hlth. *Roundtable*

Digital Health User Communities: Driving Patient Engagement & Brand Excellence

Las Vegas, 20 October 2025

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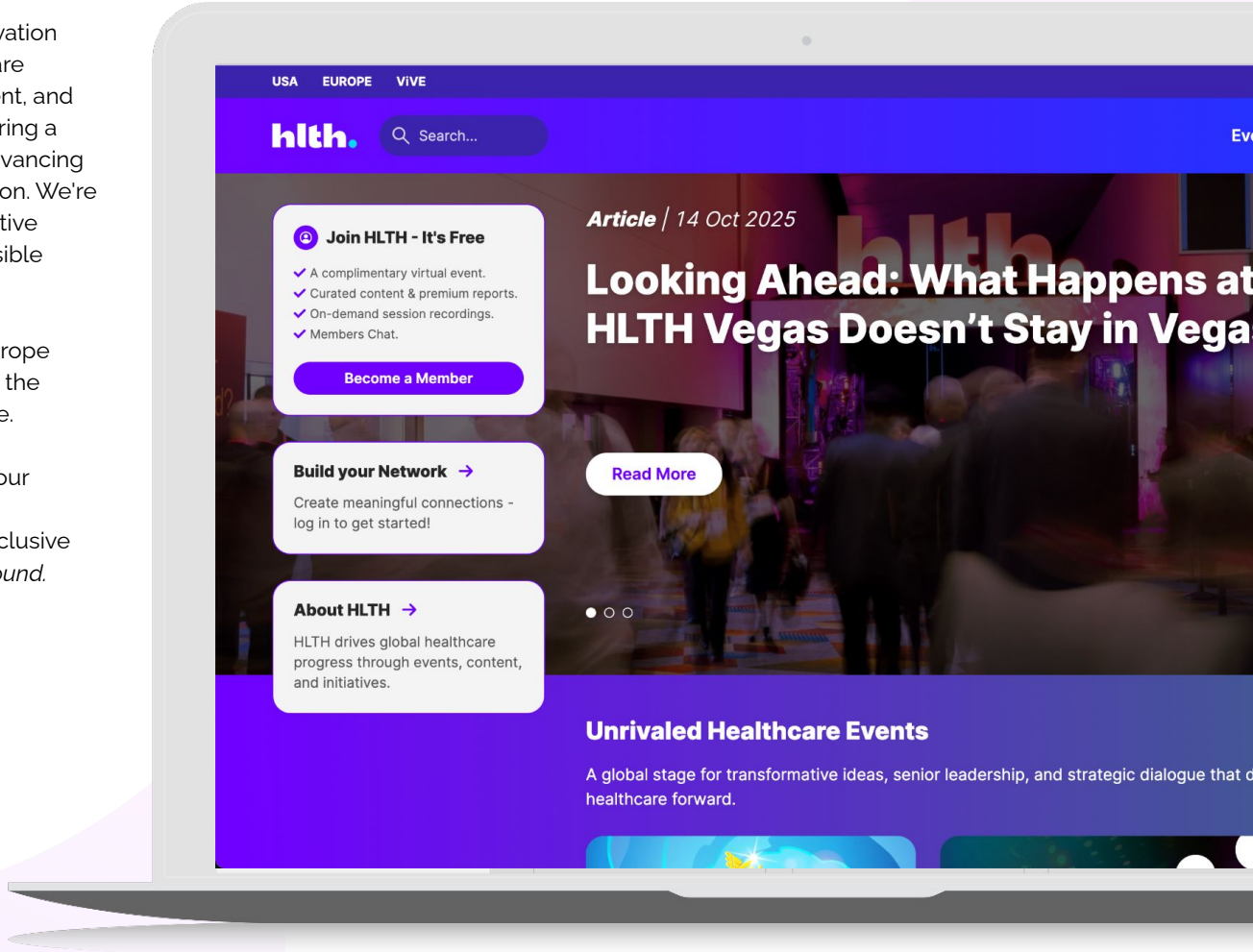

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Agenda

- Networking
- Roundtable Discussion
- Wrap Up & Next Steps

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Executive Summary

Purpose & Context

This closed-door roundtable, hosted by Aptar Digital Health at HLTH USA, brought together senior leaders from life sciences and digital health to explore where digital solutions are delivering the greatest value along the patient journey. The discussion focused on how early detection, patient engagement, and data integration are reshaping care models - and what it will take to scale these innovations sustainably.

