



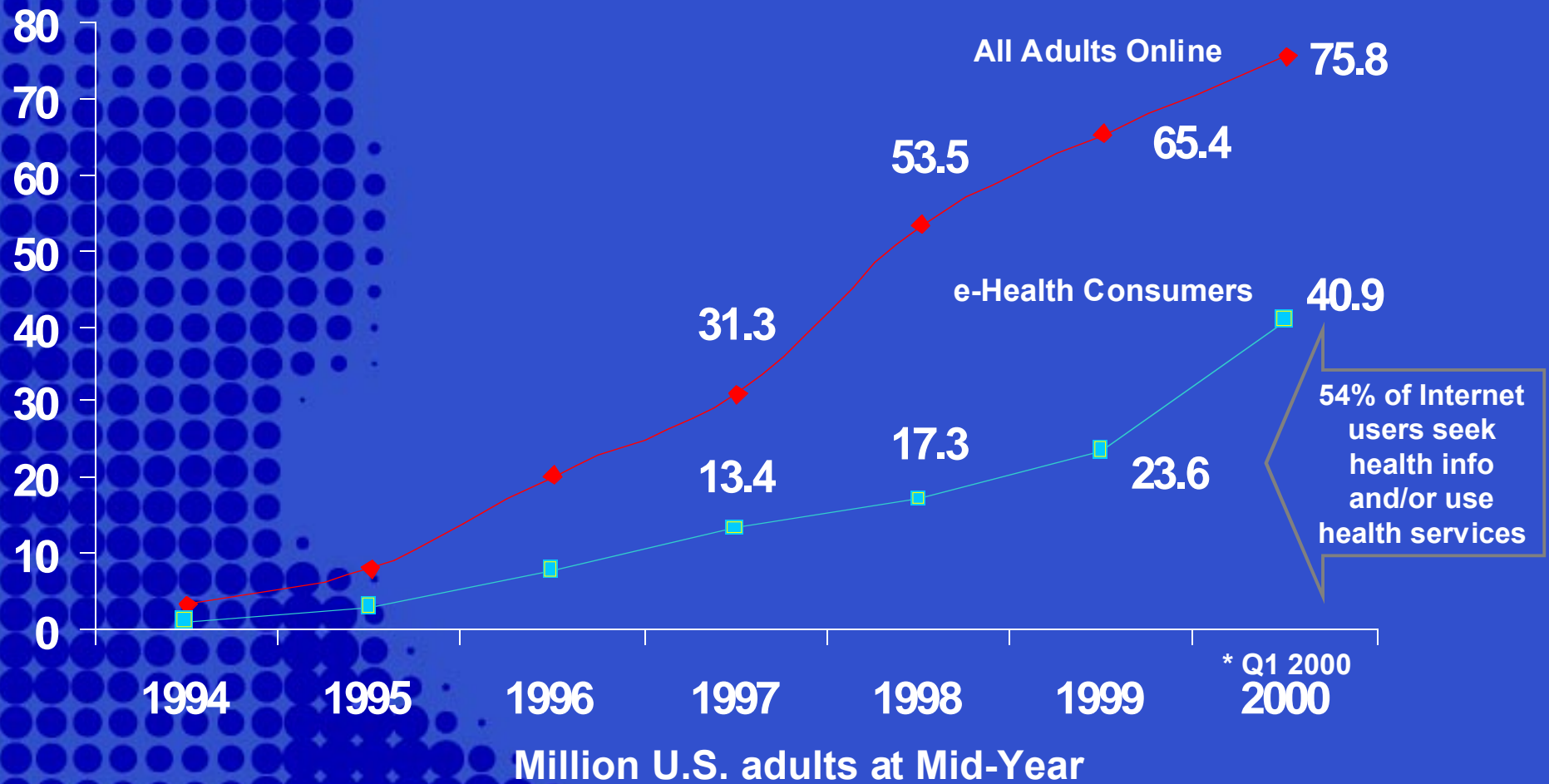
customer relationships through digital media™

