

# THE COLLABORATION FOR HEALTHIER LIVES

## COALITION OF ACTION

DIGITAL SOLUTIONS FOR PREVENTATIVE HEALTH PLAYBOOK

THE CONSUMER GOODS FORUM

2024



# KEARNEY

In the dynamic landscape of global healthcare, the prominence of Preventative Health has reached unprecedented levels. We stand at a critical juncture where the proactive preservation of wellbeing emerges not only as a moral obligation but also as a strategic imperative for societies and economies worldwide.

At the core of the Preventative Health ethos lies a profound shift in perspective—one that empowers individuals to assume active roles in their health journeys. Through prioritised education, heightened awareness, and timely interventions, individuals gain the agency to make informed decisions, thereby improving personal outcomes and alleviating strain on healthcare infrastructures globally.

Integral to this empowerment is the transformative influence of digital technology. With the advent of innovative solutions, businesses now possess unparalleled tools to engage, educate, and support consumers in their pursuit of Preventative Health. From wearable devices monitoring vital signs to telehealth platforms delivering personalised guidance, digital technology is revolutionising wellness practices, rendering them more accessible, tailored, and impactful.

In this context, Preventative Health presents a distinctive opportunity for manufacturers and retailers to cultivate deeper connections with their consumers. By aligning products, services, and initiatives with Preventative Health objectives, businesses transcend transactional interactions, becoming genuine partners in consumer well-being. This not only deepens consumer connections but also yields tangible societal benefits, with businesses serving as catalysts for positive societal change.

However, the pursuit of Preventative Health is not a solitary endeavour—it necessitates collaboration across industries and sectors, manufacturers, and retailers. By dismantling silos and fostering mutually beneficial partnerships, businesses can harness collective expertise and resources to address multifaceted health challenges head-on. Whether through knowledge sharing, solution co-creation or technology partnerships, collaborative efforts lie at the heart of effective Preventative Health strategies, amplifying impact and expediting progress towards shared objectives.

In conclusion, the imperative for Preventative Health has never been more pressing, nor the opportunities more abundant. To support businesses on their journey towards a healthier future, The Consumer Goods Forum (CGF) and Kearney jointly developed this Playbook. It equips business leaders and key decision makers with a practical toolset to get started or amplify existing Preventative Health efforts.

Thank you for reading. We hope you find this Playbook insightful and empowering for your business' Preventative Health journey.



**Sharon Bligh**  
Director of Health & Sustainability,  
The Consumer Goods Forum



**Mirko Warschun**  
Senior Partner, Kearney

## INSIGHTS FROM CGF MEMBERS



“  
At AS Watson, we believe that promoting preventative health is crucial to improve wellbeing for all.

Malina Ngai, CEO  
**AS Watson**  
(Asia and Europe)

“  
As a Board Co-Sponsor of the CHL Coalition of Action I believe that, through CEO engagement and by coming together as manufacturers and retailers, we can help scale preventative health solutions.

Brian McNamara, CEO  
**Haleon**

## EXECUTIVE SUMMARY

**Preventative Health** represents a **significant opportunity for consumer goods manufacturers and retailers to contribute to healthier lives** by influencing consumer preferences and lifestyle choices while creating competitive advantage and business growth.

As part of the **Consumer Goods Forum Collaboration for Healthier Lives Coalition of Action (CHL)**, a new workstream launched in 2023 which **focuses on Preventative Health and consumer self-care** with the following goals:

1. Develop **strategic insights** in prevalent health concerns, policy landscape and innovative business solutions;
2. Benchmark and develop **practical interventions** with focus on digital and emerging technology solutions;
3. Develop a **framework as a practical toolbox** of resources for CGF members.

With the Preventative Health working group for CHL (Ahold Delhaize, AS Watson, Grupo Alen, Haleon, Kenvue, Procter & Gamble, and Unilever) and the support of Kearney, a global strategy and management consultancy, this Playbook was developed to serve as a **guide to designing digital solutions for Preventative Health**. It contains the following toolkits to help consumer goods companies create and execute successful and impactful initiatives:

- ▶ **Guiding Framework:** Illustrating the journey of designing pilots in Preventative Health and Self-care;
- ▶ **Health Maps:** Covering relevant health issues based on impact (i.e., top markets of CGF members by revenue share, state of health equity);
- ▶ **Technology Solutions:** Including five technology categories for digital solutions in Preventative Health and Self-care;
- ▶ **Case Studies:** Showcasing innovative examples of business interventions in Preventative Health and Self-care across the customer journey;
- ▶ **Best Practices:** Sharing guidance on incentivising participation across stakeholders and scaling for impact of Preventative Health and Self-care interventions.

IF YOU ONLY HAVE 10 MINS, READ THIS ...

## Business Case, p. 11



## How to Design Pilots, p. 15



## Incentivizing Partners, p. 21



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# 01

## INTRODUCTION

*"Health should be accessible to all, and it starts from an active lifestyle where manufacturer-retailer collaboration plays a key role."*



Hanks Lee,  
Director – Corporate  
Communications and  
Brand Marketing

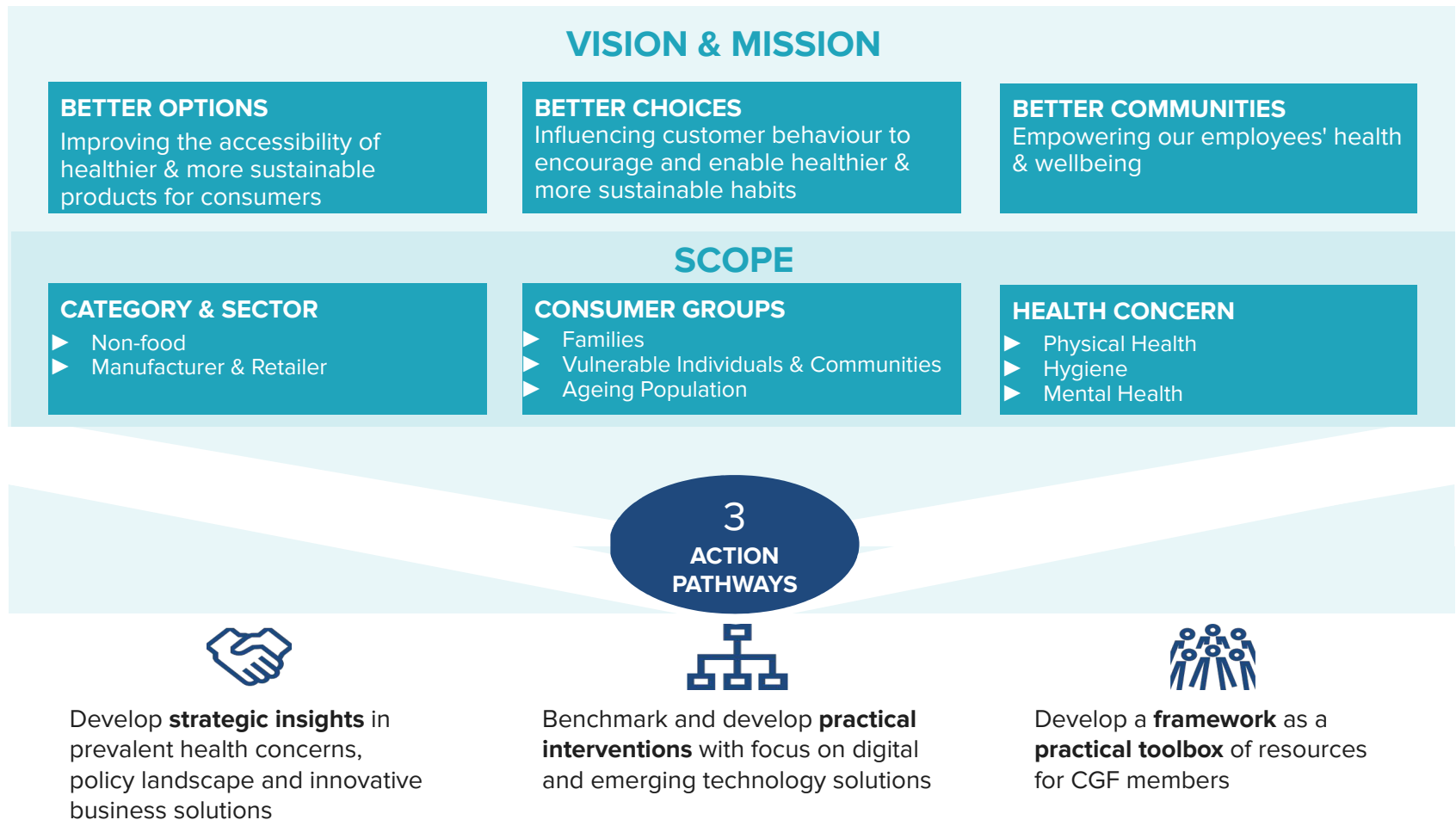


# CHL HAS ESTABLISHED A PREVENTATIVE HEALTH WORKSTREAM TO ENHANCE PREVENTATIVE CARE BY PROMOTING HEALTH, PREVENTING ILLNESS & MAINTAINING GOOD HEALTH FOR INDIVIDUALS, FAMILIES AND COMMUNITIES



KEARNEY

Self-care is the ability of individuals, families and communities to promote health, prevent disease, maintain health, and cope with illness and disability with or without the support of a health worker.



Source: [The Consumer Goods Forum](#)



# 02

## EMPOWERING CONSUMERS

*"Patients are increasingly behaving like consumers, creating an opportunity for continuous innovation and collaboration within the consumer goods industry."*



Liz Caton,  
Senior Vice President,  
Sales



# THE CONSUMERISATION OF HEALTHCARE IS HAPPENING ON A GLOBAL SCALE WITH PATIENTS WANTING MORE AUTONOMY OVER THEIR HEALTHCARE



KEARNEY

Rising healthcare costs and a growing/ageing population are driving the need for preventive care models.

## EMERGING PATIENT TRENDS



### SELF-CARE AT HOME

More patients are **taking charge of their care and treatment at home**, requiring more access to information, resources and medication. This has given rise to the **development of digital ecosystems**, ranging from individual solutions (e.g., health apps) to digital communications (e.g., social influencers).



### PERSONALIZED CARE

During the treatment journey, patients want to play an **active role in the design and management of their healthcare plans** by supplementing traditional healthcare management with innovative market support services. These include **wearable diagnostics and broader lifestyle services** like nutrition and exercise.



### CARE UNDER PRESSURE

**Ageing populations** and the **growing prevalence of chronic disease** are creating **new demands for disease management** and new opportunities for healthcare providers to offer **scalable and patient-centric solutions**.



### PRIVATE CARE (I.E., SELF-FINANCED)

Globally, consumers directly control an estimated **\$330bn annually in out-of-pocket healthcare expenses**. Their health and lifestyle **choices** have the potential to **affect over 60% of all healthcare spending**.

The observable trend of patients adopting a more consumer-oriented mindset in their pursuit of preventative care underscores a discernible inclination toward innovative and consumer-centric product and service solutions.

Source: Internal Kearney document, Kearney

# 02

## EMPOWERING CONSUMERS

*"Digital tools have become indispensable in the acceleration of preventative healthcare initiatives."*



Lotte Vermeer, Health & Sustainability

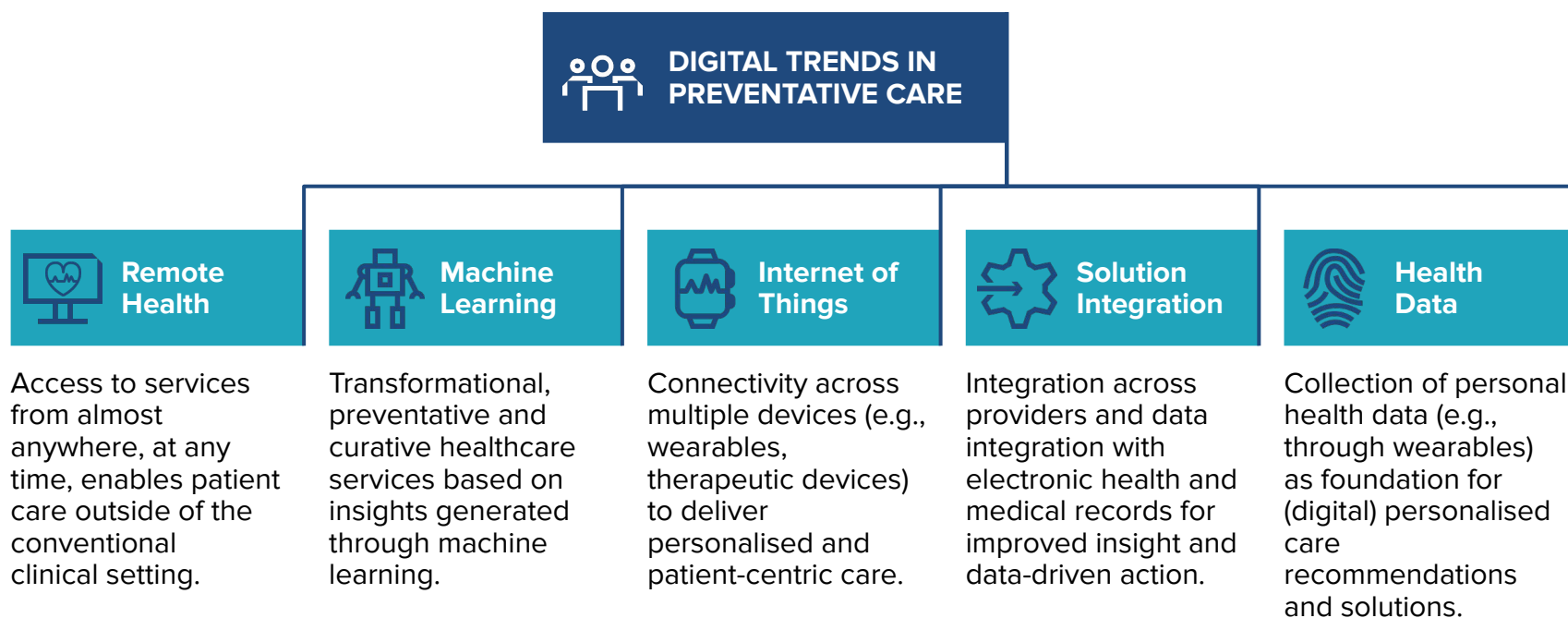


# THE SWIFT PROGRESSIONS IN DIGITAL HEALTH DEVELOPMENTS FACILITATE ENHANCED OUTCOMES IN PREVENTATIVE HEALTH



KEARNEY

## KEY DIGITAL TRENDS IN PREVENTATIVE CARE




Source: Kearney



# DIGITAL HEALTH AND WELLNESS SOLUTIONS HAVE THE CAPACITY TO TARGET VARIOUS RISK FACTORS, PROMOTING PROACTIVE HEALTHCARE AND WELLBEING

