State of Delaware

January 2020

Mike Russo, Director of National Sales, Employer Solutions
Today's agenda
Introduction to American Well

**Our Mission:** To connect and enable providers, insurers, patients, and innovators to deliver greater access to more affordable, higher quality care

**Our Vision:** Digital care delivery will transform healthcare
Telehealth Is Becoming Healthcare (And Vice Versa)

Here’s What Your Future Doctor Visits Could Look Like

"Tomorrow’s office visit will increasingly take place everywhere but the office."

- Dr. Eric Topol
  May 2nd 2017

Beyond urgent care

PROJECTED NUMBER OF OFFICE VISITS: 2015 - 2025

Health systems use telehealth across the spectrum of care

<table>
<thead>
<tr>
<th>Patient &amp; Provider</th>
<th>Provider &amp; Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>On Demand Telehealth</strong></td>
<td><strong>Follow-Up Care</strong></td>
</tr>
<tr>
<td>Typically <strong>On-demand primary care</strong></td>
<td>Typically <strong>Scheduled visits</strong> with own Patients</td>
</tr>
<tr>
<td>Urgent Care, Pediatrics, Behavioral Health Kiosks, Employers, Retail Locations</td>
<td>Post-Discharge Follow-Up, Cancer Care Chronic Care, Medication Management</td>
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<tr>
<td><strong>Sub-Acute Telehealth</strong></td>
<td><strong>Acute Care Telehealth</strong></td>
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<tr>
<td>Typically <strong>Acute Care Consults</strong></td>
<td>Typically <strong>Acute Care Consults</strong></td>
</tr>
<tr>
<td>Presenter to provider in schools, SNFs, hospital rooms</td>
<td>Provider to provider in tele-stroke, tele-ICU</td>
</tr>
</tbody>
</table>
Telehealth applications built for and with our clients

- Urgent and Primary Care
- Follow Up Care
- Health and Wellness
- Clinic and Retail Care
- Cancer Care
- Student Health
- Concierge Advisory
- Nutrition and Diet
- Women’s Health
- Specialty Programs
- ER Triage
- Behavioral Health
- Employee Health
- Pre and Post Surgery
- Pediatrics and New Moms
A delightful consumer experience on all form factors

On The Go

At Home

At Work

Phone
We are constantly working to better understand the industry

Telehealth Index: 2019 Consumer Survey

2000+ consumers across the U.S.  |  Fielded in December 2018  |  Nationally projectable survey
Most consumers are willing to use telehealth

How willing would you be to have an online video visit with a doctor?

- Very/Somewhat Willing: 66%
- Not At All/Not Very Willing: 34%

Willingness to use telehealth by age group:

- 18-34: 74%
- 35-44: 72%
- 45-54: 67%
- 55-64: 61%
- 65+: 52%

Base: All respondents (n=2,001)
Consumers want telehealth for a variety of use cases

- Prescription Renewals
- Chronic Disease Management
- Surgery and inpatient follow-up
- Urgent Care
- Behavioral Health

Base: Senior respondents who are “Very” or “Somewhat” willing to have an online doctor visit (n=212)
Telehealth usage is high in rural parts of the country

Consumers who have used telehealth by region

Of the 8% of consumers who have used telehealth, here is the breakdown of where they are located

Health professional Shortage Areas

Source: Telehealth Index: 2019 Consumer Survey
Source: Rural Health Information Hub
Access is a problem: some consumers are delaying needed care

Have you delayed talking to a doctor or nurse?

- Yes: 30%
- No: 70%

If yes, how serious was the health problem?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Very serious</th>
<th>Somewhat serious</th>
<th>Not Very Serious</th>
<th>Not at all serious</th>
<th>Unsure</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>11%</td>
<td>12%</td>
<td>15%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>35-44</td>
<td>29%</td>
<td>30%</td>
<td>34%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>45-54</td>
<td>30%</td>
<td>26%</td>
<td>12%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>55-64</td>
<td>11%</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>65+</td>
<td>7%</td>
<td>7%</td>
<td>15%</td>
<td>12%</td>
<td>14%</td>
</tr>
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Base: All respondents (n=2,001)
Telehealth can help consumers who are delaying needed care

Why did you delay talking to a doctor or nurse about a health problem?

