Consumer Perspectives on Telehealth

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About Change Healthcare

Change Healthcare is a leading independent healthcare technology company, focused on insights, innovation and accelerating the transformation of healthcare to inspire a better healthcare system. Our interconnected position at the center of healthcare allows us enable greater collaboration on the path to value-based and consumer-centric care. Our powerful platform fuels data and analytic solutions to connect payers and providers and enable more accurate financial transactions, operational efficiencies and improved clinical decision making. It's how we are working to make the healthcare experience better for everyone.

While we have been leveraging digital technologies to transform the healthcare industry for years, the COVID-19 pandemic has accelerated their implementation with strong support of U.S. consumers who have long demanded an easier way to access and pay for care. In the span of just weeks, healthcare became almost entirely virtual, driving a massive increase in telehealth services across emergency, primary and specialty care.

Our culture of innovation and agility allowed Change Healthcare to quickly pivot and ensure business continuity amid an unprecedented global pandemic. In record time, we implemented a robust digital infrastructure to meet the needs of our customers and partners while also keeping our employees safe and embracing a virtual work force. In fact, we added three new telehealth platforms to our network since March and as a result, telehealth enrollment has gone up by 270%. Based upon our experience and this research, the rapid and sweeping adoption of telehealth presents opportunities to expand access to care past traditional healthcare delivery – now and in the future.

The Accelerate Health 2020 Consumer Telehealth explores consumer perception on telehealth at a pivotal time – following the first encounter for a majority of patients. These first experiences can influence the future utilization of telehealth and notably, this research found that while only 40% of respondents have used any form of telehealth in the past six months, 77% of are willing to use some form of telehealth in the future.

These insights help understand where consumers stand on key issues related to healthcare delivery and increasing digital technologies. We hope you find this report interesting and useful in determining how to move forward together to transform the healthcare system for the better.

Respondent Summary

The Accelerate Health 2020 Consumer Telehealth survey was fielded for 10 days during September 2020. The sample includes 2,052 individual consumers, balanced to the U.S. population, and reinforces two key points:

1. Most people are insured and therefore do not pay the full cost of their care out-of-pocket. This will influence their thoughts on cost. Behavioral health services may be a notable exception with limited insurance reimbursement.

2. Most older respondents (Generation X and Baby Boomer) have established relationships with primary care practices and specialists. Younger respondents are more likely to seek emergency or urgent care.

Defining Telehealth for Consumers

Video Visit

…is a **live virtual visit** with a healthcare provider using real-time video on a mobile device or computer / lap. This visit is only with the provider and DOES NOT INCLUDE things like lab work, tests, etc., that cannot be done virtually.

Messages

…may include text messages / photos / etc., but **not a live visit**, between the healthcare provider and the patient, often using a secure app the provider's office requested you download to a mobile device. These messages serve as a visit when there has been a payment made to the provider's office, possibly an insurance co-pay, to message with the healthcare provider.

Phone Call

…visit with a healthcare provider is **on the phone and audio only**.

Office

…visits in person with the provider **at their office.**

Executive Summary

The future of healthcare is virtual. As the data included in this analysis show, the COVID-19 pandemic has succeeded where earlier initiatives have failed: to get a majority of healthcare users try a virtual visit of some kind. Across all specialties, everyone has dipped their toe into the telehealth pool. Along with changing attitudes to working from home and virtual education, this may be COVID-19's longest lasting legacy. The survey data that follows is broadly representative of the American population, including all ages, ethnic groups, income levels, and geographic locations. We are confident it is a representative snapshot of America's attitudes to virtual healthcare. Seven key themes emerged from this data – we hope these offer you guidance as you try and navigate this new, more virtual world.

1. Although telehealth is not new (we have been doing audio-only consults since the 1920s using ship-to-shore radio and video visits since the 1960s), COVID-19 has exposed most people to it, many for the first time.

