

New Paradigm of Connected Health

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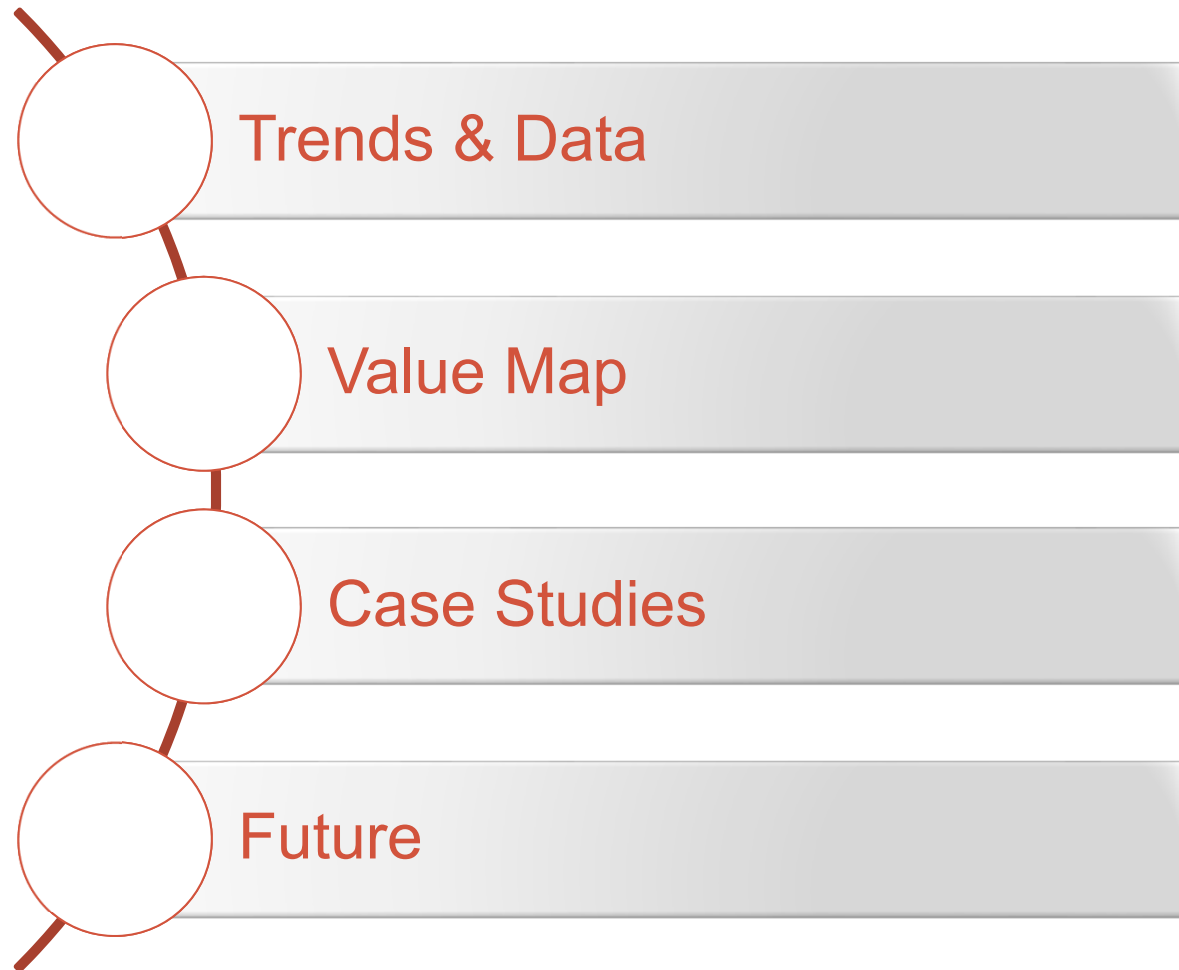
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Shire



“Brain surgery? I have an app for that!”

