



Jupiter Overview Of Online Health Landscape

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August 25, 2000



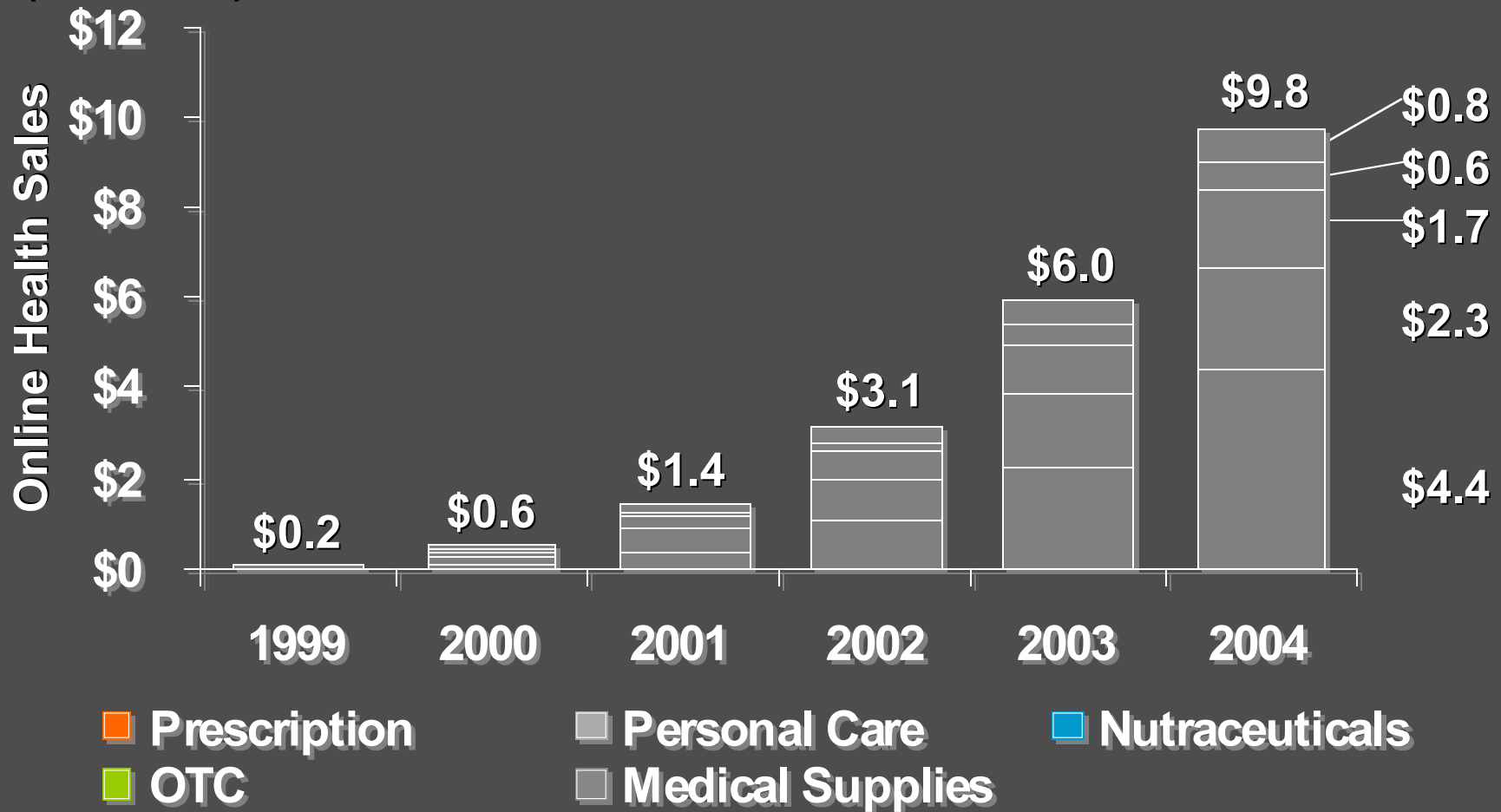


E-Health: A Rich, But Slow-Moving Opportunity

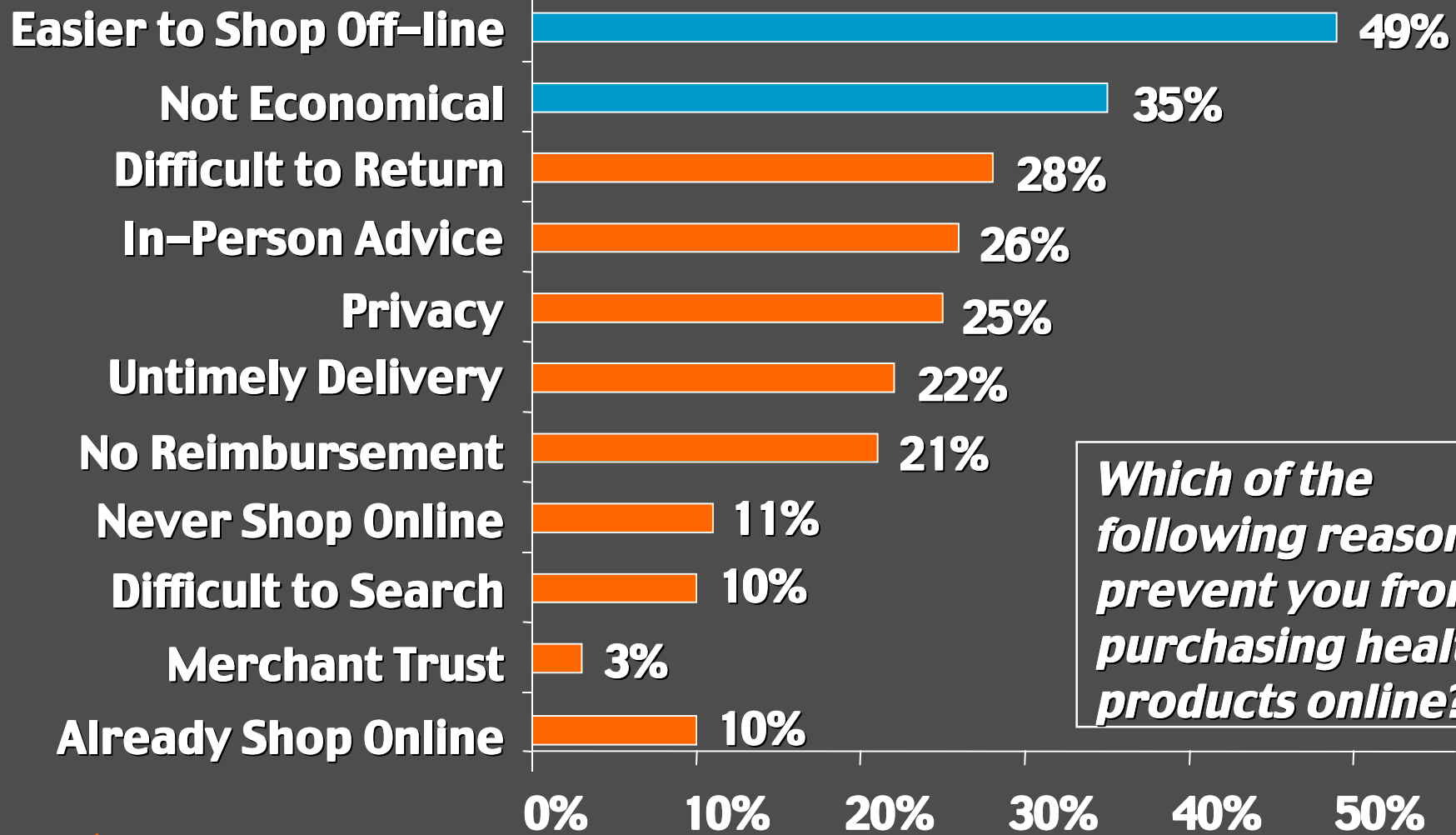
- **It's moving more slowly than the hype would suggest**
 - **Though the shakeout will help**
- **Strategies must more closely reflect revenue dynamics and targets' needs**
- **Broad offerings and alliances key**

Commerce Growth Fragmented Across Categories

(in billions)