## OVERVIEW OF HEALTH RISK FACTORS

Deep Dive				
BEHAVIOURAL 	ENVIRONMENTAL 	PHYSIOLOGICAL 	DEMOGRAPHIC 	GENETIC 
<p>Relate to actions that an individual has chosen to take with relevant influence (e.g., eliminated or reduction) through lifestyle or behavioural choices, e.g.,:</p> <ul style="list-style-type: none"> <li>▶ Poor oral hygiene</li> <li>▶ Smoking (e.g., tobacco)</li> <li>▶ (Increased) alcohol consumption</li> <li>▶ (Poor) nutritional choices</li> <li>▶ Physical inactivity</li> <li>▶ Prolonged sun exposure</li> <li>▶ Unprotected sex</li> </ul>	<p>Cover external influences from the environment that may impact an individual's health, which may include physical, socioeconomic, political, cultural and ecological factors, e.g.,:</p> <ul style="list-style-type: none"> <li>▶ Access to clean water and sanitation</li> <li>▶ Access to nutritional foods</li> <li>▶ Air quality</li> <li>▶ Occupational settings and related risks</li> <li>▶ Social settings</li> </ul>	<p>Relate to an individual's body or biology. They may be influenced by a combination of genetic, lifestyle and other broad factors, e.g.,:</p> <ul style="list-style-type: none"> <li>▶ Obesity</li> <li>▶ Malnutrition</li> <li>▶ High blood pressure</li> <li>▶ High blood cholesterol</li> <li>▶ High blood sugar (glucose)</li> </ul>	<p>Include risk factors that relate to the overall population, e.g.,:</p> <ul style="list-style-type: none"> <li>▶ Age</li> <li>▶ Gender</li> <li>▶ Ethnicity</li> <li>▶ Population sub-groups, e.g., based on religion or income</li> </ul>	<p>Cover risk factors that are based on an individual's genes, e.g.,:</p> <ul style="list-style-type: none"> <li>▶ Diseases stemming entirely from an individual's genetic make-up (e.g., cystic fibrosis, muscular dystrophy)</li> <li>▶ Conditions stemming from the interaction between genes of the individual and environmental factors (e.g., asthma, diabetes)</li> </ul>
 	 	 	 	 

Source: [EUPATI](#), Kearney

# 02

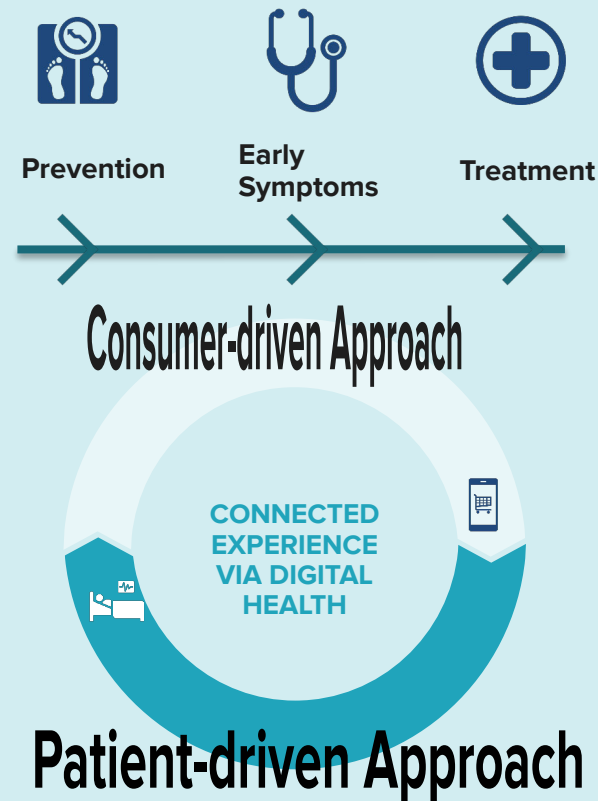
## EMPOWERING CONSUMERS

### PREVENTIVE HEALTH PRODUCTS AND SERVICES ARE UNIQUELY POSITIONED TO PROVIDE A CONNECTED AND PERSONALISED HEALTHCARE EXPERIENCE



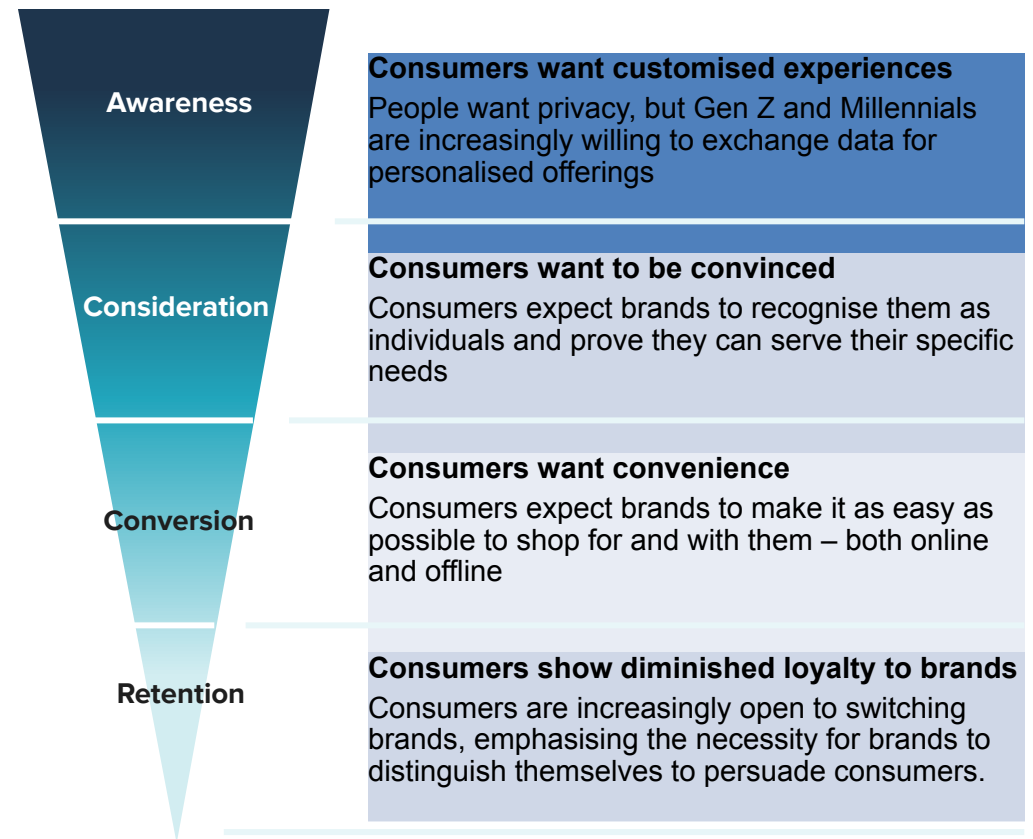
KEARNEY

#### CONSUMERISATION OF HEALTH FUELS THE DEMAND FOR DIGITAL SOLUTIONS



Source: Kearney

#### PERSONALISATION IS BECOMING INCREASINGLY IMPORTANT TO CONSUMERS



# INTEREST IN DIGITAL HEALTH & WELLNESS HAS GROWN SIGNIFICANTLY WITH STRONG GROWTH PROJECTIONS GLOBALLY



KEARNEY

## MEDIA COVERAGE OF DIGITAL HEALTHCARE & WELLNESS

**Harvard  
Business  
Review**



**The  
Economist**

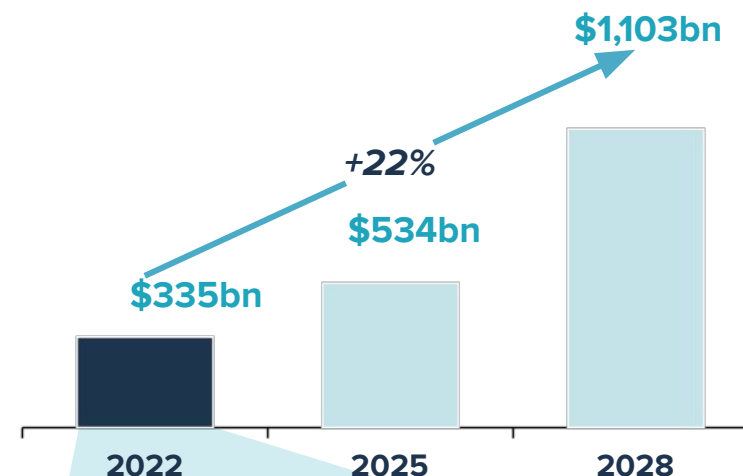
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**THE WALL STREET JOURNAL**

## DIGITAL HEALTH & WELLNESS MARKET

Market Size (Revenue)



REGION	MARKET SIZE	CAGR <sup>1</sup>
Europe	\$65.8bn	24.6%
Asia Pacific	\$150.6bn	18.6%
North America	\$91.7bn	26.4%
Latin America	\$15.8bn	16.6%
Middle East & Africa	\$11.0bn	14.0%

1. Compound Annual Growth Rate

Source: Arizton Market report, [BBC](#), [The Economist](#), [HBR](#), [WSJ](#), Kearney

## LEVERAGING TECHNOLOGY FOR PREVENTION WILL RADICALLY TRANSFORM HEALTHCARE AND WELLBEING

### DIGITAL HEALTH & WELLNESS SOLUTIONS



**Evidence-based therapeutic interventions** driven by software to **prevent, manage or treat** medical disorder or disease.



**Patient-facing software** applications that help patients **prevent, manage or treat** a disease with a proven clinical benefit.



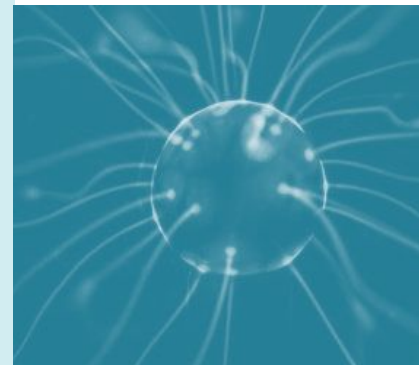
**Telemedicine and virtual care** to provide episodic and **accessible support and/or treatment** for patients.



**Virtual mental health solutions** to increase **accessibility and reduce stigma** around mental health and related conditions.



**Wellness-focused solutions** to improve **overall wellbeing** based on digital technology.



# 93%

of doctors believe health-related apps have the potential to improve overall health



# 2x

increase in likelihood of patients taking medication as prescribed using an app



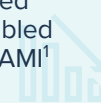
# 24/7

potential availability of doctors across the globe



# 40%

reduction in 12-month mortality rate achieved through digitally enabled managed care after AMI<sup>1</sup>



# 50-60%

increase in smoking cessation rates supported by technology solutions



1. AMI: Acute Myocardial Infarction

Source: [EU Commission](#), Bank of America Securities, [National Institute for Health and Care Research](#), Kearney

## BENEFITS OF INVESTING IN DIGITAL PREVENTATIVE HEALTH

INVESTING IN PREVENTATIVE HEALTH AND SELF-CARE CAN DRIVE GROWTH, BUILD BRAND EQUITY AND IMPROVE THE CORPORATE ESG PROFILE KEARNEY

For examples, please refer to the [Unilever](#) and [Walmart](#) case studies in the Appendix.

	Development of <b>new</b> Preventative Health offerings	Enhancement of <b>current</b> Preventative Health offerings
 <b>Financial</b>	<ul style="list-style-type: none"> <li>▶ <b>Build a new revenue stream</b></li> <li>▶ <b>Diversify product/service portfolio</b> by tapping into the fast-growing health and well-being sector</li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>Grow revenue stream</b> as health and wellness becomes a priority for many</li> <li>▶ <b>Achieve economies of scale</b> with growing offering</li> </ul>
 <b>Brand Positioning</b>	<ul style="list-style-type: none"> <li>▶ <b>Build brand equity</b> through positioning as a purpose-driven and community-conscious brand</li> <li>▶ <b>Enhance brand visibility</b> and recognition</li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>Enhance corporate mission and purpose</b> to enable healthier lives and outcomes</li> <li>▶ <b>Double down on superior brand differentiation</b></li> </ul>
 <b>ESG &amp; Sustainability</b>	<ul style="list-style-type: none"> <li>▶ <b>Demonstrate action on ESG</b> agenda and related goals</li> <li>▶ <b>Drive social impact</b> by promoting a healthy lifestyle and ensuring the overall well-being of society</li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>Drive towards attaining ESG goals</b> through Preventative Health offerings</li> <li>▶ <b>Promote and communicate</b> actions, milestones and successes across key stakeholder groups</li> </ul>

Source: Kearney

"At Haleon, we are committed to empowering millions of people a year to be more included in opportunities for better everyday health – empowering people with the knowledge, tools and resources to fully participate in their own health."



