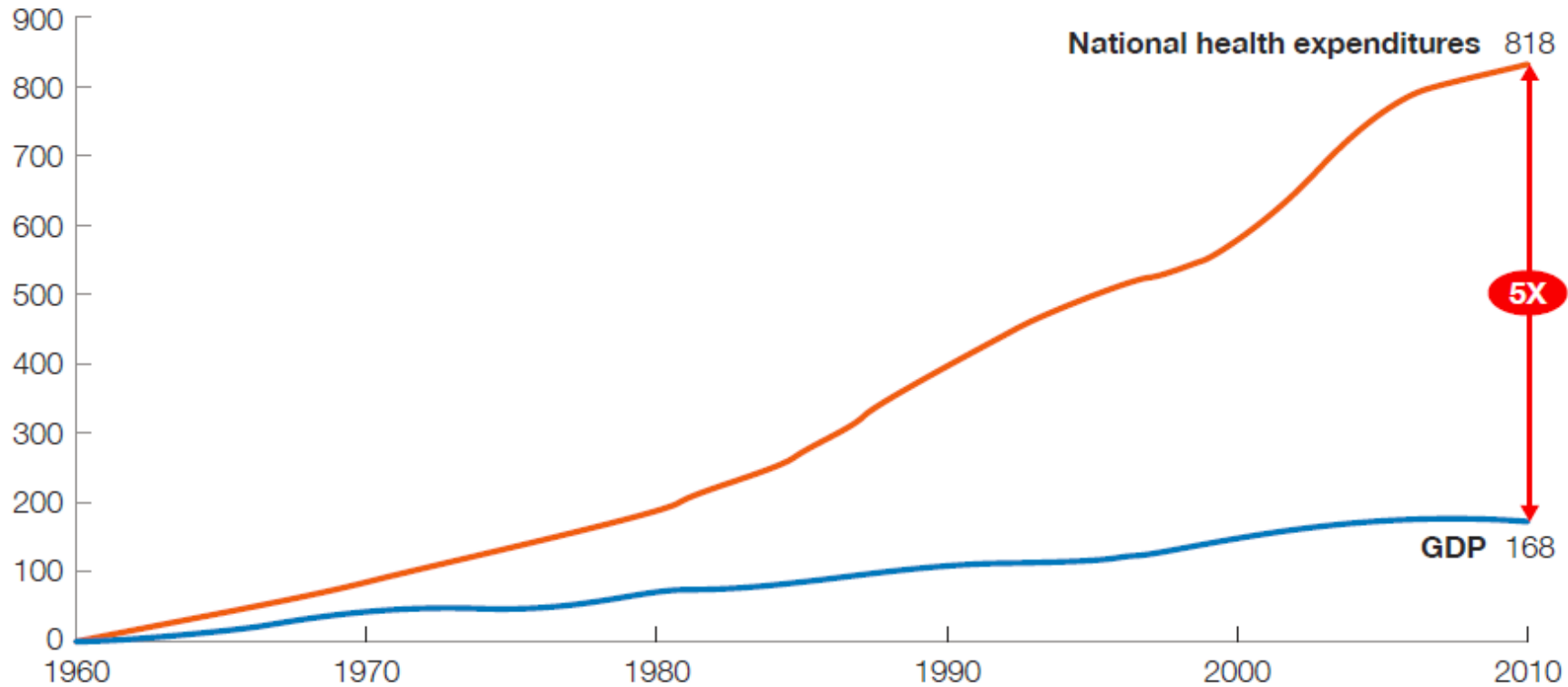


Collaborative Healthcare Meets Healthcare Reform

Ron Emerson RN BSN
Global Director of Healthcare, Polycom

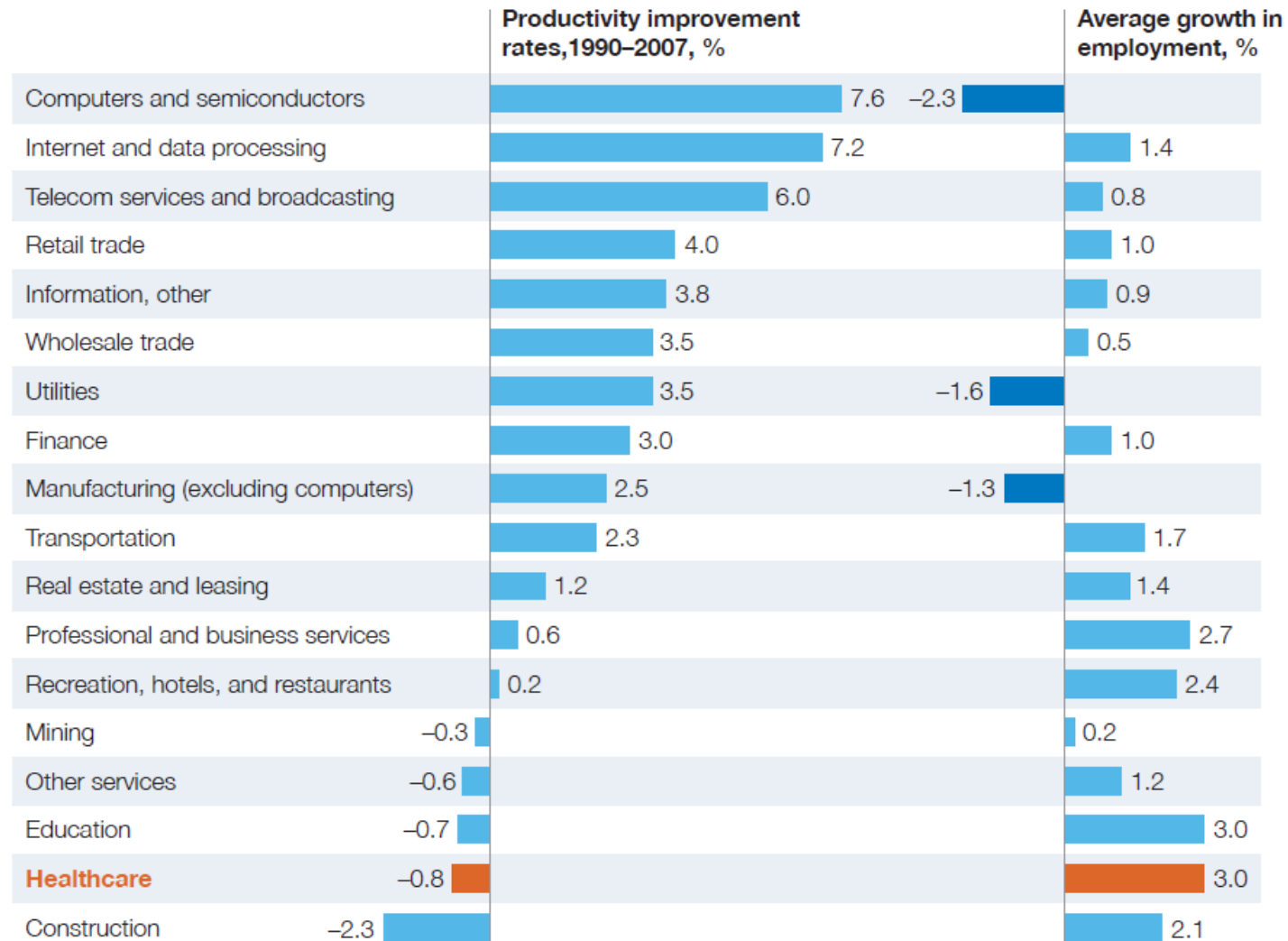
Healthcare is vulnerable to disruption (independent of reform)

Cumulative real per capita growth in national health expenditures vs GDP, % growth since 1960



Source: How US healthcare companies can thrive amid disruption, McKinsey & Company

Healthcare Productivity (Reform IS WHAT Drives Productivity Change)



Source: Bureau of Economic Analysis; Centers for Medicare and Medicaid Services; Haver Analytics; McKinsey analysis

Internet Users by Country (2014)

Search:

Rank	Country	Internet Users	1 Year Growth %	1 Year User Growth	Total Country Population	1 Yr Population Change (%)	Penetration (% of Pop. with Internet)	Country's share of World Population	Country's share of World Internet Users
