

Competitive Landscape Analysis Sample Report

Quarter x, 2016

For:  **Diamond**

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Background and Objectives – Sample Data

The purpose of this analysis is to help [client] better understand its [product] business regarding industry size, competition, customer model preferences and general trajectory of the industry.

- Business Objectives:
 - Inform [client] management of the external environment in which [client] competes
 - Help [client] gain a more thorough understanding of its competition in the [client] industry
- Research Objectives:
 - To understand the size and landscape of the industry
 - To gain an understanding of the future of the industry
 - To identify the key arenas in which the industry operates
 - To understand the competitive landscape and key competitors
 - To use these research learnings to identify strategic implications for [client]



Executive Summary – Sample Data

Summary of Analysis – Sample Data

Industry

- Consolidation occurring amongst technology and platform providers
- Empowered consumers driving demand for more flexible telehealth options

Competition

- As industry matures, rivalry will intensify
- Weaker firms will begin to exit the industry

Competitors

- Competitor “A” has announced a “flex pay” model
- Competitor “B” recently acquired Competitor “C” and is expected to take six months to sync up offers.
- Competitor “C” customers particularly vulnerable to conversion



Opportunities and Threats – Sample Data

Opportunities

- Growth in industry due to consumer demand for more involvement
- Growing presence of remote clinicians
- Interactive knowledge bases
- New delivery methods

Threats

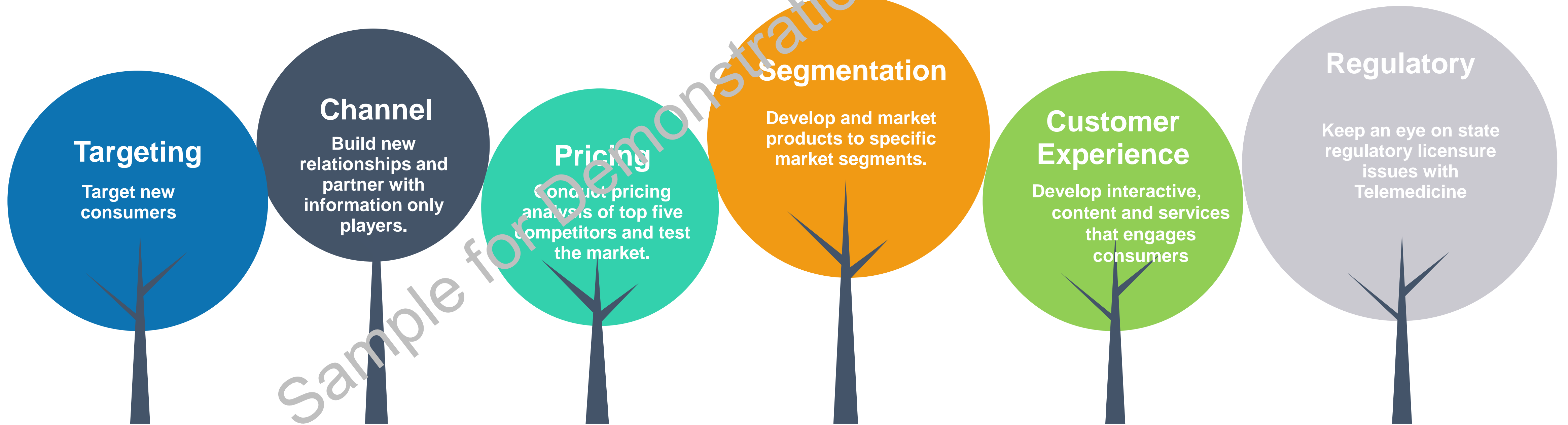
- New entrants
- Decreased requirements for face-to-face visits
- Low price/low value direct competition

Sample for Demonstration Only



NOW WHAT?

