



OLIVER WYMAN

Welcome to the

Health Innovation

Summit2016



# Where are we in the journey to Health Market 2.0?

2 0 1 2

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2 0 1 3

## Testing the Waters

- ACO: 32 Pioneer in Jan, 300+ Dec
- Big bets on value: CareMore, HCP
- Avg plan NPS: -10-+5
- Oscar founded
- ACA launch debacle
- Full genome ~\$10K

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## The Tipping Point

- 40% Pioneers gone, <30% ACOs make \$
- Health plan NPS +5
- \$3,000+ deductibles
- VC/PE Funding \$7B
- Who's who: Iora, ChenMed, Qliance
- Big guns: Apple, Google, Walmart

# Where are we in the journey to Health Market 2.0?



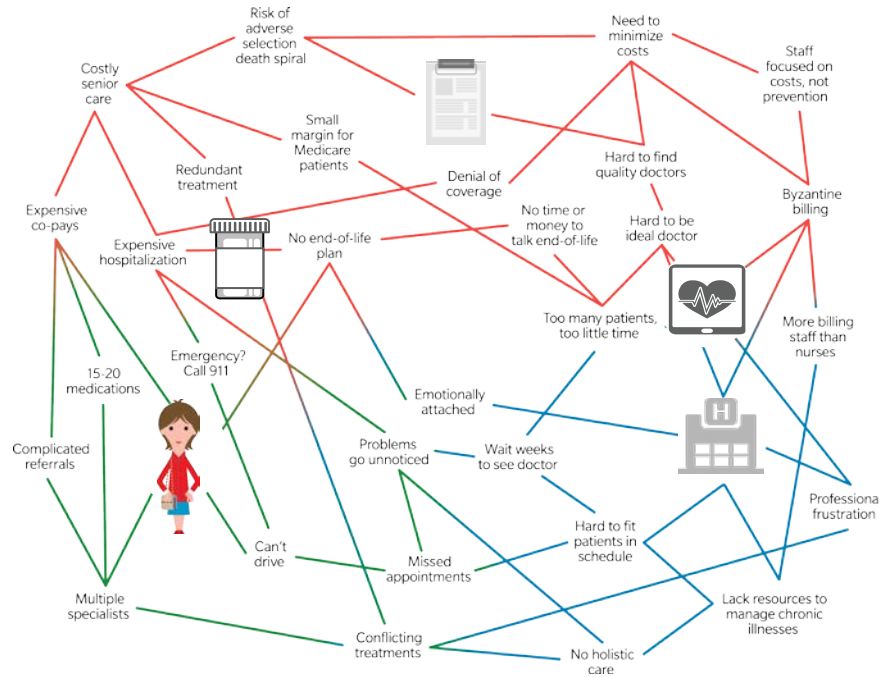
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- 9 Pioneers left, \$ still tough
- Mega mergers?
- ACA withdrawal
- Walmart revisits PCP price
- <\$1K full sequence DTC
- VC/PE \$ ?

# Why are we here?

We've all been focused on the hassle map...

