

NATURALLY GOOD EXPO | MAY 2021

# How personalisation and data is *changing* the health market

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Chief Marketing Officer



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Precision microbiome science

# What is personalisation?

The tailoring of a products, services, information, experiences, to accommodate specific individuals, sometimes tied to groups or segments of individuals.

Outside the healthcare context; AI-driven algorithms serving information

## Abundance of data

“Today, with the explosion of data collection at the population level with multiple data points, it’s common to say that data has become the “oil” for our time. The sheer scale of data proliferation is breathtaking.”



Propelled by a technology explosion

# Collecting information



Monitoring heart rate, stress, calories, sleep, mindfulness, macro/micro food groups nutrients, sitting time, standing time, steps, running distance, intensity, hydration. Specific condition needs; glucose management and many more.

# Testing market boom



Genetics: genetic markers, predispositions. Stool testing; assessing the bacteria living in your gut.

*Why?*

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**Science is there now** to provide associations of illness.

We're moving into a more  
**proactive mindset.**

Using this data to define  
health signatures unique to you.

OPPORTUNITY

Not what makes *someone* sick,  
but what makes *you* sick

VALUE PROPOSITION

# \$1.5 trillion wellness market

“Our latest research shows that consumers care deeply about wellness—and that their interest is growing. In a survey of roughly 7,500 consumers in 6 countries, **79 percent of the respondents said they believe that wellness is important**, and 42% consider it a top priority.”

April 8, 2021 Feeling good: The future of the \$1.5 trillion wellness market

Creating **purpose-driven** vision, not data for data sake

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**Ownership;** taking this information and make it useful

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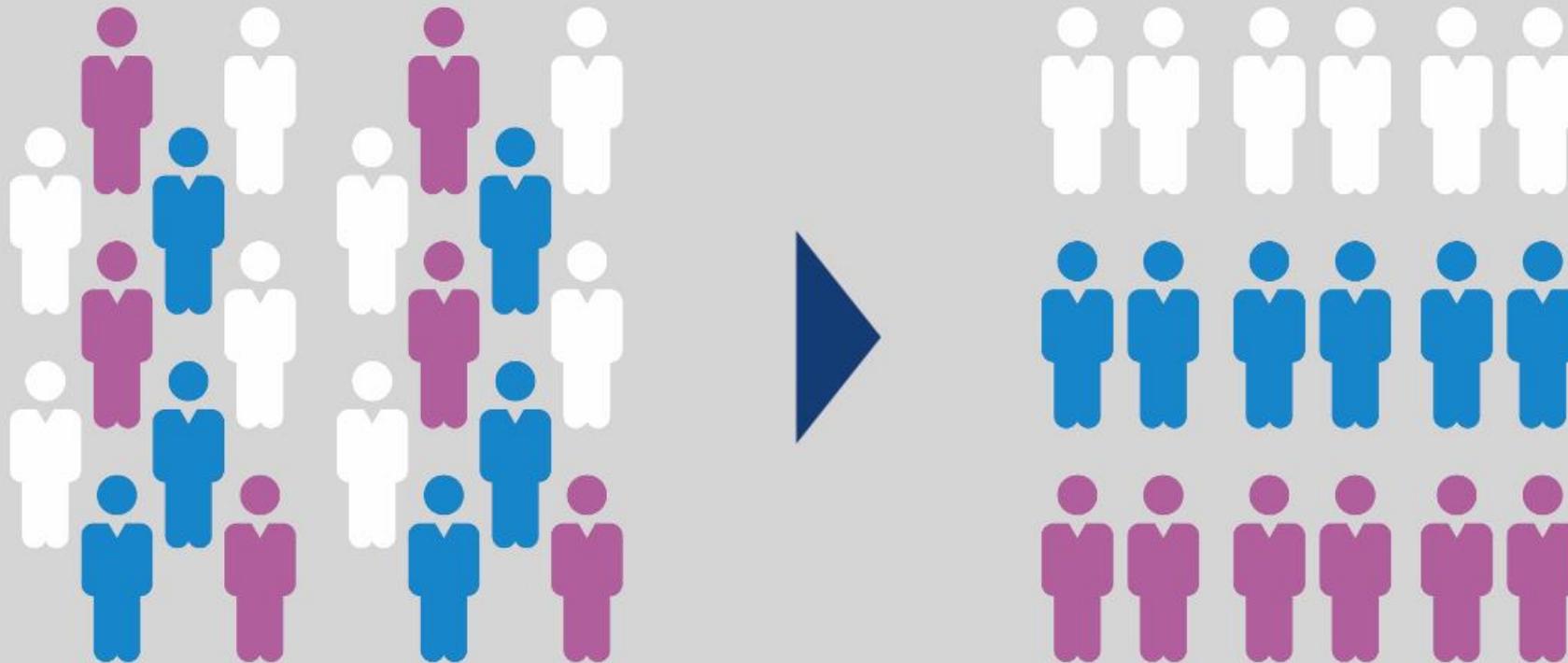
**Evidence-based**, actionable interventions.

