

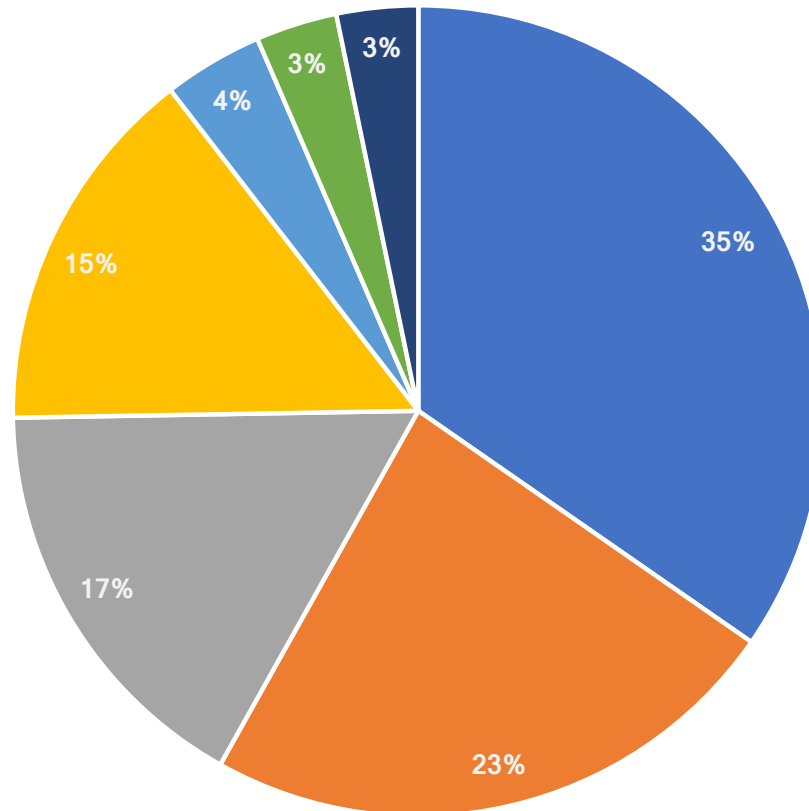
DIGITAL HEALTH INVESTMENT SURVEY

SPONSORED BY:



**Results of the survey are based on responses from 167 of the 300 participants at the Digital Healthcare Innovation Summit on November 30, 2017.*

