



# TELEHEALTH TRENDS SHAPING THE POST-PANDEMIC HEALTH ECONOMY

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7/2021

# Today's Outline

## Topic Highlights

- I. 2020 Volume Declines
- II. Telehealth Utilization
- III. Economics and the Future of Telehealth

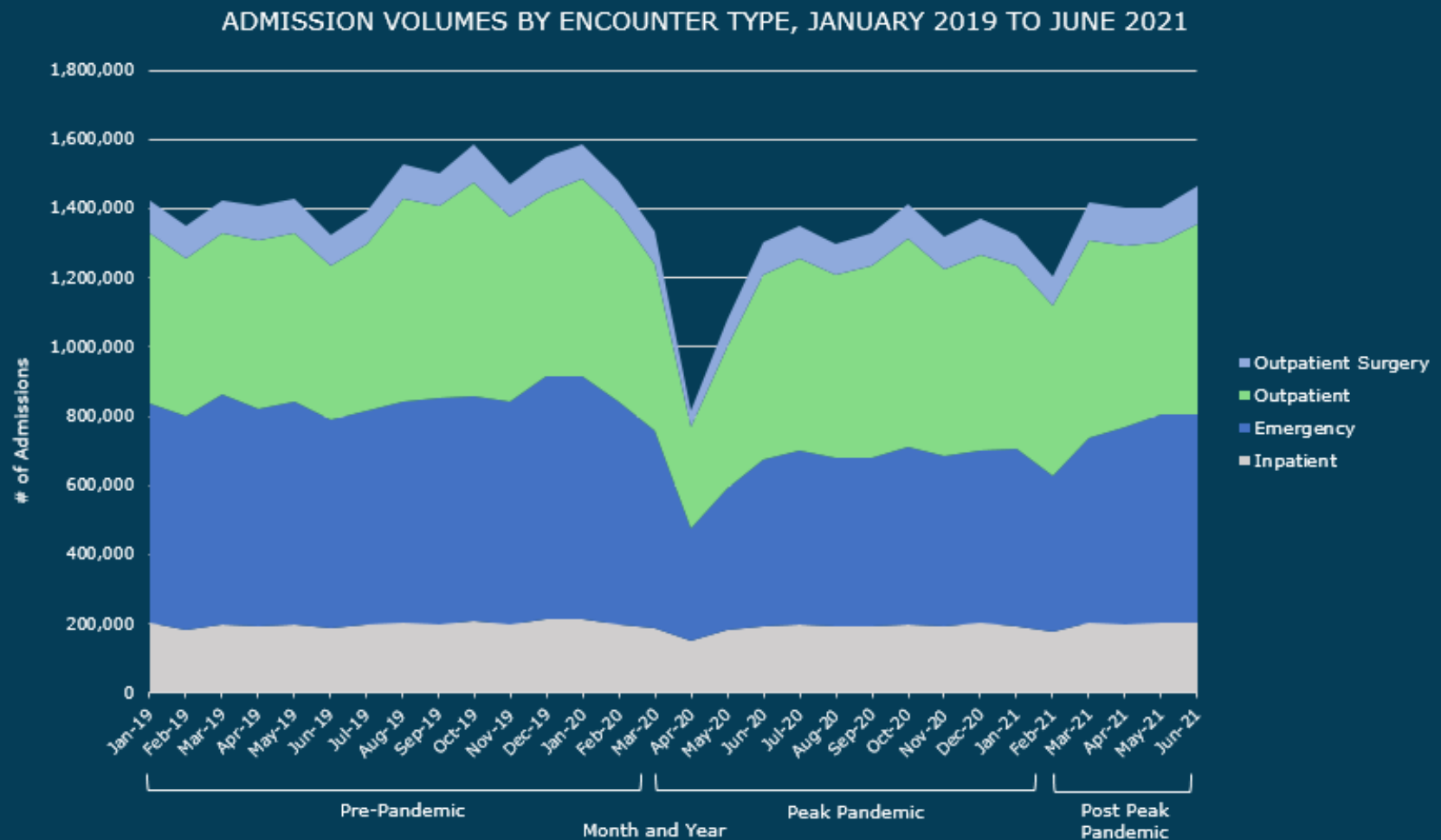


**ABOVE ALL ELSE, WE ARE  
COMMITTED TO THE CARE  
AND IMPROVEMENT OF  
HUMAN LIFE.**

DR. THOMAS FRIST, SR.

