

# Leadership: Monitoring and IT

Steve Rusckowski

*December 5, 2001*

*Let's make things better.*



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**Holy Family Hospital**  
**Methuen, MA USA**

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# What is Patient Monitoring

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# Patient Monitoring *for every point of care*

**at the  
patient's  
side**



**at the  
central  
station**

**Captures and analyzes patient's  
vital information for clinical decision makers**

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# Patient Monitoring

## At the patient's side

- A patient monitor displays, analyzes, documents and transmits a patient's life sustaining vital signs such as pulse rate, ECG wave, blood pressure, and other key body measurements for assessment, diagnosis and treatment



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# Patient Monitoring

## Central monitoring

- At a glance, clinicians see important information about their patients without walking to each bed, helping them to be more cost efficient in their care of patients. When a patient is in distress, an alarm sounds at the bedside and central to alert the staff



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# A Monitoring Solution for Every Patient



**Emergency**



**Sub-Acute**



**Cardiac and  
Critical Care**



**Obstetrics**



**Anesthesia**



**Neonatal and  
Pediatrics**



**Home**

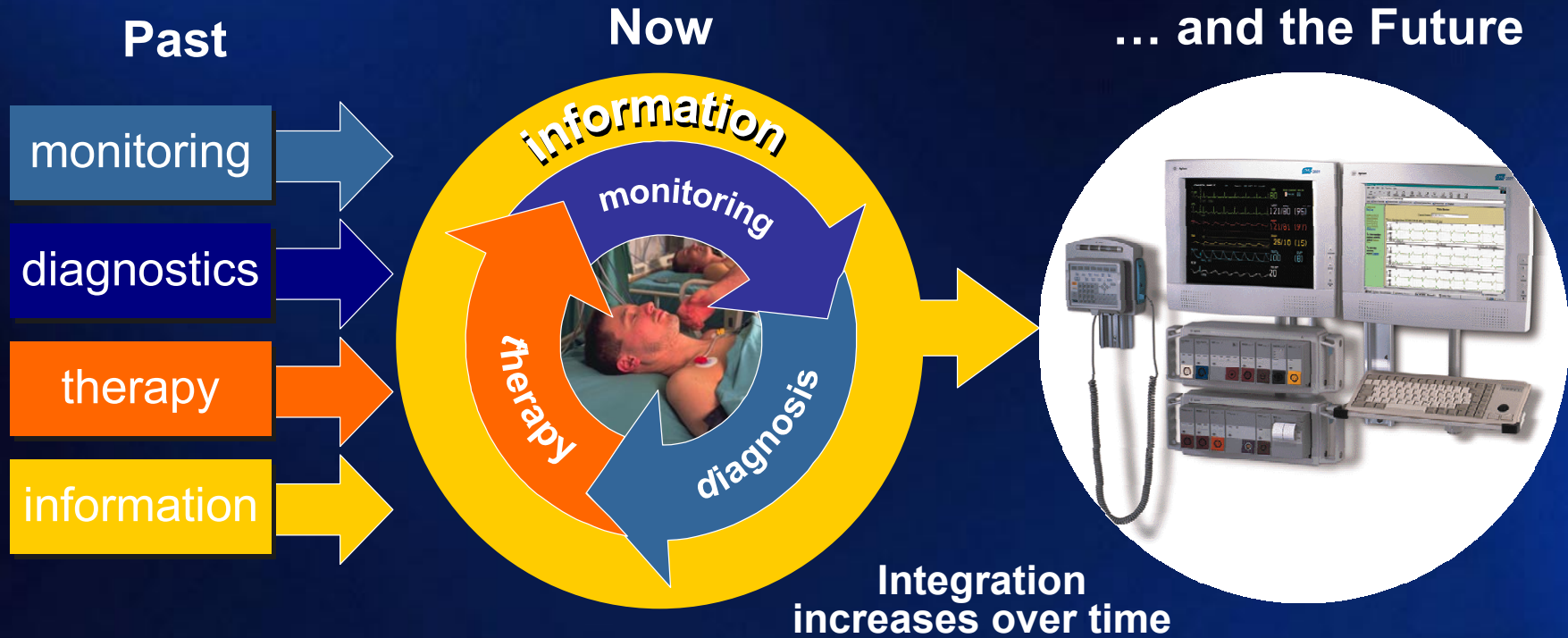
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# Electromedical Markets are Evolving

