



Perspectives 2021: The Path Forward for Virtual Care

Introduction

Virtual care adoption dramatically accelerated when the global pandemic suddenly limited healthcare access and taxed healthcare systems around the world. Healthcare consumers and care providers quickly turned to telehealth as a valuable alternative to in-person care, with 46% of people using telehealth services compared to 11% in 2019.

With this accelerated adoption—and the growing recognition that the scope of virtual care goes well beyond a typical urgent care visit—the promise and potential of whole-person virtual care can finally be realized.

Our vision is to position virtual care as the first place consumers go to get the care they need and manage their health. For whatever healthcare needs a consumer has, across any site of care, we will provide the right level of personalized support to meet that need.

We will achieve this by delivering, enabling and empowering integrated whole-person virtual care services and experiences that span every stage of the health journey—from wellness and prevention and acute care to chronic conditions and complex healthcare needs.

This whole-person path forward is shaped by our perspectives on how virtual care will continue to evolve. Teladoc Health is already down this path, uniquely positioned to enable the future of virtual care. We will continue to transform the healthcare experience and ultimately empower all people everywhere to live their healthiest lives.

Specifically, as we look ahead, we believe whole-person virtual care:

- Becomes essential to both episodic and longitudinal healthcare
- Delivers evidence-based care and quality at scale
- Creates a new era of clinical collaboration
- Leverages technology to enhance the consumer experience
- Extends healthcare to underserved populations around the world

Turn the page to learn more about these perspectives and the path forward from our experts.

Perspectives

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01

Perspective



I define whole-person virtual care as end-to-end care across a spectrum of needs for both myself and my family. It's convenient, personalized and, most importantly for me, it's trusted. It spans every state of our healthcare journey, from wellness and prevention to complex health needs, enabling longitudinal care.

Kelly Bliss

President, U.S. Group Health

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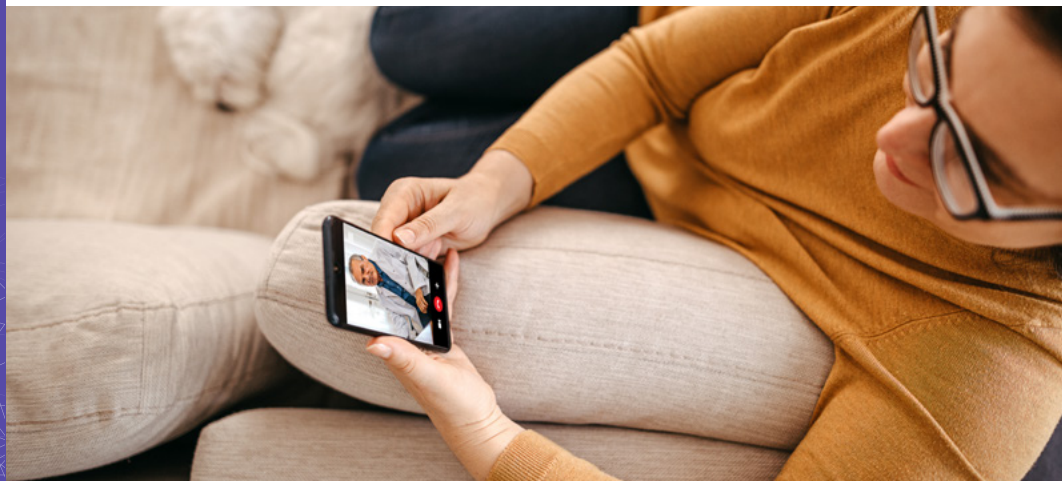
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Whole-person virtual care becomes essential to both episodic and longitudinal healthcare

The episodic and longitudinal delivery of whole-person virtual care has become more and more essential to addressing supply and demand dynamics in today's global healthcare market. First, the demand for high-quality, accessible and affordable healthcare has never been more pronounced. The global population is aging, and the prevalence of chronic conditions and mental health needs is on the rise.

