



23<sup>rd</sup> June 2023

# Oneview Healthcare

Company Update Webinar hosted by MST Financial



Oneview Healthcare PLC | ABN: 610 611 768

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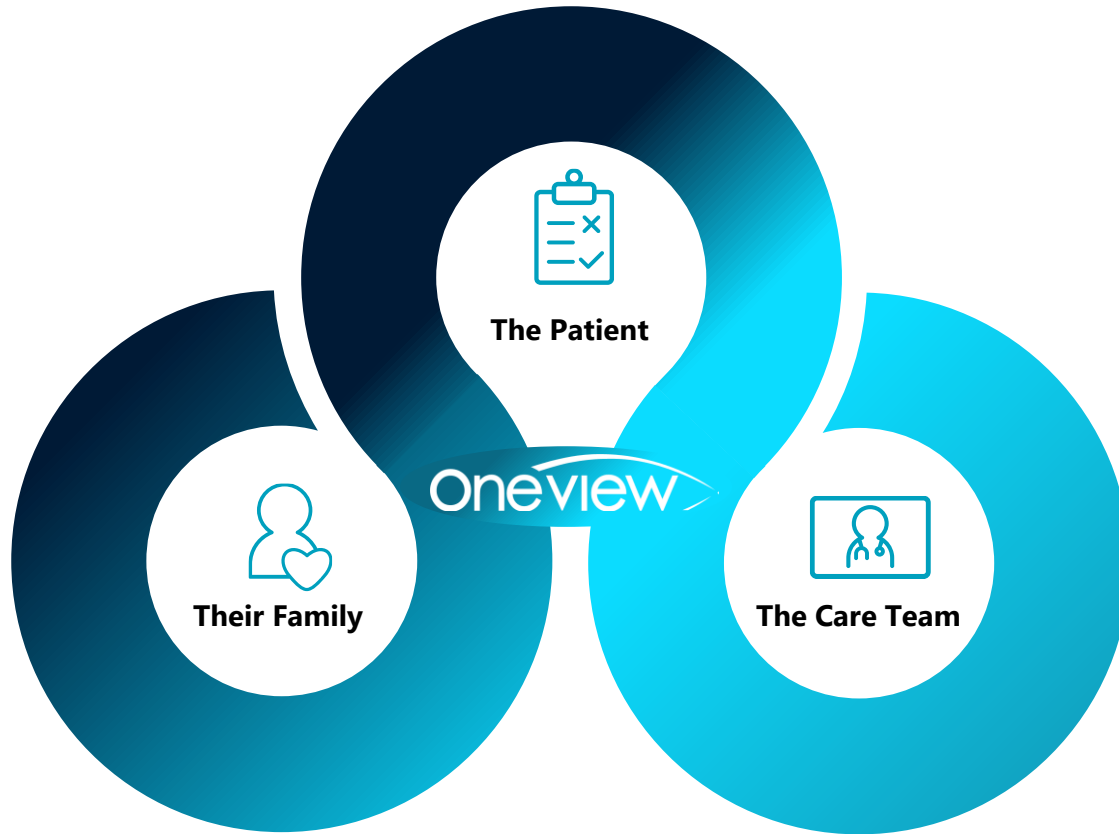
All amounts are in Euro unless otherwise specified.

All references starting with FY refer to the year ended 31st December 2022.

# Contents

1. What we do
2. Navigating the pandemic
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4. BYOD Proposition
5. Competitive landscape in Australia

# What we do



## **Oneview is at the heart of the in-patient experience**

*In unifying a facility's systems, content and services into one digital platform on both hospital-owned and patient-owned devices, we help healthcare providers to improve patient and family experience, achieve operational efficiencies and reduce the burden on clinical staff.*

# Care Experience Platform



## Point of Care

A unified technology platform that enables solving problems today and in the future.

From the door, to the bed, to the footwall, Oneview's technology is set to deliver patient applications and integrations directly where the care team and the patient need them.



## Breadth of Content

Deliver a variety of patient applications, clinical service applications, and partner applications.

Oneview offers access to Virtual Care, Service Request handling, Room Controls, Meal Ordering, Personalized Education, Entertainment, Calming and real-time Patient Feedback.



## Integrations

Outside of our own applications, Oneview integrates with over 60 different systems and content services.

From EHRs, to Entertainment, to Dietary services, virtual care and many other categories, our platform brings them all together.