## The Next Stage in e-Health: The Future of Provider/Payor Interactions

Thaddeus Grimes-Gruczka, VP, Health Practice  
The eHealth Colloquium  
25 August 2000

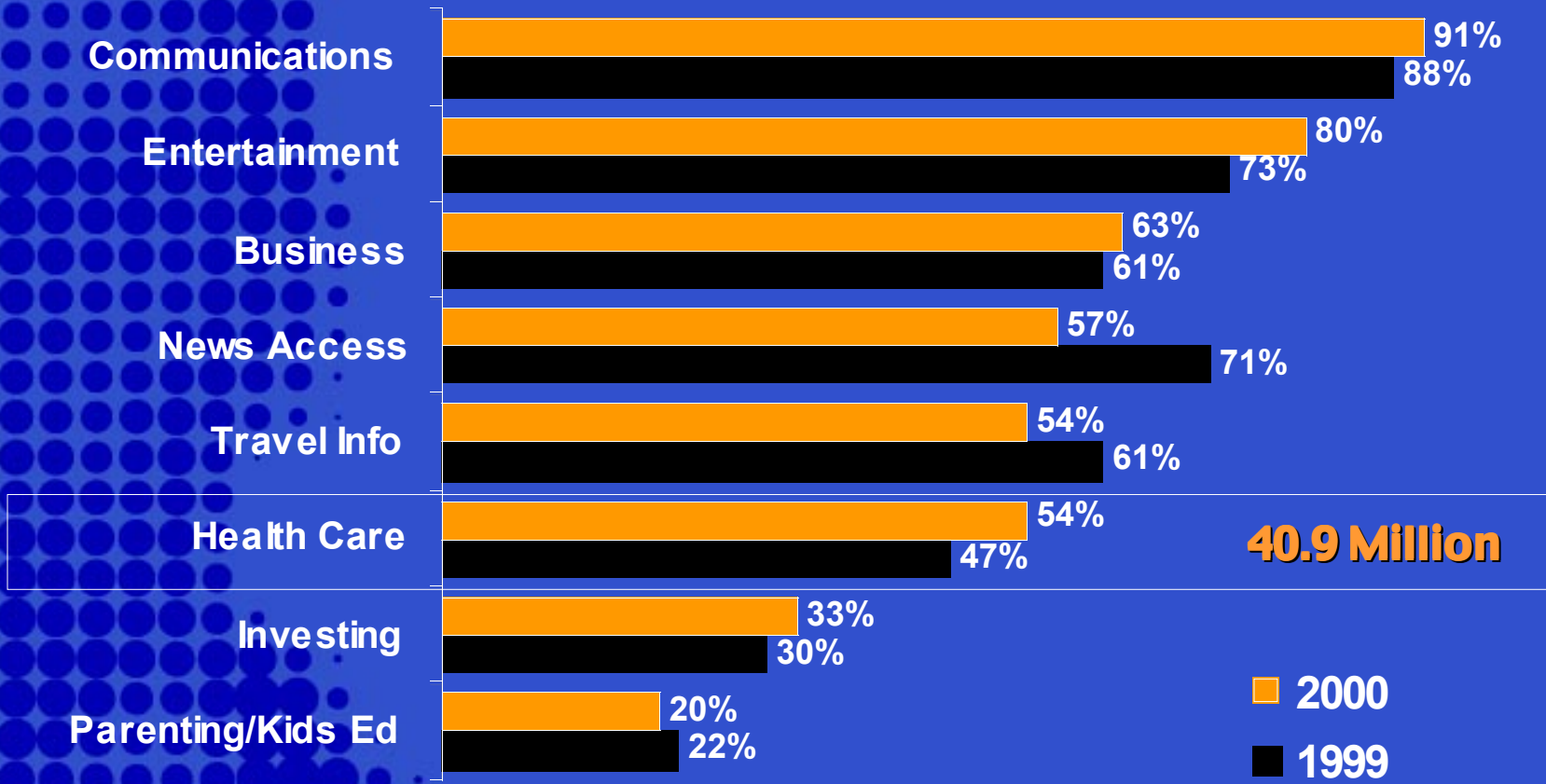
# Interest & Usage Growth

As Internet Usage has grown, so has the need for health information online



# Online Usage

Health care is one of the key reasons consumers go online



