



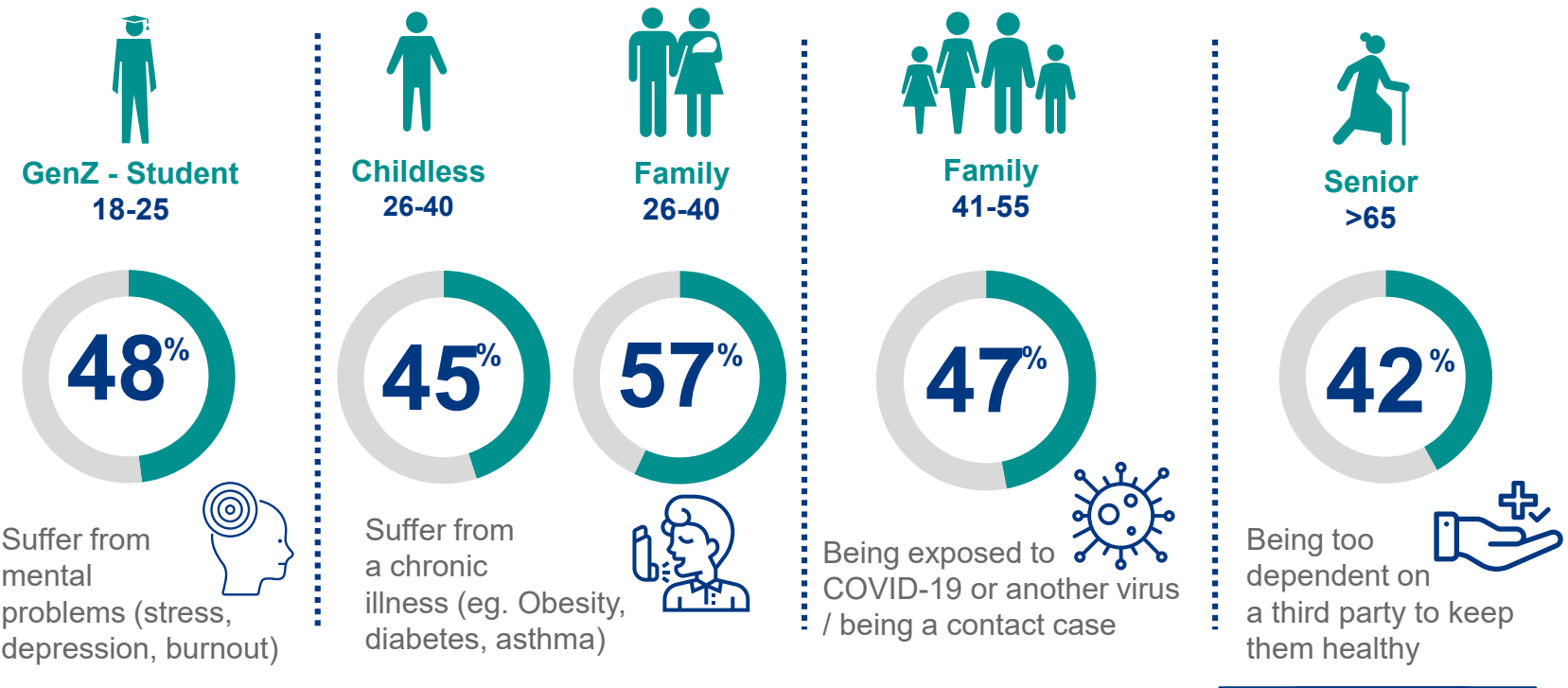
Health & Wellness behaviors energized by the pandemic

Society's understanding of health and well-being is becoming increasingly holistic, reflecting the World Health Organization's founding definition of health as "a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity".

The COVID-19 pandemic will cast a long shadow over consumers' lives and healthcare systems. Consumers will turn to tracking and home-lab tools for motivation and diagnostic insight.



