



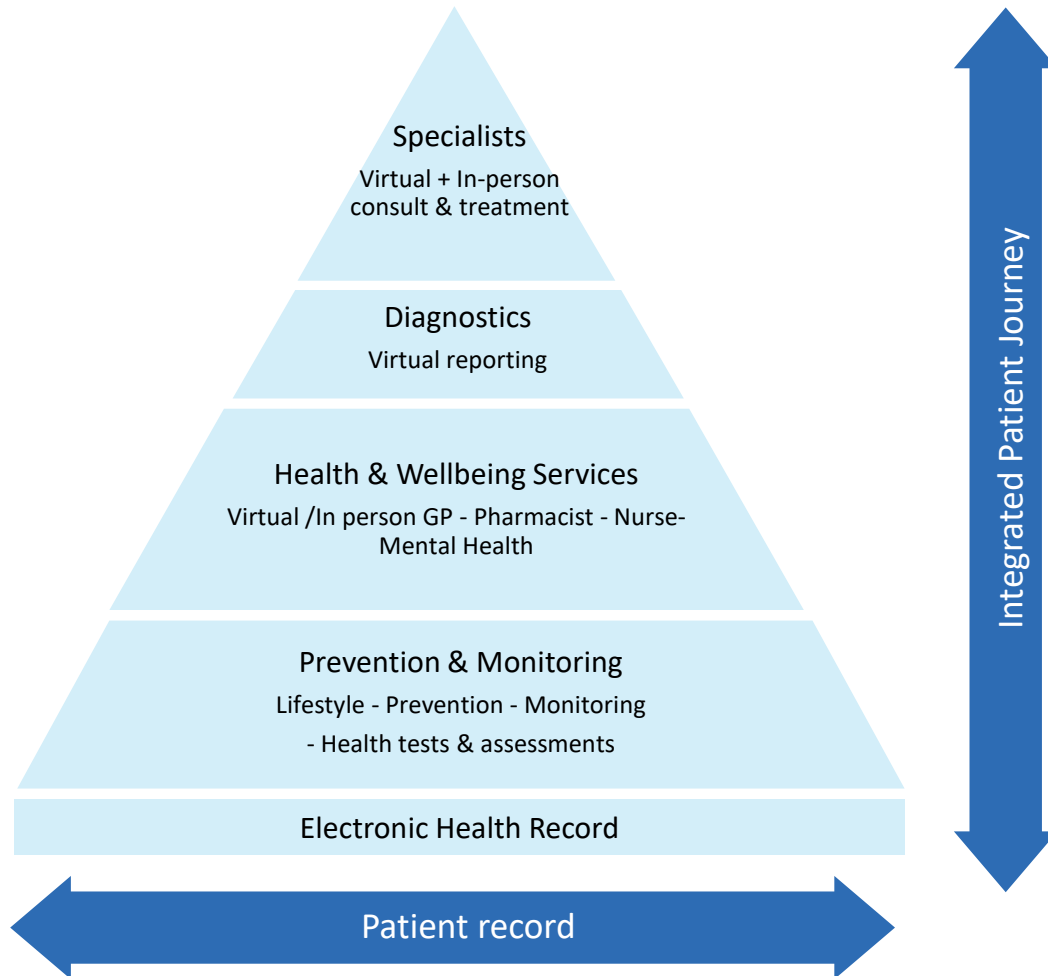
Doctor Care Anywhere

25 November 2020



An introduction to Doctor Care Anywhere

The Company was founded in 2013 to specifically address the fragmentation found in health systems around the world that contributes to what DCA believes to be unnecessary interventions, increased costs and poor patient outcomes.