- Thought The Problem Would Go Away
  - 65+: 57%
  - 55 - 64: 46%
  - 45 - 54: 41%
  - 35 - 44: 40%
  - 18 - 34: 40%

- Takes Too Long To See Doctor
  - 65+: 30%
  - 55 - 64: 28%
  - 45 - 54: 29%
  - 35 - 44: 40%
  - 18 - 34: 39%

- Cost
  - 65+: 24%
  - 55 - 64: 29%
  - 45 - 54: 17%
  - 35 - 44: 29%
  - 18 - 34: 40%

Base: Have Delayed Seeing Doctor or Nurse about a Health Problem (n=1,417)
Top reasons for consumer willingness to use telehealth

Base: Respondents who are "Very" or "Somewhat" willing to have an online doctor visit (n=1,317)
Our Physician Survey:

- 800 physicians across the U.S.
- Fielded in December 2018
Who we surveyed

Of the 800 physicians surveyed:

- **62.5%** are primary care physicians
- **37.5%** are specialists

Specialties include:

- Anesthesiology
- Cardiology
- Dermatology
- Emergency medicine
- Endocrinology
- Gastroenterology
- Infectious diseases
- Internal medicine
- Neurology
- Obstetrics & gynecology
- Oncology
- Ophthalmology
- Pediatrics – primary care
- Pediatrics – subspecialty
- Psychiatry
- Pulmonology
- Radiology
- Rheumatology
- Surgery
- Urology
Key Findings
Physicians are more willing to try telehealth

Physician Willingness to Have a Video Visit

<table>
<thead>
<tr>
<th>2015</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Willing</td>
<td>57%</td>
</tr>
<tr>
<td>Unsure</td>
<td>31%</td>
</tr>
<tr>
<td>Not Willing</td>
<td>12%</td>
</tr>
</tbody>
</table>

Top Reasons:

- Increase access to my patients
- Flexible work-life balance
- Attract and retain new patients
- Improve outcomes for my patients
- To be on the leading edge of medicine
Age has an impact on willingness

Physician Willingness to Have a Video Visit by Age:

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Willing</th>
<th>Unsure</th>
<th>Not Willing</th>
</tr>
</thead>
<tbody>
<tr>
<td>55+</td>
<td>60%</td>
<td>27%</td>
<td>14%</td>
</tr>
<tr>
<td>45-54</td>
<td>70%</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td>35-44</td>
<td>77%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>25-34</td>
<td>74%</td>
<td>15%</td>
<td>11%</td>
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Adoption of telehealth has increased...significantly

Have you used video visits to see patients before?

- No
- Yes

2015: 95% No, 5% Yes

2019: 78% No, 22% Yes
Half of physicians not using telehealth now expect to in next 3 years

Growth of Physician Use of Telehealth

2019

22% USING TELEHEALTH TODAY
78% NOT USING TELEHEALTH TODAY

IN THE NEXT 3 YEARS

17% VERY LIKELY
33% LIKELY
24% NEITHER LIKELY NOR UNLIKELY
15% UNLIKELY
11% VERY UNLIKELY
Physician use of telehealth is at an inflection point

When applied to the 900,000 active physicians:

- Providers currently using telehealth: 970,000 (number of professionally active physicians according to Kaiser) X 22% (percent of physicians who have used telehealth) = 213,400.

- Providers using telehealth in 3 years (low estimate): 970,000 – 213,400 = 756,000 (number of physicians not currently using telehealth) 756,000 X 17% (percent of physicians very likely to start using telehealth in next three years) = 128,520 (physicians very likely to starting using telehealth in next three years) + 213,400 (physicians who have used telehealth) = 341,920

- Providers using telehealth in 3 years (high estimate): 970,000 – 213,400 = 756,000 (number of physicians not currently using telehealth) 756,000 X 50% (percent of physicians very likely or likely to start using telehealth in next three years) = 378,000 (physicians likely to starting using telehealth in next three years) + 213,400 (physicians who have used telehealth) = 591,400

Numbers were calculated in the following way:
Of physicians using telehealth, half will use it frequently by 2022.
Physicians who have used telehealth see its value