## Platform & Analytics

Flexible platform and licensing tiers to best meet the needs of hospitals and health systems.

Our cloud platform allows customers to gain access and insight to hundreds of crucial datapoints per patient from the time they're admitted until their discharge.

# Navigating the pandemic

No industry was more profoundly affected by the pandemic than the hospital industry – which comprise 100% of Oneview's customer base

We used the time to do whatever we could to enhance value for existing customers by enabling video communication at the bedside primarily through the development of Cloud Start with NYU Langone

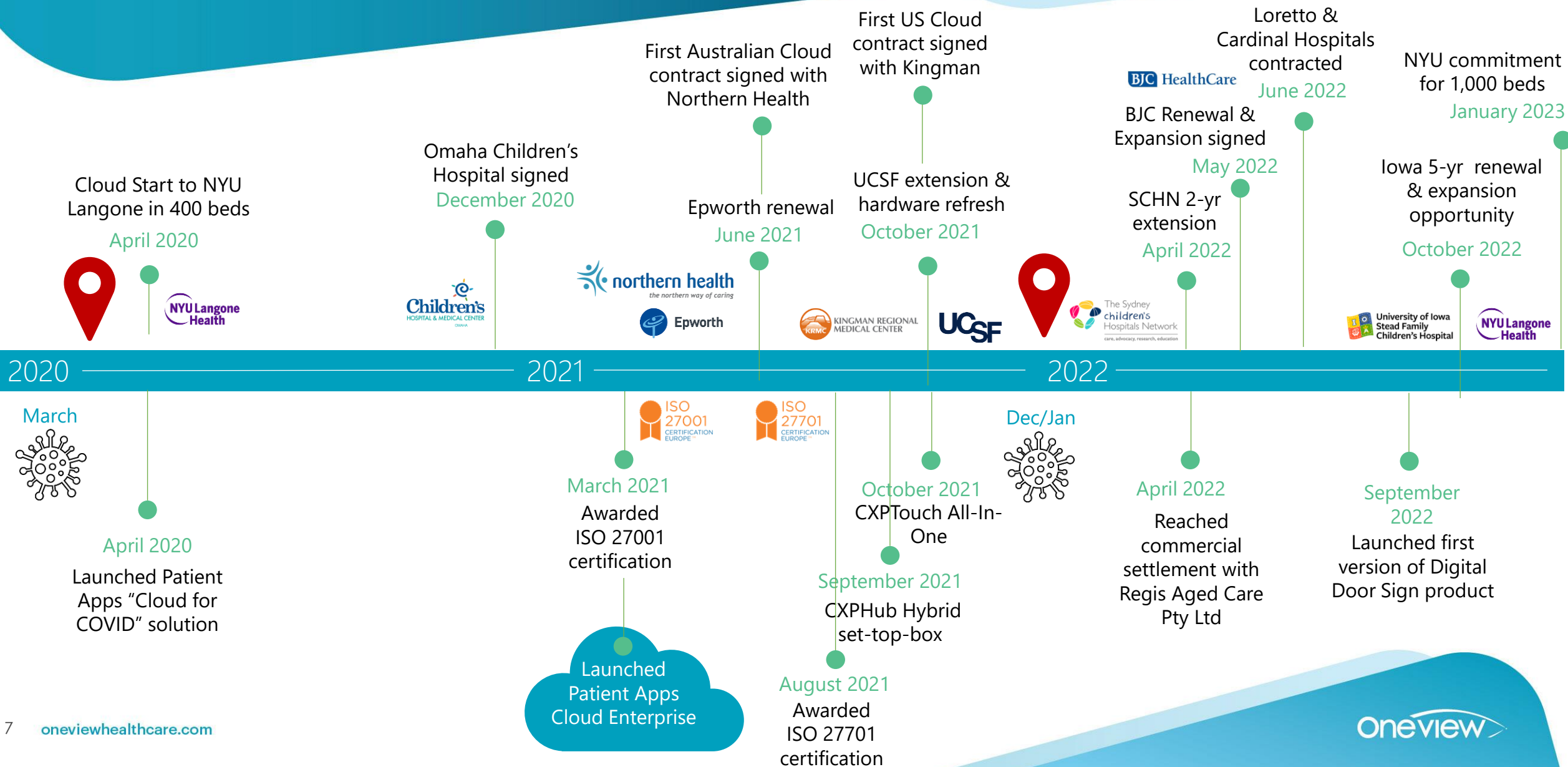
The pandemic validated the value proposition of bedside technology in a very meaningful way and has created pent-up demand for new hybrid models of care

