



# Digital Health in Oncology

**INSIGHTS** from **INDUSTRY LEADERS**

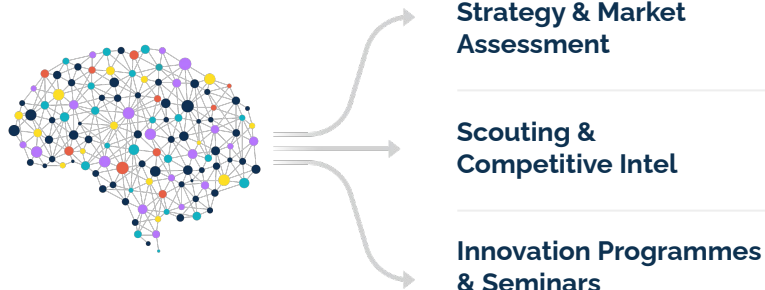
April 2022

# About HealthXL

Connecting  
leaders to solve  
health challenges  
with technology.

## Our Market Ready Tools . . .

The HealthXL advisory team offers a **wide range of market-ready tools** that contribute to our clients' success.



## . . . and Members

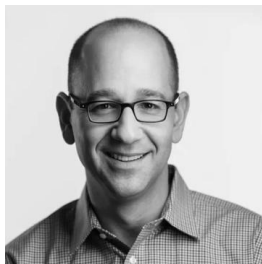


# Report Content

<b>Community overview</b>	4-6
<b>Why digital health in oncology</b>	7
<b>Evidence &amp; Outcomes</b>	8-9
<b>Incentive models</b>	10
<b>Partnerships with pharma</b>	11-13
<b>Adoption</b>	14-15
<b>Key takeaways summary</b>	16
<b>Join the community</b>	17

## COMMUNITY **ADVISORY BOARD**

This report is co-created by the **HealthXL 'Digital Health in Oncology' community** through a series of meetings in 2021 and 2022.



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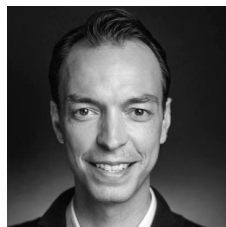
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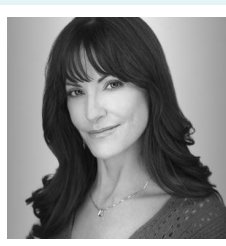
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Meet the  
rest of the  
community  
**HERE**



As part of the **oncology community**, you can **connect to a network** of your peers, **join meetings** and **gain insights** to help answer the most pressing questions in this field.

The agenda for our community is set by the **Advisory Board, which meets quarterly**. This expert group provides **strategic guidance** on what our community should focus on and ensures our meetings are on point and **valuable for every community member**.

## Main Benefits to Joining the Community



Priority access to all meetings and events



Curated community insights and news



1-2-1 networking with community members

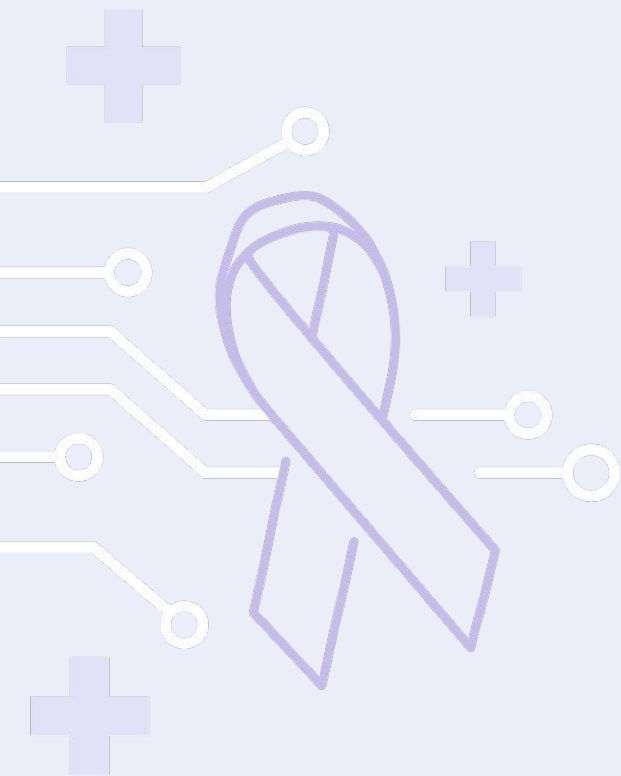


Access to our Innovation Showcase



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# Why digital health in oncology?