Sarah McDonald,  
Vice President of  
Sustainability

**HALEON**

## OVERVIEW OF TOOLKITS

1

### How to scope digital Preventative Health pilots

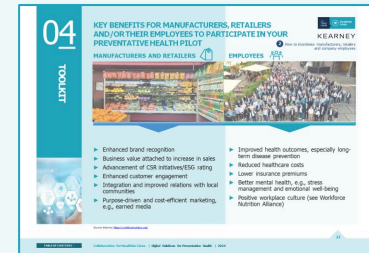
- ▶ Guiding framework to navigate design process
- ▶ Relevant health issues
- ▶ Select technology solutions
- ▶ Use cases to illustrate best practices



2

### How to incentivise manufacturers, retailers and company employees

- ▶ Benefits for manufacturers, retailers and their employees to drive and participate in preventative health initiatives



3

### How to scale for impact

- ▶ Collaborative approaches to scale
- ▶ Accessibility of technology solutions



Source: Kearney



## THE GUIDING FRAMEWORK

### 1 How to scope digital Preventative Health pilots

Follow the outlined steps to scope your business's digital Preventative Health pilot

#### SAMPLE

1. Ensure business alignment with brands and product categories based on identified relevant health issue.
2. Identify a customer journey stage to activate technology solution.
3. Consider partnering or building technology solutions in-house based on ease of implementation and feasibility.



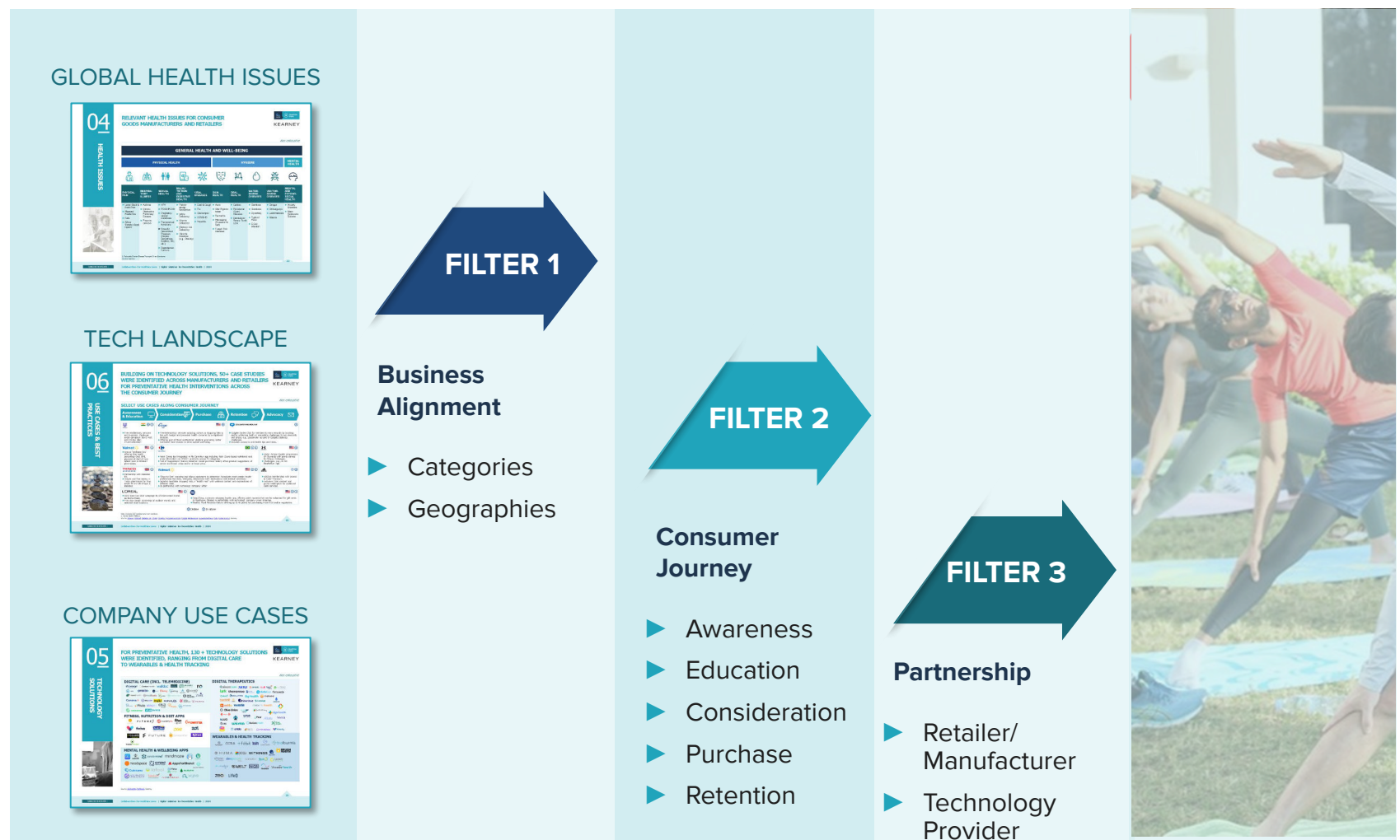
Source: Kearney



# GET STARTED: USE THE GUIDING FRAMEWORK TO NAVIGATE RELEVANT HEALTH ISSUES AND TECHNOLOGY SOLUTIONS

## 1 How to scope digital Preventative Health pilots

*Non-exhaustive*



Source: Kearney

## IDENTIFYING RELEVANT HEALTH ISSUES

- ▶ Health issues were prioritised based on the global member base of CGF in terms of market presence and revenue (i.e., reach) and potential health impact (i.e., health equity). The list of countries identified are:
  - ▶ India
  - ▶ Mexico
  - ▶ Brazil
  - ▶ China
  - ▶ USA
- ▶ Due to the technical terminology of health issues, they were further categorised and adjusted for consumer relevance. The three resulting categories are:
  - ▶ Physical health, e.g. physical pain, respiratory illness, viral diseases
  - ▶ Hygiene, e.g. oral health, skin health, water-borne diseases
  - ▶ Mental health, e.g. well-being, depression, anxiety
- ▶ The map supports manufacturers and retailers that are building Preventative Health interventions by identifying and navigating relevant health issues based on their business model

Source: Kearney

### SAMPLE

### 1 How to scope digital Preventative Health pilots

04

HEALTH ISSUES

RELEVANT HEALTH ISSUES FOR CONSUMER  
GOODS MANUFACTURERS AND RETAILERS

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Non-exhaustive

GENERAL HEALTH AND WELL-BEING

PHYSICAL HEALTH

HYGIENE

MENTAL HEALTH

PHYSICAL PAIN	RESPIRATORY ILLNESS	SEXUAL HEALTH	MALNUTRITION AND DIGESTIVE HEALTH	VIRAL DISEASES	SKIN HEALTH	ORAL HEALTH	WATER-BORNE DISEASES	VECTOR-BORNE DISEASES	MENTAL AND PSYCHO-SOCIAL HEALTH
<ul style="list-style-type: none"> <li>Lower Back &amp; Neck Pain</li> <li>Migraine/Headaches</li> <li>Falls</li> <li>Maternal/Vaginal Injuries</li> </ul>	<ul style="list-style-type: none"> <li>Asthma</li> <li>Chronic Obstructive Pulmonary Disease</li> <li>Pneumonia</li> <li>Pharyngitis</li> </ul>	<ul style="list-style-type: none"> <li>HPV</li> <li>PCOD/PCOS</li> <li>Pregnancy-related Conditions</li> <li>Sexually Transmitted Diseases (Syphilis, Gonorrhea, etc.)</li> <li>Reproductive Cancers</li> </ul>	<ul style="list-style-type: none"> <li>Protein-Energy Malnutrition</li> <li>Iodine Deficiency</li> <li>Vitamin Deficiency</li> <li>(Dietary) Iron Deficiency</li> <li>Lifestyle Diseases (e.g., Obesity)</li> <li>Neurodegenerative Diseases</li> </ul>	<ul style="list-style-type: none"> <li>Cold &amp; Cough</li> <li>Flu</li> <li>Chikungunya</li> <li>COVID-19</li> <li>Hepatitis</li> </ul>	<ul style="list-style-type: none"> <li>Acne</li> <li>Skin Pigmentation</li> <li>Dandruff</li> <li>Photodamage (Exposure to Sun)</li> <li>Fungal Skin Diseases</li> </ul>	<ul style="list-style-type: none"> <li>Cavities</li> <li>Periodontal (Gum) Diseases</li> <li>Edentulous/Severe Tooth Loss</li> </ul>	<ul style="list-style-type: none"> <li>Dysentery</li> <li>Typhoid Fever</li> <li>E Coli Infection</li> </ul>	<ul style="list-style-type: none"> <li>Dengue</li> <li>Chikungunya</li> <li>Leishmaniasis</li> <li>Malaria</li> </ul>	<ul style="list-style-type: none"> <li>Anxiety Disorders</li> <li>Major Depressive Disorder</li> </ul>

1. Polycystic Ovarian Disease/Polycystic Ovary Syndrome.  
Source: Kearney.

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04

HEALTH ISSUES

HEALTH ISSUES IDENTIFIED AND IN ALIGNMENT WITH CGF  
MEMBERS' BUSINESS MODELS

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	MANUFACTURER					RETAILER			
	ORAL CARE	SKIN CARE	PERSONAL & HOME CARE	FEMININE CARE	CONSUMER HEALTH	FOOD	NON-FOOD		
Physical health									
Hygiene									
Mental health									
Diabetes									
Lower Back & Neck Pain									
Periodontal Disease									
PCOD/PCOS									
Nutritional Deficiencies									
Digestive Diseases									
Sexually Transmitted Diseases									
Tropical Diseases (e.g., Dengue)									
Obesity									
Periodontal Disease									
Acne									
Skin Pigmentation									
Oral Issues (e.g., Cavities)									
Cold, Cough & Flu									
Dandruff									
Photodamage (i.e., Sun Exposure)									
Fungal Skin Diseases									
Migraine/Headache									

1. Polycystic Ovarian Disease/Polycystic Ovary Syndrome. 2. Food poisoning, traveler's diarrhea, etc. 3. Other Consumer Health categories include Dermatological, Digestive Disorders, Emergency Contraception, Weight Management, etc. Source: Kearney.

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Further information in Appendix

## SELECTING RELEVANT TECHNOLOGY SOLUTIONS

- In total, **130+** relevant technology solutions were identified and categorised into five clusters<sup>1</sup>:

- Digital Care (incl. Telemedicine)
- Digital Therapeutics
- Fitness, Nutrition & Diet Apps
- Mental Health & Well-Being Apps
- Wearables & Health Tracking

- Given the varying complexity of the identified technology solutions, an assessment of the ease of implementation and cost implication helps in finding and selecting the relevant solution for Preventative Health interventions.

- To identify relevant tech solutions, refer to the map in the annex (add hyperlink) that illustrates the clusters of tech solutions found for the various health issues.

"We have an opportunity to provide quality and impartial information to nudge our customers towards healthier choices and behaviours."



Ida Aagenaes,  
Global Sustainability  
Manager



1. Digital Care and Digital Therapeutics were separated to highlight the chronic disease management and treatment aspect of Therapeutics while Digital Care focuses on telemedicine and RPM

Source: Kearney

### SAMPLE

#### 1 How to scope digital Preventative Health pilots

**05 TECHNOLOGY SOLUTIONS**

**FOR PREVENTATIVE HEALTH, 130+ TECHNOLOGY SOLUTIONS WERE IDENTIFIED, RANGING FROM DIGITAL CARE TO WEARABLES & HEALTH TRACKING**

Non-exhaustive

KEARNEY

Source: @Zainab, @Helen, @Kearney

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**05 TECHNOLOGY SOLUTIONS**

**HEALTH ISSUES IDENTIFIED AND IN ALIGNMENT WITH RELEVANT TECHNOLOGY SOLUTIONS**

Non-Exhaustive

KEARNEY

Increasing importance as complementary solution for chronic disease patients

**UNDERLYING**

- Software solutions to help track symptoms.
- Image recognition to support diagnosis.
- Data analytics to generate insights based on monitoring and analysis of real-time data from medical devices and wearables.

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Further information in Appendix



## CASE STUDIES AND KEY TAKEAWAYS

- ▶ To maximise commercial impact, technology solutions can be deployed at various stages of the customer journey, encompassing:
  - ▶ Awareness & Education
  - ▶ Consideration
  - ▶ Purchase
  - ▶ Retention
  - ▶ Advocacy
- ▶ When designing best-in-class pilots, consider these six actions:
  1. Focus on general health issues;
  2. Ensure business alignment;
  3. Engage various touchpoints, including both digital and physical channels;
  4. Drive impact through partnerships;
  5. Integrate interactive tech solutions;
  6. Develop meaningful incentives.

A selection of Preventative Health Case Studies along the customer journey illustrates the diversity and complexity of potential solutions for manufacturers and retailers around the world.