- Sixty percent of adults have a chronic disease, with 40% managing two or more.
- Chronic conditions compound the stress on patients to attend frequent appointments, undergo regular diagnostics and maintain complex medication regimens.
- Half of adults (53%) say worry or stress related to the pandemic had a negative impact on their mental health, including 1 in 4 who say it had a major impact.

All of these factors increase the strain on healthcare systems in every country every day, signaling a need for a hybrid model of care that seamlessly blends in-person care with telehealth. In fact, estimates show that \$250 billion of current U.S. healthcare spend could potentially be virtualized.



Virtual care addresses rising healthcare demand and supply-side shortfalls

Converging trends also show that the current supply of care providers no longer meets the emerging needs of our global population. According to new [data from the Association of American Medical Colleges](#), the United States could see an estimated shortfall of up to 139,000 primary and specialty care physicians by 2033. Globally, the [World Medical Association](#) notes that today there are 76 countries with fewer than one physician per thousand people and 3 billion people without access to a health professional.

Health systems and plan sponsors recognize the power of virtual care in solving network adequacy concerns. In fact, [80% of plan sponsors believe virtual care will have a significant impact](#) on how care is delivered in the future. They are investing in and offering virtual care to their members—who in turn find high value in the services.

Whole-person virtual care enables consumers to interact with a range of doctors, nurses, therapists, coaches and other care providers, allowing clinical providers and care team members to operate at the top of their license.





To truly influence consumer behavior, we need to create a system that understands the whole person. This system learns from your healthcare experience and your needs across the care journey. It's intuitive, it knows what is going to work for you. It's able to predict what you need next and can personalize your experience. Over time, it helps us build trust with consumers—and trust is a key enabler of our longitudinal care experience.

Anmol Madan

Chief Data Scientist

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The path forward

Today, whole-person virtual care helps to ease the strain on healthcare systems. It extends the reach of care providers to serve more people and enables clinicians to collaborate on care regardless of location. Virtual care augments care delivery—both episodically and longitudinally—and closes the gap of existing and emerging network shortfalls. Virtual care is uniquely suited to deliver outstanding healthcare services during global emergencies when demand for healthcare spikes quickly.

Personalization drives longitudinal healthcare relationships

In addition to the inroads telehealth services have made to address supply and demand issues, whole-person virtual care enables a level of personalized care that can be difficult to achieve during an in-person visit. From an episodic healthcare visit to the creation of patient-centered longitudinal care plans, virtual care builds a complete understanding of each person, using whole-person data, advanced insights and predictive analytics to personalize the healthcare experience. By bringing together both novel and traditional data, care providers can reference a whole-person view of each individual that evolves as their health journey changes in real time.



Health signals inform whole-person care

Traditional healthcare data (lab test results, medication history and medical claims information) give care providers a broad view of the person's health history. However, the harmonization of novel classes of data—we call them health signals—like nutritional information and user-provided data from smart watches, blood glucose monitors and other devices, surfaces even deeper insights into a person's daily health behaviors and status. Combined, these details help build far more sophisticated personalization algorithms to guide long-term care plans while building trust.

With this depth of information available, a personalized experience evolves for each person. Health signals are leveraged to produce prompts or “nudges” that are sent to the individual to help guide healthcare decisions. For example: If an individual is living with a chronic condition and also has a history of depression or anxiety, the clinician can quickly determine if antidepressants are prescribed. This may result in recommending the individual also consider a form of mental health support. This level of personalization plays a valuable role in connecting people to the interventions that are most useful and most relevant to them at the right time. Personalized virtual care addresses today's supply and demand dynamics and also powers a longitudinal relationship with the whole person, driving better health outcomes every step of the way.



02

Perspective



Clinicians are delivering virtual care more than ever before, and there's a bit of a learning curve to it. We created the Institute of Patient Safety and Quality in Virtual Care to support quality improvement and help clinicians learn how to do this well.