Main concerns



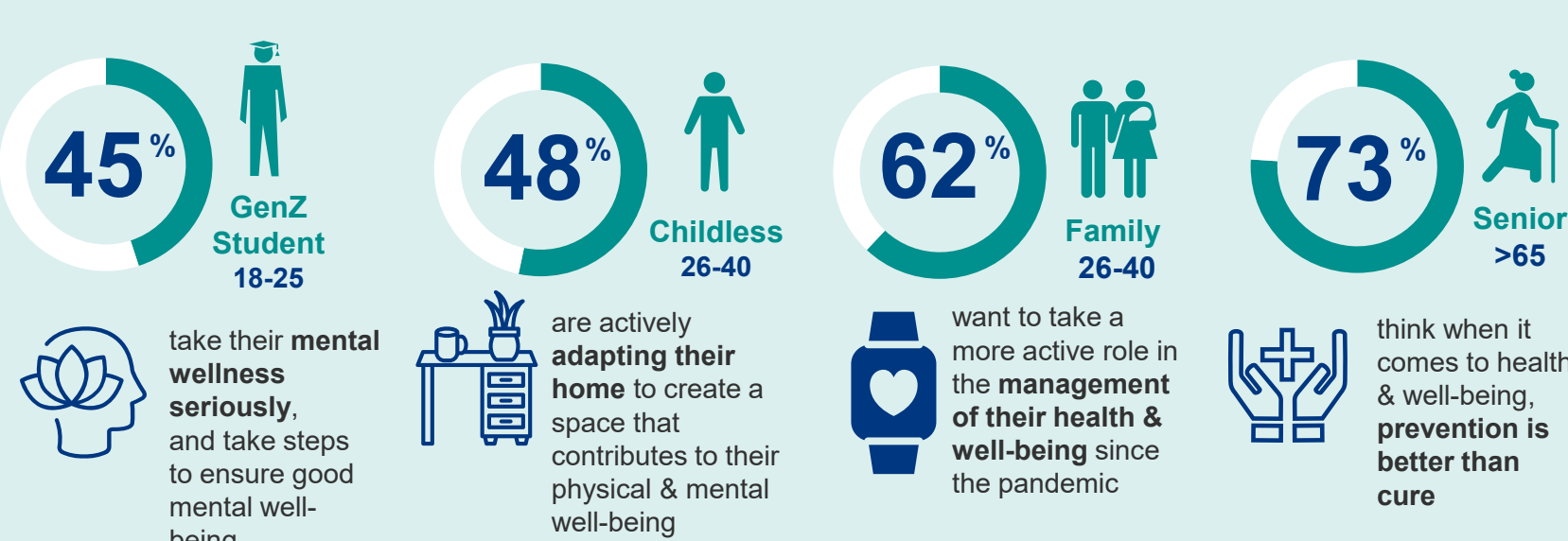
Medical shift: changing nature of illness & disease

Behavioral shift: changing nature of relationship to Health & Wellness, more proactive & preventative approach

TRENDS #1

The quest for holistic well-being

The definition of health sector evolved, integrated the digital transformation has come to include mental health, healthy habits, nutrition, fitness, and our overall well-being.

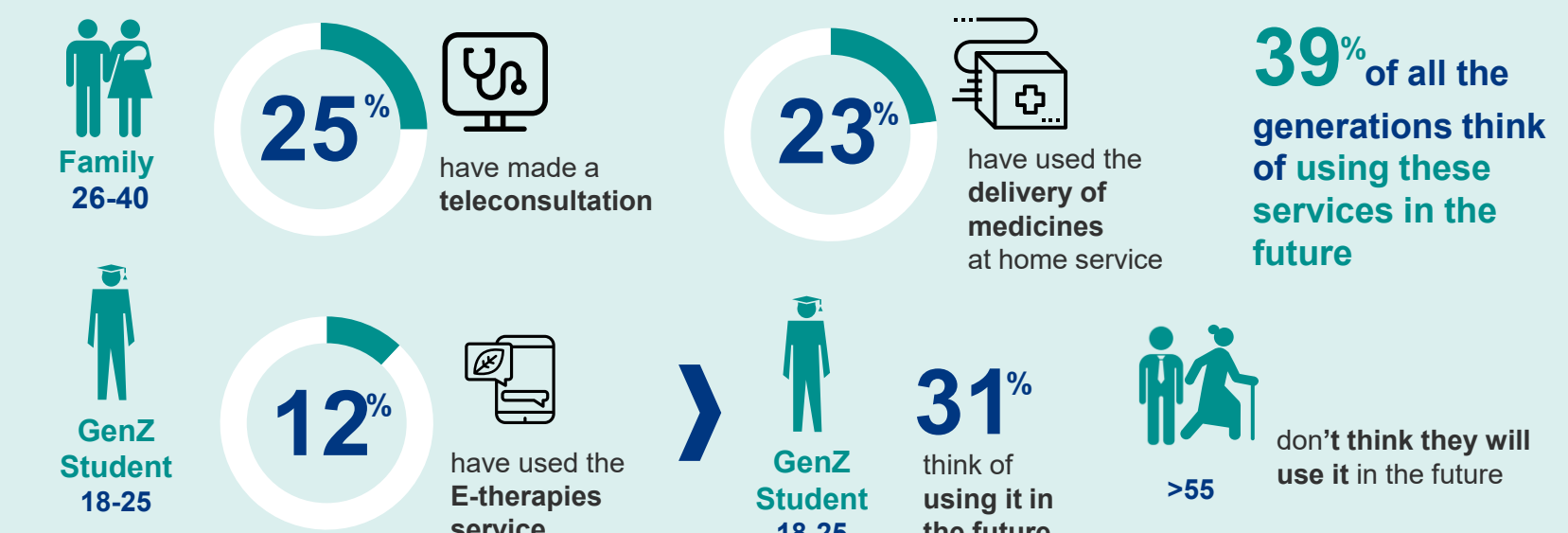


Digital healthcare is now a reality: COVID-19 has caused a massive acceleration in the use of telemedicine / digital front door to healthcare.

