



# THE PERFECT STORM

HOW COVID-19, THE GIG ECONOMY,  
AND CONSUMER EMPOWERMENT  
ARE FINALLY CHANGING HEALTHCARE

SEAN MEHRA • FOUNDER & COO

**HealthTap**

# AMERICA WAS ALREADY CHANGING

**Less than half of U.S. companies offer health insurance to their employees (Kaiser Family Foundation)**

**43% of U.S. workers are contractors, and therefore not eligible for employer-provided healthcare benefits (International Labour Organization)**

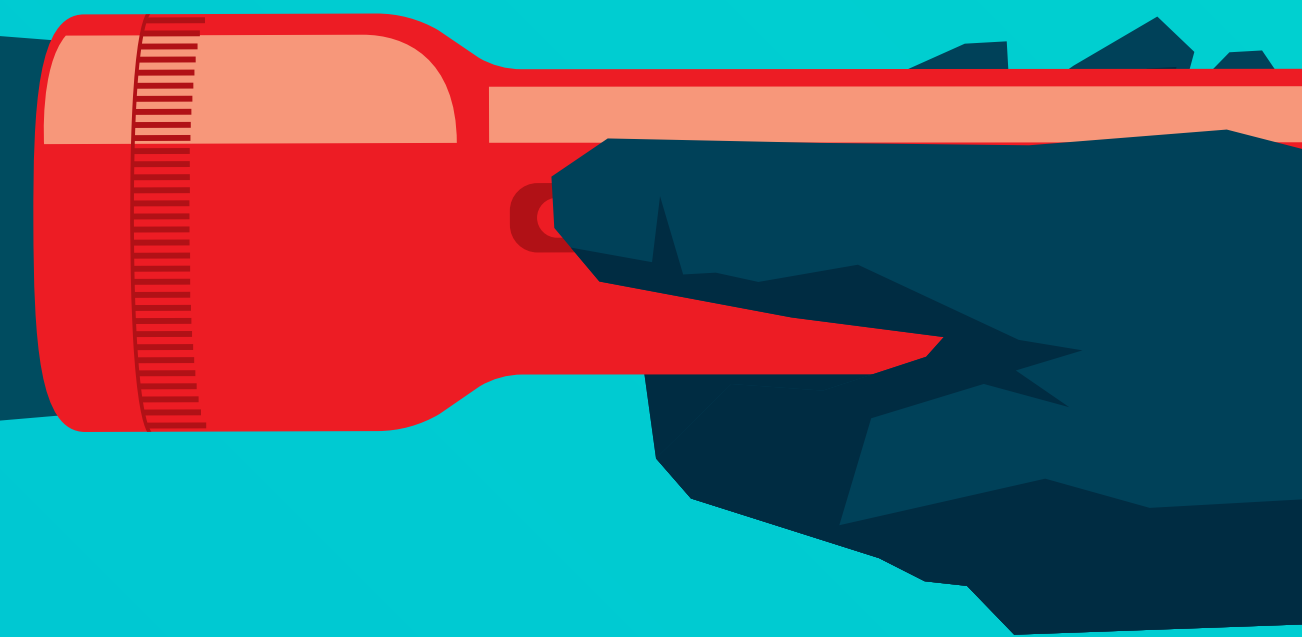
**Consumers no longer need a middleman for major activities like buying and selling real estate, cars, and trading stocks**



**THEN CAME 2020...**

**...WHAT THE ?!?!?**

**THE  
BRIGHT  
SIDE**



# WHAT YOU'LL HEAR ABOUT TODAY

1. **Explosion of healthcare startups**
2. **Top health concerns of U.S. workers, before and after**
3. **How workers are using telemedicine today**
4. **NEW industry data telemedicine as a benefit**
5. **Navigating the dynamic telemedicine landscape**

