

Introductory comments, Janice McCallum, President, GrandView Insight, Inc., Health Content07, September 24, 2007.

Thank you Russell and good morning. As Russell points out, the Health care industry is in a state of transition. Everyone from policy makers to physicians to patient to third party payers knows that the current system is unsustainable and that additional IT investments can offer efficiency gains in this sector. Just a few factoids to set the stage for today's program:

- **Healthcare is a \$2.1 trillion dollar sector of the US economy—approx. 16.5% of GDP in 2006—according to analysis by BEA and Centers for Medicare and Medicaid Services. And, the sector is forecast to increase to \$4.1 trillion and represent almost 20% of each dollar spent by 2016. (see slide on page 4)**
- **Just last week at the Health 2.0 conference, Peter Neupert of Microsoft estimated the “health search” market today at between \$500M and \$1Billion.**
- **One more factoid to emphasize how “hot” the health sector is. AthenaHealth, a Boston area health IT services provider went public last Thursday (Sept. 20) and was the most successful IPO of the year—gaining 97% in its first day. The stock price retained that 97% gain at the close on Friday.**

Debates about how to improve efficiency and standards of care in the healthcare industry often get heated because this sector affects everyone on such a personal level. Today's conference is not intended to debate policy. Instead, our objective is to help publishers gain an understanding of what the changing dynamics in the healthcare market mean to them--and to help them identify the best opportunities for investment and partnering.

There are two underlying themes of Health Content07: 1) the effect of technology on the supply of medical and healthcare information products and 2) the ramifications of a shift toward a consumer-directed health care system for medical and healthcare information providers.

To build on what Russell said, the Healthcare industry lags other industries in investment in IT and adoption of IT-enabled productivity tools. Again, we won't dwell on policy and privacy issues related to EMR and PHRs, but we will demonstrate decision-tools and productivity solutions for practitioners, consumers/patients, and the other parties that play a part in the healthcare industry. We explicitly didn't use the term Health 2.0 in any of the session titles; however, we hope to shed light on what that term *really* means to publishers. In

short, I favor a definition that simply states that Health 2.0 reflects effective exploitation of technology to produce better products and services.

When planning today's program, we chose to focus on the six themes that are listed on the cover of the program book and each theme has a related session. (Consumer-directed Healthcare; Evidence-based Medicine; Medical Content's Extreme Makeover; New Shape of Consumer Healthcare Portals; Healthcare Quality Metrics; Bringing Together Content & Technology.)

I am so pleased to say to we have assembled an amazing group of speakers who represent companies that are practicing the types of creative and market-responsive publishing that we admire. Our speaker roster includes Web pioneers, MDs, PhDs, medical journalists, healthcare publishing veterans, academics, entrepreneurs—and many who embody several of these qualifications!

You will hear from some of the industry's top thinkers about new research and analysis on consumer preferences for health information; you'll see leading EBM information tools and solutions; interact with a selection of the most popular consumer portal providers; discover the latest trends in measuring healthcare quality; and we'll wrap up the program with a presentation that offers a prescription for information therapy. A cocktail party follows the end of the program.

Some more info about our program book: The booklet includes some definitions we wrote to help clarify the terminology we use in the session descriptions. There is also a full list of attendees included in the registration book to facilitate your networking. Throughout the day, we have built in time for you the audience to interact with the speakers and we include breaks to promote networking among all the attendees. In addition, please note that we will make the PowerPoint presentations available to all attendees via our websites after the conference.

Before we introduce our keynote speaker, we would like to thank the sponsors of our inaugural conference: Desilva & Phillips, the Center for Information Therapy, Dorland Healthcare Information and Green Book Health. See the sponsor section in the book for more information about these organizations. You've met Russell. I'd also like to introduce my business partner, Laurie Webster-Saft, is part of the core team that helped plan this event. And thanks also to Roxanne Christensen, the other person who played a vital part in planning and executing this conference. And, of course, I'd like to warmly welcome each and every one of you and thank everyone here for helping to make our inaugural Health Content conference a success. Without further delay, let's move ahead with this morning's keynote presentation.

Please join me in welcoming Matt Dumas, Managing Director of NielsenHealth, a new initiative from The Nielsen Company that taps into all Nielsen resources to address the healthcare industry's information needs.

Many of you know Nielsen through its Nielsen Media Research, AC Nielsen and other widely known businesses. Nielsen has built its business by focusing on and understanding consumers.

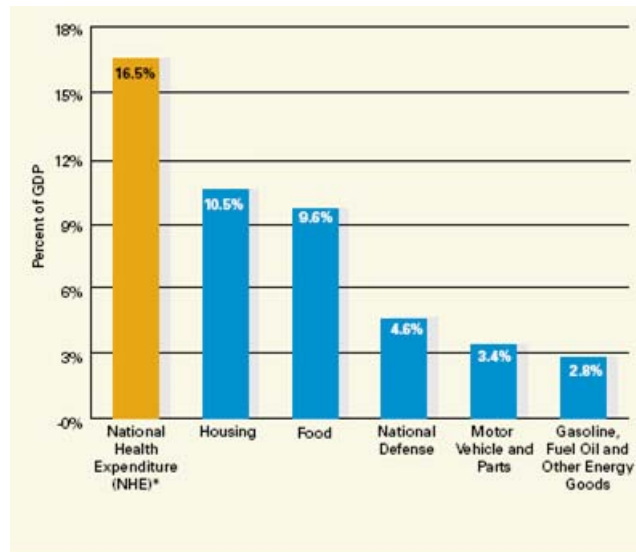
NielsenHealth was created to leverage Nielsen's vast services and offerings to provide a comprehensive view of healthcare marketing and how patients and other healthcare decision makers: pharmacists... doctors... nurses... family members... the blog community... that person on the chat board... How all these different individuals interact and respond to these messages.

Key to NielsenHealth is the view that patients and caregivers are consumers... consumers of healthcare services,... healthcare information,... healthcare products... Consumers who, just like all of us, are influenced by the multiple sources of information.

Matt's presentation today addresses these changing dynamics of the healthcare marketplace and what change mean for all of us.

Please extend a warm welcome to Matt.

Health Expenditures as % of GDP



*Annual figure for 2006 projected by Centers for Medicare and Medicaid Services.

Note: National Health Expenditure measures the total amount spent in the U.S. to purchase healthcare goods and services during the year. The amount invested in medical sector structures and equipment and in non-commercial research in the U.S. is also included. Based on current dollars.

Source: Bureau of Economic Analysis (2006), Centers for Medicare and Medicaid Services (2006)