Consumers Do Not Find Compelling Value



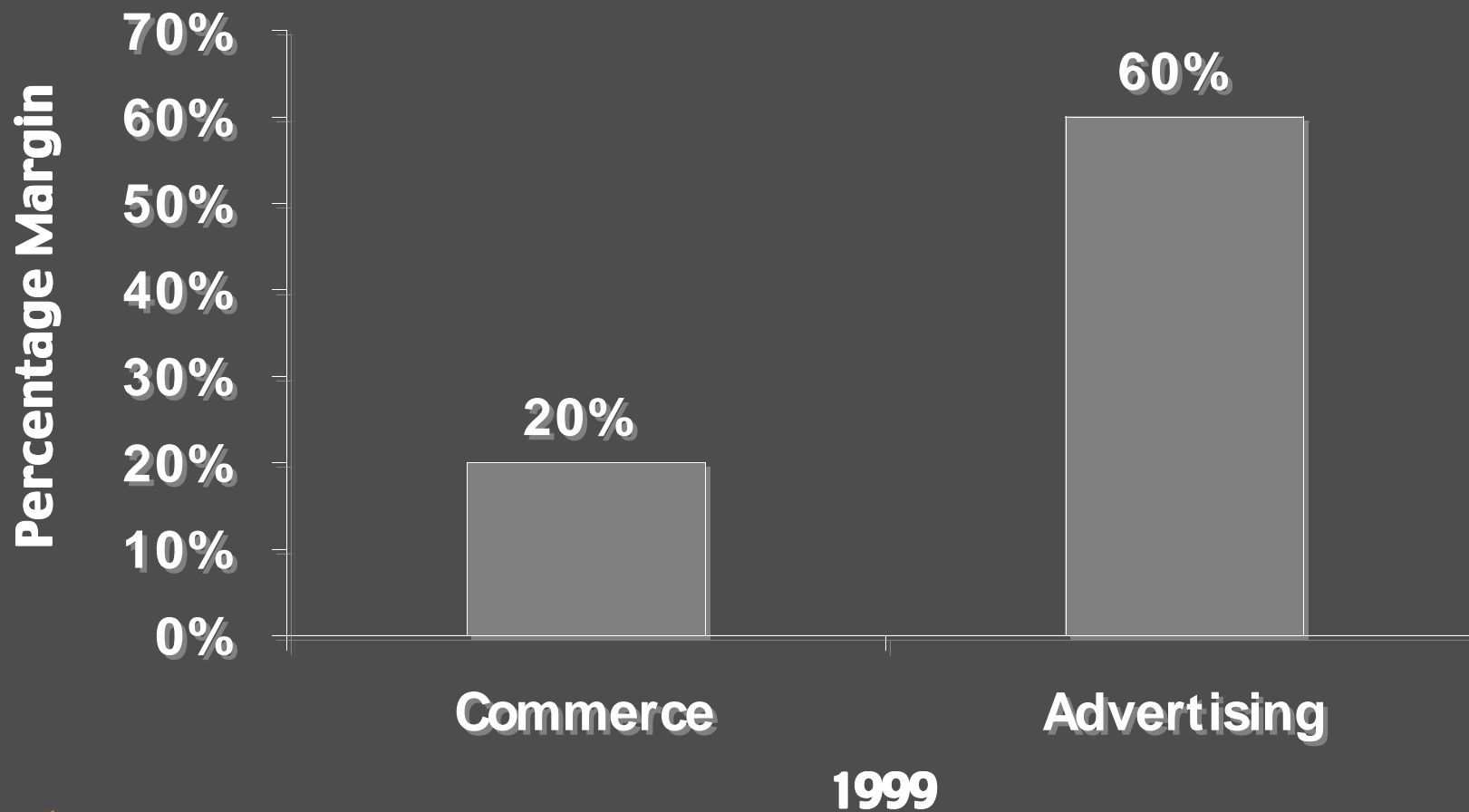
Which of the following reasons prevent you from purchasing health products online?