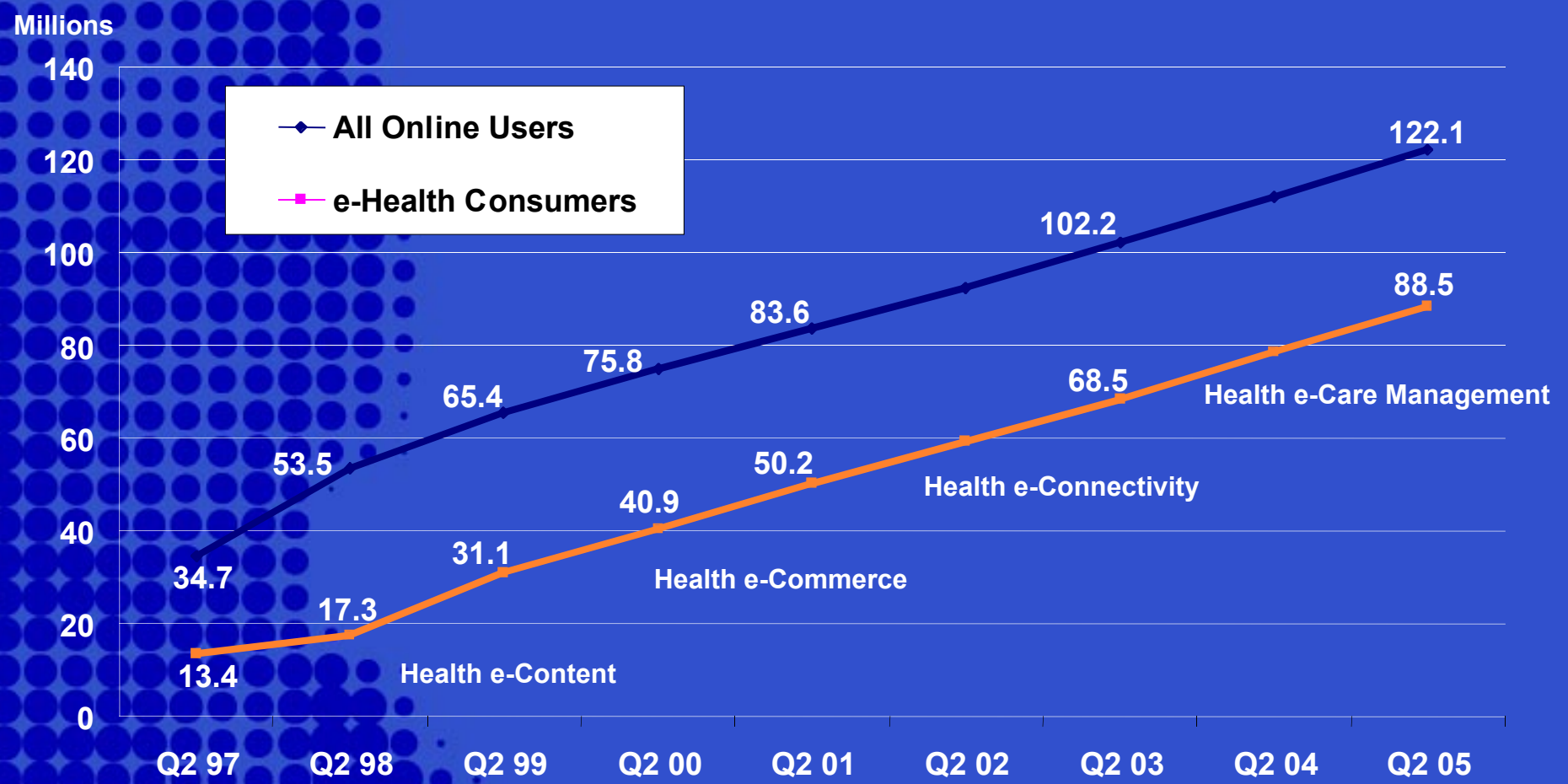
# Health Information Resources

- Sources currently used for health information

– Doctors	84%	
– Family members	54%	
– Pharmacists	53%	
– Magazines/newspapers	50%	
– Nurses/nurse practitioners	48%	
– TV	47%	
– Friends	47%	
– Medical Books	41%	
– Health newsletter	34%	
– Material from drug mfrs	32%	
– Medical journals	26%	
– Internet	21%	← Up from 13% in 1999
– Seminars	11%	



