

SEPT 2021



# The Rise and Impact of Telehealth

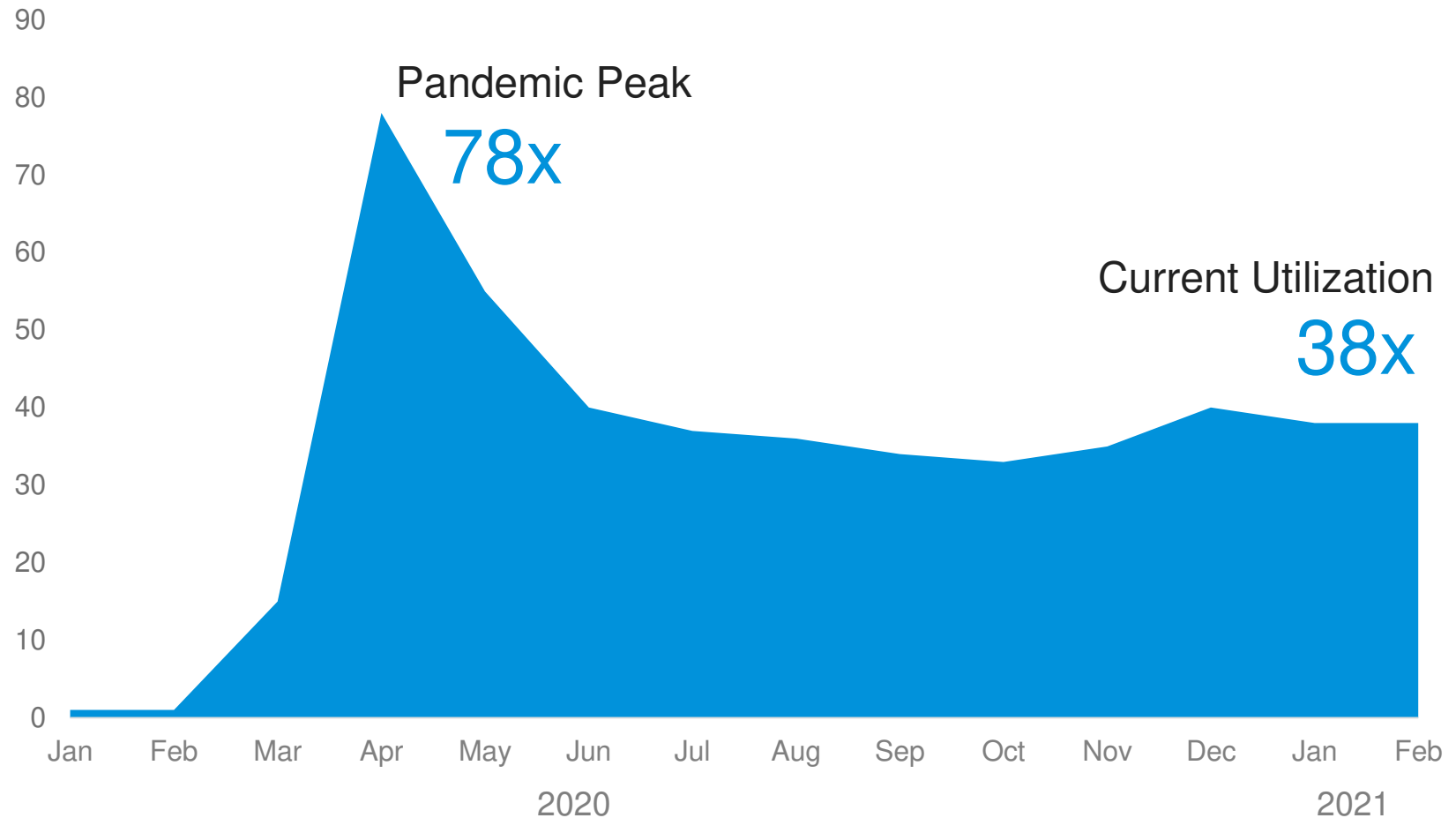
NBCUniversal

# TELEHEALTH BOOMED DURING THE PANDEMIC AND HAS NOW STABILIZED

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

Chart Source: McKinsey, Telehealth: A quarter trillion- dollar post-COVID-19 reality, July 2021. Compile database; McKinsey Analysis. Includes all medical areas except emergency department, hospital inpatient, and psychiatry inpatient claims; Telehealth Definition Source - Health Resources Services Administration

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



# PEOPLE CONTINUE TO BE INTERESTED IN TELEHEALTH AS PART OF THEIR HEALTHCARE

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

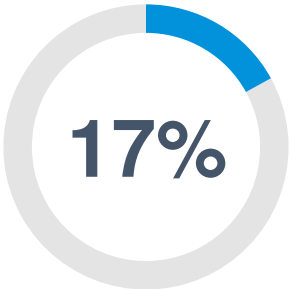
Increases access to doctors for those who can't go on a regular basis