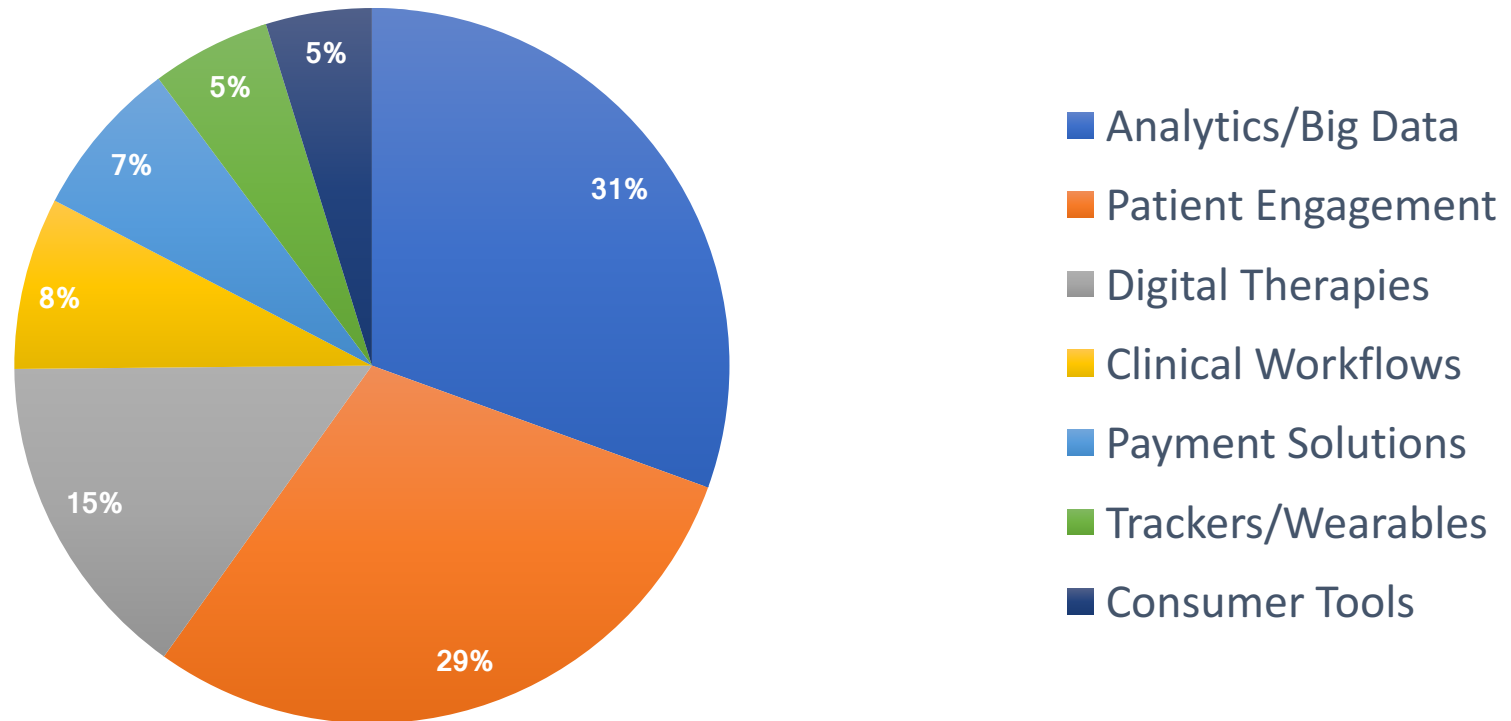
320+ ATTENDEES REPRESENTING 4 COUNTRIES AND 26 STATES



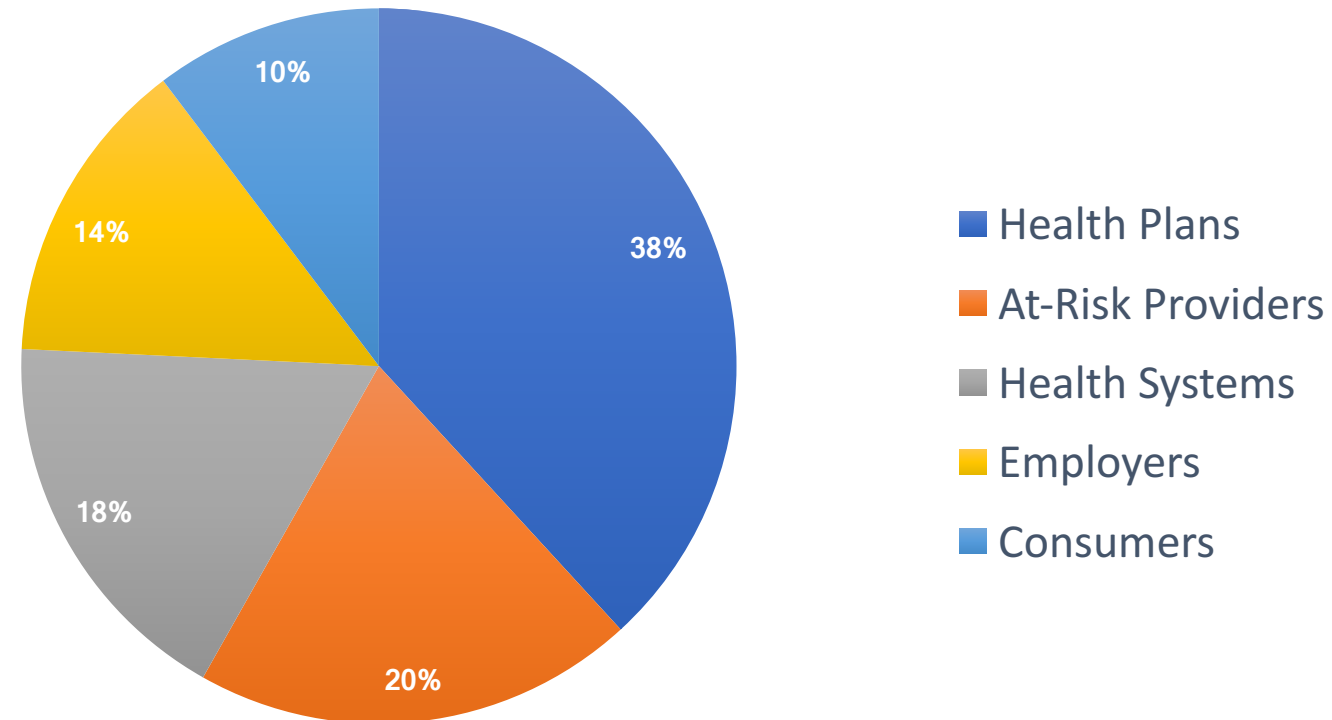
- Massachusetts
- Other
- California
- New York
- Minnesota
- Illinois
- Maryland