Digital tools are beginning to have a real impact on cancer patient outcomes. **In the HealthXL 'Digital Health in Oncology' community we come together to accelerate innovation.** In the past few months, we have had many conversations with several healthcare trailblazers focused on where digital health solutions could have the greatest impact on cancer patients' lives.

There are many pain points along the patient journey where digital health can play a role. **By harnessing the power of the community, we can accelerate how we use information and technology** in a compelling way that delivers better patient outcomes and quality of life.

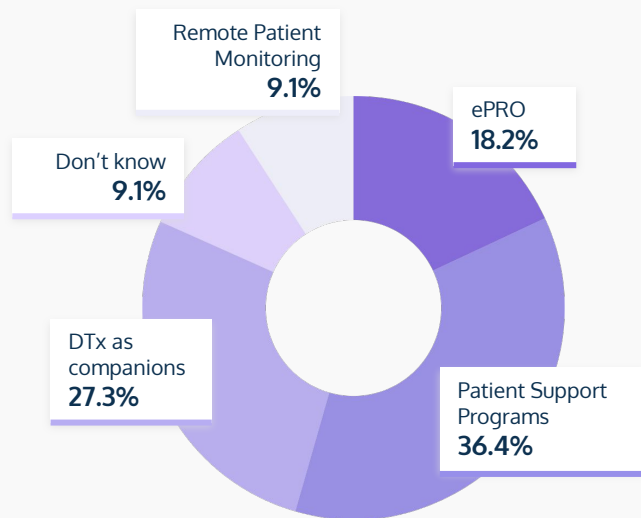
In this report you will find the **key takeaways from the most recent meetings** with the Digital Health in Oncology community, where we explored the status quo of digital health in oncology, **evidence and outcomes, incentive models, partnerships** with pharma and patient and care team **adoption**.



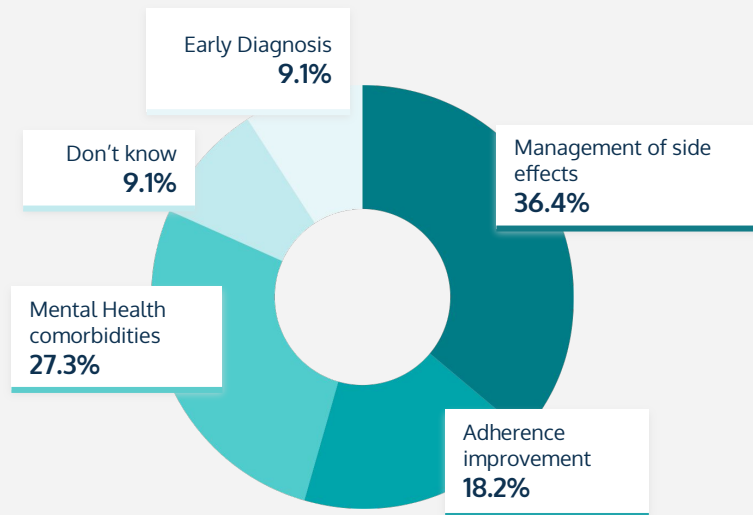
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# Evidence & Outcomes

What type of **digital health solutions** are the most **popular** in the oncology industry so far?