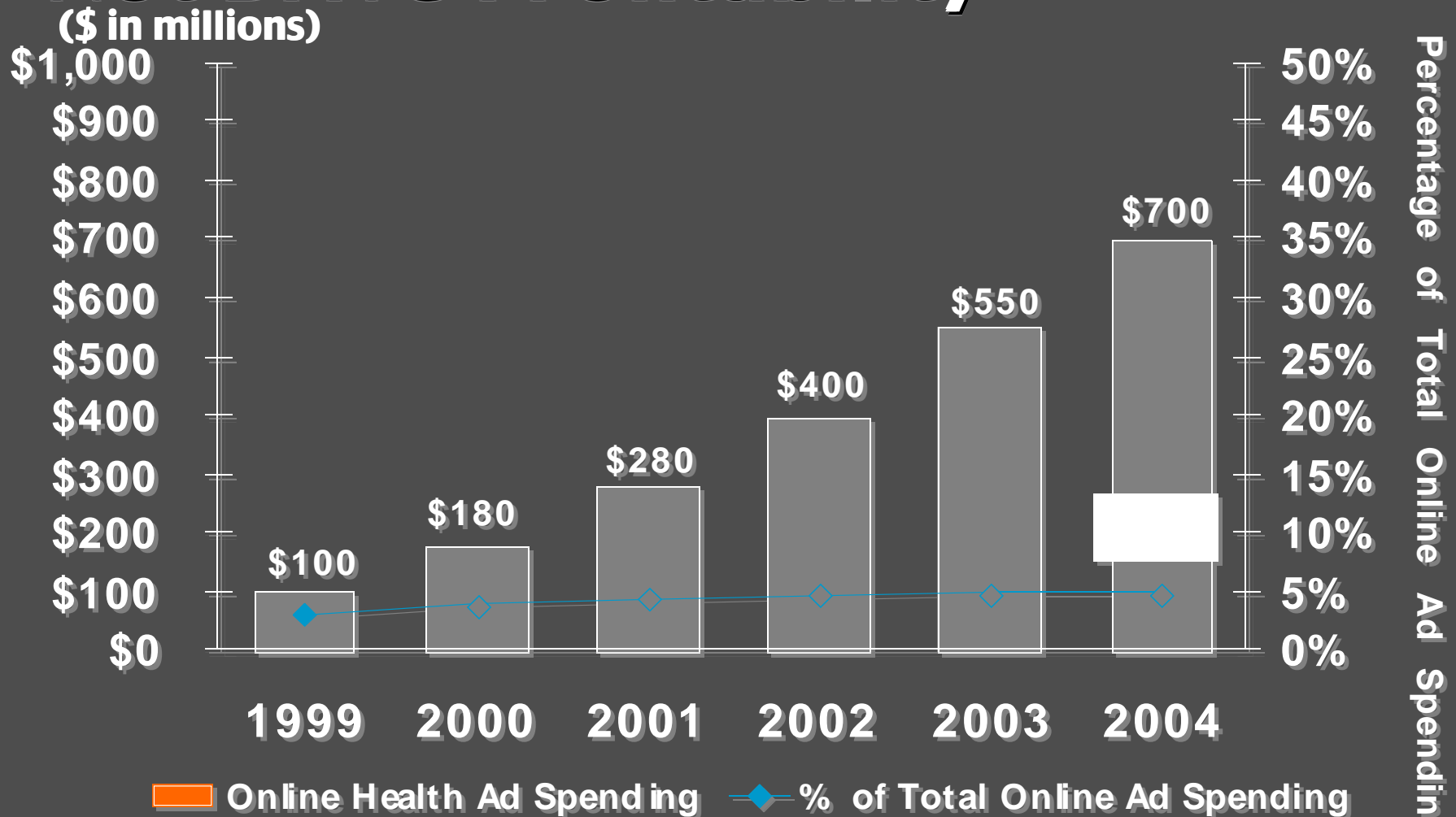
Jupiter

Jupiter/NFO Consumer Survey; N=1,667

Ad Margins May Suggest Content Is King After All...



...But Ad Dollars Alone Will Not Drive Profitability



Jupiter

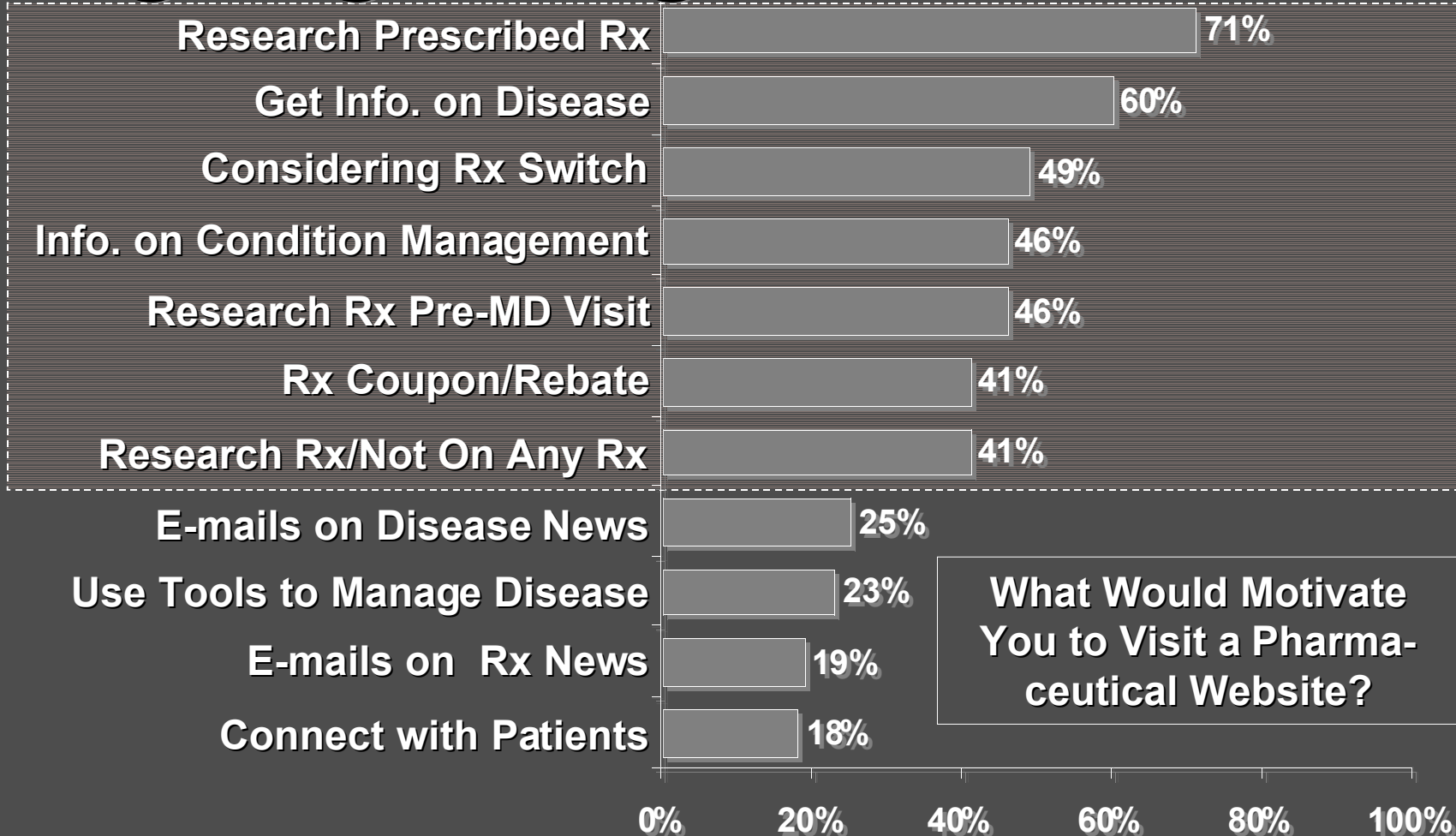
Note: Includes Rx DTC, non-Rx health product, and health retailer spending