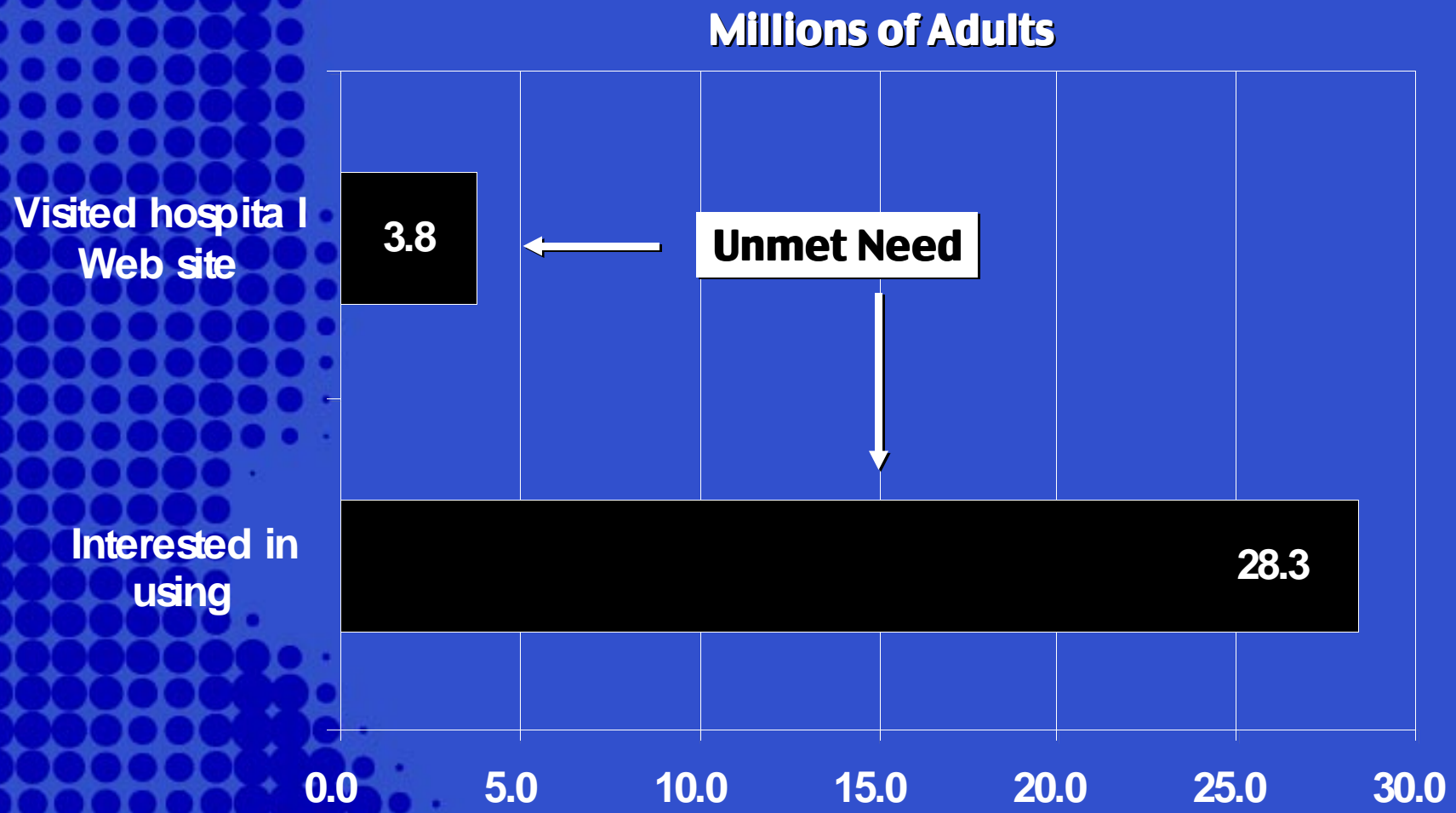
# The Future of e-Health Includes the 4 C's Content, Commerce, Connectivity, and Care Management