Our core hypothesis was that the market would reopen in 2023 which was validated by record net new customer acquisition in Q1





# Pandemic journey



# Our customers



**3** top 20 US hospitals

US



**6** of the World's Best Smart Hospitals

Australia & rest of world





# Our biggest customer is getting bigger ....

The screenshot shows a web browser window with the URL [saintlukeskc.org/about/news/bjc-healthcare-and-saint-lukes-health-system-sign-letter-intent-form-integrated-missouri](https://saintlukeskc.org/about/news/bjc-healthcare-and-saint-lukes-health-system-sign-letter-intent-form-integrated-missouri). The page features a dark blue header with the text "A Special Message to Our Patients — [Learn More](#)". Below this is the Saint Luke's logo and a navigation menu with links: About, Contact, Donate, News, Volunteer, Careers, Education, Medical Professionals, and mySaintLuke's. A search bar is also present. The main content area has a breadcrumb trail: [Home](#) // [ABOUT SAINT LUKE'S](#) // [SAINT LUKE'S NEWSROOM](#) // [BJC HEALTHCARE AND SAINT LUKE'S HEALTH SYSTEM SIGN LETTER OF INTENT TO FORM INTEGRATED MISSOURI-BASED HEALTH SYSTEM](#). The article title is "BJC HealthCare and Saint Luke's Health System Sign Letter of Intent to Form Integrated Missouri-based Health System", dated May 31, 2023. A blue button labeled "FOR THE MEDIA" is visible. The article text begins: "ST. LOUIS and KANSAS CITY, Mo., May 31, 2023 – BJC HealthCare of St. Louis (“BJC”) and Saint Luke's Health System of Kansas City (“Saint Luke’s”) today announced they have signed a non-binding letter of intent to form an integrated, academic, Missouri-based health system capable of expanding health care access to high-quality patient care for more than six million residents in Missouri and beyond. The letter of intent was unanimously approved by both health systems’ Boards of Directors."

If approved this merger will nearly double the size of BJC and take their licensed beds to ~7,000 beds adding a further 16 hospitals.

It is likely they will standardize their patient experience needs across the enterprise.

# The Connected Patient Room

**Patient Tablet**  
patient's "control panel" for their stay

**Patient TV**  
enables 2-way communication, engages and entertains patients and families

**My Stay Overview Board**  
aligns patient, family and care team on the plan for discharge

**Digital Door Sign**  
important information "at a glance" for care team members entering the room



# Connected Patient Room vision

Single bedside technology platform that enables new hybrid models of care in inpatient settings and creates a pathway to “Augmented Care” using AI in the future



Virtual care on tablets enabling tactical communication

- Virtual rounding
- Virtual visitation
- Virtual interpretation



Virtual care on the patient's television with bi-directional camera capability enabling new hybrid care models

- Virtual nursing
- Virtual patient observation to prevent falls and patient harm



Artificial intelligence and autonomous always-on monitoring enables augmented care models

- AI-enabled virtual assistant with ambient voice capability
- Augmented patient observation to prevent falls and patient harm

# Baxter VAR



- Oneview has entered into a Value-Added Reselling Agreement (VAR) with Baxter International, Inc. (NYSE:BAX) ("Baxter") to resell Oneview's Care Experience Platform (CXP) in the US market.
- Under the agreement, CXP Cloud Enterprise will be offered to certain Baxter customers across the United States.
- The agreement is for an initial two-year term and there are no material conditions that need to be satisfied before the commencement of this agreement which is effective immediately.
- Baxter's CC&C portfolio includes nurse call, locating, mobile communications, medical device integrations and alarm management. Adding Oneview's cloud-hosted CXP will broaden the Baxter portfolio in certain markets with patient experience, digital door signs and digital whiteboards, to better connect patients, families and care teams during inpatient visits.
- About Baxter: <https://investor.baxter.com>