Meager Rx Co Investment Largely Earmarked for Site Initiatives

Will You Increase the Following Types
Of DTC Spending in the Next Year?

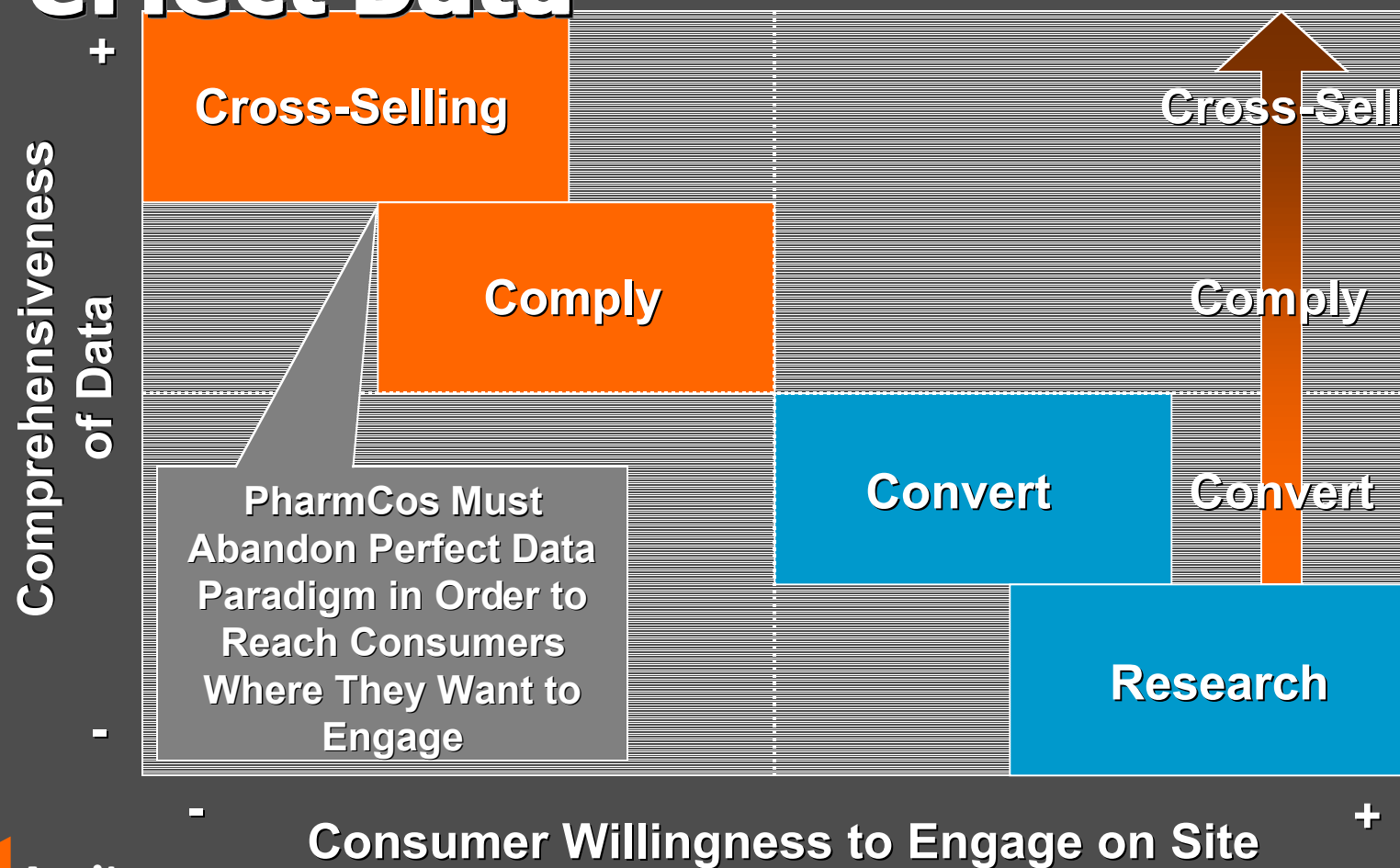
Largest Increase	Moderate Increase	Decrease/Stay
<ul style="list-style-type: none"> ▪ Data Collection for CRM ▪ Site-Specific Content Updates ▪ Site-Specific Tools ▪ Site-Generated E-mail Newsletters 	<ul style="list-style-type: none"> ▪ Health-Site Content Sponsorship ▪ On-site Couponing ▪ Non-Health Site Banner Placement 	<p>Same</p> <ul style="list-style-type: none"> ▪ Health Site E-mail Newsletter Sponsorship ▪ Health Site Banner Placement ▪ Keyword Banner Placement