Source: Kearney

### SAMPLE

### 1 How to scope digital Preventative Health pilots

**06 USE CASES & BEST PRACTICES**

#### BUILDING ON TECHNOLOGY SOLUTIONS, 50+ CASE STUDIES WERE IDENTIFIED ACROSS MANUFACTURERS AND RETAILERS FOR PREVENTATIVE HEALTH INTERVENTIONS ACROSS THE CONSUMER JOURNEY

KEARNEY

Non exhaustive

**SELECT USE CASES ALONG CONSUMER JOURNEY**

Awareness & Education	Consideration	Purchase	Retention	Advocacy
<b>Kruger</b> Free telephony services and response, developed under campaign 'Don't wait until it's too late. #TalkToYourDoctor'. <b>Walmart</b> Annual 'Wellness Day' offering free health screenings (free BMI, glucose, or start of new blood test) on Walmart pharmacies. <b>TESCO</b> Partnership with Diabetes UK. <b>L'OREAL</b> 2021 'Save Our Skin' campaign by L'Oréal-owned brand La Roche-Posay. Free skin cancer screenings at outdoor events and selected retail locations.	<b>Kruger</b> Free telephony services including advice on shopping lists in line with budget and prevalent health concerns to a registered dietitian. <b>Walmart</b> Smart Choice tool integrated in My Walmart app including Scan Score-based nutritional and price information on 60,000+ products across 76 categories. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions. <b>TESCO</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions. <b>L'OREAL</b> 2021 'Save Our Skin' campaign by L'Oréal-owned brand La Roche-Posay. Free skin cancer screenings at outdoor events and selected retail locations.	<b>Colgate Palmolive</b> Colgate Smile Club for members to earn rewards by brushing and/or whitening teeth or completing challenges to win discounts and prizes, e.g., glucometer as part of Colgate Diabetes challenges. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions.	<b>Colgate Palmolive</b> Colgate Smile Club for members to earn rewards by brushing and/or whitening teeth or completing challenges to win discounts and prizes, e.g., glucometer as part of Colgate Diabetes challenges. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions.	<b>Colgate Palmolive</b> Colgate Smile Club for members to earn rewards by brushing and/or whitening teeth or completing challenges to win discounts and prizes, e.g., glucometer as part of Colgate Diabetes challenges. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions. <b>Walmart</b> 'Shop-by-Goal' scanning tool allows customers to determine if products meet certain health preferences like diets, allergies, interactions with medications and medical conditions.

Legend: Online | In-store

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**06 USE CASES & BEST PRACTICES**

#### AS WATSON CREATES GLOBAL HEALTH CAMPAIGN TO PROMOTE HOLISTIC WELLBEING

KEARNEY

Illustrative

Mental health is often undermined in holistic well-being. Since 2017, AS Watson has been committed to raise the awareness around both physical and mental well-being with its global campaign.

**GLOBAL HEALTH CAMPAIGN**

AS Watson's research reveals that in order to lead a healthier lifestyle, over 80% of the respondents believe that enough sleep, healthy diet and regular exercise can keep them healthy, but 40% of them fail to achieve this. Customers need behavioural nudges to encourage them to live healthier lifestyles.

Health should be accessible to all and it starts from an active lifestyle, of which, supplier collaboration is an important element in this."

Hanks Lee  
Corporate Communications Director, AS Watson

**PROGRAMME OFFERING**

- Platform for suppliers to work with Watsons, reaching more customers via health professionals from Watsons.
- Health screening service for rural elderly where healthcare services are less accessible, served over 4,000 elderly.
- AI Programme to encourage customers to smile more, over 1.8m smile index achieved.

**Research-based Health Campaign**

A Global Health Survey was conducted and revealed that the happier a market is, the healthier it will be.

- Short questionnaire about correlation between smile and health
- Ranking of healthiest and happiest countries in the world
- Motivate over 20,000 customers to exercise more with GetActive activities across Asia

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Further information in Appendix





## SIX SUCCESS FACTORS TO HELP DESIGN BEST-IN-CLASS PILOTS FOR DIGITAL PREVENTATIVE HEALTH INITIATIVES

### 1 How to scope digital Preventative Health pilots

#### KEY SUCCESS FACTORS

##### Activation across Multiple Touchpoints, i.e., Digital and Physical

- ▶ Omnichannel approach to drive accessibility and scale
- ▶ In-store demonstration to bring programme to life

##### Partnerships

- ▶ Combined forces and partnerships for scale, e.g., manufacturers and retailers
- ▶ Shared objective and clear responsibilities among partners

##### Incentivisation

- ▶ Coupling with rewards to increase impact and life of programme
- ▶ Accessibility of initiative to drive incentivised impact

##### Business Alignment

- ▶ Alignment with brand (i.e., brand story, values, purpose, etc.)
- ▶ Direct connect to product offering and assortment strategy

##### Interactive Tech Solution

- ▶ Easy and seamless connection to (local) consumers leveraging technology
- ▶ Gamification to drive impact

##### Focus on General Health Issues

- ▶ Connect between health issue and business model (incl. product categories)
- ▶ Focus on health issues with relevant expertise, 'right to play'



Source: Kearney

## KEY BENEFITS FOR MANUFACTURERS, RETAILERS AND/OR THEIR EMPLOYEES TO PARTICIPATE IN YOUR PREVENTATIVE HEALTH PILOT

### MANUFACTURERS AND RETAILERS



### EMPLOYEES



- ▶ Enhanced brand recognition
- ▶ Business value attached to increase in sales
- ▶ Advancement of CSR initiatives/ESG rating
- ▶ Enhanced customer engagement
- ▶ Integration and improved relations with local communities
- ▶ Purpose-driven and cost-efficient marketing, e.g., earned media

- ▶ Improved health outcomes, especially long-term disease prevention
- ▶ Reduced healthcare costs
- ▶ Lower insurance premiums
- ▶ Better mental health, e.g., stress management and emotional well-being

Source: Kearney

*“Collaboration brings together different areas of expertise and leads to better ideas, solutions and, ultimately, consumer outcomes.”*



Liz Pandya,  
Head of Public Health,  
North America



## SCALE FOR IMPACT ON PREVENTATIVE HEALTH WITH PARTNERS



KEARNEY

3 How to scale for impact

*Non-exhaustive*

### Leverage Collaborative Approaches



- ▶ Different forms of collaboration such as **co-development, co-investment or international partnerships** help in scaling by enabling companies to leverage each other's **strengths, resources** and **networks while reducing financial risks**.

### Allow Room for Adaptation



- ▶ While select Preventative Health interventions might be **applicable to multiple consumer groups across countries or regions**, relevant solutions should be adapted for the **cultural context** and **level of technology advancement** in the local market.

### Develop Shared Infrastructure and Platforms



- ▶ Select (technology) solutions require consumers to access the same, or similar, information on an ongoing basis so that creating a **single shared platform, system**, or infrastructure to **support activities across consumer groups** can both reduce costs and drive consistency.

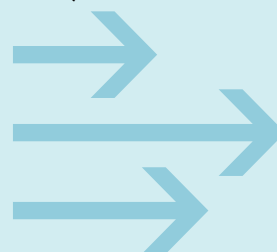
Source: Kearney



## CHECKLIST TO CONSIDER BEFORE YOU START THE JOURNEY AND DURING IMPLEMENTATION

### BEFORE YOU START

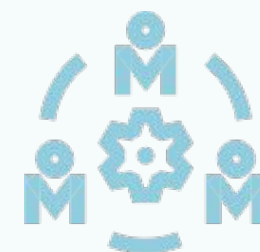
- ☐ Outline scope and objectives of the initiative
- ☐ Identify a project owner (entity), project management team and key stakeholders and agree on roles and responsibilities
- ☐ Determine the resources required for set-up (e.g., budget, IT, training)
- ☐ Decide on an implementation delivery strategy (i.e., outsourcing vs. in-house) and partner management strategy
- ☐ Draft a high-level plan (i.e., list of activities, activity owner, schedule/timeline)



Source: Kearney

### DURING IMPLEMENTATION

- ☐ Ensure continuous implementation monitoring
- ☐ Define and activate an effective marketing plan
- ☐ Ensure continuous stakeholder engagement
- ☐ Measure impact through tools including pulse surveys, supported by pilot champions
- ☐ Develop revisions (if necessary)



## ABOUT THE CONSUMER GOODS FORUM

The Consumer Goods Forum (CGF) is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serve the consumer goods industry worldwide.

It brings together the CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format. Its member companies have combined sales of EUR 4.6 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 55 manufacturer and retailer CEOs.

For more information, please visit:  
**[theconsumergoodsforum.com](https://theconsumergoodsforum.com)**



## ABOUT KEARNEY

Kearney is a leading global management consulting firm with more than 5,700 people working in more than 40 countries. We work with more than three-quarters of the Fortune Global 500, as well as with the most influential governmental and non-profit organisations.

Kearney is a partner-owned firm with a distinctive, collegial culture that transcends organisational and geographic boundaries—and it shows. Regardless of location or rank, our consultants are down to earth, approachable, and have a shared passion for doing innovative client work that provides clear benefits to the organisations we work with in both the short and long term.

For more information, please visit:  
**[www.kearney.com](https://www.kearney.com)**

# KEARNEY

[theconsumergoodsforum.com](http://theconsumergoodsforum.com)



## APPENDIX

## APPENDIX

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SUSTAINABILITY  
IMPACT

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EMPOWERING CONSUMERS

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GOOD FOR PEOPLE &  
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CASE STUDIES & KEY  
TAKEAWAYS

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## HEALTH EQUITY IS CRUCIAL TO ACHIEVING THE INTERNATIONAL SUSTAINABLE DEVELOPMENT GOALS

### EXAMPLE TARGETS BY 2030



Achieve **universal health coverage** including financial risk protection, access to quality essential healthcare services and access to safe, effective, quality and affordable essential medicines and vaccines for all.



Strengthen the **prevention and treatment of substance abuse** including narcotic drug abuse and harmful use of alcohol.



Strengthen the **capacity of all countries, in particular developing countries**, for **early warning, risk reduction** and management of national and global health risks.



Ensure **universal access to sexual and reproductive healthcare** services including for family planning, information and education and the integration of reproductive health into national strategies and programmes.

Source: [UN](#)