# Primary care & diagnostics

**Precision medicine;** is a medical model that separates people into different groups—with medical decisions, practices, interventions and/or products being tailored to the individual patient based on their predicted response or risk of disease.

As defined by wikipedia

*“The right drug, for the right patient, at the right time.”*



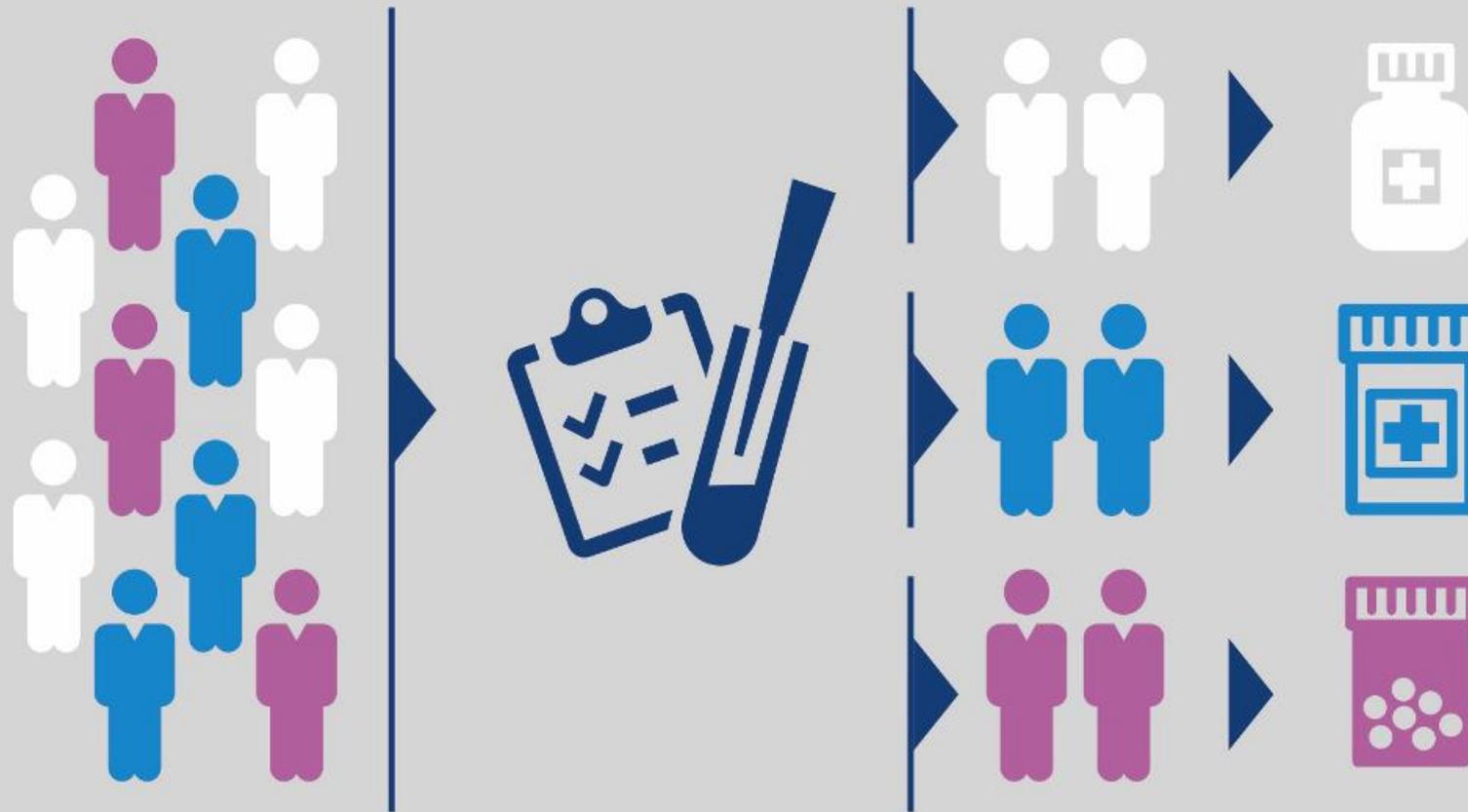
Traditional “one size fits all” approach,  
where all patients with the same  
diagnosis receive the same treatment.