Options and Strategic Considerations – Sample Data

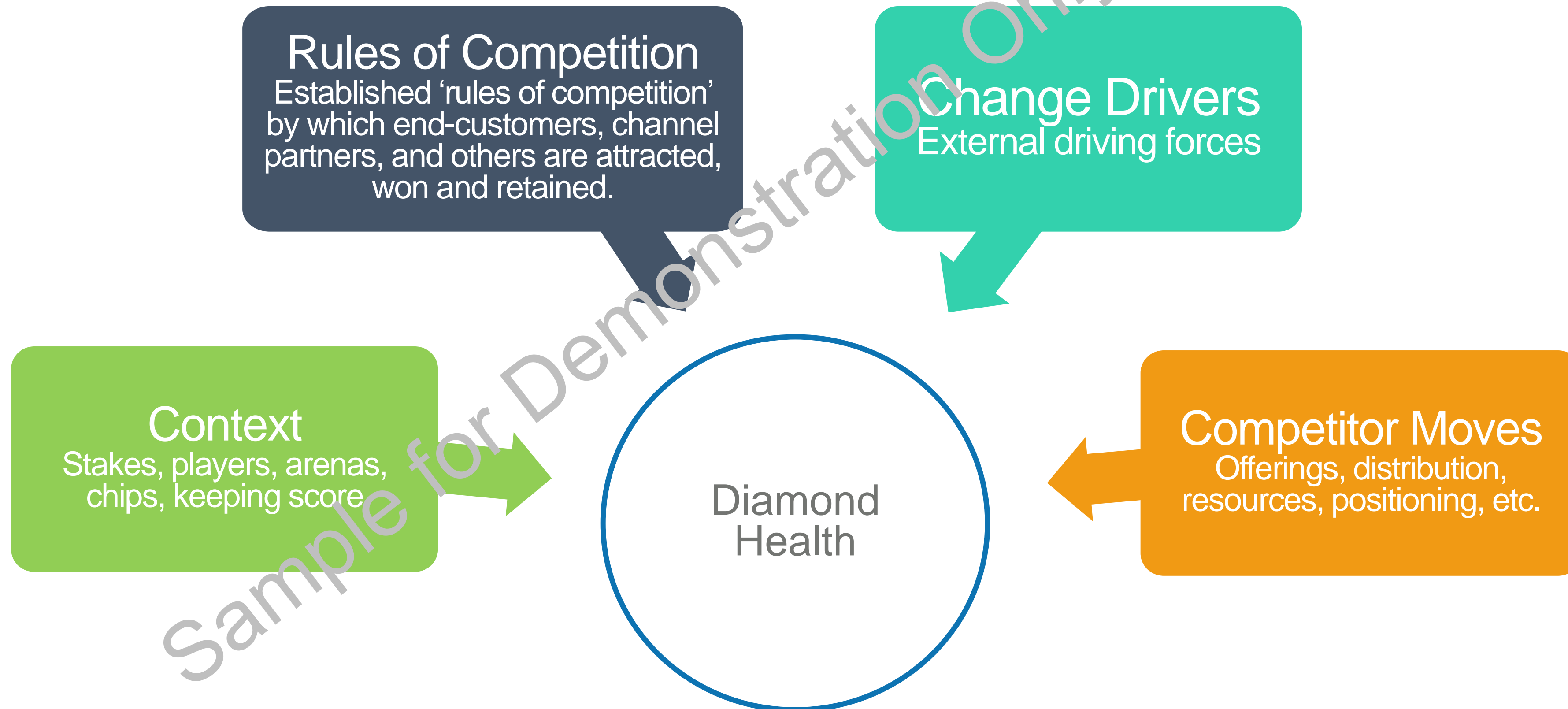


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Analysis – Sample Data

External Analysis Framework – Sample Data

How the game is played:



Players may attempt to change the game's Context or Rules of Competition at any time. They may also attempt to influence external Change Driving Forces and Competitor Moves.



Object of the Game – Sample Data

The object of the game in the Telemedicine Industry is to deliver the most value to health care consumers, employers and providers by delivering valuable content, decision support, access and experience while managing costs in a way that maximizes profits.

Working Industry Definition: Leveraging technology to maximize knowledge, experience and treatment options anytime, anywhere while empowering consumers to improve outcomes.

How the industry keeps score:



Market size in terms of revenue



Number of Telemedicine providers, employers and consumer/members

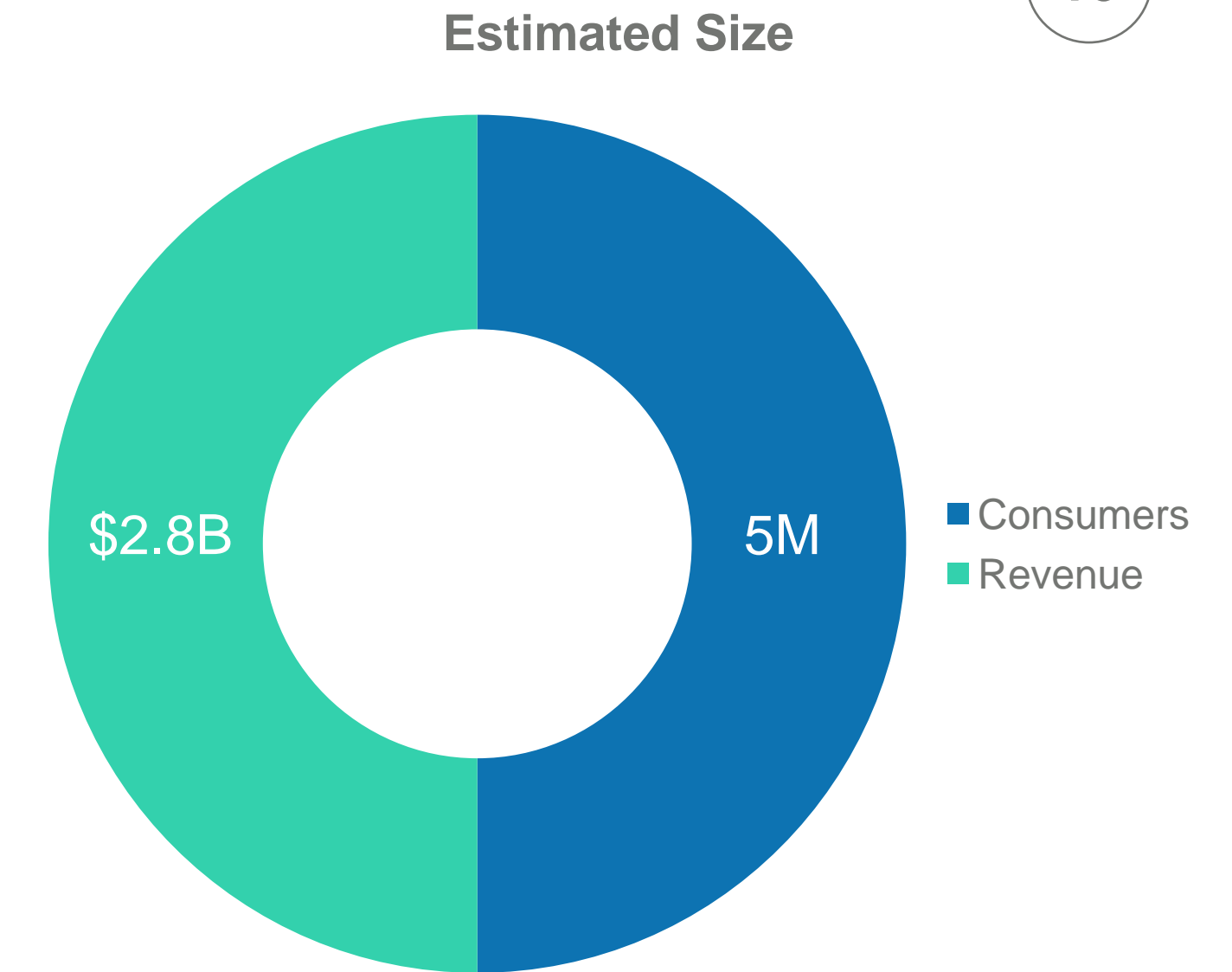


Market Share

Stakes – Sample Data

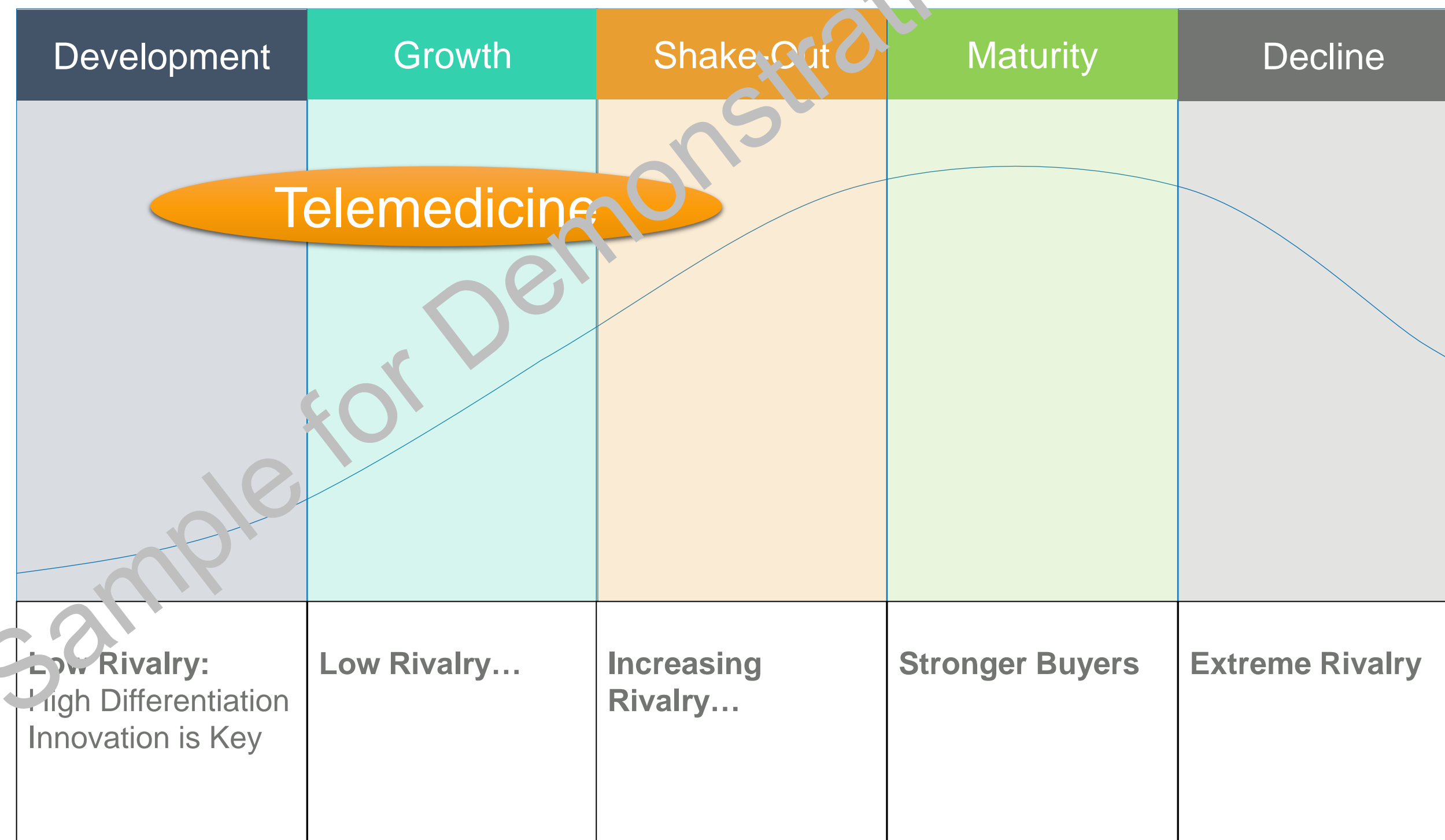
Industry size

- **Telemedicine: LoS estimates the number of players**
 - There were 450,000 Telemedicine consumers in 2010 expected to grow to 7M by 2018.
 - There are an estimated 5M Telemedicine consumers in 2016.
- **Revenue: LoS estimates the market for Telemedicine to be around \$2.8 billion**
 - In 2010, it is estimated that \$500M was spent on Telemedicine by consumers, health professionals, and physicians.
 - In 2012, \$1.78B
 - In 2016, \$2.8B



Growth and Lifecycle – Sample Data


Line of Sight estimates the industry to be entering the growth stage characterized by the existence of relatively high growth rates, low competitive rivalry, high level of new entrants, high degree of product differentiation, and price competition.