# 2020 Volume Declines

Encounters were lost, not delayed.





**42.2%**

DECREASE IN ENCOUNTERS  
APRIL 2019 TO APRIL 2020

**20.6%**

DECREASE IN TOTAL  
EMERGENCY DEPARTMENT  
ENCOUNTERS, 2019 TO 2020

The background image shows a healthcare professional in a white lab coat, seen from the side, gesturing with their right hand while speaking. They are interacting with an elderly woman with short white hair and glasses, who is visible on a laptop screen. The woman on the screen is also gesturing with her hand. The scene is set in a bright, modern office or clinic environment with a window and a potted plant visible in the background. The entire image is overlaid with a semi-transparent blue filter.

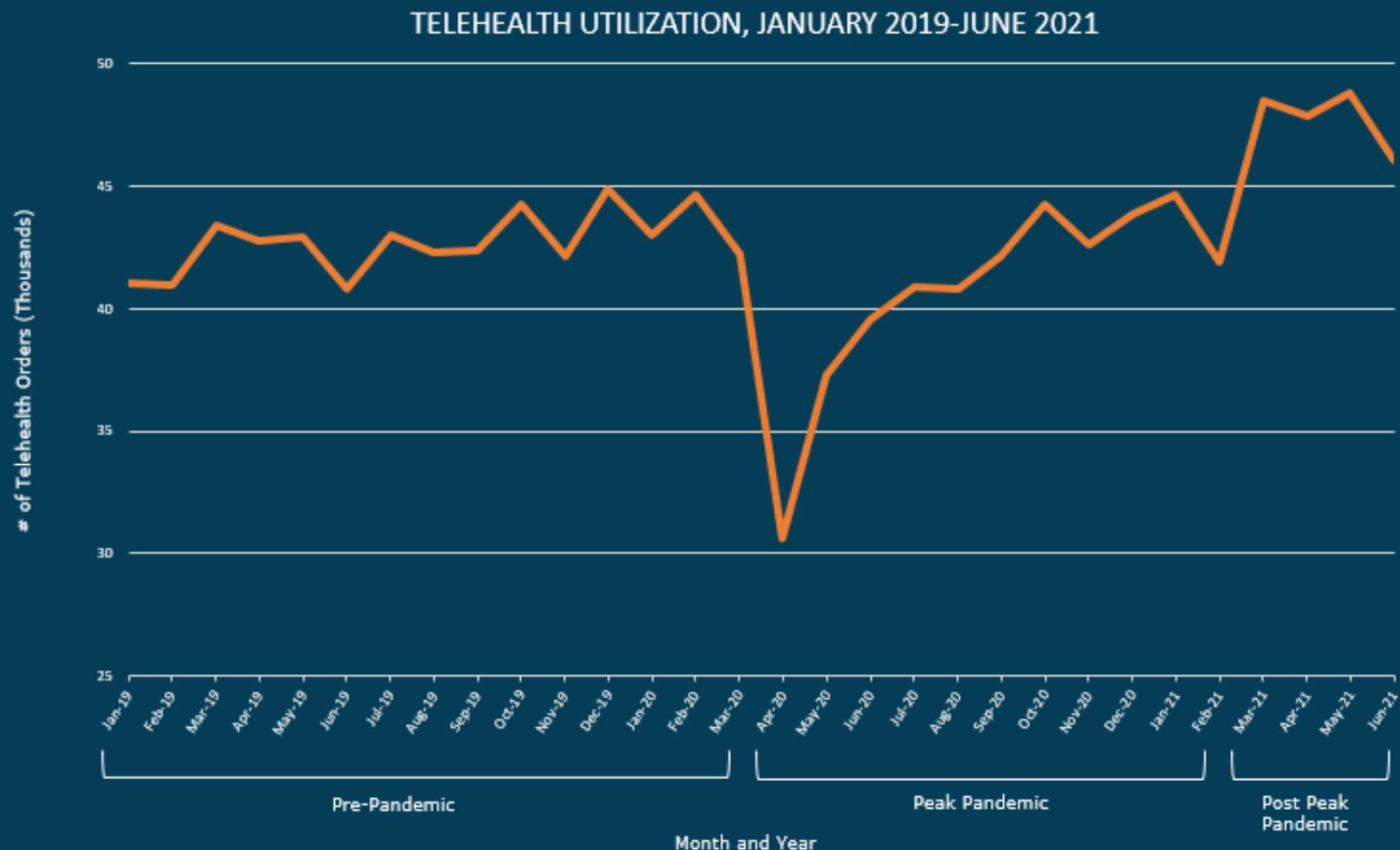
# TELEHEALTH UTILIZATION

# Forms of Telehealth

## More than Zoom calls

- ✓ **SYNCHRONOUS**  
Real-time telephone or live audio-visual interactions
- ✓ **ASYNCHRONOUS**  
"Store and forward" technology (Patient Portals)
- ✓ **REMOTE PATIENT MONITORING**  
Direct transmission of clinical measurements from a distance

# Telehealth Utilization by Pandemic Stage



Total telehealth orders increased by 17% from 1/2020-6/2020 to 1/2021-6/2021.