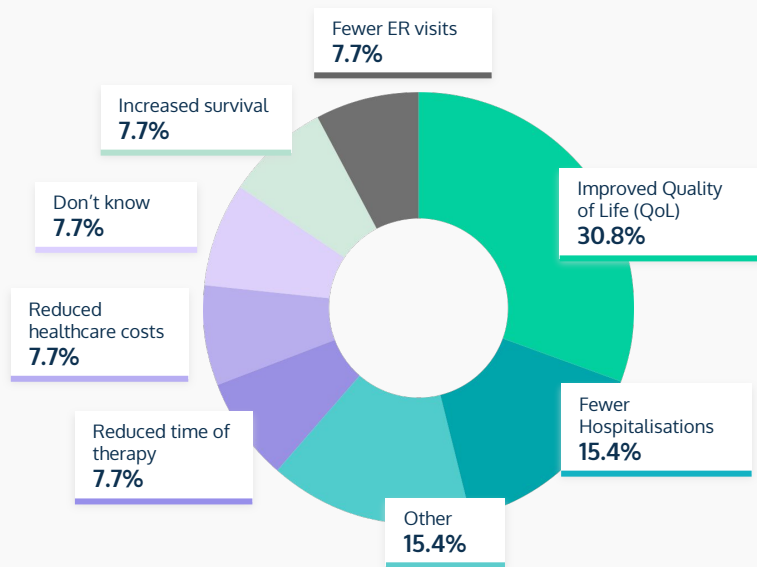
What are the **most impactful use cases** of digital health solutions in oncology?





# Evidence & Outcomes

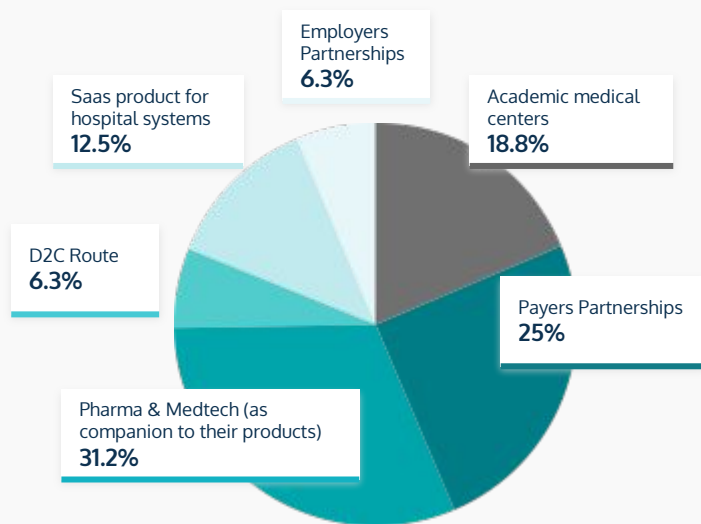
Where do the current digital health solutions in oncology have the biggest impact in terms of health outcomes and economics?



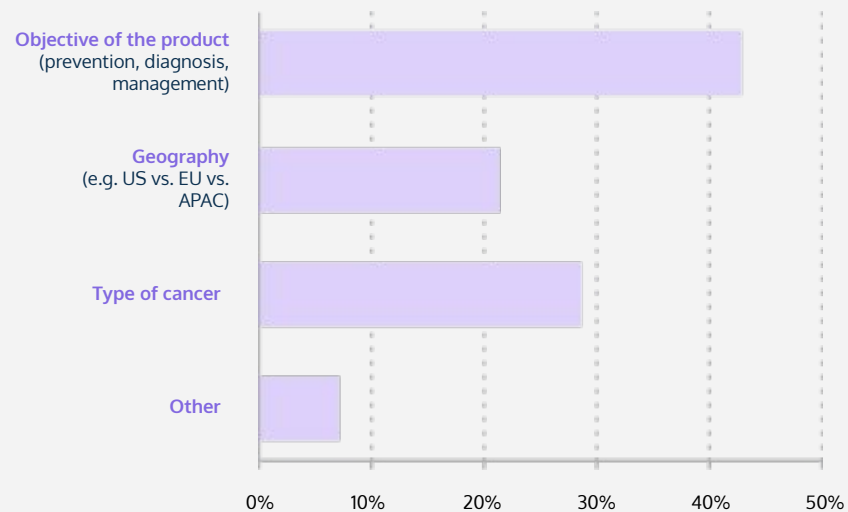
- **Patient support is key to improve Quality of Life (QoL)**; aside from the disease itself, oncology patients deal with mental health issues and side effects that compromise their QoL. There are a lot of solutions tackling these pain points. However, what seems to be missing is solutions that support the quality of care, i.e. help the care team to better manage their patients. **It is important to build services that not only support and empower patients, but also help the care team.**
- **Long term monitoring can potentially improve overall survival by preventing complications, improving preparation for chemo sessions and for early relapse detection.** Generating evidence is challenging but we have already seen promising studies showing positive outcomes.