Dr. Jason Tibbels

Chief Quality Officer

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Whole-person virtual care delivers evidence-based care and quality at scale

The National Academy of Medicine defines the six dimensions of quality as patient-centered, timely, efficient, equitable, safe and effective. But quality care can be difficult to achieve in resource-constrained areas of the world where such issues as limited access to medical equipment, lack of infrastructure and limited training in specialty care exist.

With whole-person virtual care, the opportunity exists to elevate quality and enable clinicians to practice and deliver care at the top of their licenses. Virtual care has been intentionally designed to not only address these opportunities but to also address them at scale—helping care providers deliver evidence-based care to more people around the world than is possible through an in-person care model alone.

The path forward

When care providers deliver care virtually, each interaction fuels an active learning environment that can lead to direct improvements in how quality care is delivered. Virtual care platforms make data and insights available in real time to generate a feedback loop that informs and nudges care provider and consumer behavior, driving quality outcomes for all.



Active learning environments empower quality care

An active learning environment empowers care providers to deliver the best possible care by aggregating all forms of patient data and surfacing actionable insights to drive evidence-based care delivery. Information streaming in from connected devices like glucose and blood pressure monitors provides data that clinicians can use to adjust medications and tailor interventions. Care providers can create and modify a treatment path, track outcomes over time and reduce cycle times required to determine if an intervention really works as intended. By understanding the trends and patterns, physicians can make better decisions and informed, real-time adjustments to optimize care plans.

The Teladoc Health Medical Group consists of more than 7,000 licensed care providers working across more than 100 virtual care clinical protocols to deliver evidence-based care at scale.

Stepped care advances quality care

This infusion of data, translated into actionable insights, also enables stepped care—an important practice care providers can leverage to drive better outcomes. Stepped care includes the use of digital therapeutics in addition to access to nurses, therapists, primary care providers and specialists. From smart connected devices and AI-driven “nudges” to health coaches and therapists to board-certified physicians and the world’s leading specialists, stepped care helps connect people to the right care at the right time. It allows the provider to consult with an individual at the moment he or she is seeking care to provide the right tools and the right intervention to maximize the impact of that interaction. Stepped care can be used to reduce symptoms or change behaviors, improve a person’s overall health and reduce potential long-term health issues.

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In order to have our clinicians practice at the top of their license, we need to remove the data deluge and all the clutter, and really provide them with the insights they need to provide the highest-quality care for the individual in front of them.

Dr. Bimal Shah

Chief Medical Officer, Product & Analytics

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Whole-person virtual care enables human connection

While data and technology are both important, virtual care and quality must also consider human factors as well as patient conditions and circumstances. Most individuals feel healthcare is a personal, private concern that requires human interaction—direct dialogue with a care provider to achieve the desired outcome. Virtual care helps facilitate this intersection by creating greater opportunities for clinicians to listen and support their patients through one-on-one conversation, then rely on insights and experience (and data) to make a meaningful connection with each person.

This human interaction, combined with real-time access to health data and insights in the context of an active learning environment, enables clinicians to practice medicine at the top of their license and reclaim the joy of practicing medicine while delivering quality care at scale.



03

Perspective



Recent adoption of virtual care technology has ushered in a whole new era of clinical collaboration. Clinicians who never considered virtual technology before are using these capabilities to communicate effectively with their colleagues and patients today.

Dr. Lewis Levy
Chief Medical Officer

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Whole-person virtual care creates a new era of clinical collaboration

Not only did more people turn to virtual care visits in 2020 than ever before, but more clinicians, primary care providers, specialists and mental health experts adopted virtual care in order to stay connected with their patients during the global pandemic. In addition, new payment and reimbursement models combined with increased interoperability helped to usher in a new era of collaboration between payers and providers.

A May 2020 McKinsey & Company study reports that 64% of physicians surveyed said they were more comfortable using virtual care following the pandemic than they were prior to it. In addition, care providers rapidly scaled offerings and reported seeing 50 to 175 times the number of people using telehealth visits than they did before the pandemic began.

This increased virtual care adoption by both care providers and consumers alike is now furthering the role that whole-person virtual care can play in rebuilding a highly fragmented healthcare system, where care provider collaboration traditionally only occurs locally.