1	China	641,601,070	4%	24,021,070	1,393,783,836	0.59%	46.03%	19.24%	21.97%
2	United States	279,834,232	7%	17,754,869	322,583,006	0.79%	86.75%	4.45%	9.58%
3	India	243,198,922	14%	29,859,598	1,267,401,849	1.22%	19.19%	17.50%	8.33%
4	Japan	109,252,912	8%	7,668,535	126,999,808	-0.11%	86.03%	1.75%	3.74%
5	Brazil	107,822,831	7%	6,884,333	202,033,670	0.83%	53.37%	2.79%	3.69%
6	Russia	84,437,793	10%	7,494,536	142,467,651	-0.26%	59.27%	1.97%	2.89%
7	Germany	71,727,551	2%	1,525,829	82,652,256	-0.09%	86.78%	1.14%	2.46%
8	Nigeria	67,101,452	16%	9,365,590	178,516,904	2.82%	37.59%	2.46%	2.30%
9	United Kingdom	57,075,826	3%	1,574,653	63,489,234	0.56%	89.90%	0.88%	1.95%
10	France	55,429,382	3%	1,521,369	64,641,279	0.54%	85.75%	0.89%	1.90%
11	Mexico	50,923,060	7%	3,423,153	123,799,215	1.20%	41.13%	1.71%	1.74%
12	South Korea	45,314,248	8%	3,440,213	49,512,026	0.51%	91.52%	0.68%	1.55%