# ME CIRCA 2008

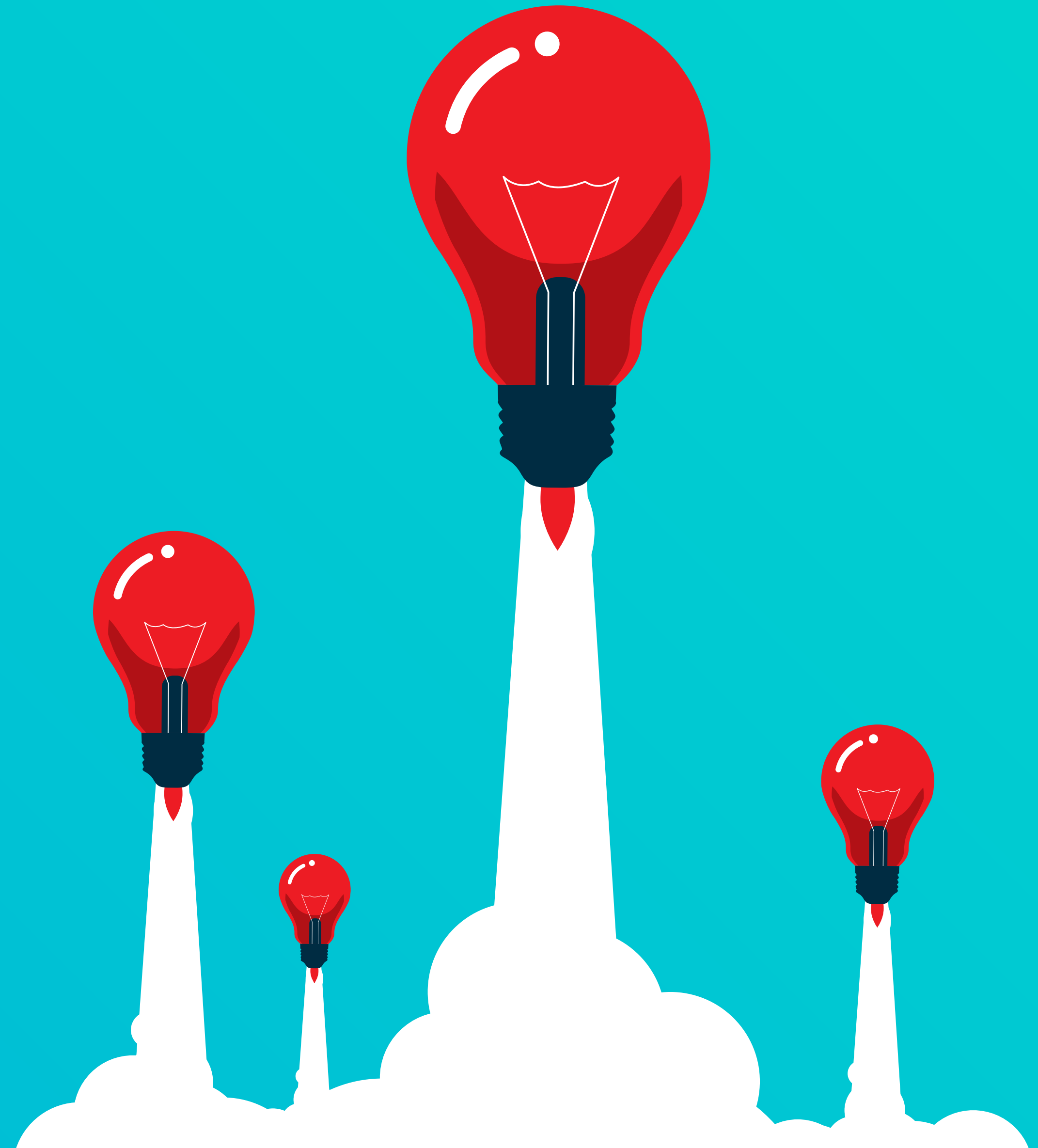




# A STARTUP EXPLOSION

**8,000 HEALTHCARE STARTUP  
IN THE LAST 10 YEARS.**

(Most of them trying to sell you something) :)





# HEALTHTAP'S FOUNDING PREMISE: A "MARKETPLACE"







do i have  
do i have **adhd**  
do i have **anxiety**  
do i have **depression**  
do i have **diabetes**  
do i have **the flu**  
do i have **add**  
do i have **autism**  
do i have **ocd**  
do i have **applecare**  
do i have **a right**

Google Search

I'm Feeling Lucky

Report inappropri

# WE STARTED WHERE CONSUMERS START

Way before they decide to visit a doctor

**20x** more frequently

**1B+** searches/day

**0.8B+** visits/year

\* in U.S. alone



# ...BUT WE ALSO KNEW THAT THIS JUST MAKES THINGS WORSE

## No context

headache × 🔍

[ALL](#) [IMAGES](#) [NEWS](#) [VIDEOS](#) [MAPS](#)

Headache: Could It Be a Brain Tumor? - Johns Hopkins Medicine  
Johns Hopkins Medicine › wellbeing › h...

Some brain tumors do not cause headaches at all, since the brain itself isn't capable of sensing pain. Only when a tumor is large enough to press on nerves or vessels do they cause headache.

You visited this page on 12/11/18.

## No content

I've had a piercing headache two we × 🔍

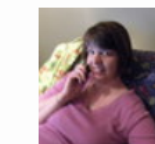
[ALL](#) [NEWS](#) [IMAGES](#) [SHOPPING](#) [VIDEOS](#)

Stomach Pain After Bariatric Surgery - Princeton Health  
Princetonhcs.org › resources › articles-tips

Following weight loss surgery, the “feeling of fullness” that you might experience after eating too much solid food is different from the “feeling of  
Missing: **piercing headache metformin**

## No trust

### Comments (12)



**CCSMomm**

Posted 02/18/2012

Not sure about the others but there is no sugar in gatorade.



**Razberri97**

Posted 02/18/2012

I'm not sure if this is good advice or not but you could put a squirt of MIO in it to flavor it different. MIO is 0 calorie but

“...health content on the web can be difficult to navigate, and tends to lead people from mild symptoms too scary and unlikely conditions, which can cause unnecessary anxiety and stress.”

