazon's cloud is already #1 for health data storage); and internal experiments (like the now-defunct Haven health joint venture). Amazon's Alexa voice assistant also has some health skills (medication reminders etc.). Unlike Apple, Amazon's core is retail and cloud: its healthcare push may primarily aim to lock in pharmacy/consumables. Indeed, analysts note that Amazon's effect on pharmacies is more "retail disruption" than medical expertise (www.axios.com). Still, Amazon uniquely sits at the border of e-commerce, logistics, and medicine, and its AI projects signal strong ambitions to "consumerize" health care (www.axios.com).

Other Tech Players

- **IBM**: IBM's Watson Health division largely wound down by 2023; IBM now focuses on enterprise IT for healthcare (insurance, hospital outsourcing). Historically IBM touted AI diagnostic systems, but no major new Watson initiatives are public.
- **Meta (Facebook)**: So far, Meta's healthcare role has been minor – projects like online support communities or VR therapy prototypes.
- **Samsung and others**: Samsung's Galaxy Watch competes with Apple Watch; Samsung's April 2020 announcement already described blood-pressure monitoring on Galaxy Watch Active2, with availability varying by market (Samsung announcement). Samsung's strategy ties into its partnership with Google for WearOS (Fitbit integration). Other tech firms (e.g. Qualcomm, Intel) work on health sensors/chips, and **Fitbit** (under Google) is heavily integrated.

Evidence, for example, shows Big Tech leveraging AI and partnerships. Galen Growth reports that in health management solutions (the largest startup funding cluster), **19% of startup partnerships** are with Big Tech firms (www.galengrowth.com). Microsoft's Mustafa Suleyman calls healthcare "the most important application of AI" because people query symptoms *millions of times per day* (www.axios.com). Big Tech consistently markets AI features "powered by Google Cloud" or "in Microsoft Azure" to underscore their AI credentials, while claiming to solve historical pain points (interoperability, patient engagement, administrative burden). In interviews, tech CEOs compete for credibility: even OpenAI's Sam Altman (a proxy for the AI industry) emphasized that despite generative AI's prowess, he still trusts a human doctor over ChatGPT when it comes to his own health (www.windowscentral.com). Such statements highlight both AI's promise and the caution that exists.

Pharmaceutical & Life-Sciences Industry Trends

Pharmaceutical and medical-device companies have long been data-rich institutions (e.g. patient samples, clinical trials, chemical libraries), but only recently has AI begun to unlock that data in scale. By 2026, virtually all major pharma firms describe AI and digital health as strategic priorities for R&D and patient care:

- **Drug Discovery and Development**: AI accelerates drug discovery. For example, AstraZeneca reports using AI from early target identification through trials (moneyweek.com). The CEO of Nvidia predicts a paradigm shift: talking in Davos 2026, Jensen Huang said drug research is moving from "wet lab" to AI-powered platforms (www.axios.com). Eli Lilly itself partnered with Nvidia on an AI supercomputer for drug R&D (www.axios.com). Independent startups (Insitro, Ginko Bioworks, Recursion) are also winning pharma funding. McKinsey and industry analyses forecast that by the late 2020s, AI could cut R&D time and costs significantly (though full "magic bullet" benefits remain debated).
- **Clinical Trials and Real-World Evidence**: The clinical-trial bottleneck is attracting AI solutions. A *Time* report (2026) highlights Formation Bio – a startup using AI to cut trial timelines by ~50% through better recruitment and data analysis – then flipping successful drug candidates to big Pharma (Sanofi, Lilly) (time.com). Pharma incumbents are watching: the same article notes that actual FDA approvals remain

~50/year, unchanged despite AI hype, indicating trials (not just discovery) may be the bigger bottleneck. Digital health trial solutions (e-consent, remote monitoring, adaptive trial designs) are areas where Pharma is investing.

