



TELEHEALTH TRENDS SHAPING THE POST-PANDEMIC HEALTH ECONOMY

Chelsea McQueen
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Today's Outline

Topic Highlights

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

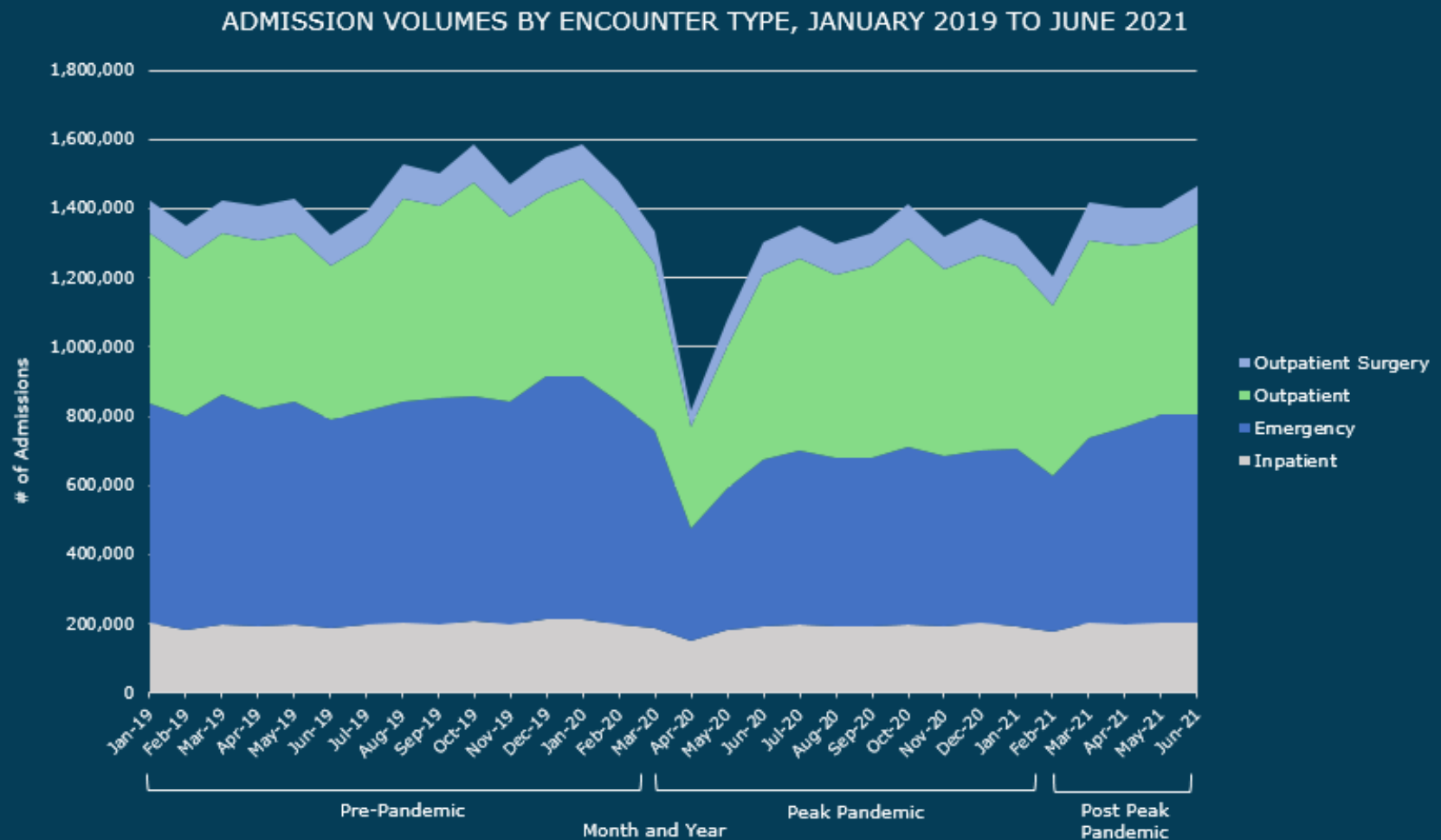


**ABOVE ALL ELSE, WE ARE
COMMITTED TO THE CARE
AND IMPROVEMENT OF
HUMAN LIFE.**

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 on the left, gesturing with their right hand towards a laptop screen. On the screen, an elderly woman with short white hair and glasses is smiling and waving. The scene is set in a bright, modern office or clinic with a window and a potted plant visible in the background. The entire image is overlaid with a semi-transparent blue filter. Two thin white diagonal lines are present: one in the top-left corner and another in the bottom-right corner.

