



Digital Health Trends

ONC Annual Meeting
Washington, D.C.
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Breakout Session #16: Digital Health Trends



Stephen Konya,
(Moderator)

Senior Innovation Strategist,
Office of the National
Coordinator for Health IT, HHS

@StephenKonya
@ONC_HealthIT



Mark Liber,

Moonshot Academy Manager,
Startup Health

@StartupHealth



Neil Patel,

President & CEO,
Healthbox

@neiljpat
@Healthbox



Health Innovation Funding Trends 2018

Mark Liber

Academy Manager

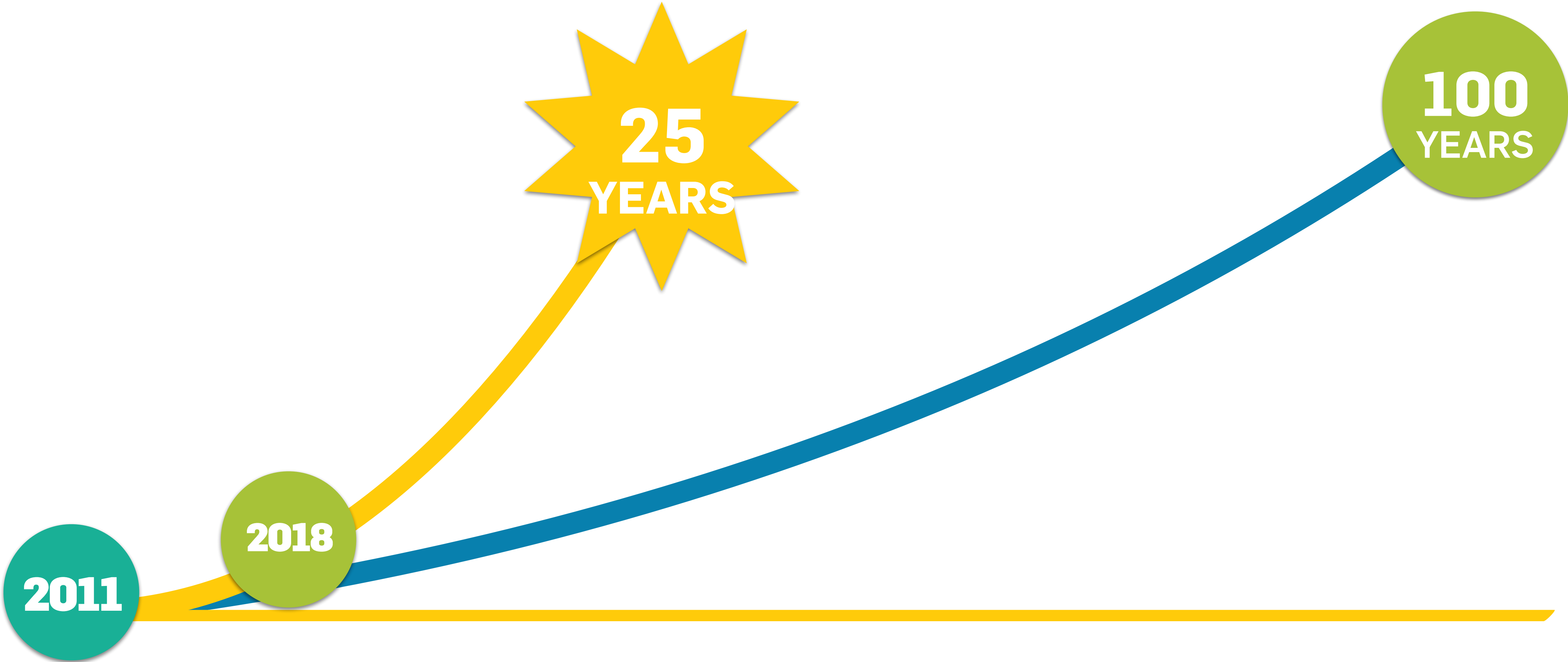
mark@startuphealth.com

[linkedin.com/in/markliber](https://www.linkedin.com/in/markliber)

OUR 25-YEAR MISSION

**COLLABORATE WITH ENTREPRENEURS
TO ACHIEVE 10 HEALTH MOONSHOTS**

ACHIEVING 100 YEARS OF PROGRESS IN 25



ACHIEVING HEALTH MOONSHOTS

- 1 Access to Care** Moonshot
Delivering quality care to everyone, regardless of location or income
- 2 Cost to Zero** Moonshot
Radically reducing the cost of care by a factor of a million
- 3 Cure Disease** Moonshot
Curing disease using data, technologies and personalized medicine
- 4 Cancer** Moonshot
Ending cancer as we know it
- 5 Women's Health** Moonshot
Prioritizing women's health, including preventive care and new research
- 6 Children's Health** Moonshot
Ensuring every child has access to quality care, particularly in underserved areas
- 7 Nutrition & Fitness** Moonshot
Providing access to a healthy environment and supporting an active lifestyle
- 8 Brain Health** Moonshot
Unlocking the mysteries of the brain to improve health, wellness and mental health
- 9 Mental Health & Happiness** Moonshot
Connecting mind, body and spirit in the pursuit of happiness
- 10 Longevity** Moonshot
Adding 50 healthy years to every human life

