FIRST PLENARY:  
Transforming Healthcare and Leveraging Digital Health for Better Health in Asia Pacific

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Melbourne, Australia
World's most liveable city: Melbourne takes top spot for seventh year running

Melbourne has once again been named the world’s most liveable city by The Economist, receiving a perfect score for healthcare, education and infrastructure.

Top five most liveable cities:
1. Melbourne
2. Vienna
3. Vancouver
4. Toronto
5. Adelaide, Calgary

30%
1.31m

8 hospitals

Our sites
We provide quality public health care in our community from over 40 care locations across south eastern Melbourne, including major tertiary and secondary hospitals, aged residential care centres and an extensive network of rehabilitation, community health and mental health facilities.

17,000
45 sites
$1.8b
2200 beds
Rising Demand for Volume and Quality in Healthcare Services Across APAC

Aging population: By 2025, about 25% of APAC’s population will be above 65 years.

Growing trend of co-morbidities: Over 60% of Asians above 65 suffer from at least 2 chronic diseases. Co-morbidities make care more complex and expensive.

Medical tourism growth: India, Thailand, Malaysia, Singapore, and South Korea aggressively promote medical tourism, which encourages adoption and awareness of global best practices in care delivery.

Inefficiency in healthcare workflows: Health systems suffer from redundant processes, repeat diagnostic procedures, and medical errors.

Need for emergency response teams: Many parts of APAC are susceptible to natural disasters, which requires predictive resource mobilization.

Increasing universal coverage: Emerging markets are driving universal coverage, which will boost the demand for services.

Inadequate volume and distribution of medical resources: Most countries have below OECD average numbers of doctors, nurses, and hospitals. Moreover, medical resources are concentrated in urban areas while rural regions are underpenetrated.

Urgent Need to Improve Efficiency of Healthcare Services
Electronic Medical Record

Global Forecast for Electronic Health Records (EHR)

Accenture Study Estimates EHR Market to Reach $22.3 billion by end of 2015

In Billions

<table>
<thead>
<tr>
<th>Year</th>
<th>APAC</th>
<th>EMEA</th>
<th>Americas</th>
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<tr>
<td>2012</td>
<td>$10.8</td>
<td></td>
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<tr>
<td>2013</td>
<td>$19.8</td>
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<td>2014</td>
<td></td>
<td>$10.1</td>
<td>$20.9</td>
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<td>2015</td>
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<td>$22.3</td>
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5.5% CAGR
Digital Health in Asia Pacific

Source: Statista, HIMSS Analytics Electronic Medical Record Adoption Model, PwC Analysis

HIMSS Analytics EMRAMSM Stage 6 and 7 Hospitals in APAC

Total EMR and EHR Market: EMRAMSM Stage 6 and 7 Hospitals, APAC, 2012

1. Chang'An Hospital
2. Shanghai Hospital of China Medical University
3. Yantai Yuhuangding Hospital
4. Seoul National University Bundang Hospital

1. Max Super Specialty Hospital, East Wing
2. Max Super Specialty Hospital, West Wing
3. Prince Court Medical Center
4. KK Women’s & Children’s Hospital
5. National University Hospital
6. Singapore General Hospital
7. Tan Tock Seng Hospital

Source: HIMSS Analytics
da Vinci System Installed Base

4,149 Worldwide as of June 30, 2017

USA
2,703

Europe
698

Asia
538

Rest of World: 210

Source: Company reports
Revenue of Mobile Health

- Asia-Pacific
- Europe
- North America
- Rest of World

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Vision of Shifting Healthcare Trends in the Next Decade
Projected Asia-Pacific health spending growth

- Healthy Living, Preventive Care: +40%
- Hospital Treatment: +35%
- Home and Elderly Healthcare: +25%

Source: IDC, 2017
1. The accelerating pace of change...

2. ...and exponential growth in computing power...

   Computer technology, shown here climbing dramatically by powers of 10, is now progressing more each hour than it did in its entire first 90 years.

   **COMPUTER RANKINGS**

   - **Analytical engine**
     - Charles Babbage’s invention was designed to solve computational and logical problems.
   - **Colossus**
     - The electronic computer, with 1,500 vacuum tubes, helped the British crack German codes during WWII.
   - **UNIVAC I**
     - The first commercially marketed computer, used to tabulate the U.S. Census, occupied 4,943 sq. ft.
   - **Apple II**
     - At a price of $1,298, the compact machine was one of the first mass-market personal computers.
   - **Power Mac 64**
     - The first personal computer to deliver more than 1 trillion floating point operations per second.

3. ...will lead to the Singularity

   - By calculations per second per $1,000.

   - **1900**
     - Electromechanical
   - **1920**
     - RELAYs
   - **1930**
     - Vacuum tubes
   - **1950**
     - Transistors
   - **1980**
     - Integrated circuits

   - **2045**
     - Superhuman brainpower equivalent to that of all human brains combined.

   - **Surpasses total of human in 2023**

   - **Surpasses transhumanism in 2035**