- **Digital Therapeutics (DTx)**: There is an emerging recognition that **software itself can be medicine**. FDA has cleared certain prescription digital therapeutics through device pathways—for example, *Rejoyn* in 2024 as an adjunctive treatment for MDD symptoms (FDA clearance letter) (dev.time.com), and other mental health apps are under review. Bayer and One Drop announced an agreement in August 2020 to jointly develop digital health products for multiple therapeutic areas (Bayer announcement). The idea is to improve patient compliance and outcomes. As Axios noted in 2024, such "drugs with apps" are a new frontier – potentially making brand drugs stickier and regulated like combination products (www.axios.com). Pharma trade groups are keeping a close eye on FDA guidelines (to ensure digital adjuncts meet quality standards) (www.axios.com). In the EU, Member States designate accredited notified bodies to conduct medical-device conformity assessments. EMA provides technical and scientific support to expert panels involved in certain high-risk device assessments (EMA medical-device overview).
- **Patient Support and Chronic Care**: Many pharma companies back digital platforms for patient management. For instance, Pfizer, Roche and others are piloting apps and wearables for chronic disease monitoring (diabetes coaching, oncology symptom tracking). An Axios report noted that drugmakers are crafting "drug-AI hybrids" – e.g., wearable-enabled dosing algorithms – to personalize therapies (www.axios.com). These range from smartphone apps reminding patients to take chemo to predictive models for side effects. Pharma's role here often involves collaborations: Novartis and Roche have worked with tech partners and hospitals to deploy remote monitoring in cancer or heart disease.
- **Structure and Investment**: Some pharma firms have created dedicated AI divisions (e.g. Novartis's AI incubator, GSK's AI labs). They also make large investments: for example, GSK announced a **$1.2 billion investment in advanced manufacturing facilities, AI and advanced digital technologies** in 2025, as part of its broader **$30 billion U.S. R&D and supply-chain infrastructure plan** (GSK announcement). Novartis committed $23 billion to U.S. operations over 5 years, partly to bolster new tech-enabled supply chains (www.axios.com). The picture emerging is that Pharma sees AI/digital as necessary to future competitiveness, akin to how chemistry was decades ago. As Bayer's Guth put it, AI at scale can let us develop medicines "that would otherwise likely not have seen the light of day" (www.axios.com).

However, pharmaceutical firms also encounter friction: internal resistance to change, regulatory caution, and competition from tech entrants. Some critics ask whether Big Tech (with fewer regulatory constraints) might undermine Pharma's traditional control of patient data. Furthermore, the policy environment is shifting. In the U.S., Medicare covers telehealth services received anywhere in the country, including at home, through December 31, 2027 (Medicare coverage). In Europe, the European Health Data Space Regulation was published in March 2025 and has phased implementation (European Commission EHDS overview). The EU AI Act entered into force in August 2024 and became applicable in August 2026, with exceptions (European Commission timeline). Pharma companies are closely monitoring these regulations to adapt their digital health pipelines responsibly.

Finally, **pharma's own M&A** reflects digital trends. Besides acquiring other drug companies, leading pharmas and medtech firms have bought data/AI startups: e.g. Roche's 2018 purchase of Flatiron Health (oncology data), Pfizer's investments in genomics AI, or Sandoz (formerly part of Novartis (spin-off record)) partnering in telemedicine clinics. All these moves underscore that by 2026, no major life-science company is ignoring digital health – from R&D to patient engagement.

Digital Health Startups and the VC Landscape

The startup segment is vast and varied. Thousands of ventures worldwide target pieces of the healthcare puzzle. Investors poured **~$29.7 billion into digital health startups in 2025** (www.galengrowth.com), a hefty sum distributed unevenly across sectors (and mostly in later-stage rounds). Rock Health reports that U.S. startup funding alone hit **$14.2 billion in 2025** (rockhealth.com). The chart below illustrates the 2025 US funding surge, with a record $4.2 billion in Q4 (rockhealth.com):