# About Baxter



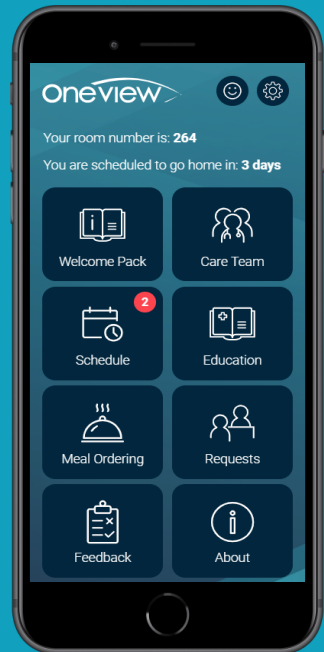
- Baxter, following the acquisition of Hill-Rom Holdings, Inc., is a leading provider of connected hospital beds to the US market and offers one of the leading care communications and collaboration (CC&C) platforms.
- Baxter had global sales of \$15.1b in 2022, with products sold in 100+ countries.
- Baxter acquired Hill-Rom in 2021 for \$10.5b, with a shared vision to transform healthcare by improving clinical outcomes through accelerated product and digital innovation across the care continuum and care settings.
- This acquisition added nurse call, locating, mobile communications, medical device integrations and alarm management to the Baxter portfolio.



# Introducing **BYOD**

The CAPEX constrained healthcare market requires a solution that balances affordability with quality patient care. BYOD, Oneview's BYOD offering, can address this dynamic by providing an unrivalled experience for patients and their families.

Patients can utilise existing features of Oneview's CXP from the convenience of their mobile device, providing access via an SMS/email link and removing friction.



BYOD personalises the in-patient experience for the moments that matter most and empowers the patient by putting them at the heart of their care experience.





# Why develop a BYOD solution?

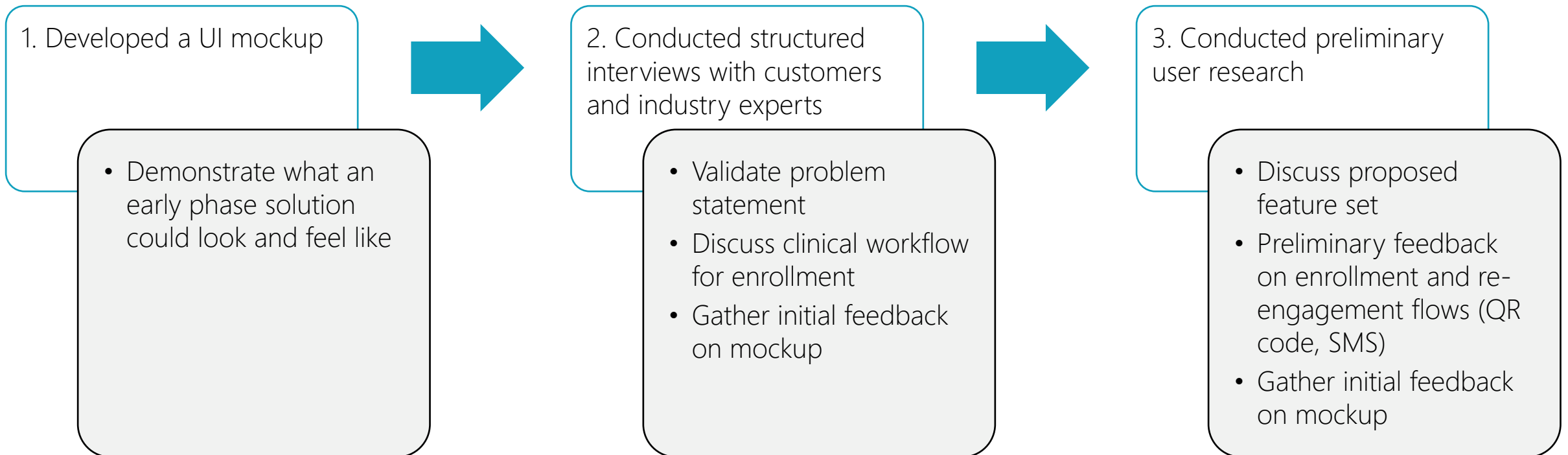
## For Hospitals

- Hospital budgets remain under intense pressure
- Deploying custom hardware in hospital rooms is disruptive and time-consuming
- Supporting OEM hardware at the bedside adds complexity

## For Oneview

- Supporting multiple hardware formats is a huge cost to our business
- New versions of Android often require engineering effort to workaround changes; enrollment steps, permissions etc.
- Reducing hardware and installation costs will make our solution easier to sell