Improved, more-cost effective care  
through enhanced decision support



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# Market Size & Growth

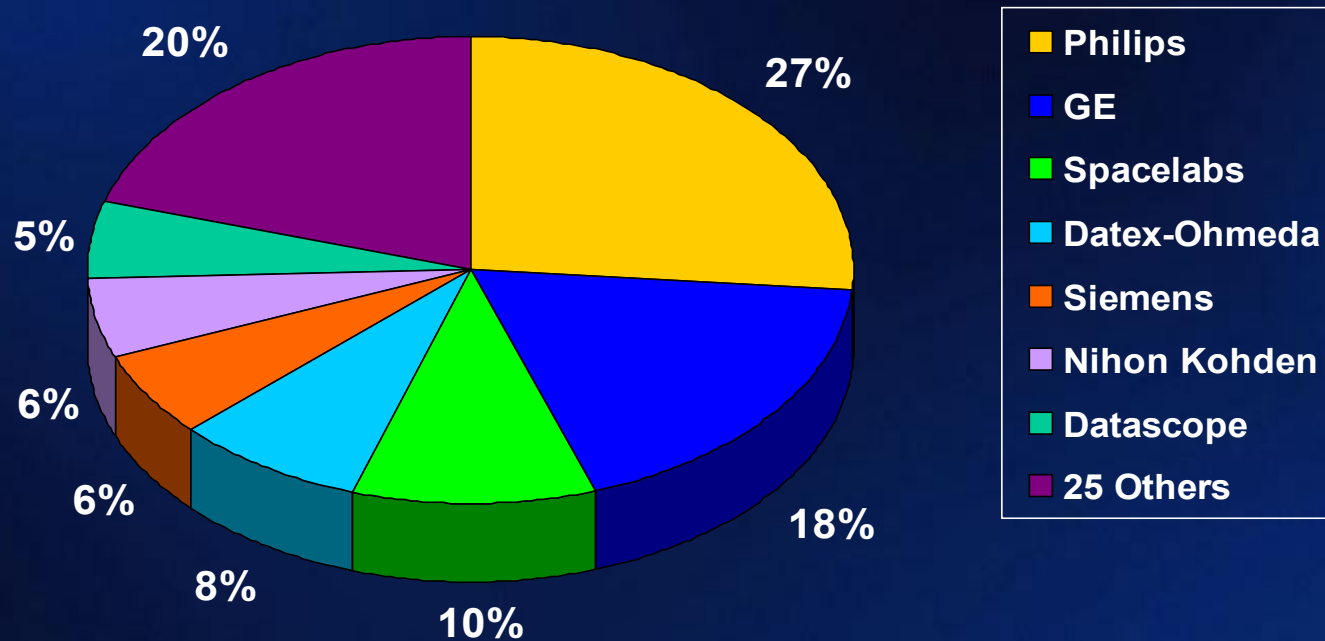
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# Worldwide Market Share