BUT THE PEOPLE WHO NEED CARE THE MOST, ARE GETTING CARE THE LEAST

Lower income, older, and individuals from less populated areas are using telehealth services the least

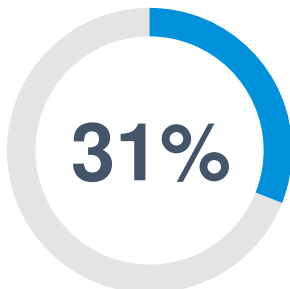
Source: 1. Accenture - How can leaders make recent digital health gains last. Q = Have you received any kind of healthcare virtually?; 2. Trilliant Health 2021 trends shaping the post-pandemic health economy. Data via Trilliant Health national all-payer claims database.

LOWER INCOME<sup>1</sup>



People making under \$50K or \$50K-\$100K using Telehealth

HIGHER INCOME



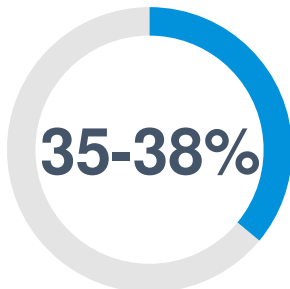
People earning over \$100K using Telehealth

OLDER<sup>1</sup>



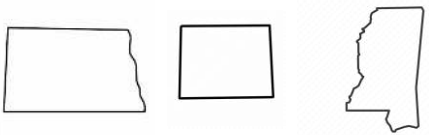
Silent Generation and Baby Boomers using Telehealth