Other States Include: Connecticut, District of Columbia, Florida, Georgia, Hawaii, Idaho, Louisiana, Michigan, Missouri, New Jersey, North Carolina, Ohio, Pennsylvania, Rhode Island, South Dakota, Tennessee, Texas, Utah, Virginia, Washington

AS THE BOOM IN DIGITAL HEALTH CONTINUES, WHAT AREAS ARE OF MOST INTEREST TO YOU?



WHICH CUSTOMER BASE REPRESENTS THE STRONGEST OPPORTUNITY FOR DIGITAL HEALTH START-UPS?



HAVE VENTURE CAPITAL INVESTORS COMMITTED TOO MUCH CAPITAL TO THE DIGITAL HEALTH SECTOR?



72%

A donut chart with a red fill and a thin red outline. The fill represents 72% of the total, leaving a white gap for the remaining 28%.

NO

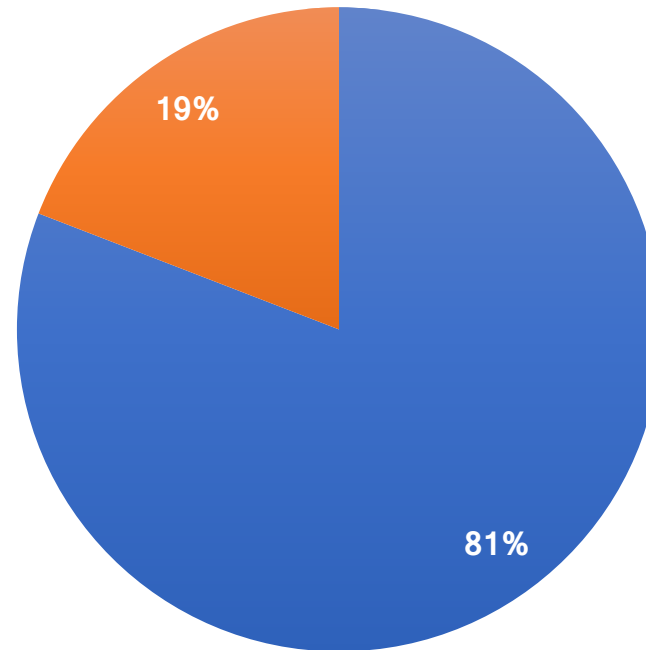


28%

A donut chart with a red fill and a thin red outline. The fill represents 28% of the total, leaving a white gap for the remaining 72%.

