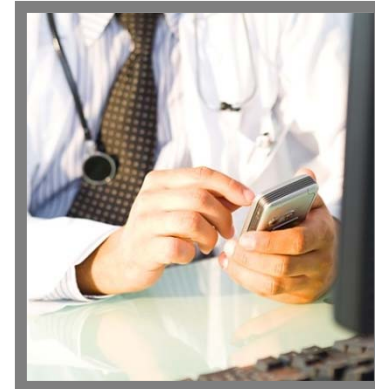


Analyzing Digital Health by the Numbers:

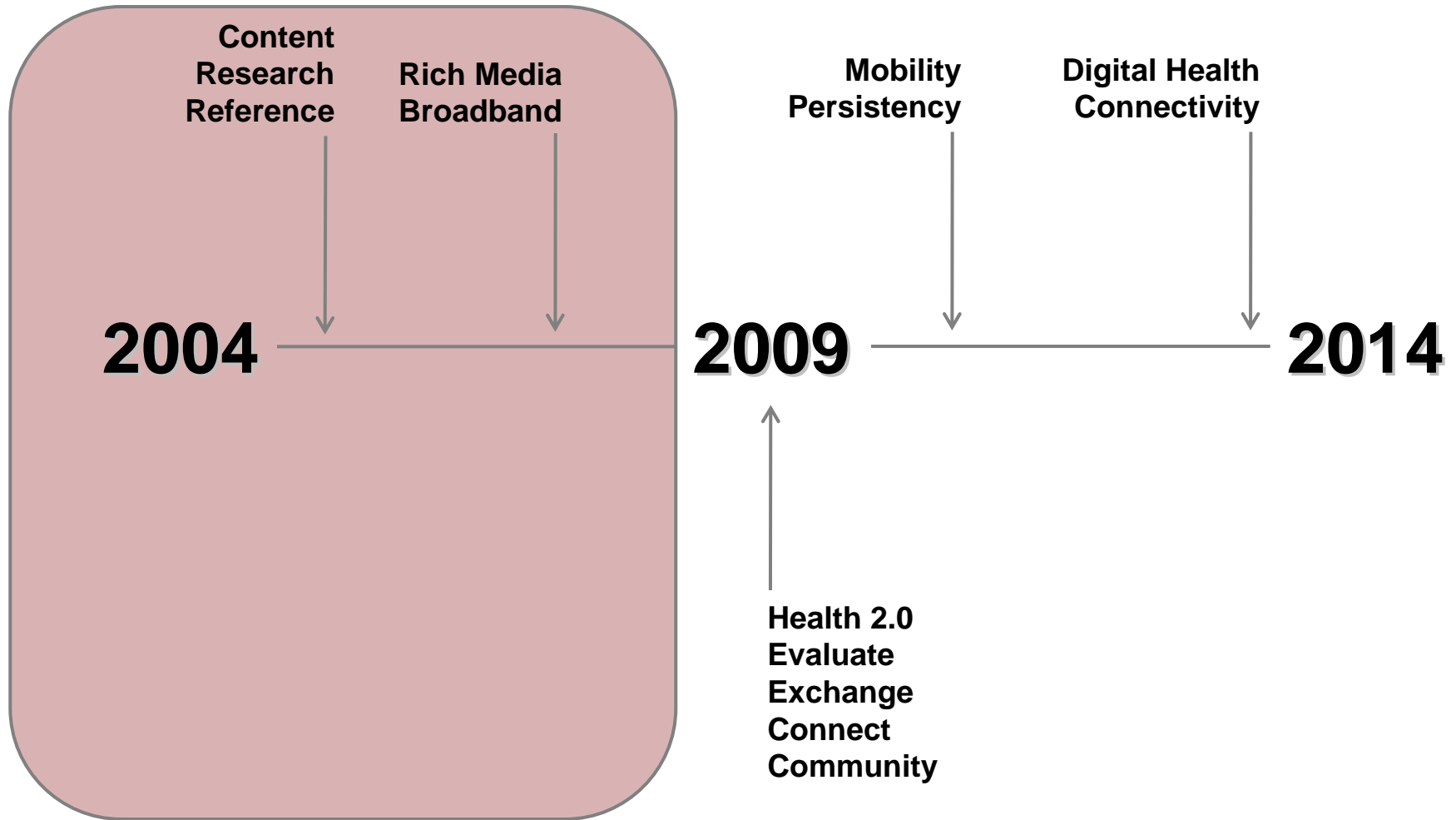
Five Years of Market Trends –
and What They Mean for the Next Five



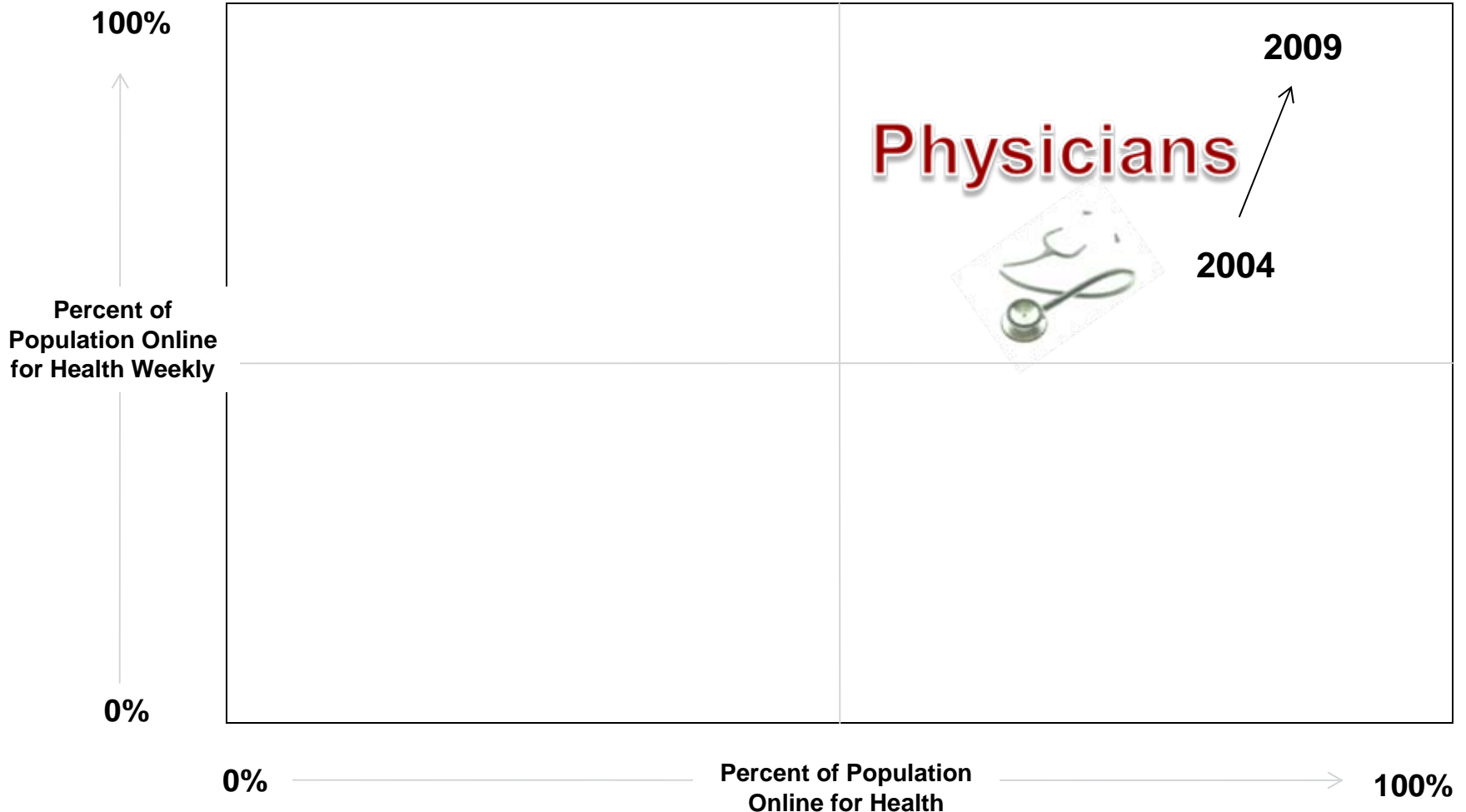
2009 Connected Health Symposium
October 21-22, 2009
Boston Park Plaza Hotel & Towers