YOUNGER



Millennials and Gen Z using Telehealth

LOW DENSITY



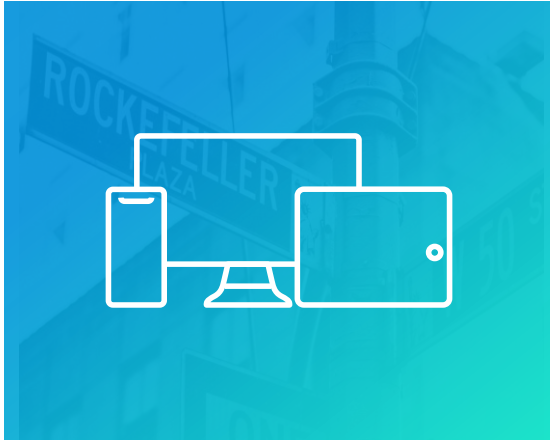
States with least Telehealth Growth

HIGH DENSITY



States with most Telehealth Growth

## THERE ARE SPECIFIC CHALLENGES PREVENTING ADOPTION



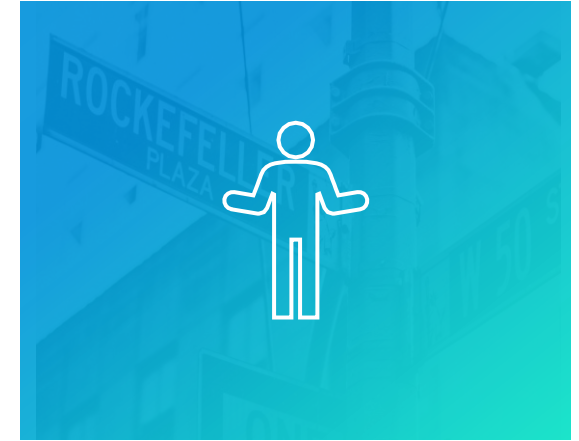
### Digital Divide

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



### 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.<sup>3</sup>



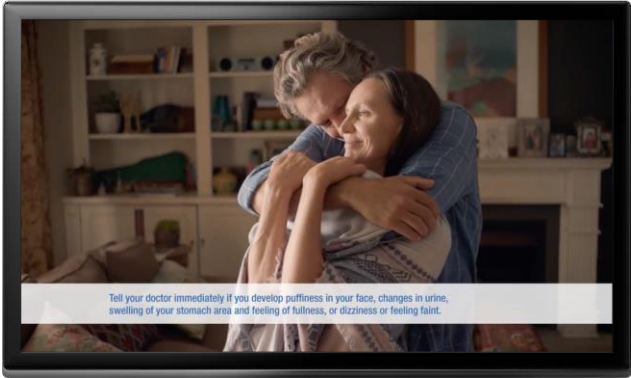
### Lack of Understanding

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.<sup>4</sup>

# COMMUNICATIONS CAN HELP OVERCOME THESE CHALLENGES

NBCU recommendations to  
address these issues

Issue

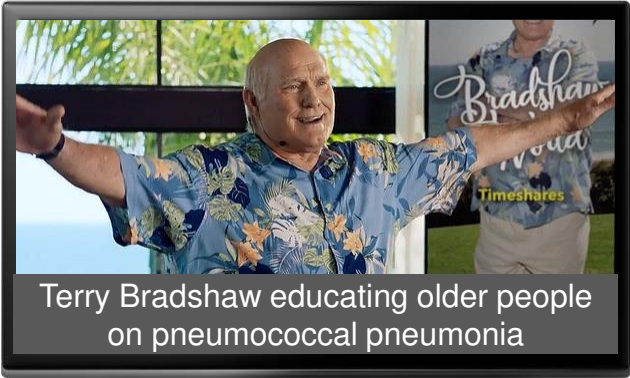


## Normalize the use of Telehealth in creative

The majority of Pharma creative has not evolved to incorporate Telehealth as a normal part of the patient journey.

Recommendation

Address the holistic benefits of Telehealth and the barriers to adoption, demonstrating “how to use” and how privacy is protected.



## Create targeted education campaigns

Telehealth is underused by lower income, older, and individuals potentially in medical care deserts.

Educate underserved audiences via targeted media and recognizable talent (e.g., local personalities, older Americans, etc.).



# CLIENT STRATEGY PHARMA CONTACTS

For questions or continued  
conversation on Telehealth



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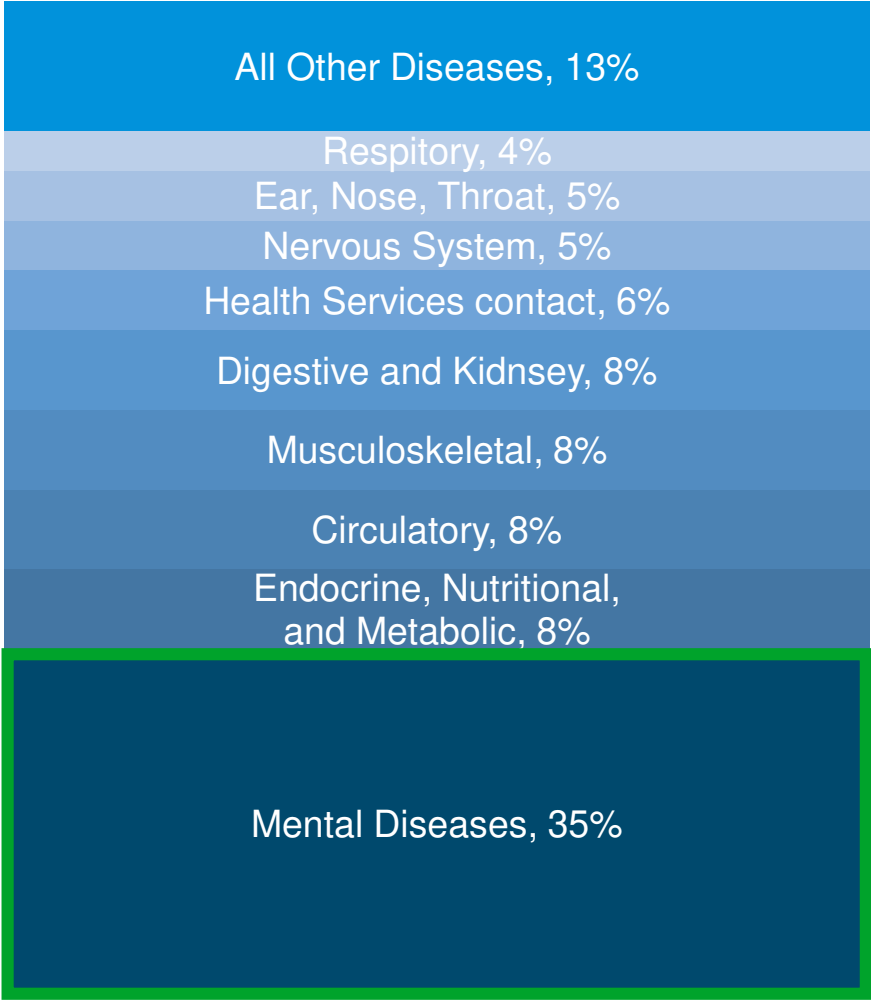
# APPENDIX

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# TELEHEALTH TOP DISEASE STATES

## BEHAVIORAL HEALTH WAS A KEY DRIVER OF TELEHEALTH DURING THE PEAK OF THE PANDEMIC

### PROPORTION OF TELEHEALTH VISITS BY MAJOR DIAGNOSTIC CATEGORY



Source: 2021 Trilliant Health national all-payer claims database. "Other Diseases" refers to all other Major Diagnostic Categories (MDCs) with proportion of Telehealth visits for any given MDC <3%.