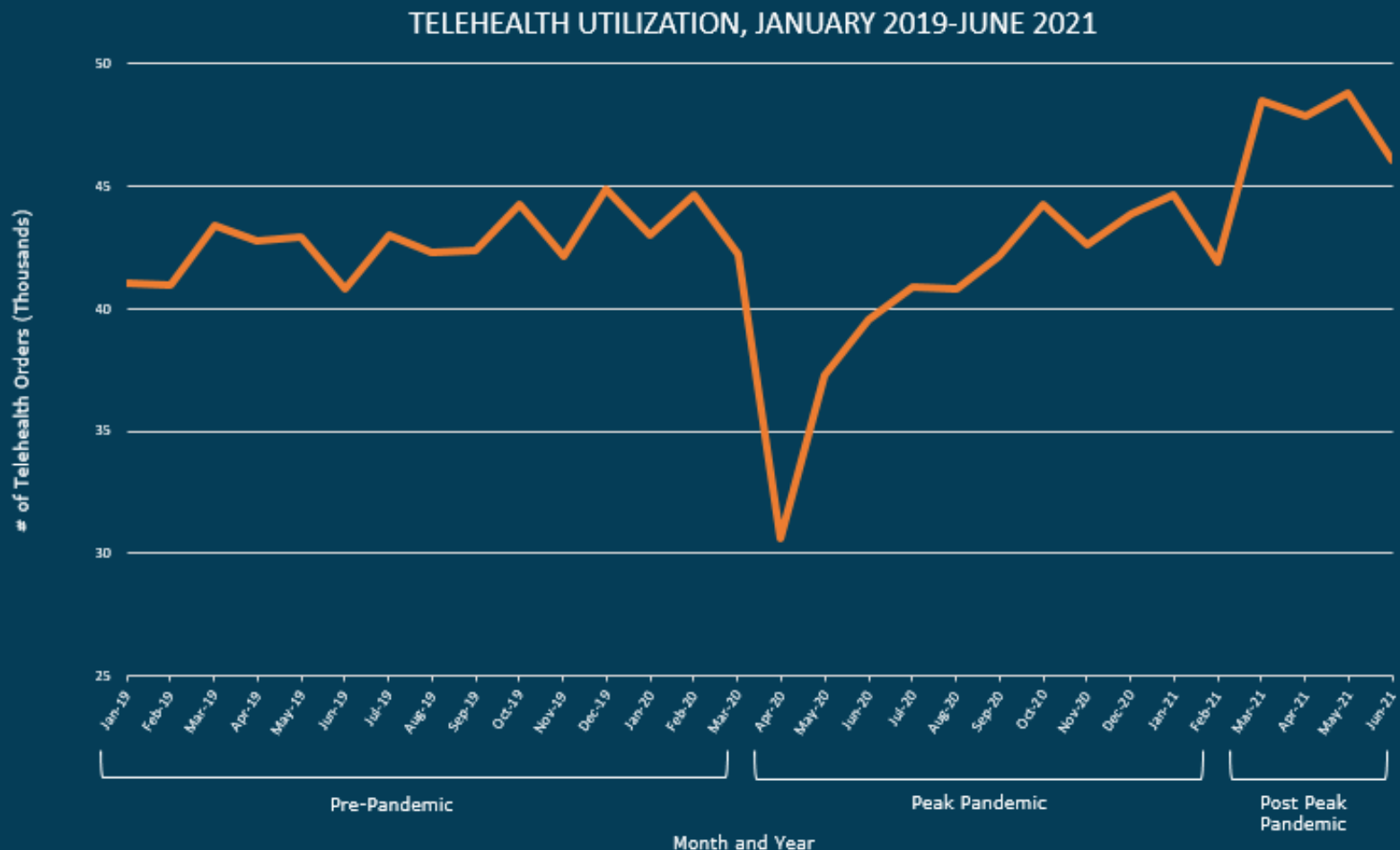
TELEHEALTH UTILIZATION

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

