



Virtual Care: Healthcare at Your Fingertips

Church Benefits Association

December 4, 2019



Agenda



Teladoc Health Overview



The Evolution of Virtual Care



Mental Health in the Workplace



2020 Predictions for Virtual Care



Teladoc Health is the global virtual care leader

TDOC

publicly-traded on NYSE

+2,200

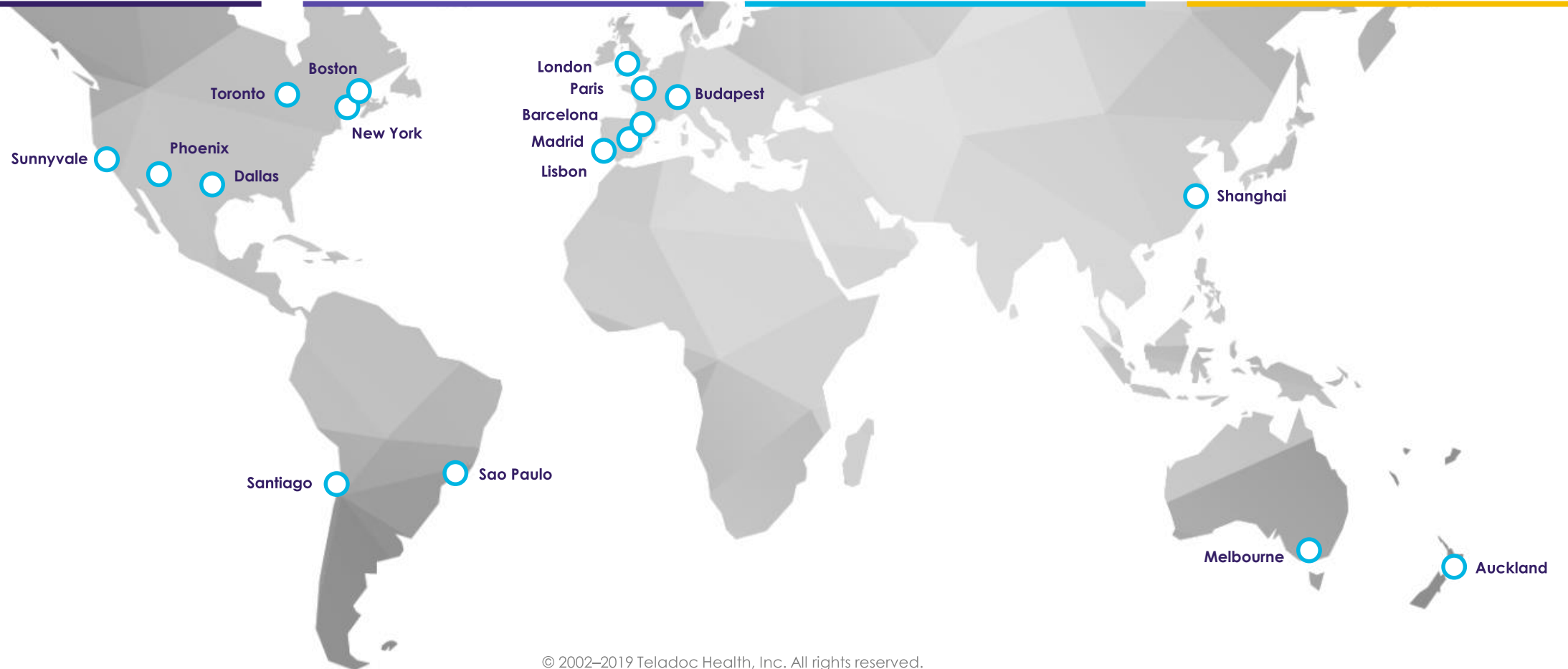
employees worldwide

+450

medical sub-specialties

+9 million

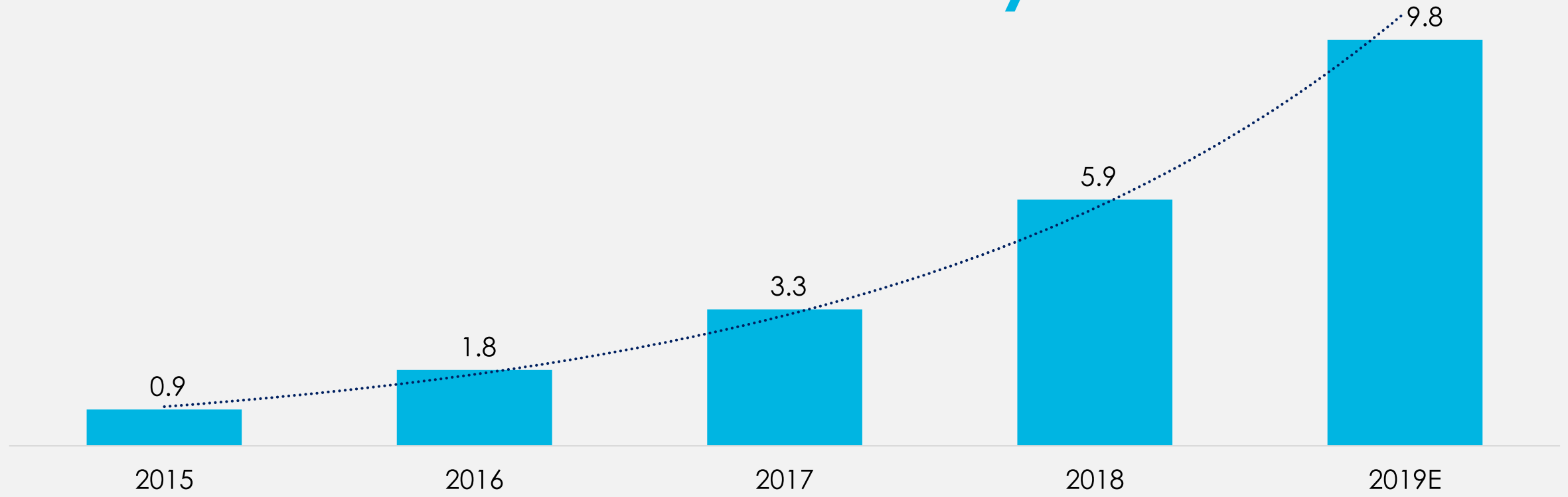
virtual care visits since 2015



Accelerating adoption

Cumulative Visits (millions) Since 2014

