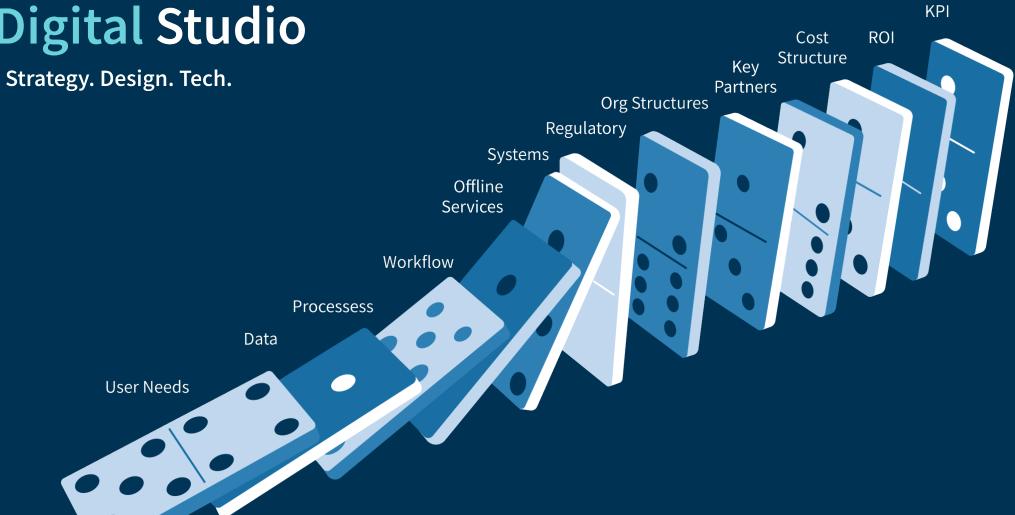
ZS Digital Studio



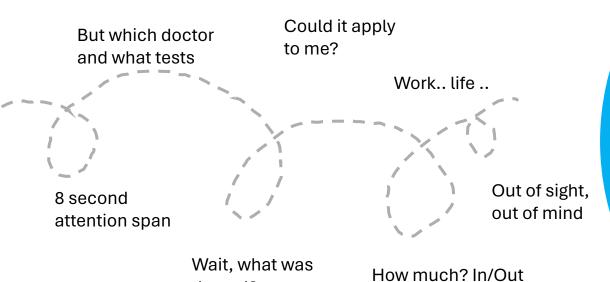
Talk to your doctor today



Awareness | Intent

DTC Rol

Navigating the **Action-Intention** Barriers



of-network

that ad?

I saw this



Action | Outcomes Revenue

DTC telemedicine today only addresses needs of ~1% of patients

The Spectrum of Patient Preference¹





Prefer any Virtual Visit

Ready to conduct telemedicine now virtually and pay out of pocket

Prefer an Insured Virtual Visit

Ready to conduct telemedicine if covered by insurance



Prefer a New In-Person Provider

Ready to talk to a new provider in person



Curology

NURX.





PlushCare

Current solutions only address 1%-3% of patients



Prefer an Existing Provider

Ready to talk to existing provider in person

Not Ready to Talk to Provider

Open to ongoing education and nurturing

Survey shows that out of patients who had at least 1 telehealth visit in the last 6 months, 88% were with their own HCP²

^{1.} Informed by Ostro research

^{2.} Source: ZS COVID-19 Patient Research

The information overload and the lack of personalization on websites aren't conducive to action.

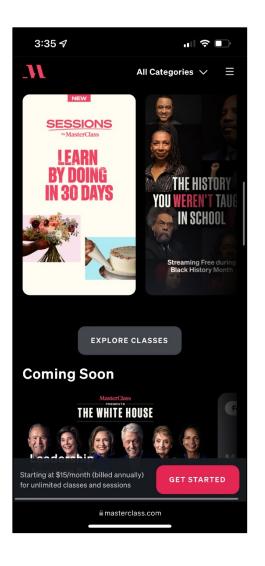


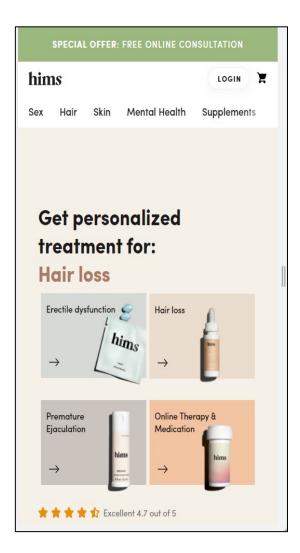
92% of consumers don't make it past the home page.

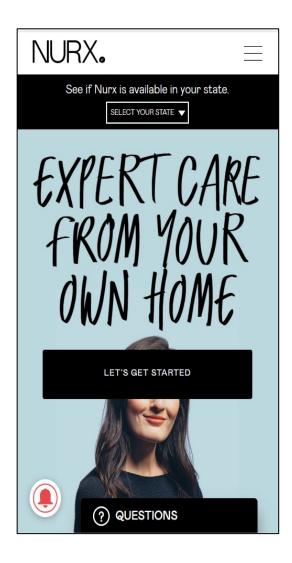
Reactive websites and static apps that leaves the cognitive burden of decision with users or doesn't integrate the channel for action fails.

Digital Front Door is a way to leverage data to personalize experience and meet consumers where they are

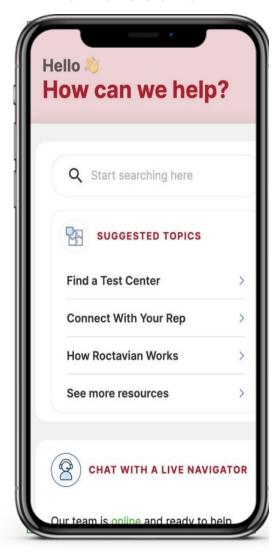




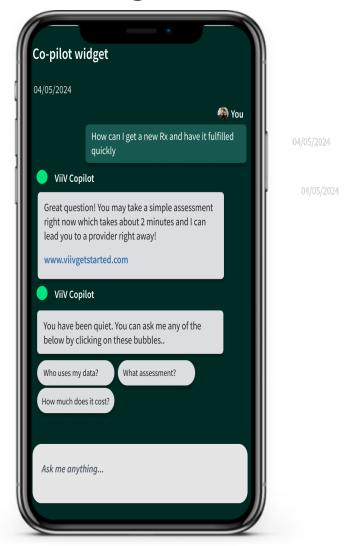




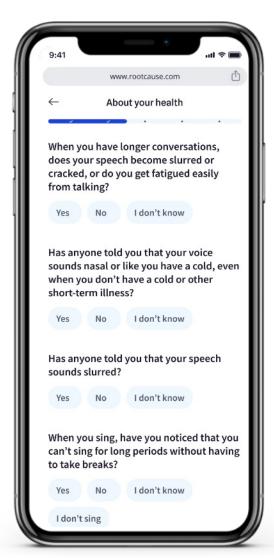
Al indexed self-education and search



Tech-enabled care navigation



Evidence based selfassessments



Intentional Patient Engagement directly affects business outcomes