# Market validation approach



# BYOD's Stakeholder Benefits

Empowering patients and optimising hospital care with a seamless, personalised and mobile healthcare experience



## Patient Benefits

**Anytime, anywhere:** BYOD allows patients to access their healthcare information, training materials and entertainment options on their personal devices, offering convenience and flexibility

**Greater autonomy:** The mobile nature empowers patients to manage their care independently, reducing reliance on hospital staff for basic needs, such as meal ordering or environmental control

**Enhanced communication:** The app facilitates easier virtual care and communication with families, remote caregivers, even when patients are away from their hospital room

**Continuity of care:** BYOD ensures patients can continue their care journey even after discharge, as they can access their EHR, training materials and virtual care features from home

## Hospital Benefits

**Seamless integration:** The mobile nature allows for easy integration with existing hospital workflows and systems, ensuring a smooth transition and minimal disruption to operations

**Reduced hardware costs:** By leveraging patients' personal devices, hospitals can save on costs associated with dedicated in-room hardware, such as TVs and bedside tablets

**Increased staff efficiency:** The app reduces the need for staff intervention in non-clinical tasks, allowing them to focus on critical aspects of patient care

**Real-time data capture:** The web app's mobile features enable care teams to capture real-time patient input, providing valuable data for care adjustments and continuous improvement

# Benefits for Oneview

BYOD complements Oneview's core solutions and will drive holistic value for our customers and our business



**Lower procurement barriers:** The mobile SaaS model attracts a wider customer base with no capex, increasing volume and reducing time to revenue



**Remote Implementation:** System compatibility and minimal integration streamline BYOD's entirely remote onboarding process and accelerate market capture



**Cross-sell opportunities:** Introducing a mobile solution enables cross-selling of core products and services, boosting overall sales and customer loyalty



**Reduced OEM dependency:** Managing OEM hardware suppliers is time-consuming and puts pressure on our balance sheet – BYOD removes this



**Data-driven insights:** real-time data allows Oneview to identify usage patterns, driving data-driven decision-making and product enhancement



**Enhanced brand reputation:** Offering a comprehensive and user-friendly mobile solution positions Oneview as a leader in the digital health landscape



**Pre-admission and post-discharge expansion:** BYOD allows Oneview to expand its coverage, enhancing its value proposition and broadening its customer base

# BYOD Market Size

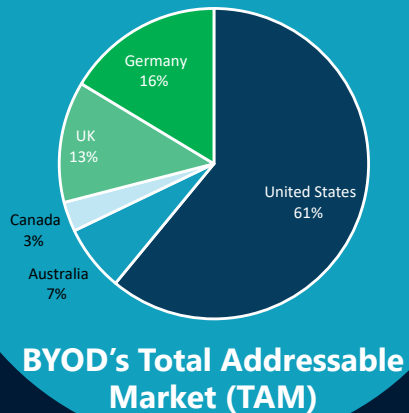
Significant opportunity exists within BYOD's target market, with a 11.3% CAGR forecast to 2026<sup>(1)</sup>

## Annual Recurring TAM

**\$47.1 billion<sup>(1)</sup>**

**EHR & Clinical  
Information Market**

**~\$1 billion<sup>(2)</sup>**

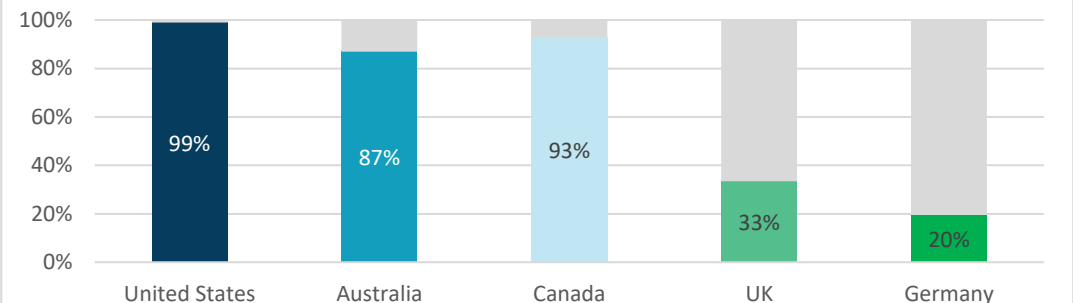


## EHR & Clinical Information Market<sup>(1)</sup>

1. Generalist EHRs and enterprise systems
2. Vertical EHRs and enterprise systems
3. PACS, RIS and clinical image workflows
4. LIS and laboratory workflows
5. RPM software
6. Care coordination and referrals
7. Clinical documentation
8. Care team communication

