

The Future of Virtual Health and Care

Driving access and equity through inclusive policies

Virtual health and care is the delivery of health and care services remotely through digital means and technologies.



Virtual health and care has grown globally since the COVID-19 pandemic began

76% of **patients** want virtual care visits to be a standard part of their care regimen¹

83% of **health and care providers** intend to continue using virtual delivery post the COVID-19 pandemic²

The global telehealth market is expected to grow at higher rates³



Expected average **compound annual growth** rate of the global telemedicine market between 2019-2025

Explosive growth in virtual health and care solutions

Colombia: 1Doc3
700% increase in use between Dec 2019 and Jun 2020⁴

UK: NHS Pathways
1 million additional virtual doctor appointments each week in 2021 vs 2020⁵

Global: Ada Health
6 million users joined in 2020 alone vs 5 million in the previous eight years combined⁶

Nigeria: CureCompanion
1 200% increase in use between Sep 2019 and Sep 2020⁷

Careful policies are needed to overcome digital divides to ensure virtual health and care drives health equity

Age

Older people are less likely to use the internet⁸

UK: **Training programs** are helping older physicians deliver virtual health and care services⁹

Income-level

Low-income groups have lower internet access rates and speeds¹⁰

Chile: AI-enabled devices for primary care are capable of **being operated offline**¹¹

Rural-urban

Rural areas have less connectivity compared to urban areas¹²

Sri Lanka: Targeted rural outreach **uses SMS and calls**¹³

Gender

In general, women have lower levels of adoption of the internet and digital technologies compared to men¹⁴

Ghana: **Counseling and education** to support women using virtual health and care¹⁵

Disability

Many people with disabilities feel excluded from digital society due to lack of accessible solutions¹⁶

USA: Telehealth program for people with **intellectual disabilities**¹⁷

UAE: Specialized services such as **electronic nursing surveillance and home medical consultations** for persons with disabilities¹⁸

Social group

Minority groups have lower access to internet and virtual health and care¹⁹

USA: **Text and voice messaging** seeks to lower racial barriers to access health and care²⁰

A roadmap for maturity in virtual health and care

Policymakers across the globe have an opportunity to maximize the opportunities offered by virtual health and care. But they need to do this in a way that builds equitable access to health.

Our new framework for maturity in virtual health and care consists of the six policy pillars to build the hybrid physical-virtual health systems that countries need to overcome health equity and access challenges.

Six key policy pillars for a virtual health and care policy maturity framework

Governance and regulatory

Provide essential administrative and regulatory structure through strategies, plans, and guidelines.

Policy elements: governance, regulation, licensing, liability, quality assurance

Data and technology

Ensure the flow of data by blending hardware with evolving software and delivery standards.

Policy elements: infrastructure, data governance, interoperability

People and workforce

Equip different stakeholders with the required know-how through trainings, continuing education, skill upgrades, and competency building.

Policy element: digital skills building

Design and processes

Encourage user-friendly solutions by focusing on the individual through research and development and effective use of data in decision making.

Policy elements: human- and equity-centric, innovation, health outcomes

Business models

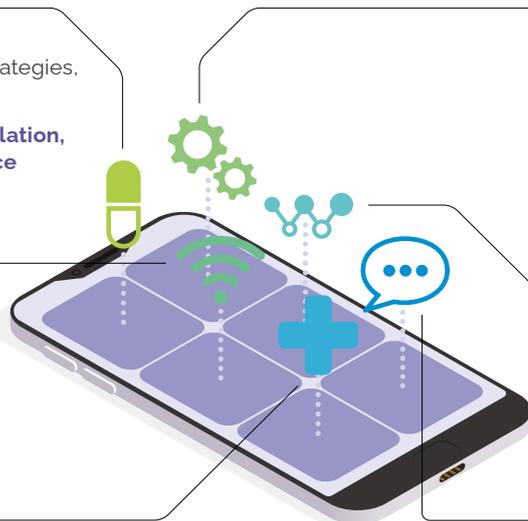
Supply financing and coverage through different funding sources, sustainable investments, and innovative pricing models.

Policy elements: financing, reimbursement

Partners and stakeholders

Bring together different players in the ecosystem through partnerships and teamwork.

Policy element: collaboration



About the Working Group

The 2021 Broadband Commission for Sustainable Development Working Group on Virtual Health and Care, co-chaired by the World Health Organization (WHO) and the Novartis Foundation, was convened in response to the changes in health and care delivery driven by the COVID-19 pandemic. This new report builds on insights from previous working group reports, and seeks to prepare

stakeholders to capitalize on the new reality. Rather than focus on specific technology innovations, the report aims to develop policy recommendations to promote the global use and integration of virtual health and care. The report places special emphasis on policy actions that promote access and enhance health and care equity through virtual means.



BBCom website: broadbandcommission.org/working-groups/virtual-health-and-care

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