Digital healthcare

Family (26-40) highest satisfaction, interest & penetration among all the generations

Since the pandemic



39% of all the generations think of using these services in the future

TRENDS #2

The consumer patient

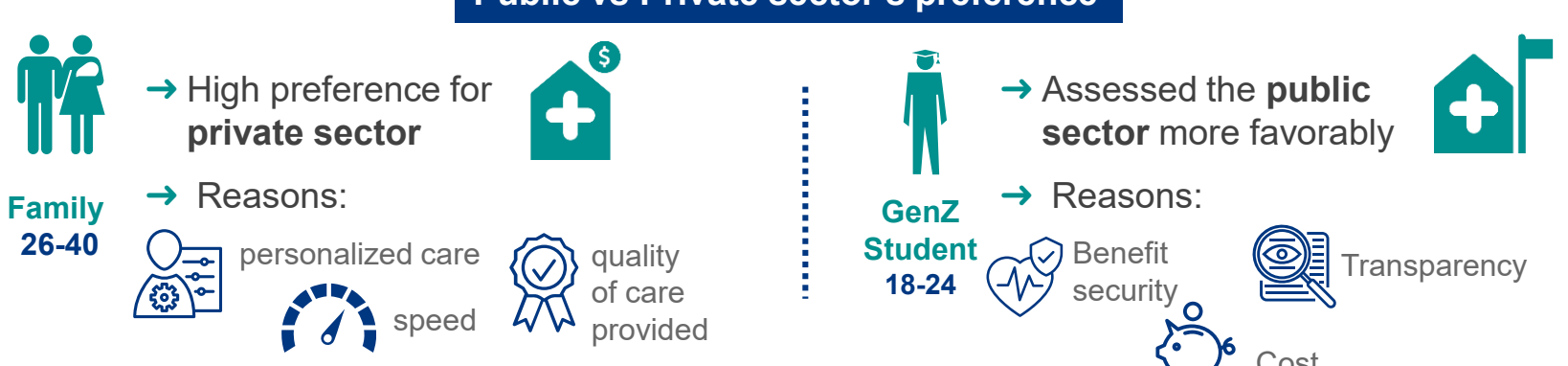
Public health systems are under increasing pressure and scrutiny by consumers. Private actors are transforming the sector.

We are witnessing the transformation of the "patient" (who waits passively to be treated) into a "consumer" (who takes active choices in determining his or her own care).

Public vs Private sector's usage



Public vs Private sector's preference



Consumers demand care that is not only accessible, reliable and affordable, but ADAPTED TO THEIR PERSONAL NEEDS, and is often delivered via private actors.