- **Funding Trends**: Despite a mid-cycle slump (2022–2023 slowdown after pandemic hype), funding rebounded in 2025. However, this growth was driven by **mega-rounds**: the average deal size rose from $20.7M (2024) to $29.3M (2025) (rockhealth.com), and "mega-deals" (> $100M) accounted for **42% of capital** in 2025 (rockhealth.com). Only a handful of companies captured much of the capital; Rock Health notes that removing the top 9 funded startups would actually make 2025's total fall below 2024's (rockhealth.com). This polarization means breakthrough AI-driven startups (often in rounds >$200M) are setting new records, while many smaller entrepreneurs find funding tight.
- **Hot Clusters (Galen Growth analysis)**: Galen Growth's "HealthTech 250" report (Nov 2025 data) identifies the leading digital health clusters by investment (www.galengrowth.com):
- **Health Management (Operational)**: $5.5B in 2025 (19% of total) was invested in companies improving healthcare operations (e.g. hospital IT, coding, patient flow) (www.galengrowth.com). Notably, **32%** of partnerships in this cluster are with health systems and **19% with Big Tech firms**, indicating strong ecosystem ties (www.galengrowth.com).
- **Biopharma R&D Solutions**: $4.5B (16%) went to AI-driven drug discovery and trial accelerators (www.galengrowth.com), i.e. companies that help pharma innovate with less risk. These firms handle "massive datasets and real-world data" to improve target selection and failure rates (www.galengrowth.com). Many are direct startup R&D arms, e.g. deep learning biology companies.
- **Medical Diagnostics and AI**: $2.6B (10%) into AI diagnostics (image interpretation, lab analytics) (www.galengrowth.com). Over half of these ventures started outside the U.S. (often leveraging strict EU regulations and data) (www.galengrowth.com). This includes AI radiology, dermatology, pathology startups.
- *(Other areas like patient engagement or digital therapeutics receive smaller shares yet often command attention on PR.)*
- **Representative Startups**: Illustrative examples give flavor:

- *Telemedicine*: **Teladoc** (telehealth platform) completed a $18B merger with Livongo (chronic care) in 2020. Teladoc announced a leadership transition in April 2024 (Teladoc Health announcement). Medicare covers telehealth services received anywhere in the U.S., including at home, through December 31, 2027 (Medicare coverage).
- *AI Diagnostics*: Companies like **Tempus** (cancer analytics), **Caption Health** (AI for ultrasound guidance), and **Aidoc** (AI radiology alerts) earned hundreds of millions in rounds. These startups train models on imaging or genomic data to assist clinicians.
- *Digital Therapeutics*: Companies including Pear Therapeutics, Omada Health, and Click Therapeutics have developed digital interventions for addiction, insomnia, diabetes, depression, and other conditions; regulatory status varies by product. FDA granted reSET's De Novo classification request. Its indication is a 12-week prescription-only adjunct to contingency management for patients aged 18 or older with substance use disorder in clinician-supervised outpatient treatment, who are not currently on opioid replacement therapy, who do not abuse alcohol solely, or who do not abuse opioids as their primary substance of abuse (FDA reSET review). Rejoyn received 510(k) clearance for MDD symptoms as an adjunct to clinician-managed outpatient care for adults aged 22 or older with MDD who are taking antidepressants (FDA Rejoyn record).
- *Patient Tools*: Startups in mental health (e.g. Calm, Headspace, Lyra) and in medication savings (GoodRx, whose mission is to help Americans save time and money when filling prescriptions; its 2025 Form 10-K identifies affiliates of Silver Lake, Francisco Partners and Idea Men as holding approximately 93.8% of its combined voting power) (GoodRx 2025 Form 10-K) show consumer-facing digital health's huge scale.
- *Emerging*: Some AI health startups (e.g. **Insilico Medicine**, **Zebra Medical Vision**) sell platforms to pharma or hospitals; Roche announced a definitive merger agreement to acquire **PathAI** on May 7, 2026 (Roche announcement).
- **Investment Dynamics**: Many large VC and corporate funds target "AI native" healthtech. Rock Health notes "AI-native upstarts attracted huge rounds at unprecedented speed" in 2025 (rockhealth.com). Conversely, funding for me-too offerings or unvalidated platforms has cooled. As Axios observed, investors are shying away from startups selling "point solutions" to providers, preferring startups that serve payers or pharma with measurable ROI (www.axios.com). Publicly traded digital health firms have sometimes gone private or been acquired in 2024–2025 (per Rock Health), reflecting a shakeout.
- **Point-solution Fatigue and Survival**: Analysts caution that narrow AI healthcare tools must demonstrate broad value. A December 2025 Axios piece noted "point solution fatigue" – buyers expect tools to fit into workflows, avoid alert fatigue, and truly reduce costs (www.axios.com). Startups addressing one disease or one doctor's task struggle unless they integrate into larger systems. Those that survive often do so by partnering or exiting: e.g. telehealth pharmacy **Truepill** (once a unicorn) was sold to rival LetsGetChecked in 2024 for $525M (www.axios.com), aiming to combine labs, telemed, and pharmacy in one platform.

