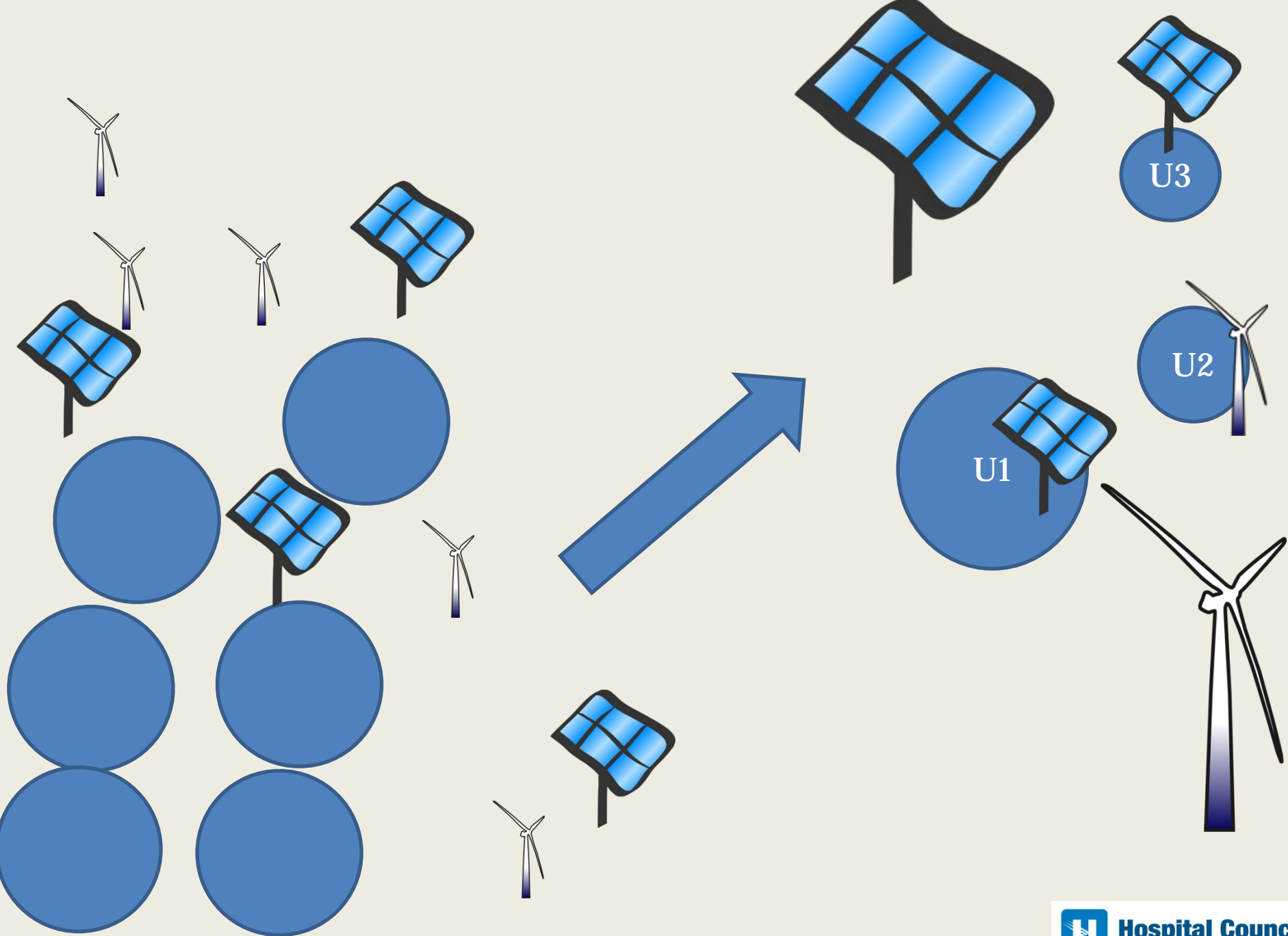


Uber Comes to Healthcare

HEALTHCARE 2030

THE ENERGY STORY

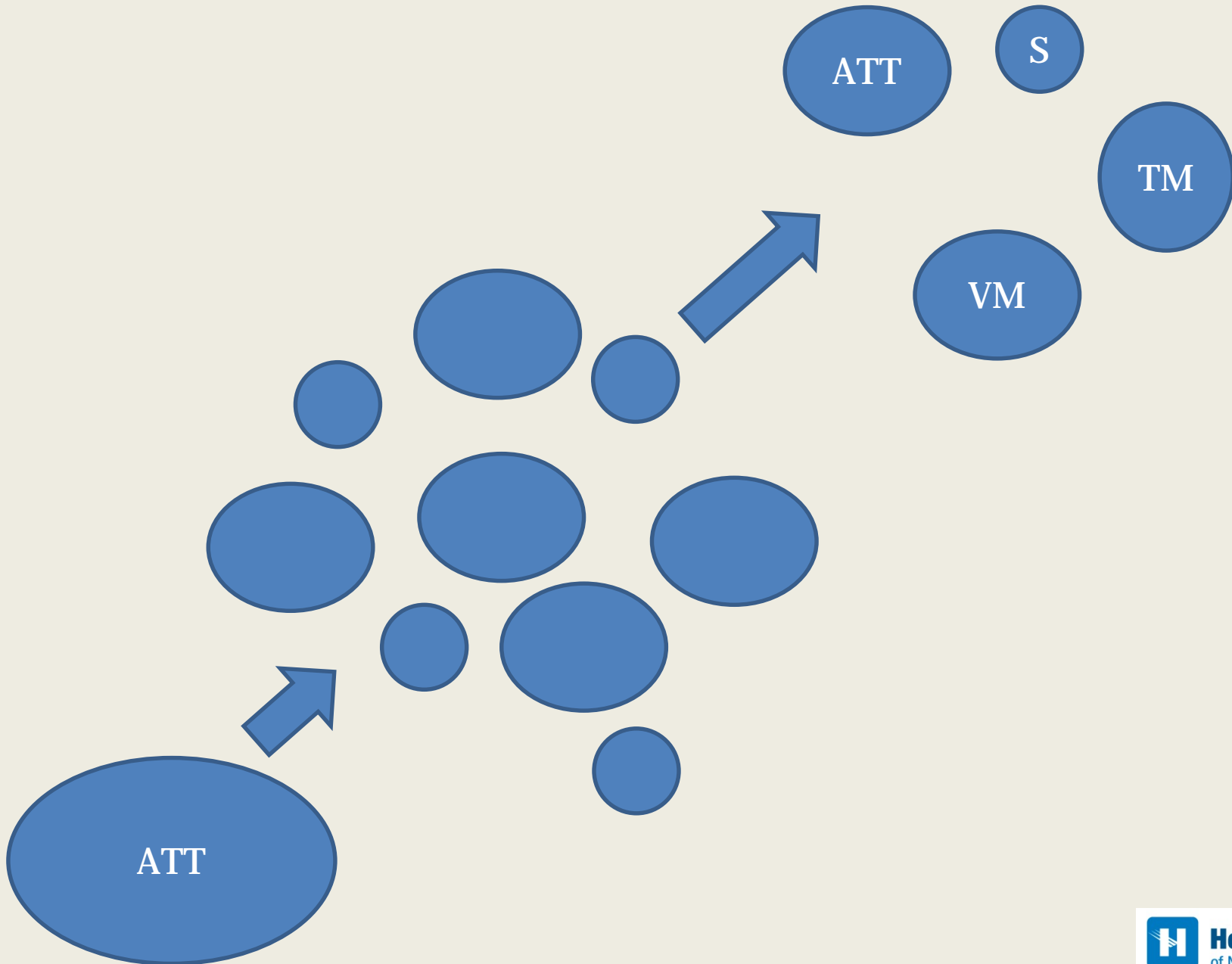
- ✘ Distributed solutions (solar & wind) represent small percentage (1%) of total energy production today.
- ✘ Projected to grow to 20-30% by 2030.
- ✘ Saddling utility companies with large “stranded costs” burden for grid development and maintenance and operations.
- ✘ Now starting to offset with increased hook-up and admin charges for those with distributed solutions (PGE)



