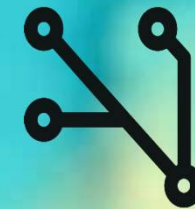


Digital Fusion

How smart collaborations
will fuel the healthcare
revolution.

TLA HealthTech Innovator Conference 11 June 2019



TECH
LONDON
ADVOCATES

HEALTHTECH

Simmons & Simmons

Digital Fusion

How smart collaborations will drive the healthcare revolution.

Digital technologies are poised to transform every aspect of healthcare

71%

Digital health will transform patient care

61%

Digital health will drive industry consolidation

62%

Digital health offers huge cost savings for our organisation

Base: All respondents n = 441/Payers 32

DH01. To what extent do you agree with the following statements about digital health?

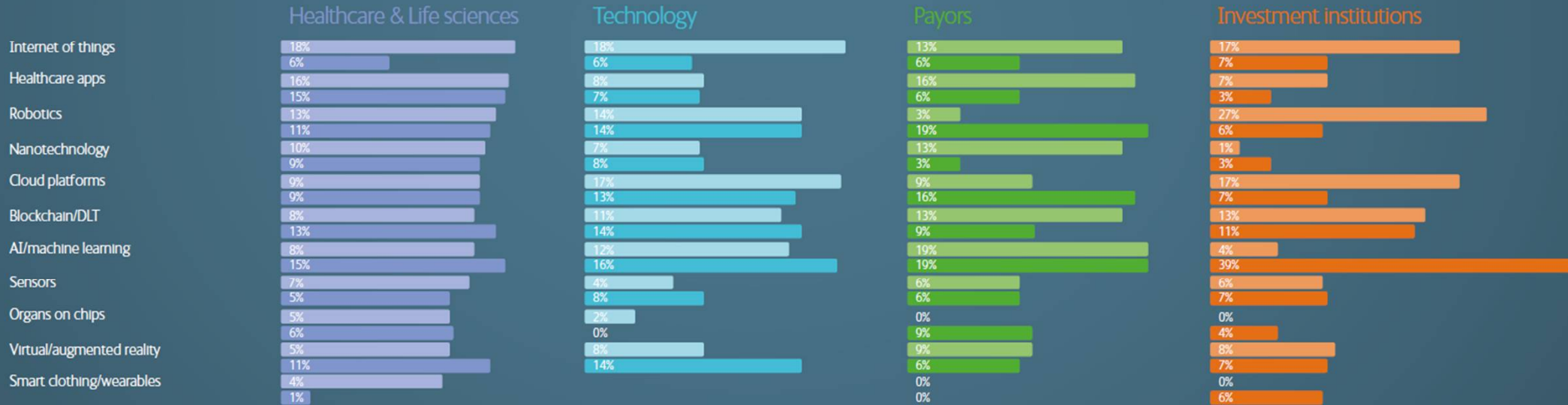
*Payers base is very low – results should be taken as indicative only

Digital Fusion

How smart collaborations will drive the healthcare revolution.

Across the sectors, organisations are exploring a range of new digital health technologies...

Which technology is currently most important to your digital health /investment strategy and which do you expect will be in three years' time?



Simmons & Simmons

Base: All respondents n=441, Payors n=32, Healthcare n=199, Tech n=136, Investment institutions n=71 NC. 4 Which is currently most important to your digital health/investment strategy and which do you expect will be in three years time? ●●●● Now ●●●● 3 years' time

Digital Fusion

How smart collaborations will drive the healthcare revolution.

say will be more important in the next 12 months

How important will the following be to your organisation in unlocking digital health opportunities in the next 12 months?

While minority investments and M&A will play an important role, it's collaborations that will fuel the digital health revolution

Collaborations (partnerships, JVs, alliances)

39%

44%

Minority Investments

31%

48%

M&A

32%

46%

Attracting staff with digital expertise

30%

40%

Internal capability build

26%

39%

Service contracts

25%

41%

Changing company culture/policies

22%

37%

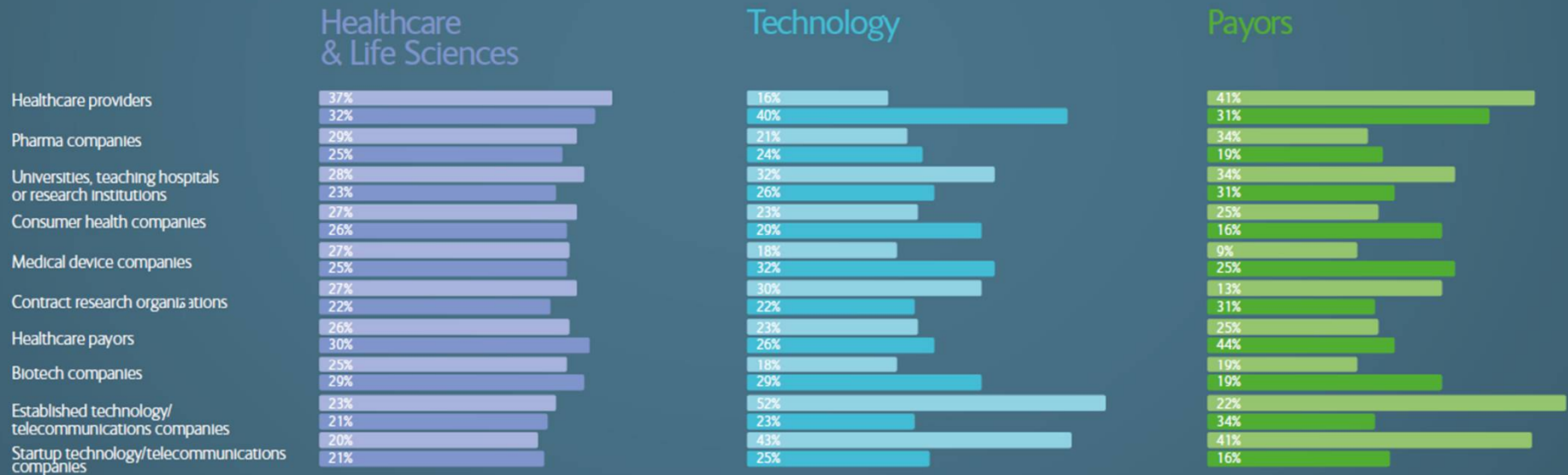
Very important Somewhat important

Digital Fusion

How smart collaborations will drive the healthcare revolution.

Organisations are looking across the sector divide for collaboration partners

Which types of organisations are most important for you to collaborate with in order to seize digital health opportunities and which will be in three years' time?



Digital Fusion

How smart collaborations will drive the healthcare revolution.

As collaborations get more complex, the **barriers to success** become more challenging

What are the main reasons why your digital health collaborations that have been unsuccessful didn't deliver the intended outcomes?

What is the greatest challenge to identifying and conducting due diligence on digital health collaborations/investments?



Base: n=440. Payers n=31, Healthcare n=199, Tech n=136, Investment institutions n=71

Digital Fusion

How smart collaborations
will fuel the healthcare
revolution.



Paolo Caldato

Managing Associate, Simmons & Simmons

<https://www.linkedin.com/in/paolo-caldato-b8101613/>

+44 7970 688 945

Simmons & Simmons