Mark Bard
President, Manhattan Research
mbard@manhattanresearch.com

E-Health Timeline: A 10 Year View of Progress to Date and Future Potential

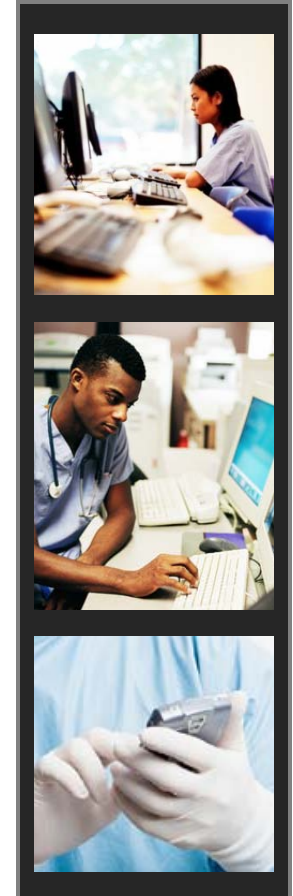
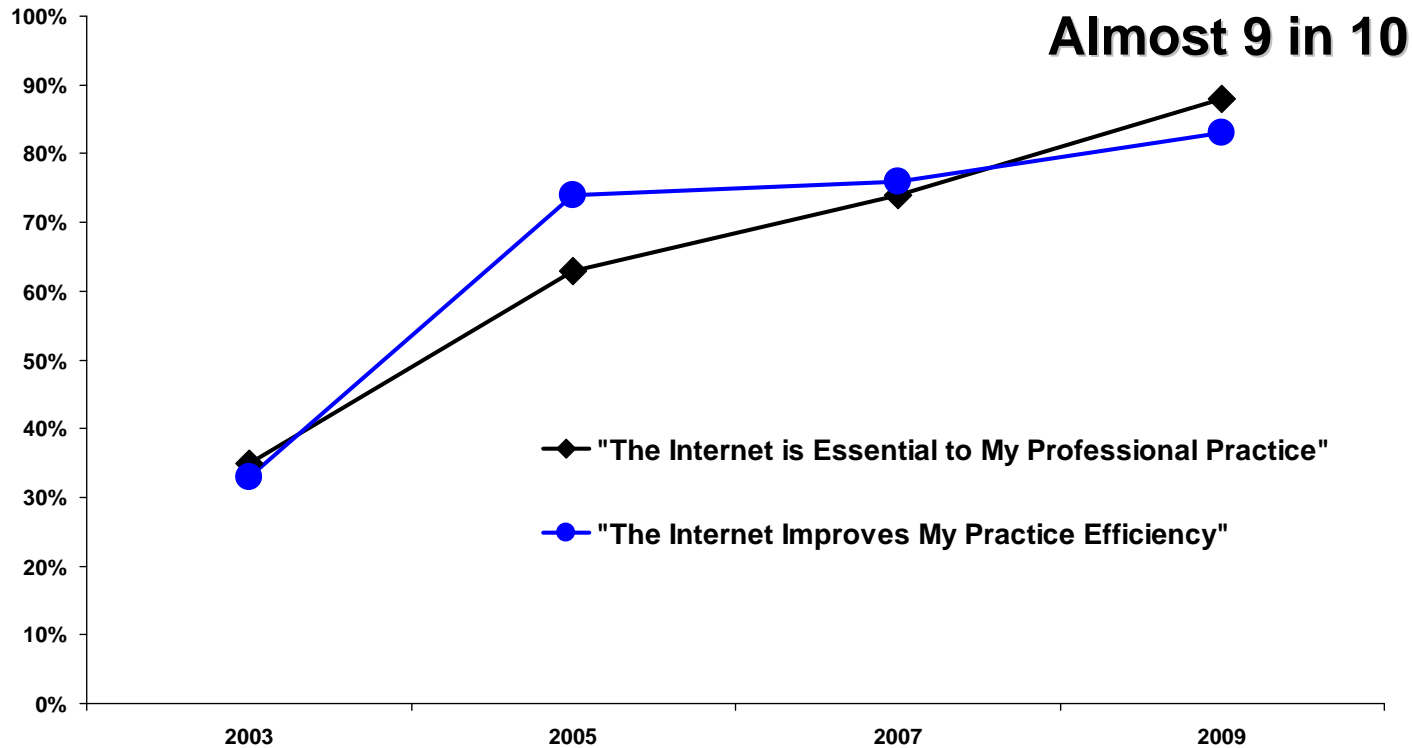


The Relative Role of the Online Channel from the Physician Point of View



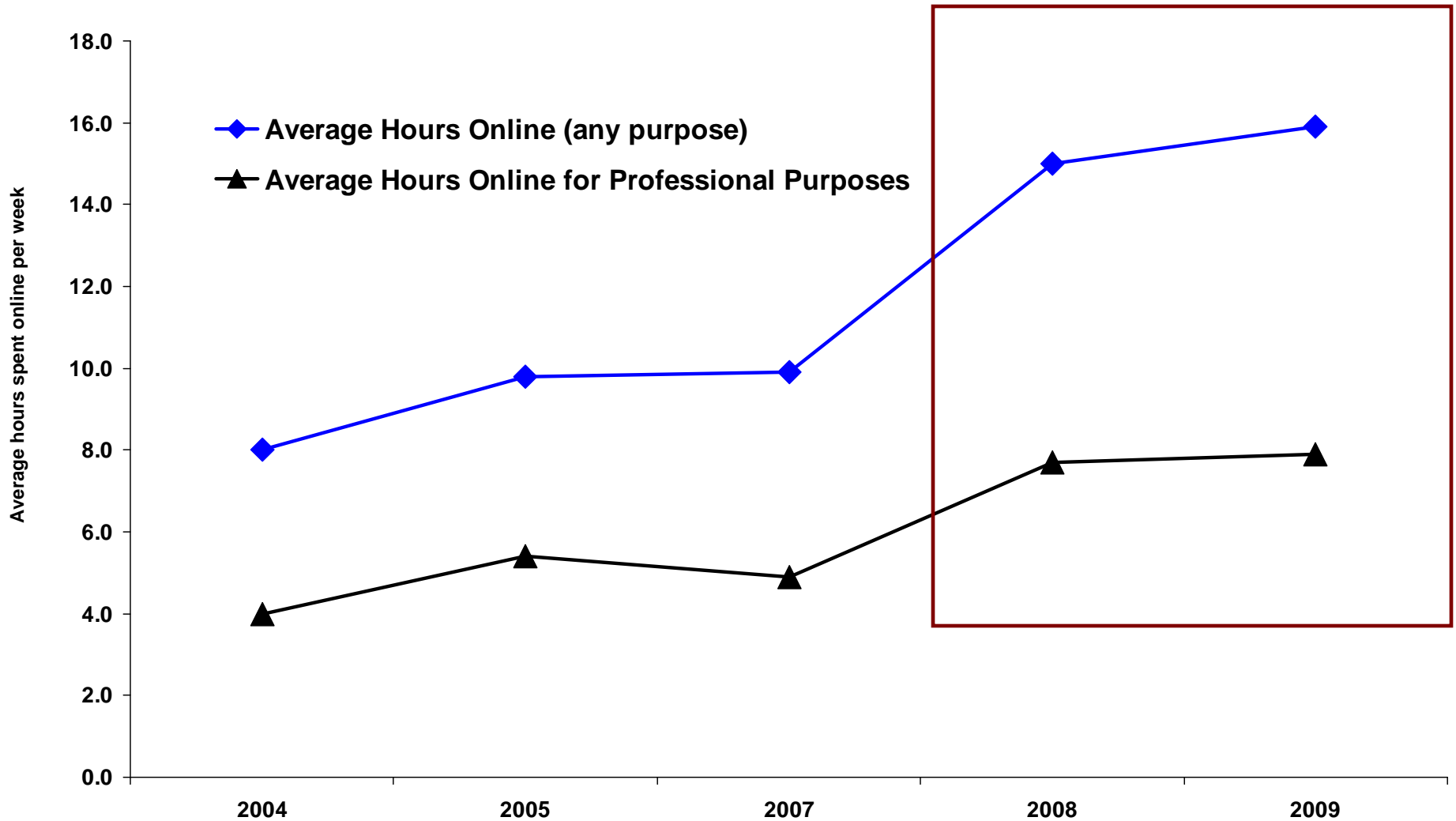
Despite High Frequency Access, It Took Time for the Internet to Become "Must Have"

