

MEDICAL MARKET UK

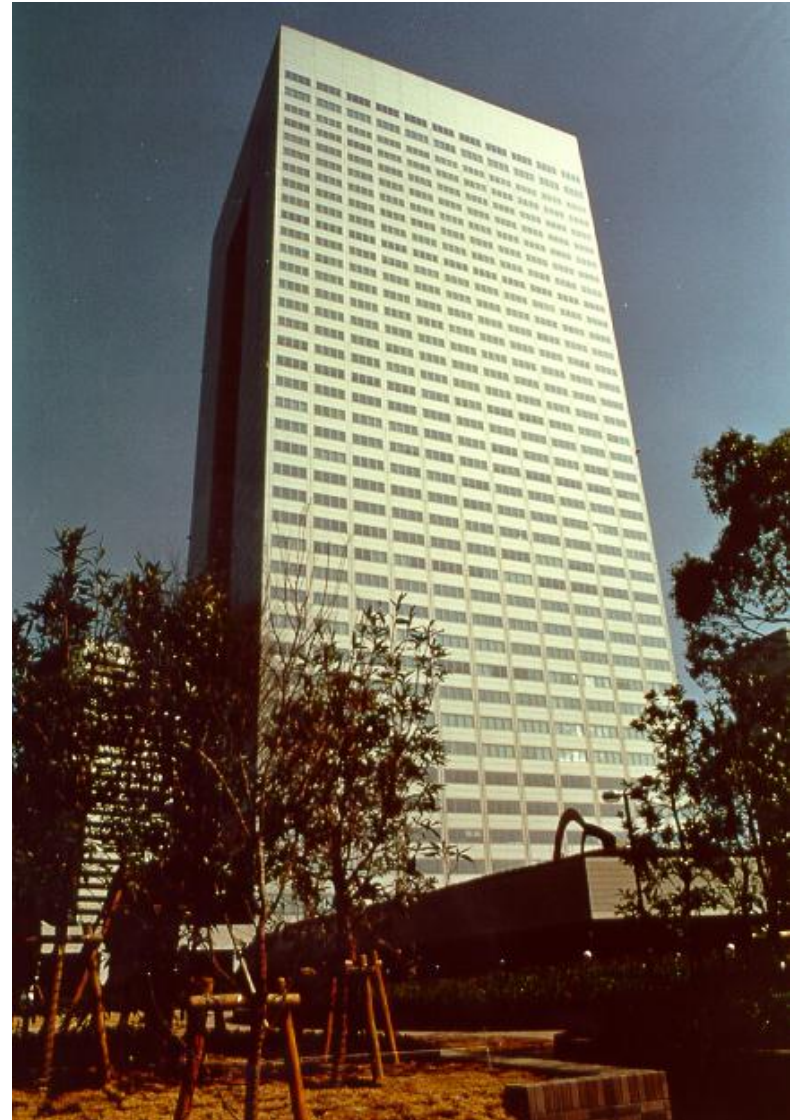
TOSHIBA MEDICAL SYSTEMS PERSPECTIVE



WHO ARE TOSHIBA MEDICAL SYSTEMS UK?

Toshiba Corporation – Key Facts

- » One of the world's top 10 industrial companies
Turn-over \$78bn
- » And \$3.3bn net profit 2010-11
- » Electrical and power-engineering
- » Committed to people and committed to the future
 - » R&D-based Innovation
 - » Environmental commitment



Business Areas

Digital Products

■ Mobile Comm

- Cellular Phones

■ Digital Media Network

- HDD, ODD
- LCD TV
- DVD/ HD DVD Recorder/Player
- Mobile Audio Player
- Projector, etc.

■ PC & Network

- Portable PC
- Server, etc.

■ Toshiba TEC

- Copiers
- POS System, etc.

Electronic Devices

■ Semiconductors

- NAND Flash memories
- System LSI

■ Display Devices & Components

- Development of Fuel Cell etc.