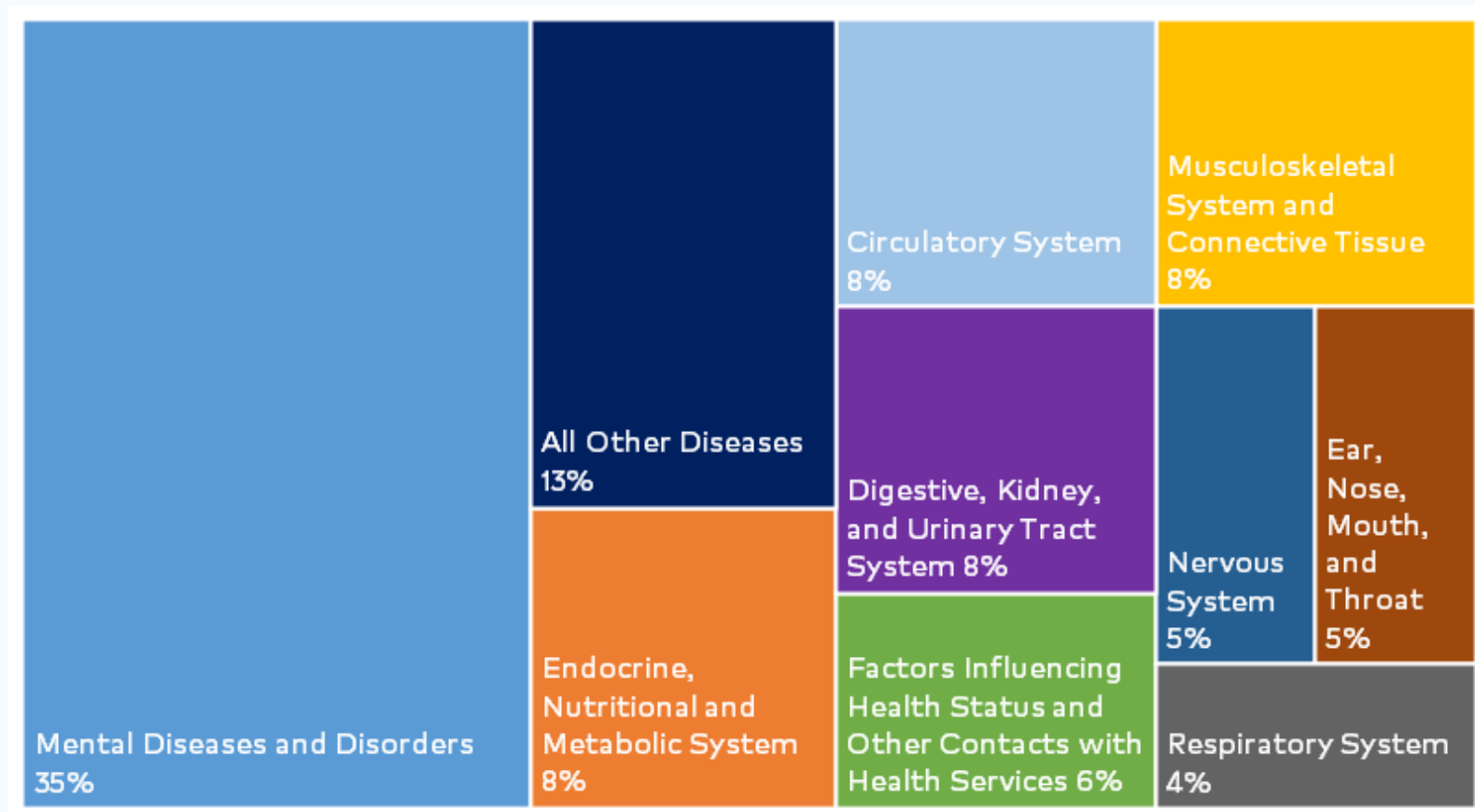


Comfort

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

Proportion of Telehealth