- **Global Game and Funding**: While much US data is available, the digital health startup scene is global. Europe has many health startups (aided by EU funding and digital health regulators), and Asia (China's Alibaba, Ping An) is a frontier. Galen Growth notes 56% of diagnostics startups came from outside the US (www.galengrowth.com). These non-US startups leverage their own regulatory regimes (e.g. CE-marking) and often enter US markets only later.

In summary, startups are the "innovation engine" of digital health, with hundreds of firms trialing AI-driven solutions. The majority will not scale independently; many aim to be acquired by Big Tech or licensed by Pharma. In Galen Growth's HealthTech 250 analysis, **19% of partnerships involving ventures in the Health Management Solutions cluster were with Big Tech** (www.galengrowth.com), underscoring that these upstarts often feed into larger ecosystems.

Competitive Dynamics and Ecosystem Interplay

At the heart of the landscape is the **interaction** between Big Tech, Pharma, and startups. This creates both cooperation and conflict, which we analyze along various dimensions:

- **Customer focus**: Big Tech tends to target **consumers** and patients, or enable providers with tech infrastructure. For instance, Amazon and Apple roll out direct-to-user services (chatbots, primary care membership, wearable alerts). Big Pharma traditionally sells to **providers and payers** (hospitals, doctors, insurance). Startups are split: some sell to providers (hospital AI tools), others to patients (apps), or to payers (analytics). This means Big Tech and Pharma sometimes compete for influence over the same end-users. Amazon Pharmacy competes in retail pharmacy alongside companies such as CVS and Walgreens (CVS Health 2025 Form 10-K). Similarly, Apple Watch's health features pit it against medical device companies (FDA sensors vs consumer gadgets).
- **Data and interoperability**: Every player values data. Big Tech controls massive non-medical user data (e.g. Google and Fitbit activity logs). Pharma has proprietary clinical trial and genomic data. Startups amass specialized datasets (e.g. millions of eye images). The future prospects hinge on **data sharing** vs. proprietary silos. Interoperability remains challenging: hospital EHRs are notoriously closed, limiting Big Tech's access to medical records (hence Apple and Google rely on patients linking their own portals (www.androidcentral.com)). At policy level, the U.S. and EU are pushing for better health data interoperability (e.g. TEFCA in U.S., standards like FHIR). Who controls the data gatekeeping will shape competitive advantage.
- **Value chain positions**: Consider a care pathway: an at-risk patient might wear a BP monitor (big tech device), have an app to remind medication (startup), see a doctor at a clinic (possible Big Tech telehealth or traditional hospital using Pharma therapies). Big Tech might own the "digital front door" (first line of interaction via apps). Pharma supplies the drugs or tests. Startups often offer the "middleware" – e.g. linking the app to the drug compliance. In practice, alliances form around patient care networks. For example, a **partnership ecosystem** might involve Apple Watch data going into a Telehealth startup which submits to a pharma-run patient portal for follow-up.

- **Market competition**: Big Tech companies sometimes compete indirectly with Pharma's traditional domains. Walgreen Co. was acquired by Sycamore Partners in 2025 and now operates as a private standalone company (Walgreens announcement). Google/Verily has invested in digital pill companies (Otsuka's digital Abilify). Insurance companies and large employers (like UnitedHealth/Optum) also are major players, bridging tech and care; but this report focuses on tech vs pharma. Still, it's worth noting that in healthcare, even payers are forming separate digital health initiatives, tying them into this competitive picture.
- **Regulatory environment**: FDA's Software Precertification pilot ended in September 2022 (FDA program history). Medicare covers telehealth services received anywhere in the U.S., including at home, through December 31, 2027 (Medicare coverage). The EU AI Act entered into force on August 1, 2024 and became applicable on August 2, 2026, with exceptions (European Commission timeline). Entry into force and application dates should be distinguished when assessing regulatory requirements.
- **Stakeholder perspectives**: A retrospective observational study at four Polish endoscopy centres associated exposure to AI with lower adenoma detection during subsequent non-AI-assisted colonoscopy; this does not establish causation or general physician deskilling (study abstract). Patients welcome convenience (remote care, health apps) but worry about privacy and reliability (hence Altman's reluctance (www.windowscentral.com)). Payers are concerned with outcomes/cost; they may favor tools proven to cut hospitalizations (which start-ups promise with RCT data). Venture investors want returns and thus push the companies to measurable metrics. Government agencies emphasize equitable access (e.g. deploying telemedicine to rural areas).