— Google Official Blog, 2016

# THE "BIG IDEA"

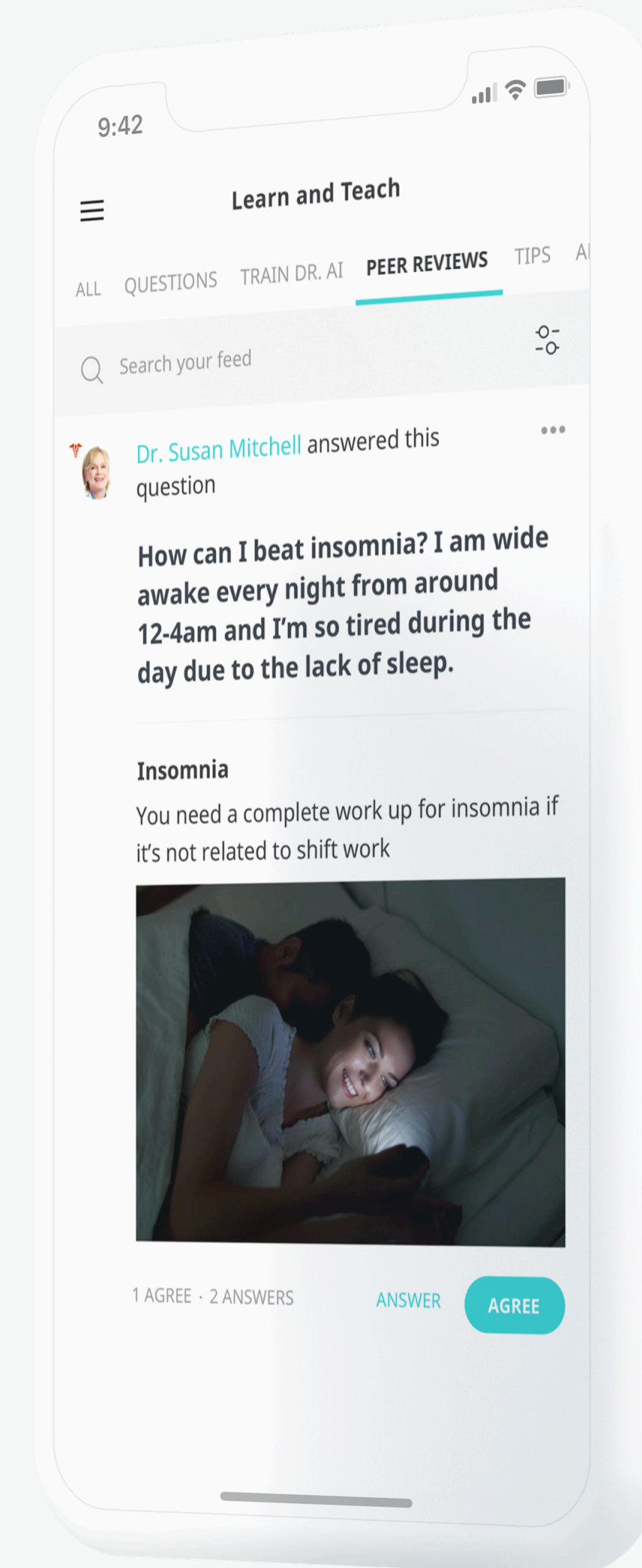
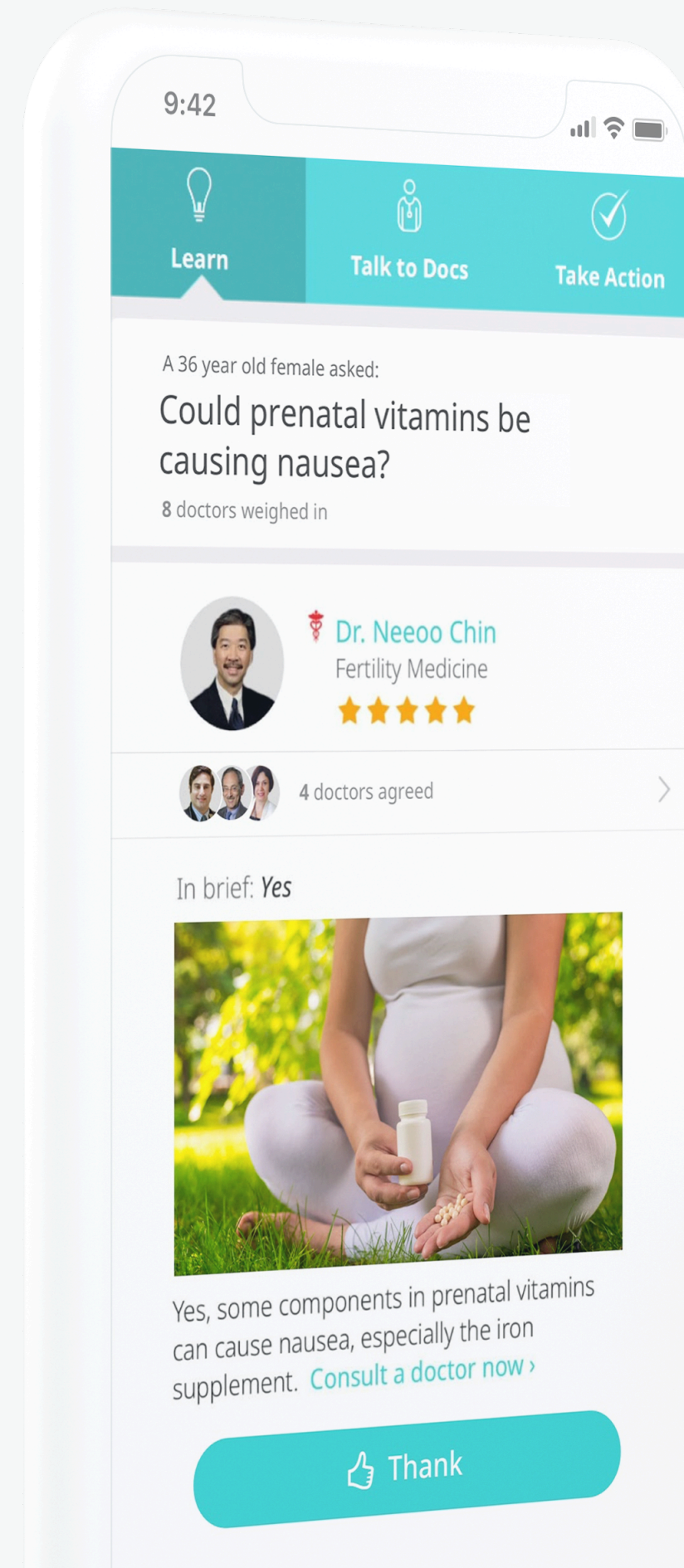
A "marketplace" of millions of searchable doctor-answered questions



