



# *Telehealth Intelligence:* A 2016 Market Update on News, Trends, & Implementations

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# Agenda

- Welcome – Icebreaker
- Market Drivers for Telehealth
- Telehealth Market Growth
- Top 5 Telehealth News Stories & NC Impact
- Top 5 Telehealth Trends & NC Impact
- Key Case Studies and Implementations
- Future Outlook / Recap

# Market Drivers for Telehealth



**Current models of care are becoming unsustainable.** The number of people needing care is expected to quadruple by 2050, placing extreme demands on care cost and delivery



The cost of healthcare is **expected to increase annually by >5% through 2020**



**Reimbursements are decreasing and shifting** to payment based on **patient outcome and wellness.**



**Re-admission penalties** require more proactive and preventative care capabilities



**Health reform** has made large numbers of new patients eligible for care and provides an additional driver to keep care local and in the home

# Telehealth Market Growth

Telehealth Growth Area	Activity
2016 General Market Outlook for Telehealth	Robust market growth predictions in the U.S. and Internationally
States with Telehealth Parity Laws	29 states and Washington, D.C. have parity laws; 8+ states have parity legislation proposed
Payers Supporting Telehealth	More payers are offering and reimbursing for Telehealth
Reimbursement for Telehealth	Improving, but much more needs to be done
Employer Support for Telehealth	Increased Telehealth offerings in employer health plans
Consumer Support for Telehealth	Strong and increasing; >15M TH encounters in 2015
Venture Capital Telehealth Investment	2015 was a strong year and raised more than 2014
States Supporting the FSMB Interstate Medical Licensure Compact	12 states have adopted; 14 states have introduced the compact

# Top Telehealth NEWS for 2016



1

**ATA Establishing Center for Telemedicine Evidence, Telehealth & Med Today Journal**

2

**Policy & Laws (Federal, State, & Private)**

3

**Consumer Use & Knowledge (2015 = 27%+)**

4

**Direct to Consumer Vendor Arms Race**

5

**Market Estimates (\$45 Billion by 2021)**



# Top Telehealth Trends for 2016



1

**Improving Reimbursement**



2

**Employee & Employer Telehealth**



3

**Telehealth Technology Sophistication**



4

**Telehealth Governance / Leadership**



5

**mHealth**



# Key Case Studies & Implementations

## 1. National TeleHospitalist Program

- Developed Clinical, Technical, Operating and Financial models
- Build, Deployment, Implementation, Operation
- Centralized Telemedicine Service Center (TMSC) staffed by Hospitalist physicians
- Rural Hospital, Physician, and Patient Results

## 2. International Pediatric TeleOrthopedics & TeleBurn Program

- Developed Business Plan
- Build, Deployment, Implementation, Operation
- Established Telehealth Organizational Structure
- Patient, Travel, Convenience, Rural/Unmet Need Specialty Access Results

# Recap

- Market
- News
- Trends
- Case Studies & Implementations
- Check me out on Twitter for the latest of each of these:





THE END...

Questions 😊