Precision medicine approach,  
where treatment strategy is based on  
a patient’s unique genetic profile.

“In the future, we will be using data for a variety of patient characteristics to determine the best combination of treatments to improve a person’s overall healthcare.”

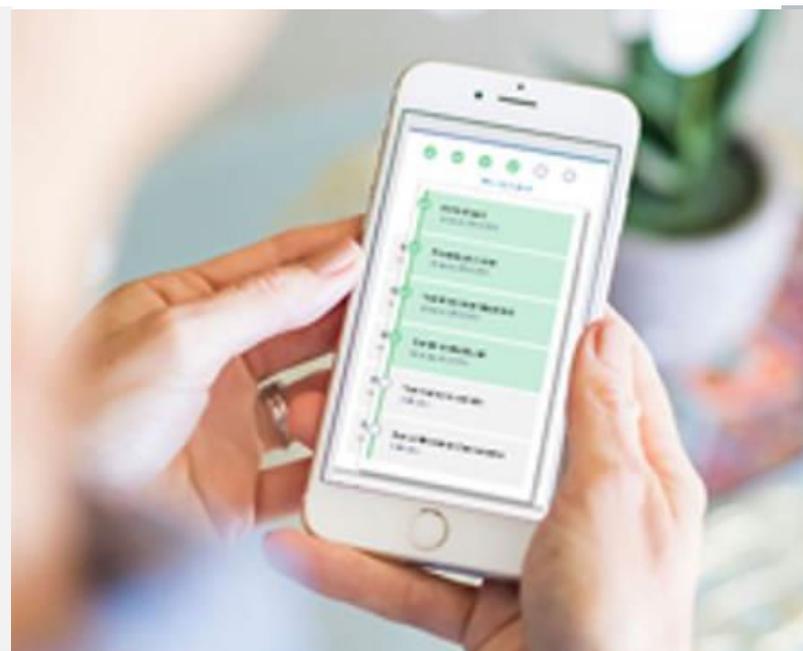
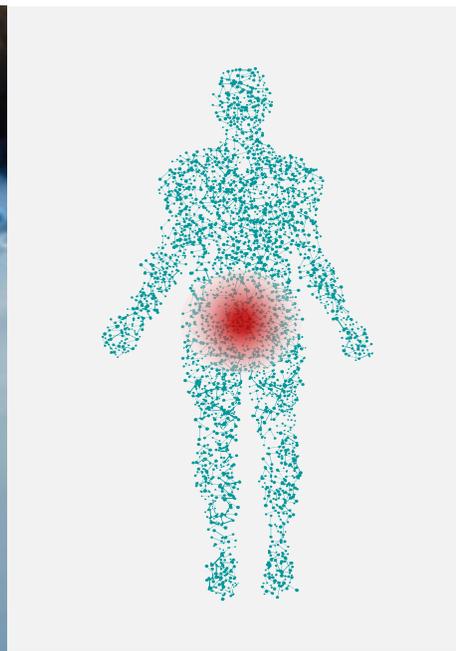
Michele Pedrocchi, Head of Global Strategy  
and Business Development for Roche Diagnostics

# Consumer focus



With an accurate measurement of specific markers, assess your biology to curate more effective products in support of health.