Patient Monitoring Market (**excluding CIS**) -- WW selected countries\*



Market size 2000 ex CIS: \$ 1780 mln  
Annual Growth: 4 - 5%

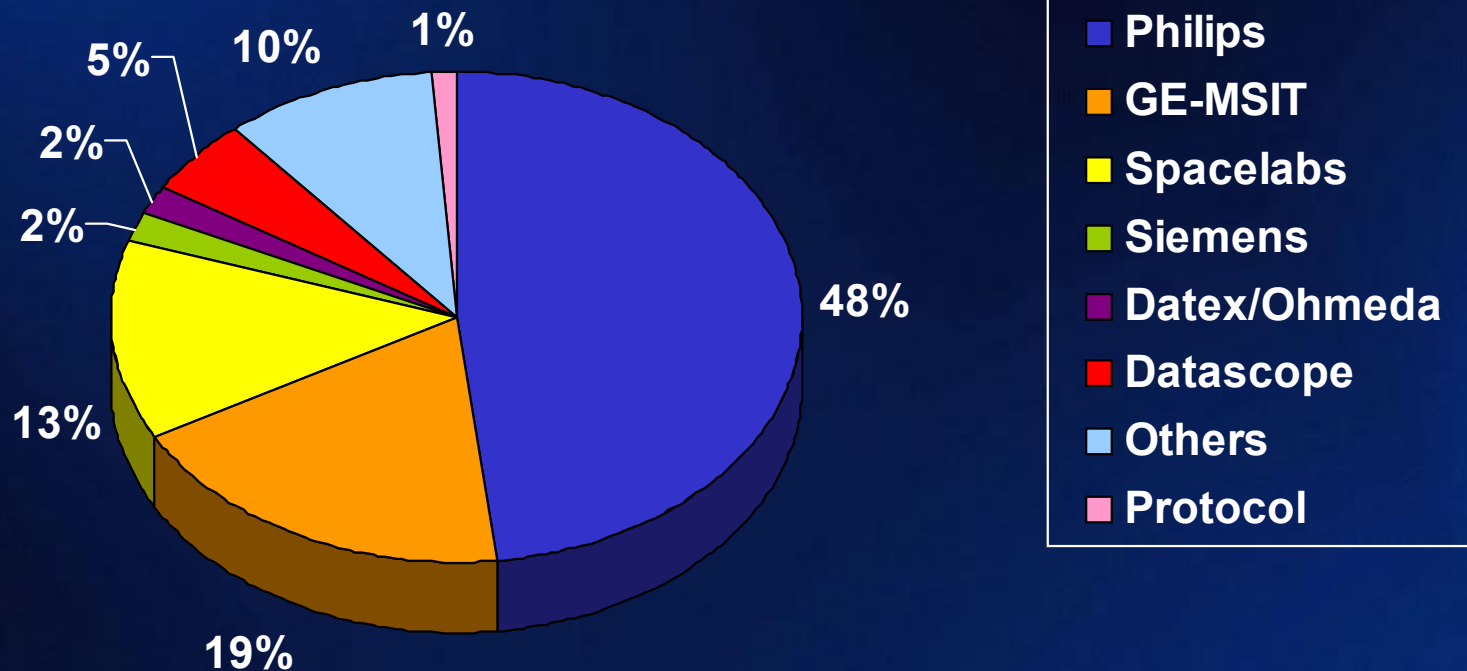
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# US Installed Base - Hospital Patient Monitors

Philips 48% of total US installed patient monitors



Source: 2000 MSP Reality Monitoring Database and Survey

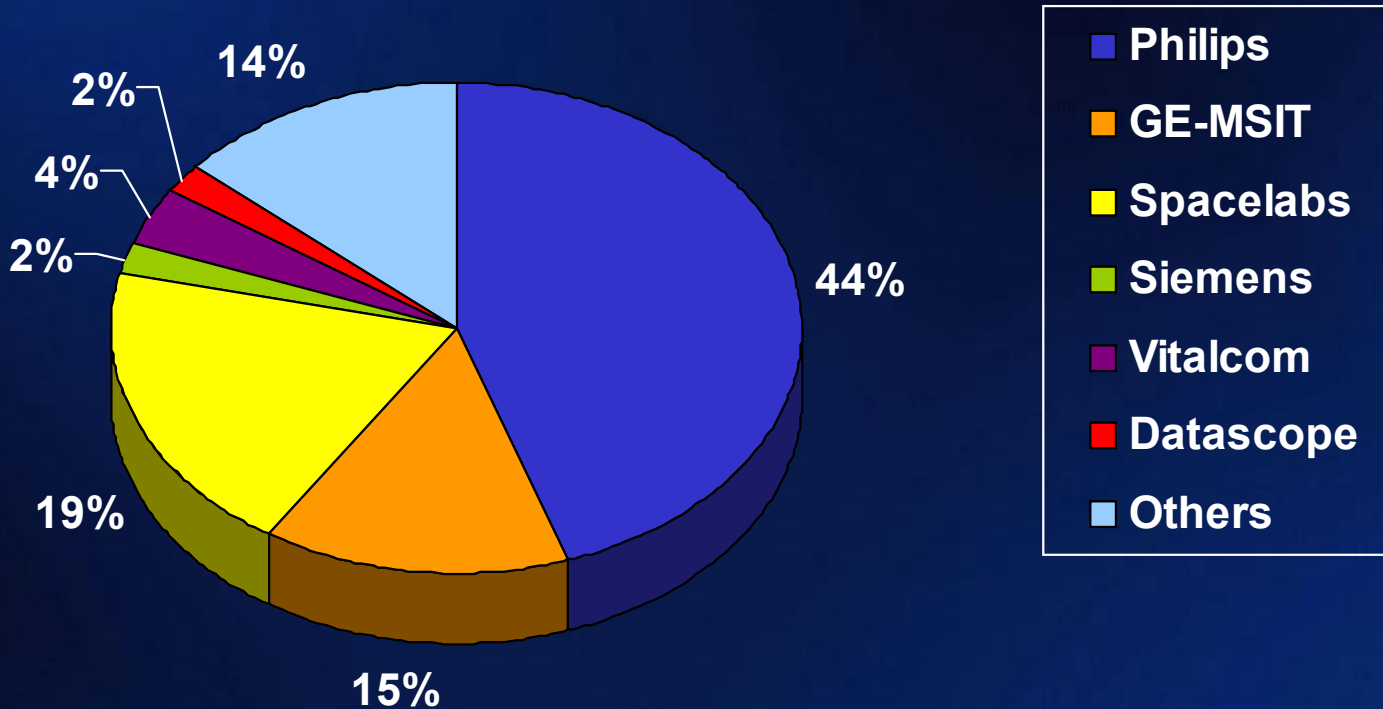
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# US Installed Base - Telemetry Units