Participation & Engagement

Participants represented a cross-section of pharma and health technology organizations. The conversation examined where digital initiatives are having the most measurable impact, from biomarker-based screening to real-world data collection, and addressed the ongoing tension between branded and unbranded digital strategies. Attendees shared examples of data-driven pilots, emerging partnerships, and evolving business models across the patient lifecycle.

Key Insights & Themes

Discussions highlighted that **diagnostics and early detection** are areas where digital health is creating tangible value - enabling earlier intervention, better patient outcomes, and stronger therapeutic pipelines. **Trust, data integration, and above-brand engagement** are critical to sustaining patient participation. Agnostic, condition-based platforms are seen as more credible, while linking patient-generated data with EHR and claims data remains an untapped opportunity constrained by privacy and fragmentation. **Collaboration and scalability** will define the next phase of progress.

Outcomes & Next Steps

Participants agreed that **future digital value will depend on ecosystem collaboration**, with pharma and tech players working together to connect patient insights to outcomes. Next steps include building scalable, data-integrated models that balance patient privacy with actionable intelligence, and exploring above-brand, condition-led platforms that serve both patient and industry needs. The discussion reflected a shared commitment to advancing **trusted, interoperable digital ecosystems** that deliver measurable value across the continuum of care.

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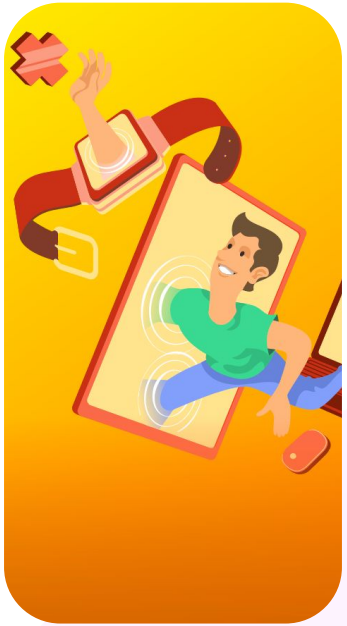
Insights

Diagnostics and Early Detection as the Frontline of Digital Value

Participants discussed how **digital health is creating value in diagnostics and screening**. Advances in digital biomarkers, imaging analytics, and blood-based tests are **redefining early detection**, especially in conditions such as Alzheimer's disease and lung cancer - where earlier diagnosis directly influences treatment outcomes and healthcare costs.

Early Detection Impact: Digital tools are enabling faster, more accessible, and often non-invasive screening methods. This is expanding patient access, accelerating clinical intervention, and broadening the funnel for therapeutic engagement.
The discussion emphasized that **digital diagnostics serve both clinical and commercial value chains**:

- For **patients**, they enable earlier awareness and intervention.
- For **clinicians**, they provide actionable data that improves decision-making.
- For **pharma**, they increase the addressable population earlier in the disease pathway.



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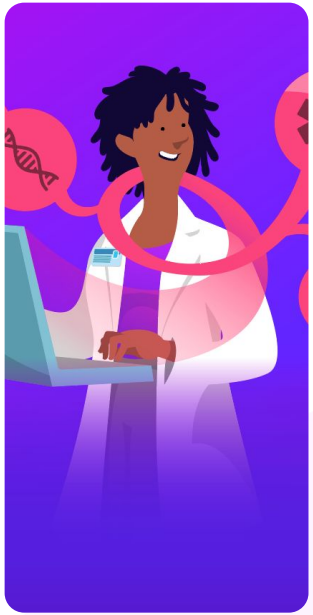
Insights

- **Patient-Led Engagement:** Participants highlighted a structural shift in how patients are engaging with their health. Increasingly, they are **initiating the diagnostic process themselves** through online symptom checkers, home testing, and retail-style screening models. This trend reflects a broader societal move toward **consumerized healthcare**, where accessibility, speed, and autonomy shape engagement. Digital diagnostics now act as a bridge between public awareness and clinical pathways - bringing patients into the healthcare system sooner and better informed.