Agenda

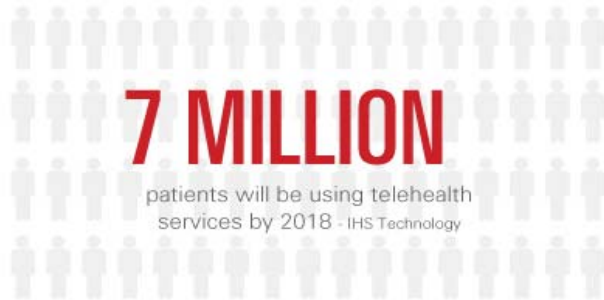


TRENDS & DATA

Connected Health Trends

TREND 1

THE YEAR OF TELEHEALTH



TREND 2

MARKET-DRIVEN PATIENT ENGAGEMENT

+50%
of consumer interactions occur in multi-vendor multi-channel environments



TREND 3

MEANINGFUL USE IS DEAD; LONG LIVE OUTCOMES-BASED CARE



40%
of payments to physicians and hospitals are now designed to incentivize quality improvement and waste reduction
- Catalyst for Payment Reform

TREND 4

HEALTHCARE PLAN MEGA MERGERS IMPACT MEMBER EXPERIENCE



of the US healthcare market is covered by the big 3 health insurance companies
- Leerink Partners, LLC



Connected Health Trends

TREND 5

PATIENT-CENTERED ACTIVITY MONITORING

155.7 MILLION

wearable technology units will ship in 2019, up from 72.1 million in 2014

- International Data Cooperation (IDC)



TREND 6

INCREASED OWNERSHIP OF DATA BY PATIENTS

+60%

of respondents want an app to access their medical records

- Mobile Health Study, New York University



TREND 7

REFINING THE PATIENT AS A CONSUMER DATA STORY

Healthcare analytics market worth

\$18.7 BILLION BY 2020

- Markets and Markets

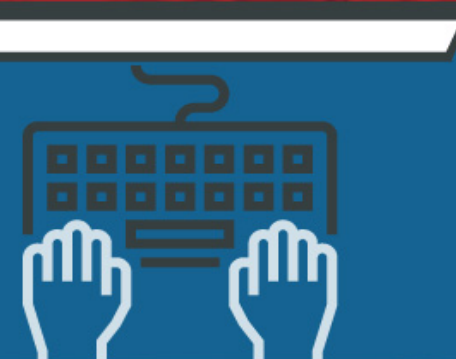


TREND 8

RETURN IN IMPORTANCE OF THE CLINICIAN EXPERIENCE (MU RELEASE)

25%

of an employee's time is spent looking for information



Connected Health Trends

TREND 9

INTERNET OF THINGS AND MOBILE HEALTH IMPACT DATA SECURITY

The worldwide IoT market will grow to

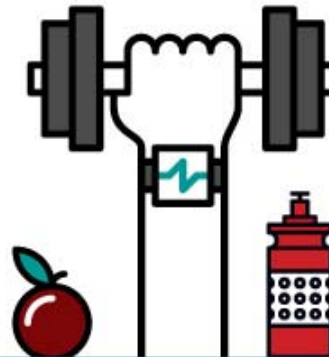
\$1.7 TRILLION IN 2020

- International Data Corporation (IDC)