Visits by Major Diagnostic Category

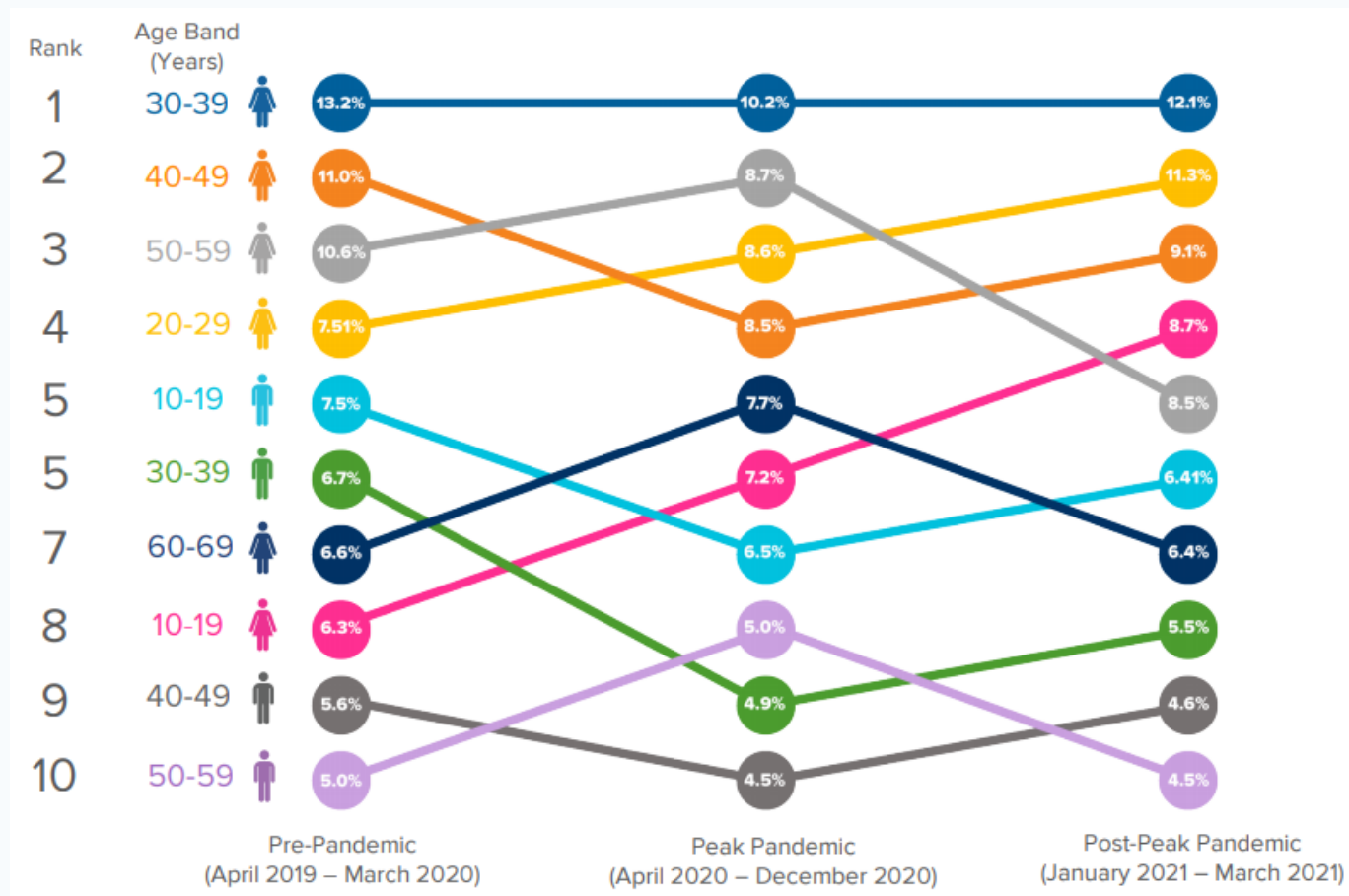
Behavioral Health drove telehealth demand.



