



Bell Potter Healthcare Conference

November 14, 2023



Oneview Healthcare

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The company reports in Euros and financial years align with calendar years. i.e. H1 refers to the period ended 30th June 2023 (H1 23).

Agenda

- Market Overview and Recent Operational Highlights
- 2024 Growth Drivers
- Q&A



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Market Overview

The challenge



Patients have limited control during their stay and rely on nursing for many of their needs



Limited automation and ongoing workforce challenges continue to place burdens on care teams

Market Drivers

Industry Trends

- **Staffing challenges:** nursing staff shortages and staffing costs require new approaches to care delivery, enabled by technology¹.
- **Consumer expectations:** patient expectations of care experiences are evolving, catalyzed by the pandemic².
- **New construction:** healthcare construction funding increased by 35.7% between 2019 and 2023 in the US³
- **Digital transformation:** increasing digitalization in healthcare, with better patient experience the top desired outcome⁴.

Operational Strategies

- **Workflow optimization:** streamlining processes to reduce the burden on nursing by 1 – 12 minutes per nurse call button press avoided⁶.
- **Standardization:** hospital systems seeking a standard technology platform to enable in-room digital innovation and ensure a consistent patient experience⁷.
- **Strategic solutions:** in the US, an estimated 821 hospitals are seeking new patient engagement solutions to replace tactical solutions deployed during the pandemic⁸.
- **Virtual nursing:** bedside technology enables virtual nursing programs, which are increasing at a rate of 34% in the US market⁵.

¹ McKinsey: The productivity imperative for healthcare delivery in the US ⁶ Oneview customer data

² KLAS: Patient Perspectives on Patient Engagement Technology 2022 ⁷ Oneview customer feedback and RFP analysis

³ St Louis Fed: Total Construction Spending for the US market

⁴ Deloitte: Digital Transformation in Healthcare

⁵ HealthTech Magazine: the rise of the virtual nurse

⁸ Fierce Healthcare: Digital Health should brace for a 'significant amount of churn as hospitals reconsider COVID-era tech contracts

Our Market View



Pandemic has catalysed a “crossing of the chasm” for bedside technology – Next-Gen Interactive Patient Care is now “Plateau of Productivity” per Gartner



While new construction still key driver for adoption, hybrid care (remote nursing supporting floor nursing) is a major driver for retrofitting.



Hybrid care models, enabled by bedside technology, are top of mind for healthcare enterprises seeking sustainable staffing strategies.

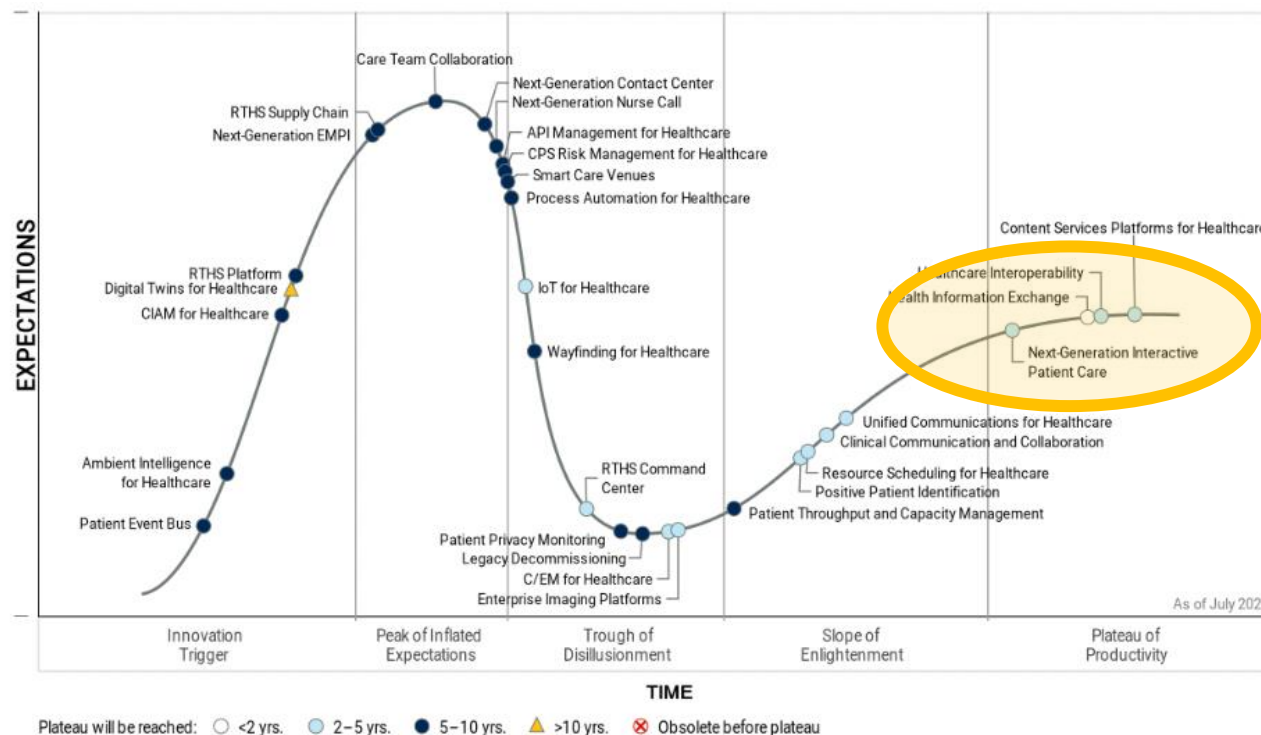


Customers want open, future-proof platforms that support multiple use cases and interoperability without “vendor lock-in”.



Smartphone and tablet adoption across all age groups is a consumer-expectation.