Source: **Internet Live Stats** (www.InternetLiveStats.com)

Elaboration of data by *International Telecommunication Union (ITU)*, *World Bank*, and *United Nations Population Division*.

Number of US Internet Users

United States of America

Year (July 1)	Internet Users**	User Growth	New Users	Country Population	Population Change	Penetration (% of Pop. with Internet)	Country's Share of World Population	Country's Share of World Internet Users	Global Rank
2014*	279,834,232	7%	17,754,869	322,583,006	0.79%	86.75%	4.45%	9.58%	2
2013*	262,079,363	2%	4,820,086	320,050,716	0.80%	81.89%	4.47%	9.66%	2
2012	257,259,277	5%	12,059,473	317,505,266	0.82%	81.03%	4.48%	10.21%	2
2011	245,199,804	6%	14,136,938	314,911,752	0.85%	77.86%	4.50%	10.74%	2
2010	231,062,866	5%	11,323,622	312,247,116	0.89%	74.00%	4.51%	11.29%	2
2009	219,739,244	-3%	-7,187,049	309,491,893	0.92%	71.00%	4.53%	12.44%	2
2008	226,926,293	0%	-913,771	306,657,153	0.94%	74.00%	4.54%	14.44%	2

Source: *Internet Live Stats* (www.InternetLiveStats.com)

Elaboration of data by *International Telecommunication Union (ITU)*, *World Bank*, and *United Nations Population Division*.

Internet User Demographics

As of January 2014, 87% of American adults use the internet.

Internet users in 2014

Among adults, the % who use the internet, email, or access the internet via a mobile device

	Use internet
All adults	87%
Sex	
a Men	87
b Women	86
Race/ethnicity*	
a White	85
b African-American	81
c Hispanic	83
Age group	
a 18-29	97 ^{cd}
b 30-49	93 ^d
c 50-64	88 ^d
d 65+	57

