Meeting Demand for Telehealth
Introduction

Telehealth, also referred to as virtual healthcare, is remote medical care delivered using technology such as videoconferencing, audio, or chat, is yet another alternative option for patients besides seeing an in-office physician or a hospital. Proponents believe that virtual care can enhance the patient experience, reduce costs, and increase access to medical care, especially in remote rural areas where there are fewer physicians and hospitals.

Despite the opportunity, many questions remain, including whether people know about telehealth, how they are using it, and how it can better serve people. To answer these questions, Civis Analytics fielded an online survey of 2,840 US adults in June 2019 to better understand the emerging market of patients who are embracing virtual care and what motivates their interest.

Findings

Adoption of virtual healthcare is still in its early stages, but there is high interest.

Only 9% of respondents have used telehealth services. Users are more likely to be males, between 35 and 49 years old, and residents of rural communities (see Figure 1). While overall utilization has been low, 68% of those who have not used live video for medical consultation would be interested in doing so. To date, telehealth is most frequently used for consultations related to mild conditions such as acid reflux, pink eye, and the flu, followed by prescription refills.

![Figure 1. Telehealth patients tend to be male, younger and reside in rural areas of the country](image-url)
Seeing a virtual medical provider is especially attractive to patients seeking mental health services.

Fifty-seven percent of the people who plan to seek mental health services expressed interest in doing so via videoconferencing or chat (Figure 2). Mental health was the only condition for which the majority of patients seeking these services were likely to prefer using virtual care over seeing a traditional provider. However, prescription refills and sexual health consultations also garnered interest from more than 40% of respondents.

![](image)

Figure 2. Patients are especially interested in receiving mental health services from a provider virtually

Patients are most likely to switch to a provider that treats patients virtually when they need services for sexual health, followed by mental health services, and prescription refills.

Survey respondents interested in using telehealth were also asked how likely they would be to switch from a traditional in-office provider to this type of service. Three out of four people interested in virtual sexual health care said they would make the switch. However, other services were also likely to drive interest in switching from in-office care to virtual care. Even for follow-up care after a hospital stay, which garnered the least interest, almost half of respondents said that they were likely to try this alternative.

![](image)

Figure 4. Most people interested in using virtual care said they were likely to switch away from their traditional provider for sexual health consultations
Recommendations

As trends in healthcare consumerism evolve, many innovative providers are rising to the occasion by challenging delivery models that have long been the established status quo. Patients want the convenience of being seen on short notice or as a walk-in patient, all at a potentially lower price. Virtual care promises to offer them the ability to achieve this, from the comfort of wherever they’re physically located.

Civis offers these recommendations to healthcare solutions providers seeking to drive adoption of virtual consultations:

- **Highlight usage for mental and sexual health issues.**
  Mental health services, delivered remotely, are the most in-demand treatment. Both prospective and current patients show particular interest in switching doctors to receive virtual care for sexual and mental health. Patients’ strong interest in addressing these concerns virtually likely comes from the stigma and emotional burdens associated with them, coupled with the lack of mental health providers across the country, but especially in hard-to-reach geographic areas.

- **Focus investments where there are high levels of patient interest.**
  While telehealth has substantially grown in the past decade, overall utilization is still low. This means there is a significant untapped demand for a variety of virtual care medical services that is not currently met, and providers who can understand this emerging segment of early-adopter patients—who they are, what they want, and how they respond to outreach messages—will be ahead in the race to capture this market. An early and strong understanding of this population is especially critical, as the costs to providers of implementing telehealth technology and operations are substantial.

Three out of four people who were interested in seeing a provider for sexual health services said they would consider switching from a traditional provider to one they could see virtually.

Providers who can understand these early adopters will be ahead in the race to capture this emerging market.
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