Percent of Physicians Agreeing with Statement



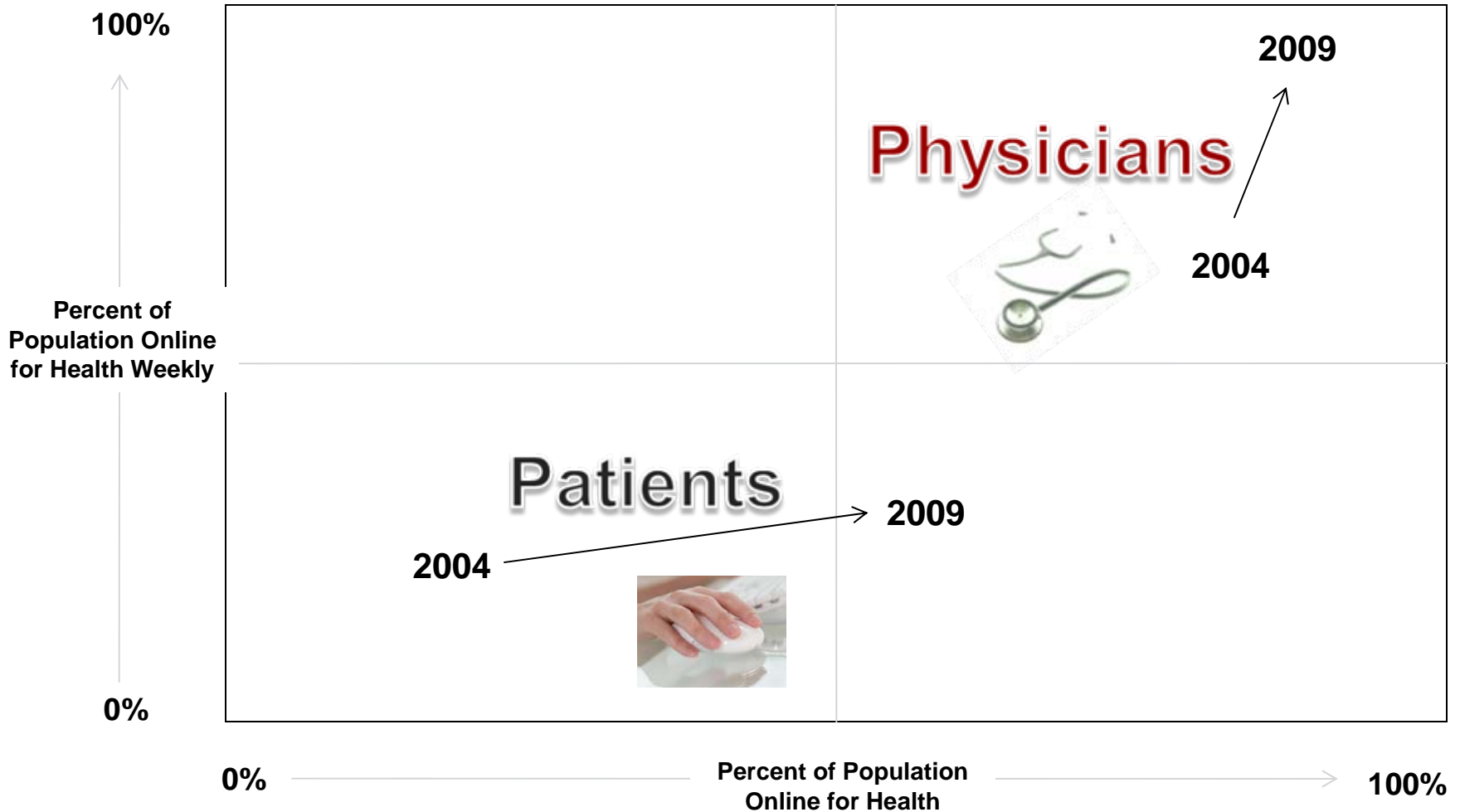
Source: Taking the Pulse®

Physicians Hours Online Doubled Since 2004, Up to One Workday per Week

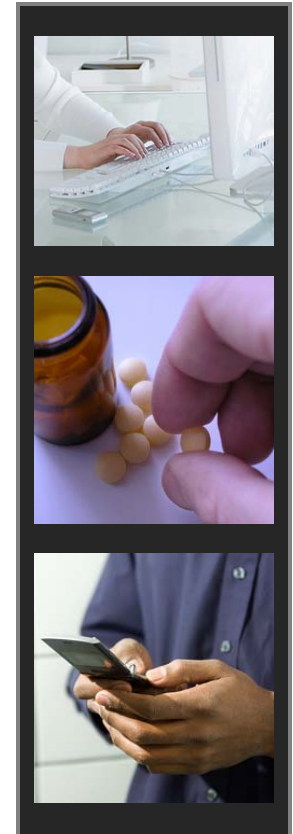
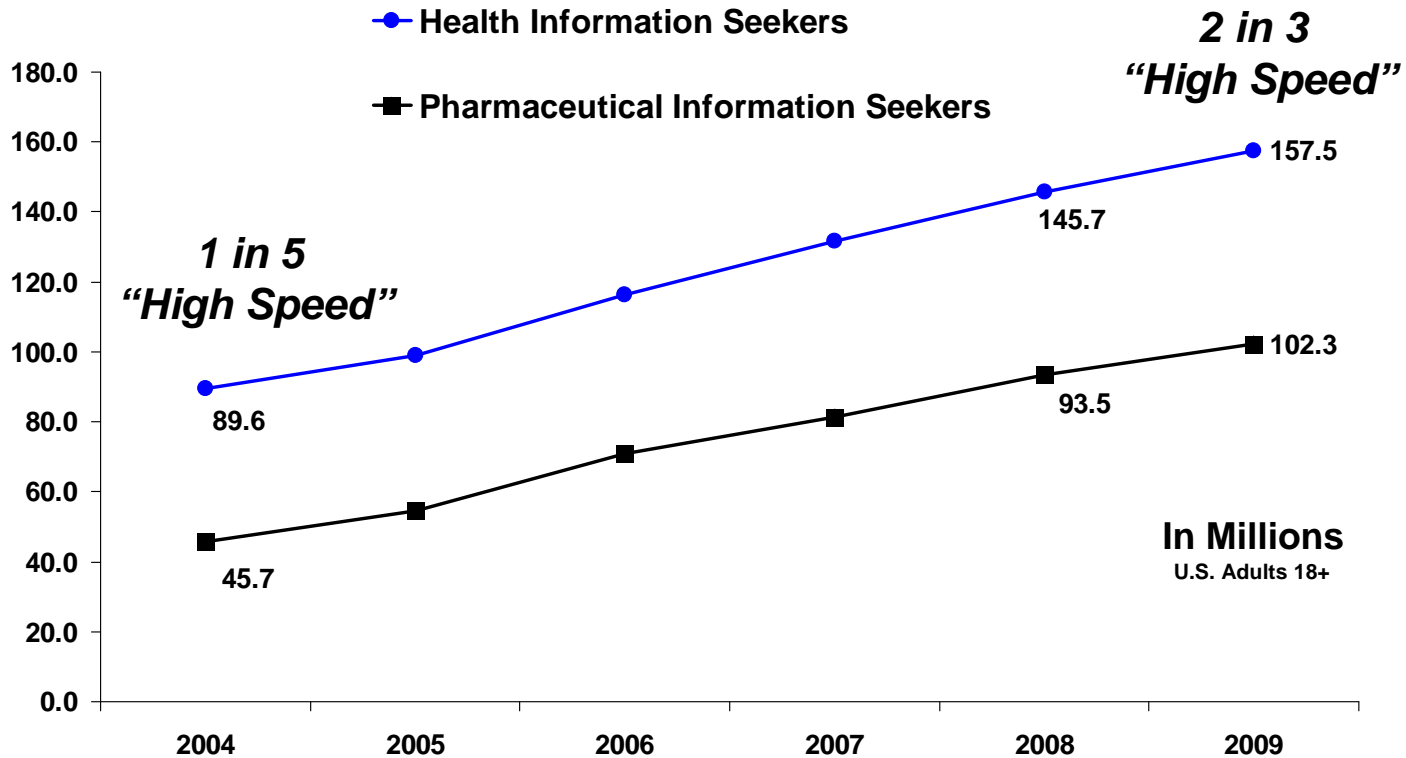