Of the Physicians Who Have Used Telehealth:

- 93% said it improves patients' access to care
- 77% said it contributes to a more efficient use of time for doctor and patient
- 71% said it helps reduce healthcare costs
- 71% said it enables high-quality communication with patients
- 60% said it enhances the doctor-patient relationship
Client example: reduced healthcare costs

Not-for-profit health system based in Salt Lake City, Utah

Integrated health plan (SelectHealth)

Conducted a virtual visit claims study in 2018

Total Claim Cost Per Episode (21 days)

- Virtual Care: $429
- Urgent Care: $661
- PCP: $707
- Emergency Room: $3,403
- Do Nothing: $0

Savings per claim: $367

Claims: 5,000

Total Claims Reduction: $1,835K

Where people would have gone for care

- 58% Emergency Room
- 25% Virtual Care
- 11% Urgent Care
- 4% PCP
- 2% Do Nothing
Overview:
• Children’s health system provides care in six states
• Cares for more than 400,000 patients annually
• Launched direct-to-consumer telehealth service, CareConnect, in November 2015

Results:
• Enrolled more than 17,000 patients in CareConnect
• 30% of patients have had a visit
• Top conditions treated: Rashes, fever, cough, vomiting, ear pain

Families rate CareConnect

4.7 OUT OF 5 STARS

97%

Of families are “highly satisfied” with CareConnect
Transforming from urgent care focused to a health care mall in the cloud

- Therapists & Psychologists
- Doctors
- Psychiatrists
- Nutritionist
- Health coach
- Lactation consultant

Amwell
Your Healthcare Starts Here

Urgent Care

Board-certified doctors are available for on-demand video visits 24/7 to help you feel better faster.

Commonly Treated Conditions:
- Cough & Cold
- Flu
- Pink Eye
- Sinus Infections
- Strep Throat
- UTI

Follow-up care and outpatient services by the nation’s leading hospitals and clinics.

Programs for a healthier life like nutrition, weight loss, breastfeeding support, and more.
The features of Amwell

- Live, on-demand video doctor visits 24x7/365 or scheduled visits
- Four modalities to access care; smartphone, tablet or computer, kiosks
- Available in all states with an average wait time of 10 minutes
- Integration with Health Plans
- Choice of board certified, network doctors
- Secure and private, HIPAA compliant video visit
- E-prescribing to your pharmacy of choice*
Commonly Treated Medical Conditions

- Abrasions, minor wounds
- Acne
- Anxiety
- Asthma
- Allergies/allergic rhinitis
- Back pain
- Cough/Cold
- Depression
- Diabetes/hypoglycemia
- Diarrhea
- Ear pain
- Fever
- Headache/migraine
- Hypertension
- Incontinence

- Incontinence
- Influenza/flu
- Insomnia
- Nausea/Vomiting
- Obesity
- Pinkeye and other eye infections
- Rashes/skin disturbances
- Sinus infection
- Smoking cessation
- Sore throat/pharyngitis
- Sprains and strains
- Urinary tract infection
The telehealth kiosk: an introduction

• Built as a point-of-care health station
  • Facilitates clinically informed visits, for patients and providers

• Delightful patient experience
  • Touch interface
  • Natural workflow progression
  • Integrated tools and peripherals

• National telehealth network under the hood
  • Medical, nutrition, behavioral health
  • Incorporate your own providers—or use ours!

• Professional manufacturing, install & support
  • UL certified for safety and compliance
Online Care Group
Covering 50 states

- National Medical Group – telehealth only
- Uniquely trained and experienced in telehealth
- Board-certified, multi-state licensed physicians
- Multi-disciplinary including urgent care, behavioral health, nutritionists and lactation consultants
- Patient choice of provider
- 24/7/365
- 5-10 minutes average wait time for Urgent Care
- Network Operations Center supports quality assurance, credentialing, and scheduling
- Mixed network compatibility works in conjunction with your clinical initiatives and providers
- NCQA-Certified (100% audit), FSMB Compliant, First to be ATA accredited
The future is already here — it's just not very evenly distributed.

WILLIAM GIBSON
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