- **ROI in Screening:** The group noted that ROI from digital diagnostics depends heavily on **disease context and maturity**. In areas with low awareness (e.g., neurodegeneration), early screening drives significant patient identification and long-term value. In more familiar disease states (e.g., dermatology or psoriasis), digital efforts may shift toward **adherence, education, or patient support** rather than awareness. Overall, the ROI lens needs to be **multi-dimensional** - combining patient reach, diagnostic yield, and eventual treatment uptake to capture the true impact of digital screening.



Diagnostics has become an **entry point for digital health integration**, linking patients, providers, and life sciences companies earlier in the care continuum. The next challenge is embedding these tools seamlessly into clinical workflows and reimbursement frameworks to sustain adoption.

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Insights

Balancing Brand, Data, and Trust in Digital Health Strategies

A dominant theme across the discussion was the **tension between branded and unbranded digital strategies**, and the central role of **data and trust** in driving long-term engagement. While branded solutions offer control and differentiation, patients often prefer **agnostic, condition-focused platforms** that align with their real-world experience.

- **Above-Brand Preference and Internal Resistance:** Participants agreed that **patients are increasingly wary of overtly branded apps**, perceiving them as promotional rather than supportive. As a result, unbranded or multi-condition solutions tend to attract higher engagement and retention.

  However, these models can be difficult to justify internally, as ROI attribution to a specific therapy area or brand becomes less direct. Many organizations still struggle to make the **business case for above-brand investment**, despite recognizing its strategic value in patient trust and ecosystem credibility. The group agreed that brand teams were traditionally concerned about in investing in activities that benefited competitors, but there is an increasing appetite to invest in solutions such as communities.

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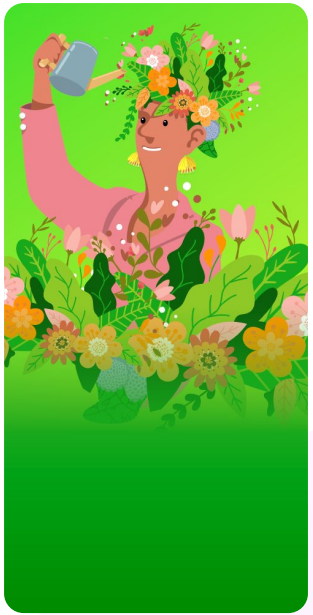
- **Data Integration and Privacy:** Participants noted the **enormous untapped potential** in connecting patient-generated data (e.g., from apps, wearables, or remote monitoring) with clinical and claims datasets. This integration could enable longitudinal visibility into patient outcomes and enable true **outcomes-based partnerships** between pharma, providers, and payers. Yet, two obstacles persist:
  1. **Data privacy and governance**: strict regulation and patient mistrust around consent.
  2. **Data fragmentation**: siloed systems that make integration technically and operationally complex.

  The consensus: the industry must move toward **trusted, interoperable frameworks** that allow for secure, consent-based data sharing without compromising patient rights.

- **Value of Real-World Data (RWD):** Participants viewed **real-world data as both a differentiator and a necessity**. RWD enables faster learning cycles, better understanding of patient behaviors, and stronger evidence for product effectiveness beyond clinical trials. Companies investing in the ability to **link RWD with patient engagement data** are better positioned to demonstrate clinical and commercial outcomes. However, this demands long-term commitment - collecting meaningful, high-quality data over years rather than quarters.