Real-Time Health System Technologies Hype Cycle



Gartner

3Q Highlights



Signed first European Cloud customer – **7-year contract** with Children's Health Ireland for ~600 beds



Signed fourth consecutive **3-year contract extension** with UCSF



Signed Cloud migration and **3-year contract extension** with Bumrungrad International



Hosted NYU Langone Health leadership in Dublin for **co-design workshops for our BYOD product**



Preparation for the Baxter **partnership launch** which took place in California last week



Project work commenced for University of Miami, Catholic Health and Avive deployments

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



2024 Growth Drivers

Virtual Care API

oneview



BLOG

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Video in Healthcare: A Pandemic-Driven Transformation

Written by Niall O'Neill

November 9, 2023



The pandemic transformed the raison d'être of bedside technology.

A scalable open “platform” that can facilitate the delivery of virtual care has become table stakes for our sector.

<https://www.oneviewhealthcare.com/blog/video-in-healthcare-a-pandemic-driven-transformation/>

Baxter launch

Formal launch of the Baxter partnership kicked off in Irvine, CA on November 6th and 7th.

Two days of sales training for over **50 members** of Baxter's national sales organisation including product demos and key messaging.

Detailed **market segmentation** of the entire US hospital market to prioritise initial sales opportunities.



Meal ordering case study



Long-time customer Children's Nebraska has just published a research whitepaper highlighting the impact of digital Meal Ordering on the Oneview platform.

95% of all meals are now ordered electronically on the Oneview platform leading to an **87% decrease** in late and wasted trays daily and reduction in staff call centre times from all day to <2 hours per day.

“

The system is working smoothly, and we have a very high compliance rate. Nurses especially like the functionality of ordering meals from the room tablets," said the Children's Nebraska Food Services Manager, Mindy Coolman, "They don't want to have to deal with paper menus anymore.

”



Children's Nebraska Journey to Digital Meal Ordering

Date & Time Dec 12, 2023 08:00 PM in Dublin

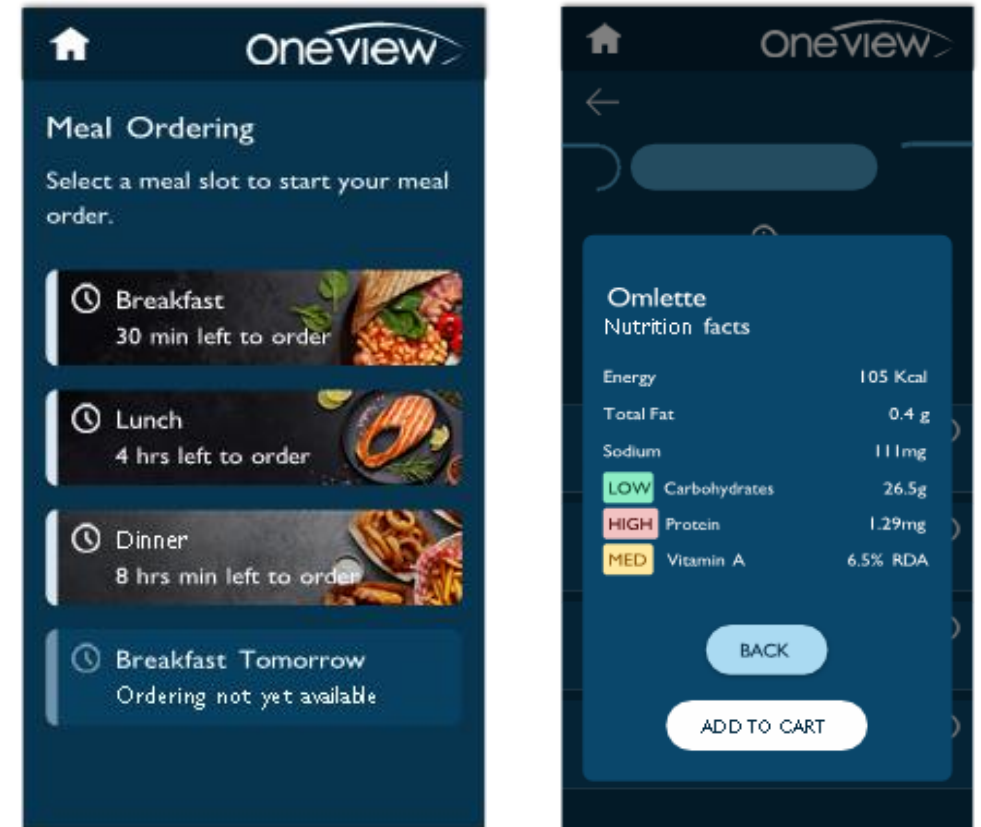
https://oneviewhealthcare.zoom.us/webinar/register/WN_Yn6x_F1HT3Co_rOHIJa_7g#/registration

BYOD Development on Track

Phase I of the new mobile product was delivered on schedule on October 31st and is scheduled for delivery to pilot customers in the US and Ireland

This follows co-design workshops with NYU Langone Health in Dublin in October

Phase II of the product including the critical meal ordering functionality is scheduled for delivery in Q1 2024



Why Oneview?

Innovative technology

- Secure cloud delivery makes it faster, easier and more cost effective to implement and operate Oneview
- Avoids the cost of new Smart TVs and IPTV infrastructure for existing facilities (coax supported)

Value-focused

- Value Framework with class-leading data analytics platform to measure and optimize value
- Virtual Care API enabling hybrid nursing models

Industry-proven

- Oneview is proven with enterprise-wide deployments at top-tier healthcare systems like NYU Langone Health, BJC HealthCare and Epworth.

Industry-Proven



3 top 20 US hospitals



6 of the World's Best Smart Hospitals



US

Australia & rest of world



Questions please

Unifying the care experience.