Source: David M. Lawrence MD, MPH

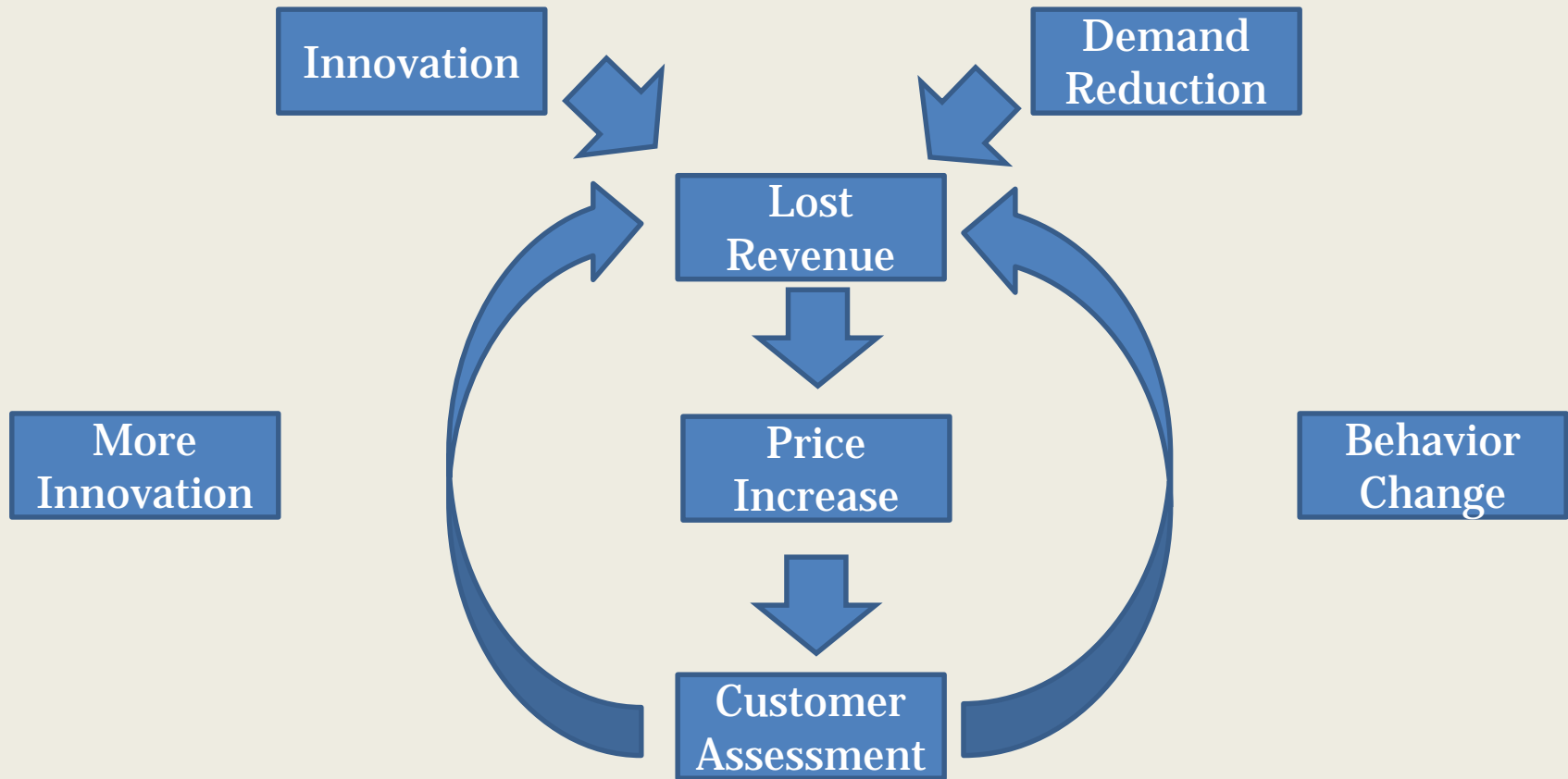
THE TELEPHONE STORY

- × Traditional players with investment in land-line technologies
- × Disrupted by new technology . . .
“distributed” wireless solutions
- × Land-line companies have been replaced by or have become mobile companies with small land-line operations
- × In developing economies, leapfrogged entirely