**Consumers**

**1,700,000+**  
questions answered

**1,800,000+**  
thank you's



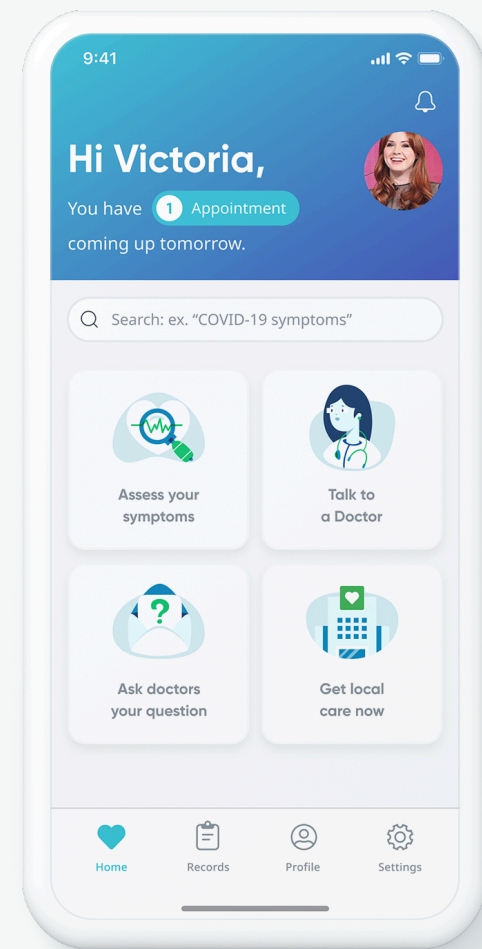
**Doctors**

**2,600,000+**  
unique answers

**2,800,000+**  
agree's



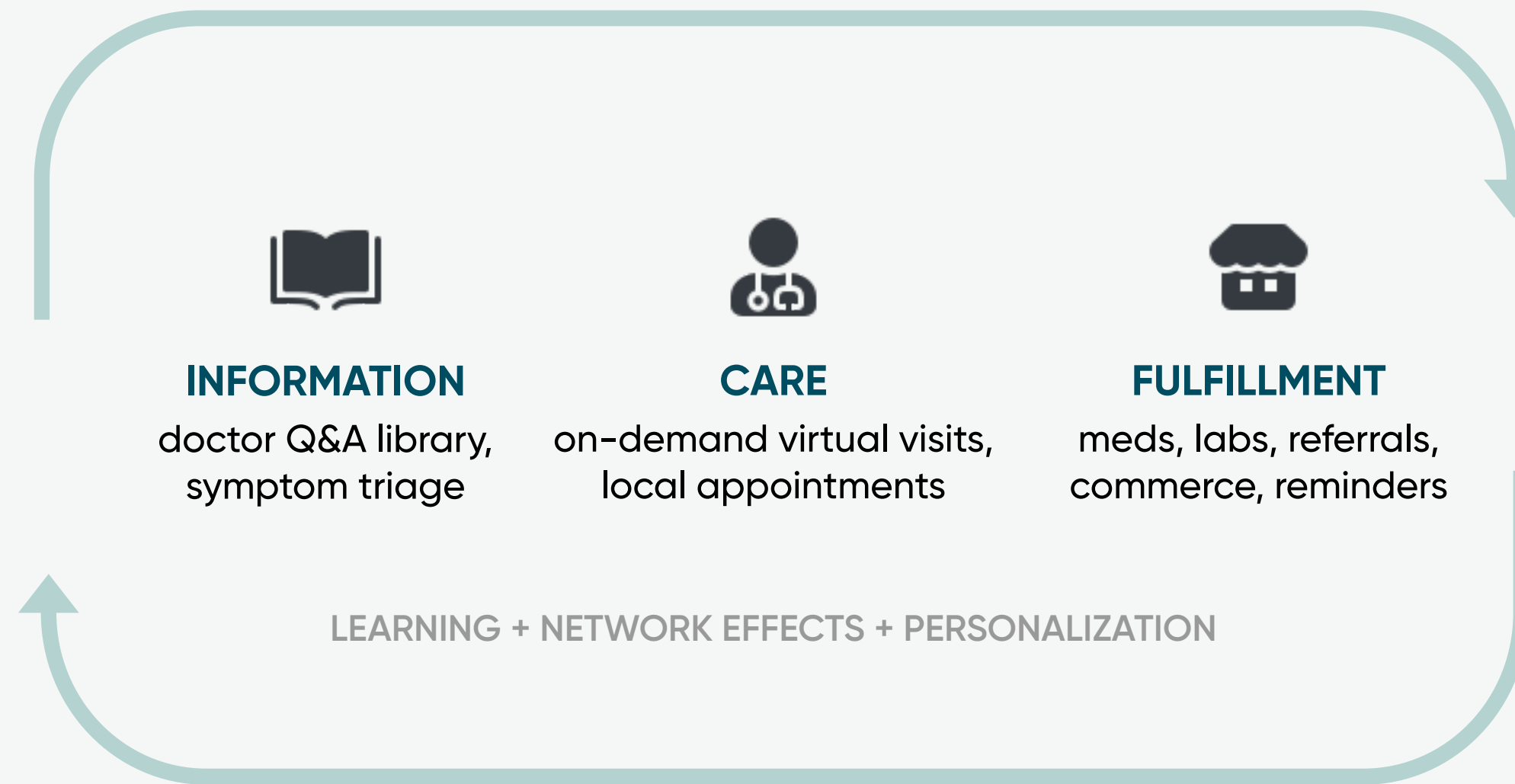
# END-TO-END VIRTUAL HEALTHCARE 10 YEARS IN THE MAKING



## Consumers

**8,000,000+**  
registered members

**65**  
Net Promoter Score

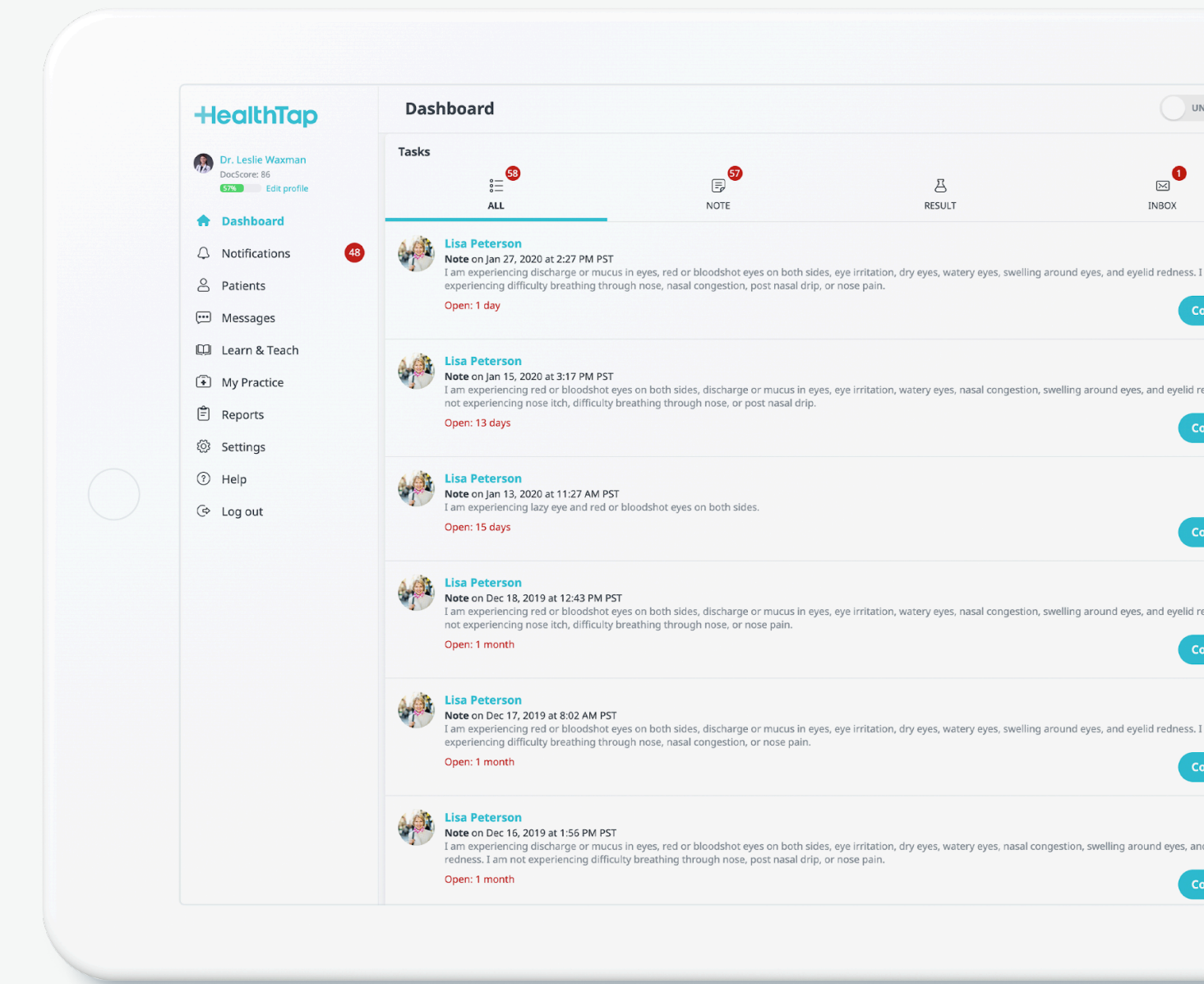


**INFORMATION**  
doctor Q&A library,  
symptom triage

**CARE**  
on-demand virtual visits,  
local appointments

**FULFILLMENT**  
meds, labs, referrals,  
commerce, reminders

LEARNING + NETWORK EFFECTS + PERSONALIZATION



## Doctors

**90,000+**  
U.S. doctors

**147**  
specialties

# SO WHAT'S ON PEOPLE'S MINDS?

Top three most asked about topics in Doctor Q&A

## SEPTEMBER 2019

1. Sexual health and STDs
2. Back pain
3. Sleep

## SEPTEMBER 2020

1. Sexual health and STDs
2. Head pain
3. Child health
4. Back pain
5. COVID-19

# WHY ARE THEY SEEING DOCTORS?

Most common reasons for a telemedicine visit:

## SEPTEMBER 2019

1. Urinary tract infections
2. Anxiety
3. Sinusitis
4. Allergies
5. Rhinitis (ear, nose & throat issues)

## SEPTEMBER 2020

1. COVID-19
2. Urinary Tract Infections
3. Anxiety
4. Sinusitis
5. Allergies



# DOCTOR'S ORDERS





# THE QUESTION OF MEDICAL RECORDS

**Medology**<sup>360</sup> [HOME](#) [OUR STORY](#) [OUR SERVICES](#)

January 18, 2016 - Uncategorized

