



ResMed

Putting data to work: Accelerating the recovery from the pandemic

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MedTech Forum 2022 - Barcelona

4 May, 14:15 to 15:05

ResMed: Who we are

- World-leading digital health company with over 16 million 100% cloud-connectable devices
- Innovative designer and manufacturer of award-winning devices and cloud-based software solutions which diagnose, treat, and manage sleep apnea, chronic obstructive pulmonary disease (COPD), and other respiratory conditions
- Designed to improve patient outcomes and quality of life, reduce impact of chronic disease, as well as lower healthcare costs and improve efficiencies for healthcare providers:
 - Tools that allow fewer people to manage more patients
 - Empower patients to track own health outcomes



ResMed is a Global leader in digital health



18.5+ million
patients on AirView™



>16 million
100% cloud connectable devices worldwide



>10.5 billion
nights of medical sleep and respiratory data



2+ million
diagnostic tests processed in the cloud



~100 API
calls per second from integrators



4+ million
patients have signed up for myAir™

With proven solutions, turning data into actionable information

Pioneering *innovation* and providing *clinical evidence* that support better patient outcomes and improved business efficiencies for customers



AirView™



Labor Costs²



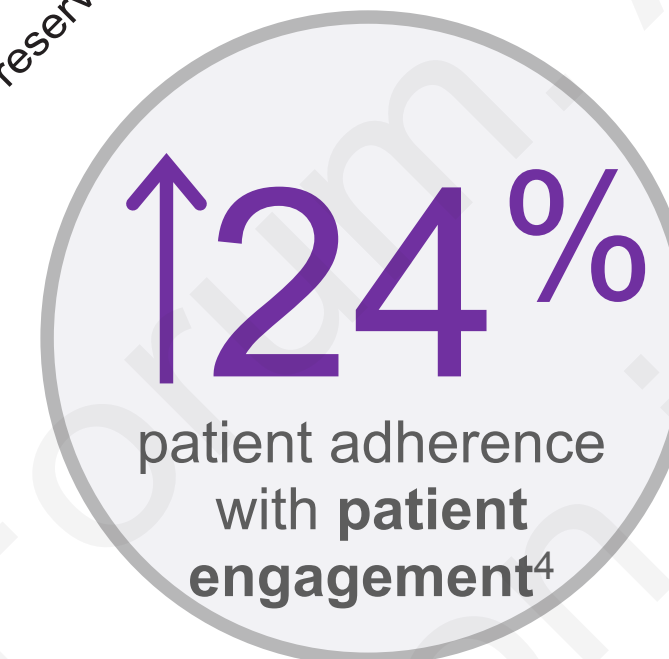
New Patient Setups³



myAir™

World's largest study for adherence

> 128,000 patients



1. Hwang, et al., AJRCCM 2017
2. Munafo, et al. Sleep Breath 2016
3. Data based on monthly patient setups and compliance rates of DME customers from February 2014 – March 2015. Historical results for this provider over the stated time
4. Malhotra et al CHEST 2018

Leveraging our scale can enable a shift to proactive intervention

With more than 10.5 billion nights of therapy usage data we have a unique ability to create actionable insights:

Now

For Patients

- Coaching and usage help in context through myAir app

For Providers

- Patient management by exception, streamlined workflows, lower costs, higher adherence, and increased revenue

For Payors

- Increased patient adherence and improved ROI on therapy

Next

For Patients

- **Personalized** coaching in myAir based on ML

For Providers

- Patient management by **prediction**

For Payors

- **Proof** that it pays to find and treat sleep apnea patients; improved patient management with PROMs

Benefitting all stakeholders with better outcomes and lower costs

Which is critical in addressing the impact of Chronic disease, as the largest driver of healthcare spending in developed economies

Sleep apnea

- **Leading indicator**, and a contributing factor, to many chronic illnesses
- More than **80% undiagnosed**
- Demonstrated positive dose-response relationship between **CPAP usage and lower healthcare costs**

COPD

- Largely undiagnosed COPD sufferers in high-growth markets such as China, India, Brazil, and E. Europe >100M²
- Acute treatment costs to healthcare systems are large
 - Europe: €48B per year⁴
 - U.S.: ~\$50B per year⁵
- More than 3M people worldwide die each year due to COPD¹

Asthma

- Significant opportunity to improve adherence and improve patient-physician interaction
- Leveraging Propeller for increased data related to symptom occurrence and acute triggers
- Opportunity to partner with patients, providers, pharmaceutical companies, and payors to drive improved quality of life

Total addressable patients

936M sleep apnea patients

380M COPD patients^{2,3}

330M asthma patients⁶

Well-positioned to expand proactive treatment of chronic diseases

¹World Health Organization. The top 10 causes of death: Fact sheet: No310 (2014, May) accessed 20Jul16 ² <https://www.ncbi.nlm.nih.gov/pubmed/26755942> ³ Company estimates based on World Health Organization estimates and Zhong et al. "Prevalence of Chronic Obstructive Pulmonary Disease in China" *Respiratory and Critical Care* ⁴ European Respiratory Society, *European Lung White Book* <http://www.erswhitebook.org/chapters/the-economic-burden-of-lung-disease/> accessed 20Jul16 ⁵ Guarascio et al. Dove Med Press, 2013 Jun 17 ⁶ World Health Organization. Chronic obstructive pulmonary disease (COPD): Fact sheet No315. 2015 accessed 20Jul16

What is required is an enabling framework to unlock the full potential of digital health

Three key enablers that will support the adoption of digital health across the EU:

1. Facilitate access to health data for research and innovation
2. Establish an internationally-aligned, harmonized and clear regulatory framework enabling data and AI-driven models of care and interoperability of DHTs across healthcare systems
3. Adopt Digital Health reimbursement models in EU Member States

The newly proposed EHDS is providing the starting points for addressing these challenges, but we need to ensure it is able to address them fully