# BENEFITS OF TELEHEALTH



## Increased Accessibility

Patients in rural settings need less resources to see providers



## Reduce Strain on Facilities

Minimizes surge of patient demand on facilities



## Cost Savings

Reduces hospital costs by providing remote access to specialists

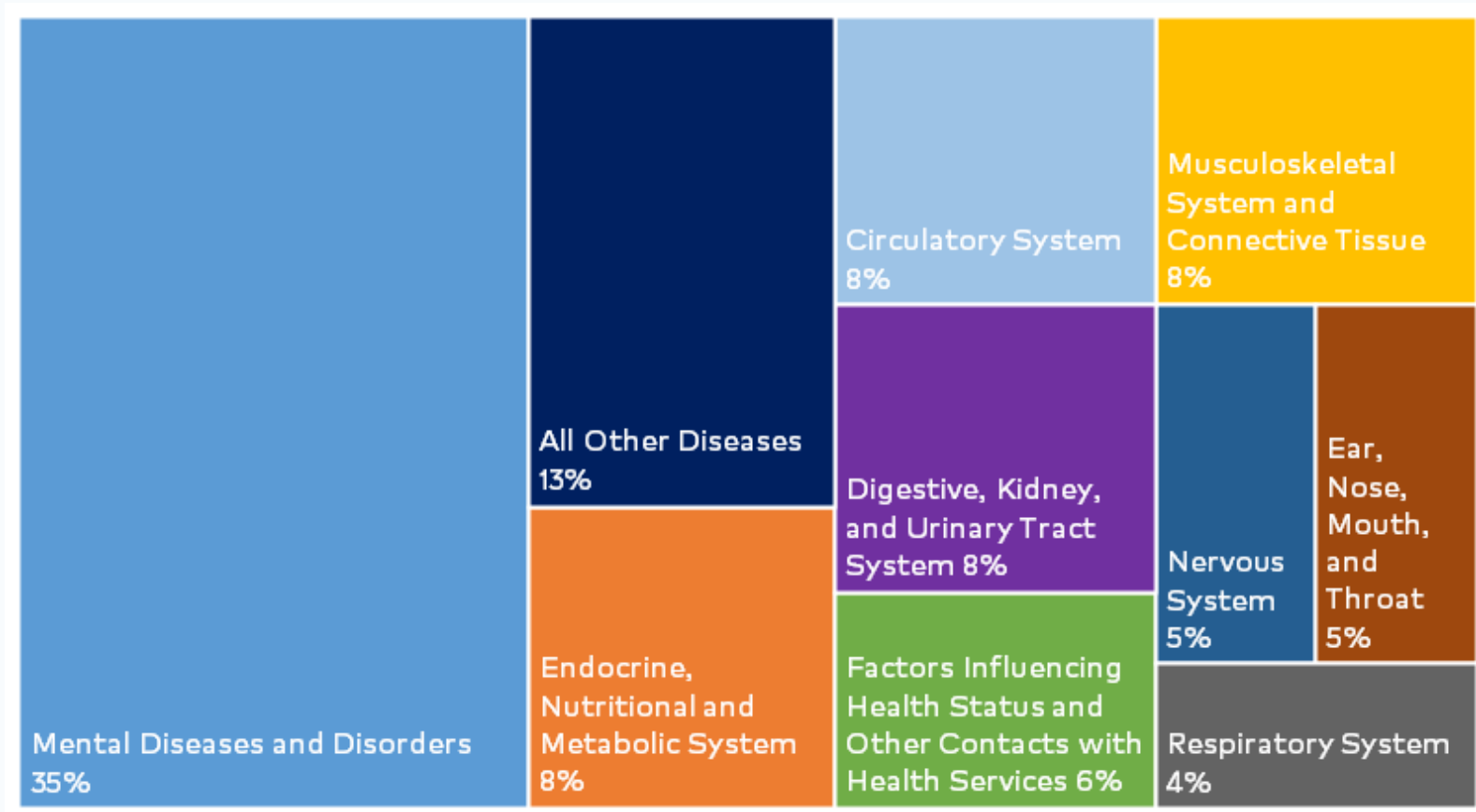


## Comfort

Allows patients to remain in their homes or community as they receive care

# Proportion of Telehealth Visits by Major Diagnostic Category

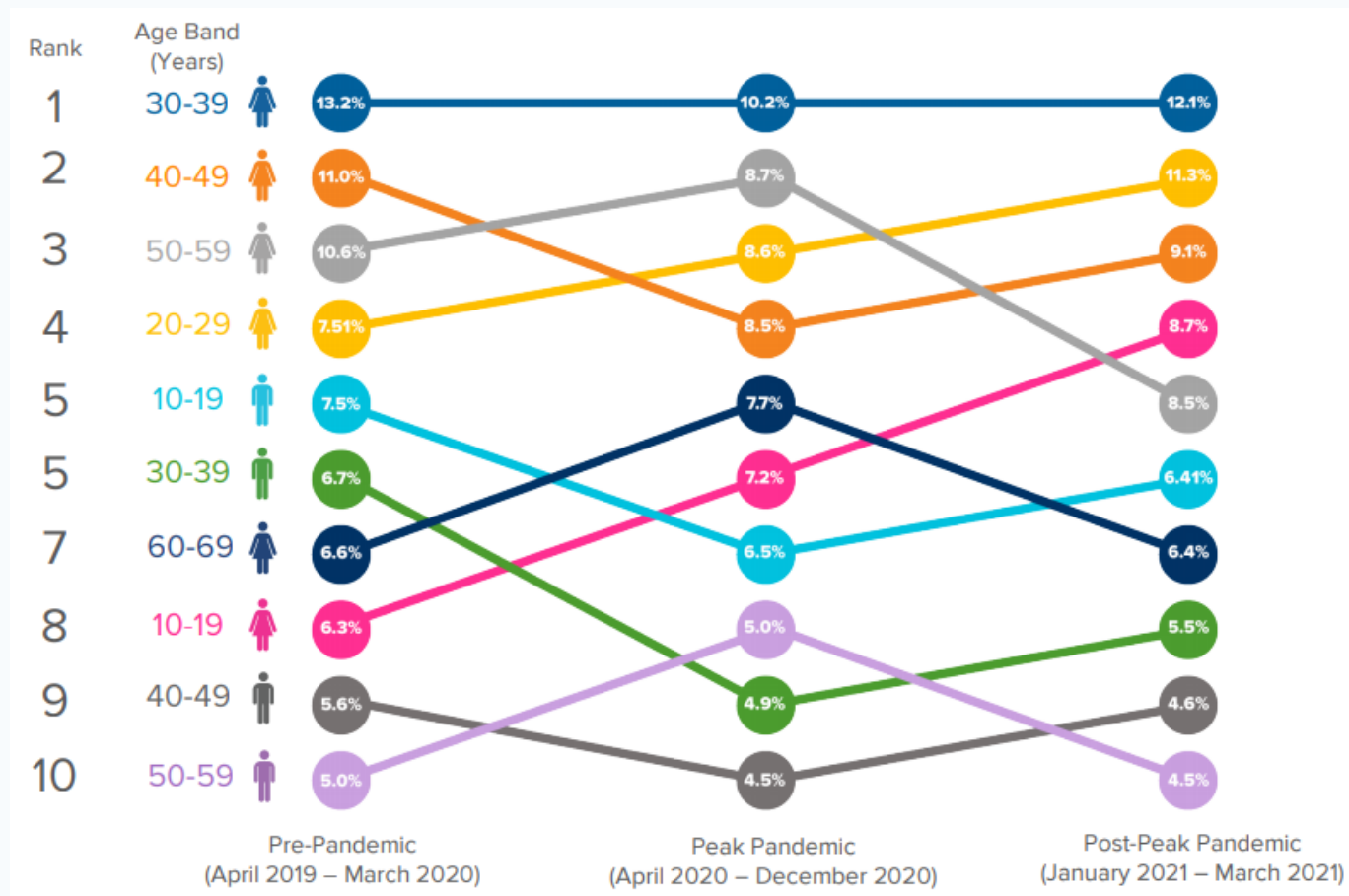
Behavioral Health drove telehealth demand.