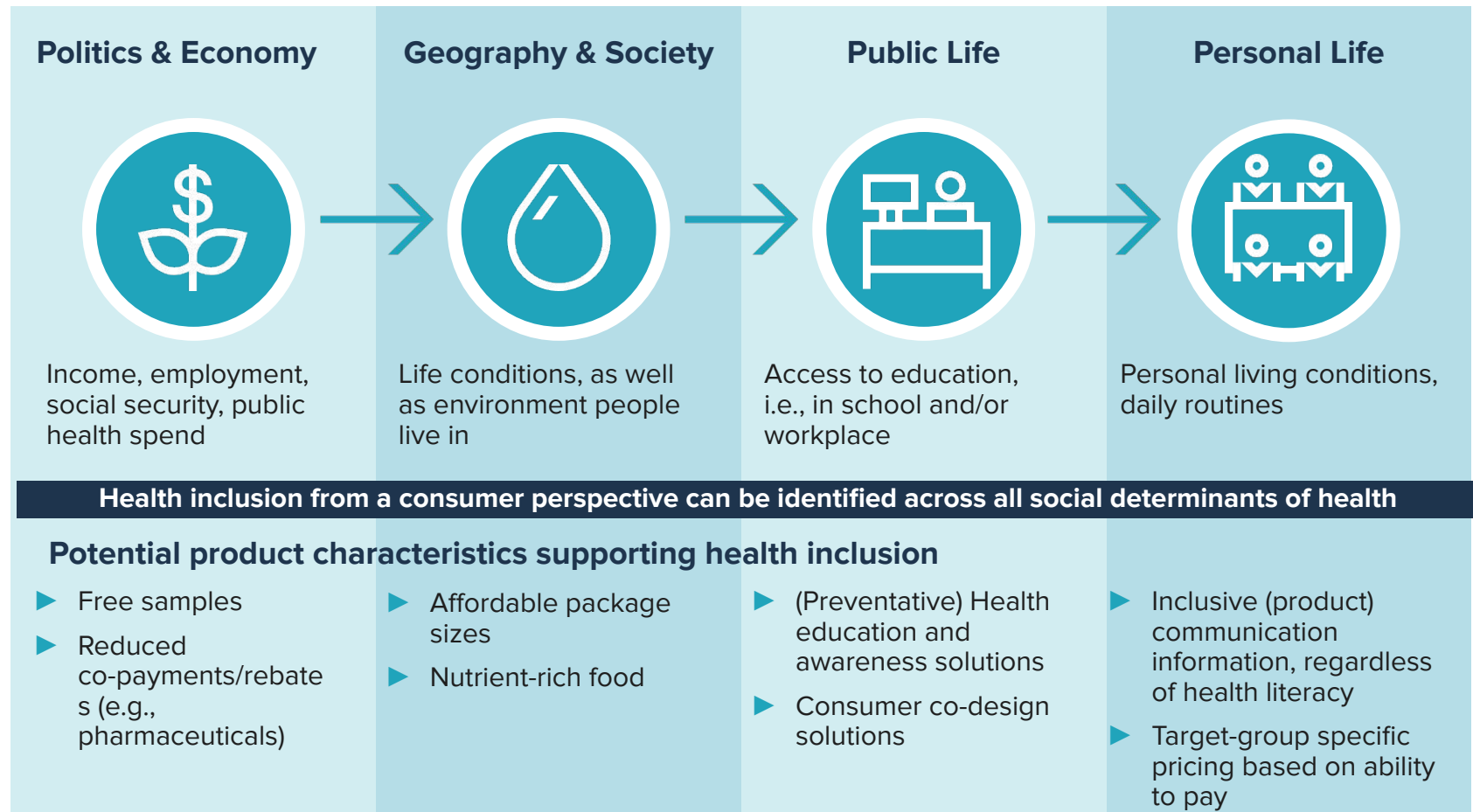
### SDG #3 GOOD HEALTH AND WELLBEING



## HEALTH EQUITY IS ACHIEVED WHEN EVERYONE CAN ATTAIN THEIR FULL POTENTIAL FOR HEALTH AND WELLBEING

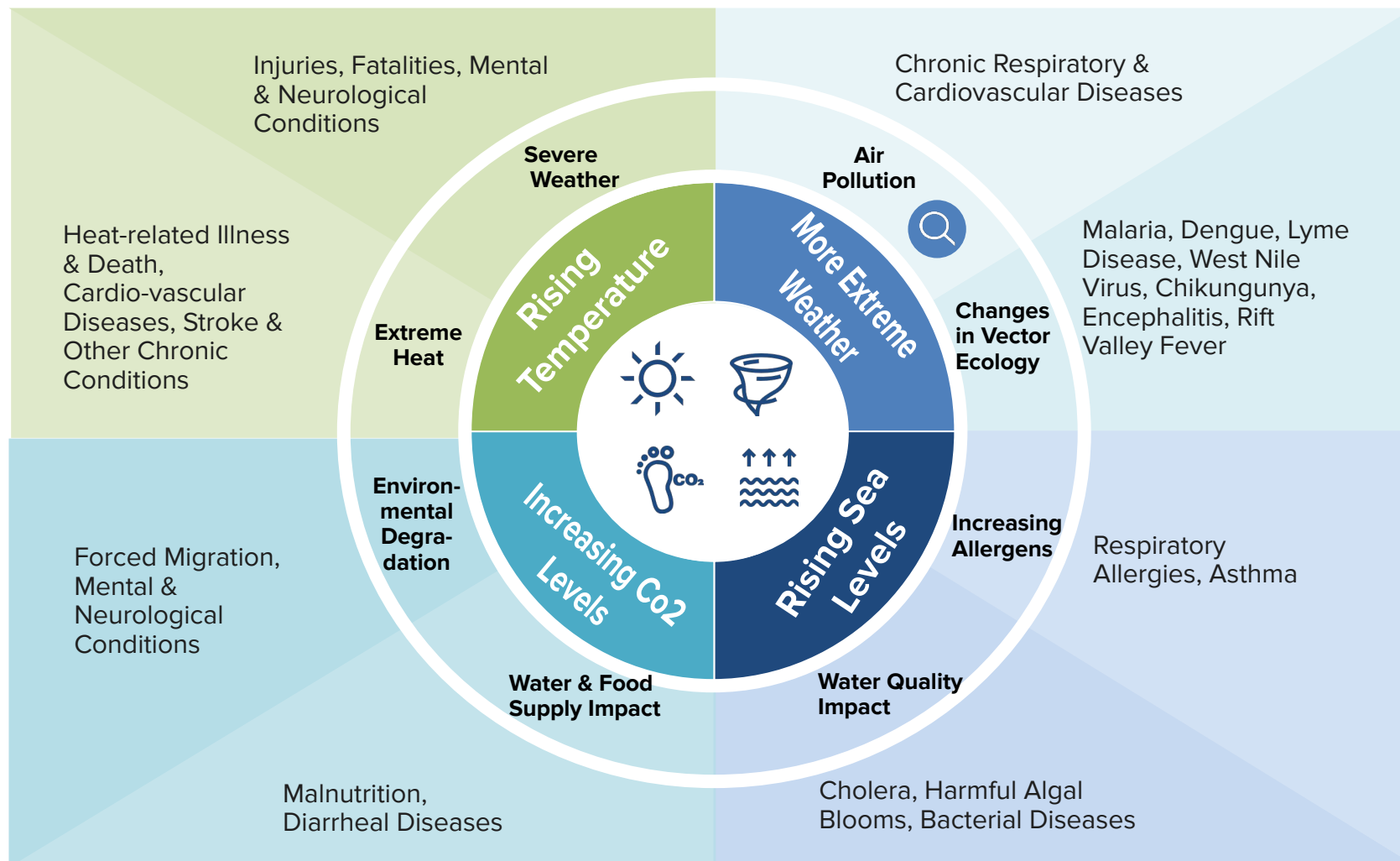
Health and health equity are determined by the conditions in which people are born, grow, live, work, play and age, as well as biological determinants.

### ACTION AREAS FOR YOUR BUSINESS'S PREVENTATIVE HEALTH JOURNEY



Source: [WHO](#), Kearney

# CLIMATE CHANGE PRESENTS A FUNDAMENTAL THREAT TO HUMAN HEALTH – IT AFFECTS THE PHYSICAL ENVIRONMENT AS WELL AS ASPECTS OF NATURAL AND HUMAN SYSTEMS



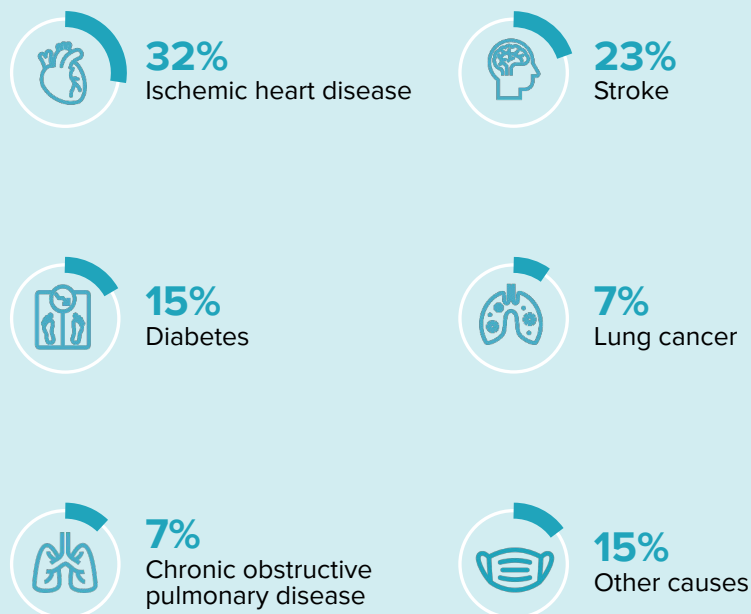
Source: [CDC](#), Kearney



## AIR POLLUTION: THE SILENT KILLER

Claiming 7 million lives each year, air pollution is now considered to be the world's largest environmental health threat. It contributes to and intensifies various ailments, spanning from asthma and cancer to pulmonary illnesses and heart disease.

### DEATHS IN THE EU ATTRIBUTABLE TO POLLUTION FROM FINE PARTICULATE MATTER (PM2.5) – BREAKDOWN BY CAUSE (2021)



Note 1: For asthma: deaths in children under 15 for PM2.5. For all other causes: deaths in adults aged 25 or older. Fewer than 10 deaths from asthma attributed to PM2.5, not visible

Source: [EEA](#), [WHO](#), [Lancet Planetary Health](#), [World Bank](#), Kearney

~**99%** of global population **breathe air that exceeds WHO air quality limits** and threatens their health



Every year, **exposure to air pollution** is estimated to cause **7 million premature deaths**



~**0.001%** of the world's population **breathe in air** that is considered **acceptable**



**Household air pollution** was responsible for an estimated **3.2 million deaths per year** in 2020



**South Asia** is home to **9** of the world's **10 cities** with the **worst air pollution**



**253,000 deaths** in the **EU** in 2021 were attributable to **fine particulate matter (PM2.5)**



# UNILEVER'S US HEALTH & WELL-BEING IS A PORTFOLIO OF SEVEN FAST-GROWING BRANDS POSITIONED AT THE CONVERGENCE OF SCIENTIFIC CREDIBILITY, PERSONALISATION AND TRANSPARENCY



KEARNEY

## UNILEVER HEALTH & WELLBEING

Built with a **strategic M&A<sup>1</sup> approach**, the portfolio is made up of **future-fit brands** that leverage the industry movement **from pharmaceutical focused to lifestyle-led, science backed** brands with devoted communities.



## BRAND PORTFOLIO



### Liquid I.V.

No.1 powdered hydration brand in the US

### Nutrafol

NUTRAFOL No.1 dermatologist-recommended hair growth supplement brand in the US



### OLLY

No. 1 gummy vitamin brand in the US



### Onnit

An authority on nootropics/brain supplements in the US



### SmartyPants Vitamins

No.1 gummy multivitamin brand on Amazon and in the Natural channel



### Welly

Disruptor in first-aid category with flex fabric bandages



### Equilibra

Italian wellness brand specialising in natural ingredients

# €12bn

global



# 10.2%

financial growth in Q1 2023



# 50%+

like-for-like growth p.a. since 2019



# 9<sup>th</sup>

consecutive quarter of double-digit volume led growth



*"The market has rallied back and it's showing strong growth. It has sustained because people's interest in their health and in seeking out solutions that support their health goals has just increased."*



Jostein Solheim, CEO Health & Wellbeing

Notes: 1. Mergers and Acquisitions,  
Source: [Unilever](#), Kearney

## WALMART IS RAPIDLY EXPANDING ITS PRESENCE IN HEALTHCARE

### WALMART HEALTH & WELLNESS

Focused on **improving cost and convenience of healthcare** by offering **over-the-counter medications** and a variety of **low-cost, healthy grocery foods**.

### SELECTION OF KEY INITIATIVES



**Health & Wellness Assortment Expansion**  
(esp. Feminine Care, Sexual Health)



**Digital Product Distribution in Collaboration with Digital Health Startups**  
e.g., Digital Diabetes Management System



**Digital Services**  
e.g., Shop-by-Diet scanning tool



**Dental and Hearing Services**



**X-ray and Diagnostics Services**



**Counselling Services**



**Medical Clinics (Primary & Urgent Care) and Labs**

1. Health & Wellness includes pharmacy, over-the-counter drugs and other medical products, optical services and other clinical services, 2. Other Categories in Walmart US business include in-house advertising offering via Walmart Connect, supply chain and fulfillment capabilities to online marketplace sellers via Walmart Fulfillment Services, and newer initiatives such as B2B last mile delivery services via Walmart GoLocal, suite of data products for merchants and suppliers via Walmart Luminate, and 3. Compound Annual Growth Rate  
Source: [Walmart Annual report](#), Kearney



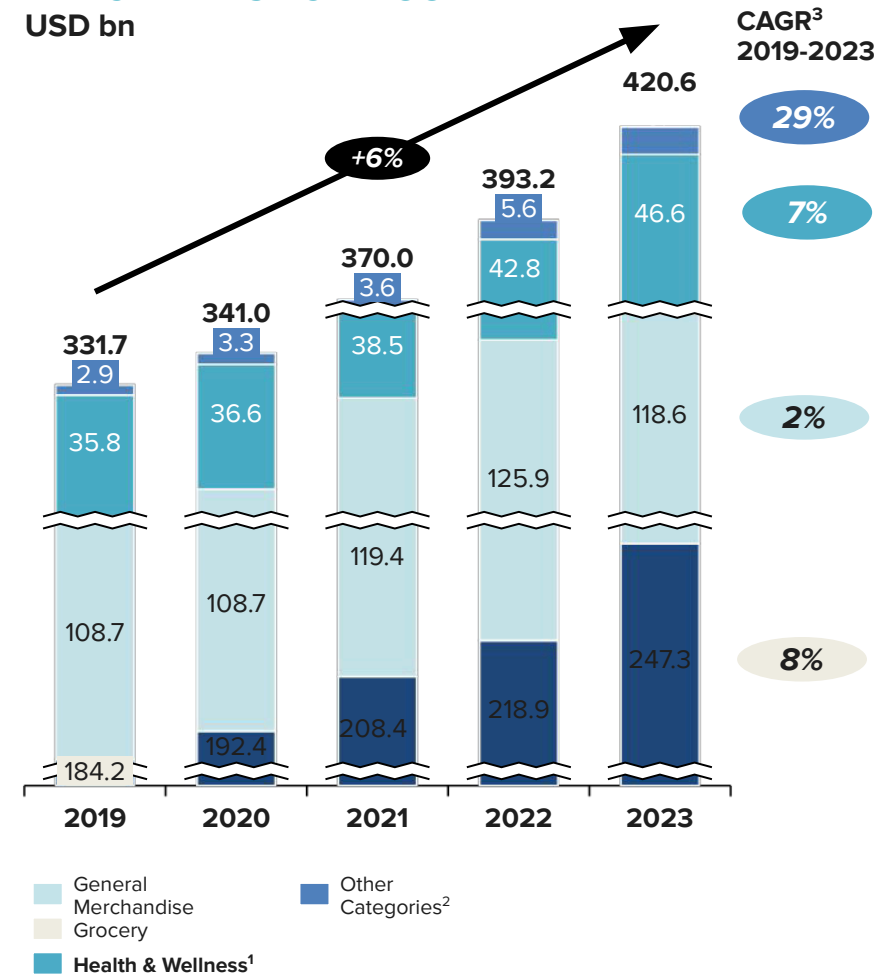
KEARNEY  
**Walmart**

Retailer

Food & Non-Food

### WALMART US NET SALES BY MERCHANDISE CATEGORY<sup>1</sup>

USD bn



## RELEVANT HEALTH ISSUES FOR CONSUMER GOODS MANUFACTURERS AND RETAILERS

Non-exhaustive

### GENERAL HEALTH AND WELL-BEING

#### PHYSICAL HEALTH

#### HYGIENE

#### MENTAL HEALTH



PHYSICAL PAIN	RESPIRATORY ILLNESS	SEXUAL HEALTH	MALNUTRITION & DIGESTIVE HEALTH	VIRAL DISEASES	SKIN HEALTH	ORAL HEALTH	WATER-BORNE DISEASES	VECTOR-BORNE DISEASES	MENTAL & PSYCHO-SOCIAL HEALTH
<ul style="list-style-type: none"> <li>▶ Lower Back &amp; Neck Pain</li> <li>▶ Migraine/Headaches</li> <li>▶ Falls (Motor Vehicle) Road Injuries</li> </ul>	<ul style="list-style-type: none"> <li>▶ Asthma</li> <li>▶ Chronic Obstructive Pulmonary Disease</li> <li>▶ Pneumo-coniosis</li> </ul>	<ul style="list-style-type: none"> <li>▶ HPV</li> <li>▶ PCOD/PCOS<sup>1</sup></li> <li>▶ Pregnancy-related Conditions</li> <li>▶ Premenstrual Syndrome</li> <li>▶ Sexually Transmitted Diseases (Herpes, Gonorrhoea, Syphilis, HIV, etc.)</li> <li>▶ Reproductive Cancers</li> </ul>	<ul style="list-style-type: none"> <li>▶ Protein-energy Malnutrition</li> <li>▶ Iodine Deficiency</li> <li>▶ Vitamin Deficiency</li> <li>▶ (Dietary) Iron Deficiency</li> <li>▶ Lifestyle Diseases (e.g., Obesity)</li> </ul>	<ul style="list-style-type: none"> <li>▶ Cold &amp; Cough</li> <li>▶ Flu</li> <li>▶ Chickenpox</li> <li>▶ COVID-19</li> <li>▶ Hepatitis</li> </ul>	<ul style="list-style-type: none"> <li>▶ Acne</li> <li>▶ Skin Pigmentation</li> <li>▶ Dermatitis</li> <li>▶ Photoaging (Exposure to Sun)</li> <li>▶ Fungal Skin Diseases</li> </ul>	<ul style="list-style-type: none"> <li>▶ Cavities</li> <li>▶ Periodontal (Gum) Diseases</li> <li>▶ Edentulism/Severe Tooth Loss</li> </ul>	<ul style="list-style-type: none"> <li>▶ Diarrhoea</li> <li>▶ Giardiasis</li> <li>▶ Dysentery</li> <li>▶ Typhoid Fever</li> <li>▶ E.Coli Infection</li> </ul>	<ul style="list-style-type: none"> <li>▶ Dengue</li> <li>▶ Chikungunya</li> <li>▶ Leishmaniasis</li> <li>▶ Malaria</li> </ul>	<ul style="list-style-type: none"> <li>▶ Anxiety Disorders</li> <li>▶ Major Depressive Disorder</li> </ul>