Philips 46% of total US installed telemetry units  
- the market's fastest growing segment!



Source: 2000 MSP Reality Monitoring Database and Survey

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# Philips vs. Competition

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# Cardiac & Monitoring Systems

**#1** in adult critical care

**#1** in cardiac care and telemetry

**#1** in obstetrical care

**#1** in neonatal & pediatric care

**#1** in AED's

**#1** in customer support

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# Third Party Competitive Comparison

	Philips	GE	Siemens
U.S. Installed Base '99*	44%	14%	2%
Product Reputation (1-10)*	8.3	8.1	8.7
Quality Reputation (1-10)*	9.0	8.4	8.7
Customer Service Satisfaction	#1	#2	
Breadth of Product Line	#1	#2	No Fetal Monitors

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# Winning on Clinical Excellence in Cardiac & Monitoring

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# Why do People buy from Philips?

Philips' "Monitor For Life" philosophy is unique in the industry.

It has helped us maintain our leadership in patient monitoring by allowing customers to upgrade their monitors with the latest capabilities, independent of the original purchase date. It enables customers to keep their technology state-of-the-art AND protect their investment.



***This is the industry's only "Monitor For Life"***

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# “Monitor for life” based on superior Technologies

- Unique Modular Approach
- Forward and backward compatibility
- Unique measurements and algorithms

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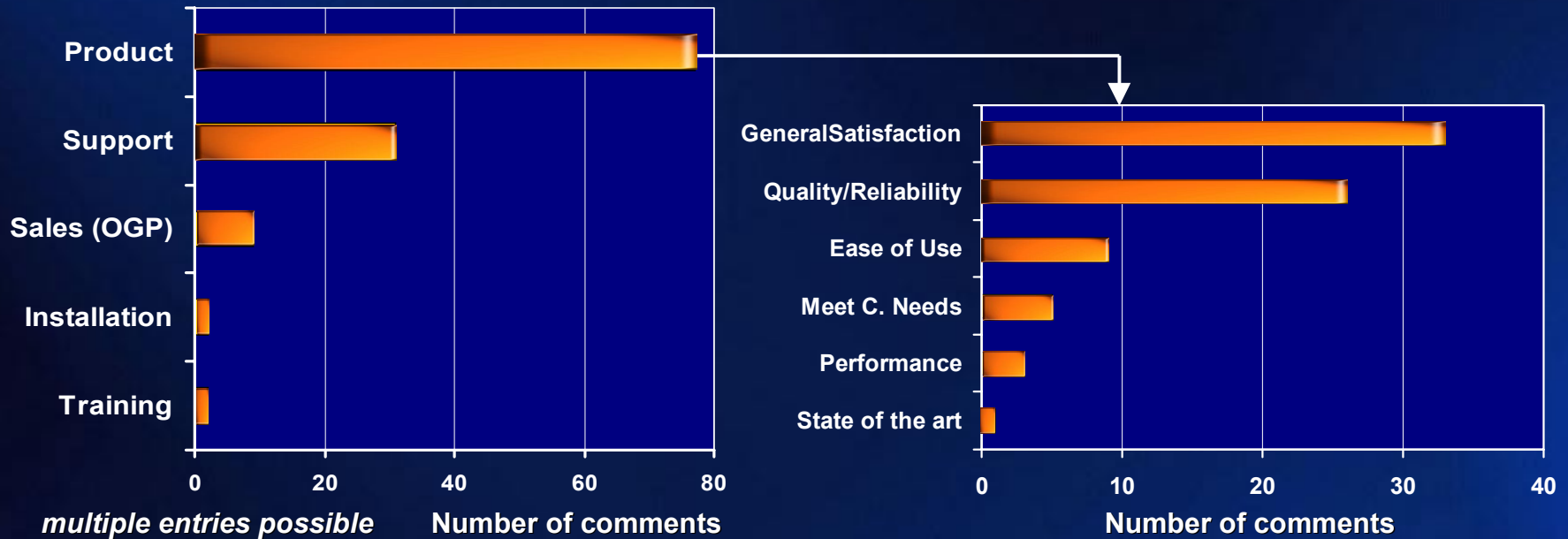