**Why did Google Help outs for Health Fail and what's next for Real-Time Connection to Medical Experts?**

**MedCityNews**  
MEDCITY INFLUENCERS

**3 challenges Apple faces in path to widespread adoption of health record feature**

Tremendously useful (and widely used) tools have been built on iOS. Could one of the next ubiquitous applications be healthcare focused?

mobihealthnews TOPICS MAIN MENU

Asia Pacific EMEA Global Edition

**Official: Google Health shuts down because it couldn't scale adoption**

**ZDNet** VIDEOS WINDOWS 10 5G PRIME DAY CLOUD SMALL BUSINESS TV SECURITY MORE NEWSLETTERS ALL WRITERS

**Microsoft is closing its HealthVault patient-records service on November 20**

Microsoft's HealthVault personal-health-record service is closing on November 20 and any data left in it at that time will be deleted, Microsoft officials are telling users via e-mail.

in Search

**Why Google Helpouts Failed: A Provider's Perspective**

**MedCityNews**

**Microsoft HealthVault is officially shutting down in November**

While the end of HealthVault is admission of failure for the company's initial forays into health, Microsoft has refocused its efforts in the industry toward the enterprise market.

By KEVIN TRUONG

# ENTER ARTIFICIAL INTELLIGENCE (AI)

JAMA Network™

Biotech Innovations

February 11, 2020

**Artificial Intelligence Improves Breast Cancer Screening in Study**

**+HealthTap**

With AI support, doctors are 45% more likely to give an accurate diagnosis

diginomica

AI in healthcare - will it help or just make things worse?