# Top Age/Gender Groups Utilizing Telehealth

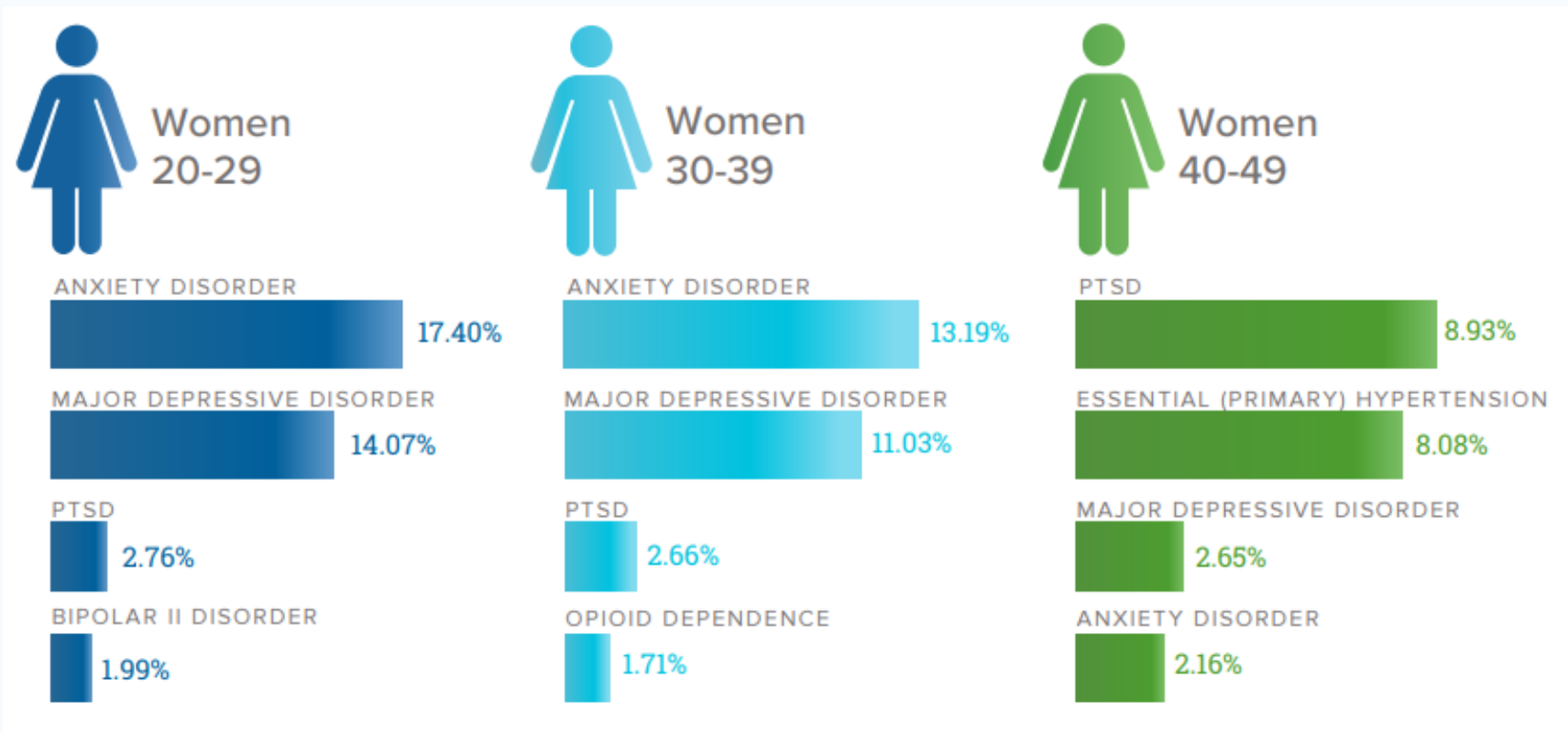
**Women 30-39 use telehealth most consistently.**

**Women 20-29 are the fastest growing user group.**



# Most Frequent Diagnoses Among the Most Frequent Telehealth Users

Anxiety and depression are the most frequent diagnoses among the most frequent telehealth users.



Note: Percentages reflect utilization trends during April 2019 to March 2021.

Source: Trilliant Health Data Insights

The background is a dark blue collage of business-related icons. In the top left, there's a close-up of a calculator with buttons for '1', '2', '3', '+', '00', and '='. In the center, there's a bar chart with several vertical bars of varying heights. In the bottom left, there's a pie chart with several segments. On the right side, there's a spiral-bound notebook with lined pages. A blue pen lies diagonally across the bottom center. The overall aesthetic is professional and analytical.