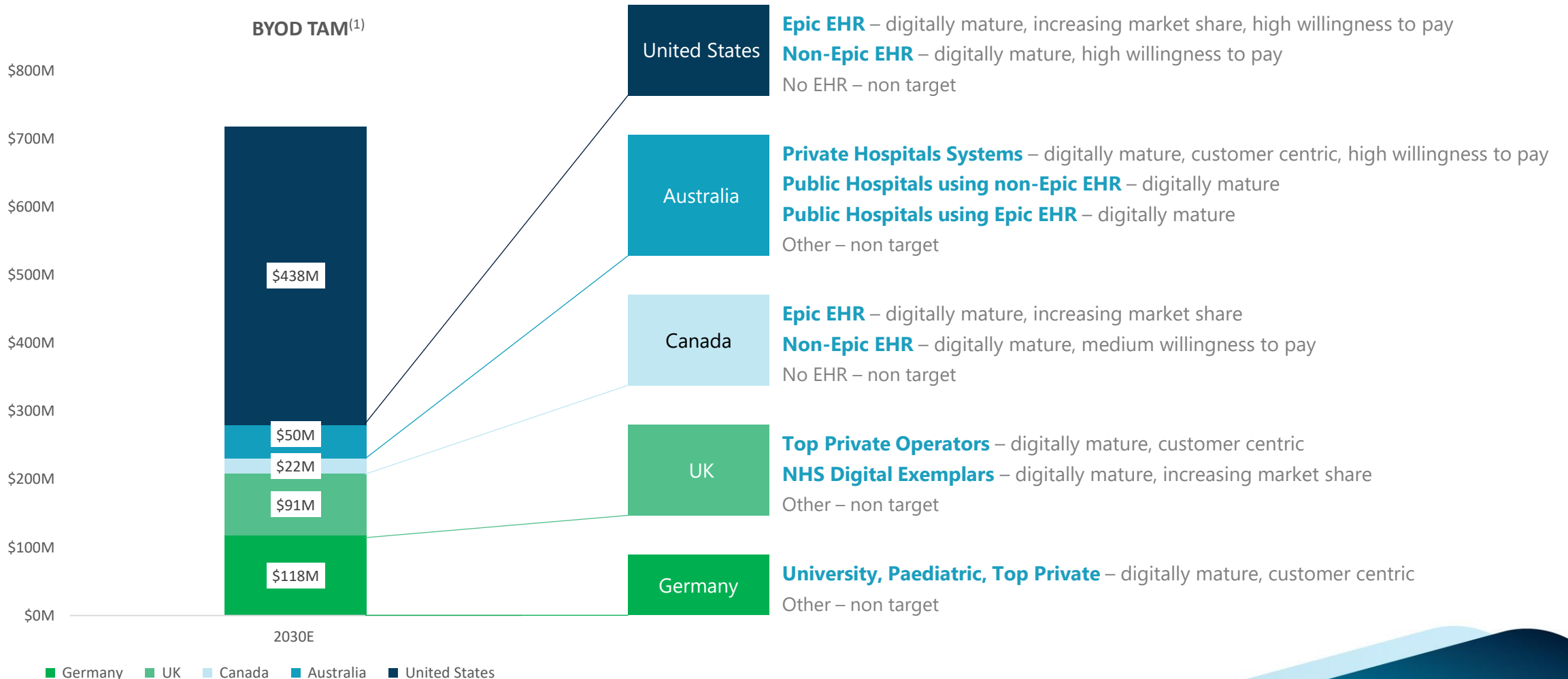
**BYOD's Target Market is a subset of offerings that exist within these verticals**

## % of BYOD's TAM That We Consider Serviceable in 2023



# BYOD Market Segmentation

We will target segments that are digitally mature, focus on customer experience and have high willingness to pay





# Demise of largest Australian competitor ....



Hills Limited has contracts to supply approximately 20% of the Australian hospital market for patient pay entertainment solutions.



Unifying the care experience.

# Questions