Source: Taking the Pulse®

The Relative Role of the Online Channel from the Patient Point of View

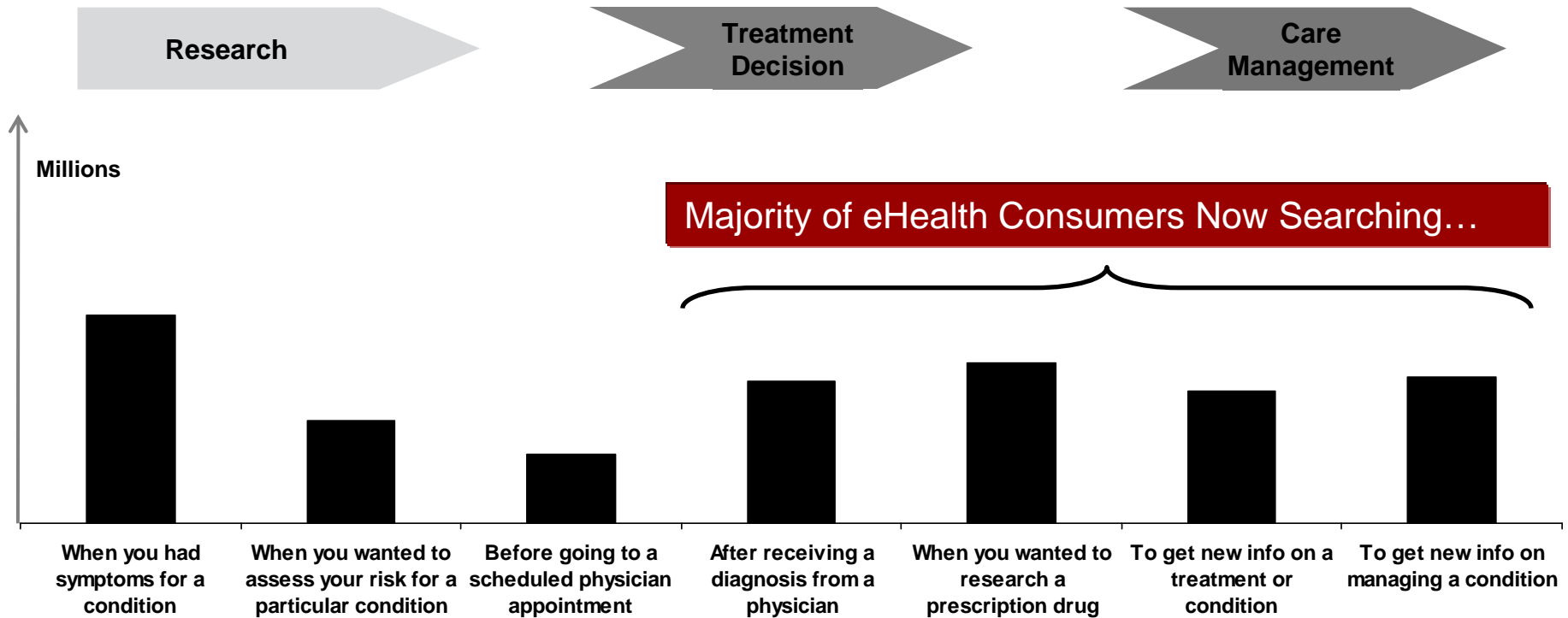


Are We Closing in on the End of the Rapid E-Health Growth Curve?



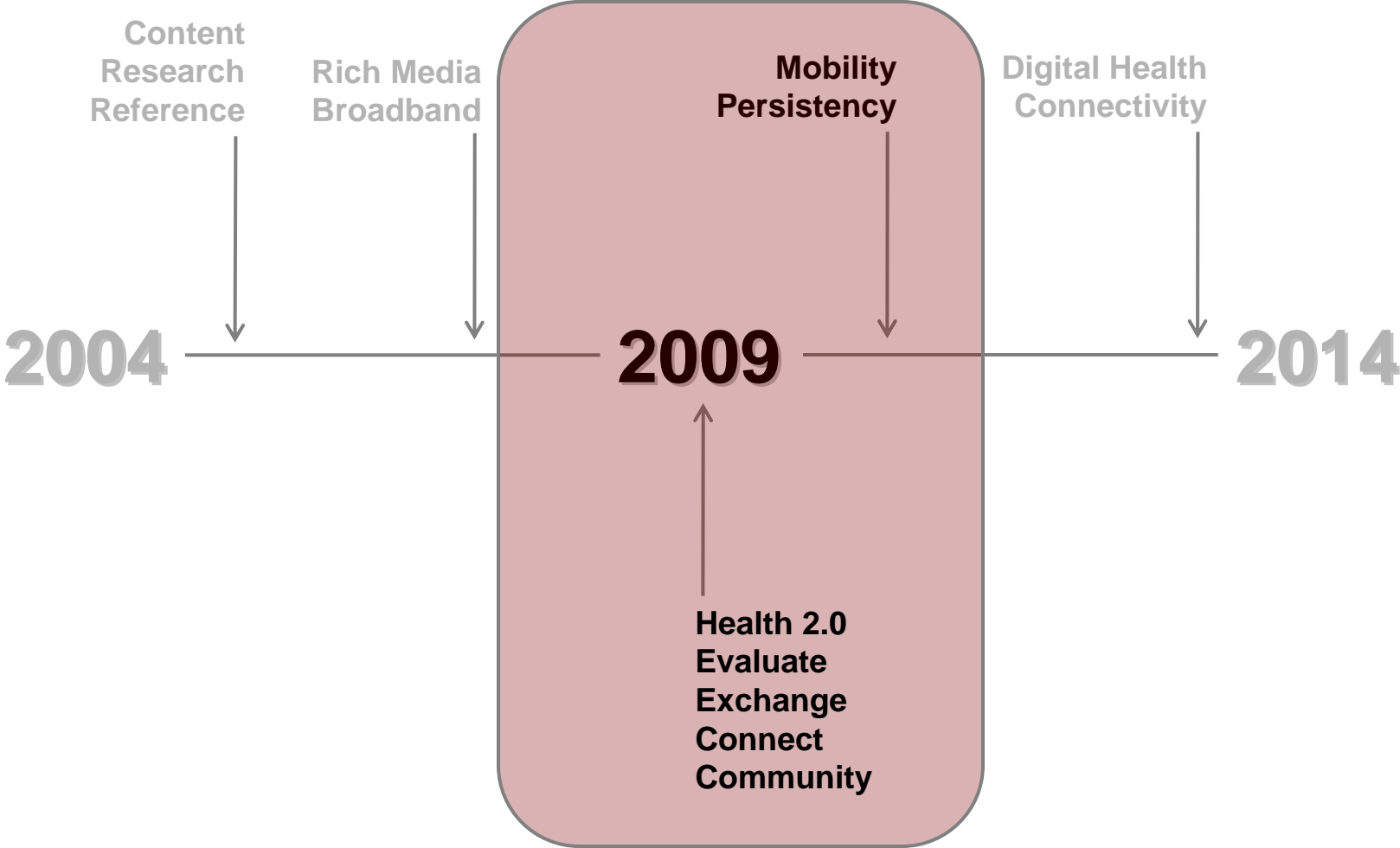
Source: Cybercitizen Health®

Majority of E-Health Consumers Now Using Internet After Seeing Doctor



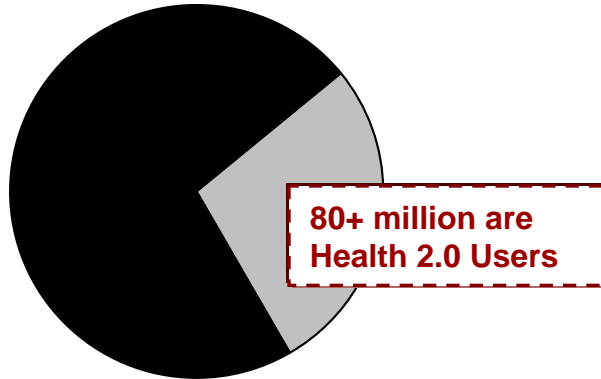
Source: Cybercitizen Health® v9.0

What is The State of the E-Health Market Today?