# Personalised health solution



Product choice is a confusing experience, aiming to personalise the solution using a science-based process.

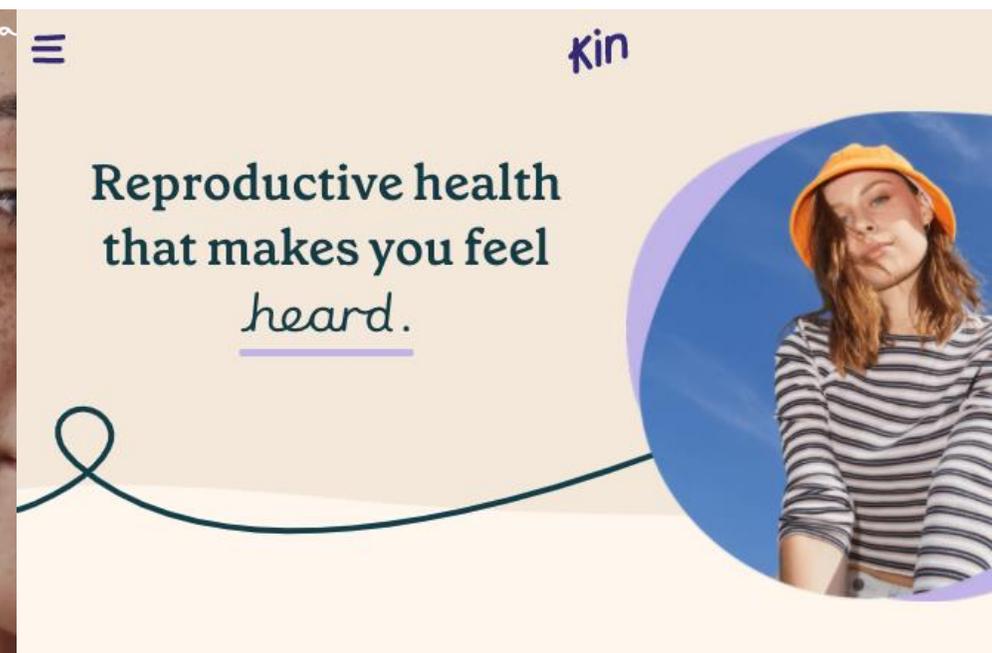
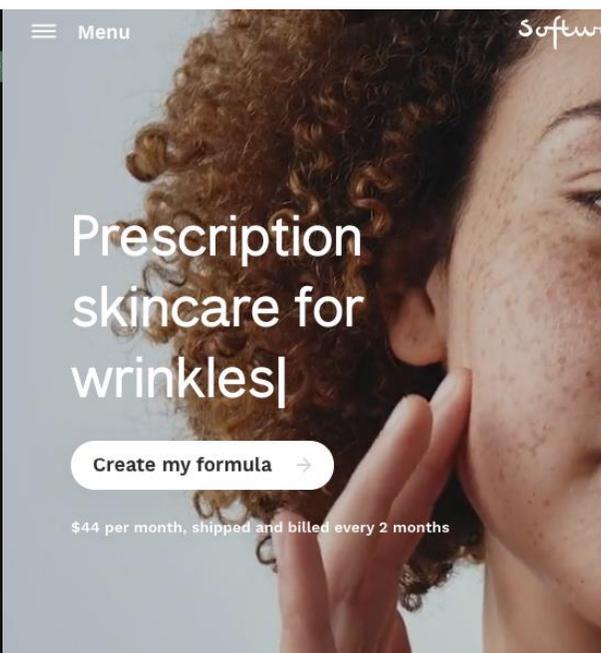
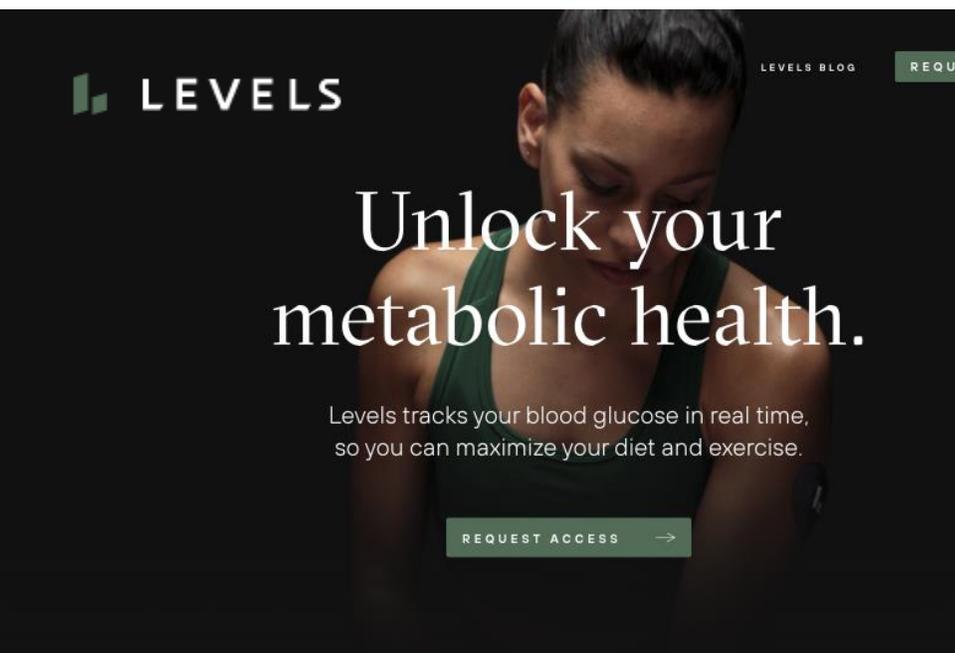
# Consumer interest