HUB 

 **JOHNS HOPKINS**  
UNIVERSITY

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**Johns Hopkins study suggests medical errors are third-leading cause of death in U.S.**

**WHAT'S  
NEXT?**



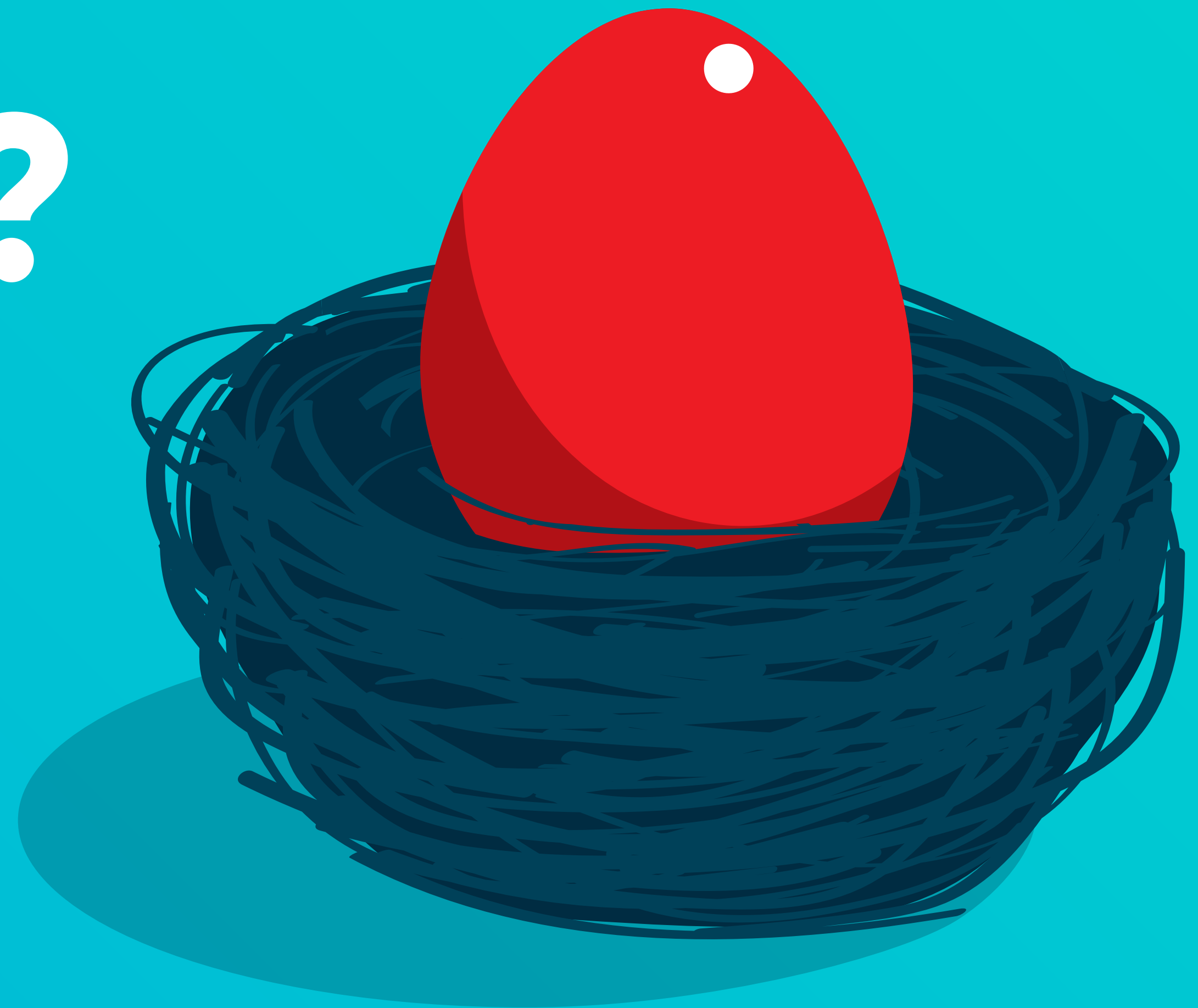
# **MASSIVE COMMERCIAL AND SOCIAL OPPORTUNITY**