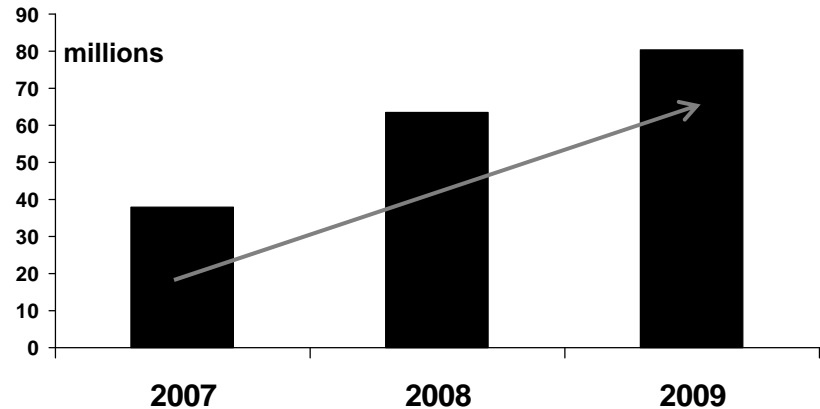


A Snapshot of "Health 2.0" Consumers Today...

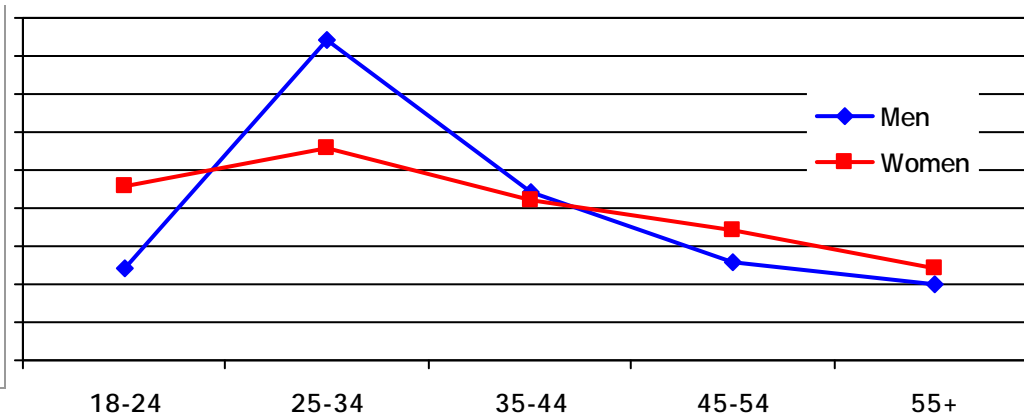
Among E-Health Consumers Today...



Health 2.0 Market Trends Over Time...



Health 2.0 Use by Age and Gender



Market Snapshot	
% Female	----
Average Age	↓
Age 18-34	↑
Have children	↑
Caregivers	↑
Discuss health info found online w/ physician	↑

Source: Cybercitizen Health®

What are the Top Sites for Health 2.0 Content?



Visitation to health-related social networking sites in the past 12 months

WebMD

Dailystrength.org

Patientslikeme.com

Realmentalhealth.com

Healthtalk.com

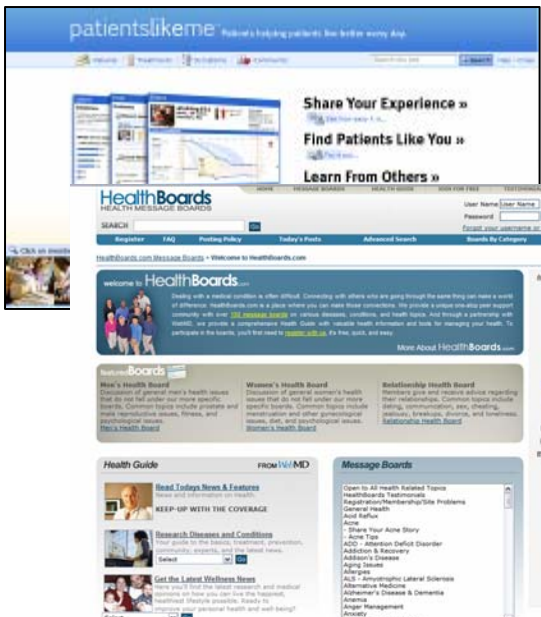
Organizedwisdom.com

ICYou.com

Carepages.com

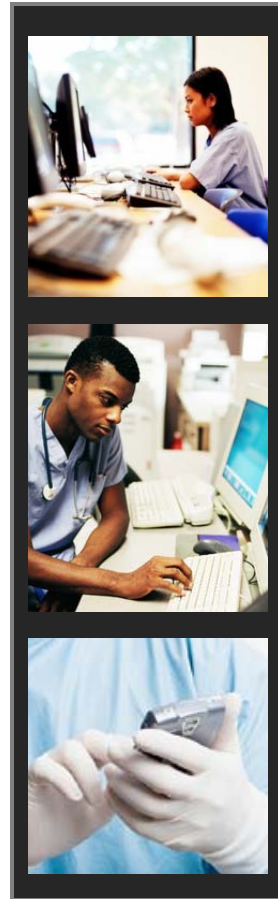
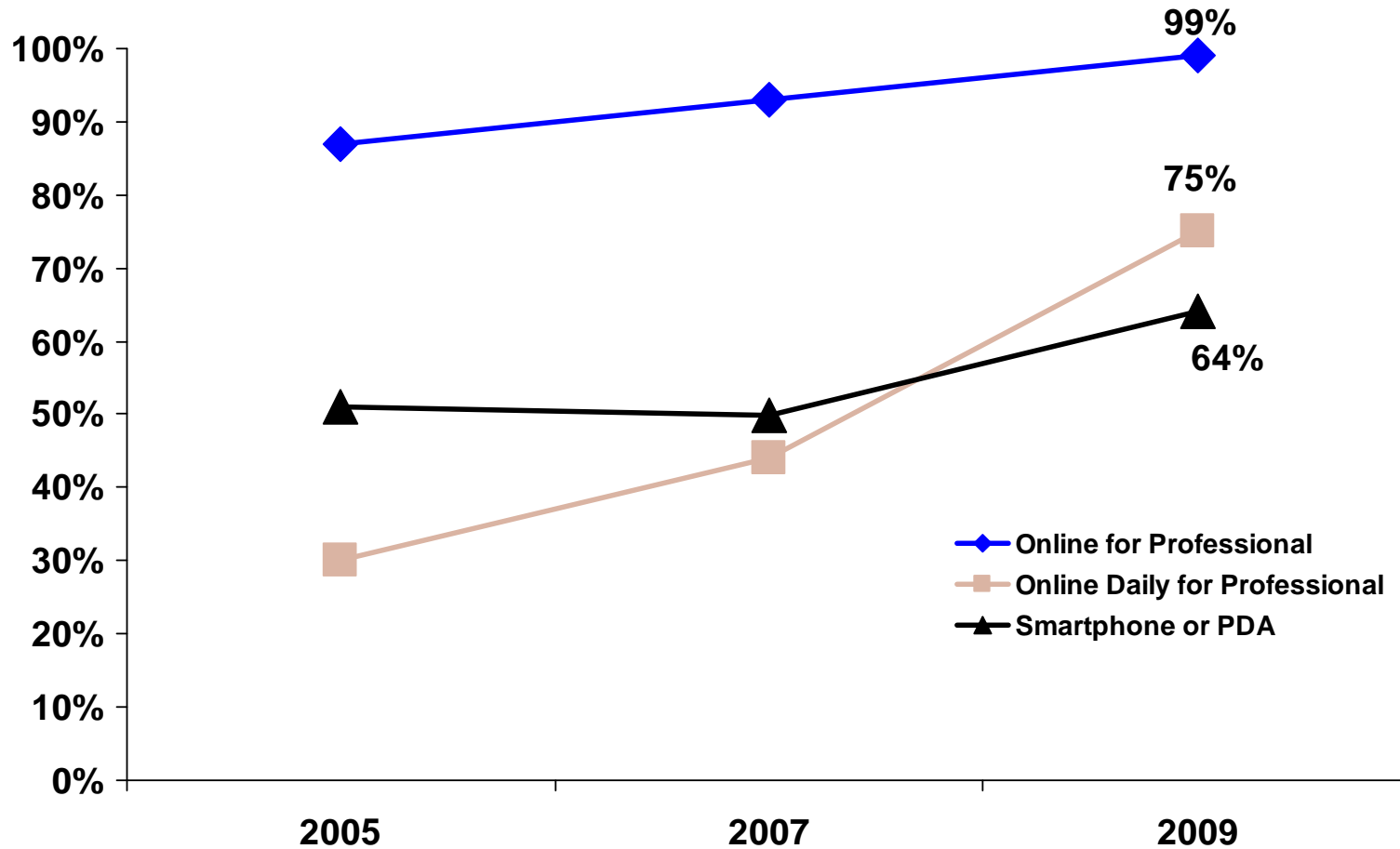
Taumed.com