HOUSEHOLD UPLOAD INDEX UNITED STATES ⓘ

8.4 Mbps

BROADBAND

DOWNLOAD
28.2
Mbps

UPLOAD
8.4
Mbps

QUALITY
85.4
R-Factor

VALUE
3.49
Dollars

PROMISE
94.0
Percent

MOBILE

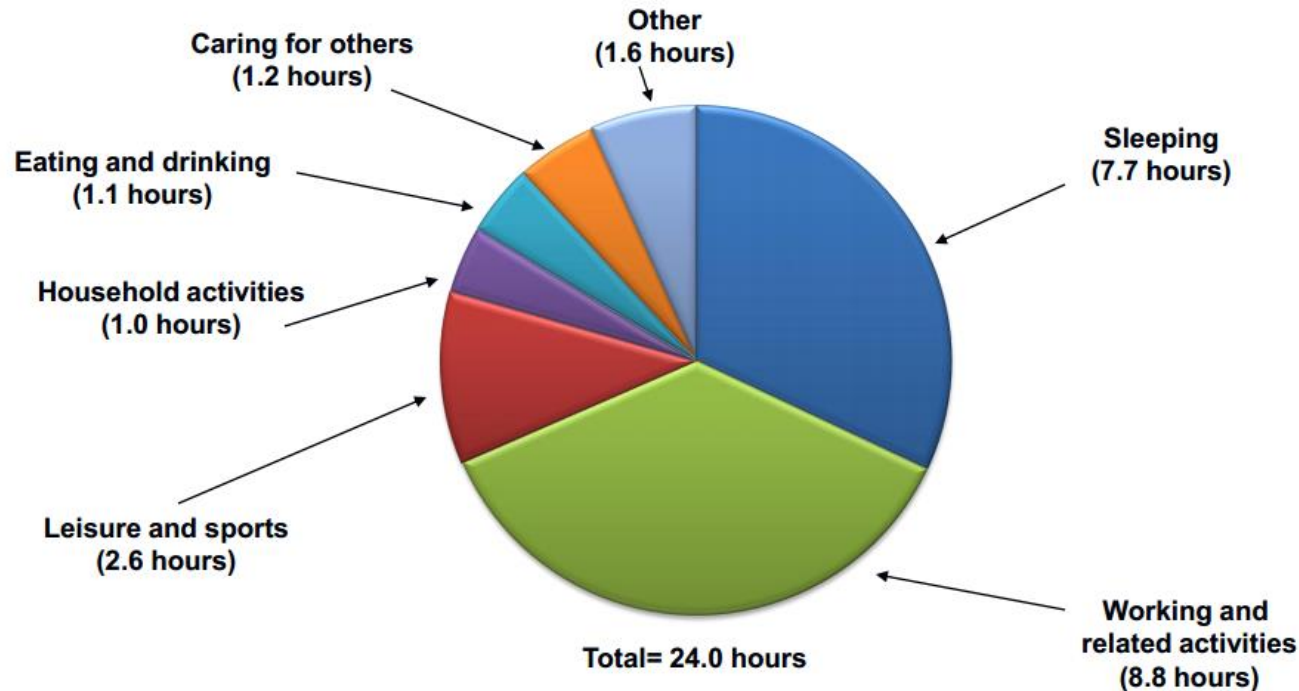
DOWNLOAD
12.3
Mbps

UPLOAD
5.1
Mbps

Source:
OOKLA Net
Index 2014

The Opportunity this provides...

Time use on an average work day for employed persons ages 25 to 54 with children



NOTE: Data include employed persons on days they worked, ages 25 to 54, who lived in households with children under 18. Data include non-holiday weekdays and are annual averages for 2012. Data include related travel for each activity.

SOURCE: Bureau of Labor Statistics, American Time Use Survey

- Accountable Care Act is moving HC away from fee for service and to population health- More touch points regardless of location is critical!

Applications:

- Wellness and Prevention
- Care Coordination
- Remote Monitoring
- Telehealth- Home-Work

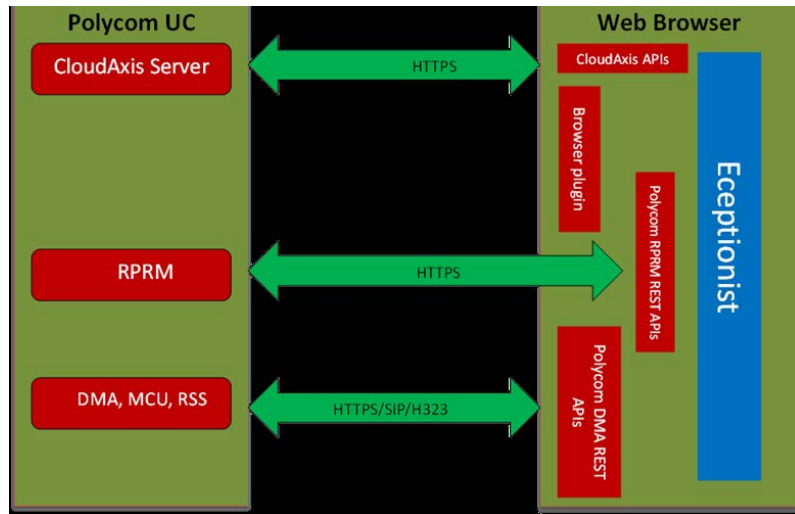
As incentives and reimbursement changes our delivery will too

Collaborative Healthcare

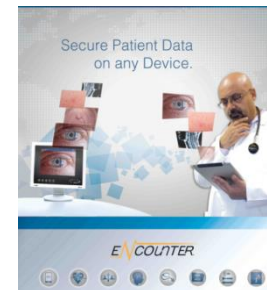
- Patient Centered Care



Telehealth- Interactive Telemedicine Components-



Scheduling and EHR



Devices and PACS



Key Telemedicine Applications...

- Cardiology
- Tele-Stroke
- Mental Health
- Dermatology
- Teleophthamology
- Infectious Disease
- Pediatrics
- Primary Care
- Fetal Maternal
- Telemergency/ Teletrauma
- Teleoncology
- Others....



In Home Telemedicine...



Consumer/ patient driven trends....

- Video enabled called centers for nurse triage assessment, wellness and prevention and general clinician visits...



Wellness and Prevention....



Real-time or Archived for impactful interactions...

Thank you.