

# Fiber-to-the-Home Council North America

TAP INTO THE MOST VALUABLE BROADBAND RESOURCE AVAILABLE



Building Fiber-to-the-Home  
Communities **Together**



# Emerging Opportunities for Healthcare Services Over Fiber

Attract & better  
serve these ...



for the cost of these!



## A New Category of Subscriber & Resident Services

# Emerging Opportunities for Healthcare Services Over Fiber

## Agenda

The Need

The Demand

The Services

Deployment Practices

Revenue Streams and Model

Q & A

Survey Q1

# The Need

## Health Benefit

- ✓ Access. Access. Access.
- ✓ Avoid incorrect self-diagnosis
- ✓ Overwhelming generic, biased info online, on tv, in mag's



## Emotional Benefit

- ✓ Avoid Anxiety, "what do I do next?"
- ✓ Enhanced communication with family & friends



## Financial Benefit

- ✓ Reduce out-of-pocket spending by consumers on h & w costs
- ✓ Travel Time and Cost Savings
- ✓ Research time reduced
- ✓ Work time
- ✓ Inappropriate purchase of health products & services



# The Need

*“The **time you have with your doctor is getting progressively shorter**, yet there’s so much more to talk about. “*

*Dr. Marisa Weiss, founder, breastcancer.org*

*“The daily bombardment of news reports and drug advertising offers little guidance on how to make sense of self-proclaimed medical breakthroughs and claims of worrisome risks. And **doctors**, the people best equipped to guide us through these murky waters, are **finding themselves with less time to spend with their patients.**”*

*NY Times, “You’re Sick. Now What? Knowledge is Power”, T. Parker-Pope, 9/30/08*

*“As one of consumers’ touch points for many home-based services, **service providers will have to make this strategic investment.**”*

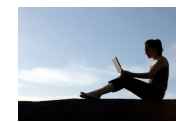
*Harry Wang, Parks Associates, e-Health Opportunities for Global Service Providers, 8/2008*

# The Growing Demand



## Consumers

- ✓ **146 million (81%)** online health info search
- ✓ **8 million** conduct online health search everyday
- ✓ **78% of consumers** want to interact with doctor online
- ✓ **70% of consumers** likely to video-conf w/doc if available
- ✓ **#1 non-entertainment application for 55+**
- ✓ **16% of video-game market**

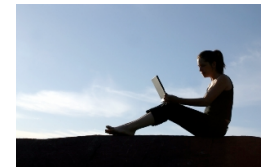


# The Growing Demand



## **Chronic Disease & Caregiving**

- Growing Exponentially
- Requires Complex Care
- 45% of US households w/ I chronic disease sufferer
- 59% of residents are, or expect to be, caregiver
- Physical and Mental Health co-exist
- Children, Boomers, Elderly Care benefits

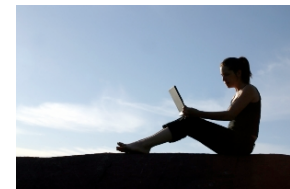


# The Growing Demand



## ***Municipal Employer Trends***

- Increasing HC costs
- Rising Premiums & Declining Coverage
- Absenteeism and Presentee-ism
- Emphasis on Prevention & Wellness



## ***Healthcare System Trends***

- Doctor & Nurse Shortage
- Wider-scale reimbursement
- Pay-for-Performance
- Impact of New Administration



Survey Q2



# Increasing Investment



- Large players (Intel, Philips, Honeywell)
- Nike/iPod, Wii Fit, Fitness Equipment Mftrs
- Microsoft, Google, Yahoo
- Apple, Nokia, Motorola, QUALCOMM
- Municipalities and Fortune 1000 employers



# The Future. Today.



“Service providers are in a **unique, once-in-a-lifetime position** to enter and service this growing service industry. The home will be the central location in the new preventative care model in healthcare applications, with broadband enabling home medical services, telemedicine applications and patient monitoring”

*Harry Wang, Parks Associates, e-Health Opportunities for Global Service Providers, 8/2008*

**“Patient acceptance is never an obstacle to telemedicine”**

*UC Davis Health System Center for Health and Technology, May 2007, after 15,000 video-consultations*

**“all homes will be equipped with virtual health agents**

to screen for disease by 2015.”

