2016 CONSUMERISM and HEALTHCARE MASH-UP

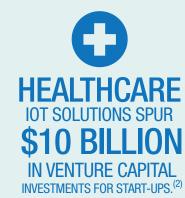
Unusual strategic partnerships and alliances begin to blur the line of where healthcare begins and ends. Never before thought of partnerships are making a splash and are transforming healthcare into a true success story of mash-ups.



LY PARTNERS BECOME DISRUPTIVE ALTHCARE INDUSTRY

"Startups and companies from other industries 'are nibbling at the edges of the traditional healthcare ecosystem' as consumers become 'willing to abandon traditional venues for more affordable and convenient alternatives'" – K. Barnes (1)





REACH \$30B IN 2016

START-UPS ATTRACTED \$5.8 FUNDING



UNDER ARMOUR + WITH IBM to create and provide meaningful data-backed health and fitness insights, powered by IBM Watson's cognitive computing technology. Under Armour's new UA Record™ combined with a Cognitive Coaching System will serve as a personal health consultant, fitness trainer and assistant. (5)

expand research into head injuries. (4)

IBM Watson ADIDAS BUYS RUNTASTIC Valued \$240 Million 📜



to collect personal health data and use of such data in clinical trials. **Johnson & Johnson** will use Watson as a personal concierge service to prepare

patients for knee surgery and to help them

Watson-based apps into its HealthKit and

ResearchKit tool systems for developers

Apple will work to integrate

deal with its after effects.

products, will use Watson to create an IOT around its medical gadgets, collecting data both for patients' personal use and, once it's anonymized, for understanding how well the devices are working. Initially, the focus is on diabetes. (7)

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Medtronic, the maker of implantable heart devices and diabetes

included: Collective Health, Oscar and Gusto. (8) Partners HealthCare announced a new partnership with Samsung Electronics to develop the next genera-

tion of personalized digital and mobile

solutions for health and wellness. (9)

and partnerships in the insurance tech

space. It made three separate health

benefits investments in 2015. These

OVER 20 MOBILE APPS FOR ENDURANCE,

HEALTH AND FITNESS

HEALTHCARE BECOMES FASHIONABLE

company and Misfit.



forged between **Martian and Guess**, transforming a "swatch" population into a smartwatch nation. The Guess



The Little Clinic operates over 185 clinics in select Kroger, Fry's, JayC, Dillons and King Soopers stores in Ohio, Kansas, Kentucky, Tennessee, Arizona, Georgia, Indiana, Virginia, Mississippi and Colorado. (13)

TRADITIONAL HEALTHCARE TAKES PLACE IN BIG BOX BRANDS

Columbia. Services have been expanded to include: diagnosis and treatment of minor illnesses, injuries and skin conditions; administration of vaccinations, injections, health screenings and physicals; and monitoring for chronic conditions. (14) **Walgreens'** estimated 400 health clinics now offer a wide range of healthcare services including prevention and wellness options like vaccines, physicals, health screenings

and testing, treatment for minor illnesses and injuries, skin conditions, monitoring and management of ongoing health conditions, medications and treatments. (15) Nestlé Health Science, a wholly-owned subsidiary of Nestlé, is advancing the role of nutritional therapy to change the course of health for consumers, patients and partners in healthcare. Nestlé Health Science is investing USD \$70

Consumers

Physical Exam Routine Care Minor Episodes Diet/Nutrition



Interested in receiving care in a least one alternative location	44%	64%	79%	66%	64%	50%
Grocery Store (such as Kroger, Publix, Safeway)	10%	17%	20%	17%	21%	11%
Discount retail store (such as Wal-Mart, Target)	11%	20%	24%	25%	25%	13%
Pharmacy (such as Walgreens, CVS, Rite Aid)	15%	30%	30%	35%	33%	19%
Walk-in clinic or urgent care center	35%	46%	61%	30%	30%	33%
Phone, voice chat, or video chat	4%	11%	13%	32%	33%	19%
Source: 2013 Oliver Wyman Consumer survey			<10%	10-24%	25-49 %	% >50 %
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LEGACY DNA