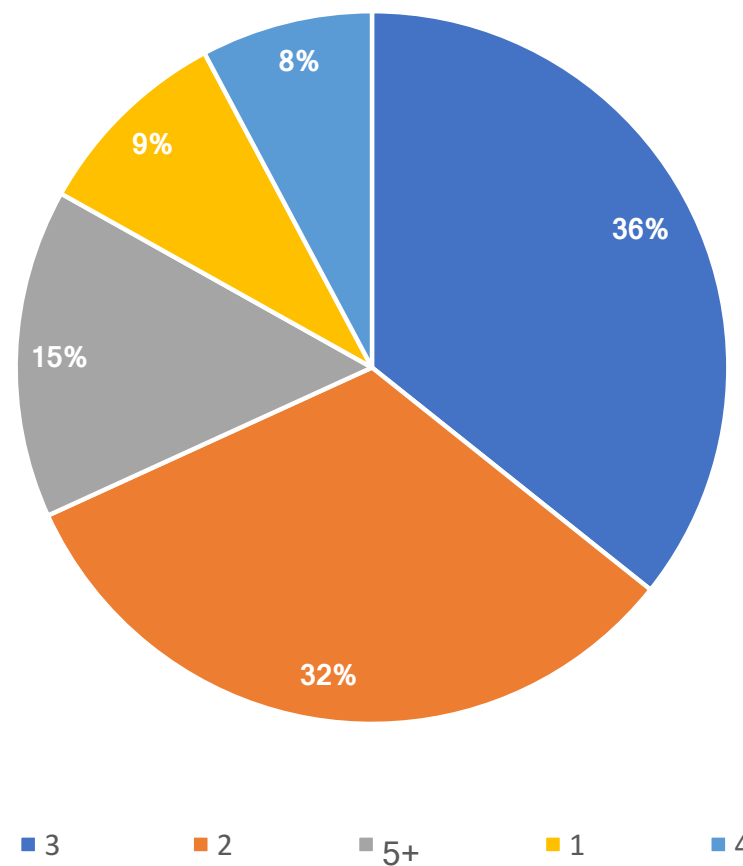
YES

IS THE LACK OF RECENT DIGITAL HEALTH IPOs A CAUSE FOR CONCERN, OR DUE TO THE EARLY NATURE OF THE SECTOR?