Yahoo! Health/Yahoo! Groups



Source: Cybercitizen Health®

Rapid Growth in Access, Frequency, and Mobile Access among Physicians



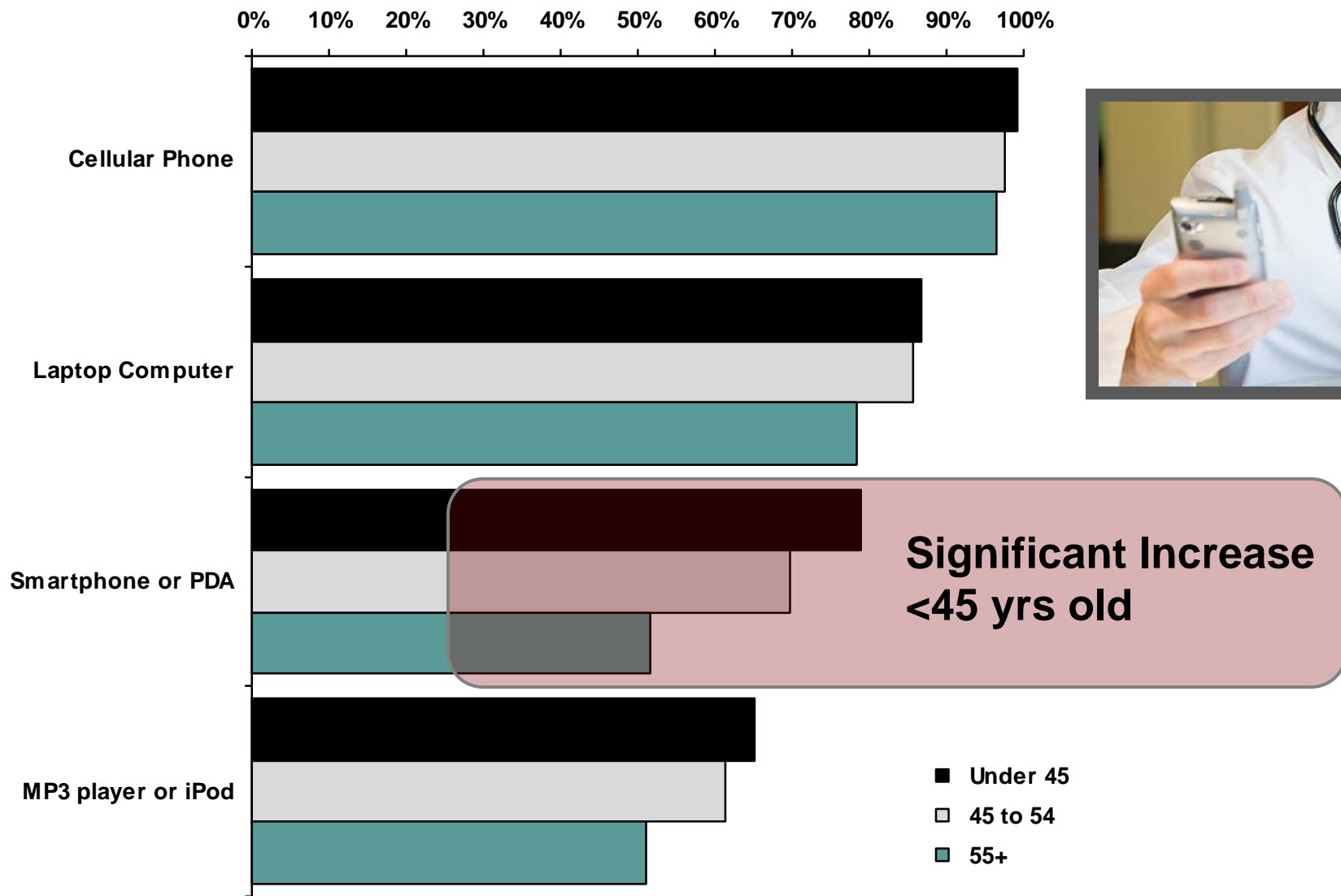
Source: Taking the Pulse®

Despite PC Preference Today, Complex Tasks will be Conducted More Frequently on Mobile Devices as Browsing Capabilities Improve