Not long ago, a patient's medical record maintained by a primary care provider wasn't accessible to a specialty care provider. This lack of visibility resulted in a slew of problems for the patient—from medications to health directives that were often contradictory. Today, virtual care platforms not only enable the sharing of data between care providers but also the collaborating of care teams in a hybrid model.



Health system CIOs, CTOs, chief strategy officers and chief digital officers are now creating their digital journey roadmaps for patients. These roadmaps must delight consumers but also identify a way to extend services outside of the in-person setting.

Joe DeVivo

President, Hospital and Health Systems

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The path forward

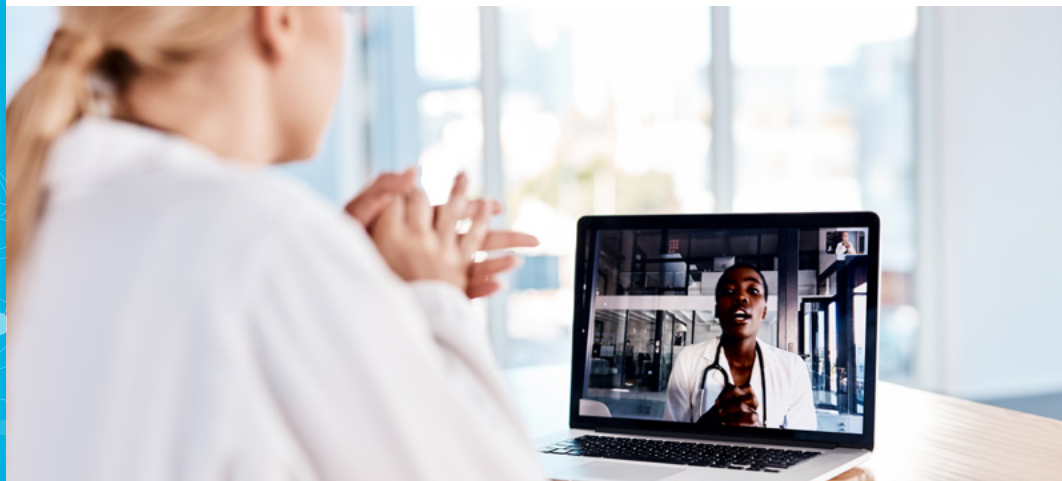
Virtual care wasn't created to replace in-person care. It isn't an "either-or" proposition but rather an "and." It has the potential to support and augment health systems and care providers. This hybrid model is the future, to everyone's benefit. Combining traditional, in-person healthcare visits with virtual care expands the capability and capacity of health systems. It removes geographic barriers to care, enhances care team collaboration across specialties, including mental health, and enables clinicians to provide more continuous and proactive care. In addition, it enhances consumer engagement—getting individuals more involved in their healthcare journeys as they schedule appointments, complete wellness check-ins, better manage their chronic conditions and complete post-procedure follow-ups virtually.

A collaborative, hybrid model of care delivers improved outcomes

The benefits of this new hybrid clinical model become even more powerful when virtual centers of excellence are integrated to enable collaboration between primary care and specialty providers who can consult on complex health needs.

This approach enables traditional and virtual care providers to practice at the top of their license, delivering the best possible care to consumers at every turn.

As more people come to expect seamless and integrated care, clinical collaboration will become the norm, resulting in true whole-person care.



04

Perspective

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Whole-person virtual care will foster a new type of healthcare experience—one where our health will be enhanced in real time and connected to the healthcare system, reducing risks, time, and increasing access, quality and efficiency.

Carlos Nueno

President, International

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Whole-person virtual care leverages technology to enhance the consumer experience

Consumers across the globe have widely adopted digital services into their everyday lives, from bill paying and vacation planning to videoconferencing and grocery shopping. These are highly personalized, efficient and convenient experiences that now influence consumer expectations in every aspect of their lives—including healthcare.