*- PriceWaterhouseCoopers*

*“ . . it is only a matter of time before **private tele-psychiatry visits** with patients in the privacy of home **will become commonplace”**,*

*iHealthBeat / California Healthcare Foundation Special Report  
Psychiatric Telemedicine Helps Bring Relief To Shortage of Mental Health Professionals, 9/30/08*



# An Amenity for Today's Families

- Improved **access to medical experts**
- Personal, **Electronic Health Record**
- From **Childcare** to **Eldercare**
- Vital Sign, Medication and Activity **Monitoring**
- Collaboration, **Scheduling** and Messaging
- **In-Home** (1st & 2nd), At Office, Mobile service delivery
- **Consumer Electronics-Based** (cell phone, tv, broadband, STB, gaming consoles)
- **Telemedicine**

Survey Q3

# Health and Wellness Services

## **Concierge Healthcare Services** **(\$0 - \$200 / mo)**

- Video-consultations with doctors
- Chronic Disease Management
- Personalized Healthy Living & Wellness programs
- Supplies & Equipment
- Educational Video's On Demand
- Medication Management
- Care Coordination
- DNA Testing / Predictive Modeling

# Health and Wellness Services

## **Monitoring (\$29 - \$199 / mo)**

- Eldercare
- Personal Emergency Response Systems (PERS)
- Vital Sign (weight, BP, cholesterol, glucose, pulse ox)
- Medication
- Activity
- Cognitive Decline

# Health and Wellness Services

## **Online Services (Free - \$299)**

- Health Information / Education (general, research)
- Health Ratings / Physician Locator
- Fitness and Nutrition Programs
- Personal Health Records
- Support Groups / Community (patient sites, disease-specific)
- E-commerce
- Health/Risk Assessments, Tools

# Health and Wellness Services

## **Chronic Disease / Lifestyle Management** **(\$1 - \$89 per month)**

- Diabetes
- Obesity / Weight Management
- Heart Health
- Women's Health
- Mental Health

# Why Offer It

- **Competitive** Differentiation (vs local, commoditization)
- **Revenue** Generation (\$20 - \$500 / resident)
- Another answer to “**Why fiber?**”
- **Lifestyle** Enhancement
- **Recoup** Network Investment **Faster**
- Meet residents’ **most important need**
- Drive high-bandwidth **bundle uptake**

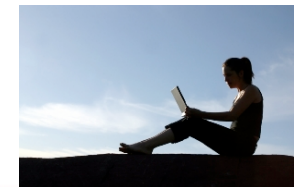
Survey Q4

# Liability & Risk Management

- Market, Carrier Precedence
- Vendor Agreements *(limits of liab, hold harmless, regulatory understanding)*
- HIPAA
- Privacy / Security
- Vendor/Subscriber License Agreements
- Waiver Prompts