>9 million cumulative by YE 2019



The Evolution of Virtual Care

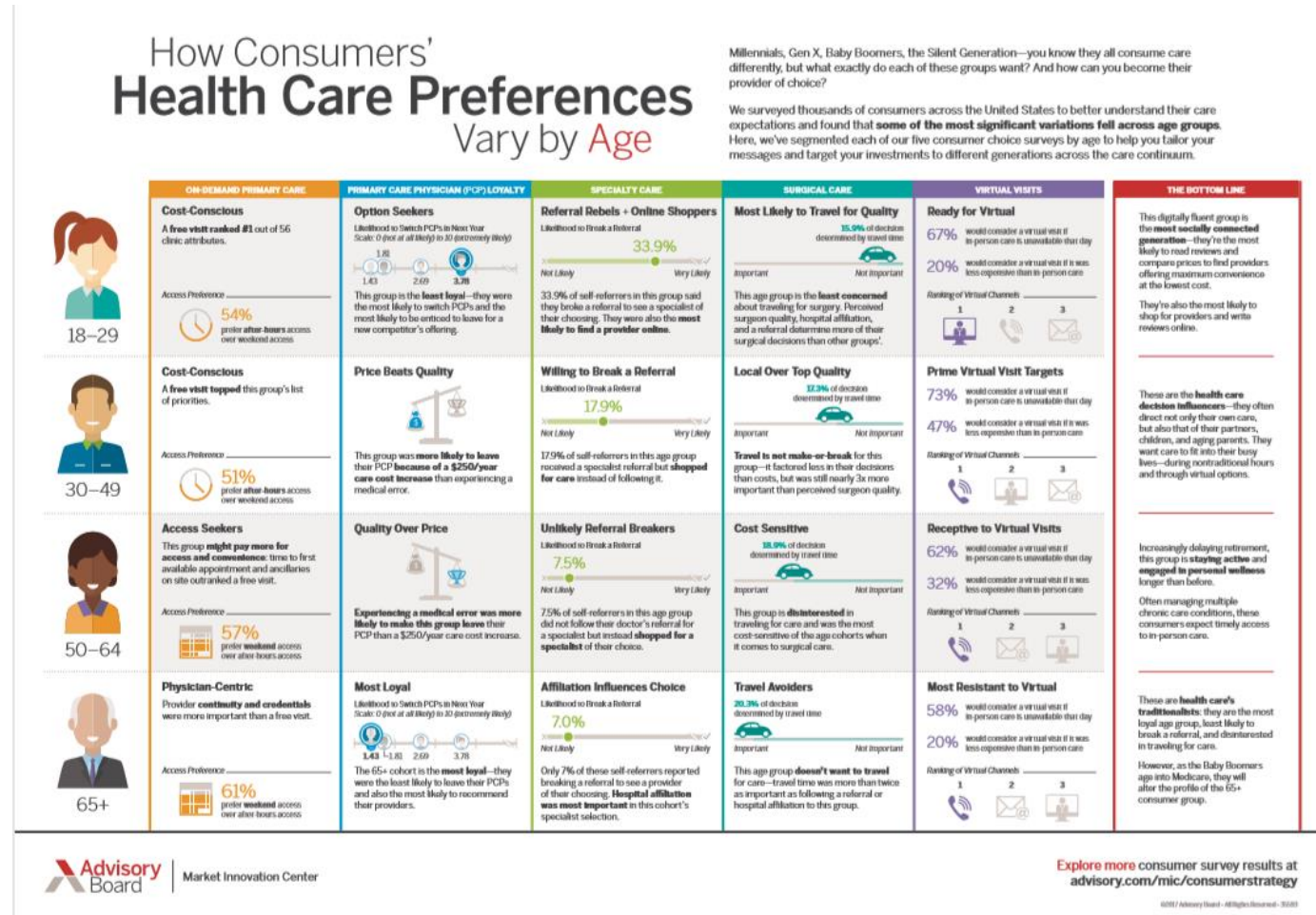


Virtual care today.
A member's current
experience.



Consumers Health Care Preferences Vary by Age

- **Millennials (18-29):** Most likely to search for providers based on maximum convenience and lowest cost
- **Gen-X (30-49):** Want care to fit into their busy lives—during nontraditional hours and through virtual options
- **Baby Boomers (50-64):** Prefer in-person care, but over 60% interested in virtual care options
- **Silent Generation: (65+):** Healthcare traditionalists who strongly prefer in-person care, but 50% interested in virtual care options



1 Advisory Board, How Consumers' Health Care Preferences Vary by Age

Consumer trends are driving growth in virtual care



Confusion about services available



Millennials abandoning traditional options



Increased consumer cost burden



Convenience expectations changing



System complexity

As these challenges overlap, it becomes that much harder to be a patient today.

Virtual care is optimized
to serve as
a front door
to support and streamline
the healthcare experience.