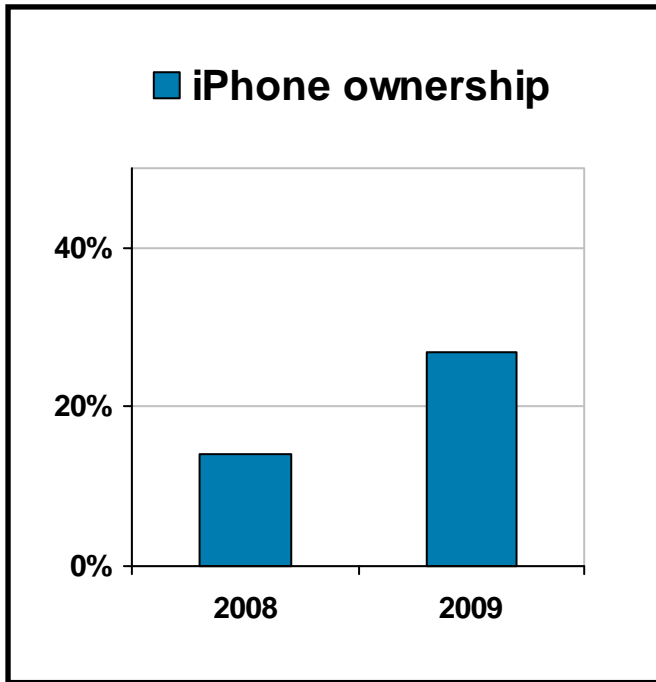
Source: Taking the Pulse®

“Smart” Revolution is Underway, Over 2/3 Physicians Carrying Mobile Web Devices



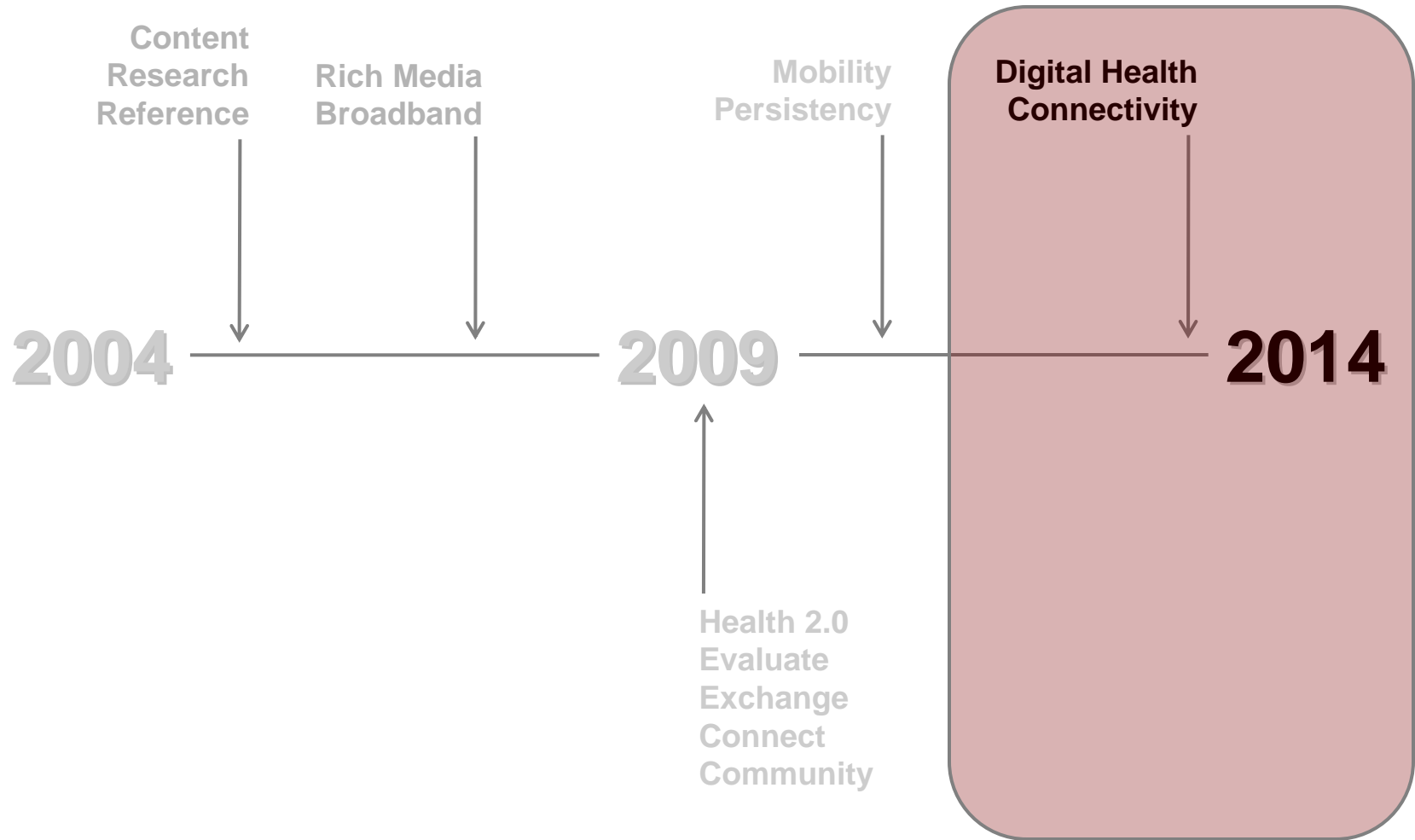
Source: Taking the Pulse®

iPhone Adoption and Medical App Store Driving Mobile Activity

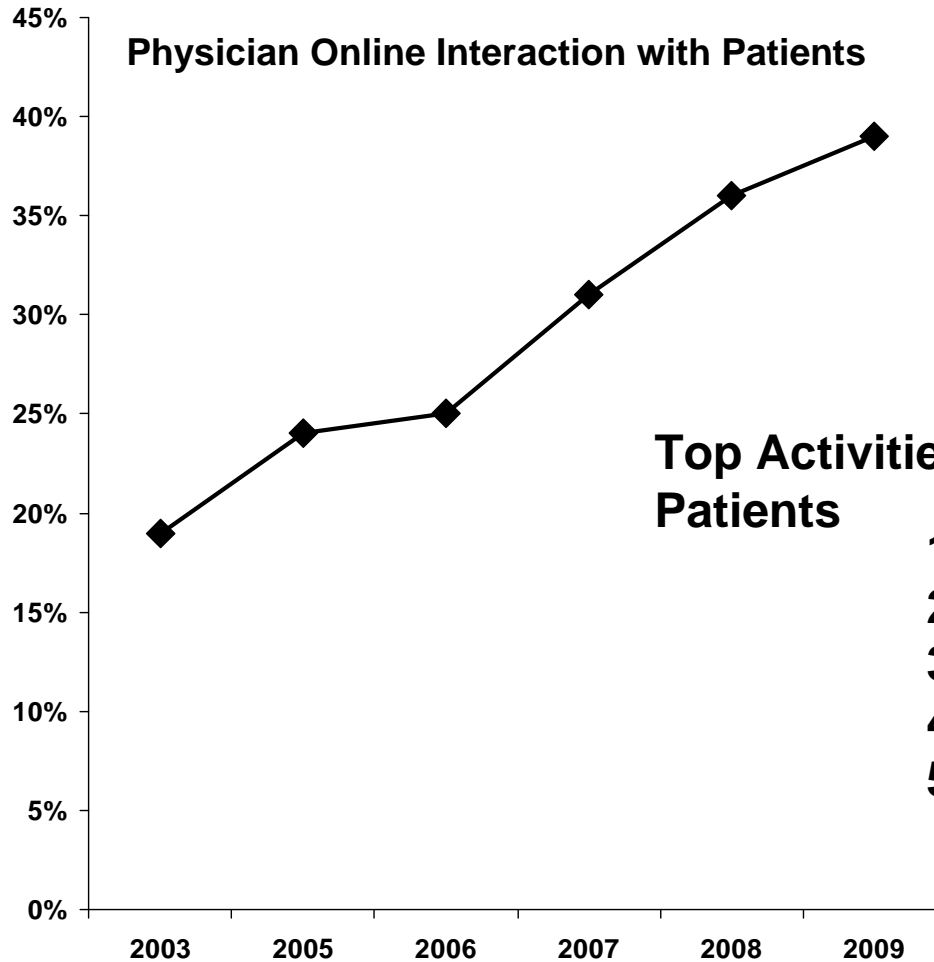


Source: Taking the Pulse®

The E-Health Timeline ... The Future Potential



Online Communication between Physicians and Patients up to 39%



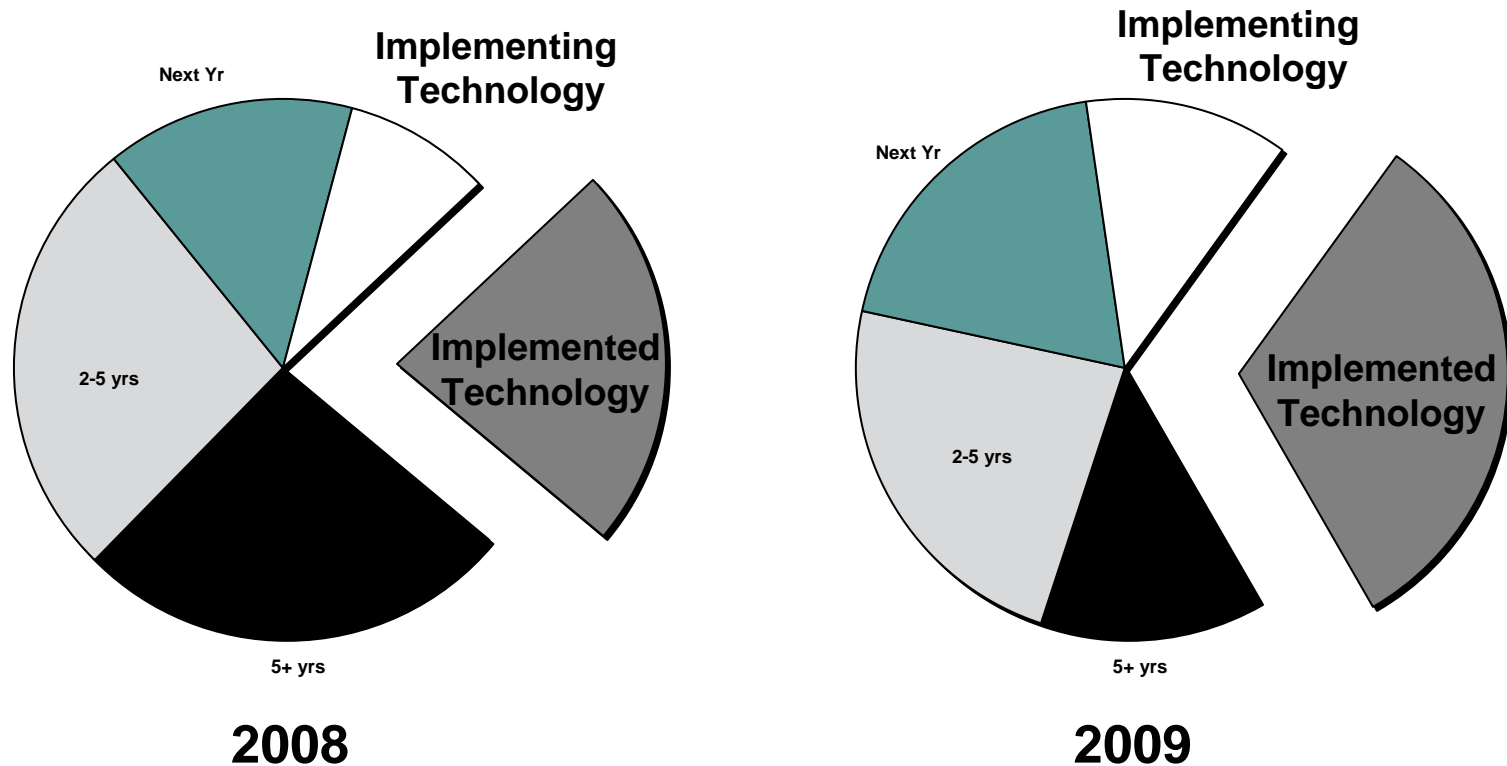
Top Activities Conducted Online with Patients

1. Answer Clinical Q's
2. Discuss Symptoms/Treatment
3. Determine if Visit Needed
4. Lab Results Notification
5. Referral Request