CONTEXT

Arenas – Sample Data

Where the Players Compete to Create Value



Markets

- Employers
- Providers
- Consumers



Product Groups

- Online
- In-Person



Channels

- Institutional sales (employers, consortia, universities, hospitals, pharma companies, government agencies)
- Direct sales



Geographies

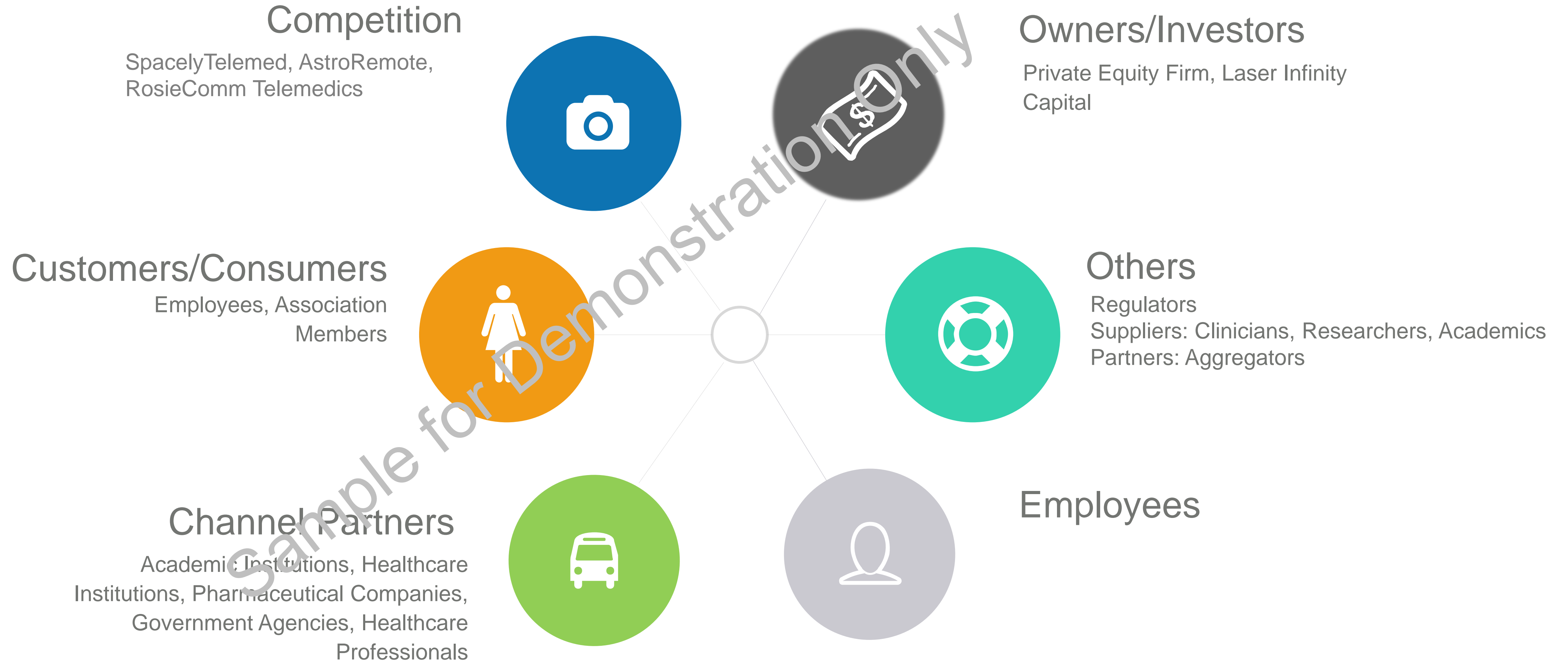
- United States
- Non-US International

Sample for Demonstration Only

CONTEXT

Players – Sample Data

Key Stakeholder Groups



Chips – Sample Data

Assets possessed and the capabilities they enable

Assets

- Clinicians (T)
- Health-related content (T)
- Reputation for quality information (D)
- Relationships with healthcare institutions (T)
- Human resources (T)
- IT resources (T)
- Financial resources (T)
- Brand recognition (D)

Capabilities

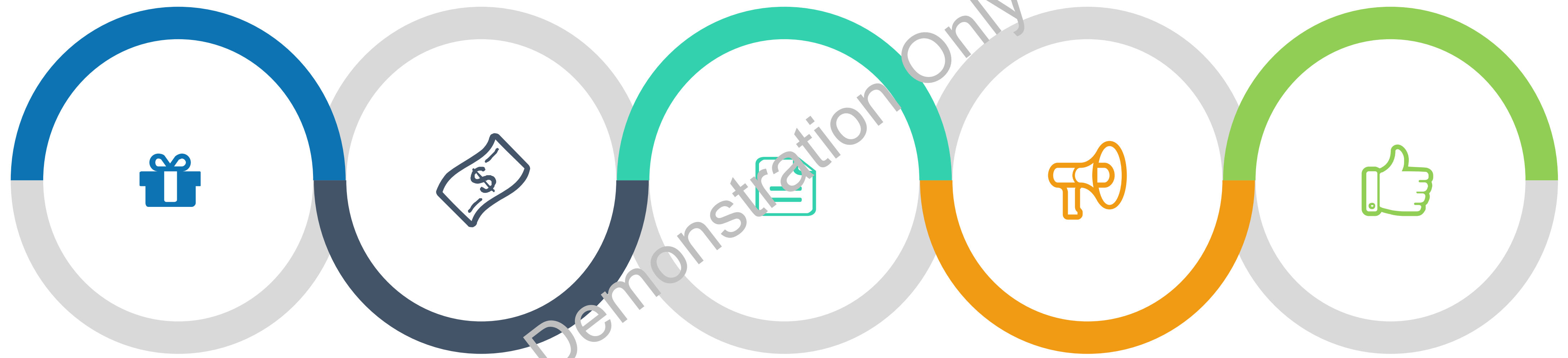
- Ability to offer up-to-date, peer-reviewed medical decision diagnoses (T)
- Ability to offer second opinion services (T)
- Ability to continually develop new products and deliver them in new formats (D)