“Wellness enthusiasts are high-income consumers who actively follow brands on social media, track new-product launches, and are excited about innovations.”

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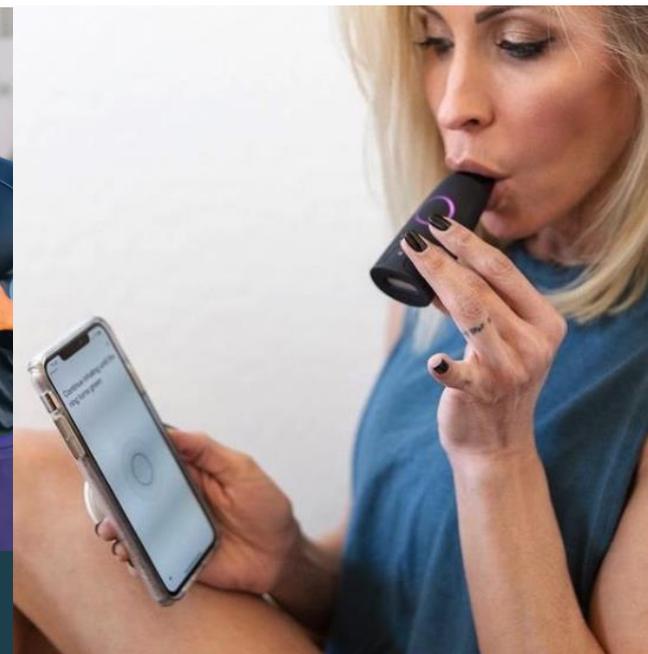