Video

Phone

Text

Picture

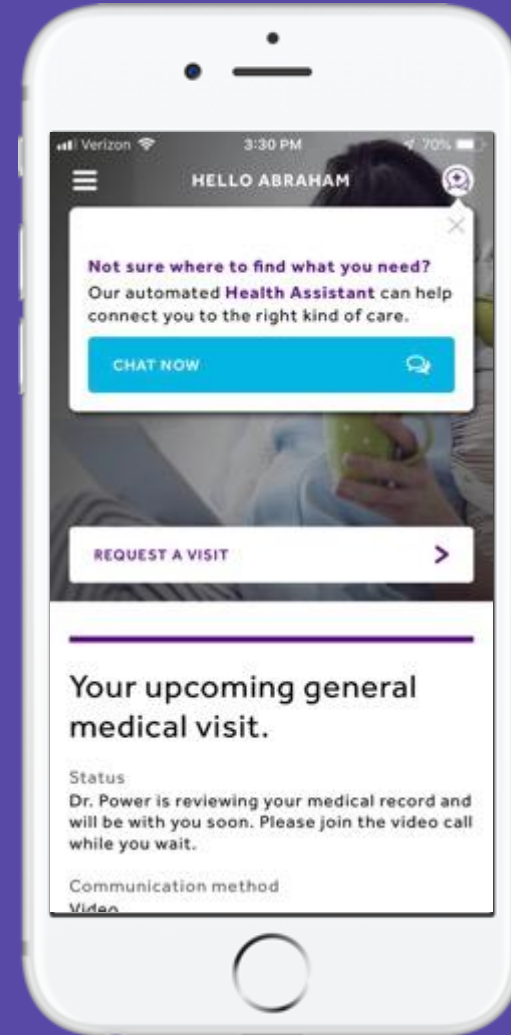
Health
Assistant

Anxiety and
depression

Surgery
support

Anytime,
anywhere care

Diagnosis and
treatment



Expert
advice

Skin
issues

Caregiving
support

Find a
doctor

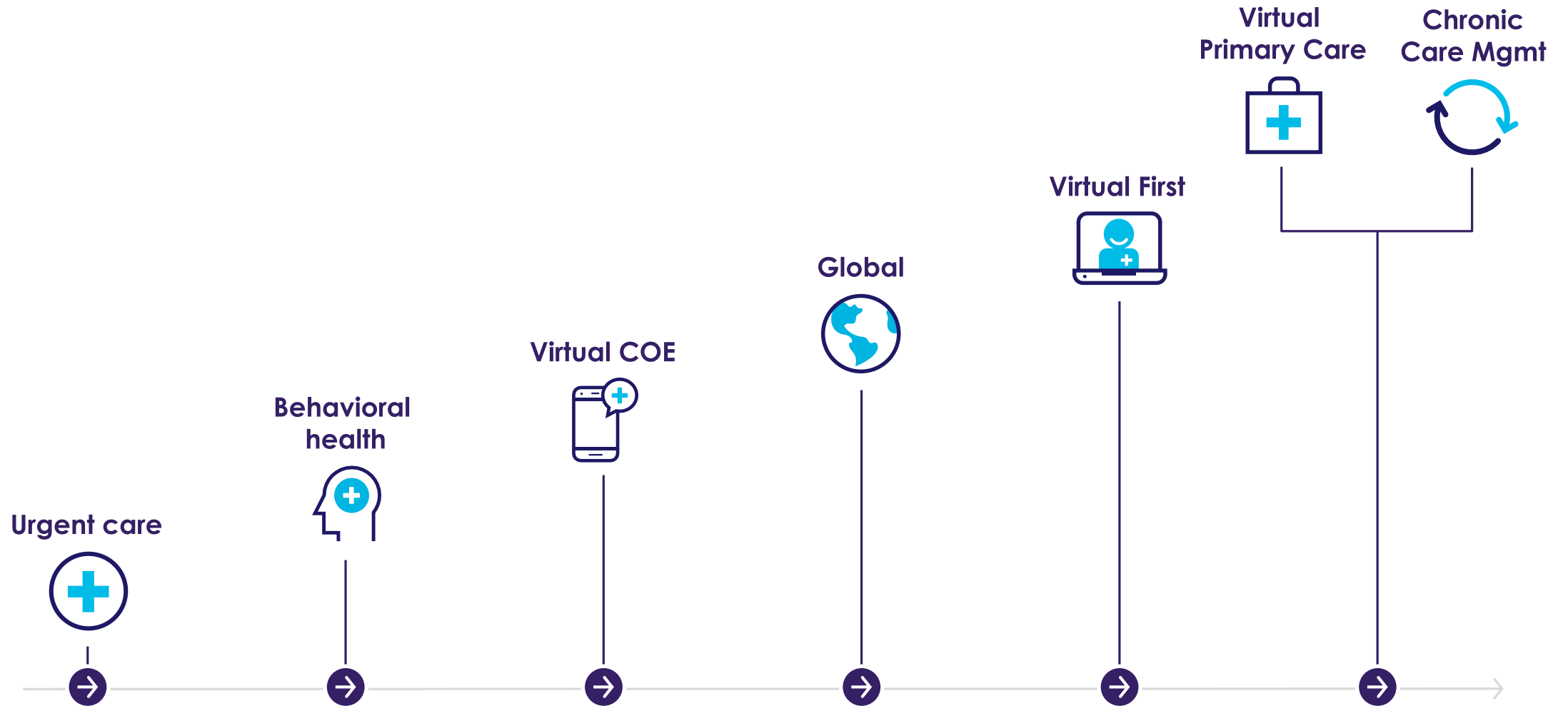
Mobile

Web

Call Center

Community

The evolution of virtual care



Mental Health in the Workplace