TREND 10

HIGH-TOUCH DIGITAL CARE



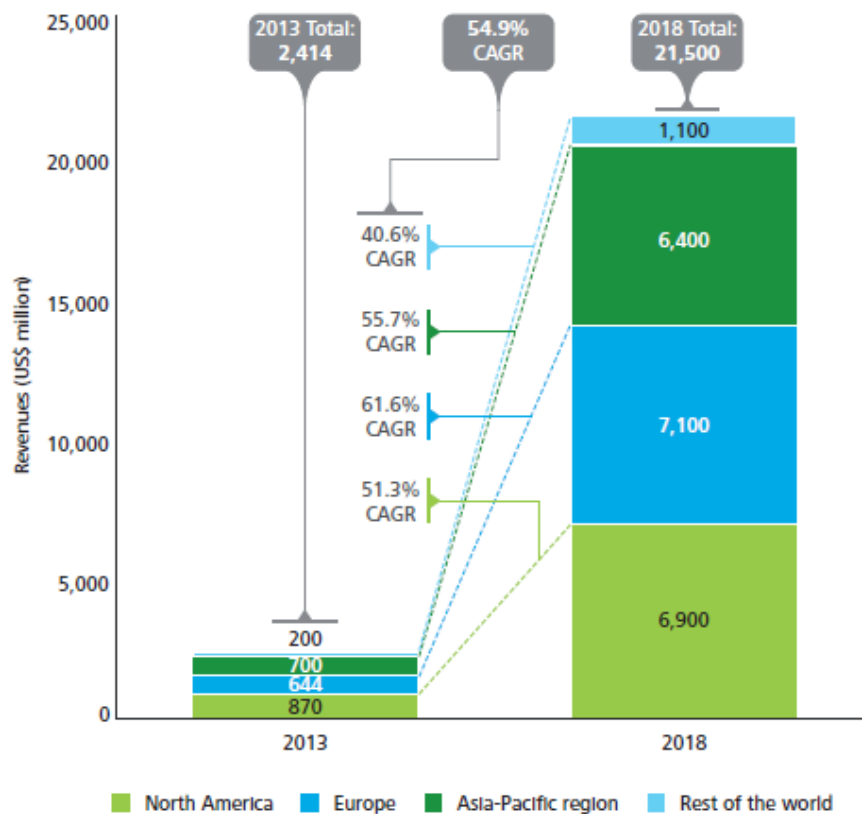
56%

of U.S. adults want to
monitor their health with
connected health devices

- A&D Medical

Connected Health Trends

Global mHealth market revenues, 2013-2018 (USD million)