■ Toshiba Matsushita Display Technology

- Low Temperature Polysilicon TFT LCD
- Amorphous Silicon TFT, etc.

Social Infrastructure

■ Power Systems

- Power Plant
- Nuclear Power Station
- A Power Turbine, etc.

■ Industrial Systems

- Shinkansen
- Automatic Letter Processing Systems, etc.

■ Social Infrastructure Systems

- Road Traffic Control Systems
- Broadcasting Systems
- Radar Systems
- Automatic Letter Processing Systems, etc.

■ Toshiba Elevator and Building Systems

■ Toshiba Solutions

■ Toshiba Medical Systems

■ Westinghouse Electric Company

Home Appliances

■ Toshiba Consumer Marketing Co.

- White Goods
- Air Conditioners
- Fluorescent Lights
- Primary Batteries, etc.

Others

■ Network Services & Components

- Web Service
- Intelligent Traffic Systems
- Mobile Broadcasting, etc.

Power Systems

Power Turbine



Combined Cycle Power Plant



Nuclear Power Station



Gas Insulated Switchgear

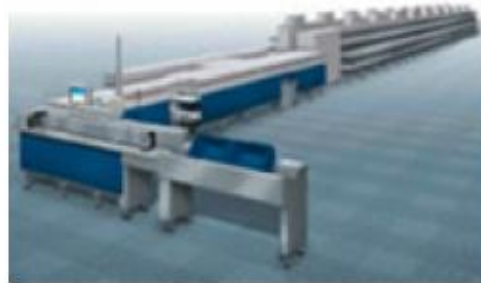


Social Infrastructure

Shinkansen



Automatic Letter Processing Systems



Face Recognition Access Control System



Elevator 1000m/min



Medical Systems



Broadcasting System



Airport Control System



TOSHIBA
Leading Innovation >>>

CT Scanners

ONE
Aquilion[™]
ViSION EDITION



TOSHIBA
Leading Innovation >>>

Ultrasound Scanners



MRI Scanners



Bespoke Planning & Design



TOSHIBA
Leading Innovation >>>

XRAY Systems







UK Market Situation

BIG PICTURE

- Market recovering post recession (*source ; AXREM*)
- Private sector starts to invest (BMI Health, InHealth, Spire)
- NHS has to save £20billion by 2015 (already £5bn achieved in 2011 and 2012*)
- Many NHS hospitals running into 'overspend' situation

PRESSURE POINTS

- Patient activity continues to grow ~ 7% per year
 - Our installed systems are more heavily utilised
 - Increasing installed base age profile
 - Shift to 'any qualified provider' drives private market
-
- Opportunity : increased patient activity and increased spending next 5 years