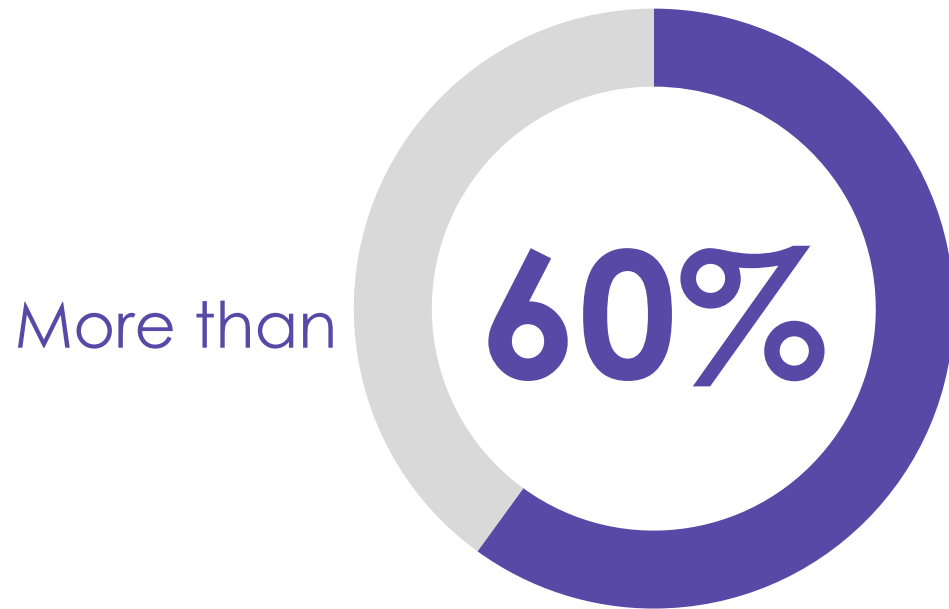
Assessing the impact of mental health on members at work

Findings provide new insights to health plans



Results from our new international study on mental health reveal the true scale of challenges in the workplace – from the magnitude of under reporting of mental health conditions to what prevents people from seeking the support they need.