NETWORK OF 250+ COMPANIES IN 22 COUNTRIES



LONG-TERM PLATFORM TO BUILD EQUITY VALUE



FOLLOW-ON INVESTMENT FOR HEALTH TRANSFORMERS

StartUp Health Ventures

PINGAN

GUIDEWELL
Aurora Health Care



Jerry Levin
Fmr. Chair & CEO,
Time Warner



Ira Brind
Partner,
Brind Investments



Nick Turkal, MD
CEO & President,
Advocate Aurora Health



Roger Ehrenberg
Managing Partner,
IA Ventures

NOVARTIS

Otsuka



Mark Cuban
Owner,
Dallas Mavericks



Jason Finger
Founder & Former CEO,
Seamless



Brad Feld
Managing Director
Foundry Group



Nan Gardetto
President
Everyday Good Foundation

Chiesi

MASIMO



Steve Case
Chairman,
Revolution



Doug Galen
CEO,
RippleWorks

AdvocateAuroraHealth
Advocate Health Care Aurora Health Care

KAISER PERMANENTE



Esther Dyson
Executive Founder,
Way to Wallville



Linda Holliday
CEO,
CITIA



Wayne Kimmel
Managing Partner,
SeventySix Capital



Jon Kaplan
Head of Global Sales,
Pinterest

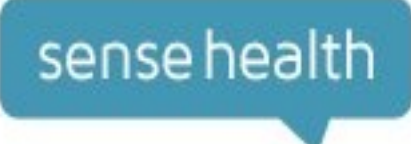











STARTUP HEALTH COMPANIES HAVE RAISED




\$1.5B

TO DATE

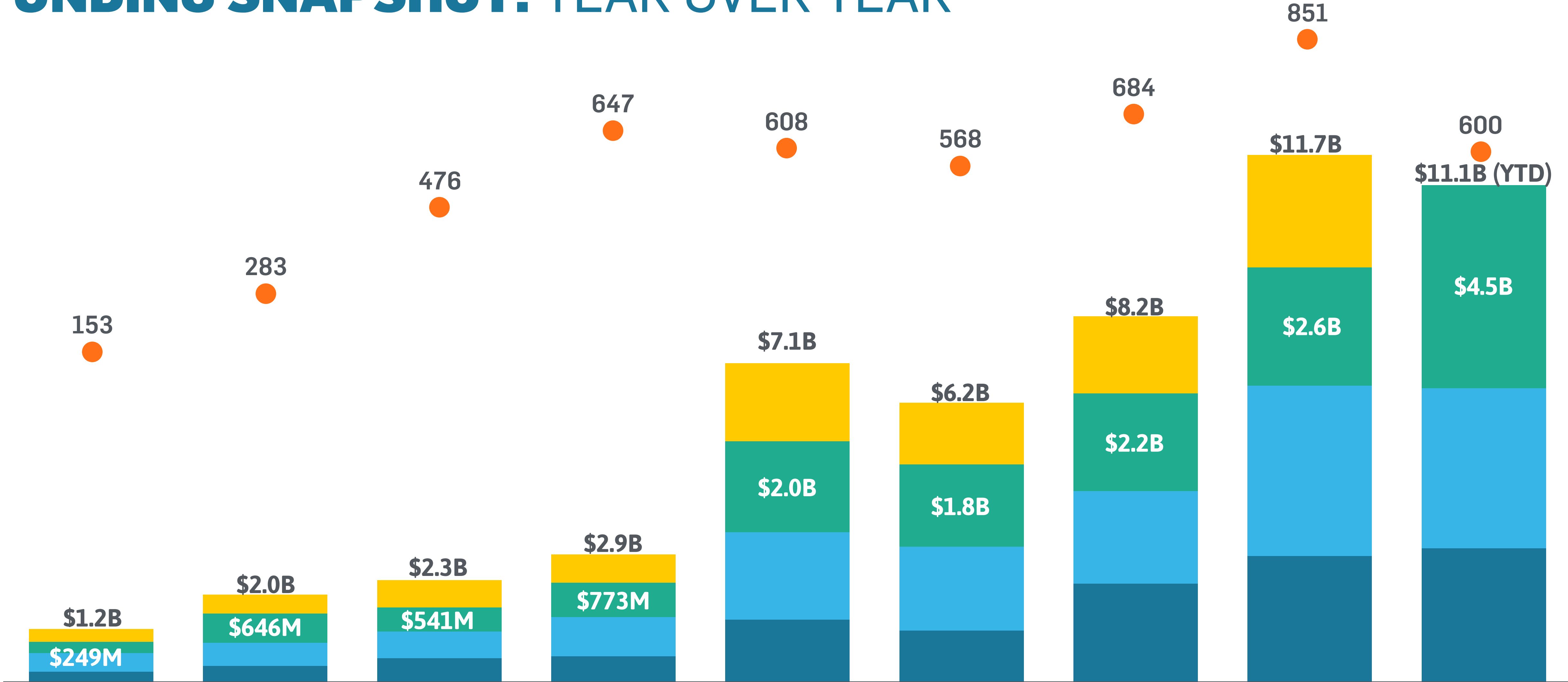
STARTUP HEALTH PORTFOLIO M&A ACTIVITY

 acquired  June 2018	 acquired by  June 2018	 acquired by  April 2018	 acquired  December 2017	 merged with  December 2017	 acquired by  September 2017
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 merged with  April 2017	 acquired by  January 2017	 acquired by  October 2016	 merged with  October 2016	 acquired by  October 2016	 acquired by  July 2016
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 acquired by  June 2016	 acquired by  May 2016	 acquired by  March 2016	 acquired by  May 2015	 acquired by  March 2014	 acquired by  October 2013	 acquired by  July 2013
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FUNDING SNAPSHOT: YEAR OVER YEAR