The Landscape



**UK NHS (90% OF THE MARKET) STILL HAS A
BUDGET OF £100BN PER YEAR**

PRIVATE SECTOR ALSO GROWING

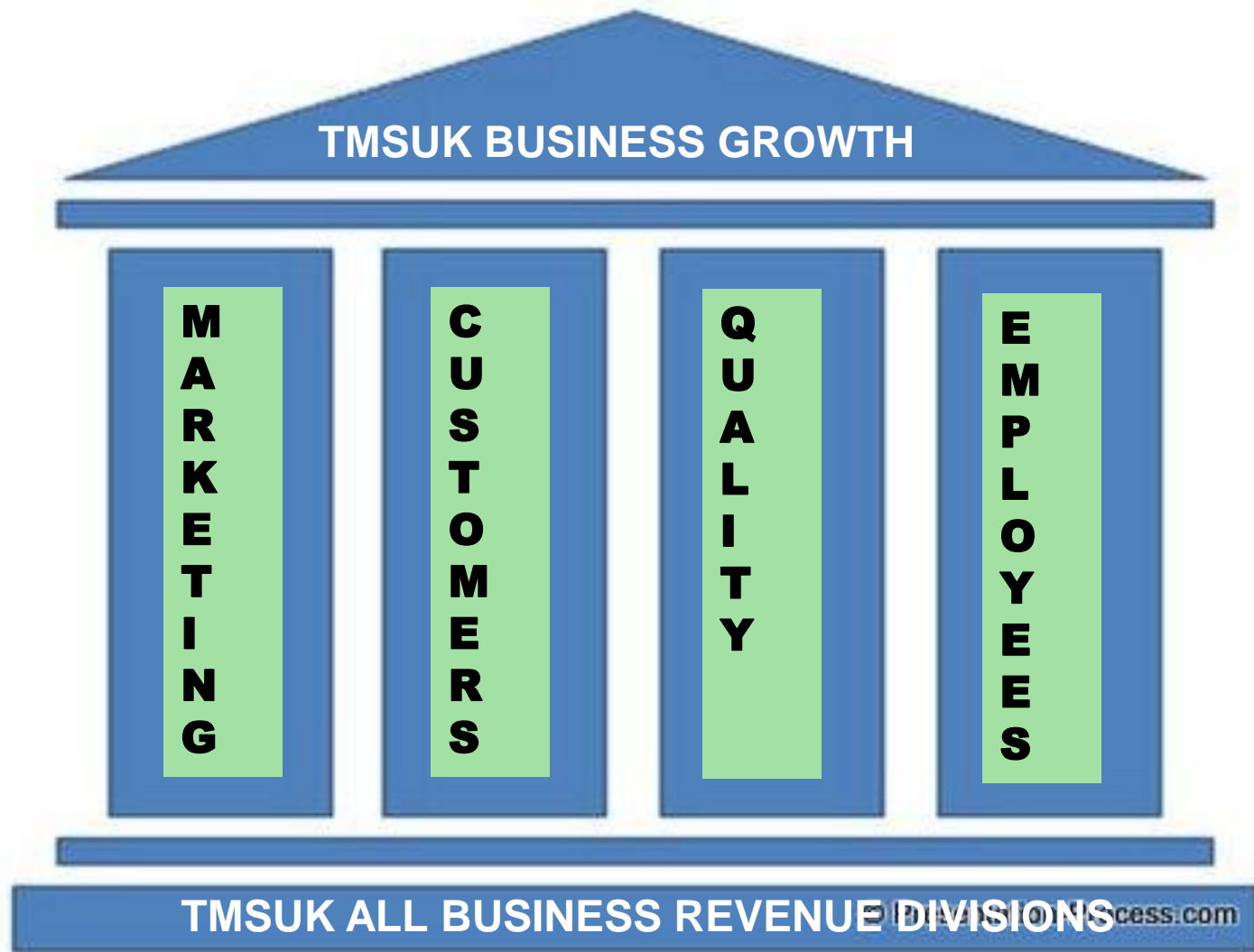
A GOOD STRATEGY IS KEY, AND QUALITY IS KING

Overall strategy (5 years)

**Be the best employer and
be the best customer partner
in this sector**

**Goal seeking towards 50% growth
By 2017**

Strategic Pillars



CONTENT AND MOTIVATED STAFF DEFINE YOU

Summary Findings – All Toshiba



Customer Satisfaction



Gather data via
independent survey

Drive improvements

Respond to what
customers want

Audit results 1 year later

**‘The best customer
partner in this
sector’**

Customer Satisfaction Survey 2012

OUR PEOPLE

- ♥ 94% satisfied or very satisfied with the people at Toshiba
- ♥ 91% satisfied or very satisfied with the service to our customers
- ♥ 100% of all customers were satisfied with Toshiba's engineers

2 out of 3
associate Toshiba
with 'excellent
service to customers'

2 out of 3
believe Toshiba is
better than the
competition

TOP 3 REASONS FOR CUSTOMER SERVICE SATISFACTION:

- ✓ Quick response
- ✓ Helpful and friendly
- ✓ Excellent engineers

"It's about attitude – going the extra mile and doing so proactively and happily"

Radiographer/Sonographer

"Toshiba's culture means they are probably the best company we deal with"

Radiography Manager

OUR PRODUCTS

- 91% satisfied or very satisfied with the products
- 89% say Toshiba's products improved patient care
- 89% likely or very likely to purchase from Toshiba again
- 97% of Radiologists satisfied or very satisfied with ease of use
- 98% of Radiologists satisfied or very satisfied with functionality

TOP 3 REASONS FOR PRODUCT SATISFACTION:

- ✓ Reliability
- ✓ Ease of use
- ✓ Image quality

"Very reliable, user-friendly, fast image reconstruction"

Technical Manager

"Easy to use, excellent image quality, beautifully designed, patient-friendly"

Consultant Radiologist

Highest quality company in this sector



‘Attention to the lowest number of errors, in everything we do, is central to the TMSUK ethos’

ALIGNMENT WITH HIGH QUALITY PARTNERS BRINGS CREDIBILITY

"This is a big,
big signing for us

and probably the most important
step forward we have taken in a
long, long time."

Sir Alex Ferguson, Manager, Manchester Utd

A first for football: in this ground-breaking partnership, Manchester Utd has chosen to work with Toshiba Medical Systems to keep players at the peak of their health and fitness. This means they spend more time playing and less time on the treatment table – which benefits the club, the fans and the world of sports science.



TOSHIBA
Leading Innovation >>>

OFFICIAL MEDICAL SYSTEMS PARTNER

To find out how Toshiba Medical Systems help Man Utd
visit www.toshiba-medical.co.uk/manutd



TOSHIBA
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FROM THE THEATRE OF DREAMS TO THE TRAINING GROUND OF DREAMS

The Toshiba Medical wing in the Trafford Training Ground,
the world's leading Healthcare Showsite, helps keep
Manchester United's players at the peak of fitness.

So they can carry on doing what they do best. Winning.



CONFIDENTIAL



**UK HEALTHCARE CUSTOMERS MUST HAVE
ON-GOING EDUCATION. WE CAN HELP.**

Medical Imaging Academy



- New template for all educational courses
- Leading University hospital affiliation
- Academic faculty Board
- All education CPD accredited



Imaging Academy



- Imaging academy
- Showroom : CT/MR/XR/UL
- Clinical scanning services
- Central London



Research Fellow Funding



Create evidence based outputs on neuro' applications of AQ ONE (new product)

- Health economics
- Dual energy
- 4D Perfusion
- 2 year agreement
- Defined outputs in time



Ultrasound cardiac Research



Clinical Research and Imaging Centre



CRiCBristol home

University Hospitals Bristol
NHS Foundation Trust

CRICBRISTOL

ABOUT

About us

News

RESEARCH

Facilities

Accessing and using
CRiCBristol

People



Clinical Research and Imaging Centre (CRiCBristol)

A cutting edge clinical research facility supporting local, national, and international research.



About us

Find out more [about CRiCBristol](#), and take a [video tour](#)

Find out more about volunteering

- Loan of Aplio 500 for 3 years
- Research congenital heart defects in children while exercising
- Partner with Man Utd for elite athlete children database
- Showcase cardiac optimised US system from Toshiba

SUMMARY

IF YOU COMMIT TO :