2. Willingness to use, and even a preference for, telehealth inversely correlates with age. However, we believe that the early exposure of Generation Z and Millennials to telehealth will reinforce their preferences as they grow and begin utilizing more healthcare. This will have significant impact on the future of primary care as a business.

3. For those who prefer in-person visits, most cited condition-specific needs, unsure availability from their provider, or general distrust. The latter two might be overcome with better marketing.

4. More than 1/3 of those surveyed have used a direct-to-consumer or "online-only" provider. This is higher than expected. Online-only providers offering a range of telehealth services may put significant downward pressure on traditional primary care revenue.

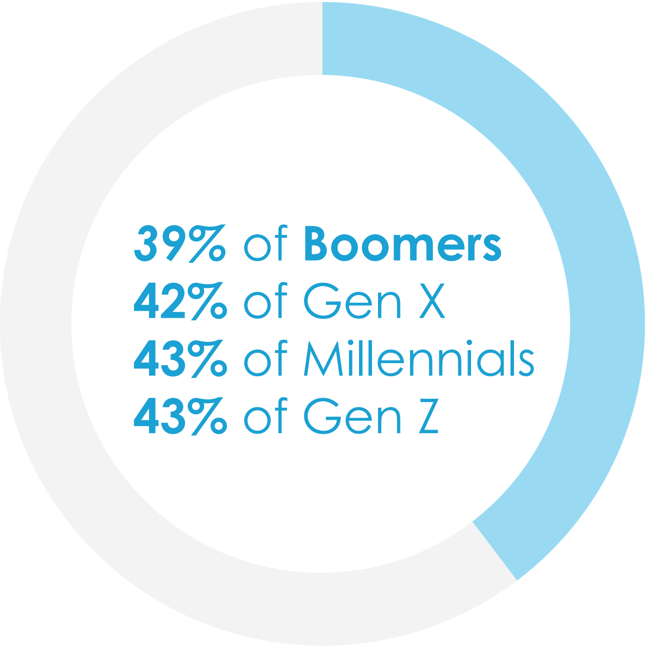
5. Telehealth price sensitivity inversely correlates with age. Half of younger users indicate that they are willing to pay more out-of-pocket for a telehealth visit than an office visit. We call this the "convenience premium."

6. While nearly 73% of those surveyed cited security and privacy of a telehealth visit as important, 65% also said they will use whatever system their provider uses and trust it as secure enough. Providers therefore have a responsibility to provide secure, private systems, but vendors may be constrained in their ability to charge for these features as they do not translate to customer demand.

7. Although there are strong (inverse) correlations between telehealth use and age, there is little difference across income levels. Modality (video/voice/messages) also seems to be evenly distributed across ages and incomes, likely driven by what providers make available.