# How To Deploy

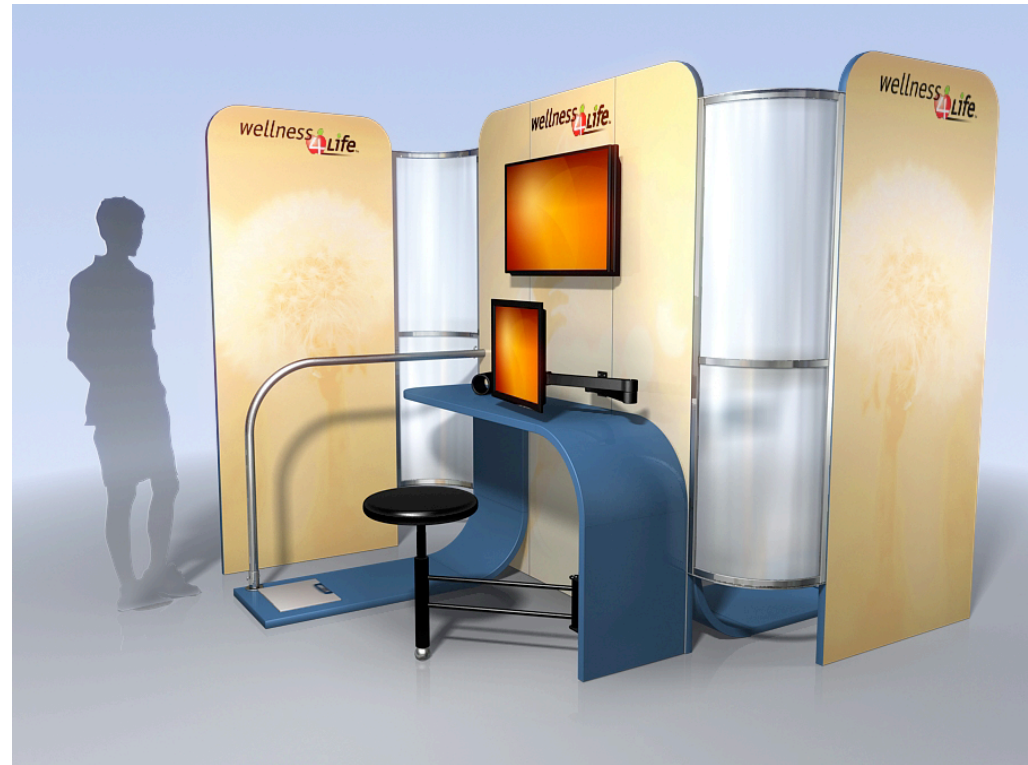
- Local Loop Integration
- Community/Resident Web Portal
- Communication/Amenity Services Portal
- IPTV or Cable TV channel
- Video On Demand
- Individual subscription upgrade
- Health Services Kiosk



# How You Make \$ in '09

- **Margin on IPTV/Cable Channel**
- **High-Speed Package Incentives** (ie higher speed broadband packages, upgrade incentive, “Family Connect” bundle)
- **Wireless / Data Plan Usage Royalties**
- **Revenue share on each video-consult**
- **Referral Payment or Resale Margin on each subscription**
- **Revenue share on advertising and e-commerce**
- **Supplies and Equipment commissions**

# Community Health Services Kiosks



# Dynamic, Personalized User-Interfaces



For delivery of:

- ✓ Healthcare Services
- ✓ Energy Management
- ✓ Entertainment
- ✓ News & Announcements
- ✓ e-Gov Services

# How You Make \$ in '09

Service	Mo. Cost to Provider	Mo. Cost to Subscriber	Annual Rev to Provider	Proj. Units Year 1	Total Net Rev To Provider
Healthcare TV	\$3	\$4.99	\$24	500	\$18,000
Advertising & E-commerce	\$0	\$0	\$1,000	1	\$1,000
Pay-Per-Video Consults	\$0	\$75 - \$199	\$60	100	\$6,000
Activity Monitoring Service	\$0	\$79.99	\$120	75	\$9,000
Diabetes Management Svc	\$0	\$29.99	\$100	50	\$5,000
Top Tier Concierge Healthcare Svc	\$0	\$179.95	\$250	25	\$6,250
Fully-Integrated Home	\$0	\$5,999	\$500	10	\$5,000
Sell Units & Packages Faster					variable
PR / Marketing Exposure					variable
<b>Total Net ROI to Municipality</b>					<b>\$50,250</b>

**279% ROI**

**ARPU = \$50.25**

Survey Q5

# Custom Health Services Assessment

- **Free** for Qualified Municipalities
- Branded **Survey** of Residents / Network Subscribers
- **"Demand Defined"**: Evaluate Health Services Readiness Among Residents, Employers & Agencies
- Corresponding **Risk Profile** & **Market Analysis**
- **Technical Specifications** Recommendations



**[rob@medconcierge.com](mailto:rob@medconcierge.com)**;  
**(781) 953-9649**

# Q & A

---

Fire  
Away!

# Emerging Opportunities for Healthcare Services Over Fiber

Attract & better  
serve these ...



for the cost of these!



## THANK YOU!

# Emerging Opportunities for Healthcare Services Over Fiber

Rob Scheschareg

[rob@medconcierge.com](mailto:rob@medconcierge.com)

(781) 953-9649