Source: David M. Lawrence MD, MPH

DISRUPTION'S VICIOUS CYCLE



COULD THIS HAPPEN IN
HEALTHCARE?



Hospital Council
of Northern & Central California

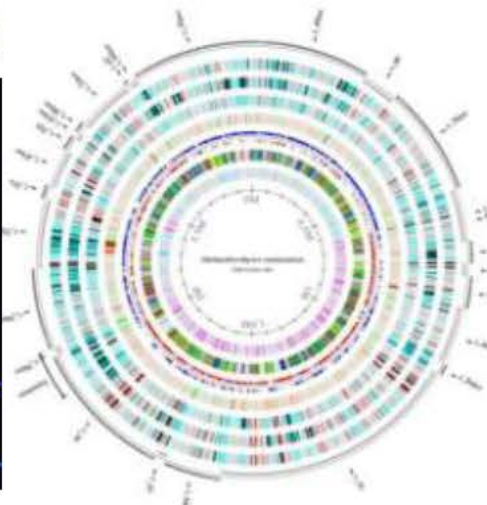
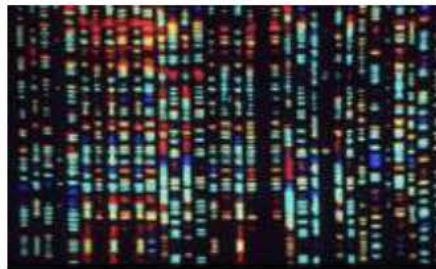
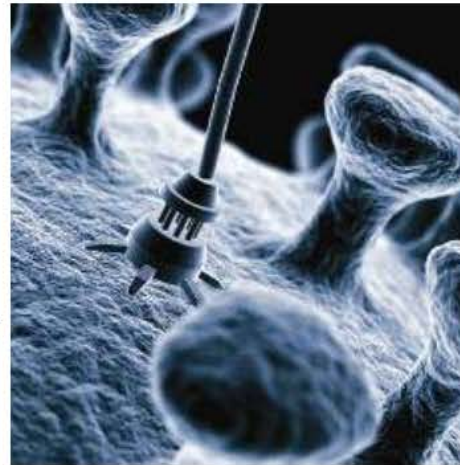
Excellence Through Leadership & Collaboration

M-HEALTH – TODAY!

- × 6,000 medical and fitness apps as of 2014
- × 1,100 apps for diabetes
- × Medical & fitness apps earn the second highest revenue per app behind communications and networking sites
- × \$9B/year in complementary/alternative medicine (3% of ambulatory care spend)
- × 75% of US households have internet
- × 84% of US households have at least one computer
- × 61% of adults have smartphones; 91% have mobile phones



The 21st Century: The Age of Biology



LEADING TO

- × Reduced demand
- × High convenience and satisfaction
- × Care comes to you
- × Significant costs for medical care systems to maintain hospitals/ERs/ambulatory clinics/diagnostic and therapeutic capabilities, etc.

IMMEDIATE CHALLENGES

- × Maintain/create best care
- × Customers as partners – design & learning partners
- × Coordinate care as well as provide care
- × R & D
- × Pricing

UBER COMES TO HEALTHCARE

- × Survival during the transition
- × Ultimately lower cost to consumer
- × Global healthcare
- × Care comes to you
- × Need primary care physicians?
- × Bricks and Mortar – ED/trauma, procedure centers, others?
- × Impact of extended life span
- × Ethical considerations
- × Data security and privacy