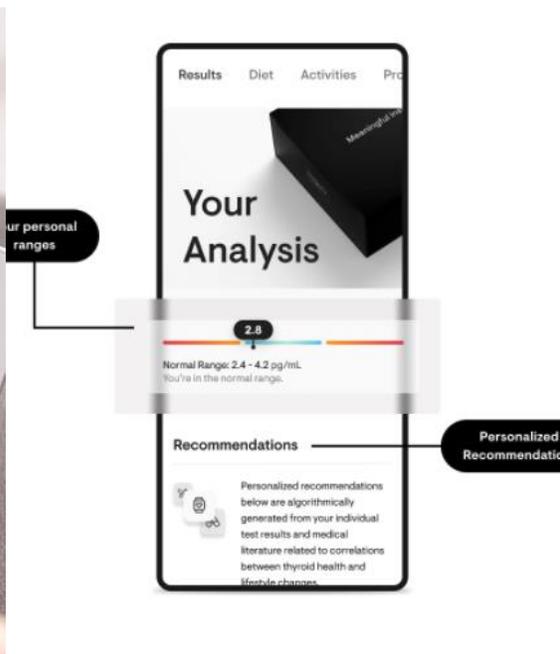
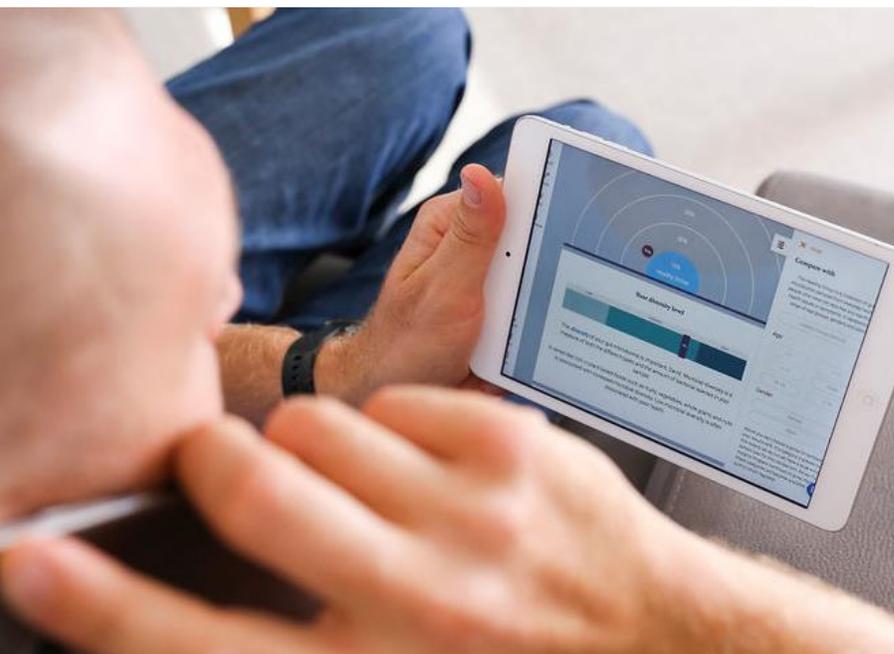
# Disruptive trends

# Condition-focused brands



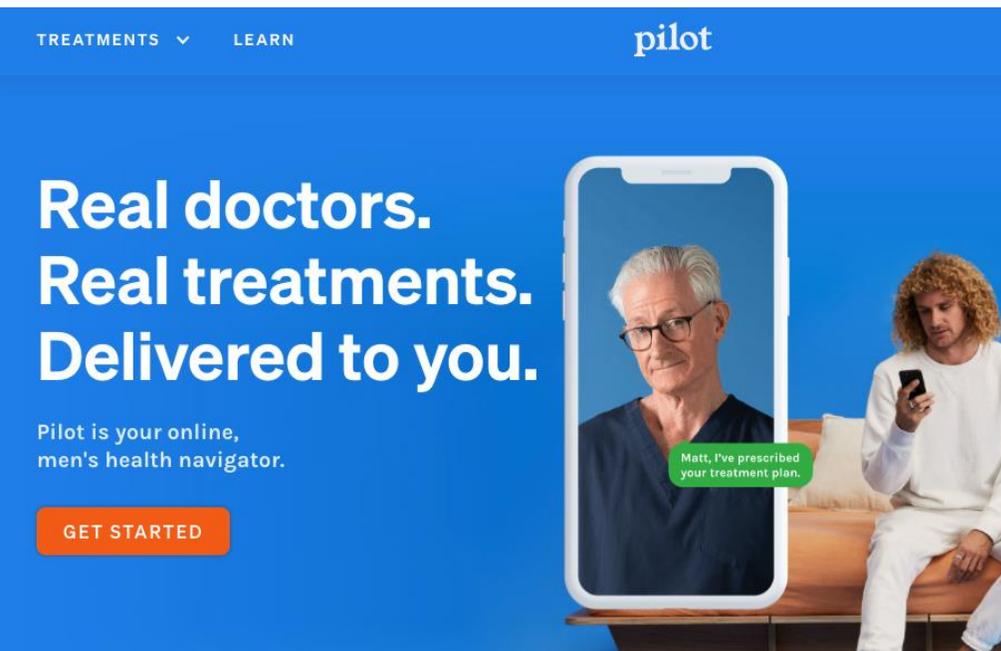
Speaking directly to the customer, solving a specific problem