But Consumers Less Interested in Ongoing Dialogue with Rx Sites

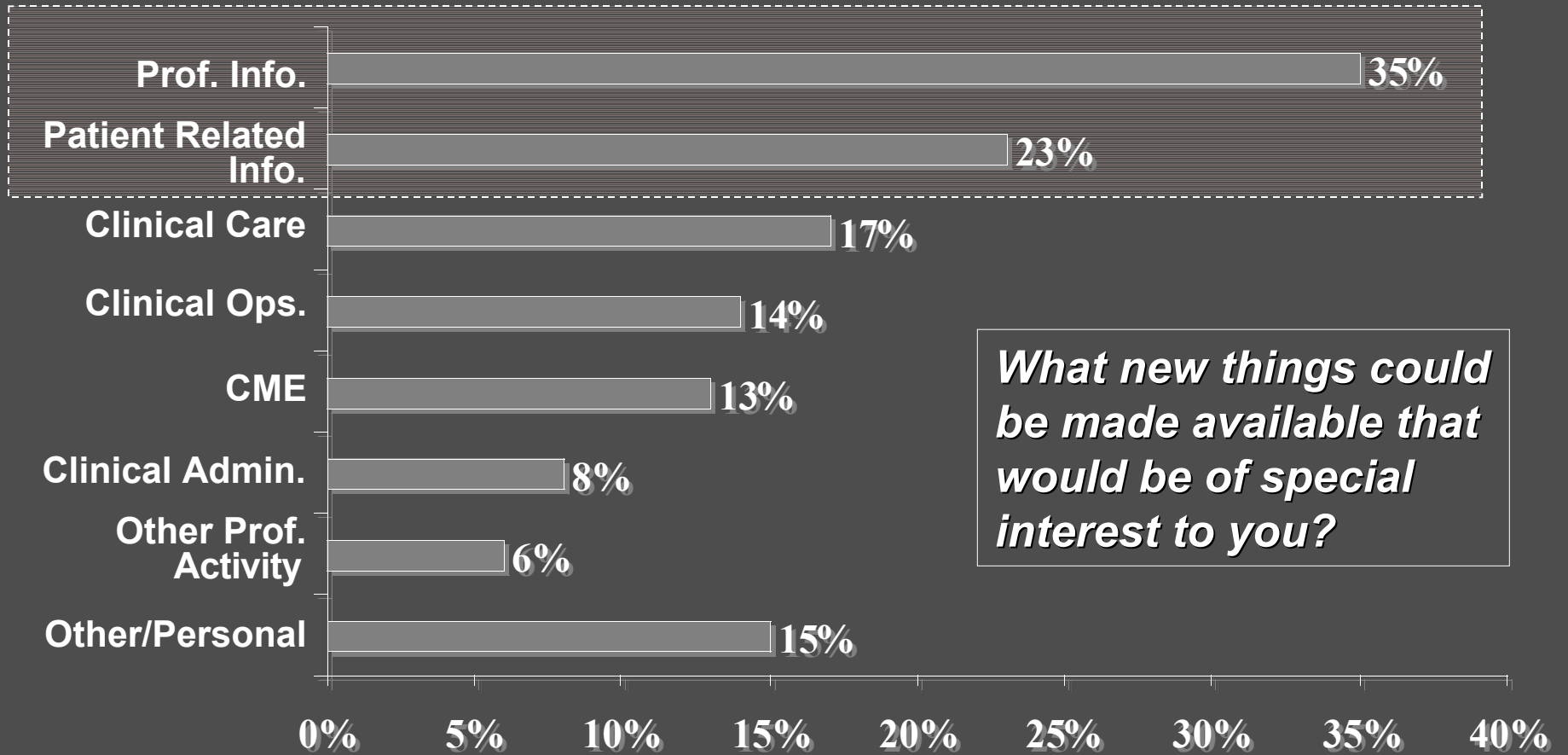


What Would Motivate You to Visit a Pharmaceutical Website?

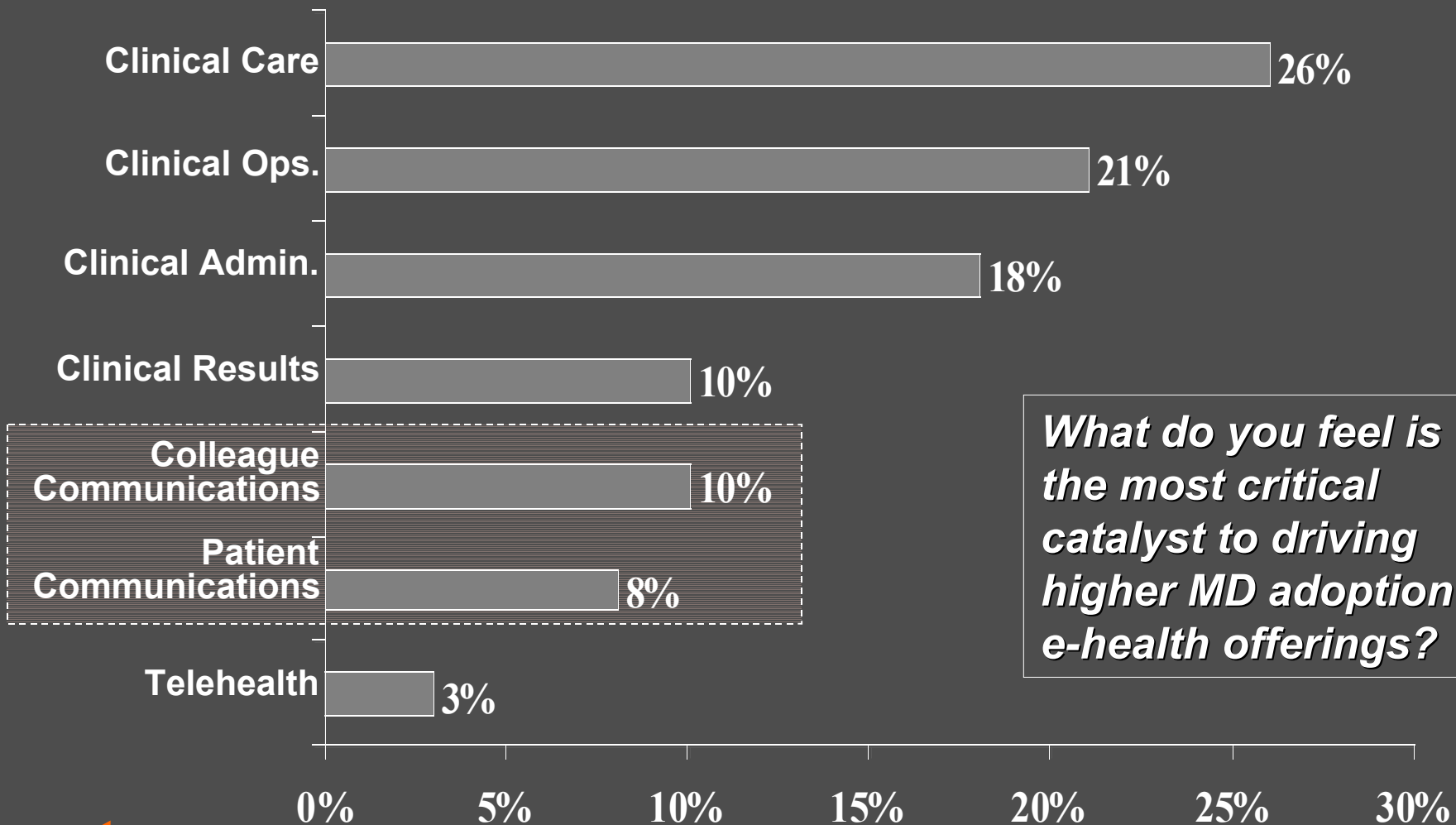
Partner, Partner Partner: Abandon The Pipedream Of Perfect Data



MDs Crave Higher-Quality Info For Themselves And Patients



But Near-Term, Execs Too Focused On Clinical “Killer Apps”



What do you feel is the most critical catalyst to driving higher MD adoption of e-health offerings?