Members are struggling at work

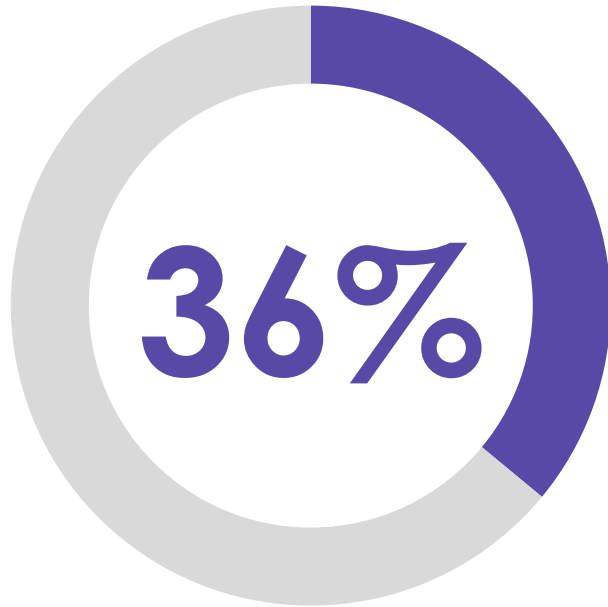


of diagnosed mental health conditions are **depression and anxiety**

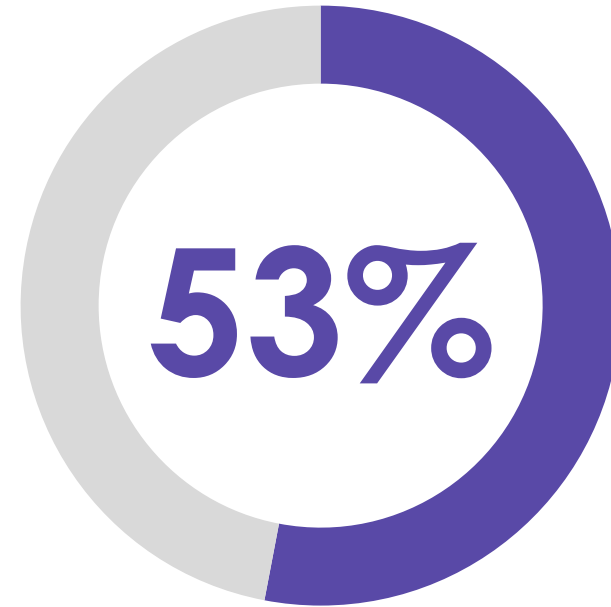


felt mentally and emotionally healthy in a 2-week period

Awareness of where to find help is lacking

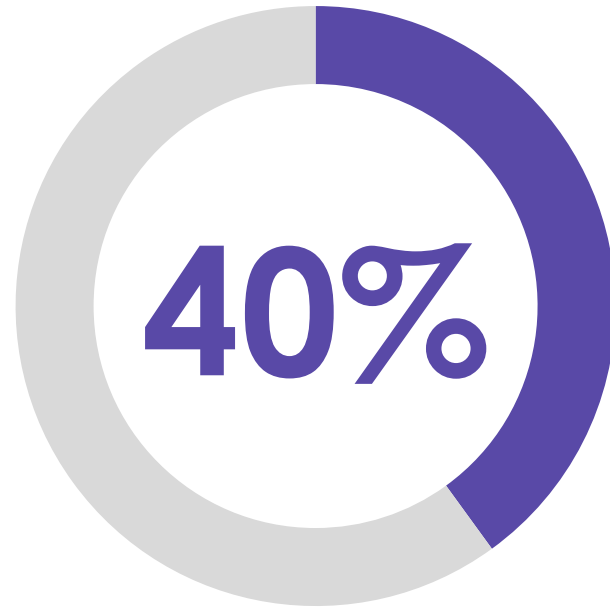


are not aware of what resources are available to them in the workplace



believe more should be done in their workplace **to promote better mental health**

Now is the time to make mental health a priority



of members at work **welcome remote mental healthcare**

Behavioral Health Care benefits



Easy access to therapy

- Service delivery in **safe, non-stigmatized environment**
- Available **wherever** members are, over **65%** of visits are via **video**
- Average time for Teladoc Health provider response to initial contact is **less than 8 hours**. Average time to complete first visit is **less than 7 days**



Helping members access help for a variety of issues

- **Anxiety and depression** are most common diagnoses
- **Other common conditions treated:** PTSD, stress, panic disorder, family and marriage issues, grief, trauma resolution, work pressures, ADHD
- Members have an average of **4-5 visits**

Overcoming barriers to usage

“We believe driving engagement is our responsibility.” – Jason Gorevic, CEO, Teladoc Health

Destigmatizing mental illness and treatment



“I gave Teladoc a try on my lunch break and have to say that I am feeling 100 times better.”

Kathleen
Working mother with three kids, 30s



Right time



“Therapy was intimidating at first, but when you realize it’s just talking to someone, it becomes easier.”

Josh
College student, 20s



Right place

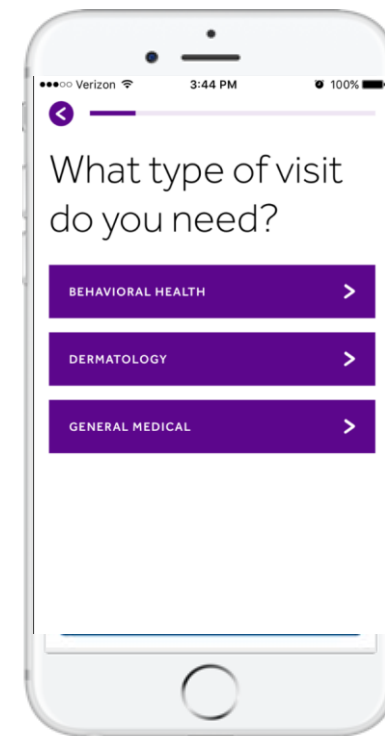
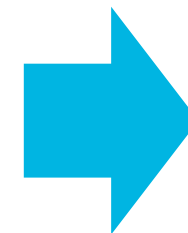


“Teladoc has helped me begin to rebuild my life and happiness while letting go of the fear and anxieties that were holding me back.”

Tina
Working professional, 40s



Right message



The value is clear

Caring for members with
mental health issues pays off

4x*

*According to the World Health Organization, \$4 is returned to the economy for every \$1 spent caring for people with mental health issues.