# Incentive models

What is the best option to get paid for a digital solution in oncology?



What are the factors that determine the best route to market for digital health companies in the oncology space?

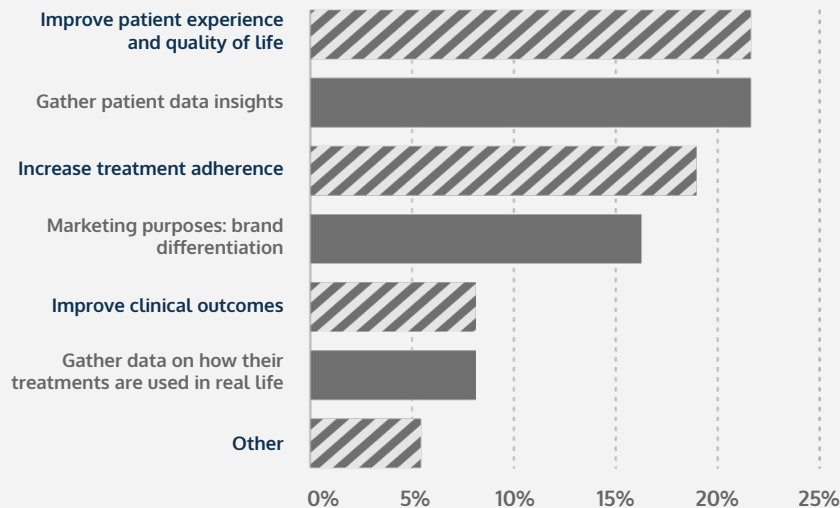


# Partnerships with pharma

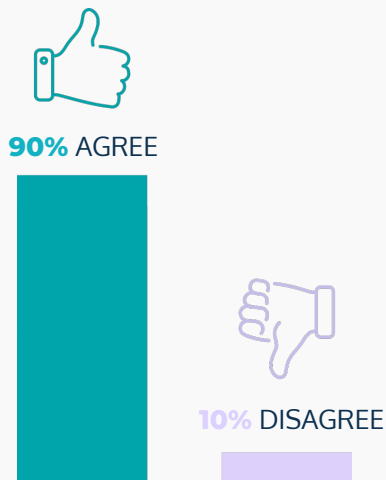
In terms of partnerships between pharma and digital health companies in the oncology space  
- what sums up your observations so far?



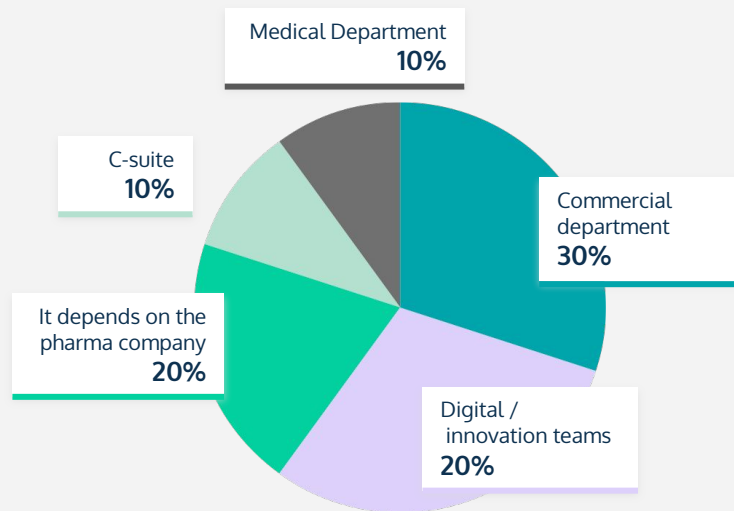
What are pharma companies looking for when partnering with digital health companies in oncology?



