The Rise and Impact of Telehealth

NBCUniversal
Telehealth is the use of electronic information and telecommunications technologies to support and promote long-distance clinical health care, patient and professional health-related education, public health and health administration.

Telehealth Claim Volume vs. Pre-Covid Levels
(February 2020 = 1)

Pandemic Peak: 78x
Current Utilization: 38x

Which of the following would you do virtually if given the choice?

- Health and wellness advisories: 62%
- Routine appointments: 52%
- Mental health: 46%
- Diagnoses for illnesses, diseases, and disorders: 42%

Source: Re-Examining the Accenture 2020 Digital Health Consumer Survey - Q: Which of the following would you do virtually if given the choice? “Definitely” and “Probably would do virtually” responses.
TELEHEALTH OFFERS KEY BENEFITS INCLUDING HELPING TO:

- **REDUCE GAPS IN CARE**
  Allows people in medical deserts to get care

- **MANAGE CONDITIONS**
  Improves treatment adherence, a key medical issue

- **GET EARLY DETECTION**
  Makes it easier and quicker to get symptoms checked

- **ESTABLISH RELATIONSHIPS**
  Increases access to doctors for those who can’t go on a regular basis
Lower income, older, and individuals from less populated areas are using telehealth services the least.

There are specific challenges preventing adoption:

**Digital Divide**
Older Americans and those in less populated areas have less broadband access and lower familiarity with digital technology. 1 27% of Households headed by someone 65+ do not have an internet subscription. 2

**Privacy Concerns**
People are concerned about how their data is used and secured. 35% of Americans are not confident that their health data is appropriately protected. 3

**Lack of Understanding**
These groups don’t have a great understanding of Telehealth capabilities and benefits. McKinsey cites a lack of awareness and education of which care needs could be met virtually as a top factor preventing use. 4

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<thead>
<tr>
<th>Issue</th>
<th>Recommendation</th>
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<tbody>
<tr>
<td>Normalize the use of Telehealth in creative</td>
<td>The majority of Pharma creative has not evolved to incorporate Telehealth as a normal part of the patient journey.</td>
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<td>Address the holistic benefits of Telehealth and the barriers to adoption, demonstrating “how to use” and how privacy is protected.</td>
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<td>Create targeted education campaigns</td>
<td>Telehealth is underused by lower income, older, and individuals potentially in medical care deserts.</td>
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<td>Educate underserved audiences via targeted media and recognizable talent (e.g., local personalities, older Americans, etc.)</td>
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For questions or continued conversation on Telehealth

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### TELEHEALTH TOP DISEASE STATES

Behavioral health was a key driver of telehealth during the peak of the pandemic.

<table>
<thead>
<tr>
<th>Disease Category</th>
<th>Proportion</th>
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<tr>
<td>Mental Diseases</td>
<td>35%</td>
</tr>
<tr>
<td>All Other Diseases</td>
<td>13%</td>
</tr>
<tr>
<td>Respiratory</td>
<td>4%</td>
</tr>
<tr>
<td>Ear, Nose, Throat</td>
<td>5%</td>
</tr>
<tr>
<td>Nervous System</td>
<td>5%</td>
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<tr>
<td>Health Services contact</td>
<td>6%</td>
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<tr>
<td>Digestive and Kidney</td>
<td>8%</td>
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<tr>
<td>Musculoskeletal</td>
<td>8%</td>
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<tr>
<td>Circulatory</td>
<td>8%</td>
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<tr>
<td>Endocrine, Nutritional, and Metabolic</td>
<td>8%</td>
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<td><strong>Source:</strong> 2021 Trilliant Health national all-payer claims database. <em>Other Diseases</em> refers to all other Major Diagnostic Categories (MDCs) with proportion of Telehealth visits for any given MDC &lt;3%.</td>
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