

The Retail Health/Care Convergence: *New Models, New Players*

Summary for
VM Summit Attendees
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DECODING<THE>CONSUMER

The New Science of Customer Behavior

Key Takeaways for VM Summit Stakeholders

- Patients are morphing into consumers and health care payors
- As payors, people expect retail-style experiences from health care service and product suppliers
- Respect for patients-as-payors has an ROI of trust, engagement, and patronage
- Trust is a precursor for engagement and is in short-supply in health care
- The vision industry should think, design and act like Amazon and other consumer-valued retail experiences based on patients' values & sense of value

Retail Health Is Health/Care, Everywhere



Source: Jane Sarasohn-Kahn, THINK-Health, March 2019

#CES2019: Key Categories in Consumer-Facing Health Devices Growth of the Internet of Things in Health/Care



Track
food



Track
weight



Track
activity



Track
sleep



PERS



Track
heart function



Track stress
and mood



Track
gait/stability

Growing Internet of Things Ecosystem



Track
“home”



Connected
car



The Evolving Health/Care Ecosystem – Some Examples of Big Tech & Healthcare

Tim Cook's HC vision,
EHRs, labs, wearables.
Research/Health/Care Kits



Alphabet cloud, Fitbit
Verily Life Sci, DeepMind AI,
Dr. Feinberg (ex-Geisinger)



Vertical integration
of payor/PBM



Vertical integration,
HealthHub expanding
retail health concept



Azure cloud JV,
"Store of the future"



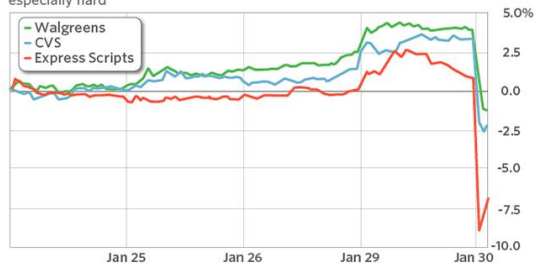
Acquiring physician,
pharmacy, hearing
businesses



the amazon effect

Health care stocks plummet after Amazon, Berkshire, JP Morgan announce new company

Pharmacy-benefit managers CVS, Walgreens and Express Scripts have been hit especially hard



Here's how Amazon, Berkshire and JP Morgan have performed vs. the DJIA over the past 6 months



Source: MarketWatch

amazon

BERKSHIRE HATHAWAY INC.

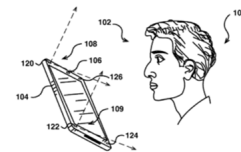
JPMORGAN CHASE & CO.

WHOLE
FOODS
MARKET



an amazon company

Amazon patent for facial recognition + heart rate analysis via cameras



Source: USPTO



amazon.com
Prime

Get started

prime

EBT



Amazon's low prices with fast, FREE delivery and much more

Prime is just \$5.99/month for qualifying customers with an EBT card. Cancel anytime.

Cleveland Clinic

TIP OF THE DAY

Alexa Flash Briefing

amazon.com basic care™



Source: Amazon, Berkshire Hathaway and JPMorgan health initiative sends industry shares plummeting, MarketWatch, January 31, 2019;
Jane Sarasohn-Kahn, THINK-Health, March 2019



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