# Personalised, scientific wellness



Revealing how your daily behaviors impact your body, informing what you need

# Subscriptions, delivered



Vitamins, supplements, prescription medicine delivered & compound pharmacy

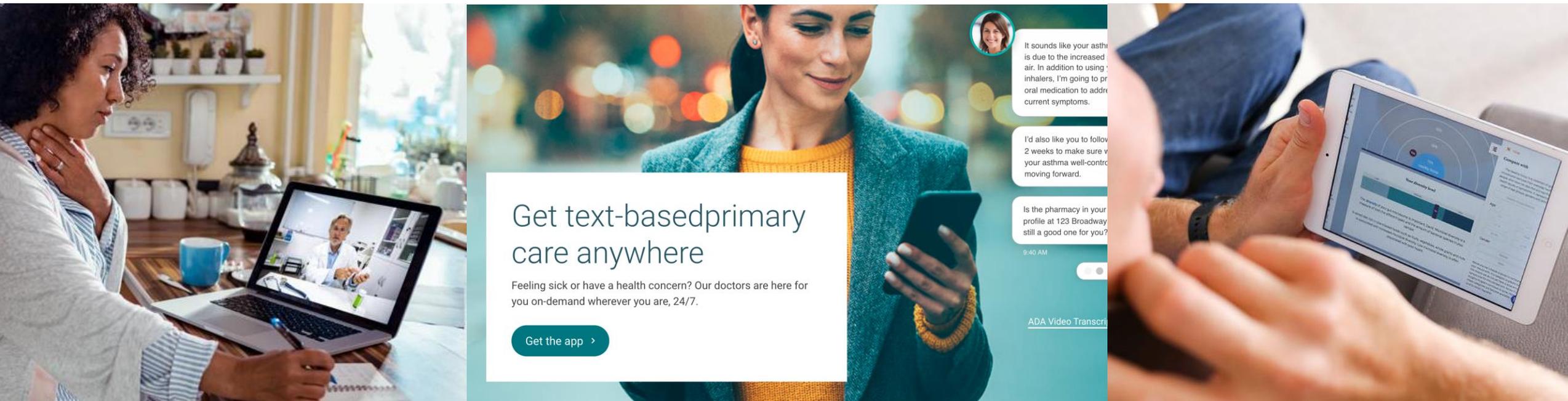
# Front of mind

“Better nutrition has always been a part of wellness, but now consumers want food not only to taste good but also to help them accomplish their wellness goals.

More than a third of consumers around the world report that they “probably” or “definitely” plan to increase spending on nutrition apps, diet programs, juice cleanses, and subscription food services over the next year.”