(T) = Table stakes. (D) = potential differentiator



CONTEXT

Rules of Competition – Sample Data



Reputation

Reputation for providing high quality Telemedicine products and services that are key for procuring employers, hospitals and healthcare providers

Price + Bundling

Direct to Consumer players compete on price, while associations bundle offerings with membership

Engagement

Follows technology adoption models

Customer Experience

Ease of use and access

Reporting

Administrative reporting and tracking capabilities

Trends and Developments – Sample Data

Key Trends



Rising Health Care Costs

The cost of health insurance in the United States is a major factor in access to health coverage. The rising cost of health insurance leads more consumers to go without coverage and increase in insurance costs and accompanying rise in the cost of health care expenses has led health insurers to provide more policies with higher deductibles.



Empowered Consumers

An **e-patient** is a health consumer who participates fully in his/her medical care. Sometimes referred to as an "internet patient," e-patients see themselves as equal partners with their doctors in the healthcare process. E-patients gather information about medical conditions that impact them and their families, using electronic communication tools.



Growth in Remote Patient Care

Patients are increasingly receiving care away from traditional healthcare settings. While this may offer an opportunity for new offers, it may also increase the pressure for all states to mutually recognize licenses from other states. This could cause pressure to eliminate the requirements for Telemedicine in all states. Conversely, it may put pressure on states without Telemedicine requirements to implement them.



Technological Innovation

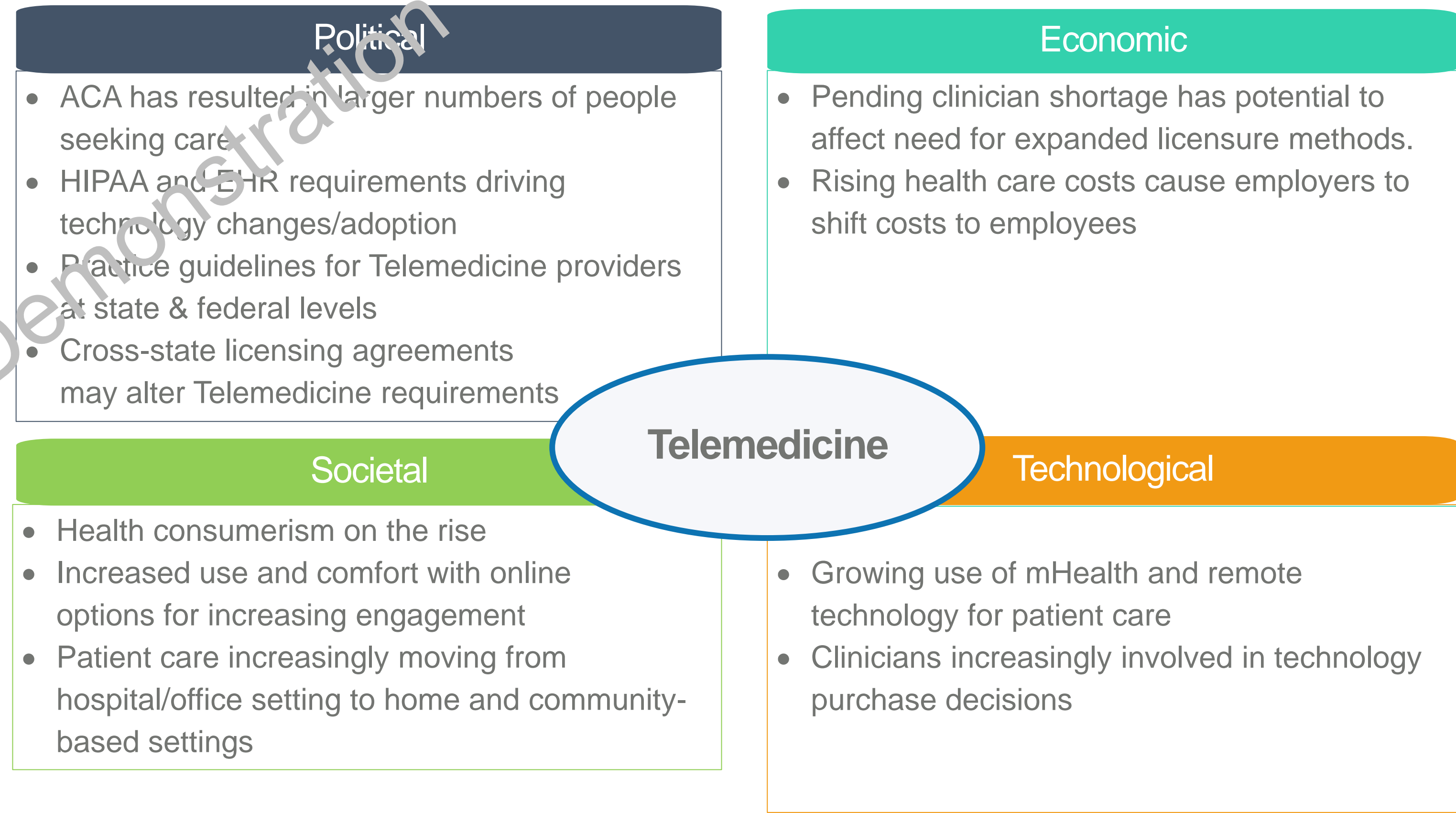
The practice of medicine and public health is expanding rapidly by the adoption of cloud-based mobile devices such as smart phones and tablets for health services and information, but also to affect emotional states. The mHealth field has emerged as a sub-segment of eHealth, the use of information and communication technology.