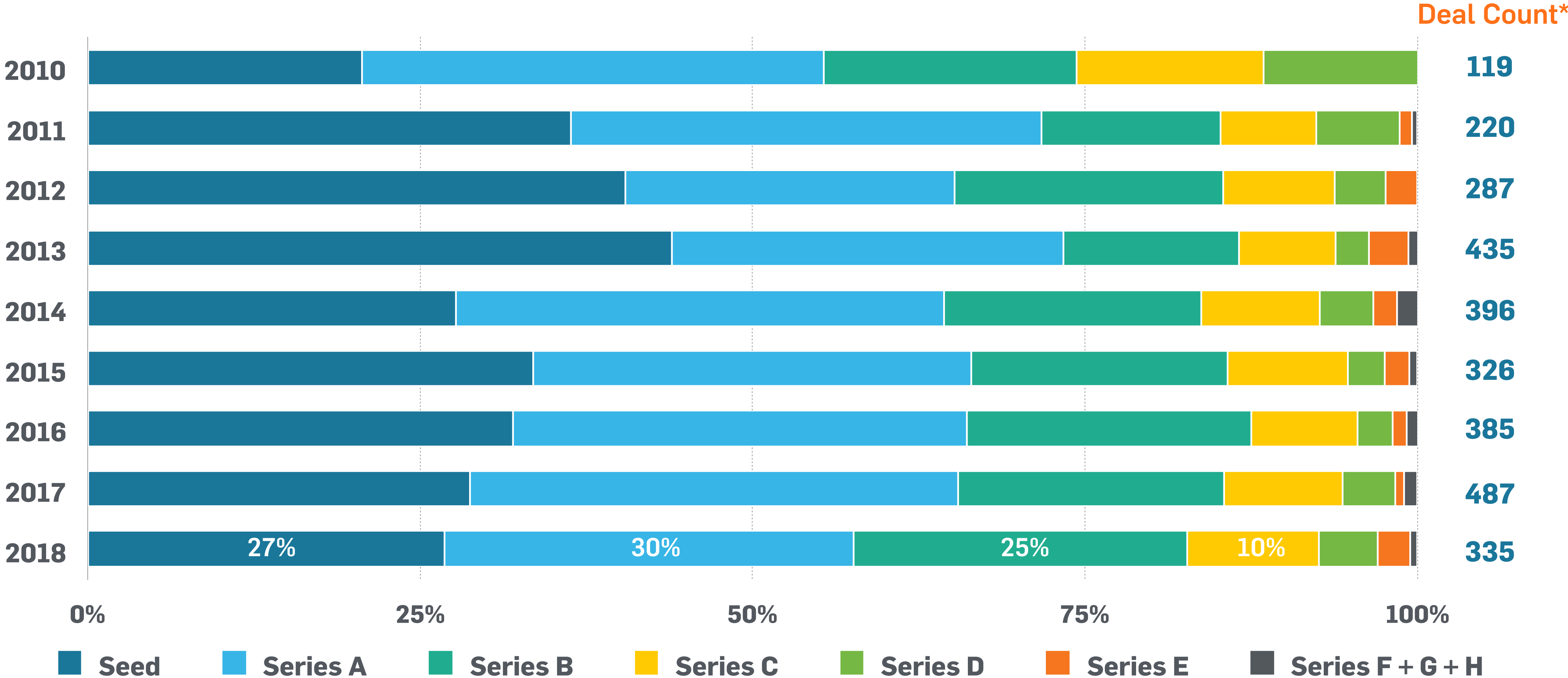


■ Q1
 ■ Q2
 ■ Q3
 ■ Q4
 ● Deal Count

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DEAL ACTIVITY BY STAGE

