



GlobalMed[®]

Direct To Consumer Programs

Gigi Sorenson RN, MSN
Chief Clinical Officer



Direct to Consumer Market



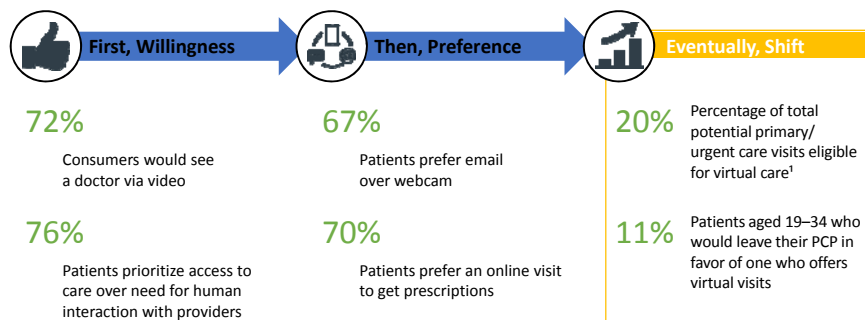
BeWellNow

Direct to Consumer Care Delivery

- Virtual Urgent Care Services
- All Ages
- Available 24/7/365
- Visit Charge is \$49.00
- Prescriptions Available Through Local Pharmacy
 - Health Plan Coverage Applies
- Next Steps
 - Behavioral Health / Primary Care Integration
 - Psychiatric Services
 - Scheduled visits



Patients Favor Accessibility Over Type of Interaction



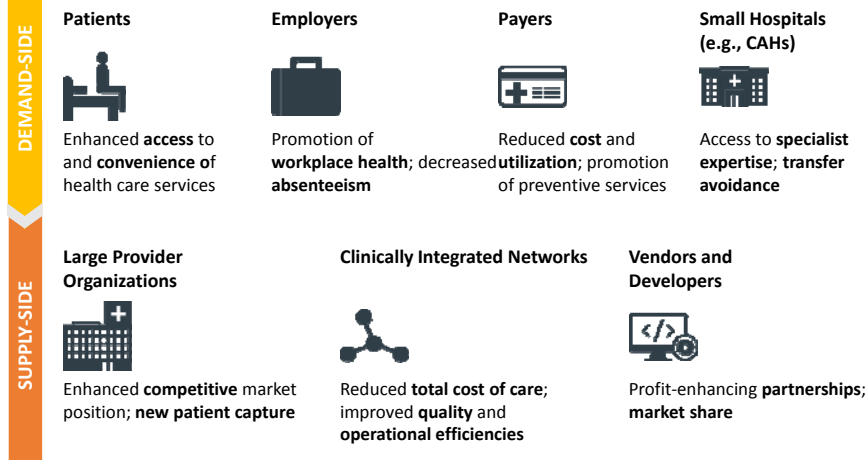
Key Takeaways

- Many patients aren't looking for the same type of intimate doctor-patient relationship of old
- Access to care is top concern
- Virtual interactions are preferable for low-acuity episodes
- Patients are looking for the fastest, easiest access point—no special skills or equipment needed
- Currently, about 1 in 5 outpatient visits could be done online
- Millennial patients are starting to actively choose tech-savvy providers

¹ Source: Pehnic J, "72% of Consumers Are Willing to See a Doctor Via Telehealth Video Conferencing," HIT Consultants, December 11, 2013; American Hospital Association, "Trendwatch": The Promise of Telehealth for Hospitals, Health Systems and Their Communities", January 2015; American Well, "Telehealth Index: 2015 Consumer Survey," 2015; Market Innovation Center research and analysis.

Multiple Groups Vie for Ready Access to Virtual Care

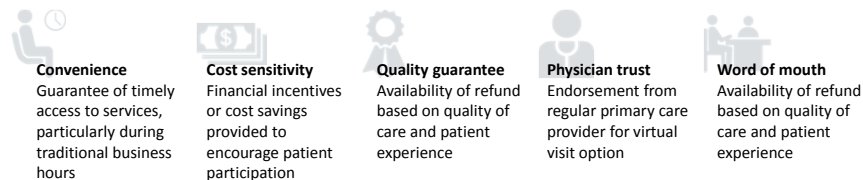
Lines between Partner and Competitor Often Blurred in Telehealth Networks



Planning 20/20 research and analysis.