Top Age/Gender Groups Utilizing Telehealth

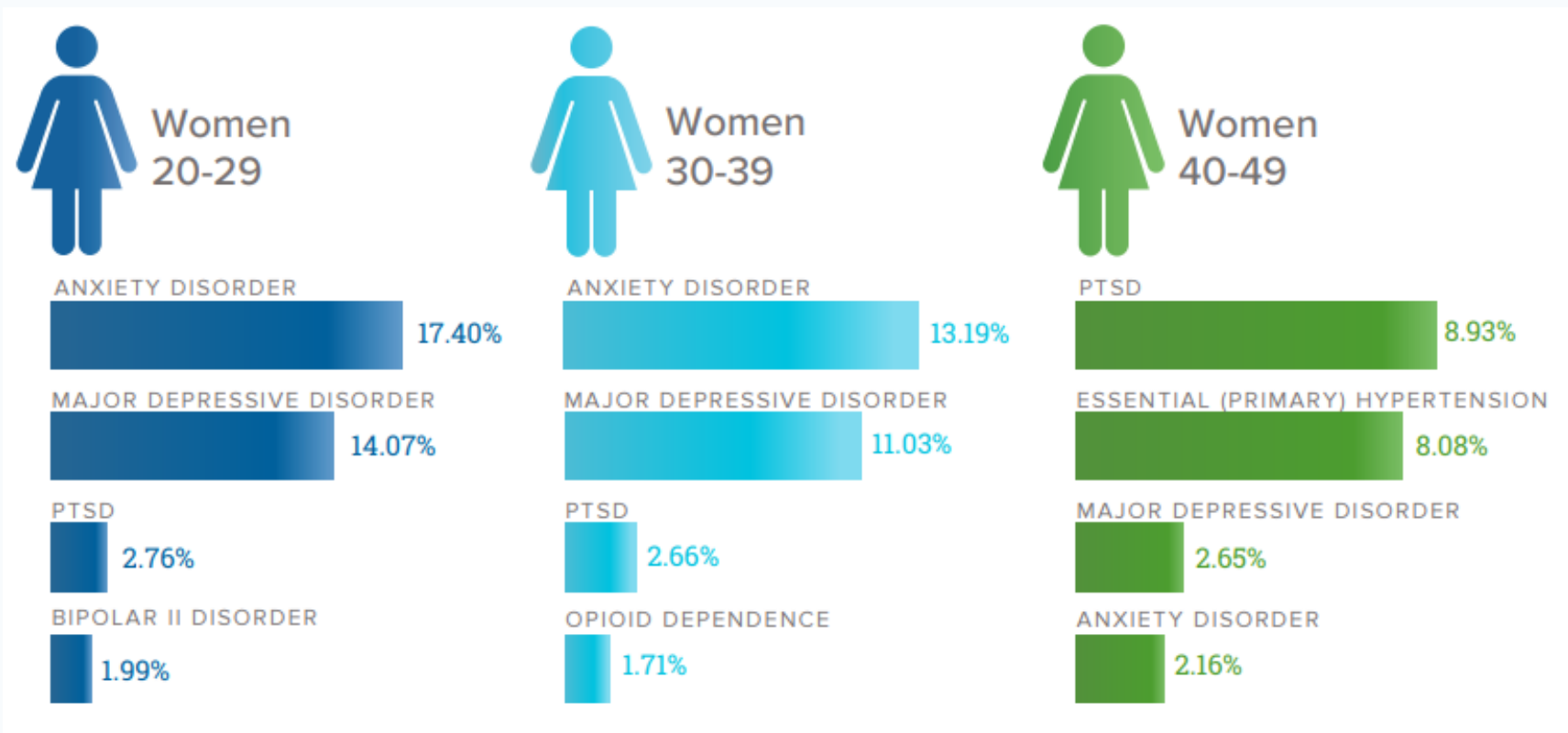
Women 30-39 use telehealth most consistently.