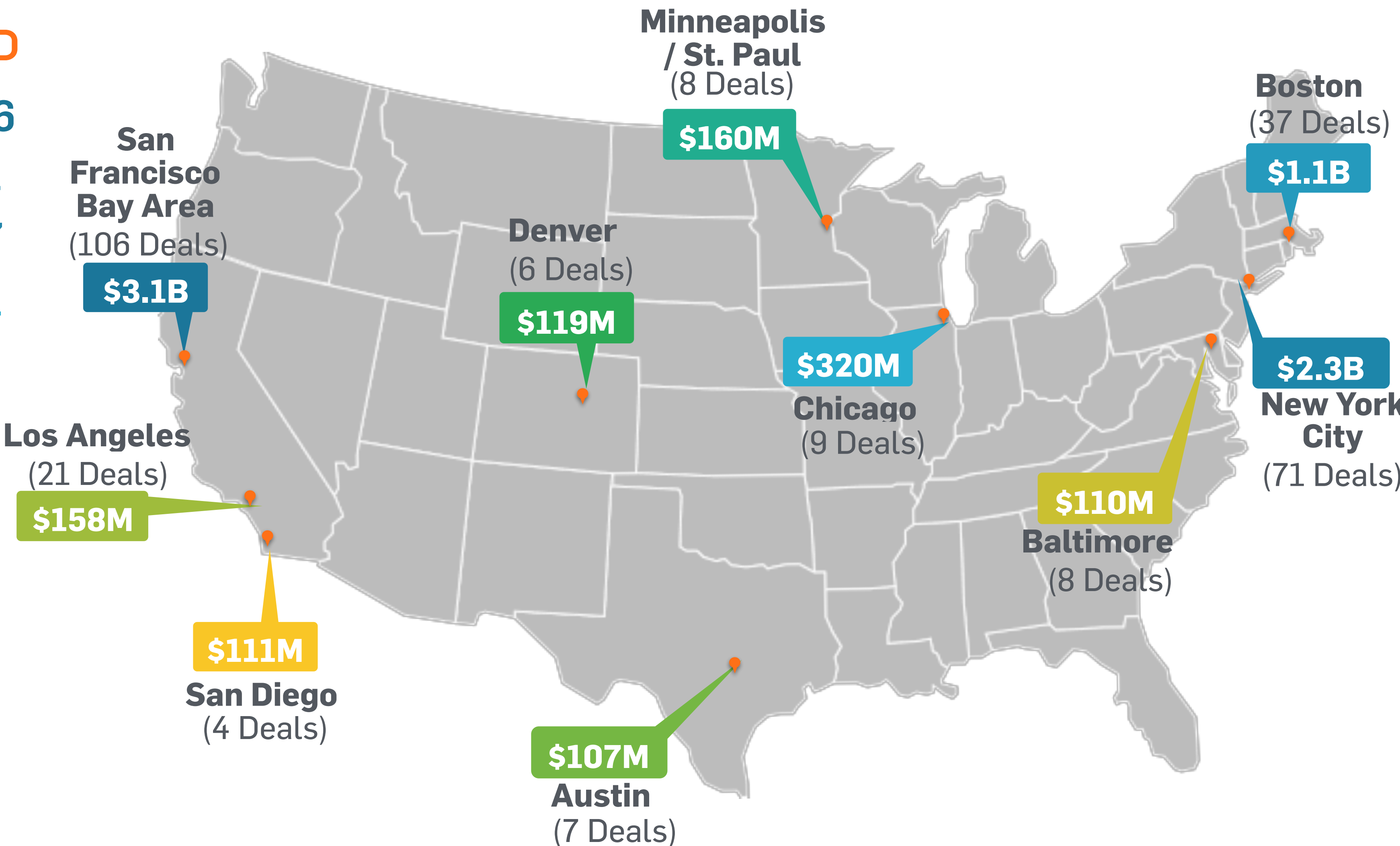


*Deal count only includes seed though series H rounds and does not include venture rounds, accelerator funding, or growth equity.