In essence, **trusted, data-rich ecosystems** - rather than isolated brand tools - are emerging as the cornerstone of sustainable digital health value. The organizations that can balance privacy, transparency, and patient value will lead the next era of digital health engagement.

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Insights

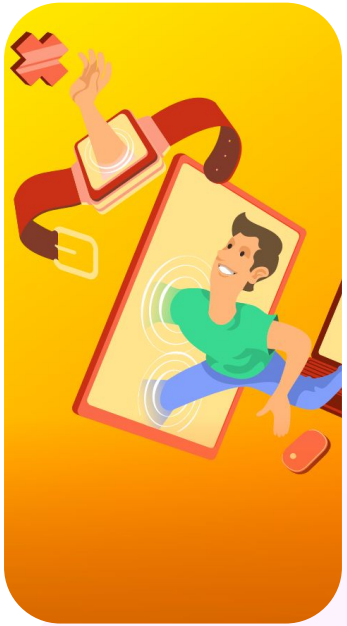
Collaboration, Scale, and the Path to Sustainable ROI

Participants emphasized that digital health value creation will depend on **scale, sustainability, and cross-sector collaboration**. The ecosystem is maturing - but true impact will only come when disparate initiatives are connected under shared incentives and infrastructure.

- **Cross-Industry Partnerships:** The discussion revealed growing openness among pharma, payers, and technology companies to collaborate - even in pre-competitive spaces.

  Shared investment makes sense in areas of high unmet need or scientific uncertainty, such as early-stage therapies, novel biomarkers, or complex chronic conditions. By combining capabilities, stakeholders can reduce duplication, accelerate innovation, and increase system-wide ROI.

  The **future of competitive advantage** will not be exclusivity but the ability to **collaborate effectively** and co-create scalable ecosystems.



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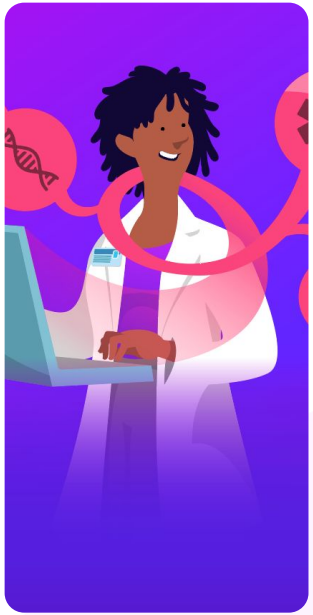
Insights

- **Scalability and System Handover:** Several participants reflected on the **challenge of moving from pilot to permanence**. Many successful digital programs begin as pharma-funded initiatives but lack sustainable models for long-term maintenance. True success requires designing initiatives that can **transition ownership to health systems, payers, or public health bodies**, supported by clear data, reimbursement, and operational models. This "handover mindset" ensures that promising solutions do not die in pilot phase but become embedded into standard care.

- **The Next Five Years:** Participants predicted that the next five years will bring:
  - **Greater collaboration between competitors**, particularly in therapeutic areas with shared challenges.
  - **Increased D2C patient engagement**, driven by consumer expectation for digital-first healthcare.
  - **Stronger integration of data, nutrition, and behavioral insights**, reflecting a shift from condition-based care to holistic wellbeing.

  The outcome will be a **leaner, more connected market**, where a few trusted platforms dominate and others integrate into them.



Ultimately, the future of digital value lies in **shared platforms, aligned incentives, and systems capable of translating patient insights into actionable, scalable impact**.

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Insights

Key Takeaways for Participants

1. **Diagnostics as a Digital Entry Point.** Early detection offers the clearest demonstration of digital value and the fastest path to measurable outcomes. Investment in accessible, validated diagnostic tools can expand patient reach and build trust at the top of the care funnel.

2. **Build Trust Through Transparency and Agnostic Platforms.** Patients prefer neutral, credible ecosystems. Companies should prioritize transparency, data stewardship, and user-centric design.

