



Quarantine and isolation are creating significant momentum for telehealth's first big test. The outbreak of the COVID-19 pandemic led many health ministries to recommend patients telephone physicians and stay away from the doctor's office. For the first time, non-physical diagnosis and treatment became an advantage and officially prioritized by health authorities. These factors and real-world use cases are creating a place for telehealth that will likely last after the pandemic:

- **First movers in the market have increasing numbers of users.** Providers responded to the system need and offered their services for free, winning a reputation bonus and motivating hesitant doctors and patients to participate.
- **Healthcare systems adapted quickly** and created exceptions to regulations for telehealth. For example, in Germany, insurers and doctors agreed to lift the regulation to treat a maximum of one-in-five patients per quarter exclusively by video.
- **Patients are slowly accepting telehealth.** Telehealth providers shared data indicating a rapid increase of users in March. According to Swedish telehealth provider KRY, the number of telehealth video consultations increased 219% in March 2020. According to an APCO Insight poll, 87% of Americans think it is likely that more healthcare services will be available remotely or virtually in 2021 as a result of the pandemic and 58% say they are more likely to use those services in the next three months.

It looks like telehealth is here to stay. Once settled through the COVID-19 pandemic experience, the market will stabilize, diversify and tackle the next futuristic projects—but this time with support and acceptance. In this context, there are a number of opportunities which are crucial to consider for telehealth's stakeholders in order to be ready to leverage the opportunities of the post-pandemic telehealth market.

Transforming the Growing Acceptance and Integration of Telehealth by Health Systems Into New Market Opportunities

COVID-19 has created what has been described as a "black swan" moment as acceptance rates have increased, and in the process, services have proven their value. This proof of concept empowers providers and doctors to engage in the negotiations needed to become profitable. While there still are policy hurdles, telehealth providers now have support for reimbursement and doctors can argue for the same rates for video consultations as for in-person meetings.

In addition, doctors have already invested in expensive software and equipment, and integration of these services into existing workflows will be instrumental to a streamlined experience. Also, this is not a one-way street; patients have a vested interest in sharing healthcare data from their smart devices with their trusted physicians. An interface-free process is the basis for an easy user experience on all sides.

APCO Worldwide can facilitate the future political conversations on pricing and reimbursement of telehealth solutions and help develop new narratives to support their integration in health systems by:

- ✓ Conducting extensive landscape analysis to identify enablers and challenges to deeper integration.
- ✓ Monitoring and assessing ongoing policy developments.
- ✓ Supporting the development of ambitious engagement strategies with political stakeholders to promote the development of this critical change to health systems.
- ✓ Applying digital research and data science capabilities to scan the relevant conversations taking place and conduct stakeholder research to help actors position themselves in the debates.
- ✓ Creating a narrative that supports reimbursement goals for the wider public to create public relevance and start media outreach.

Anticipating new Demands for Users and Providers Alike for Diversification to Achieve the Full Potential of Telehealth

We will see diverse telehealth services. Indeed, first steps are already being taken by pediatricians and midwives, and experts expect a demand for mental health services after the COVID-19 quarantine and isolation. Especially in mental health, an increased demand will create momentum to make video consultation the new normal. The U.S. Drug Enforcement Administration relaxed in-person office visit requirements for Schedule II and higher controlled substance prescriptions as long as a real-time, interactive audio-visual communication takes place.

Although video consultation was the first step, it was merely a baby step. During the ongoing COVID-19 pandemic, a virtual hospital opened in Germany and made an even bigger case for telehealth—the exchange between highly skilled experts connected to hospitals in rural areas. This exchange of knowledge and resources successfully addresses very structural problems: funding of hospitals and access to experts.

APCO can support the identification and deployment of new telehealth solutions by:

- ✓ Conducting opinion research and stakeholder mapping to better understand patients' needs and wants when it comes to telehealth and identify new opportunities.
- ✓ Developing communications strategies to optimize the launch of new solutions on the market.
- ✓ Highlighting competitor communication and consumer reaction to better understand the competitive dynamics of the market.

Addressing key Cultural and Structural Challenges to Telehealth Deployment

The hands-on experience with telehealth will do more to change doctors' minds about new digital solutions than advance preparation ever could, with more practitioners accepting it as being instrumental for diagnosis and treatment. Through this cultural change they can offer more comprehensive healthcare services and have greater success reaching those who are movement-restricted (e.g., retirement homes) or have a complicated lifestyle (e.g., urban nomads).

Despite its advantages, telehealth exposes a very fundamental challenge: internet connectivity. There are still blind spots with no or very weak internet, especially in rural areas where telehealth could be a game changer. Overcoming these limitations will require concerted efforts to address disparities in internet access, and telehealth can make the argument for this change.

APCO can help prepare and implement innovative approaches to advocacy to help stakeholders navigate the challenges to the deployment of telehealth by:

- ✓ Identifying the political, cultural and structural challenges that could impede the deployment of innovative telehealth solutions.
- ✓ Developing and implementing ambitious stakeholder coalitions to enable the deployment of holistic, cross-sectoral solutions to address such challenges.
- ✓ Forming proactive communications strategies and disseminating messaging to key audiences through media and social media campaigns.