But the consumer experience in healthcare has traditionally lagged behind other industries and continues to play catch-up, especially when it comes to personalization and convenience. With the continued evolution of telehealth and consumer remote monitoring devices, new virtual care modalities focus on providing increasingly personalized care experiences.

Although the technology already existed to enable a more modern healthcare experience, it took the global pandemic of 2020 to accelerate adoption of virtual care and remote patient monitoring, and challenge certain preconceived notions among consumers and clinicians alike. This pivotal moment opened minds to the impact technology can have on building a better healthcare experience and made virtual care a trusted, go-to resource for many. Seventy-six percent of consumers report being interested in using telehealth going forward.





We're transforming the healthcare experience in ways that delight consumers. Our unique combination of data, behavioral science and real consumer insights at scale create a personalized experience that people love and that drives engagement.

Stephany Verstraete

Chief Marketing and Engagement Officer

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Consumers expect a more personalized, frictionless healthcare experience

With eyes now open to the emerging ability to receive personal, highly relevant and frictionless healthcare using technology, consumers have continued their use of virtual care beyond the demand created by the pandemic. Consumers appreciate the convenience and high level of quality and service virtual care delivers. [One report](#) found that, on average, 80% are likely to have another virtual visit, even post-COVID-19. Most consumers are satisfied with their visits and say they will use this type of care again.

Authors of a [Deloitte Insights article](#) noted, "We think virtual health will be the near-default option for well-being and care in the future of health. But even today, virtual health has shown value in improving well-being and care delivery, along with better patient engagement and experience."

The path forward

This pandemic-driven boost in adoption has moved the healthcare industry beyond a tipping point and made virtual care synonymous with healthcare. Technology enables the superior delivery of a virtual whole-person experience that is truly transformational. The consumer experience builds from the moment a person enters the digital "front door" and is greeted with a convenient pathway of choice based on their unique health needs. The objective is to further enable seamless, personalized experiences, resulting in virtual-first use patterns. The experience provides immediate convenience in a digital format that users adopt on their terms.





Whole-person health is this powerful idea that says, ‘We’re not defined by our conditions.’ It’s an opportunity to rethink the way we consider the healthcare needs people have, taking in all of their available information and combining it with the clinical expertise and behavioral science that we can bring to bear to deliver a tailored, personalized experience that helps people make informed, healthy decisions on a daily basis.

Amar Kendale

Chief Product Officer

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Optimizing consumer engagement and experience with applied behavioral science

As people continue to access virtual care, they create a digital footprint that personalizes their health journey. From proactive “nudges” that encourage people to take the next health action to biometric readings and virtual care engagement history, each virtual care interaction results in more data that helps strengthen the overall experience. This information helps determine the level of assistance individuals receive, including post-visit recommendations from their care team.

Applied behavioral science and in-depth consumer insights work in concert to create meaningful experiences. The result is the continued adoption of digital health services, consumer engagement and long-term behavior change.

A broad spectrum of services from wellness to chronic condition management all work together to delight individuals who turn to virtual care. Care providers are available when it’s convenient for the consumer—in sickness and in health. And each virtual visit experience builds trust and confidence, resulting in an experience that is personalized and memorable.

Indeed, technology combined with biometric readings, medical history and virtual care engagement history brings care and more human interaction to people where deep gaps in care once existed. People are able to speak with a therapist, a physician, nurse or a health coach at the moment they need them. Combining technology with human interaction, personalization and clinical expertise enables whole-person virtual care that truly transforms the healthcare experience.



05

Perspective



Teladoc Health is passionate about taking care of people. Providing people around the world access to even the most basic care is fundamentally important. With virtual care, we can really get the right care to the right place at the right time.

Yulun Wang, Ph.D.

Head of Research & Development

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Whole-person virtual care extends healthcare to underserved populations around the world

Current information about access to quality healthcare around the world is sobering. A [WHO study estimated](#) half the world's population can't obtain essential health services. The study also reports that 800 million people spend at least 10% of their household budgets on health expenses for themselves, a sick child or another family member. [A Gallup study](#) found that prior to COVID-19, a third of U.S. adults said their family couldn't afford care in the past year; 1 in 4 said care was deferred for a serious medical condition.