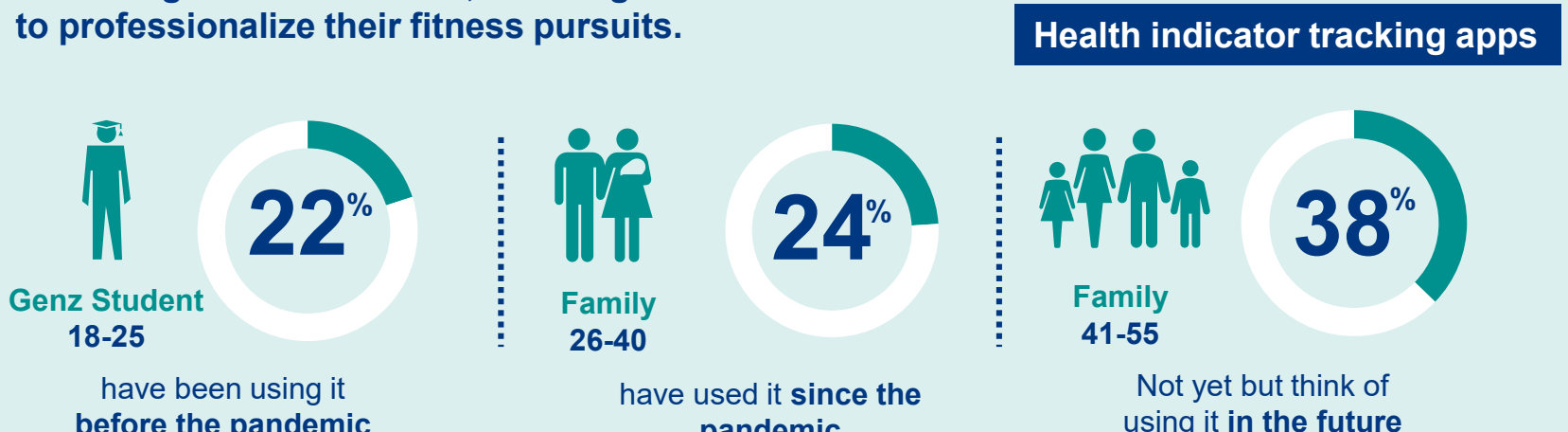
TRENDS #3

Hyper-personalized data-driven control

The usage of wearables and smart technologies enabling the monitoring of a range of health metrics has changed the health & wellness landscape since the pandemic. Health and exercise tracking tools and wearables are becoming more accessible, enabling consumers to professionalize their fitness pursuits.

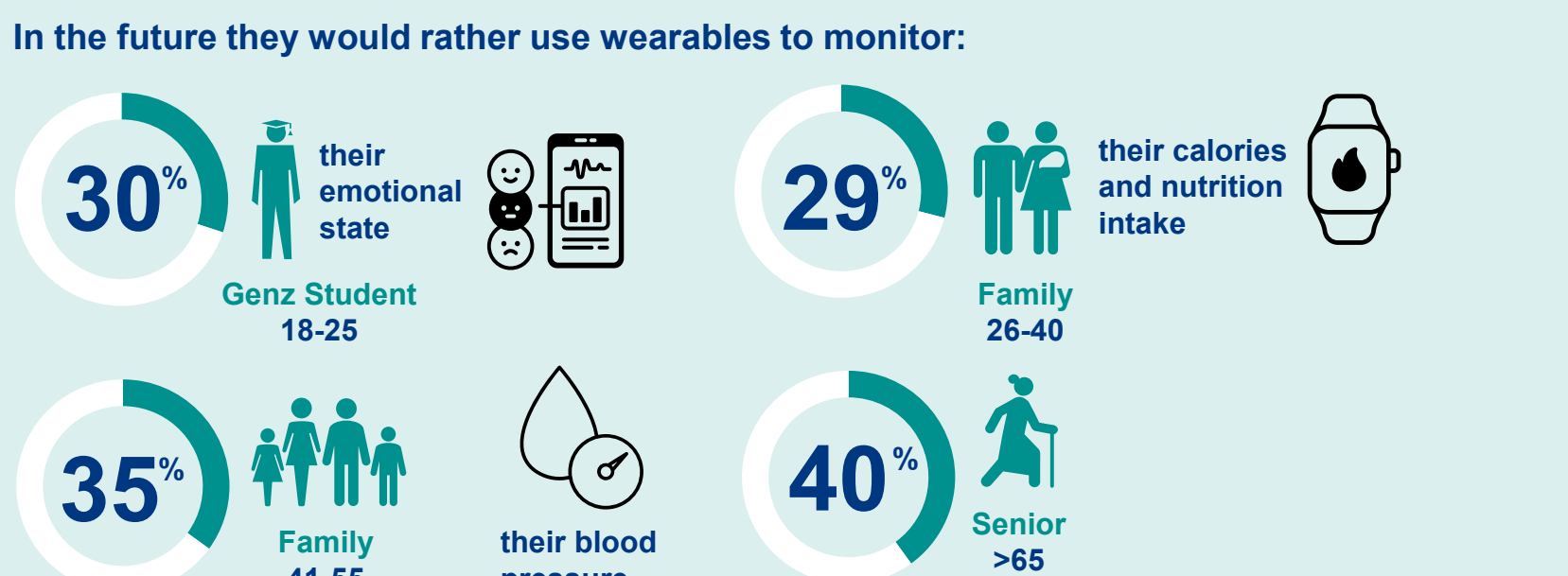


Health indicator tracking apps



Physical activities & heart rate monitoring are still the main features used today across generations but their needs have evolved and consumers are expecting more features in their connected devices to be available in the future

In the future they would rather use wearables to monitor:



Health AI Complete dashboards on health patient or family members, driven by artificial intelligence



Digital healthcare is no longer a trend, but a reality. The digital front door that has been flung open during the pandemic is only the first step towards truly tech-augmented care, with innovative solutions (such as connected cognitive devices, electroceuticals, robotics & AI) set to revolutionize the way care is managed and delivered.