Case Study Example – Amazon vs. Traditional Pharmacy: Consider competition in prescription-drug distribution. At Amazon Pharmacy's November 2020 launch, Prime members received free two-day prescription delivery (launch announcement). CVS identifies Amazon, Walmart, and Walgreens as competitors in retail pharmacy and related consumer services (CVS Health 2025 Form 10-K). Analysts instead emphasize **consumer logistics and scale** in Amazon's pharmacy strategy. As Axios puts it, Amazon's influence "is less about its health care expertise and more about its retail behavior knowhow"—suggesting that Amazon may "consumerize healthcare in a very literal sense" (www.axios.com). Retail-pharmacy companies compete through store, delivery, and digital-service channels (CVS Health 2025 Form 10-K).

Data Evidence: Empirical data reflect this dynamic mix. Galen Growth reports that Health Management Solutions attracted $5.5 billion, representing 19% of total digital health startup investment in 2025 (Galen Growth). The Galen report also notes Big Tech's role: *"19% of partnerships [in Health Management Solutions] are with Big Tech"* (www.galengrowth.com), underlining that tech giants are seen as partners or acquirers by many startups. On the pharmaceutical side, funding for AI biotech (Insilico, Benevolent) has quietly crossed into the **billion-dollar** valuations for some due to pharma backing.

Synthesizing: Figure 1 below conceptually maps the digital health value chain across players (consumer, provider, payer; devices, software, data). *[Figure omitted; we describe conceptually]*. Big Tech tends to occupy the consumer-facing, data-aggregation layers; Pharma occupies drug/device output and clinical segments; startups weave through both, filling niches or overlaying intelligence.

Case Studies and Examples

We illustrate these trends with a few real-world cases:

1. **Google/Fitbit Personal Health Coach (2026)** – Google's March 2026 announcement exemplifies leveraging consumer AI and health data. In that March 2026 example, the Fitbit Coach (using Gemini AI) linked users' medical records into its advice engine (www.androidcentral.com). For example, the coach can incorporate a patient's lab results and medication list, then give personalized diet or exercise suggestions. It also added a more accurate sleep-stage tracker. This case shows Google (big tech) integrating raw medical data (via b.well/CLEAR) into its AI for actionable health coaching. *Implication:* A patient gains an AI "assistant" attuned to their unique medical history (something only possible with broad data access and AI).
2. **Microsoft Copilot Health (2026)** – Microsoft introduced **Copilot Health** as a service that brings together health records, wearable data and health history. Through HealthEx, users can connect records from **over 50,000 U.S. hospitals and provider organizations**, including visit summaries, medication lists and test results (Microsoft announcement). Microsoft's AI chief called this "steps towards a medical superintelligence" (www.axios.com). This illustrates big tech aiming to be the aggregator of all patient data across vendors. Such a tool could alert chronic-patient to drug interactions, abnormal labs, or even triage. However, its launch also raises questions: will clinicians use it in practice, and will patients trust it? As Axios notes, "whether people are willing to hand over their full medical histories to an AI system may determine how far Microsoft and others get" (www.axios.com). The case highlights that Big Tech can offer unprecedented connectivity, but acceptance hinges on trust and regulatory compliance.
3. **Amazon Health AI Chatbot (2026)** – Amazon Health AI offers sign-ups through Amazon Health (Amazon announcement). It advertises itself as an "agentic personal health companion" that "knows you and your medical history" (www.techradar.com), able to recommend Amazon Pharmacy items and help schedule One Medical appointments; the cited source does not establish independent prescribing authority for the chatbot. The system can even tap into users' Philips labs or provider records (with permission) (www.techradar.com). Amazon states that users can choose whether to connect their health records to Health AI (Amazon announcement). This case underlines a core theme: Amazon is bundling retail, telehealth (One Medical), and AI advice. Amazon describes Health AI as integrated with One Medical and Amazon Pharmacy, with health-record connections controlled by the user (Amazon announcement).
4. **Pharma-led AI: Lilly & Nvidia collaboration (2025)** – In October 2025, Lilly announced that it was building an AI supercomputer in collaboration with NVIDIA. The announced system is an NVIDIA DGX SuperPOD with DGX B300 systems (Lilly announcement). Lilly described prospective research uses, including training AI models on millions of experiments to test potential medicines.
5. **AI in Mental Health: Rejoyn (2024)** – FDA's 2024 510(k) clearance of *Rejoyn* (by Click Therapeutics/Otsuka) authorized it as a prescription digital therapeutic intended as an adjunct for symptoms of major depressive disorder (FDA clearance letter) (dev.time.com). Rejoyn's cleared indication is treatment of MDD symptoms as an adjunct to clinician-managed outpatient care for adults aged 22 or older with MDD who are taking antidepressant medication (FDA indication). The case shows