Industry Change Drivers – Sample Data

- Major drivers of change in the industry include changes in the demand for Telemedicine technology and services, the supply of providers to fill those needs, shifts in how healthcare is delivered, and the resulting changes in patient/doctor interactions.

- Increase in demand
 - ACA
 - Aging population
 - Growth of rural and underserved urban populations
- Changes in technology & privacy laws
- Use of technology to deliver care
- Use of technology for content delivery

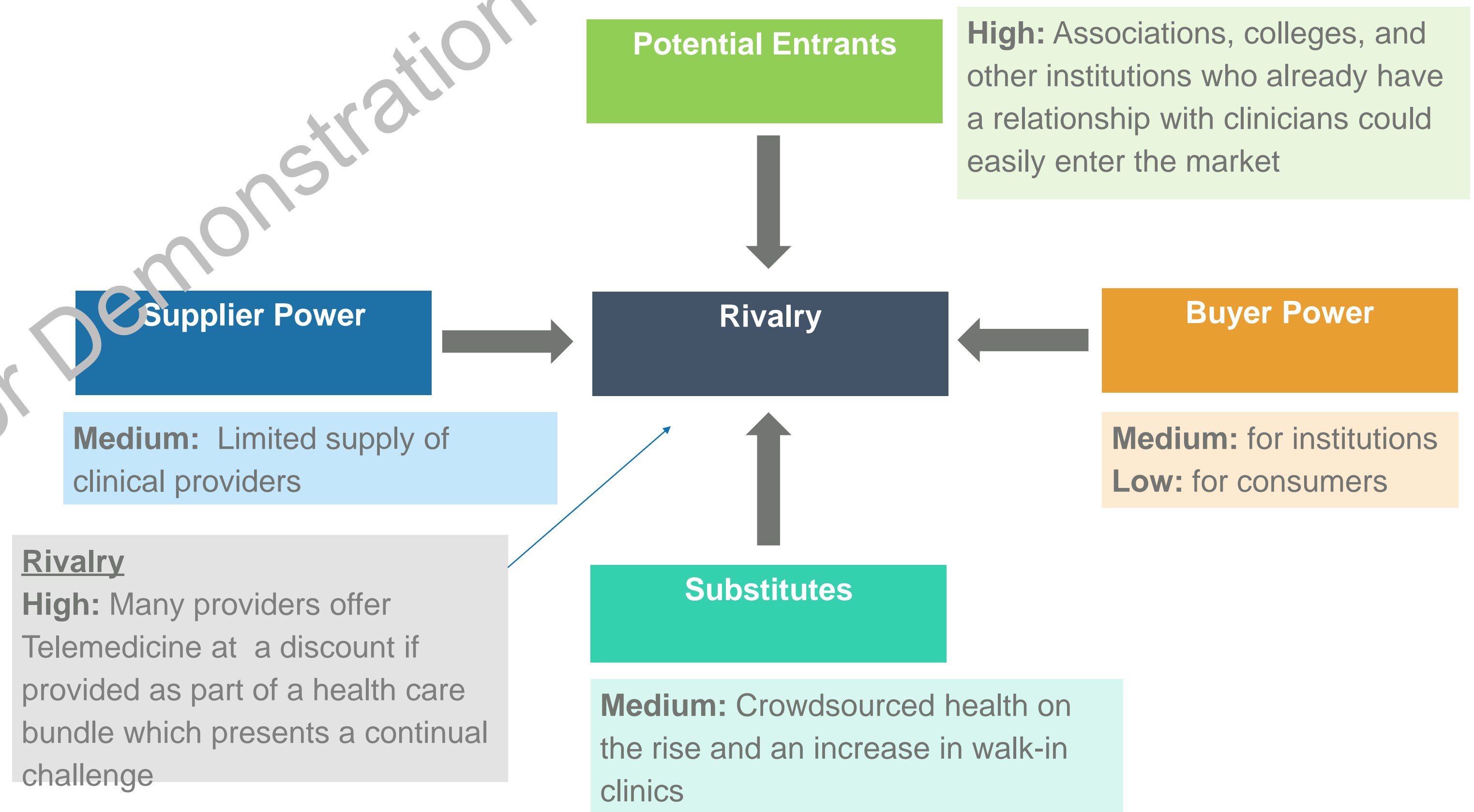


Competitor Moves and Response – Sample Data

- The field of Telemedicine is becoming more competitive. There is a constant threat of new entrants.

