

TELEHEALTH GROWTH DURING COVID-19

Telehealth has exploded during the COVID-19 crisis, building upon the incremental growth that has been occurring in recent years. Digital technologies have become more accepted by both consumers and providers and telehealth appears to be fulfilling its promise as a significant part of the health care system.

Many policy changes have been made during the COVID-19 crisis to significantly expand the use of virtual care. If these changes go away, telehealth may be rolled back rather than becoming a sustained and transformational approach to patient care.



4,347% GROWTH

In telehealth claims to private insurers year-over-year.

<https://www.fairhealth.org/states-by-the-numbers/telehealth>

ONE-THIRD

FAIR Health found that one-third (33.91%) of telehealth claims to private insurers during the COVID pandemic were for mental health conditions.

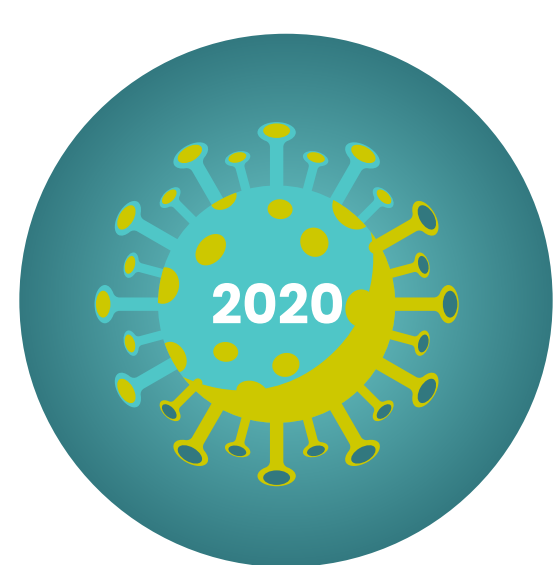
<https://www.fairhealth.org/states-by-the-numbers/telehealth>



64.3% GROWTH IN DEMAND IN 2020

Research from Civic Science indicates that this growth in demand came across all ages and demographics, including some hard-to-reach demographics like seniors and rural consumers.

<https://www2.frost.com/news/press-releases/telehealth-to-experience-massive-growth-with-covid-19-pandemic-says-frost-sullivan>



HEALTH PLAN EXAMPLES OF TELEHEALTH GROWTH

600%

CVS Health saw 600% growth in telehealth and virtual visits through their MinuteClinics in the first quarter of 2020 compared to the first quarter of 2019.

<https://www.fiercehealthcare.com/payer/cvs-health-beats-wall-street-estimates-2b-profit-affirms-2020-earnings-guidance>

50x

Blue Cross and Blue Shield of Tennessee has seen 50 times more telehealth visits in May 2020 compared to their normal amount of telehealth visits.

<https://healthpayerintelligence.com/features/beyond-covid-19-telehealth-partnership-member-engagement>

90,500

Blue Cross of Idaho processed more than 90,500 telehealth claims between March and June of 2020, with telehealth now representing more than one-quarter of all claims.

<https://www.kivitv.com/news/blue-cross-of-idaho-sees-nearly-11-000-increase-in-telehealth-claims>

Telehealth visits for UPMC jumped from about **250 ENCOUNTERS PER DAY TO 9,500 PER DAY** by the end of April, a **jump of 3,700%.**

<https://www.upmc.com/media/news/052020-upmc-bridge>

THE TELEHEALTH MARKET COULD POTENTIALLY REACH \$250 BILLION ACCORDING TO RESEARCH FROM MCKINSEY & COMPANY.

<https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/telehealth-a-quarter-trillion-dollar-post-covid-19-reality#>

A NEW REPORT FROM FROST & SULLIVAN PROJECTS 7-FOLD GROWTH OF TELEHEALTH BY 2025.

Deployment of more mature analytics, better adherence to cybersecurity and privacy regulations, and use of data to show return-on-investment will contribute to significant telehealth expansion.

<https://www2.frost.com/news/press-releases/telehealth-to-experience-massive-growth-with-covid-19-pandemic-says-frost-sullivan/>

KEYS TO SUSTAINED GROWTH

Telehealth has grown dramatically across all geographies, ages, and lines of business during the COVID crisis. Policy changes have been enacted during the crisis to encourage increased use of telehealth -- but many will expire with the conclusion of federal and state declarations of public health emergencies.