# **ECONOMICS OF TELEHEALTH**

# Ever Increasing number of Tech-Enabled Care Providers

## TIMELINE OF SELECT SUPPLIERS OFFERING TELE-CAPABILITIES

PRE-2015



2015



2016



2017



2018



2019



2020



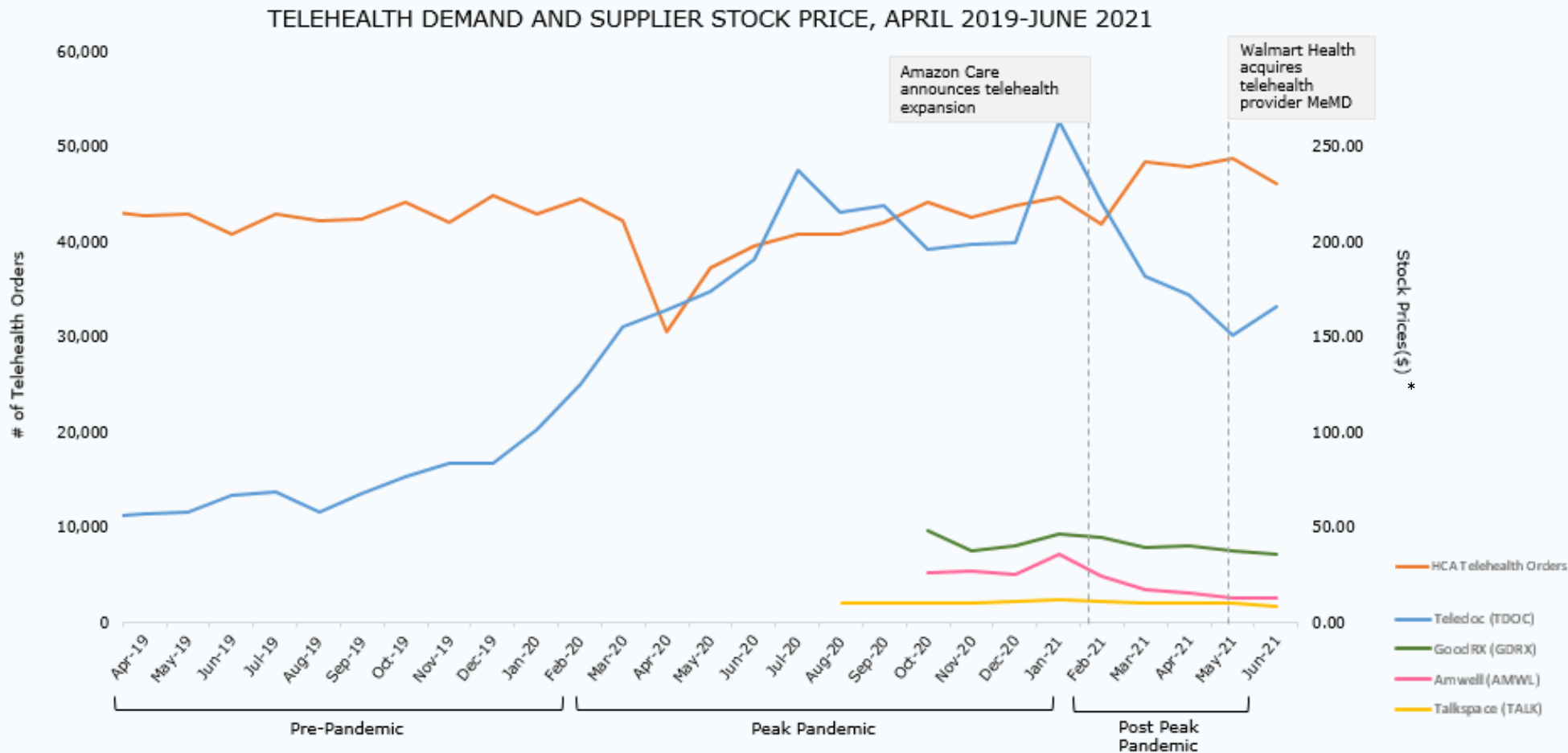
2021





# As competition goes up, established telehealth supplier stocks go down

Major telehealth providers have seen dips in stock values as more suppliers join the market and patients return to in-office visits.



# Steps to Address an Increasingly Competitive Market

Health systems are facing growing competition from consumer businesses.

## FOCUS ON EXPERIENCE AND CONVENIENCE

Geographic markets with low PCP engagement are vulnerable to customer defection.

## TRANSPARENCY

Providers such as Walmart Health and Amazon Care are provide appointment costs prior to encounters, leading to increased customer satisfaction.

## TARGET LOYAL CUSTOMERS

Consumers with more care needs prefer traditional models of care and are less comfortable with digital modalities.



# Questions? Contact Me.

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