THE MOST ACTIVE U.S. METRO AREAS OF 2018 (YTD)

Region	Q3	YTD
1 SF Bay Area	29	106
2 New York City	25	71
3 Boston	13	37
4 Los Angeles	12	21
5 Chicago	2	9
6 Minneapolis	3	8
6 Seattle	3	8
6 Baltimore	3	8
7 Austin	0	7
8 Denver	2	6
8 Philadelphia	1	6
8 Miami	2	6



THE TOP 10 LARGEST DEALS OF 2018 YTD

	Company	Round Total	Function
1	 PELOTON®	\$550M	Wellness
2	 OSCAR	\$375M	Insurance
3	 grail	\$300M	Biometric Data Acquisition
3	 23andMe	\$300M	Personalized Health
5	 American Well®	\$290M	Patient Empowerment
6	 BUTTERFLY Network, Inc.	\$250M	Biometric Data Acquisition
7	 HeartFlow®	\$240M	Clinical Workflow
8	 Helix	\$200M	Biometric Data Acquisition
9	 OSCAR	\$165M	Insurance
10	 LinkDoc	\$149M	Population Health

STARTUP HEALTH INSIGHTS TAXONOMY

To achieve the **MOONSHOT** in **SPECIALTY, COMPANY** provides a **TECHNOLOGY** to a/an **END USER** for **FUNCTION** in **APPLICATION** market.

STARTUP HEALTH INSIGHTS NEW SECTOR METHODOLOGY

Wellness:	improves patient/consumer's holistic health
Patient Empowerment:	enables patient to take control of his or her health
Research:	aids primarily in health and biomedical research
Personalized Health:	enables patient/consumer to make informed decisions through data data
Admin Workflow:	improves operational efficiency & performance in admin setting
Clinical Workflow:	improves operational efficiency & performance in clinical setting
Biometric Data Acquisition:	enables discovery, collection, & acquisition of body-related data
Population Health:	impacts the health outcomes of a group of individuals
Education + Content:	educates or trains individuals or entire populations
Insurance:	improves the health insurance, referral, and billing process

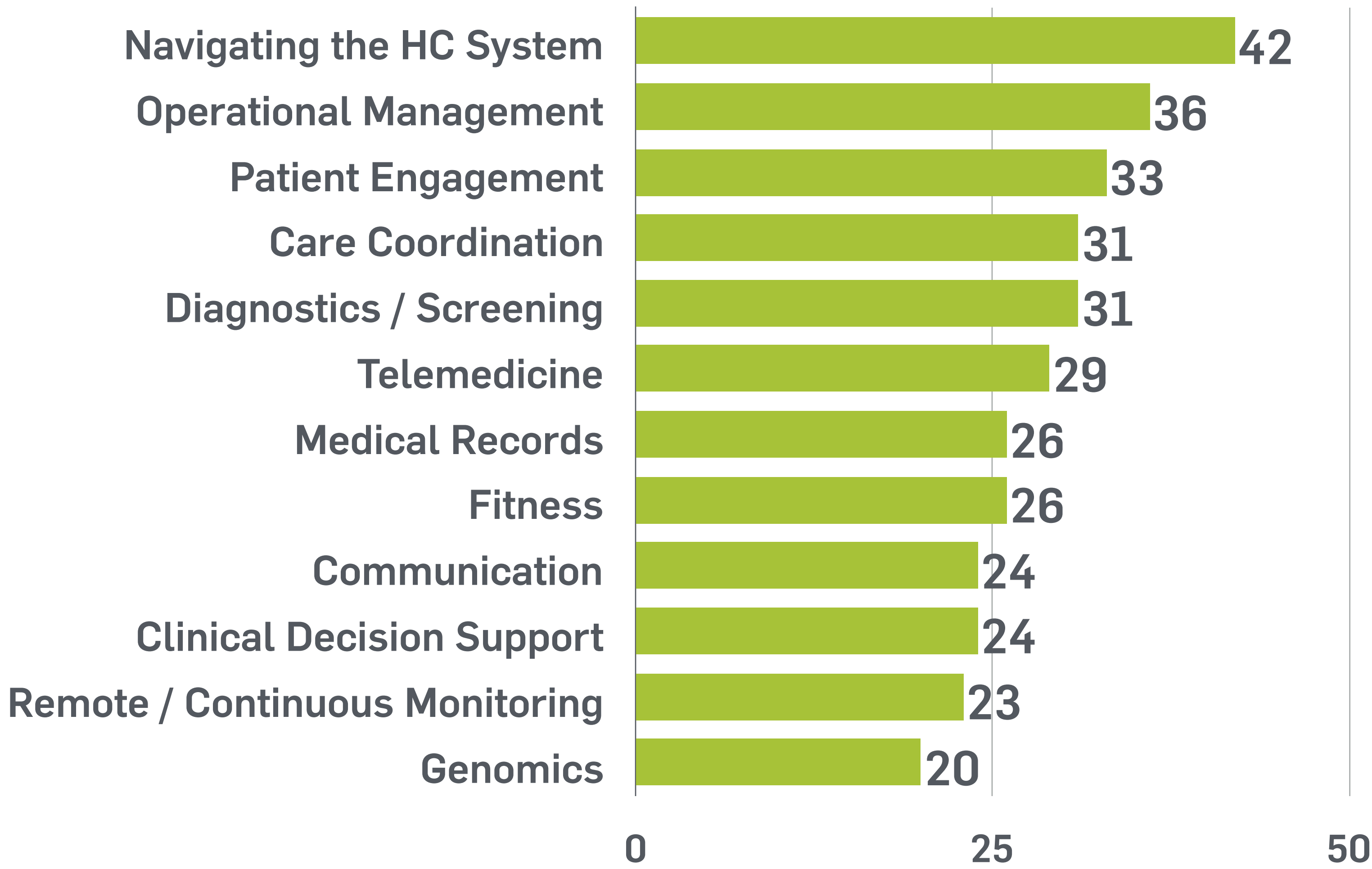
THE TOP 10 MOST ACTIVE FUNCTIONS OF 2018