3. **Invest in Real-World Data Infrastructure.** RWD is the foundation for demonstrating both clinical and economic value. Develop capabilities to link engagement data to outcomes data over time.

4. **Design for Scale, Not Just Proof-of-Concept.** Every digital pilot should be built with a clear path to integration into payer or health system workflows.

5. **Collaborate to Compete.** Partnering across competitors and sectors is no longer optional; it's essential for sustainability, credibility, and impact.

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Recommendations

1. **Evolve ROI Frameworks.** Expand beyond short-term marketing metrics. Measure value in terms of patient outcomes, adherence, and healthcare system efficiency.

2. **Establish Data Governance Models that Build Trust.** Create clear standards for patient consent, data sharing, and transparency to make integration both ethical and scalable.

3. **Co-Create Ecosystem Platforms.** Identify shared infrastructure opportunities (e.g., federated data, patient portals) where multiple stakeholders can invest jointly.

4. **Invest in Interoperability and API-Driven Integration.** Build solutions that plug into existing provider systems rather than compete with them.

5. **Champion Industry Collaboration.** Support the creation of consortia or alliances to align on pre-competitive standards, RWD validation frameworks, and joint patient engagement metrics.

This roundtable highlighted that **digital value is no longer defined by innovation alone but by integration, trust, and collaboration**. True opportunity lies in connecting data, systems, and stakeholders to create continuous patient support throughout the healthcare journey. Organizations that align around shared goals - building open, trusted ecosystems rather than isolated solutions - will define the next chapter of digital health transformation.

Thank You To Our Anchors and Attendees

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Industry leading software platform

- Highly configurable
- ISO 13485, ISO27001 and MDSAP Certified QMS
- 15+ regulatory clearances
- Clinical evidence

Industry leading connected devices

- Dermal
- Inhalation
- Injectables
- Nasal

4+ million users across TAs and countries

- Neurology
- Oncology
- Diabetes
- Rare Diseases
- Respiratory
- Immunology
- Cardiovascular

- North America
- Europe
- APAC
- LATAM

120 countries

An industry-leading digital health software platform

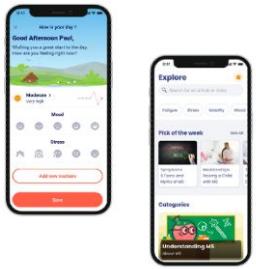
Examples of digital users communities based on Aptar's platform:

BreatheSmart

Solution for monitoring, and management of chronic respiratory conditions

Esme

Companion app that guides MS patients throughout their disease journey

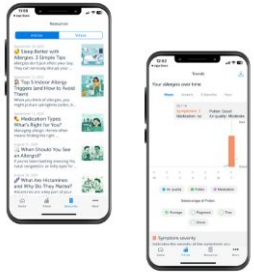


MigraineBuddy

A comprehensive and personalized migraine management solution

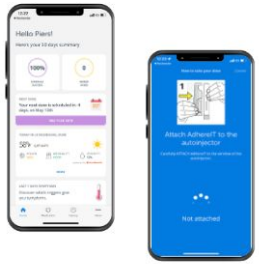
Allergy Buddy

Companion mobile app to track and manage allergy



AdhereIT

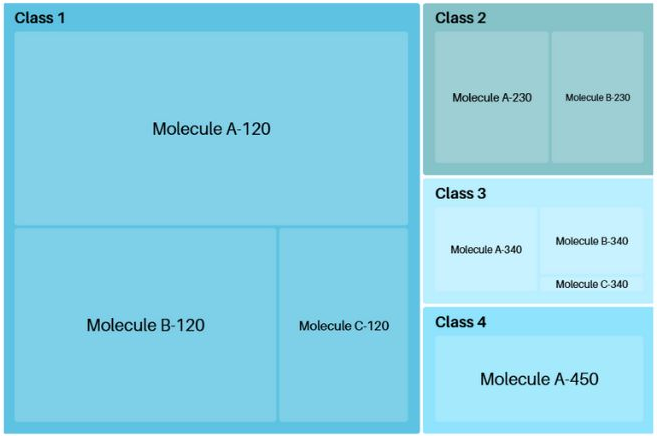
Companion solution to connected add-on for auto-injection onboarding / tracking