1. Polycystic Ovarian Disease/Polycystic Ovary Syndrome

Source: Kearney

# 04

## HEALTH ISSUES

### HEALTH ISSUES IDENTIFIED AND IN ALIGNMENT WITH CGF MEMBERS' BUSINESS MODELS



KEARNEY

	MANUFACTURER								RETAILER	
	ORAL CARE	SKIN CARE	PERSONAL & HOME CARE	FEMININE CARE	CONSUMER HEALTH				FOOD	NON-FOOD
					Common Cold Remedies	Pain Relief	Vitamins & Supplements	Others <sup>3</sup>		
Diabetes		✓	✓					✓	✓	
Lower Back & Neck Pain			✓			✓	✓			✓
Premenstrual Syndrome				✓		✓				✓
PCOD/PCOS <sup>1</sup>		✓		✓			✓		✓	
Nutritional Deficiencies	✓						✓		✓	
Digestive Diseases <sup>2</sup>	✓		✓			✓		✓	✓	
Sexually Transmitted Diseases	✓		✓	✓			✓	✓		✓
Tropical Diseases (e.g., Dengue)			✓							✓
Obesity			✓				✓	✓	✓	
Periodontal Disease	✓							✓	✓	✓
Acne		✓						✓		✓
Skin Pigmentation		✓						✓		✓
Oral Issue (e.g., Cavities)	✓						✓		✓	✓
Cold, Cough & Flu					✓	✓				✓
Dermatitis		✓	✓					✓		✓
Photoaging (i.e., Sun Exposure)		✓						✓		✓
Fungal Skin Diseases		✓						✓		✓
Migraine/Headache						✓				✓

1. Polycystic Ovarian Disease/Polycystic Ovary Syndrome, 2. Food poisoning, traveller's diarrhoea, etc., 3. Other Consumer Health categories include Dermatologicals, Digestive Remedies, Emergency Contraception, Weight Management & Wellbeing

Source: Kearney

# FOR PREVENTATIVE HEALTH, 130 + TECHNOLOGY SOLUTIONS WERE IDENTIFIED, RANGING FROM DIGITAL CARE TO WEARABLES & HEALTH TRACKING

Non-exhaustive

## DIGITAL CARE (INCL. TELEMEDICINE)



## FITNESS, NUTRITION & DIET APPS



## MENTAL HEALTH & WELLBEING APPS



## DIGITAL THERAPEUTICS



## WEARABLES & HEALTH TRACKING



Source: CB Insights, Pitchbook, Kearney

## EXAMPLE

### IN DIGITAL CARE, ADA HEALTH MAKES MEDICAL SYMPTOM ASSESSMENT EASY AND ACCESSIBLE

#### ADA'S DIGITAL CARE SYMPTOM ASSESSMENT

Founded in 2016, AI-based symptom assessment offering consumer and enterprise solutions



KEARNEY

*Illustrative*

#### NOTABLE INVESTORS



**13m+**  
users



**31m+**  
symptoms  
assessed

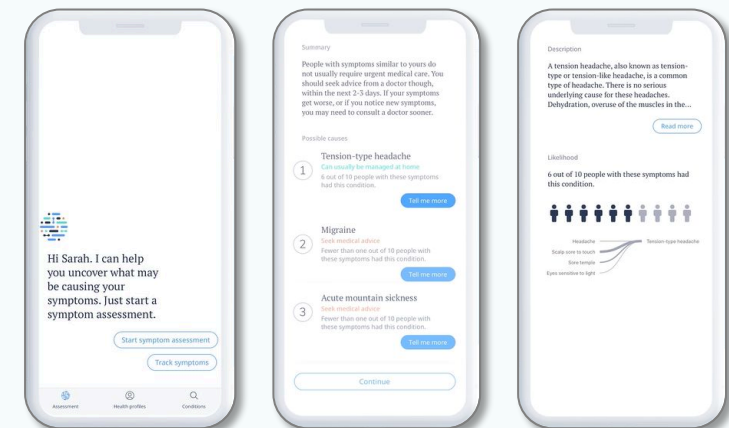


**11**  
languages  
available

#### USER FEEDBACK & EXPERIENCE

*"I was sceptical while downloading it, but I answered Ada's questions honestly, and was given a rather accurate assessment which I took to my specialist, and we're now treating a condition that can be monitored easily."*

Source: [CB Insights](#), [Pitchbook](#), [ada](#), [Kearney](#)





EXAMPLEIN DIGITAL THERAPEUTICS, TECH PLAYERS OFFER  
SOLUTIONS ADDRESSING BOTH PHYSICAL & MENTAL  
HEALTH

## PHYSICAL



Provider of digital healthcare alternatives intended to facilitate the treatment of musculoskeletal pain.



## Technology

Machine Learning (ML)



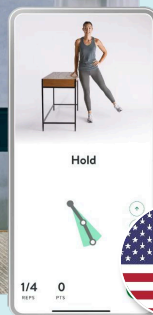
## Health Issue

Musculoskeletal Disorders



## Notable Investors

TIGERGLOBAL



68% average pain reduction in pain per participant



Source: [CB Insights](#), [Pitchbook](#), [Hingehealth](#), [Akili](#), Kearney

## MENTAL



**Clinically-validated, cognitive treatments** for mental health conditions delivered in an action video game interface.



## Technology

Machine Learning (ML)



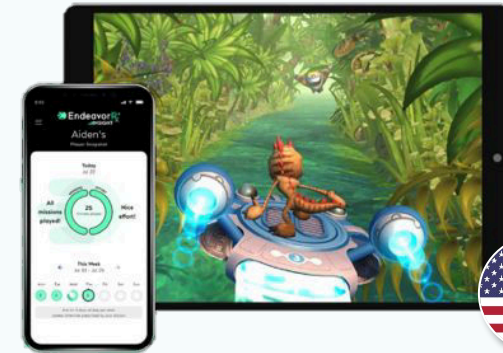
## Health Issue

Attention-deficit/Hyperactivity Disorder (ADHD)



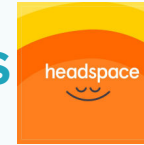
## Milestone

First FDA-authorized Prescription Video Game Treatment (EndeavorRx®)



EXAMPLE

## HEADSPACE, A GLOBAL LEADER IN DIGITAL MENTAL HEALTH SUPPORT, OFFERS MEDITATION &amp; MINDFULNESS TOOLS TO PRIORITISE MENTAL HEALTH



KEARNEY

*Illustrative*ACCESSIBLE MENTAL HEALTH  
SUPPORT WITH HEADSPACE

Science-backed meditation and mindfulness tools offered through flagship app available to consumers and enterprises

## NOTABLE INVESTORS

70m+  
members200  
countries &  
regions with users11  
languages  
available

## USER FEEDBACK &amp; EXPERIENCE



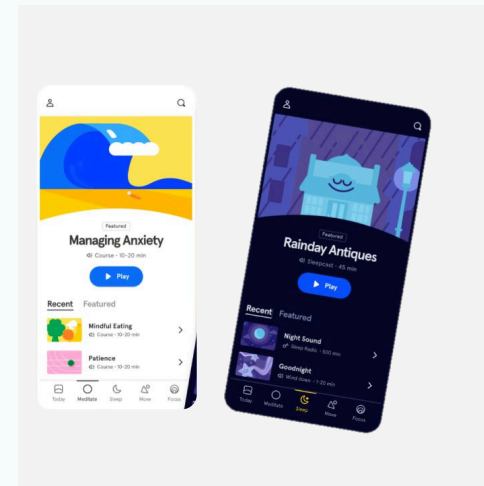
*Headspace provides me with ... a connection to myself, and a disconnection from negative thoughts, feelings and sensations."*

**Keri, UK**  
on finding her happy place



*Andy's guidance helped me to understand the functioning of the mind."*

**Olga, Czech Republic**  
on the positive impact of guided meditations



Source: [CB Insights](#), [Pitchbook](#), [Headspace](#) Kearney

EXAMPLENUTRITION-BASED SOLUTIONS INCORPORATE  
INSIGHTS FROM PSYCHOLOGICAL RESEARCH AND  
PROVIDE SELF-SERVICE TESTING FOR AT-HOME USE

noom

**Psychology-based** digital health platform for  
intelligent **nutrition and exercise coaching**



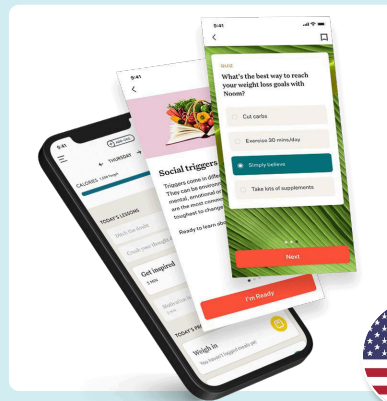
Health Issue

Obesity/High Body Mass Index  
& Related IssuesNotable  
Investors

SILVER LAKE

novo  
holdings

SAMSUNG

SAMSUNG VENTURE  
INVESTMENT

Source: CB Insights, Pitchbook, Noom, Zoe, Kearney

zoe

**Medical testing** service delivering  
recommendations for **personalised**  
**dietary plans** leveraging **at-home kits**

Health  
IssueObesity/High Body Mass Index  
& Gut HealthNotable  
Investors

Balderton.



Zoe analyses your  
**gut microbiome** to  
determine a  
**bespoke** diet plan



**EXAMPLE****LATEST TECHNOLOGY INNOVATIONS IN WEARABLES  
& HEALTH TRACKING INCLUDE BOTH HOLISTIC & TARGETED  
SOLUTIONS****PHYSICAL****OURA**

**Smart ring for holistic health tracking** incl. sleep tracking, heart rate monitoring, activity tracking and illness monitoring



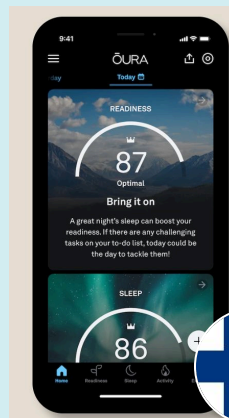
**Technology** Sensors, Machine Learning



**Health Issue** Multiple



**Milestones** 1m+ Rings Sold to Date



86% of Oura Members saw an improvement in their sleep quality

**HYGIENE****BRUSH MONSTER**

**Smart toothbrush for children** with **education and game** elements to make brushing fun and enjoyable



**Technology** Augmented Reality



**Health Issue** Caries, Periodontal Diseases



**Notable Investor** MAYO CLINIC

**MENTAL****ellipsis**  
HEALTH

**Mental health tracking using voice samples** (i.e., vocal biomarker tech), including assessment of **anxiety and depression**