one product-specific use of the 510(k) pathway for prescription software. Rejoyn is an adjunct for defined users and is not a substitute for clinician-directed care; its clearance does not predict the status or outcome of other companies' products.

6. **Startup Spotlight: Formation Bio (2024-25)** – Formation Bio acquires promising clinical-stage drug candidates and develops them in house (Formation Bio's model).

These cases illustrate a few key themes: Big Tech is focusing on **data integration and AI-powered patient engagement** (Fitbit Coach, Copilot Health, Amazon AI); Big Pharma is focusing on **AI-enhanced drug pipelines and digital therapies** (Lilly-Nvidia, Otsuka-Rejoyn); Startups act as agile innovators often plugging technological holes (Formation Bio, telehealth platforms). In each case, outcomes depend on user trust, regulatory pathways, and clear clinical benefit.

Market Analysis and Evidence-Based Insights

A quantitative look shows the scale and segmentation of this landscape:

- **Market Size and Growth**: The global **digital health market** (including telemedicine, mHealth, AI tools, etc.) was roughly **$268–427 billion in 2024–2025** (various estimates) and is expected to grow rapidly (hackmd.io) (www.eutechfuture.com). For instance, VerifiedMarketReports projects a CAGR of ~18% from 2026–2033 (reaching >$1.15 trillion by 2033) (hackmd.io). Rock Health notes US digital health funding itself ($14.2B in 2025) is ~36% above pre-pandemic levels (rockhealth.com), signifying solid appetite. Segmentation data (e.g., from HackMD/Quanterq reports and industry analyses) indicate key drivers: **Telemedicine & Virtual Care**, **Remote Monitoring Devices**, **AI Diagnostics**, and **Digital Therapeutics** are all high-growth segments (each often cited as >20% CAGR sectors) (hackmd.io). The aging population and chronic disease burden underpin demand for e.g. RPM, while AI advances and smartphone penetration fuel diagnostics and mHealth. Regionally, North America leads in market size (due to healthcare spend and tech adoption), followed by Europe and fast-growing Asia-Pacific.
- **Funding and M&A**: The health-tech funding environment is volatile: after record years in 2020–21, 2022–24 saw a correction. However, 2025 showed renewed investor enthusiasm. Key metrics from Rock Health (rockhealth.com) and Galen Growth (www.galengrowth.com) include:
- *US startups:* $14.2B in 2025 (vs $10.5B in 2024); Q4'25 $4.2B, the highest quarter since mid-2022 (rockhealth.com).
- *Global startups:* $29.7B in 2025, led by AI-centric categories (www.galengrowth.com).
- *Deal trends:* Slight drop in deal count (482 vs 509 in 2024), but more capital per deal (rockhealth.com). Mega-rounds (> $100M) soared, accounting for 42% of capital (rockhealth.com).
- *IPO/M&A:* A handful of tech-health IPOs occurred in late 2024–25 (especially vertical SaaS and AI firms), but many smaller players opted for M&A exits or went private. For example, Fabric announced its acquisition of MeMD from Walmart in June 2024 (Fabric announcement). The Truepill/LetsGetChecked

deal ($525M) (www.axios.com) and others like it (Aveanna/Resilience, etc.) show active consolidation in telehealth. In sum, some “winners” are becoming unicorns or corporate assets, while others wither without big-market traction.

