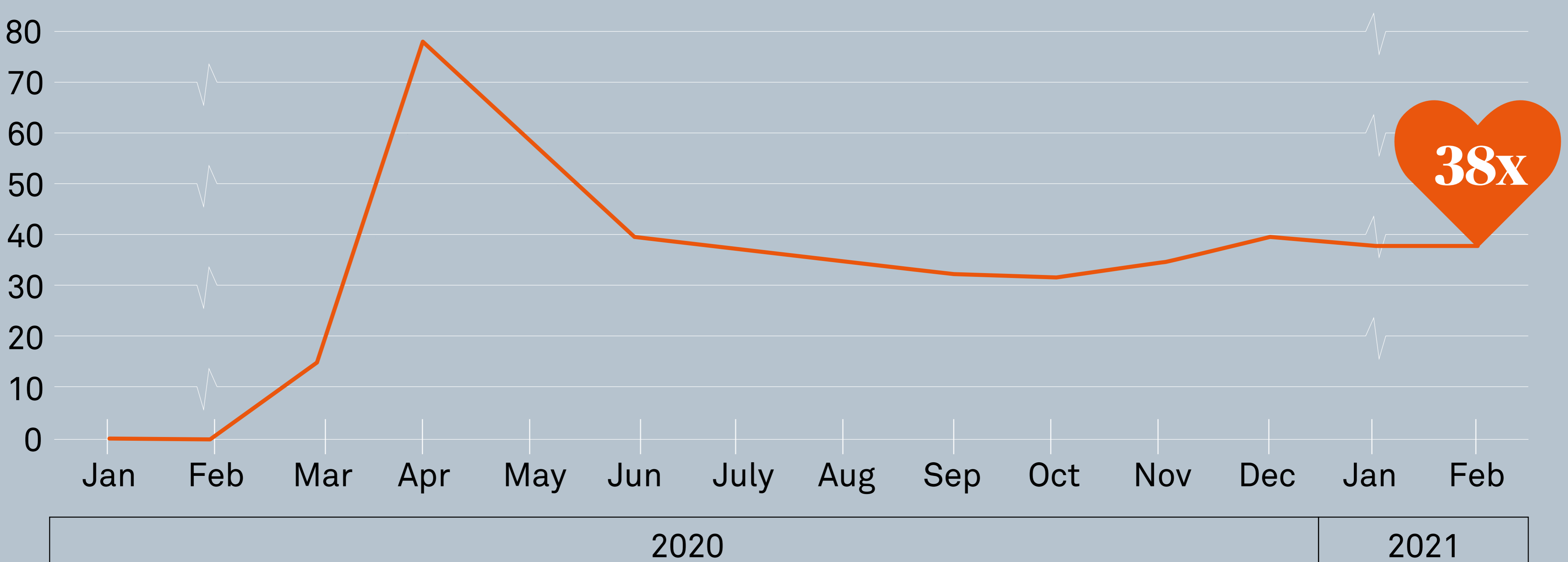




Future health care in a digital age

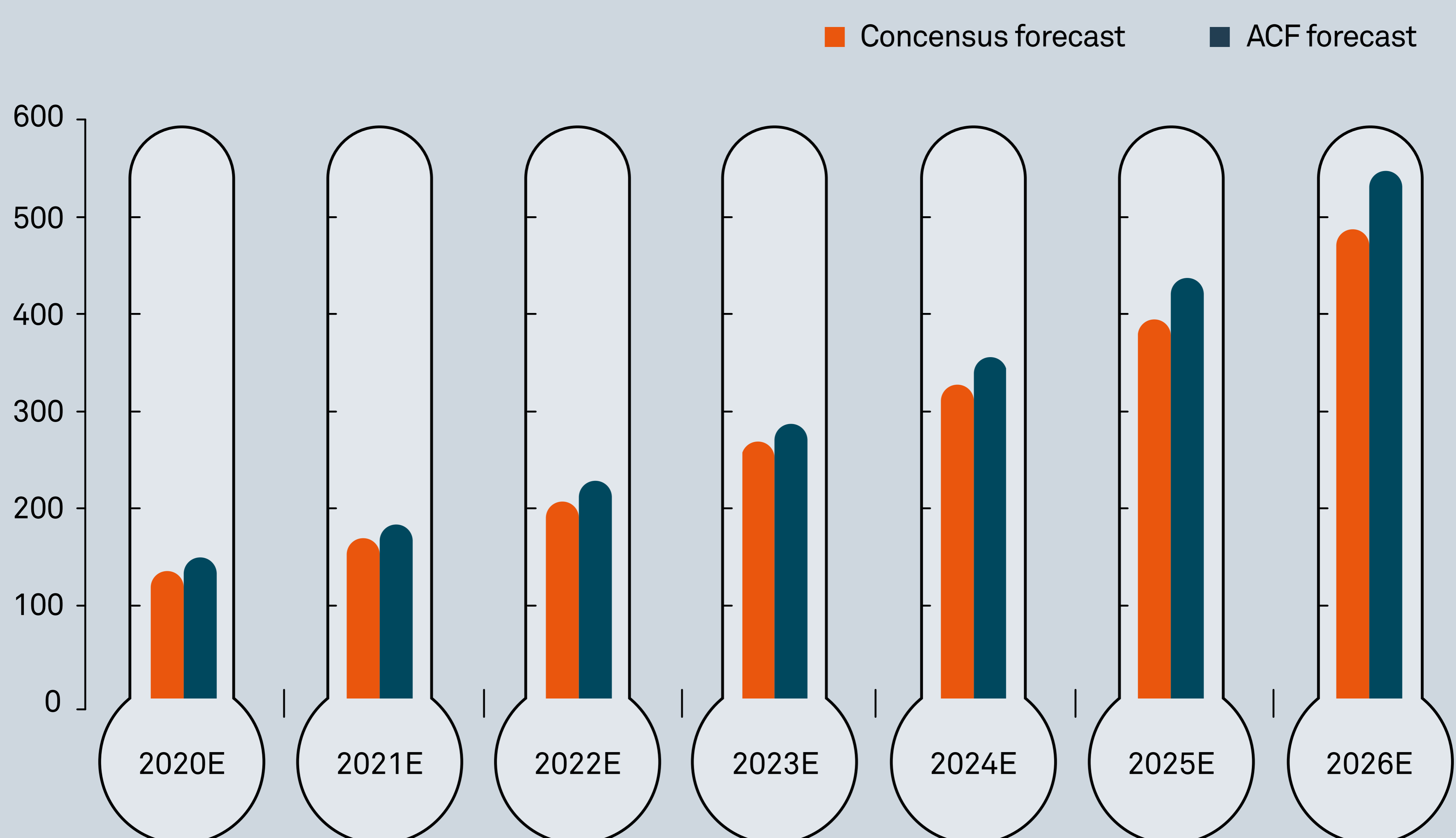
The Covid-19 pandemic prompted a major spike in digital and telehealth usage which has since stabilised...

TELEHEALTH CLAIMS VOLUMES, COMPARED TO PRE-COVID-19 LEVELS (FEBRUARY 2020=1)*



*Includes cardiology, dental/oral, dermatology, endocrinology, ENT medicine, gastroenterology, general medicine, general surgery, gynecology, hematology, infectious diseases, neonatal, nephrology, neurological medicine, neurosurgery, oncology, ophthalmology, orthopedic surgery, poisoning/drug tox./comp. of TX, psychiatry, pulmonary medicine, rheumatology, substance use disorder treatment, urology. Also includes only evaluation and management visits; excludes emergency department, hospital inpatient, and psychiatry inpatient claims; excludes certain low-volume specialties.
Source: Compile database; McKinsey analysis.

...yet long-term forecasts predict a steady shift away from hospital care to remote, digital health solutions such as telemedicine.



Sources: ACF Equity Research Estimates; Global Market Insights; Market Data Forecast; Grand View Research. 07 January 2021.

US \$250bn

of US health care spend alone could potentially be shifted to virtual or virtually enabled care, according to some forecasts.¹

US 220.94bn

forecast size of digital health market valuation by 2026.²

10.3%

average projected global health care spending as a share of gross domestic product (GDP) in 2021 and 2022.³



¹ McKinsey & Company, Telehealth: A quarter-trillion-dollar post-COVID-19 reality? 09 July 2021.

² Facts and factors. Global Report on Digital Health Market Size Valuation Will Reach to USD 220.94 Billion by 2026, According to Facts & Factors. 02 September 2021.

³ Forecasts. Deloitte Insights. 2021 global health care outlook.