The circumstances are equally bleak for those with mental health needs. Mental health services have been under immense strain—in part due to COVID-19 as well as a shortage of mental health professionals.

- The number of people looking for help with anxiety and depression increased dramatically in 2020. In the first nine months of the year, there was a [93% increase](#) in people seeking anxiety screens and a 62% increase in those seeking depression screens.
- The shortage of mental health professionals continues to worsen. According to the [Substance Abuse and Mental Health Services Administration](#), there will be a shortage of 15,000 psychiatrists and 27,000 mental health counselors by 2025.
- Forty percent of patients who have sought mental health treatment through Teladoc Health said they would not have received care without a virtual option.

Virtual care services that offer comprehensive medical and mental health services, however, can help ameliorate healthcare accessibility and affordability issues and serve people all over the world.

The path forward

In order to meet the healthcare needs of global populations, access to care must overcome three specific hurdles:

Access to convenient, affordable care

As consumers of healthcare services, people need convenient, timely access to front-line care providers when they need them. Technology plays a significant role in enabling convenient access. Access to mobile devices and the availability of internet service continues to grow each year. Today, there are 6.95 billion mobile device users globally, and this number is projected to grow to 7.41 billion by 2024.

With the right technology tools in place, individuals have the ability to connect with a care provider virtually from anywhere. What's more, new reimbursement models are making virtual care even more affordable.

Access to specialty care

Beyond connectivity and devices, technology enables the development of new virtual environments that are perfectly suited to enhance and support access to specialty care. Getting someone to the right specialist at the appropriate time can be lifesaving—and in some areas of the world, access to specialty care is difficult, if not impossible. Teladoc Health uses technology to connect people with healthcare specialists around the world. Such partnerships enable obstetricians and neurologists, for example, to use virtual care to consult with individuals who require specialty care in rural settings. Virtual care enables this access when it otherwise would not be available or require consumers to travel in order to receive care.





Teladoc Health is using technology in new and novel ways to improve access to care around the world. Virtual care is the great equalizer, getting people the care they need conveniently, faster and more reliably.

David Sides

Chief Operating Officer

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Access to personalized care

Whole-person virtual care delivers a personalized experience—accounting for consumer preferences related to gender, language and personal health habits. Virtual care platforms enable easy access to language interpreters who can help healthcare consumers and clinicians communicate. It is also possible to ensure someone who is hearing impaired has a sign language interpreter to assist during the virtual care visit. In a virtual setting, providers can be matched to individuals based on their unique provider preferences—for example a male, female or LGBTQ+ care provider. In brick-and-mortar settings, accommodating requests like these to personalize care becomes very complex and difficult to do. Virtual care settings make it much more seamless, producing better experiences and outcomes.

With millions and millions of people now turning to virtual care for everyday and complex needs, whole-person virtual care will help all people everywhere access the personalized care they need.



Conclusion

We hope the perspectives shared by our virtual care leaders have provided greater insight into the full potential and future of whole-person virtual care.

Teladoc Health is transforming the healthcare experience and empowering people everywhere to live healthier lives. As the global leader in virtual care, Teladoc Health is recognized for quality, innovation and insights gained through more than a decade of experience serving the world's leading health plans, employers, hospitals and health systems, and patients in more than 175 countries.

Today, virtual care is primed to play an essential role in the healthcare ecosystem. Without question, the opportunity for transformation is upon us. Now is the time to realize the promise and full potential of virtual care. Join us on our path forward as we transform the healthcare experience with whole-person virtual care.

Visit <https://teladochealth.com/perspectives/> for the latest insights.





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About Teladoc Health

Teladoc Health is empowering all people everywhere to live healthier lives by transforming the healthcare experience. Recognized as the world leader in whole-person virtual care, Teladoc Health leverages clinical expertise, advanced technology and actionable data insights to meet the evolving needs of consumers and healthcare professionals.

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