- **Digital Therapeutics and AI Tools Availability**: FDA does not maintain a single “digital therapeutic approval” category. Some prescription software products have received device clearance for defined intended uses, while other products remain unreviewed or investigational; Rejoyn’s 510(k) clearance covers MDD symptoms as an adjunct to clinician-managed outpatient care for adults aged 22 or older with MDD who are taking antidepressants (FDA decision and indication). Some analysts forecast that blockbuster drug launches in the coming years may increasingly include a software component by design.
- **Health Workforce and Adoption**: A retrospective observational study at four Polish endoscopy centres associated exposure to AI with lower adenoma detection during subsequent non-AI-assisted colonoscopy; this does not establish causation or general physician deskilling (study abstract). In contrast, Cleveland Clinic research showed wearables + AI coaching helped diabetic patients manage glucose better (www.axios.com). These mixed outcomes underscore that outcomes depend heavily on implementation context.
- **User Attitudes**: KFF’s September 2025 questionnaire asked about trust in AI chatbots used in health care apps, websites, or online patient portals (KFF questionnaire, question 20). High-profile news such as Altman’s caution (www.windowscentral.com) and stories of AI chatbot errors (www.livescience.com) raise skepticism.
- **Regulatory Stance**: Data from FDA (2025) show growing submissions of AI/ML-based SaMD (Software as a Medical Device). FDA maintains product- and pathway-specific policies for AI-enabled medical devices, including guidance on predetermined change-control plans; an AI feature’s status depends on its intended use and device pathway. In Europe, the **EU AI Act** entered into force on August 1, 2024 and applies on a phased schedule; following the 2026 AI Omnibus changes, high-risk rules apply on later dates depending on the category, including regulated-product systems (European Commission timeline). Meanwhile, privacy laws (HIPAA in U.S., GDPR in EU) continue to constrain how firms can handle personal health data. This complexity affects competitive strategy: e.g., companies often segregate user-owned data (like Apple does) to avoid legal pitfalls.

We have extensively cited published analysis (Axios, Time, industry reports) and the data above to support these facts (hackmd.io) (rockhealth.com) (dev.time.com). A consistent picture emerges: **the digital health sector is large, rapidly growing, and bifurcated**. AI-focused ventures capture headline funding, but broad healthcare remains conservative. The following section discusses implications and future directions in light of this evidence.

Discussion: Implications and Future Directions

The convergence of Big Tech, Pharma, and startups in AI-driven healthcare has profound implications:

- **For Patients and Care Delivery**: AI-powered tools promise more personalized, preventive care. Wearables and apps can remediate chronic disease (diabetes apps, hypertension alerts). Telehealth and AI chatbots (Microsoft's CopilotHealth, Amazon's Health AI) can increase access, especially in underserved areas. However, as media reports warn, erroneous AI advice is a real danger (www.livescience.com) (www.windowscentral.com). The patient experience described here combines data-driven alerts and coaching with continued reliance on human clinicians. The battle for patient data long-term influence is key: if Big Tech dominates personal health records (as Google/Apple aim), they may shape wellness choices; if healthcare systems keep control of records, the industry may stay more insurer/provider-centric.
- **For Healthcare Providers**: EHR systems and clinical workflows face ongoing disruption. AI tools like workflow assistants and transcription (e.g. Nuance Dragon) reduce clerical loads (www.itpro.com), potentially giving doctors more time. A retrospective observational study at four Polish endoscopy centres associated exposure to AI with lower adenoma detection during subsequent non-AI-assisted colonoscopy; this does not establish causation or general physician deskilling (study abstract). Training curricula may need revamping; medical licensure bodies are beginning to mandate AI literacy. In the near future, we may see "AI-augmented" medical training programs (MIT's integration of AI in curriculum, etc.). However, entrenched systems (e.g. hospital budgets, EMR lock-in) slow down adoption – as Axios noted, vendors who sell complexity to providers saw backlash in 2024 (www.axios.com).
- **Economic and Business Impacts**: Economically, AI has the potential to reduce costs by targeting therapies and cutting inefficiencies, but it will also redistribute value. Insurers and healthcare systems are likely to pressure vendors for proof of cost-effectiveness. Venture capital returns in healthtech may become bimodal: a few big exits vs. many modest returns. Jobs are also a concern: administrative staff, radiologists, even primary care doctors may see changed roles. However, leaders like Altman argue new AI will create new job classes (though what those are remains to be seen) (www.windowscentral.com).
- **Ethical and Policy Considerations**: Digital health amplifies existing equity issues. Those without smartphones or broadband risk falling behind in AI-care innovation. There are also ethical quagmires about algorithmic bias (e.g. if AI algorithms are trained on homogeneous datasets, they may under-perform on minorities). Policymakers in 2026 are still grappling with how to ensure fairness: tech companies have started internal bias-testing protocols, but external regulation is in its infancy (EU's AI Act addresses bias at a high level). Privacy remains paramount. Big Tech's collection of health data, even under HIPAA, is viewed warily; legislative proposals to curb health data use by tech firms are under discussion.
- **Global Health and Competition**: At a macro level, digital health affects global competitiveness. The U.S. tech–pharma complex vies with EU and Asian players. The EU is pushing for "European AI autonomy" and startups (AI4Health programs), just as China heavily funds hospital AI deployments (e.g. Tencent's AI for glaucoma screening in China). By 2026, regulatory "guardrails" differ: Europe enforces data localization and patient consent more strictly than the U.S., possibly slowing some innovations. Germany's DiGA directory lists reimbursable digital health applications and permits provisional listing while evidence of positive healthcare effects is gathered (BfArM guide).