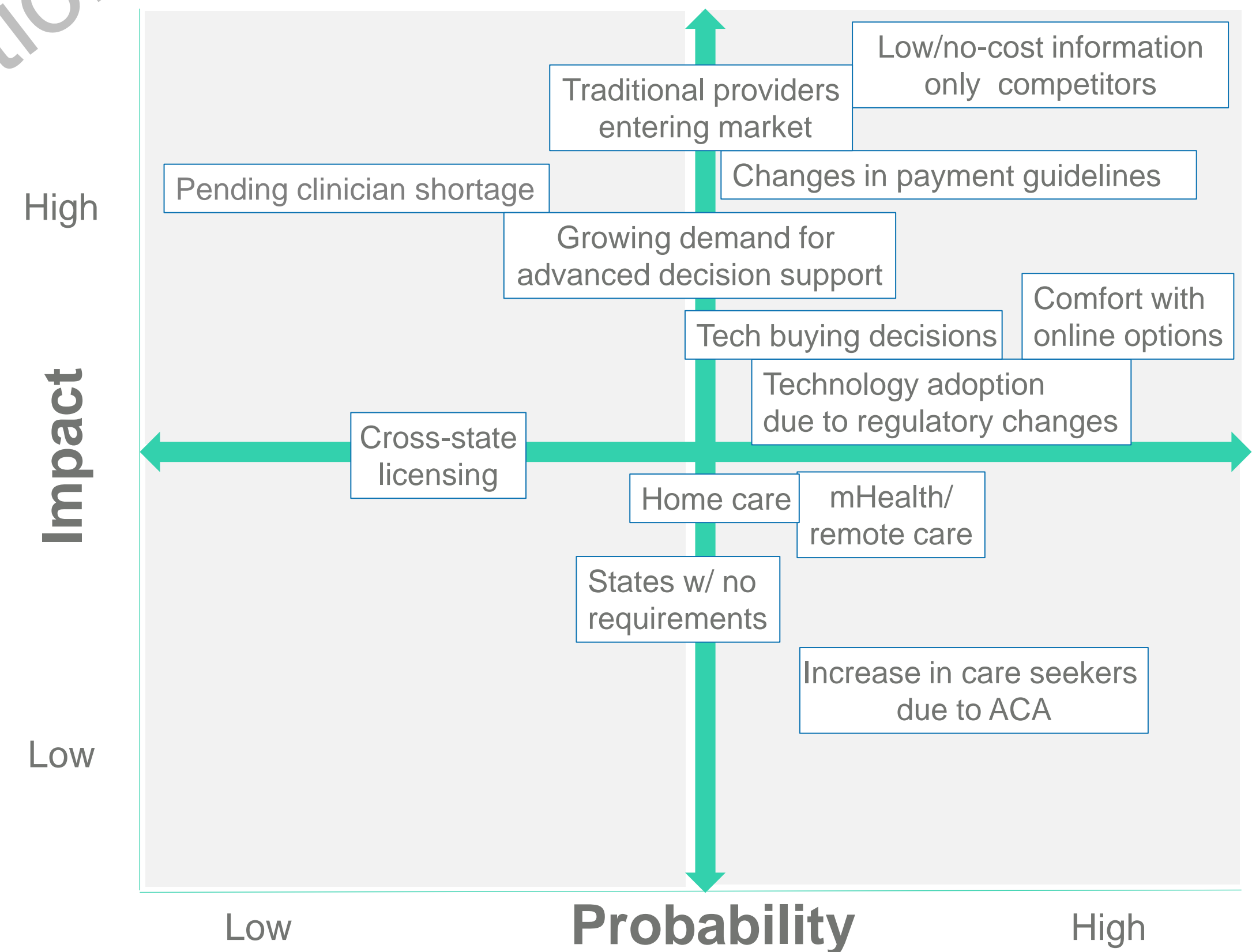
- Strategic moves:

- Positioning: Anytime, anywhere medicine on the consumer's terms
- Resources: state-of-the-art technology as well as a trained staff of clinicians and support people
- Offerings: Those who offer Telemedicine at a low price point will likely seek to gravitate to the very large employers
- Distribution: Institutional sales or direct



Focus and Disruption – Sample Data

- While many of the current forces will continue into the three-year future, the pace of change in the space will keep accelerating. New therapy discoveries, new technology, new diseases/ conditions, new care delivery venues and the evolving role of nurses will continue to drive demand for Telemedicine
- Low-cost/low-value competition continues to force industry commoditization as Telemedicine is the norm
 - The need for differentiation will become even more acute in order to maintain profitability
- Adoption of technology and analytics drives Telemedicine demand
- Key disruptors:
 - Technology Advances
 - Changing Consumer landscape



Sample for Demonstration Only

Intelligence (Ongoing Monitoring)

Diamond

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Home

Announcements and Highlights

Welcome to our Sales Intelligence Platform

Our market intelligence platform is designed to help our sales efforts by providing information and insight about our competition, prospects and customers, and the general market environment. Market observations from the sales force and others in our organization are continuously curated and analyzed to identify trends that represent opportunities and threats.

If you have a market observation to contribute, click on 'Contribute' in the left hand menu.

If you have any questions or need assistance, contact Amy in Sales Operations (amy@diamondhealth.com) or Jennifer at Line of Sight Group (jennifer@lineofsightgroup.com)

Most Recent Intelligence

[Special Section: On Eve of Repeal, Savings for Medical Costs Can Fall Short_3/4/2016](#)

[Trade Show Observation by Amy Marketing-Wiz_11/20/2015](#)

[XYZ Doctor to acquire Subiro_11/2/2015](#)

[Penion Launch Marketing Heavily to LG Accounts - Amy Salesperson_10/25/2015](#)

[XATA Purchased New Presses_10/15/2015](#)

[WebDOC developing cost calculator from Randy SalesGuy_8/15/2015](#)

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Line of Sight's Strategic Intelligence Program

Monitoring

+

Curation

+

Knowledge Management

+

A Powerful, Customized Intelligence Platform

Build and efficiently manage your organization's strategic knowledge asset.

Customized. Organize information around your business objectives and key intelligence topics. You define your markets and competition.