	Function	Total Raised	Deal Count	Avg. Deal Size	Median Deal Size
1	Patient Empowerment	\$2.1B	149	\$14.3M	\$3.0M
2	Wellness	\$1.6B	64	\$25.2M	\$7.0M
3	Biometric Data Acquisition	\$1.5B	50	\$29.8M	\$8.7M
4	Clinical Workflow	\$1.1B	98	\$10.8M	\$3.4M
5	Admin Workflow	\$1.0B	85	\$12.0M	\$3.2M
6	Research	\$964M	37	\$24.7M	\$14.5M
7	Personalized Health	\$857M	54	\$15.9M	\$6.0M
8	Insurance	\$854M	12	\$71.1M	\$31.2M
9	Population Health	\$701M	27	\$25.9M	\$14.0M
10	Education	\$280M	11	\$25.4M	\$23.9M

OUR TAXONOMY LETS US LOOK DEEPER

To achieve the **MOONSHOT** in **SPECIALTY**, **COMPANY** provides a **TECHNOLOGY** to a/an **END USER** for **FUNCTION** in **APPLICATION** market.

THE MOST ACTIVE APPLICATIONS OF 2018 (YTD)*



**StartUp Health
Company Spotlights:**

Telemedicine



CLOUDBREAK

For hospitals that are missing a piece of the clinical care puzzle, Cloudbreak is a unified telemedicine platform delivering multiple specialties over a proprietary broadband network, connecting 800+ hospitals nationwide over 85k times per month.

Diagnostic/Screening



For high risk patients who are likely to develop comorbid conditions or associated complications, Oxitone provides hospital-grade, digital continuous care using the world's first FDA-cleared wrist pulse oximetry monitor with an AI-driven early disease detection & alert system.

THE MOST ACTIVE END USERS OF 2018 (YTD)*

**StartUp Health
Company Spotlights:**



For hospital clinical, quality improvement, financial, marketing, and supply chain teams, Biome's machine-driven, human-enabled solutions combine clients' clinical and financial data with a community-driven library of clinically relevant benchmarks, risk-stratification algorithms, and performance measures.