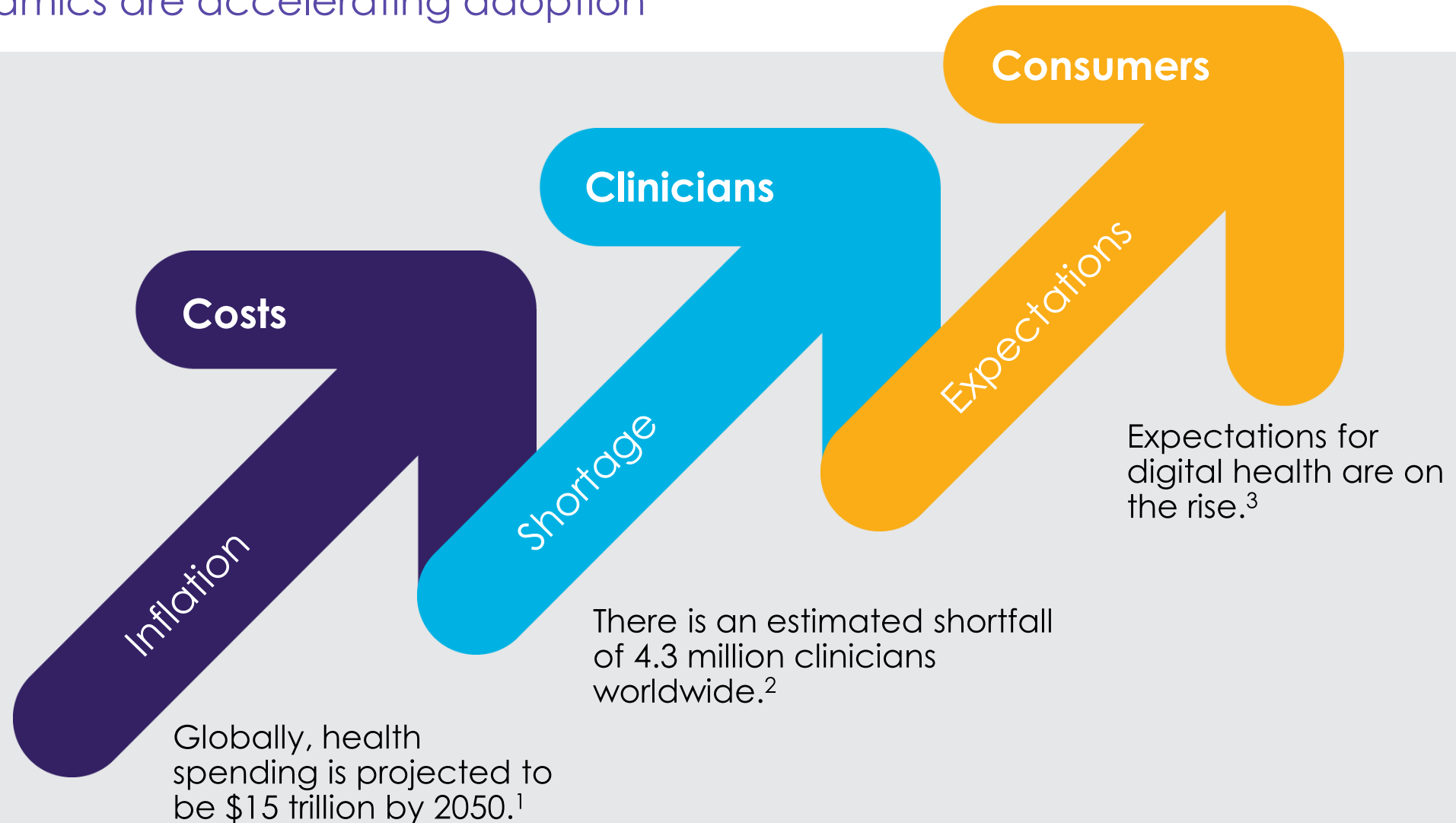


Our 2020 Predictions for Virtual Care



Virtual care is essential to high-quality healthcare

Market dynamics are accelerating adoption





In 2020, prepare for virtual care to take center stage.

Its convenience, quality, and value are optimized to serve as the 'front door' to healthcare.

PREDICTION #1

Virtual care becomes a top priority beyond plan sponsors and care providers.

With mounting pressures to improve access while controlling costs, organizations require strategic partnerships and innovation to expand virtual care.

PREDICTION #2

Consumers demand integrated, personalized care on their terms.

As adoption accelerates, savvy consumers expect more from virtual care: technology enables high-touch, high-quality experiences.

PREDICTION #3

Virtual care closes the access gap for mental healthcare.

With burgeoning needs around the world, virtual care is essential to make convenient, confidential mental healthcare available for all.



PREDICTION #4

As people live longer with chronic diseases, virtual care alleviates the burden of care.

Virtual care extends healthcare to the home, helping caregivers and healthcare professionals serve an aging population.

PREDICTION #5

Virtual care delivery is an essential skill for all physicians

To practice high-quality modern medicine, doctors must be able to effectively engage with patients remotely.



Thank you

Bill Hepfinger
Area Vice President
Teladoc Health
whepfinger@Teladochealth.com
412-996-1381