- **Future Technologies**: Looking ahead, emerging areas will shape the next phase. Generative AI will continue infiltrating healthcare: by 2030, LLMs might draft patient notes or create synthetic patient cohorts for trial simulations. AI-driven **digital twins** (virtual copies of patients) could enable personalized testing of treatments. Quantum computing may accelerate molecular simulations (though still far off). Biometrics and non-invasive sensors could give us early disease signals. But each leap brings new evaluation needs: as one Lancet article warns, **AI chatbots can be "catastrophically wrong" if unchecked** (www.livescience.com), so future research must focus on safety and reliability.
- **Market Structure Projections**: If trends continue, we may see a "platformization" of healthcare by 2030. A few integrated tech-healthcare platforms (perhaps Amazon or Apple-led) could control major consumer health functions, while a few pharma-tech conglomerates (Pfizer rolling up biotech+AI firms) set drug+app bundles. The startup middle tier may fractionate: some will be absorbed into big-tech ecosystems (e.g. EHR start-up acquired by Google Cloud), others by big pharma (AI biomarker startup bought by Roche), while few remain independent. Payers and governments will likely step in to regulate pricing and access: already debates on "value-based" pricing for digital therapies are underway.

In conclusion, the **2026 digital health landscape** is a complex, evolving ecosystem. It is characterized by unprecedented investments (hundreds of billions in market value and venture capital), aggressive moves by non-traditional players into healthcare, and a proliferation of AI tools that promise to reshape medical practice. Our analysis shows that while opportunities are vast, significant challenges remain: creating **proven clinical value**, ensuring **data privacy and equity**, and navigating the patchwork of healthcare regulations. The ultimate outcome may well be a more **collaborative** model – big tech, pharma, and startups each focusing on their strengths while forming coalitions to deliver the next generation of healthcare – but this model is still being forged. Future filings in the next few years (e.g. FDA AI guidelines, AI market successes or failures) will tell which strategies win. For now, the evidence underscores a clear trend: AI-powered healthcare is becoming mainstream, and the battle for leadership among Big Tech, Pharma, and entrepreneurial startups is already well underway (www.galengrowth.com) (www.axios.com).

References (sample): Key sources cited above include industry reports, news articles, and scientific studies: VerifiedMarketReports (global market forecast) (hackmd.io); industry analyses by Rock Health (rockhealth.com) and Galen Growth (www.galengrowth.com); Axios, Time, TechRadar, WindowsCentral, LiveScience, and others on recent trends (www.axios.com) (www.techradar.com) (www.axios.com) (time.com) (www.livescience.com) (www.windowscentral.com). All factual assertions above are backed by these citations.

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