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# New Owner Survey Summary

U.S.: Reasons for Customer Loyalty, Q2 FY2001  
*Question: Why did you choose Philips (Agilent)?*

Nr. of people surveyed: 257



***Undisputed leader for quality and reliability!***

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# Bringing Information to Where Decisions are Made...



Web

Wired

Wireless

*Complete patient information, when and where needed*

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# Information Technologies

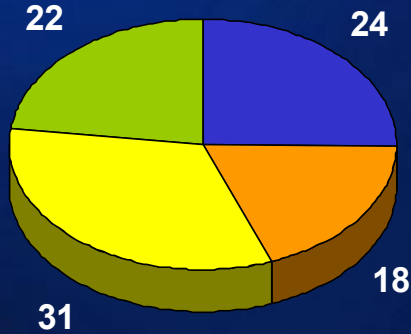
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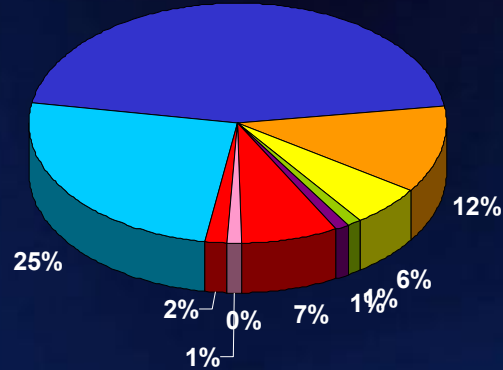
# Worldwide Healthcare IT Market 2001

\$ 95 Bln Total Market



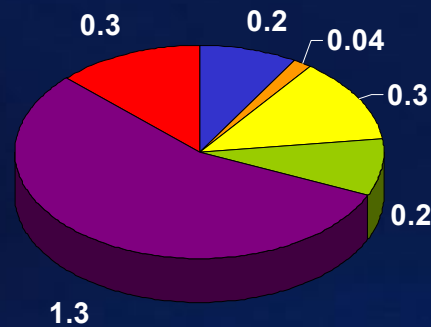
- Hardware
- Software
- External Services
- Internal Services

\$ 18 Bln Software Market



- Administration
- Practice Gdn
- LIS
- PHIS
- RIS
- R-PACS
- CIS
- C-PACS
- Critical Care
- Generic Software

\$ 2.3 Bln Philips Addressable Market



- Radiology Info Sys
- Cardiology IT
- Acute Care
- C-PACS
- R-PACS
- Imaging Workstation

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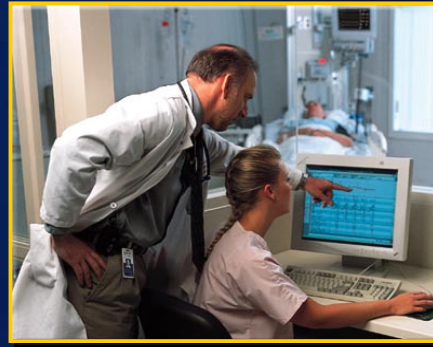


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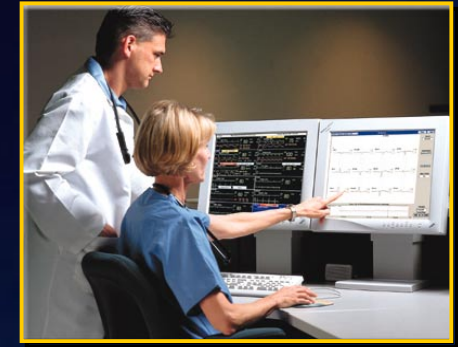
# Current Clinical Systems ...