# Partnerships with pharma



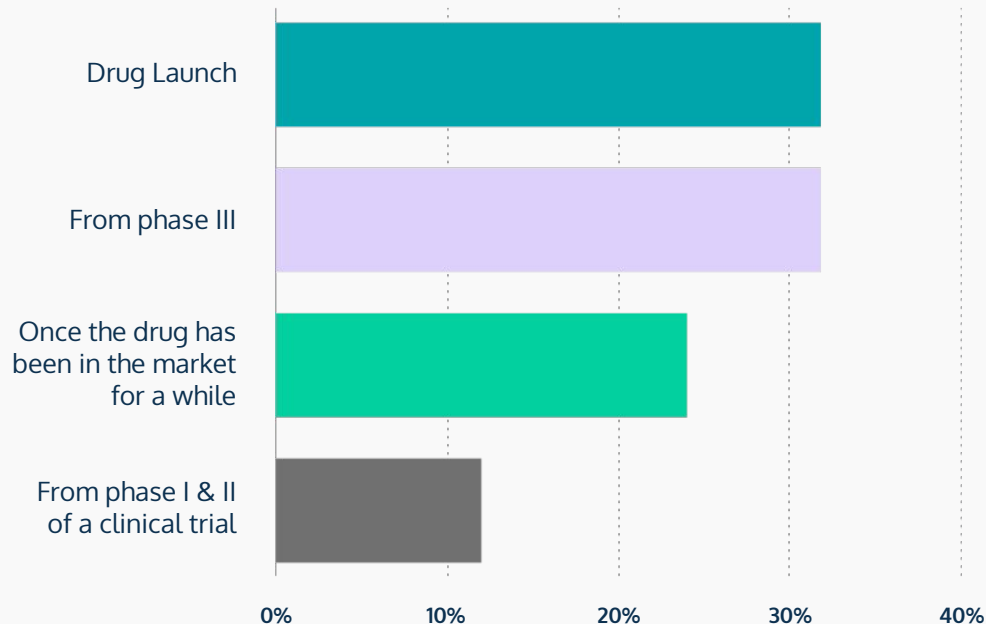
**90% agree** that there is **more room for digital health-drug combination** in oncology indications with greater levels of competition between existing therapies



**Which key stakeholder should you reach out to first to start discussing a partnership with a pharma company?**

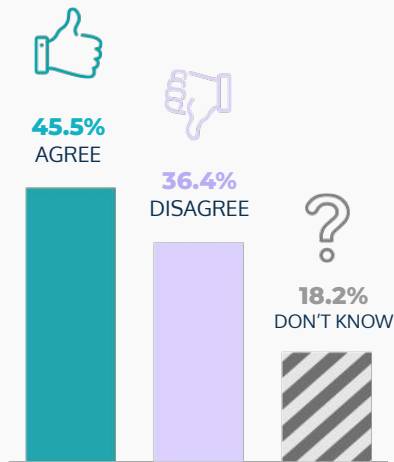
# Partnerships with pharma

**When is the right time  
in the drug lifecycle to  
incorporate a digital  
health product?**

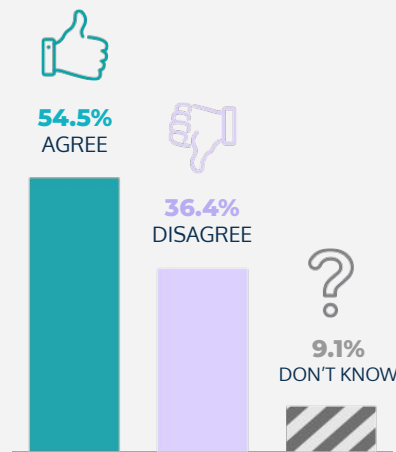


# Adoption

45.5% agree that due to oncology having a wide range of professionals involved in the patient care, implementation & adoption are harder compared to other therapeutic areas