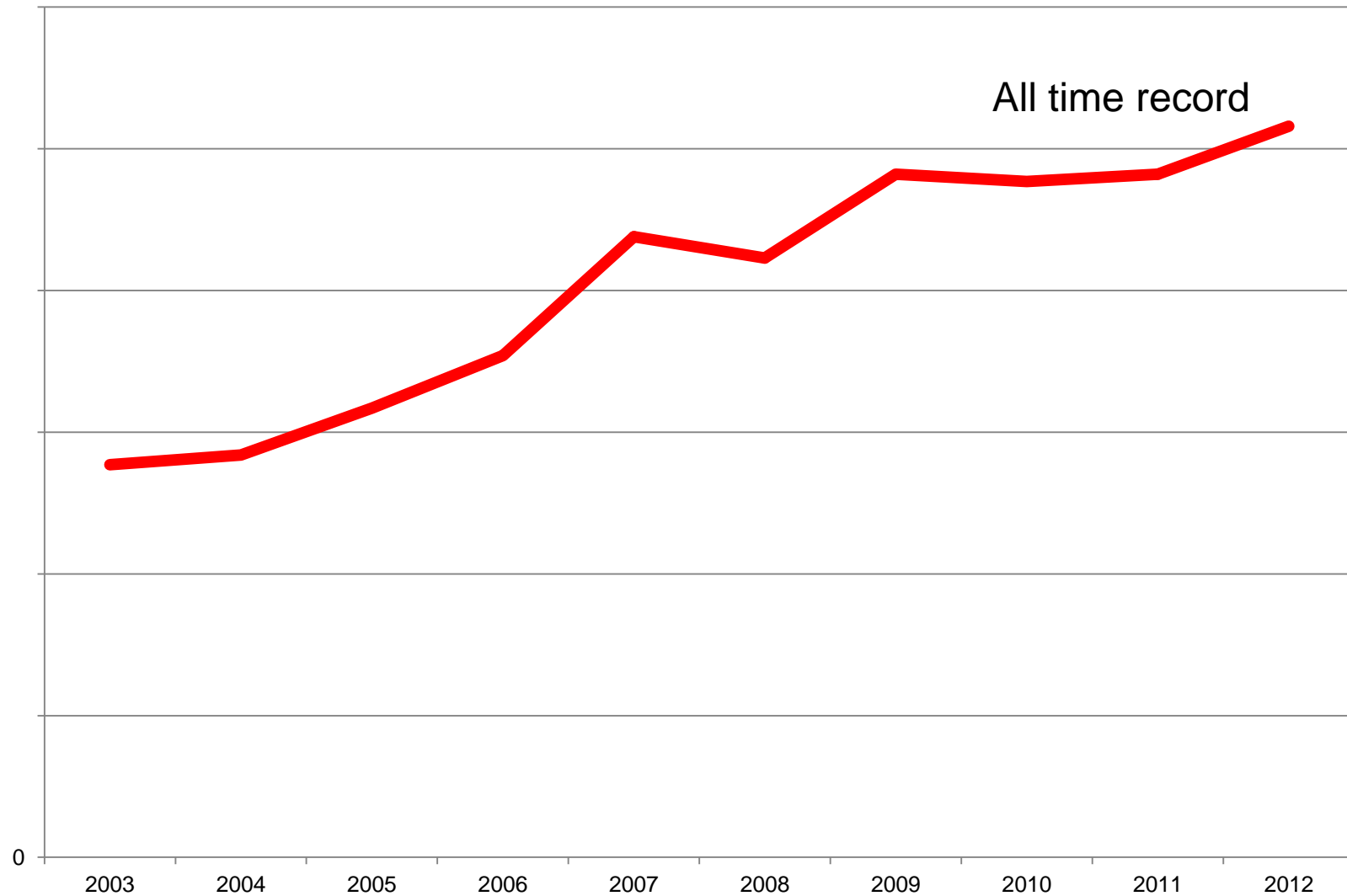
- **HIGH QUALITY (PRODUCTS AND SERVICE)**
- **EDUCATION PROVISION**
- **MOTIVATED EMPLOYEES**
- **CUSTOMER SATISFACTION**
- **LUMINARY KOL'S**

The results can be very good.....

Growth : orders

£100m's

UK Orders received FY 2007 to 2012/13



TOSHIBA

Leading Innovation >>>



MRI Scanner Room Option 1



MRI Scanner Room Option 2