Million Of US Adults At Mid-Year

Source: Cyber Dialogue

# Using a Hospital Web Site



# Using a Doctor's Or Medical Office Web Site

Millions of Adults

Visited doctor's Web site

3.2

Unmet Need

Interested in using

33.4

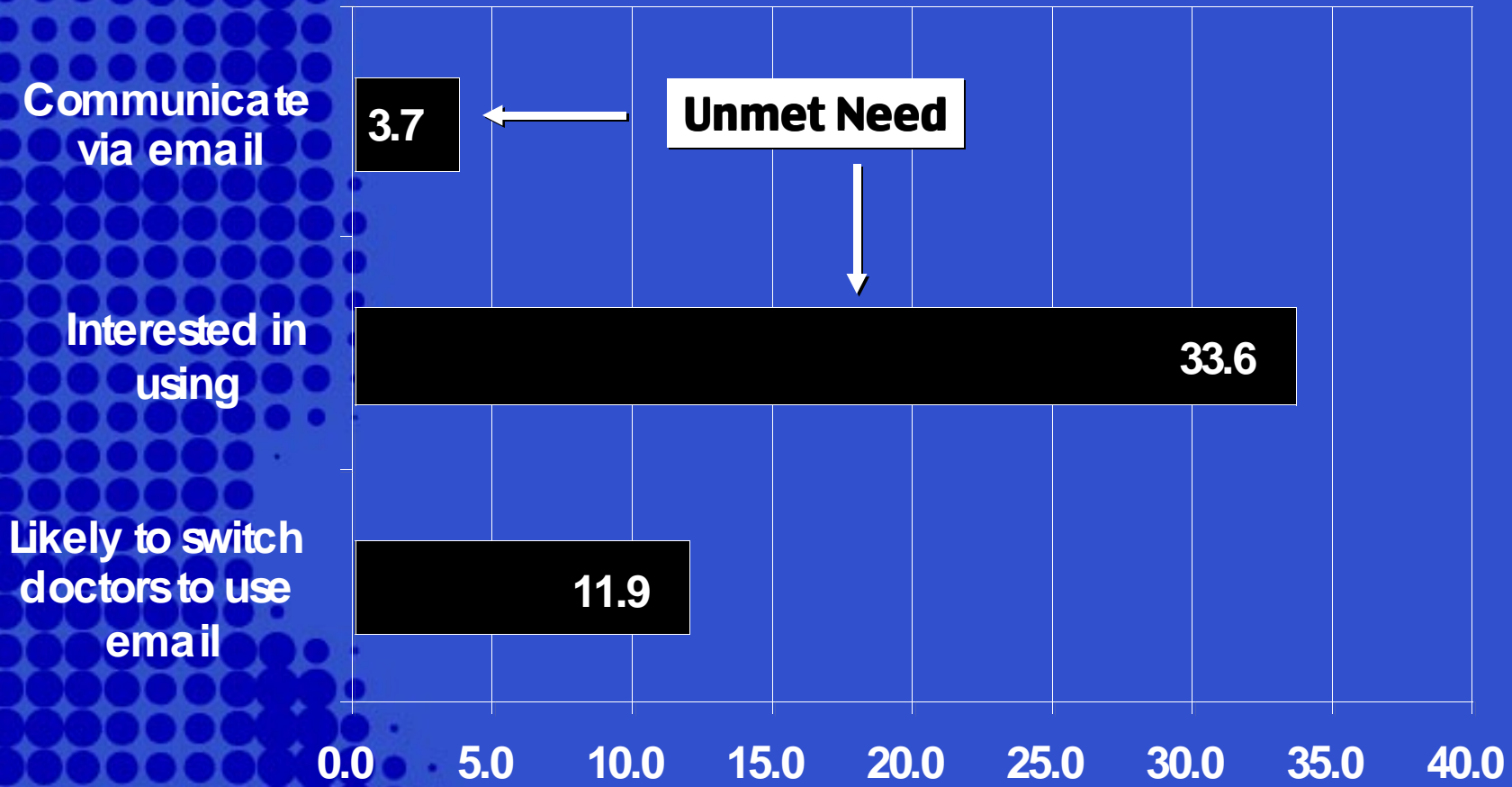
Likely to switch offices to use

14.8

0.0 5.0 10.0 15.0 20.0 25.0 30.0 35.0 40.0

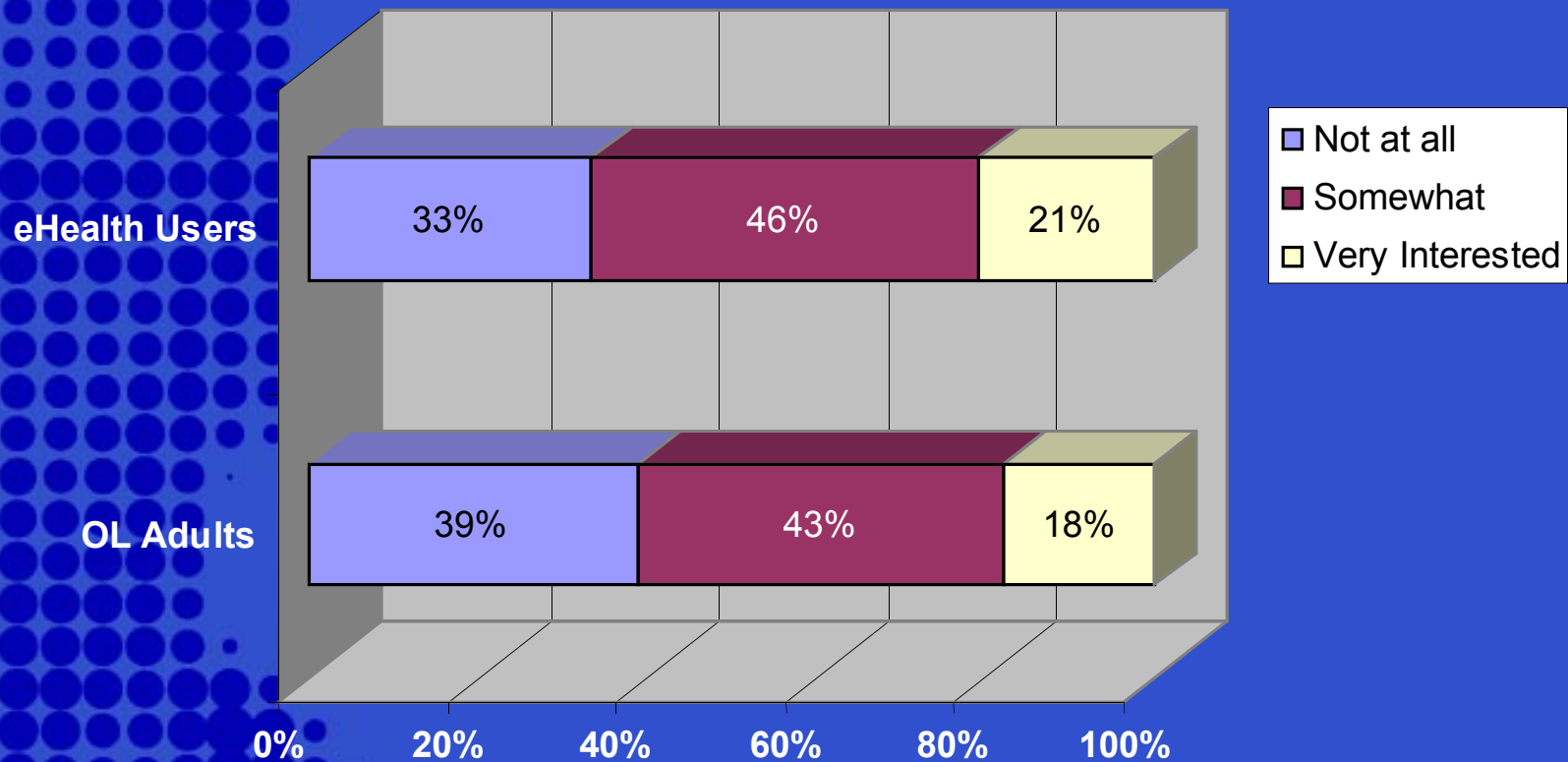
# Communicate With Doctor's Office by Email