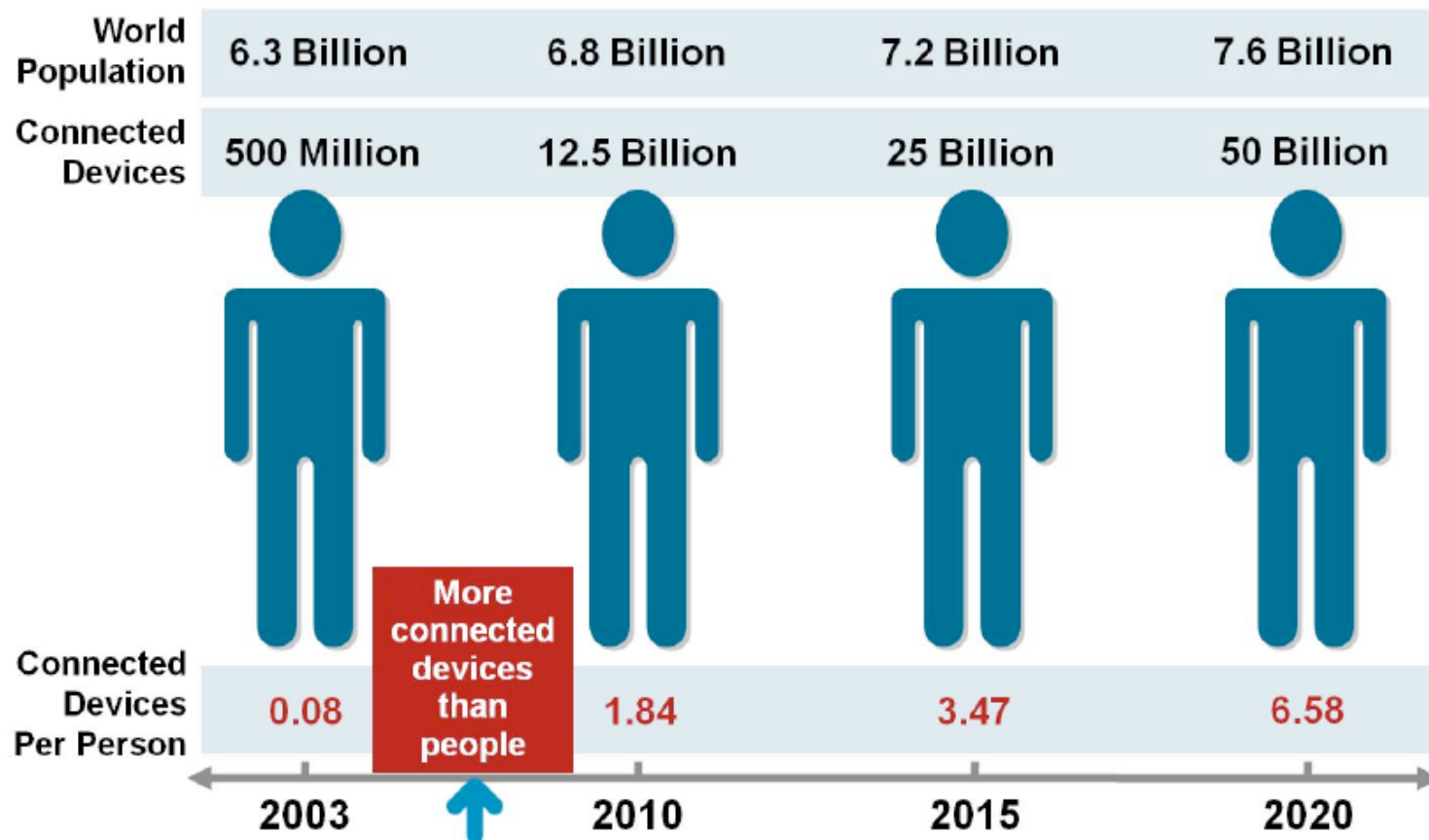


- The Connected Health market is evolving at increasing pace
- Connected Medical Devices and Healthcare related mobile application are the major areas of growth

The value of the global connected health market in 2013 was \$2.4B and is forecast to reach \$21.5B by 2018, a compound growth rate of 54.9%