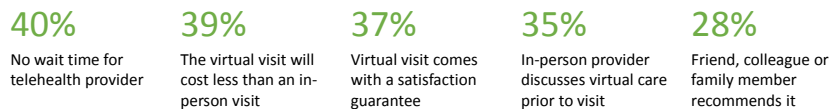
Consumers Willing Under Certain Circumstances

Patient telehealth adoption drivers include...



Patients are definitely/probably willing to try virtual visits if...

Market Innovation Center Consumer Choice Survey, n=4,879



Planning 20/20 research and analysis.

But Only If Quality, Efficacy, and Security Are Assured



Top 5 Concerns Among Consumers

Market Innovation Center Consumer Choice Survey
n=4,879

- 1 | "Quality of the care I will receive"
- 2 | "Possibility that the provider cannot diagnose me or treat me virtually and I will have to go into a physical clinic anyway"
- 3 | "Security of my health information"
- 4 | "Lack of personal connection with the provider"
- 5 | "Cost of the virtual visit is too high"

Seniors Disproportionately Impacted by Technology Requirements



Adults 65+ report that they are

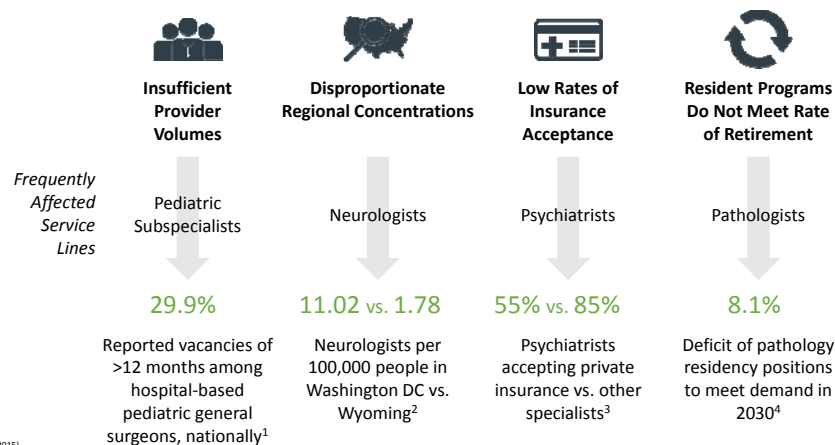
3 times less likely

to have the technology they need to do a virtual visit, relative to younger cohorts

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Smaller, Community Spokes Look to Beat Shortages

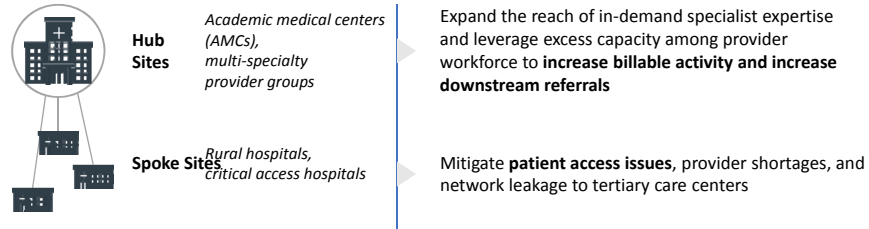
Drivers of Provider Shortages across Service Lines



1) Gage D (2015).
2) Avitzur O (2010).
3) Robboy SJ (2013).
4) Cummings JR (2015).

Sources: Gage D, "America's Children Need Access to Pediatric Subspecialists," American Academy of Pediatrics, <http://www.aap.org/press/Sec52013FactSheet.pdf>; Avitzur O, "Practice Management in Neurology," Neurologic Clinics, 28 (2010):537-561; Cummings JR, "Rates of Psychiatrists' Participation in Health Insurance Networks," JAMA, 313, no. 2 (2015):190-191; Robboy SJ, et al., "Pathologist Workforce in the United States," Arch Pathol Lab Med, 137(2013):1723-1732; Planning 20/20 research and analysis.

Hub Sites Offer Consults, Expand Their Markets



Business Models for Hub-Spoke Telehealth Networks

<i>More common in competitive markets</i>		<i>More common in collaborative markets</i>		
Set-up, equipment fee, plus contract fee for utilization	Flat annual contract for set number of visits + per click fee for additional volume	Per consult or per bed fee (ICU, ED)	Flat annual or multi-year contract fee; often low or paid for by grant support at CAHs	No fee, expected downstream return from transferred patients

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gsorenson@globalmed.com