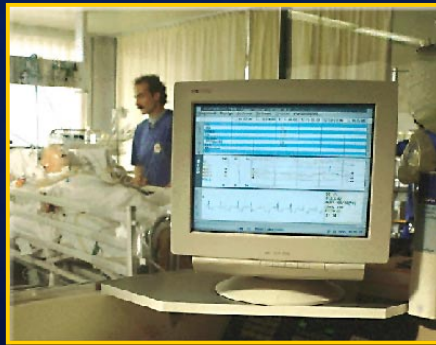
CompuRecord



CareVue



Information Center



Documentation Center



OB TraceVue

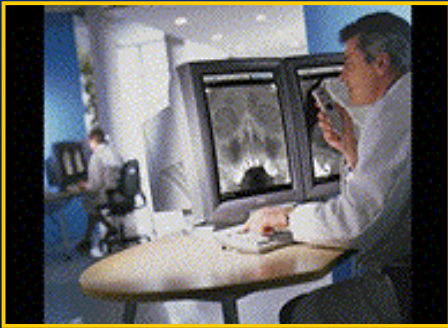
***All web-enabled - an industry first!***

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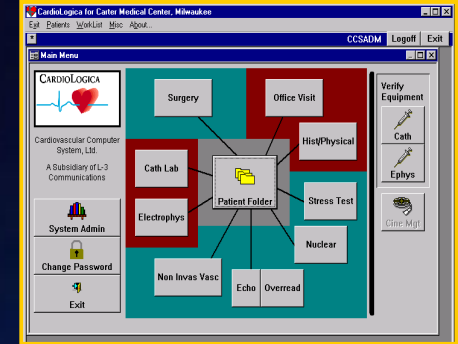
# ... and Imaging Processing and Picture Archiving & Communications Systems (PACS)



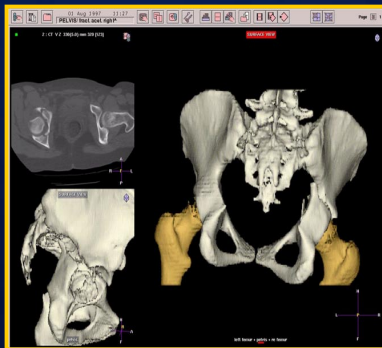
Inturis for Radiology



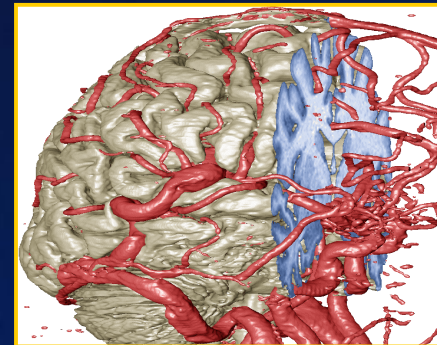
Inturis for Cardiology



Cathworks,



EasyVision



*From a single workstation to multiple hospitals and the home*

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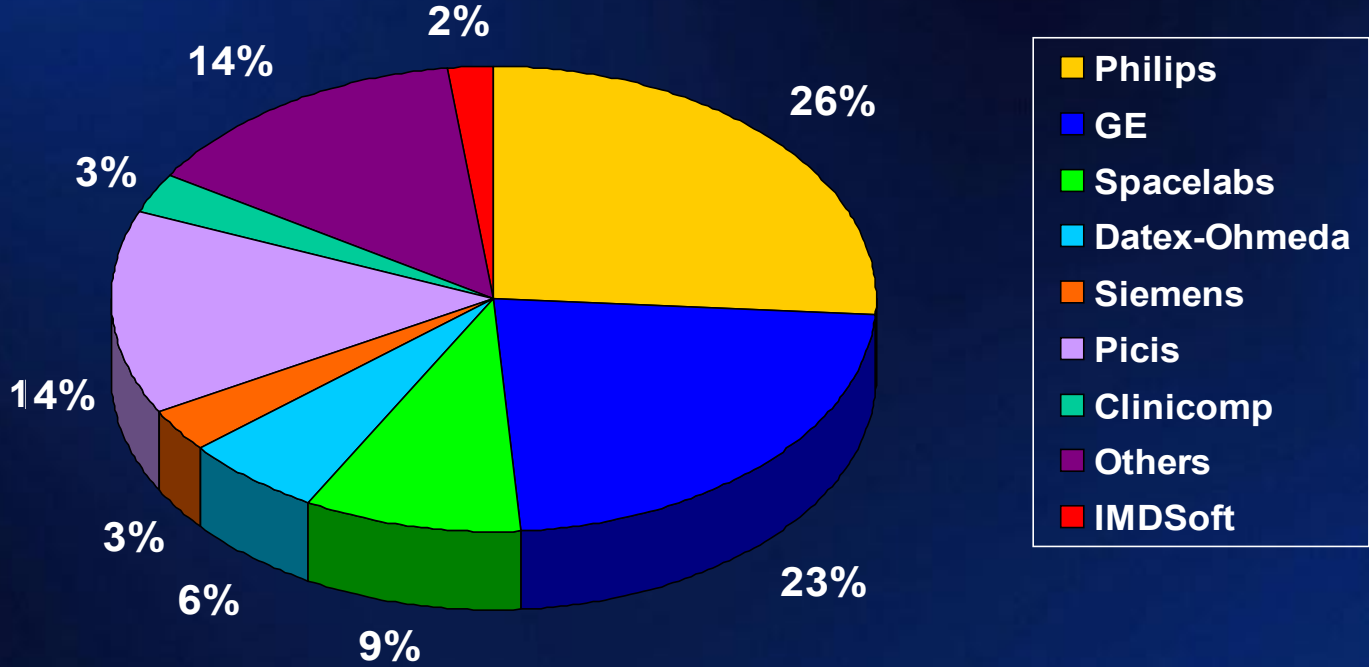