Comparison

The Internet of Things Was "Born" Between 2008 and 2009

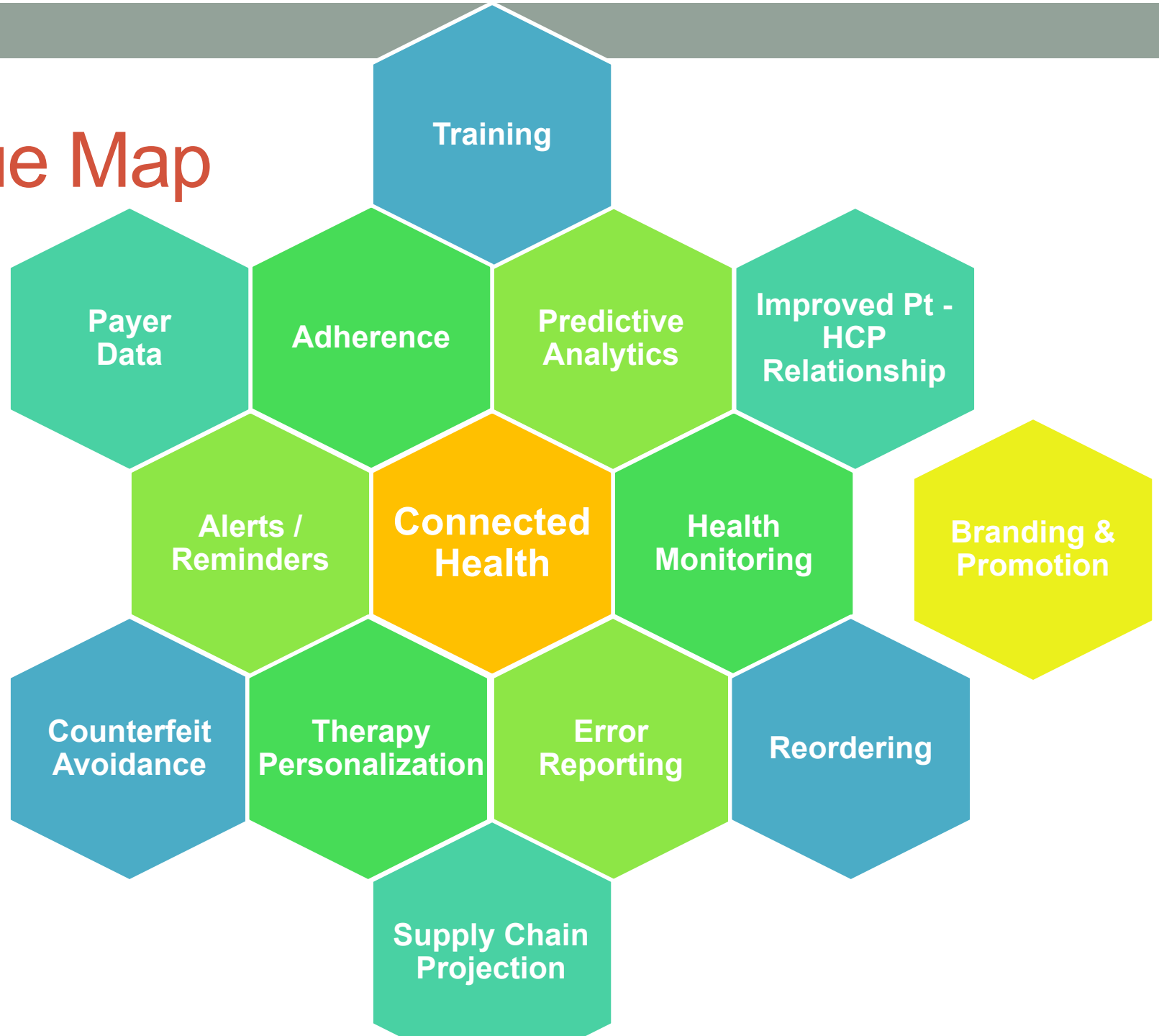


Source: Cisco IBSG, April 2011

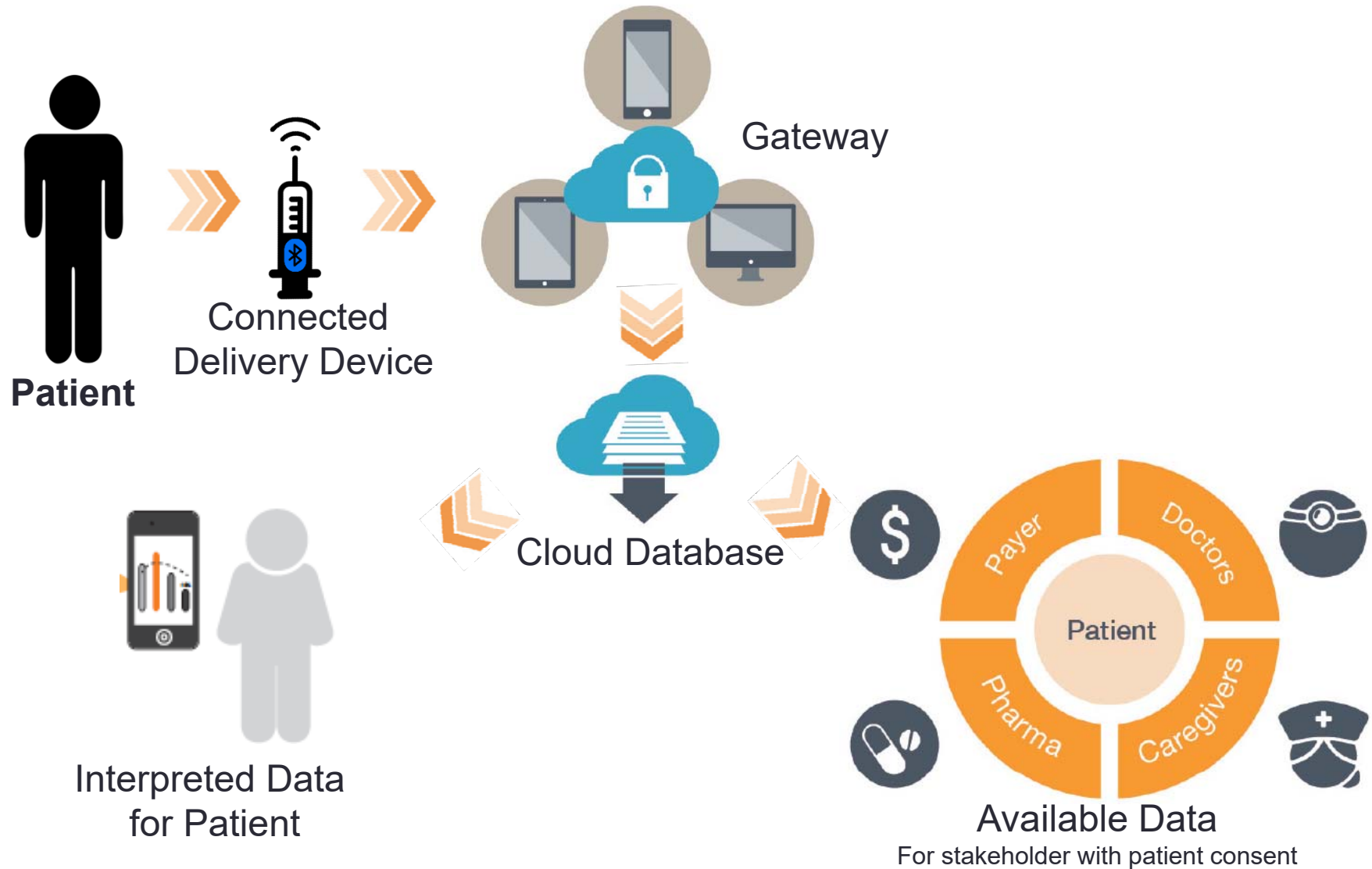
VALUE MAP

Is Connected Health for Everyone?

Value Map



Connected Health Ecosystem



CASE STUDIES

Case Study 1

Connected Diagnostic Device

Name: EyeNetra Autorefractor

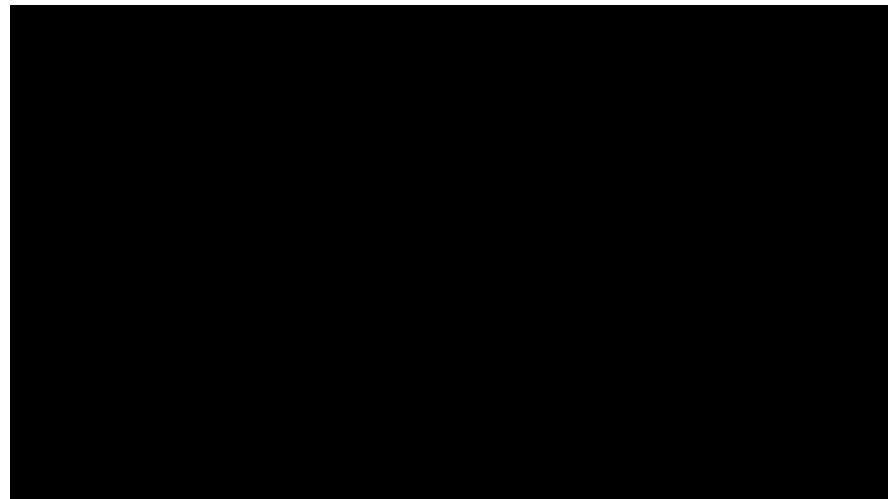