**\$3.65 trillion per year on healthcare**

**Two thirds of ER visits are  
unnecessary or non-urgent**

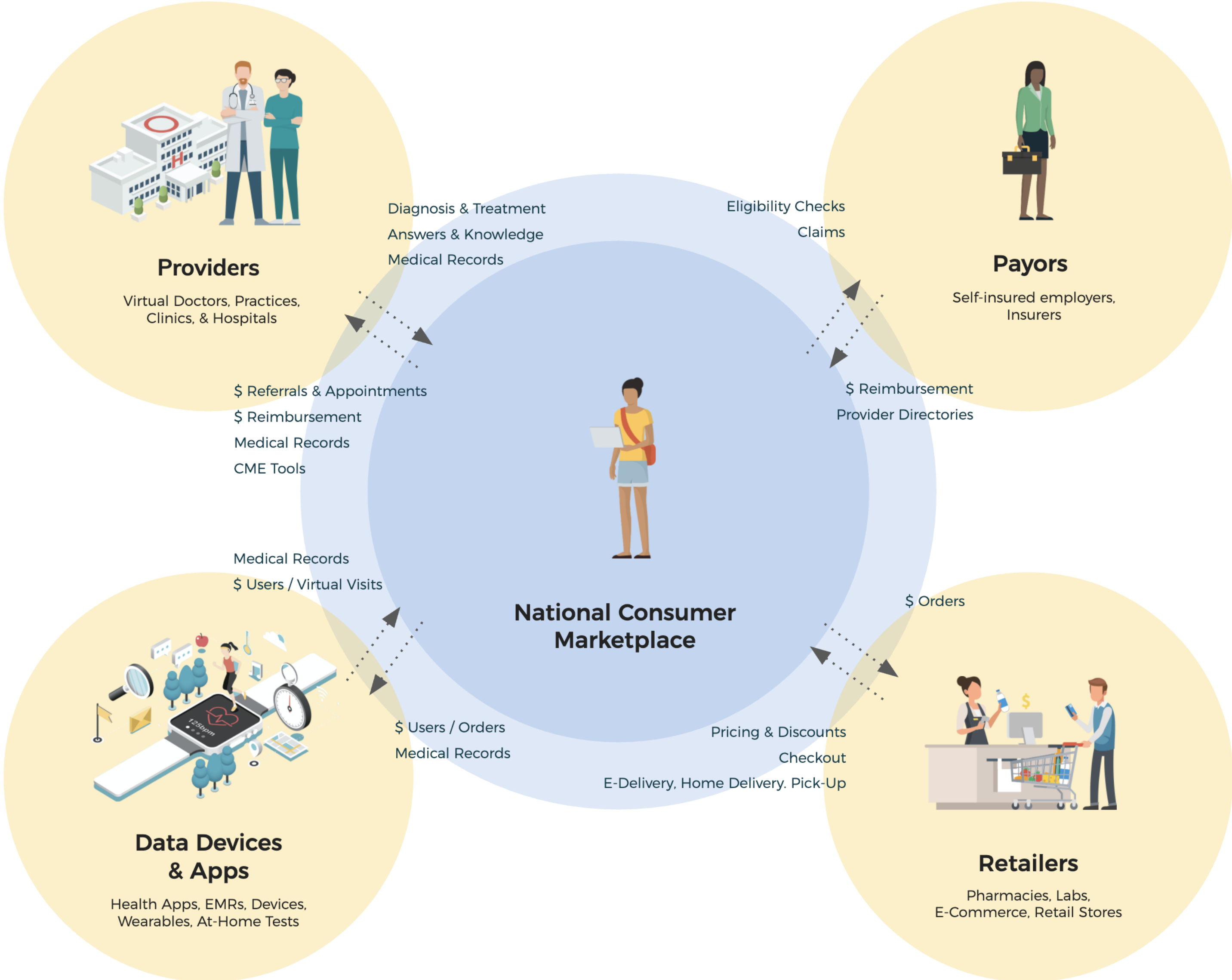
**~500 million primary care visits in  
the U.S. annually**