Millions of Adults



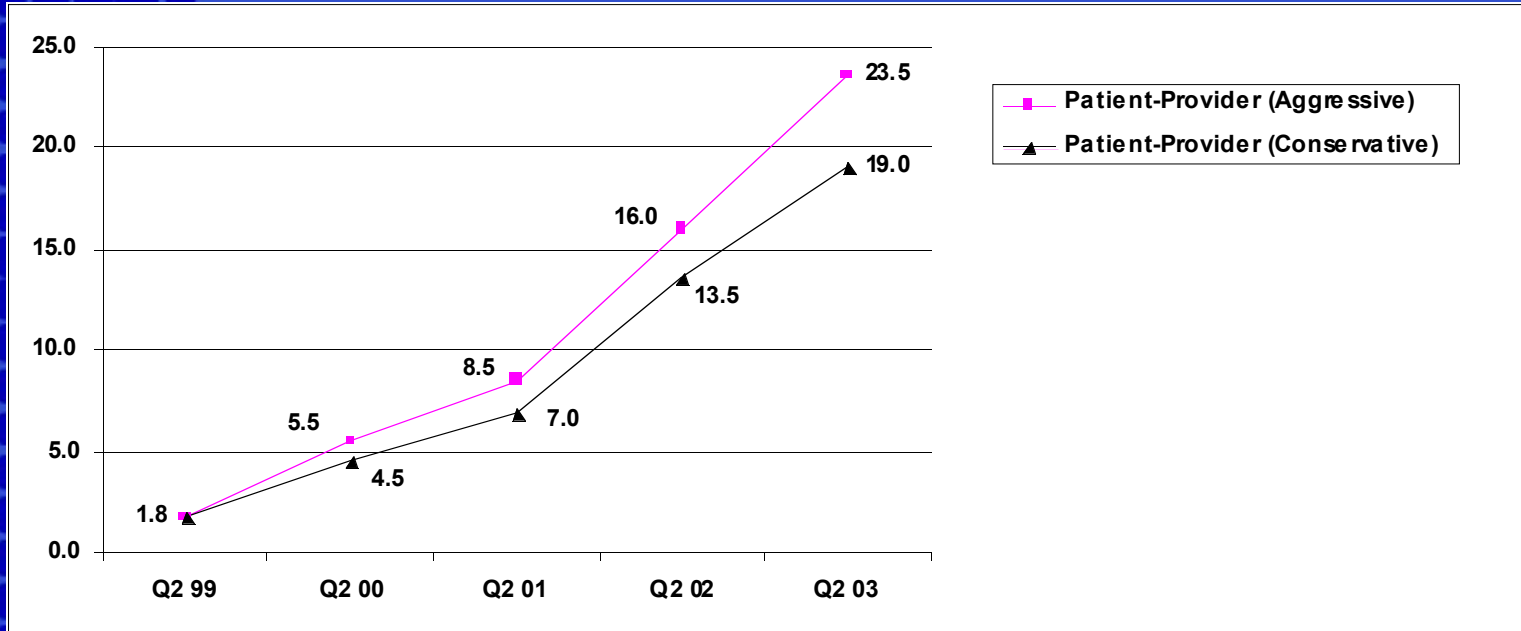


# Interest in Receiving Health Site Recommendations From Doctor ...



# Interaction Between Consumers And Providers

Millions



### Drivers

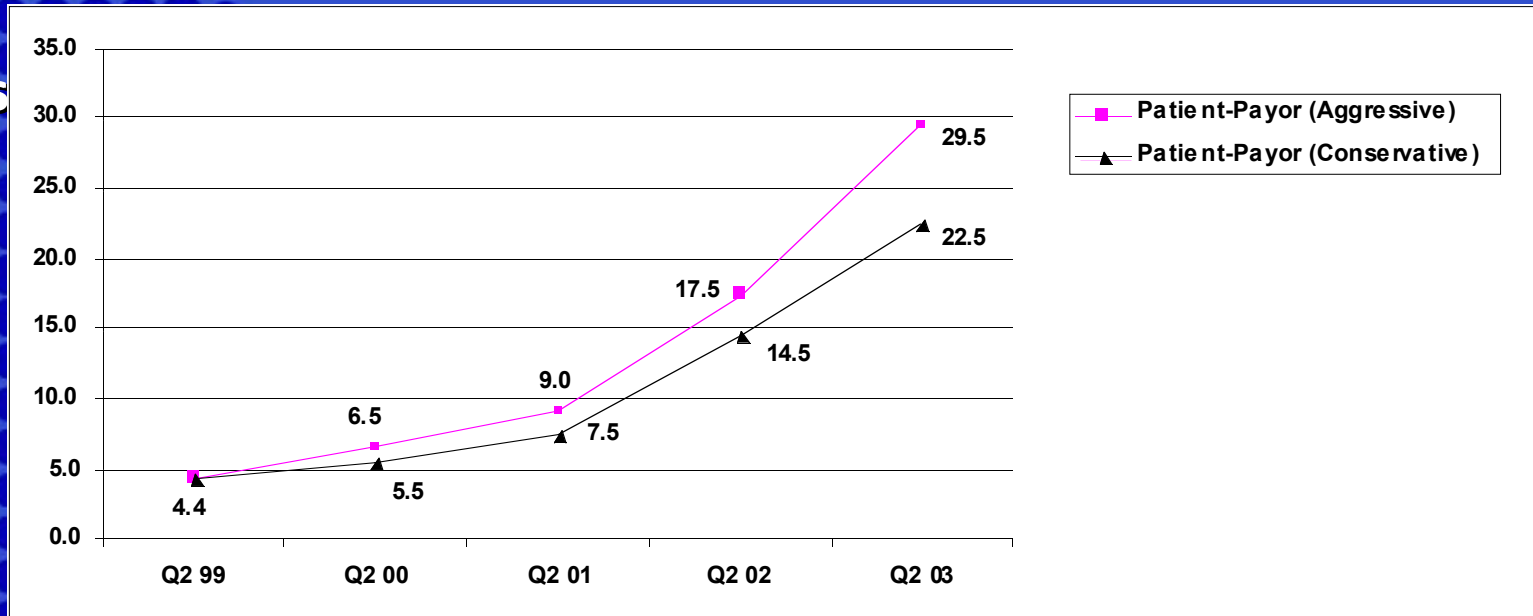
- Reimbursement for online consults
- Medical offices going online in general
- Patient demand for online services

### Inhibitors

- Lack of reimbursement for online consults
- Lack of “wired” medical offices
- Legal concerns by medical staff

# Interaction Between Consumers And Payors

Millions



## Drivers

- Employers pushing employees to use online services to reduce costs
- Health plans rolling out online customer service/relationship platforms
- Building consumer demand for services  
*\*\* checking the status of a claim has very high consumer interest/demand*

## Inhibitors

- Lack of health plans embracing the Web for customer service programs
- Fear that online transactions will decrease the “float” period for payors
- Reliance on legacy information systems already in place

# Summary

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- The Internet should continue to grow at a rapid pace through 2005 but will likely never approach total penetration of current adults
- Personal dependence and user diversity on the Internet are rising, driving the need for continual reevaluation of product and service offerings
- Growth in e-health should continue to outpace overall Internet growth, with healthcare surpassing most other content types
- The Internet possesses a unique action-inducing quality that should be viewed as an opportunity, not a threat, by old-line healthcare