Owner: EyeNetra Inc.

Components:

- EyeNetra Autorefractor device,
- Diagnostic Software (downloadable via an app)
- Analytics software (downloadable via an app)
- User's smartphone

Purpose

- Eye tests in the field



Case Study 2

Clinical Decision Support System

Name: IBM Watson for Oncology

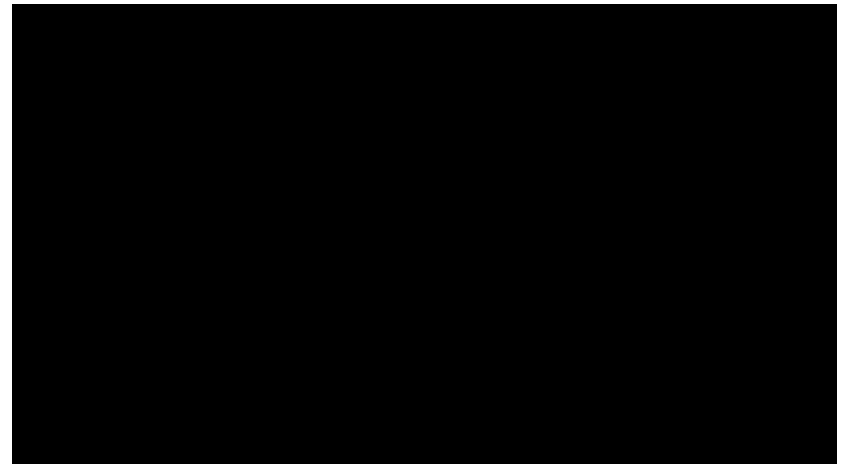
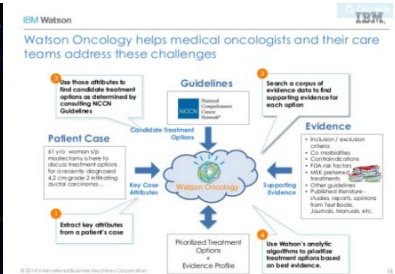
Owner: IBM