**SO WHAT'S  
TAKING  
SO LONG?**



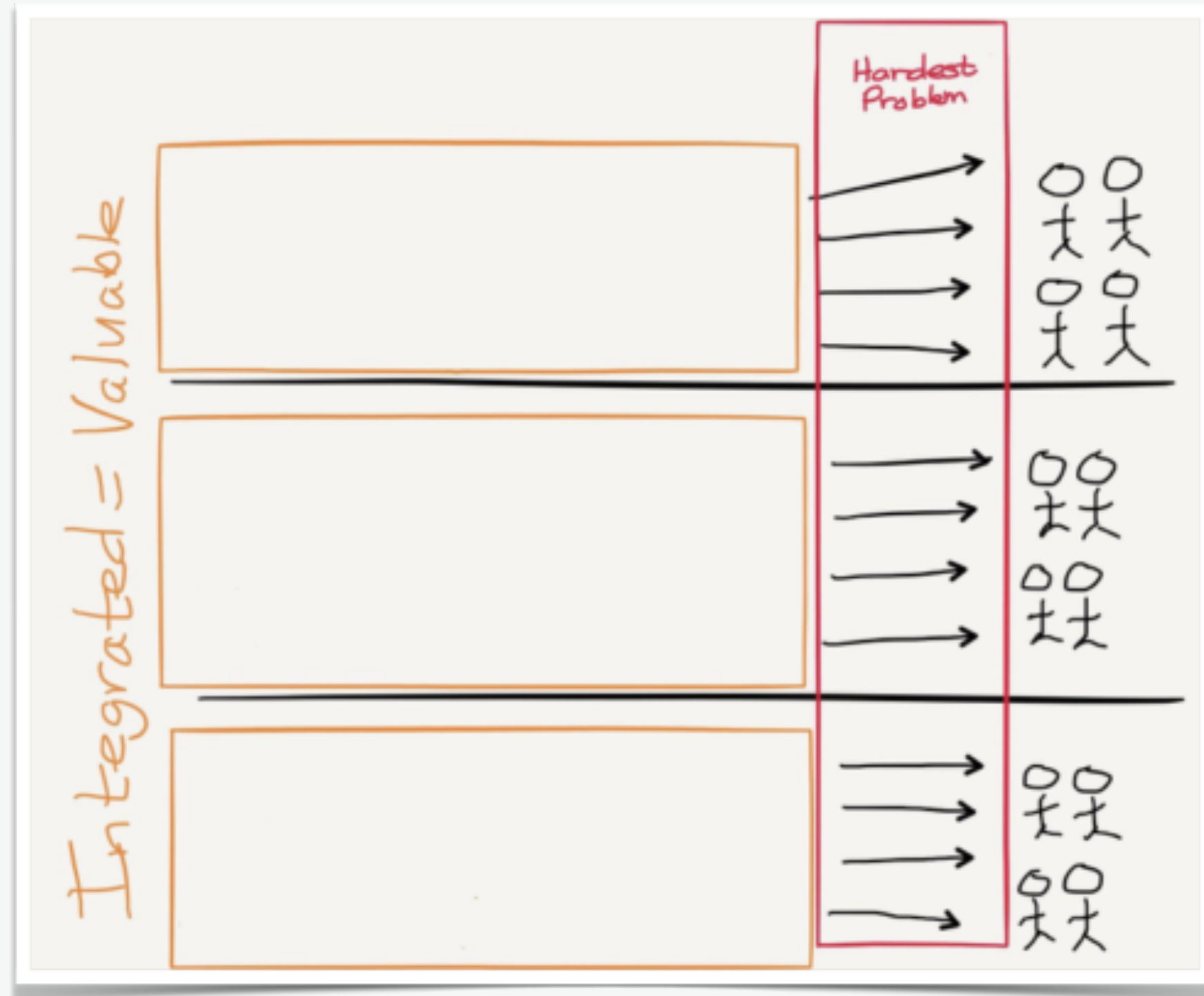


# THE VISION

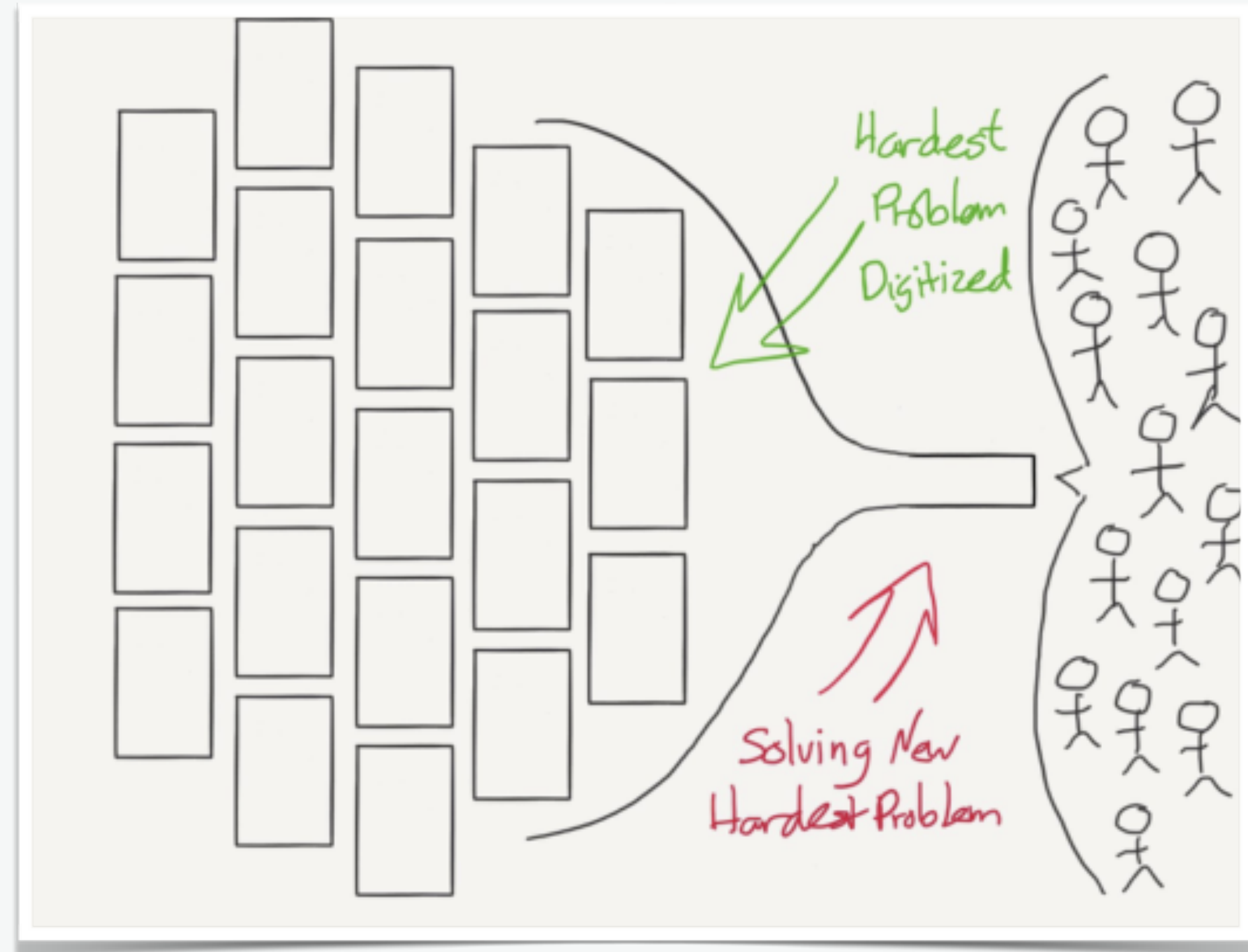


# AGGREGATION THEORY

Pre-Internet



Aggregated



# THE HEALTHCARE MARKETPLACE OF THE FUTURE

Amazon Flywheel  
*Understanding Amazon Virtuous Cycle Model*



# **THE WINNING FORMULA FOR HEALTHCARE**

- 1. Start with information**
- 2. An open marketplace**
- 3. A consumer brand**
- 4. Easy and compelling storage  
and access to medical records**
- 5. Everything is connected**



# NOBODY HAS IT ALL

## Consumer Retail

"We know consumers and we have consumers"



## Consumer Tech

"We know how to build consumer tech products they'll use & love"



## Enterprise SaaS

"We know how to build tech platforms to serve payors/providers"



## Enterprise Cloud

"Payors/providers are already using our platforms"



## Payors & Providers

"Access to cost-effective, quality care is literally our business"



## Digital Health Startups

"We're best-positioned to truly innovate & disrupt"



# SO WHAT DID WE LEARN?

- Pandemic catalyzed the “consumerization” of healthcare
- A “telemedicine app” is not enough for consumers
- We must think more holistically and seek more connected experiences



# WHAT DOES THIS MEAN FOR YOU?

**81%** of respondents that offer telehealth to employees would also be open to offering a solution to part-time workers and contractors

**75%** of respondents who currently provide telehealth to workers believe that people are more open to using telemedicine due to the pandemic, and that it will be a standard part of medical care moving forward.

Lack of speed and long wait times are the biggest pain point with current telemedicine providers, with **41%** wanting faster access and shorter wait times

# **3 EXPERT TIPS FOR EVALUATING "TELEMEDICINE"**

- 1. Compare apples to apples, especially for usage rates and pricing**
- 2. Dig into wait times at peak usage times**
- 3. Understand who is providing care and their credentials**



# **QUESTIONS TO ASK A TELEMEDICINE PROVIDER**

- 1. Availability**
- 2. Wait times**
- 3. Ongoing engagement and usefulness**
- 4. Features and services**
- 5. Pricing and ROI**



# +HealthTap

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**THANK YOU**