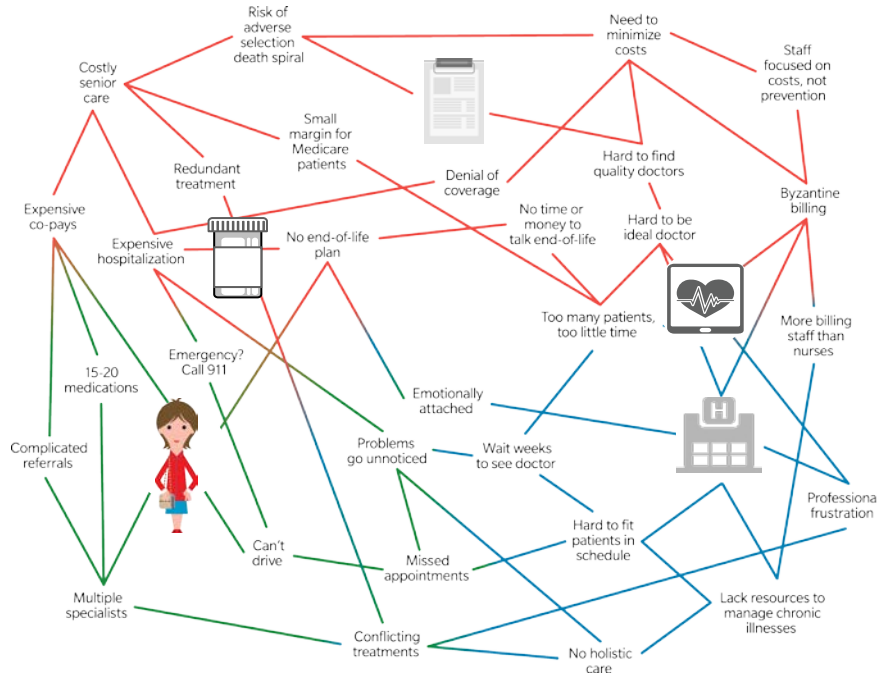


## OW observations

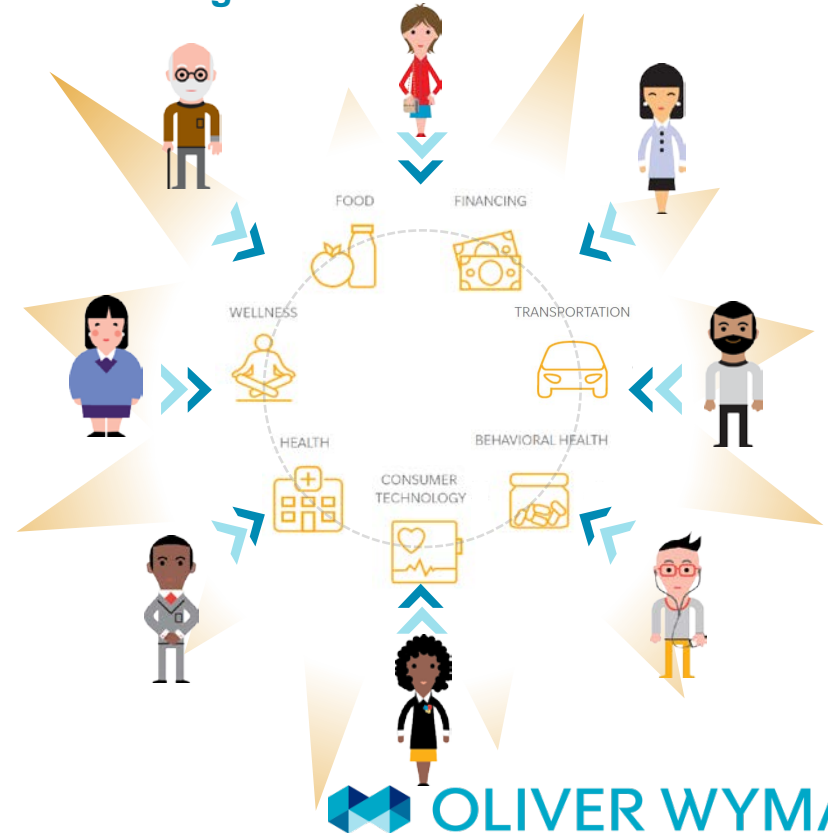
- Struggle to “put ourselves in their shoes”
- Still too “one size fits all”
- “More is more” mindset, need to curate the ecosystem
- **TOO SLOW**

# Why are we here?

We've all been focused on the hassle map...



... But to truly please the consumer requires transforming from the outside in



# The Consumer Imperative



DELIGHT  
AND DELIVER

CONSUMER MAGNETISM —  
THE KEY TO UNLOCKING VALUE

# The Consumer Imperative



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CONNECT  
THE DOTS

THINK HOLISTICALLY,  
PLAY INTENTIONALLY



# The Consumer Imperative



## DELIGHT AND DELIVER

CONSUMER MAGNETISM —  
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## MOVE FASTER, FAIL SMARTER

INCREASE YOUR CLOCK SPEED  
THROUGH STRATEGIC RISK TAKING



*“ Just because you have the ingredients doesn’t mean you can cook like Mario Batali ”*