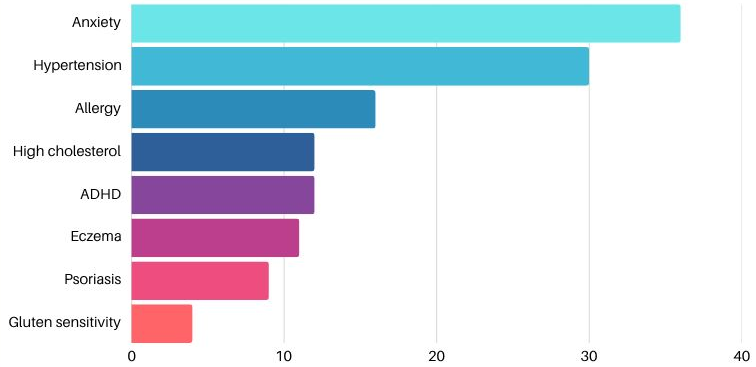
Aptar digital health

What a digital users community helps you to better understand

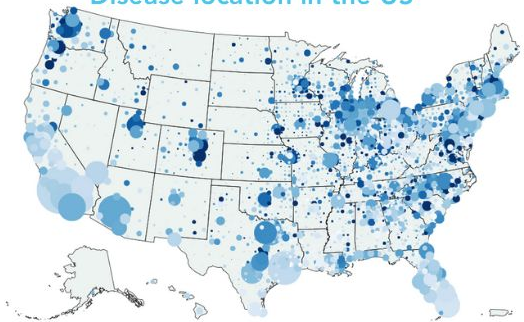
What is the distribution of medications in the community?



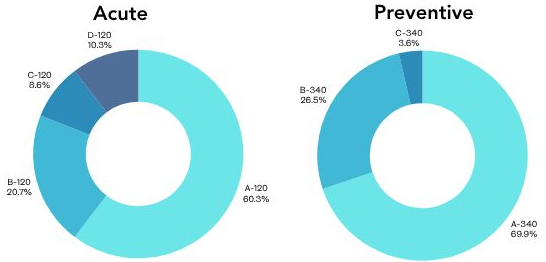
What are the comorbidities of the community?



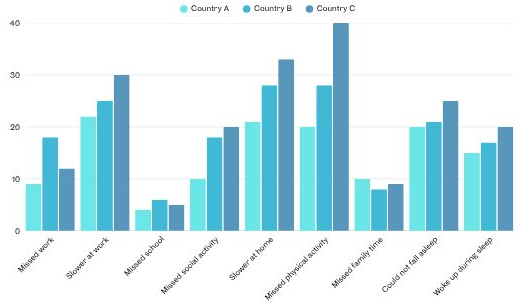
Disease location in the US



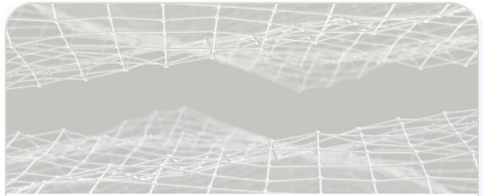
How is the community using their treatment?



Consequences of the disease on daily life



Continue the dialogue and build on these newly forged relationships



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The GLP-1 Landscape: Commercial And Clinical...

Mike Pace
Founder & CEO
PalmHealthCo

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The Art of the Possible: Redefining Healthcare with...

Aashima Gupta
Global Director, Healthcare
Google Cloud

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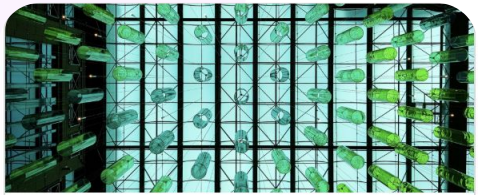

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