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, a portion of a calculator is visible with buttons for '1', '2', '3', '+', '00', and '='. In the center, there is a bar chart with several vertical bars of varying heights. In the bottom left, a pie chart is partially visible. On the right side, there is a spiral-bound notebook. A pencil 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

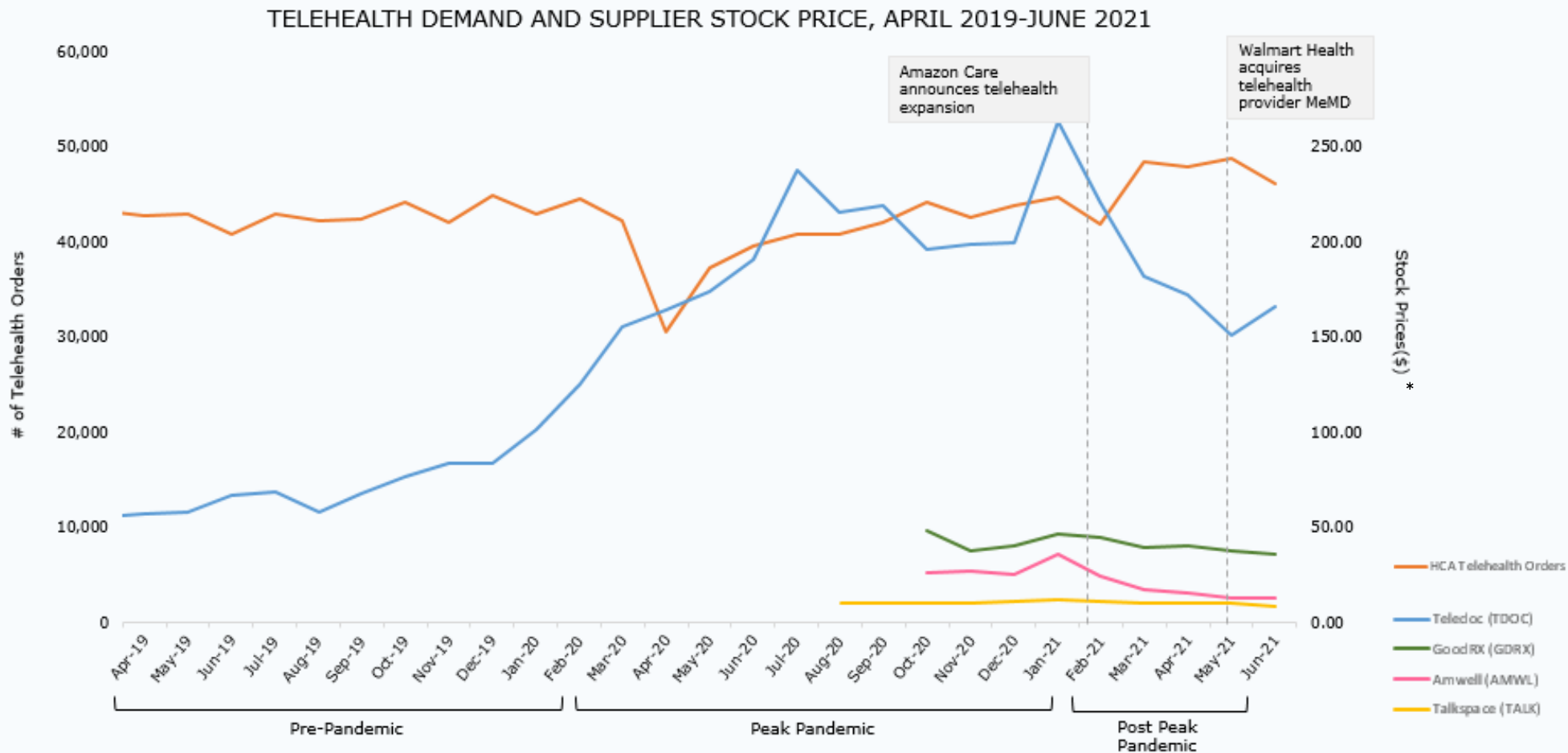


2021



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 provide appointment costs before 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.

EMAIL ADDRESS

chelsea.mcqueen@live.com

LINKEDIN

[linkedin.com/in/chelseamcqueen](https://www.linkedin.com/in/chelseamcqueen)

GITHUB

github.com/chelseamcqueen