

Executive Summary

Global Digital Health 2022 • Thematic Report

Digital Health Innovation for Pharma Research

Industry Trends • Drivers of Change • Headwinds
Ecosystem Insights • Partnerships • Global Investment Trends



KEY INSIGHTS

- R&D productivity is down, costs are up, and drug prices are under scrutiny. The drug discovery process needs new and innovative ideas. Stratified, smaller patient populations are driving a shift away from one-size fits all mass-market blockbusters, with omics-related diagnosis and research enabling better drug/disease matching
- Large biopharma companies remain undeterred by these challenges and have set themselves challenging goals: Roche wants to deliver 2x as many medical advances to society at half the cost, whereas Pfizer wants to deliver up to 25 breakthroughs to patients by 2025
- The top 20 biopharma companies (by revenue) have entered into an average of 12 partnerships each with Digital Health ventures in Research Solutions to bring data science solutions into their drug development process
- Within Digital Health, Research Solutions is a small cluster, with just 4% of Digital Health venture volume globally however, in 2021, 11% of global venture capital funding was deployed to ventures in Research Solutions
- North America dominates the landscape by hosting 39% of the ventures, 42% of partnerships, and 59% of the venture funding deployed in 2021
- Future progress in Digital Health tools for Biopharma Research will hinge on addressing data privacy concerns and ensuring access to data globally in order to ensure diversity and inclusion of all populations for drug development



1 Unmatched global coverage

2 Cutting edge HealthTech innovation solutions

3 Proven team track record

DIGITAL HEALTH SOLUTIONS FOR PHARMA RESEARCH

cumulative 2017 - Q1 2022

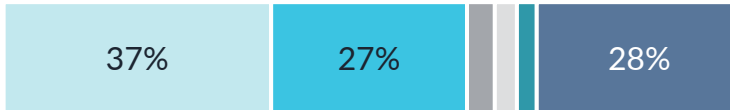
370+
VENTURES

1830+
PARTNERSHIPS

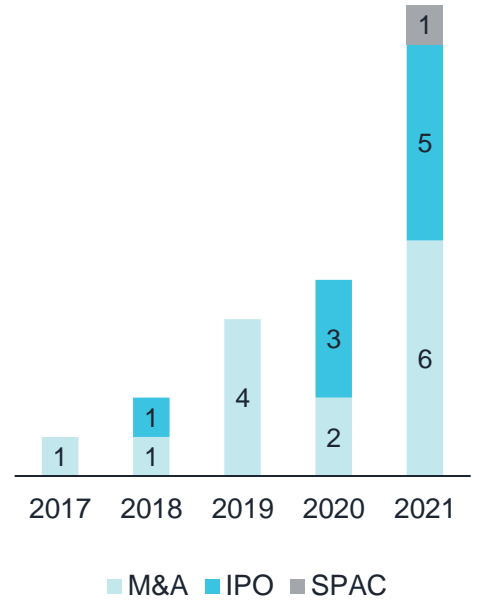
\$13.4B
INVESTED

Count of exit events for ventures
in Research Solutions

Distribution of venture partnerships by
industry vertical



- Institutions/Academia (37%)
- Tech (4%)
- Insurance (3%)
- Bio/Pharma (27%)
- Medical Devices (3%)
- Others (28%)



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