Since 2015, we have become one of the UK's leading digital health providers

↑ 20,000
Monthly consultations

Our Internet Hospital is unique in the market and is the first step in our vision to build a value-based health care system

↑ 340k
activated lives

Launched joint venture with AXA, to transform patient care under the Doctor@Hand with Diagnostics brand

↑ 2m
eligible lives

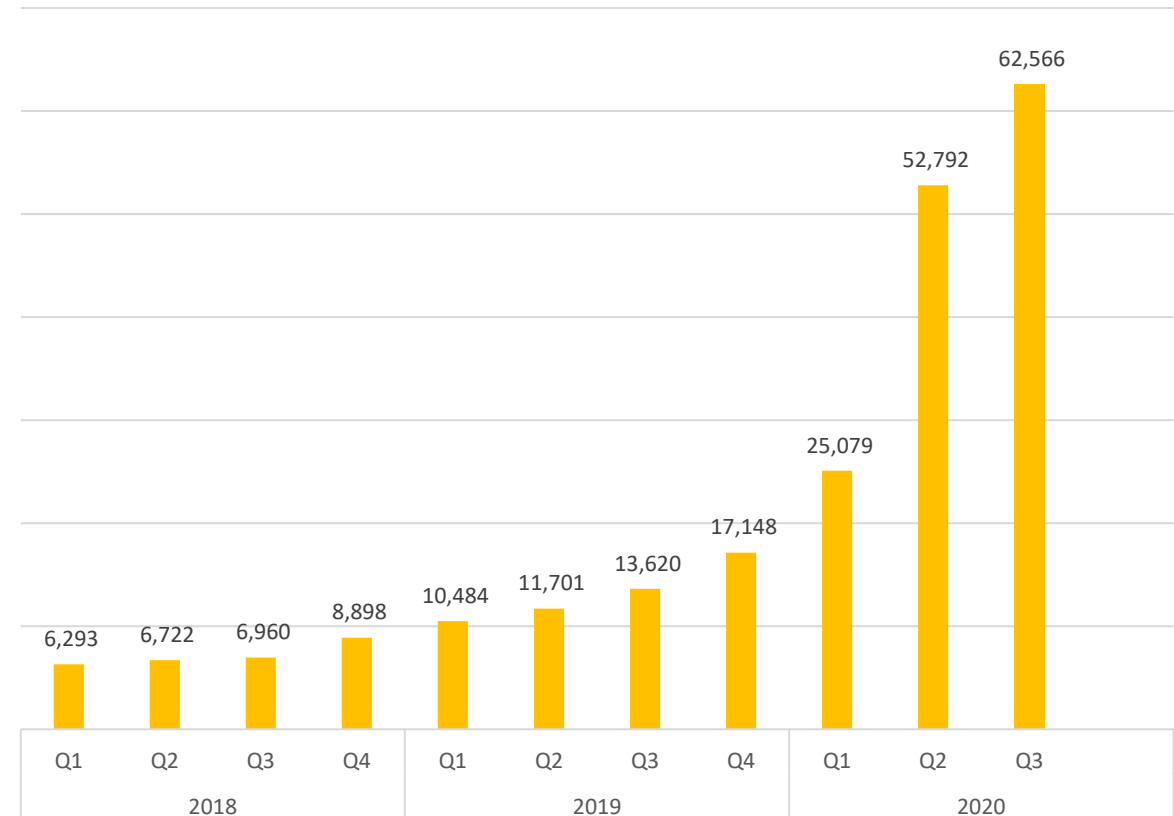
COVID-19 has had a huge impact on the adoption of telehealth



- It has changed patients' and providers' perspective on the value of digital tools
- The 'digital front door' is quickly becoming 'the new normal' for patients to access clinical services
- There is a growing backlog of patients needing care in the NHS
- PMI providers are under increased scrutiny to deliver value in an environment where members cannot easily claim
- There is growing demand for mental health services

Consultations by quarter, 2018 – 2020 YTD

- Since lockdown measures were implemented earlier in the year, our monthly consultation rates have grown exponentially.
- Consultations in September alone represented 385% growth YoY.



Our views on winners and losers going forward



- Who will have the best connection with the patient along the patient journey?
- Huge number of players operating in this space; fast-growing telemedicine, hospitals, insurers, Big Tech etc. – but who will win?
- From health and wellbeing services to ongoing patient needs such as chronic care management, who is best placed to meet patient demand?
- Will payment models change to reflect the different health needs in today's world?



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