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National Account

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US Northeast Re

US Southeast Re

US Western Regi

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Social networking Information

Win/Loss Analysis

XYZ DOC

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Filter By Company: --- Pick One ---
Filter By Industry: --- Pick One ---
Filter By Market: --- Pick One ---
Filter By Sales Territories: --- Pick One ---
Count: (22)
Filter

Company	Description
American Corp.	American Custom Publishing Corporation (ACP) is a national publishing comp located in Libertyvill...
Centers for Medicare and Medicaid Services (CMS)	The Centers for Medicare and Medicaid Services (CMS), formerly the Health C Financing Administrat...
Diamond Health Publishing	This is our company.
eCincinnati Clinic	eCincinnati Clinic is a web-based extension of the Cincinnati Clinic's role as one America's most...
HealthAtoT	HeathAtoT.com is a comprehensive, well-integrated health and medical resou developed by health ca...
HealthMarks Inc.	Colorado-based HealthMarks Inc. is the leading healthcare ratings organizati providing ratings an...
MedicalMAP.org	Consumers Union is a non-profit publisher of consumer reports.

Company
Companies - XYZ Doctor Corp. **
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XYZ Doctor Corp. **

Overview

Profile Type: Both Print,Online
Address: 111 318th Avenue, 71st Floor
Country: USA
Phone: 212-601-8799
Toll Free: 1-800-112-6789
Website 1: www.xyzdoctor.org
Website 2: www.xyzdoctorhealth.org
Description: XYZ WebDoctor is a leading provider of health information services, serving consumers, physicians, other healthcare professionals, employers and health plans
Founded: 2005
Incorporated: 2005
Org Type: Business Unit
Ownership: Public
Ownership Detail: XYZ DOC Health's majority owner is XYZ Corp, which owns 85.6%. XYZ also represents 97 percent of XYZ Doc's market capitalization.
11 - XYZ Shares Slip on Revenue Forecast, AP Newswire
Stock Exchange / Symbol: Nasdaq/XYZMD
Revenue Range: \$100,000 - 499,999
Revenue Range Detail: The company revenues are in the \$250 million range. See financials below.
Notes:

Intelligence (13)

Trade Show Observation by Amy Marketing- Wiz 11/20/2015
XYZ Doctor to acquire Subiro 11/2/2015
Renion Health Marketing Heavily to LG Accounts - Amy Salesperson 10/25/2015
View All

Print Competitors (1)

Turnpoint Health Internal

Online Competitors (1)

WorldDoc

Both Print, Online (1)

Subiro Internal
Subiro is a subsidiary of WebDoc. Extremely close partnership exists here.

Industry (5)

Consumer Online Health Decision Support Competitor
Direct health and medical insurance carriers Competitor

Collaborate, Engage Your Organization. Enable others across your organization to contribute and share insight. Integrate field and human intelligence. Email intelligence briefs broadly or alerts to specific executives.

Intelligence
 Intelligence - XYZ Doctor to acquire Subiro
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XYZ Doctor to acquire Subiro

Summary

Looking to expand on its footprint in the health care information field, WebDoctor Health Corp. has entered into an agreement to buy Subiro, LLC, a provider of health care information support applications to large employers, health plans and financial institutions. WebDoctor will pay \$34 million in cash on the closing date, which is expected to occur before the end of the year, and \$26 million in stock or cash two years after that closing date, subject to conditions.
[Click Here for More....: Healthcare IT News](#)

Documentation

Date:	11/2/2015
Validity:	3
Significance:	3
Type:	M&A
Author:	Rhonda
Last Updated By:	Steve Schulz

Key Topics_General (3)

- [Personal Health Records \(PHR\) **](#)
- [Health Privacy Legislation](#)
- [WebDOC Primary KITT](#)

Both Print,Online (2)

- [Subiro XYZ Doctor Corp. **](#)

General Pubs - online (3)

- [WebDOC Consultant Network **](#)
- [WebDOC Private Portal Services](#)
- [WebDOC Professional Network](#)

General Pubs - Printed (2)

- [WebDOC Publishing Services](#)
- [WebDOoctor Health Books](#)

Snapshot Report (1)

- [Subiro Inc. Integration into WebDoc **](#)



Weekly Competitor Highlights
 April 30, 2014

Below are market observations added for this week. Note that the WebDoctor acquisition will increase the company's online publishing presence.

Contents

- [Key Competitors](#)
 - [Renion Health Marketing Heavily to LG Accounts](#)
 - [XATA Purchased New Presses](#)
- [General Competition](#)
 - [WebDoctor to acquire Subiro](#)

Key Competitors ^ top ^

Renion Health Marketing Heavily to LG Accounts
 10/25/2015

According to several field reports, Renion Health Marketing (RHM) is heavily marketing to large accounts (e.g., Bank, American Airlines, Target) with a focus on digital marketing. RHM is well known about the details of the program.

Editor's Notes:
This kind of service is exactly within your wheelhouse. Please keep your eyes open for details and send them to me.



Monthly Competitive Summary
 March 2016

Monthly Highlights

WebDoctor made two significant moves this month. The company hired John Manger as its new SVP of sales. John has significant national sales experience and will likely push the company's national expansion efforts. WebDoctor also acquired Subiro, which increases their online publishing content by about 15%. It's expected that the company will keep pricing level to start in an effort to bring on new clients.

TurningPoint began utilizing social networking in an effort to better expand its brand recognition and improve its customer experience. The company will be use Twitter and Facebook to hold promotions and communicate with customers.

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- [Key Competitors](#)
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 - [WebDoctor to acquire Subiro](#)
 - [HEALTH CORP, WebDOC merger called off](#)
 - [WebDoctor Hires New Key Executive](#)
- [General Competition](#)
 - [Renion Health Marketing Heavily to LG Accounts - Amy Salesperson](#)
 - [WorldDoc Recruits Joe Bisson for Vice President of Sales](#)
 - [TurningPoint Health to Integrate Social Networking](#)
 - [XATA Purchased New Presses](#)
- [Competitive and Market Developments](#)
 - [Power to the People](#)

CONTACT US

Reach out with questions or for further discussion!

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