**Technology** Artificial Intelligence



**Health Issue** Anxiety Disorder, Major Depressive Disorder



**Offering** Payer, Provider and Employer Solutions

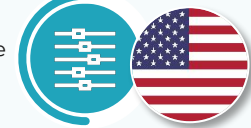
Voice Sample



Deep Learning



Actionable Results

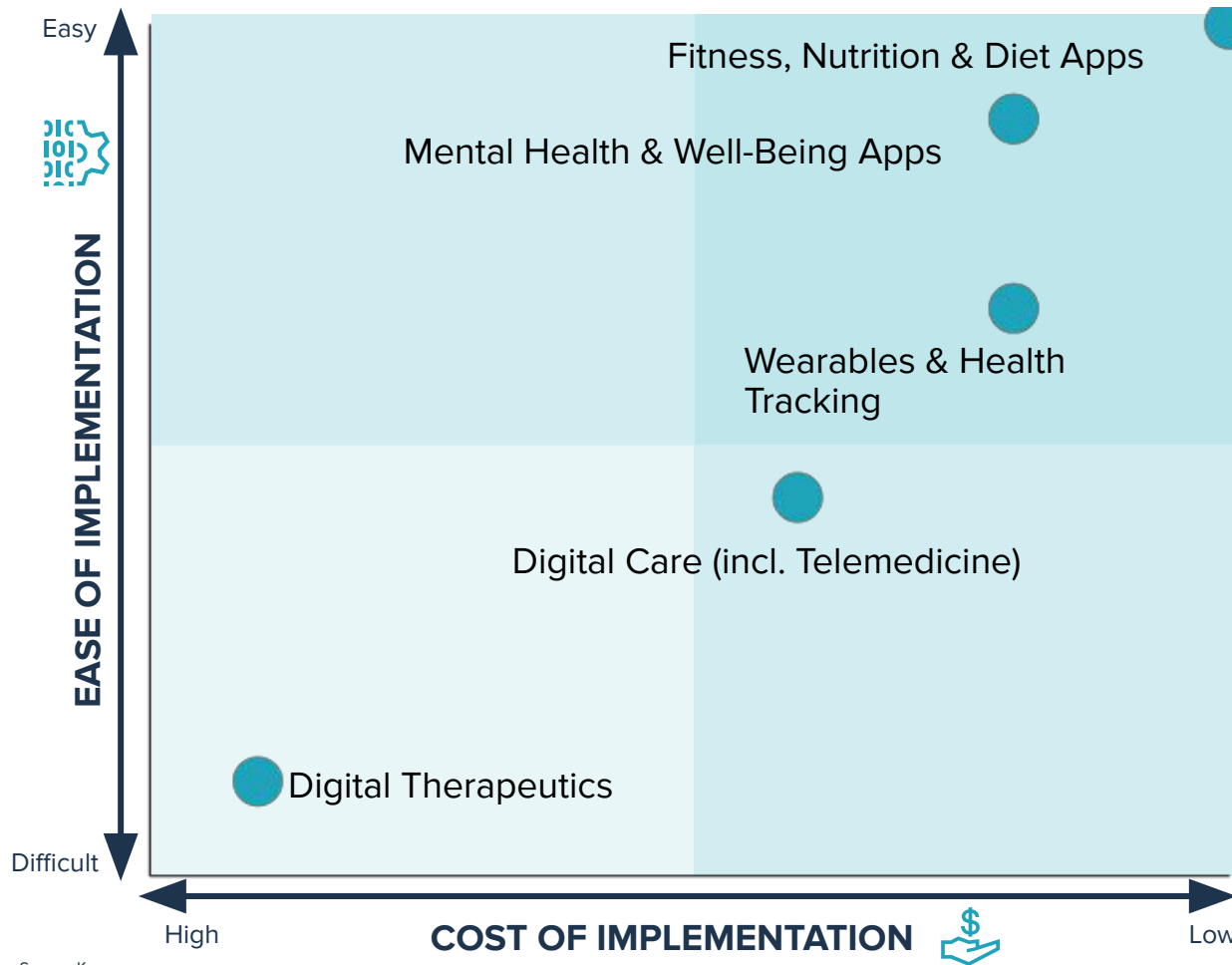


Source: [CB Insights](#), [Pitchbook](#), [Oura](#), [Brush Monster](#), [ellipsis Health](#), Kearney

## EASE OF IMPLEMENTATION AND COSTS ASSOCIATED WITH DIFFERENT TECHNOLOGY SOLUTION CLUSTERS

*Non-exhaustive*

### TECHNOLOGY CLUSTER ASSESSMENT MATRIX



Source: Kearney

#### EASE OF IMPLEMENTATION DEFINED AS ...

...the ability to quickly and easily deploy technology solution to achieve desired results and impact

#### COST OF IMPLEMENTATION DEFINED AS ...

...the costs to develop, roll out and maintain the technology solution

# HEALTH ISSUES IDENTIFIED AND IN ALIGNMENT WITH RELEVANT TECHNOLOGY SOLUTIONS

Non-Exhaustive

Physical Health  
Hygiene  
Mental Health

	DIGITAL CARE <sup>1</sup>	DIGITAL THERAPEUTICS <sup>1</sup>	WEARABLES & HEALTH TRACKING	FITNESS, NUTRITION & DIET APPS	MENTAL HEALTH & WELL-BEING APPS
Diabetes		✓	✓	✓	✓
Lower Back & Neck Pain		✓	✓	✓	✓
Premenstrual Syndrome		✓			✓
PCOD/PCOS <sup>2</sup>		✓			✓
Nutritional Deficiencies	✓		✓	✓	✓
Digestive Diseases <sup>3</sup>	✓				
Sexually Transmitted Diseases	✓	✓			
Tropical Diseases (e.g., Dengue)	✓				
Obesity		✓	✓	✓	✓
Periodontal Disease	✓				
Acne	✓				✓
Skin Pigmentation	✓				
Oral Issue (e.g., Cavities)	✓		✓		
Cold, Cough & Flu	✓				
Dermatitis	✓				
Photoaging (i.e., Sun Exposure)	✓				
Fungal Skin Diseases	✓				
Migraine/Headache	✓	✓			✓

Increasing importance as complementary solution for chronic disease patients

## UNDERLYING TECH



- **Software** solutions to help track symptoms.
- **Image recognition** to support diagnosis.
- **Data analytics** to generate insights based on monitoring and analysis of real-time data from medical devices and wearables.

1. Digital Care and Digital Therapeutics separate to highlight the chronic disease management and treatment aspect of Therapeutics while Digital Care focuses on telemedicine and RPM, 2. Polycystic Ovarian Disease/Polycystic Ovary Syndrome, 3. Food poisoning, traveller's diarrhoea, etc.

Source: Kearney



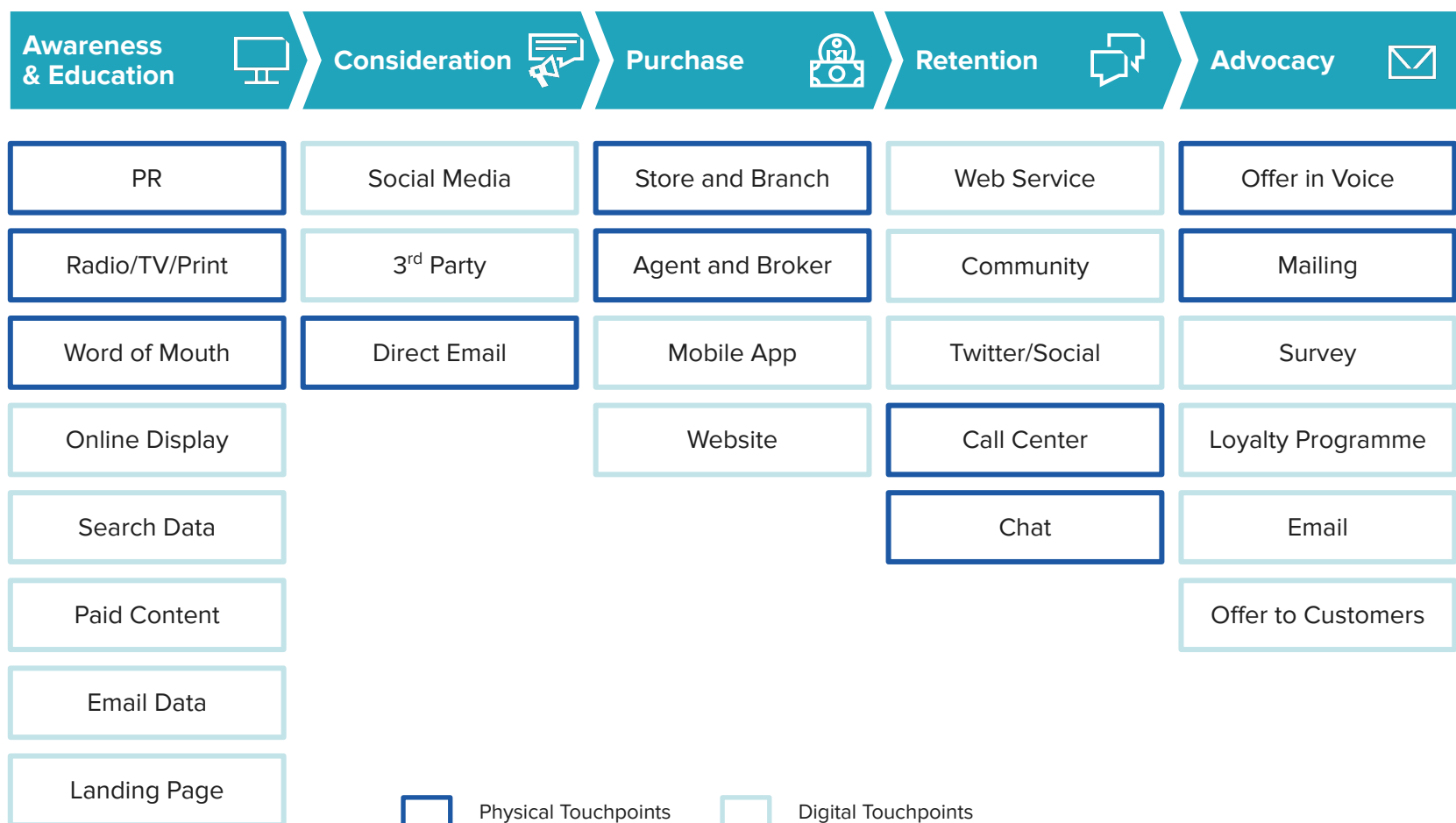
# FOR MANUFACTURERS & RETAILERS, THE IMPLEMENTATION OF TECHNOLOGY SOLUTIONS CAN OCCUR AT DIFFERENT TOUCH POINTS THROUGHOUT THE CONSUMER JOURNEY



KEARNEY

## CONSUMER JOURNEY MAP

Non-exhaustive



Source: Kearney

## EXAMPLES OF TECHNOLOGY SOLUTIONS COMMONLY USED THROUGHOUT THE CONSUMER JOURNEY

*Non-exhaustive*

	Awareness & Education	Consideration	Purchase	Retention	Advocacy
Digital Care	✓	✓	✓	✓	✓
Digital Therapeutics	✓	✓	✓	✓	✓
Wearables & Health Tracking	✓	✓	✓	✓	✓
Fitness, Nutrition & Diet Apps	✓	✓	✓	✓	✓
Mental Health & Wellbeing Apps	✓	✓	✓	✓	✓







































Fact-based and structured decision guidance on **consumer journey focus** by **selected tech solution**

Source: Kearney

# BUILDING ON TECHNOLOGY SOLUTIONS, 50+ CASE STUDIES WERE IDENTIFIED ACROSS MANUFACTURERS AND RETAILERS FOR PREVENTATIVE HEALTH INTERVENTIONS ACROSS THE CONSUMER JOURNEY

Non-exhaustive

## SELECT USE CASES ALONG CONSUMER JOURNEY

Awareness & Education	Consideration	Purchase	Retention	Advocacy
<div></div> <ul style="list-style-type: none"><li>▶ Free teledentistry services and in-person check-ups under campaign 'Don't wait until it's too late', #TalkToADentist.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ Free telenutrition services including advice on shopping lists in line with budget and prevalent health concerns by a registered dietician.</li><li>▶ Offering part of 'Food as Medicine' platform promoting better nutritional food choices to drive overall well-being.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ Colgate Smiles Club for members to earn rewards by brushing and/or whitening teeth or completing challenges to win discounts and prizes, e.g., glucometer as part of Colgate Diabetics challenges.</li><li>▶ Includes access to oral health tips and tricks.</li></ul>		
<div></div> <ul style="list-style-type: none"><li>▶ Annual 'Wellness Day' offering free health screenings (incl. BMI, glucose) at start of new school year in Walmart pharmacies.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ Nutri Choice tool integrated in My Carrefour app including Nutri Score-based nutritional and price information on 16'000+ products across 70 categories.</li><li>▶ 'List of Suggestions' feature based on recent purchase history offers product suggestions of similar nutritional value and/or at lower price.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ Under Armour loyalty programme UA Rewards with points earned for fitness challenges.</li><li>▶ Challenges, e.g., on UA MapMyRun App.</li></ul>		
<div></div> <ul style="list-style-type: none"><li>▶ Partnership with Diabetes UK.</li><li>▶ Simple and free testing in Tesco pharmacies for men under 40 on risk of type 2 diabetes.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ 'Shop-by-Diet' scanning tool allows customers to determine if products meet certain health preferences like diets, allergens, interactions with medications and medical conditions.</li><li>▶ Includes buildable shopping lists, a "Health Hub" with wellness content and explanations of different diets.</li><li>▶ In partnership with technology company Sifter.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ adiClub membership with access to Calm<sup>1</sup> Premium.</li><li>▶ Exclusive Calm content and points redemption for additional Calm services.</li></ul>		
<div></div> <ul style="list-style-type: none"><li>▶ SOS 'Save Our Skin' campaign by L'Oréal-owned brand La Roche-Posay.</li><li>▶ Free skin cancer screenings at outdoor events and selected retail locations.</li></ul>	<div></div> <ul style="list-style-type: none"><li>▶ Snap2Save, a grocery shopping loyalty app, offering point rewards that can be redeemed for gift cards or healthcare rebates in partnership with technology company Green Piranhas.</li><li>▶ Healthy Food Rewards feature offering up to 4x points for purchasing fresh fruit and/or vegetables.</li></ul>			

 Online
  In-store

Note: Includes CGF members and non-members

1. Mental Health Platform

Source: [Unilever](#), [Walmart](#), [Diabetes UK](#), [L'Oréal](#), [Carrefour](#), [Progressive Grocer](#), [Colgate](#), [PR Newswire](#), [Supermarket News](#), [Calm](#), [Under Armour](#), [Kearney](#)

## VARIOUS AHOLD DELHAIZE BRANDS OFFER FREE, IN-HOUSE DIETITIAN COUNSELLING FOR CONSUMERS, AND/OR PODCASTS ON PREVENTATIVE HEALTH TOPICS



KEARNEY



Illustrative

### HANNAFORD<sup>1</sup> DIETITIAN PROGRAMME



In 2023, Hannaford celebrated the **20th anniversary** of its registered dietitian programme



Providing access to free nutrition education in **over 50 stores** across New England and New York



More than **1000 in-store classes**, tours and online seminars each year on topics such as heart-healthy eating



*The brand also provides education at schools, libraries and healthcare facilities. These efforts have supported **more than 200,000** shoppers so far this year.”*



### GIANT FOOD<sup>1</sup> PODCAST SERIES

Giant Food has created ‘The Healthy Living by Giant’ podcast, available on Apple, Google and Spotify, which is already in its 100th edition. The podcast is a **resource** for customers with **lifestyle-related conditions** (and/or aiming to **prevent** these), such as heart health and diabetes, and an **inspiration** for those looking to try something new or learn more about healthy living.