Source: Taking the Pulse®

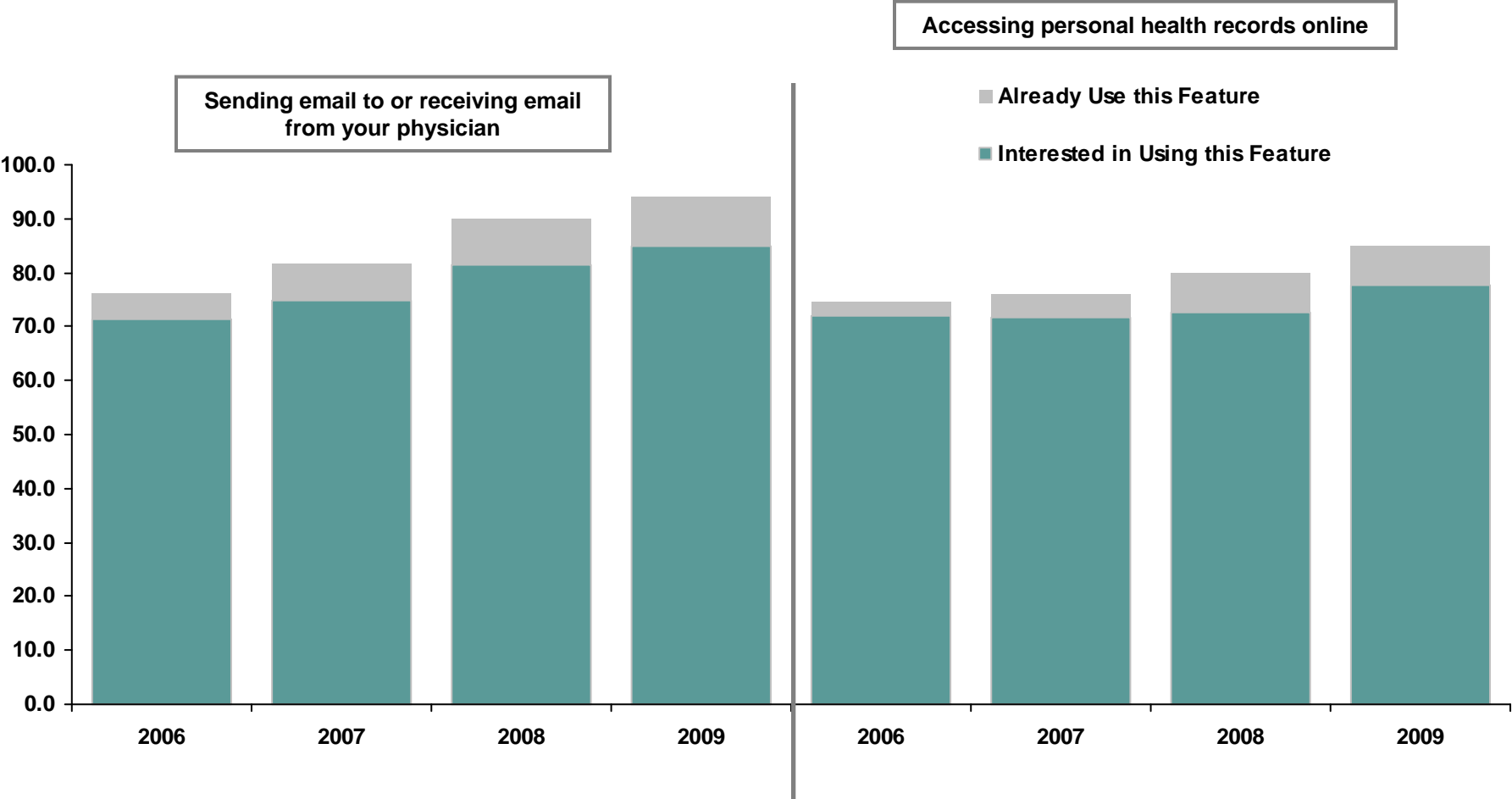
Electronic Prescribing Use (any format) Accelerated in Recent Years

When do you foresee personally adopting electronic prescribing in your practice?



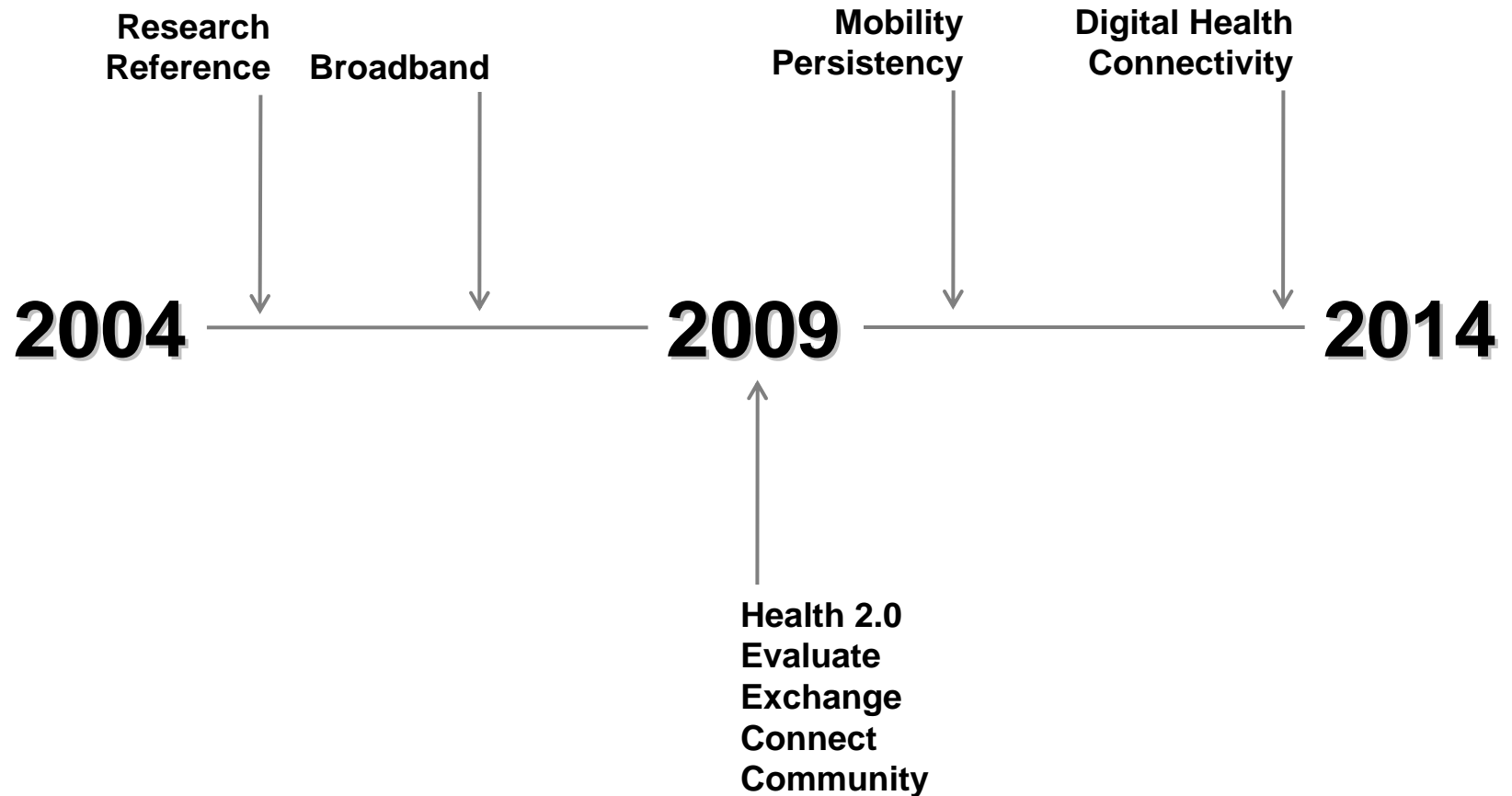
Source: Taking the Pulse®

Despite Growth in PHR Adoption, and Email with Physicians, Vast Majority of U.S. Adults Remain on Sidelines for Advanced E-Health Apps and Connectivity



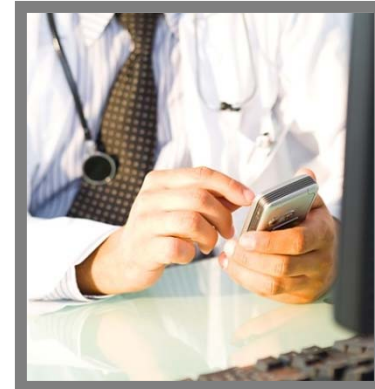
Source: Cybercitizen Health®

Recapping E-Health Progress to Date and Future Potential



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