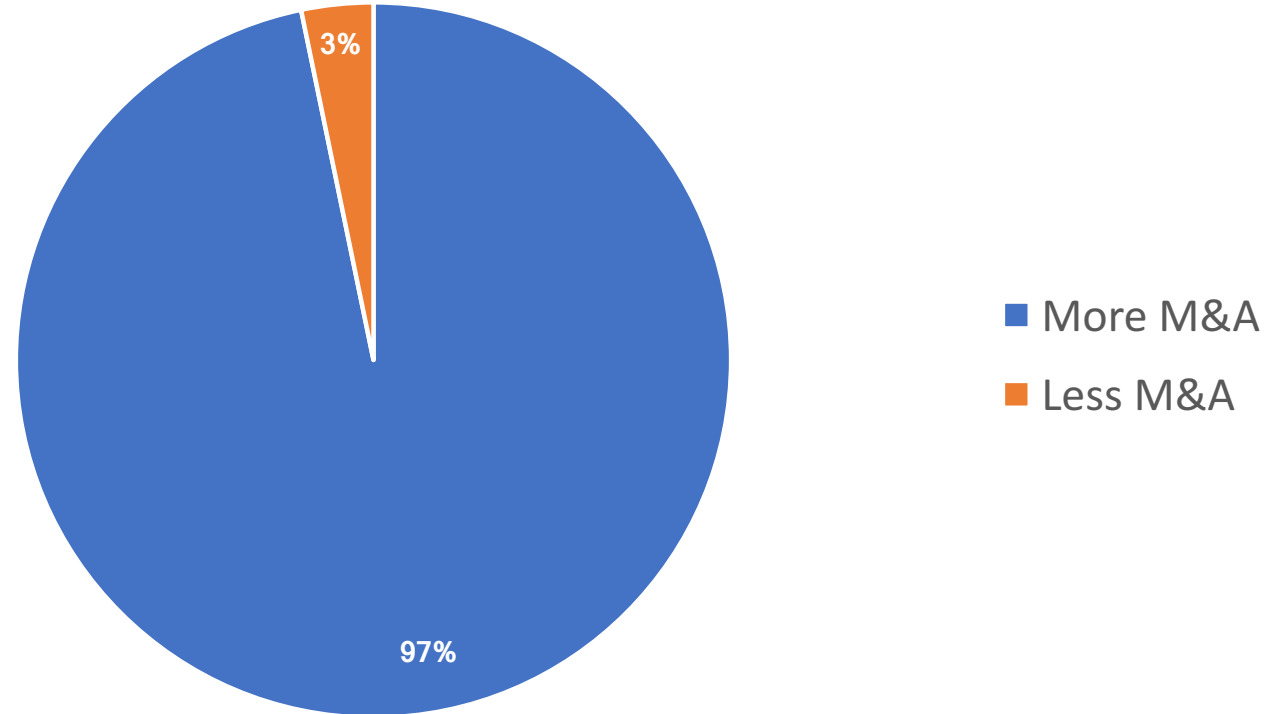


■ No, Early Nature of the Sector ■ Yes, Cause for concern

HOW MANY DIGITAL HEALTH IPOs DO YOU PREDICT THERE WILL BE IN 2018?



DO YOU ANTICIPATE MORE OR LESS M&A ACTIVITY IN 2018?



WILL THE FDA'S CREATION OF AN APPROVAL PATH FOR DIGITAL HEALTH START-UPS IMPACT THE NUMBER OF COMPANIES THAT GET FUNDED?



82%

NO



18%

YES

DO YOU BELIEVE THAT VALUE BASED HEALTH IS HERE TO STAY,
REGARDLESS OF SUPPORT IN WASHINGTON?



99%

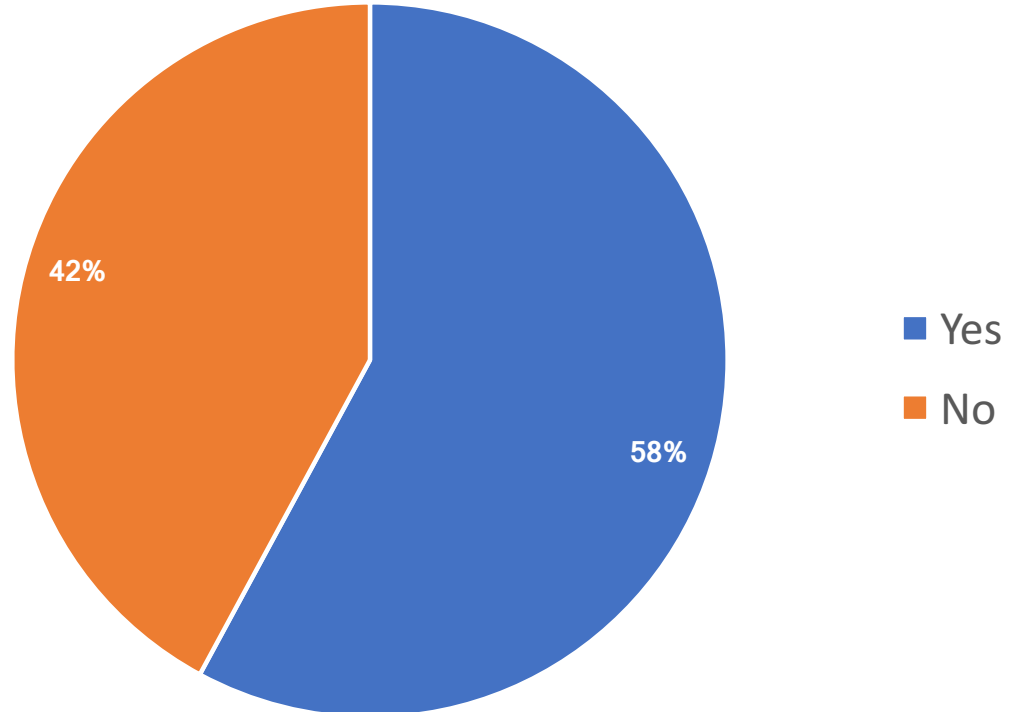
YES



1%

NO

DO YOU FAVOR "MEDICARE FOR ALL"?



HAS DIGITAL HEALTH PROVEN ITS VALUE PROPOSITION TO DATE?