To ensure continued growth of telehealth, policymakers must:



ALLOW FOR FLEXIBILITY IN BENEFIT DESIGN.

Insurance providers need to be able to design offerings and benefits to meet the needs of their members. Consumers will benefit from insurance provider flexibility in reimbursements, available services, and use of utilization management tools and the ability to implement models that encourage high-quality, safe, affordable care.



ELIMINATE BARRIERS TO ACCESS.

Restrictions around geography, originating sites, existing patient-provider relationships, and state licensure prevent telehealth from growing organically.

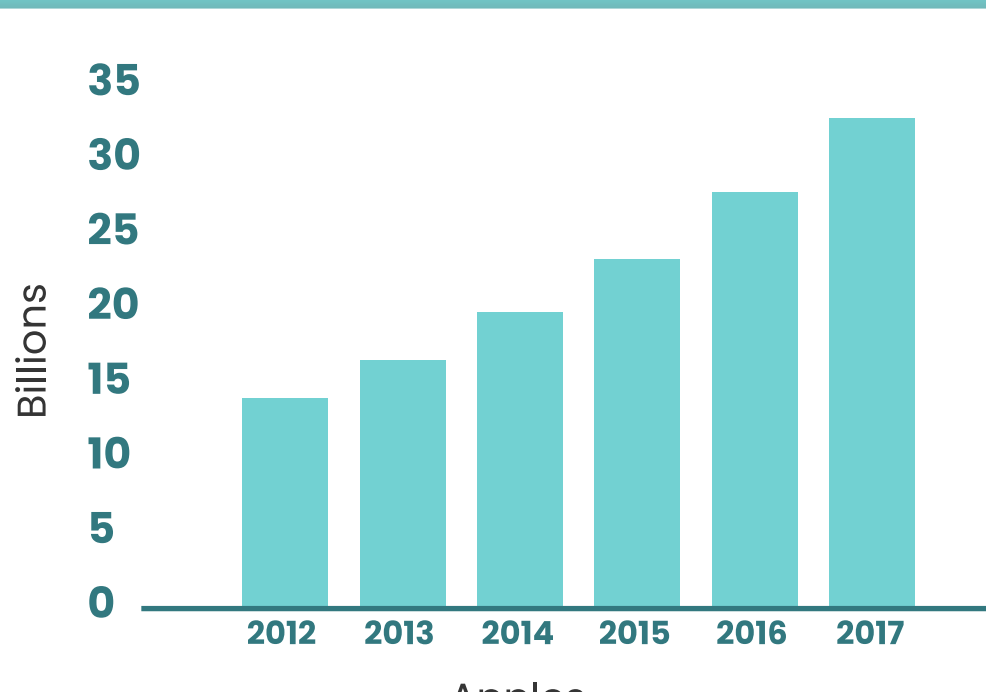


APPROVE TELEHEALTH AS LEGITIMATE CARE.

As learned during the COVID crisis, telehealth can be clinically comparable to in-person care for many conditions and consumers. Policymakers must recognize this and allow for telehealth visits to be counted towards network adequacy requirements, risk adjustment calculations, and quality measurement.

TELEMEDICINE

Global telemedicine market poised to grow at 18% CAGR



QUALITY & OUTCOMES



91%

Of health outcomes were as good or better via telehealth. (1)



50%

Of healthcare leaders say improving the quality of care as their No.1 reason of implementing telemedicine. (2)



64%

Of Americans would be willing to have a video visit with a doctor.

TECHNOLOGY & GEOGRAPHY



39%

Of US physicians communicate online with patients via email, secure messaging, instant messaging, or online video conferencing. (4)



64%

Proportion of telemedicine programs that offer remote monitoring. (2)



30%

The percent of the US population that does not live near a trauma center. (5)

1) <https://www.americanwell.com/top-10-stats-you-need-to-know-about-telehealth/>

2) <https://www.beckershospitalreview.com/healthcare-information-technology/10-statistics-on-the-current-use-of-telemedicine-use-of-telemedicine-in-hospitals-health-systems.html>

3) <https://www.americanwell.com/top-10-stats-you-need-to-know-about-telehealth/>

4) <https://www.healthcarenews.com/blog/45-mind-blowing-digital-health-statistics-and-trends>

5) <https://www.gerreferraldm.com/2013/11/health-care-technology-innovations-2013-infographic/>