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# Worldwide Market Share

Clinical Information System Market (CIS) -- WW selected countries\*



Market size 2000\*: \$ 245 mln  
Annual Growth: 5 - 10%

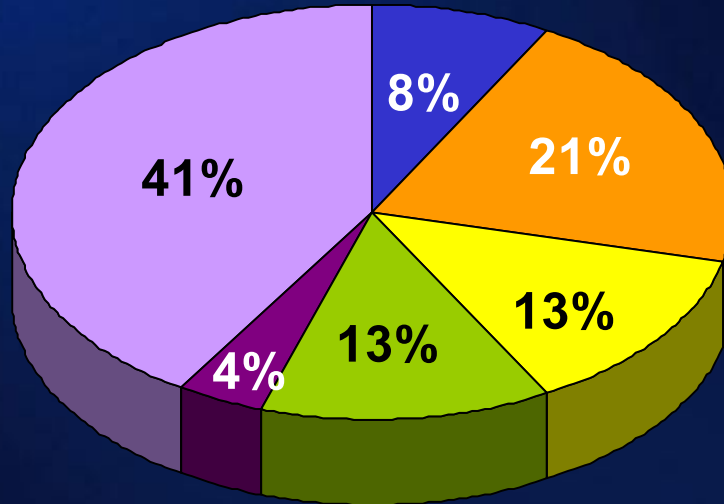
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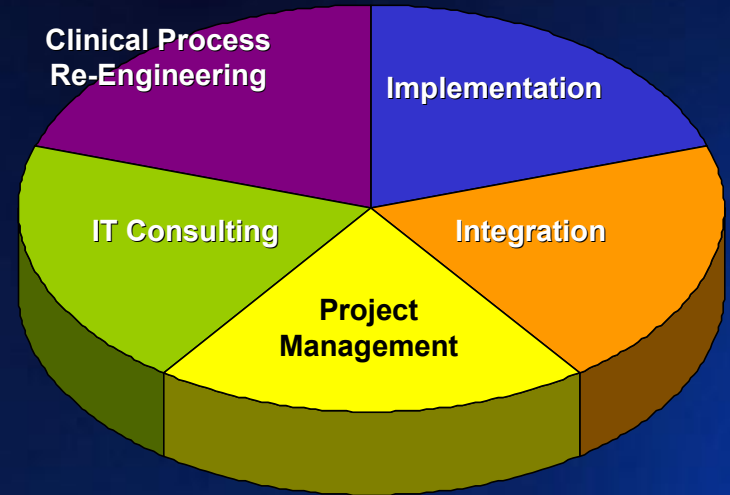
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# Philips IT Market & Performance

## Medical Imaging IT



## Philips Professional Services



**#1** Cardiology PACS

**#1** Critical Care Information Systems

**#1** PACS Vendor Ranking (Klass Report)

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# Summary

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# Summary: Cardiac, Monitoring & Information Systems Leadership

- **World's largest & most satisfied installed base**
- **Philips market share will increase while market consolidates**
- **Innovation in migration, quality & information systems will drive our growth**

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