1. Hannaford and Giant Food (both USA) are part of Ahold Delhaize's great local brands  
Source: [Ahold Delhaize](#), [Giant Food](#), Kearney

## AS WATSON CREATES GLOBAL HEALTH CAMPAIGN TO PROMOTE HOLISTIC WELLBEING

Mental health is often undermined in holistic well-being. Since 2017, AS Watson has been committed to raise the awareness around both physical and mental well-being with its global campaign.



KEARNEY



Illustrative

### GLOBAL HEALTH CAMPAIGN

AS Watson's research reveals that in order to lead a healthier lifestyle, over 80% of the respondents believe that enough sleep, healthy diet and regular exercise can keep them healthy, but 40% of them fail to achieve this. Customers need behavioural nudges to encourage them to live healthier lifestyles.



*Health should be accessible to all and it starts from an active lifestyle, of which, supplier collaboration is an important element in this."*

**Hanks Lee**

Director – Corporate Communications & Brand Marketing



### PROGRAMME OFFERING



**Platform for suppliers** to work with Watsons, reaching more customers via **health professionals from Watsons**.



**Health screening service** for rural elderly where healthcare services are less accessible, served **over 4,000 elderly**.



AI Programme to encourage customers to smile more, **over 1.8m smile index achieved**.

### Research-based Health Campaign

A Global Health Survey was conducted and revealed that the happier a market is, the healthier it will be.



**Short questionnaire about correlation between smile and health**



**Ranking of healthiest and happiest countries in the world**



Motivate **over 20,000** customers to exercise more with GetActive activities across Asia

Source: AS Watson, Kearney

## COLGATE SMILES CLUB REWARDS MEMBERS FOR COLGATE PURCHASES AND OFFERS FREE ORAL HEALTH GUIDANCE



KEARNEY

*Illustrative*

### COLGATE SMILES CLUB

Free loyalty programme for Colgate customers across the assortment of Colgate product offerings

Toothpaste

(Electronic) Toothbrushes

Dental (Whitening)  
Kits

### OFFERING



Member-exclusive  
Rewards & Discounts



Member-Only Access  
to Challenges



Free Dental  
Consultations



Personalized Oral  
Health Tips

### SIGN-UP

Seamless online sign-up on  
*Colgate.com* for personalised  
communication and content



First Name



Email Address



Submit

Source: [Colgate-Palmolive](#), Kearney



## A NATIONAL, IN-STORE AND ONLINE PARTNERSHIP WITH LEADING UK GROCERY RETAILER AND UK NGO TO TACKLE CHILDREN'S ORAL HEALTH ISSUES.



KEARNEY

HALEON

Illustrative

### AQUAFRESH'S SHINE BRIGHT ACADEMY



- 1 million British parents have never taken their children to the dentist.
- Tooth decay affects 25% of five-year-olds in the UK and results in 60,000 lost school days each year.
- Haleon partnered with Tesco & UK Schools Charity to deliver a multi-faceted campaign focused specifically on lower income areas.



*As the #1 kids' oral care brand in the UK, Aquafresh has a responsibility to support better oral health habits in children. We created the Shine Bright Academy in partnership with Tesco to empower thousands of kids and families in a fun and engaging online and in-store format."*

**Rachel Deans**

Global Brand Lead, Family Oral Health



### PROGRAMME OFFERING & RESULTS

#### Kids' Oral Health Literacy Programme



National schools programme with downloadable teacher materials



In-store advice, support and points of service



'Brush Time' interactive app and influencer campaign



**150** Store entrance displays



**517** Stores branded Gondola<sup>1</sup> end tray



**4000+** School packs downloaded

 Source: [Haleon](#), Kearney

Notes. 1. A gondola end is a merchandise display on a shelving unit at the end of an aisle in a retail store.

## THE CALTRATE BONE HEALTH PROGRAMME ENGAGES AND EDUCATES BOTH HEALTHCARE PROFESSIONALS AND CONSUMERS ON HOW TO PREVENT AND MANAGE OSTEOPOROSIS



KEARNEY



HALEON

Illustrative

### CALTRATE BONE HEALTH PROGRAMME

- China has #1 highest osteoporosis rate globally
- Caltrate has partnered with the Chinese Government since 2014 on the Bone Health Programme
- In 2023, the programme expanded to 90 cities, 593 hospitals and 736 pharmacies



*We are committed to improving health inclusivity for millions of people. Improving health for older adults in China is a key government priority given the rapidly ageing population. Our Caltrate Bone Health Programme empowers millions of older adults to better understand the steps they can take to manage and improve their bone health."*

Susan Gu

General Manager (China)



### OFFERING



In-store bone health testing



### PROGRAMME RESULTS (2022)



In partnership with:

# 158,225

Individuals engaged with an in-person bone scan or online mobility test, to help them prevent and manage osteoporosis.

# 2,512,810

People were assisted with prevention and management of osteoporosis by healthcare professionals engaged in the campaign.

Source: Haleon, Kearney

# KENVUE AND WALMART SUPPORT BLACK MOTHERS DURING PREGNANCY AND POSTPARTUM



KEARNEY



Illustrative

## BLACK MATERNAL HEALTH INITIATIVE



Innovative program bringing together manufacturer, retailer and insurers to address racial disparities in maternal health



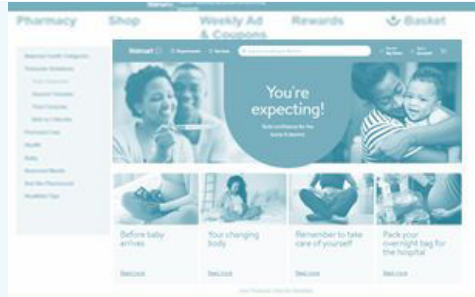
Georgia, USA



*Our goal is to use our collective strength and assets to create healthier communities by helping to close gaps in care and promote healthy behaviour change through solutions that meet people where they are."*

**Monica Simmonds**

Director of Health Equity Program Implementation



## SELF-CARE SUPPORT

Promoting healthy behaviours through digital education and community events that connect mothers to local resources.



## CARING SOLUTIONS

Improving care through bundled maternity and infant solutions.



## PROVIDER EDUCATION & SUPPORT

Improving skills of healthcare professionals in caring for Black pregnant patients via continuing medical education (CME) training.

Source: [Walmart](#), Kearney

## WITH A FOCUS ON FUELLING EDUCATION, AS WATSON AND KENVUE HELP TO IMPROVE ORAL HEALTH IN CHINA



KEARNEY



Illustrative

### DELIVERING 1M+ HEALTHY SMILES IN CHINA



*Together we deliver HEALTHY SMILES to AS Watson customers globally.”*

**Ulli Zillner**

Sr. Director, Customer Execution



#### 1. BUILD AWARENESS

Provide engaging education, both in and out of store, that leverages expertise from healthcare professionals and government.

#### 2. ENGAGE IN-STORE

Optimise in-store experience to support routine-building for oral health

#### 3. OFFER SOLUTIONS

Ensure complete offering of oral healthcare products to support a healthy routine

### HELPING CHILDREN SMILE THROUGH CSR ACTIVATION WITH OPERATION SMILE



Partnership since 2018



Activated across 5 markets



Sponsored 9 international medical missions

**Delivering 1,500+ Operations** to children with cleft conditions

Source: Kenvue, AS Watson, Kearney

## KROGER OFFERS A VARIETY OF COUNSELLING FORMATS THROUGH IT'S 'FOOD AS MEDICINE' PROGRAMME



KEARNEY



### FOOD AS MEDICINE PROGRAMME

**Product and service** offerings to support consumers in making **smarter and more nutritious choices**, to improve **overall wellbeing and cater to chronic health** conditions



*We have always believed in the power of 'food as medicine' when it comes to managing and preventing disease before it starts."*

**Colleen Lindholz**  
President, Kroger Health



### PROGRAMME OFFERING



Virtual consultations with registered dietitian.



Nutritional information and scoring by recognized standards in Kroger app.



Counselling, education and progress tracking via Welsana Diabetes Prevention Programme

### RESEARCH-BACKED PROGRAMME FINDINGS

In partnership with:



Guidance from a registered dietitian in the aisle to promote better adherence to a heart-healthy diet.



How-to guidance on shopping tools for increased adherence to a heart-healthy diet.



Grocery stores considered "healthcare destinations" by surveyed customers.

Source: [Kroger](#), Kearney



## PROCTER & GAMBLE'S 'CLOSING AMERICA'S SMILE GAP' PROGRAMME TRANSFORMS ORAL HEALTH ACCESS, EDUCATION & REPRESENTATION FOR KIDS



KEARNEY

P&amp;G

Illustrative

### #CLOSINGAMERICA'SSMILEGAP



Launched in 2021



Donated 2.5m+ dental products to kids in need



Hosted dental screening and education events for 14,000+ kids



Awarded \$100,000 in dental scholarships

**Tooth decay is the #1 chronic disease among kids in the United States.**

Nearly half of children in low-income households brush less than the recommended amount daily and don't have regular visits to a dentist.



### PROGRAMME OBJECTIVES

#### ACCESS



**Improve access to dental care products & services**

Dental care access events & product donations.

Percentage of proceeds from purchased dental products donated to fund this.

#### EDUCATION



**Educate children on good oral health habits**

Dental care education in school curriculums so teachers can spread the word about healthy habits.

#### REPRESENTATION



**Establish scholarships for under-represented dental students**

Scholarships awarded every year to minority students to drive more diversity among the next generation of dentists.

Source: P&G, Kearney



## VASELINE LAUNCHES 'SEE MY SKIN' DATABASE



KEARNEY



Illustrative

## 'SEE MY SKIN' DATABASE

**An online database** designed to search conditions on BIPOC consumers and connect people with the proper care they deserve. **Provides people access to quality and impartial skincare** with a robust database of board-certified dermatologists.



*Our goal is to provide solutions that ensure communities are equipped to get the care that everyone deserves. This is a step in that direction.*

**Kevin Tolson**

Brand Director of US Skincare



## PROGRAMME OFFERING



Empowering  
equitable skin care



Verified accuracy and  
relevance by board-certified  
dermatologists



Unlocking the power of 'See  
My Skin' as an educational  
resource

IMPACT WITHIN THE  
FIRST 2 WEEKS...

In partnership with:



Organically earned visibility for  
over 50 unique key words and  
generated more than 6,000  
visits



59% of organic views came  
from users searching for a  
specific skin image or  
skin-related concern



48% of those who searched  
on the site were empowered  
to advocate and act for  
themselves

Source: [Vaseline](#), Kearney

## WALMART 'WELLNESS DAYS' MAKE HEALTH SCREENINGS ACCESSIBLE AT KEY SEASONAL DATES, INCLUDING THE START OF SUMMER AND BACK-TO-SCHOOL SEASON



KEARNEY



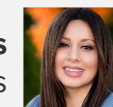
Illustrative

### WALMART 'WELLNESS DAYS'

Offered **since 2014****5m+** free health screenings to dateIn **Walmart pharmacies** across the US

'Wellness Days' reflect our commitment to make wellness more accessible and affordable for our customers by offering a wide range of innovative products and services at incredible value through a convenient, seamless omnichannel experience."

**Silvia Kawas**  
EVP Consumables



### OFFERING

#### Free Health Screenings

Glucose &  
CholesterolBody Mass  
Index (BMI)Blood  
Pressure

Flu/COVID-19



Tetanus



Hepatitis A/B

Source: [Walmart](#), Kearney

## AS WATSON AND L'ORÉAL LAUNCHED AN AI-POWERED SKINCARE ANALYSIS TOOL, 'SKINFIE LAB'



KEARNEY



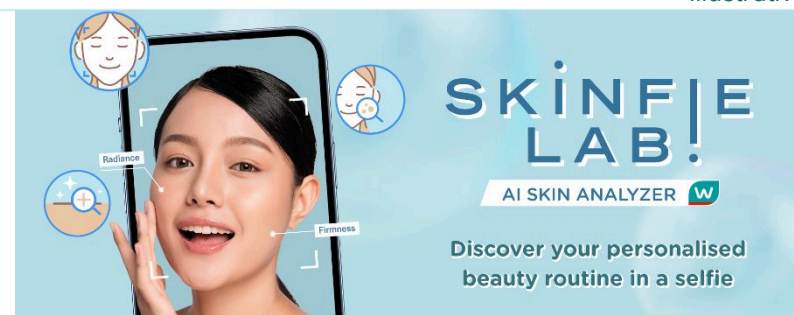
AS Watson

L'ORÉAL

Illustrative

### SKINFIE LAB

Creates highly **personalised skincare product recommendations** based on customers' selfies. Skinfie Lab has been built and **validated using over 16,000 selfie images** is able to detect a range of facial attributes from a customer's selfie.



### PROGRAMME OFFERING



Personalised skincare product recommendations based on customers' selfies



Personalized, in-depth skin analysis generated

### SIGN-UP

Seamless, online registration on *skinfie.ai* for questionnaire and selfie upload



Answer short questionnaire about customers' skin conditions



Take customer selfies using mobile phone or laptop



Receive detailed skin analysis and personalized skincare recommendations

Source: [AS Watson](#), Kearney

[theconsumergoodsforum.com](http://theconsumergoodsforum.com)