Pharma



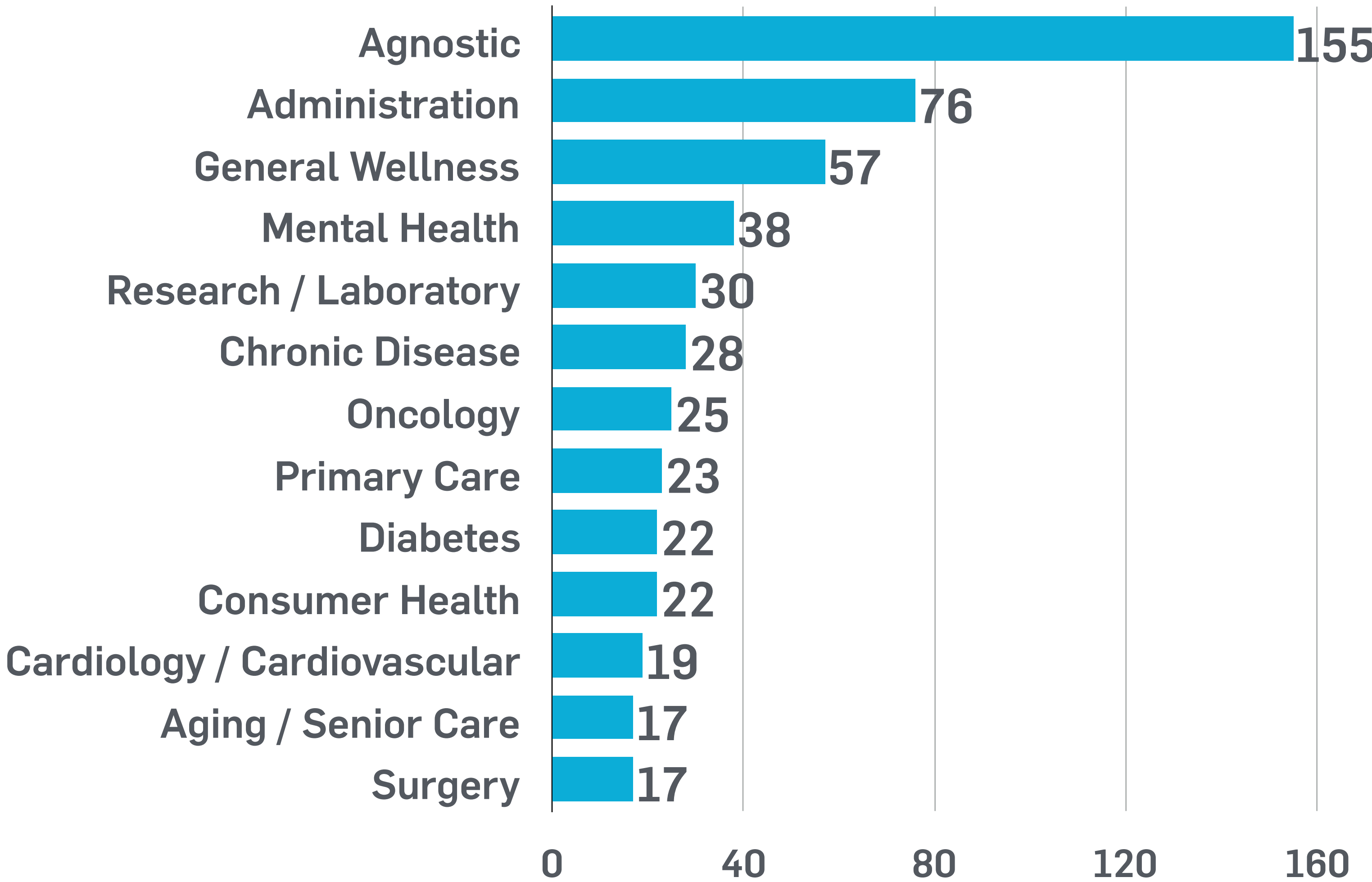
For pharmaceutical companies developing precision medicine solutions, Sanguine partners with patients to create Data-Integrated Patient Communities and uses AI to match patients to clinical trials faster.

	End User	Total Raised	Deal Count	Average Deal Size	Median Deal Size
1	Provider	\$4.5B	241	\$18.6M	\$4.6M
2	Patient	\$4.3B	243	\$19.6M	\$3.8M
3	Consumer	\$3.3B	170	\$19.6M	\$5.2M
4	Employee	\$1.02B	25	\$40.8M	\$6.5M
5	Employer	\$1.01B	24	\$42.1M	\$8.5M

*The end user is the organization or individual who benefits from the Company's value. Deals may be included in multiple end user types.