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# Telehealth, remote-health rising



Telehealth, remote-health rising, less in-person visits

“Telehealth startups have already raised \$2.6B across 194 deals” CBI Insights 2021 Report

Personalisation is important to the future of health

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Understanding our unique health signature is key

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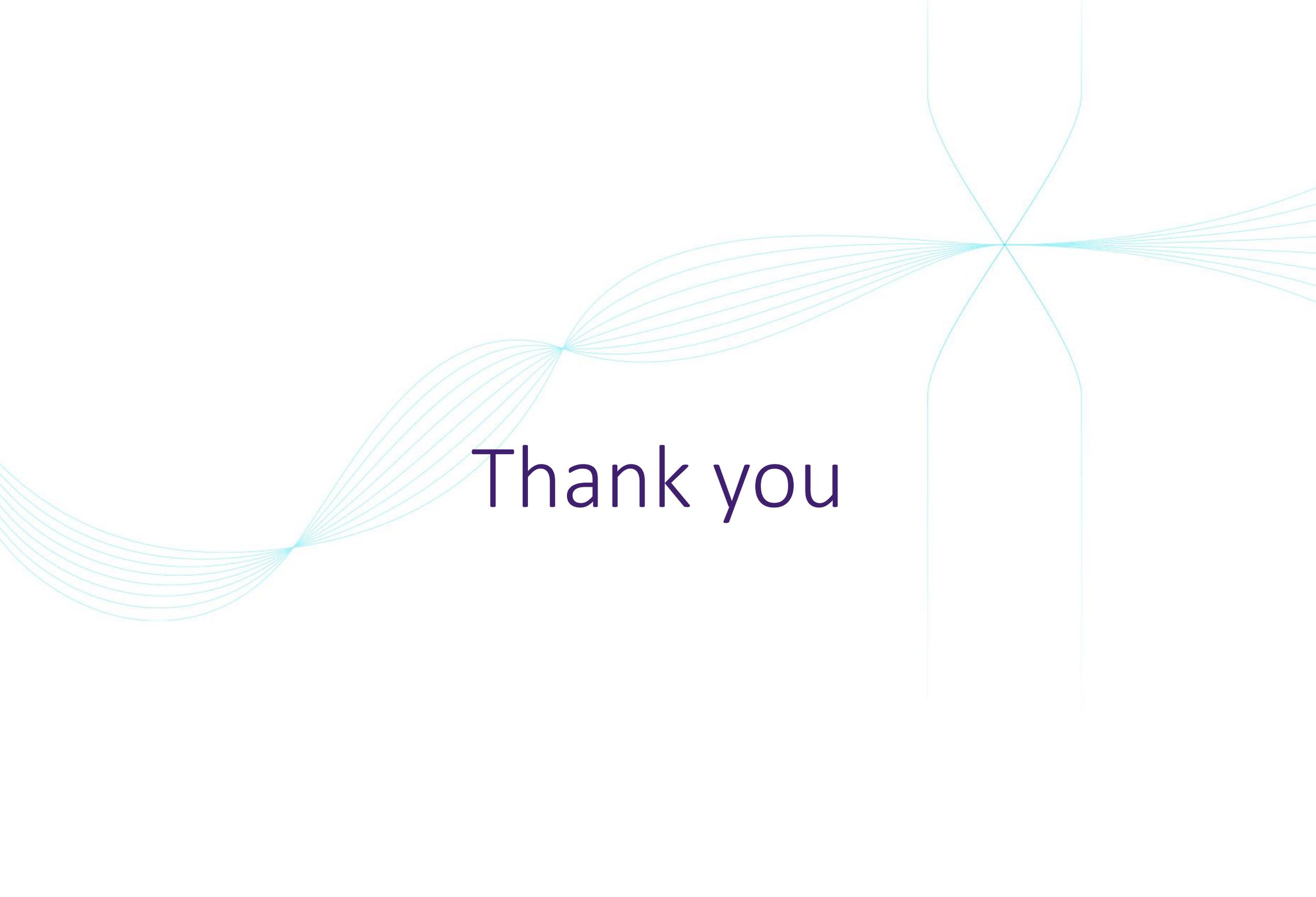
Understanding our unique health signature is key

Strong consumer demand for more catered experiences

“We are at a pivotal moment  
in healthcare history.

An unprecedented convergence  
of medical knowledge, technology  
and data science is revolutionising  
patient care.”

Michele Pedrocchi, Head of Global Strategy  
and Business Development for Roche Diagnostics



Thank you