Components:

- Artificial intelligence and sophisticated analytical software
- Hosted on a Linux server

Purpose

- Big data analytics leading to insight



Case Study 3

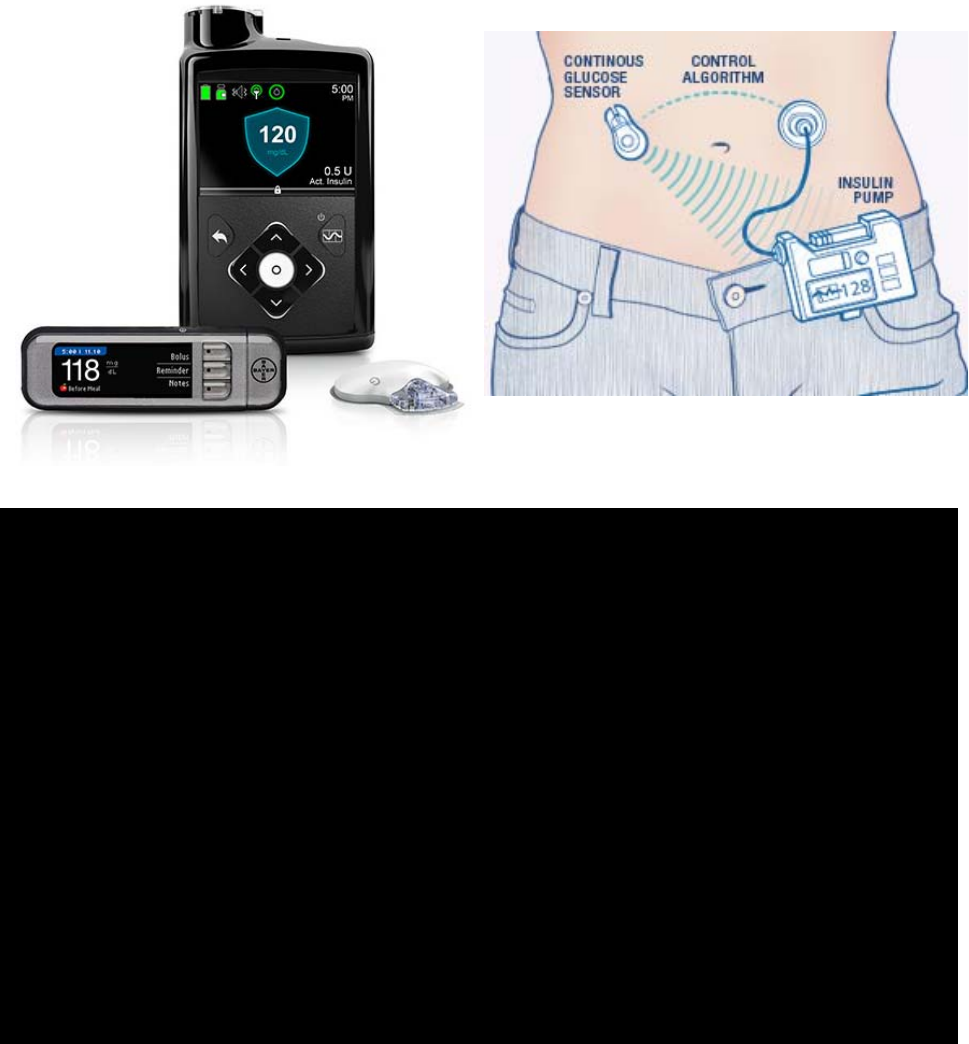
Connected Drug Delivery

Name: MiniMed® 670 G System

Owner: Medtronic Inc.