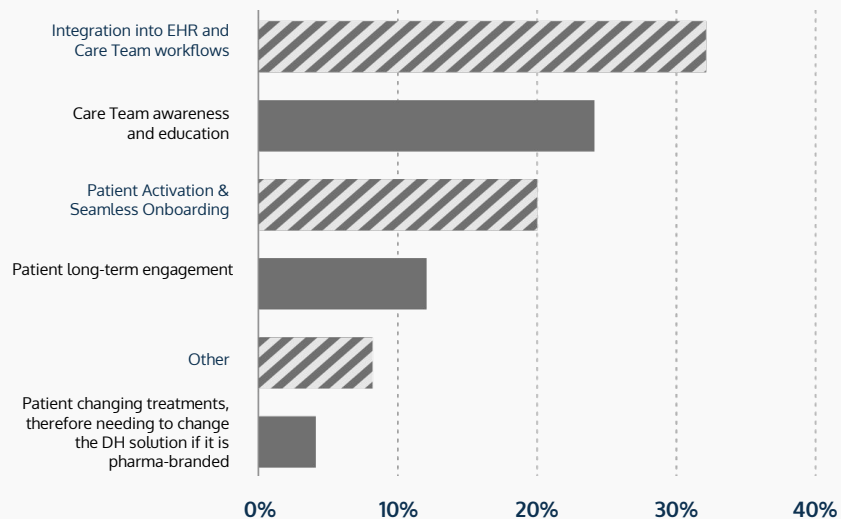
Industry perception and reception of digital health products for oncological patients has been positive so far



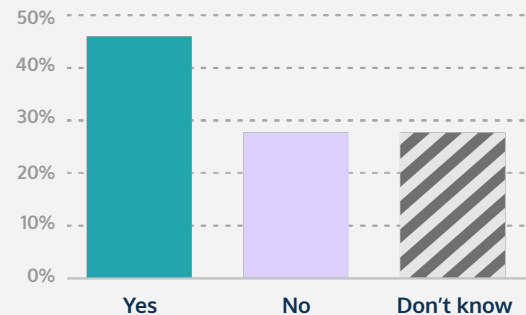
Oncology has a wide range of physicians involved in patient care such as surgical oncology, radiation oncology, medical oncology, primary care, psychologists and intensive care, among others. **Ensuring all care teams are included in a digital solution is important and more complex compared to other conditions** where, in general, one physician leads.

# Adoption

What are the main challenges in the adoption of Digital Health (DH) products in oncology?

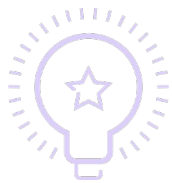


We have seen some oncology products approved as Digital Health Application (DiGA) in Germany. Has this increased its prescription and adoption so far?



While a DiGA listing is viewed as an important stamp of approval, **as of yet, it is not seen as a scalable revenue stream** given the level of reimbursement available combined with the size and diverse nature of the patient population.

# Key takeaways



The industry is still struggling to understand the evidence generation strategies and reimbursement pathways while defining the best business model for digital health in oncology

- ★ **Patient support programs are the most popular type of digital health solution in oncology.** Currently, managing side effects and mental health comorbidities seem to be the most impactful use cases for digital solutions. However, **it is important to build services that not only support and empower patients, but also help the care team.**
- ★ The objective of the digital health solution, the geography and the type of cancer are the main factors that determine the best route to market for these companies. In general, **partnerships with pharma, medtech and payers are seen as the best way to get paid** for these solutions. However, **collaborations with academic centers and hospitals also play an important role compared to other therapeutic areas.**
- ★ **It seems that there is more room for digital health-drug combination in oncology indications with greater levels of competition between existing therapies.** What pharma is looking for in partnerships is mainly improving patient experience and quality of life, gathering patient data insight, increasing treatment adherence, and brand differentiation.
- ★ Oncology has a wide range of physicians involved in patient care such as surgical oncology, radiation oncology, medical oncology, primary care, psychologists and intensive care, among others. **Ensuring all care teams are included in a digital solution is important and more complex compared to other conditions** where, in general, one physician leads.



## Do you want to be part of the conversation?

As part of the **oncology community**, you can **connect to a network** of your peers, **join meetings** and **gain insights** to help answer the most pressing questions in this field.

Contribute to the discussion today, by **joining the HealthXL Digital Health in Oncology Community!**

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