THE MOST ACTIVE SPECIALTIES OF 2018 (YTD)*



**StartUp Health
Company Spotlights:**

Oncology



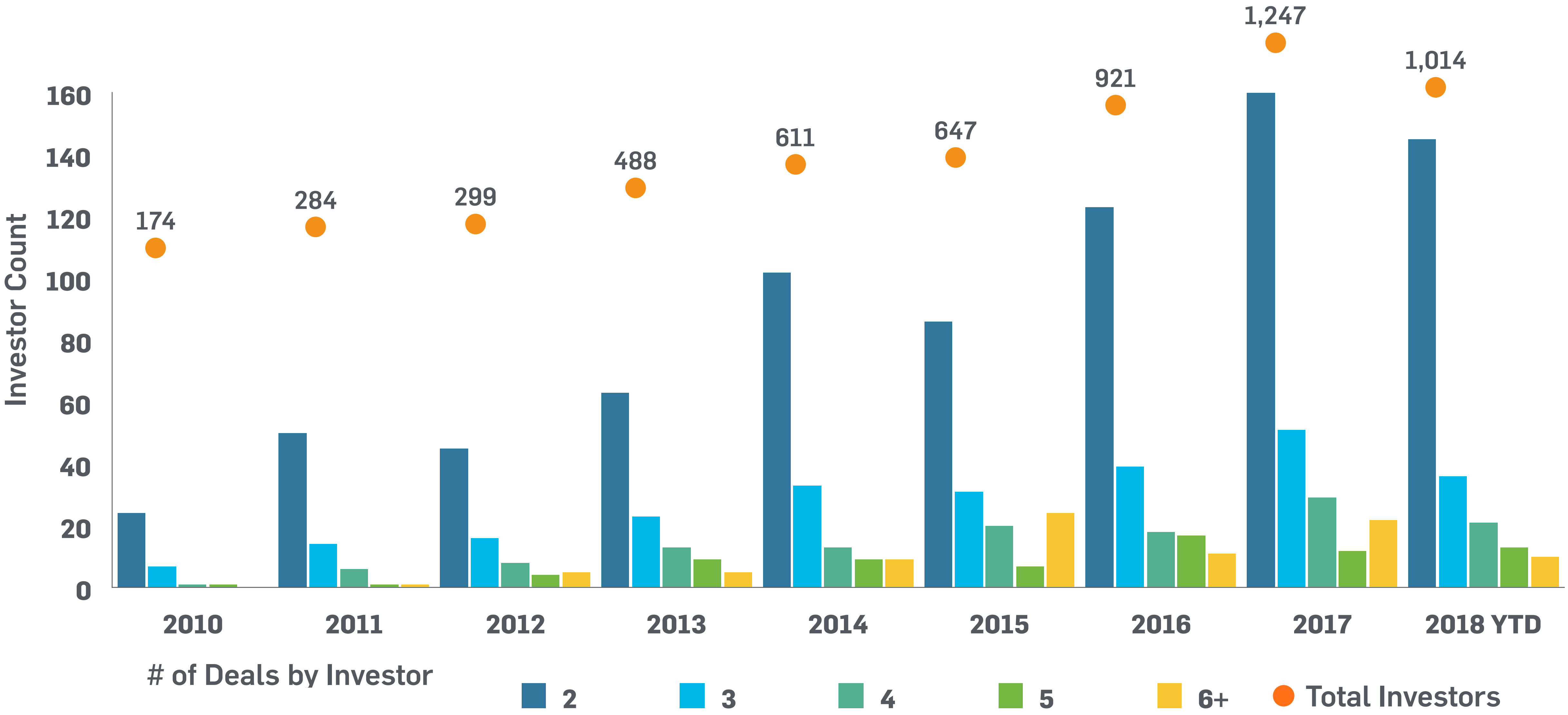
For healthcare enterprises, cancer patients and their caregivers, Savor Health is an AI-based personalized nutrition care management and patient engagement platform that can reduce healthcare costs, increase therapy adherence, improve treatment outcomes, and empower patients to take control of their disease.

Cardiology



For doctors looking to detect heart disease, the world's #1 cause of death and disability, eko.ai's machine learning based software eliminates the manual processes and the expensive hardware inherent in reading cardiac ultrasounds, producing diagnostic recommendations in seconds instead of hours.

NUMBER OF INVESTORS (2010-2018 YTD)



WHAT'S BEHIND ALL THIS ACTIVITY?

- The ACA
- ~~Fee-for-service~~ → Value-based care
- FDA guidance on software-as-a-medical device (SaMD)
- FDA pre-certification program
- Open APIs / Pressure for interoperability
- Drug pricing, more approvals of generics
- CMS reimbursement codes for telemedicine, remote monitoring (ex. CPT code 99091 & its unbundling)
- CMS' MyHealthEData
- GDPR
- Amazonization of Healthcare, consumer pressure, “free market”
- High clinician burnout rates ; high employer insurance costs

JOIN THE MOVEMENT

Meet the entrepreneurs transforming health on StartUp Health HQ.

Join today at hq.startuphealth.com



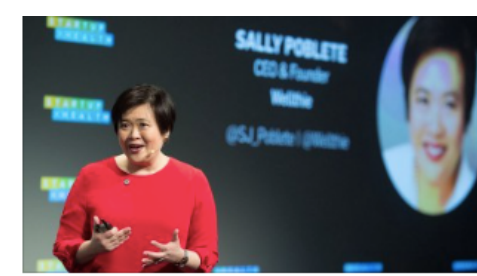
StartUp Health Welcomes 10 Companies From Four Countries as Part of Global Expansion



This Fast-Growing Startup Is Giving Health Insurance the Full Digital Make-Over



Meet Trusty.care: "Turbo Tax for Medicare"



A New Approach to Health Insurance Puts Small Businesses Front and Center



STARTUP + HEALTH INSIDER

The Digest for Health Transformers & Changemakers



Mark Liber
Academy Manager
mark@startuphealth.com
[linkedin.com/in/markliber](https://www.linkedin.com/in/markliber)

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