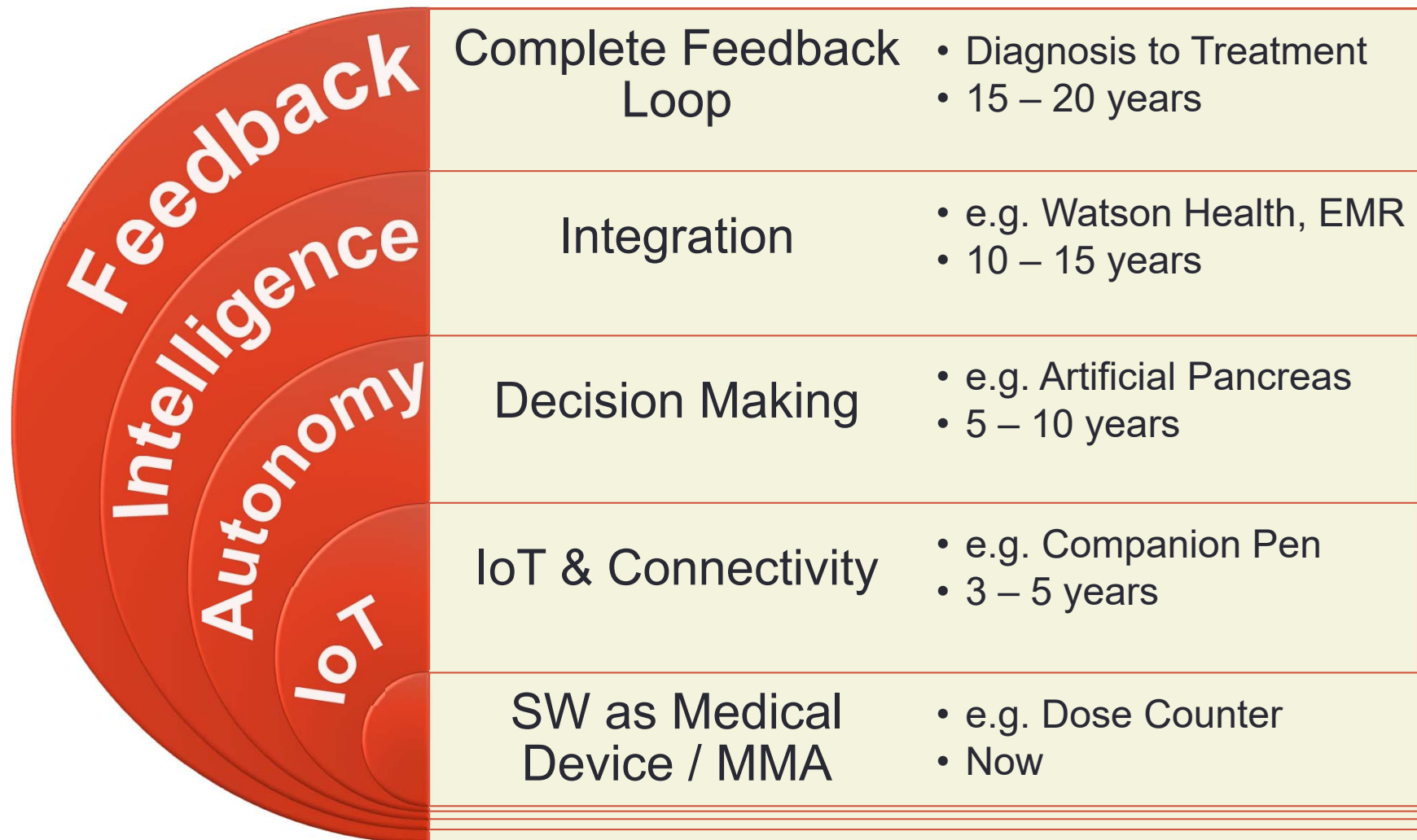
Components:

- MiniMed 670G Insulin pump
- Guardian Sensor 3 (CGM) with MiniLink Real-time transmitter
- MiniMed Connect® Bluetooth Uploader
- MiniMed Connect App for patients (downloadable on smartphone)
- CareLink® Personal Therapy Management software for patients (downloadable on computer)
- Optional CareLink® Pro Therapy Management software for HCP (downloadable on computer)



FUTURE

Future is Now...



Thank You!



Are You Ready for
Connected Health?