Work First To Enhance Data And “Communication Catalysts”

MD-to-Patient

MD- to-MD

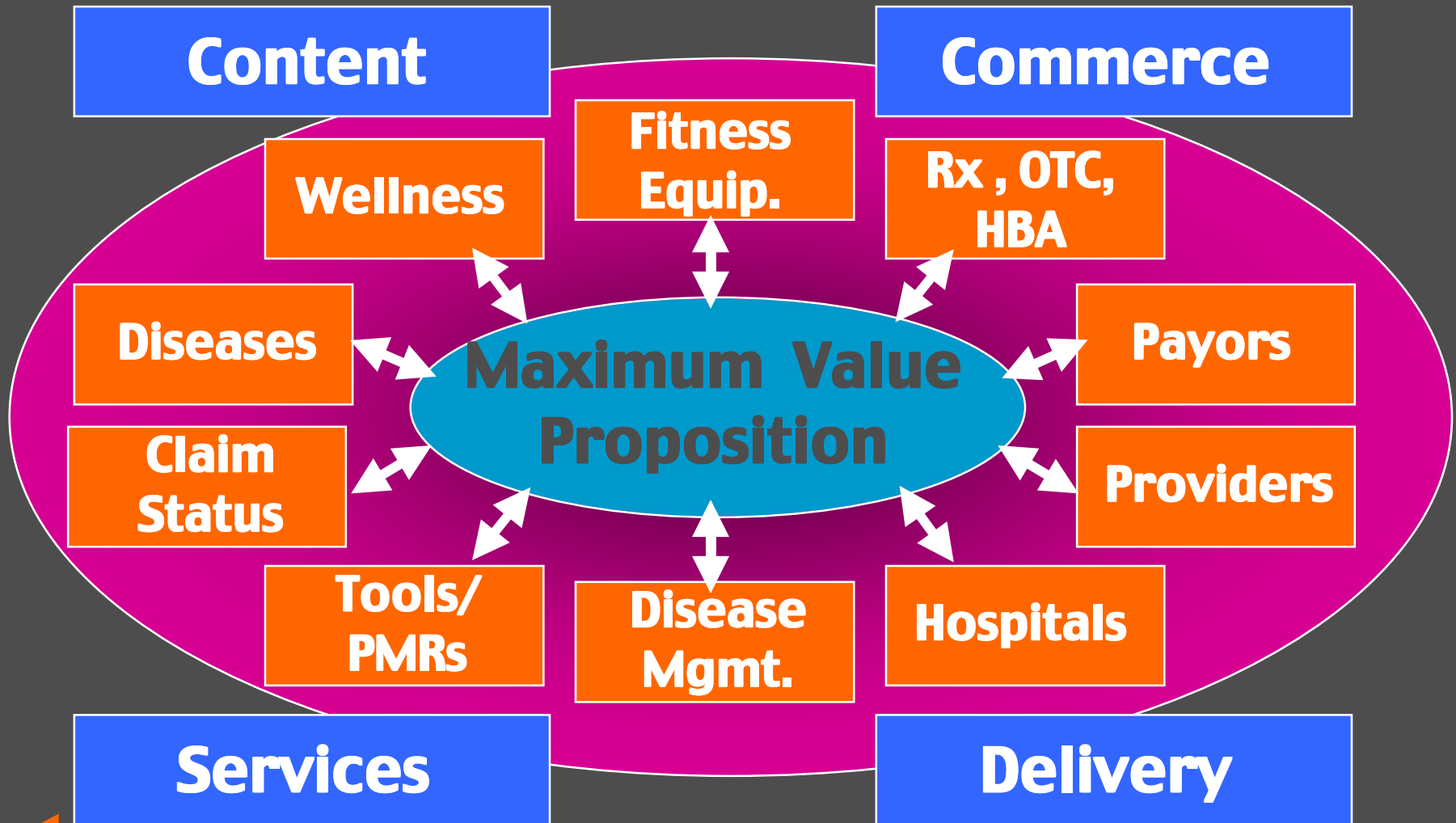
Communication

Content

Communication

Multi-platform adaptable

Broad Alliances Critical To Maximize System Value





To Recap

- **Players in danger of misfiring due to lack of focus on constituent needs**
- **Figure out progression of needs...and build, buy or ally to meet them**



Thank You

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