Telehealth Experience

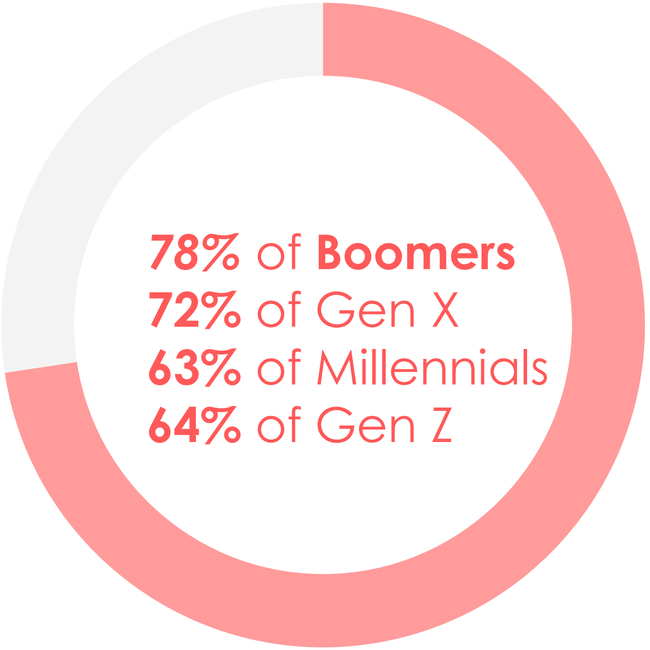
Generational Insights



No statistical difference by generation

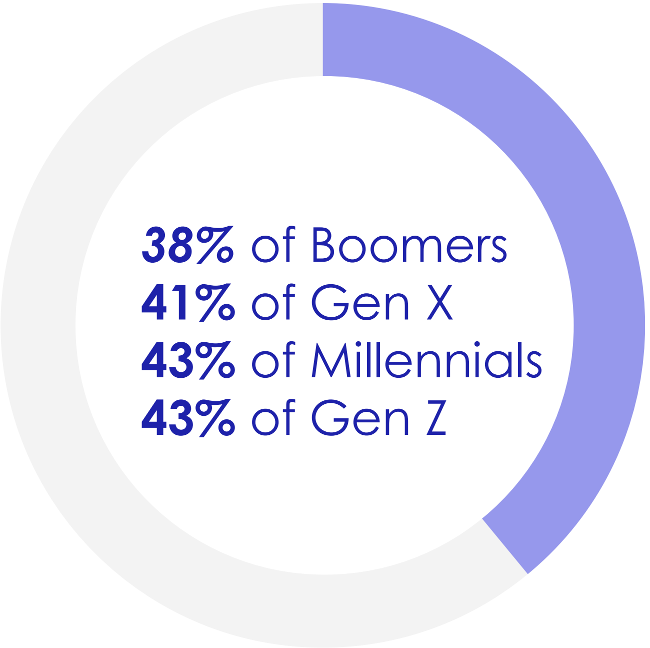
Have ever **used telehealth**

(any time)



Have had **any kind of healthcare visit** in the past 6 months

(during COVID-19)



No statistical difference by generation

Have **used telehealth** for a healthcare visit in the past 6 months

(during COVID-19)

Telehealth Experience

40%
Have used ANY form of telehealth in the past 6 months

26%
Have seen a provider through a VIDEO visit

22% of Boomers
27% of **Gen X**
31% of **Millennials**
30% of **Gen Z**

22%
Have consulted with a provider via PHONE CALL

No difference by generation

21% of Boomers
22% of Gen X
23% of Millennials
25% of Gen Z

8%
Have consulted with a provider via MESSAGES

7% of Boomers
7% of Gen X
10% of **Millennials**
15% of **Gen Z**

Generational Insights

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*Note: Percent is among those who have seen this provider via any method in the past 6 months.

Generational Insights

Future Telehealth Willingness

77%

Willing* to use some form of telehealth, post-COVID

58% of Boomers
68% of Gen X
76% of **Millennials**
73% of Gen Z

Willing* to use VIDEO

67% of Boomers
71% of Gen X
78% of **Millennials**
75% of Gen Z

Willing* to use PHONE CALL

59% of Boomers
62% of Gen X
73% of **Millennials**
68% of Gen Z

Willing* to use MESSAGES

vs.

89% of **Boomers**
83% of Gen X
79% of Millennials
79% of Gen Z

willing* to go to the OFFICE

Note: Willingness was measured on a 5-point scale ranging from 1 – Not Willing at All to 5 – Very willing. "Willing" refers to top 2 box (very willing 5 or 4).

Generational Insights

Future Telehealth Preference

41%

Prefer* to use telehealth in specific circumstances, post-COVID

19% of Boomers
35% of **Gen X**
44% of **Millennials**
42% of **Gen Z**

Prefer* to use VIDEO

18% of Boomers
24% of Gen X
34% of **Millennials**
42% of **Gen Z**

Prefer* to use PHONE CALL

7% of Boomers
13% of Gen X
24% of **Millennials**
33% of **Gen Z**

Prefer* to use MESSAGES

vs.

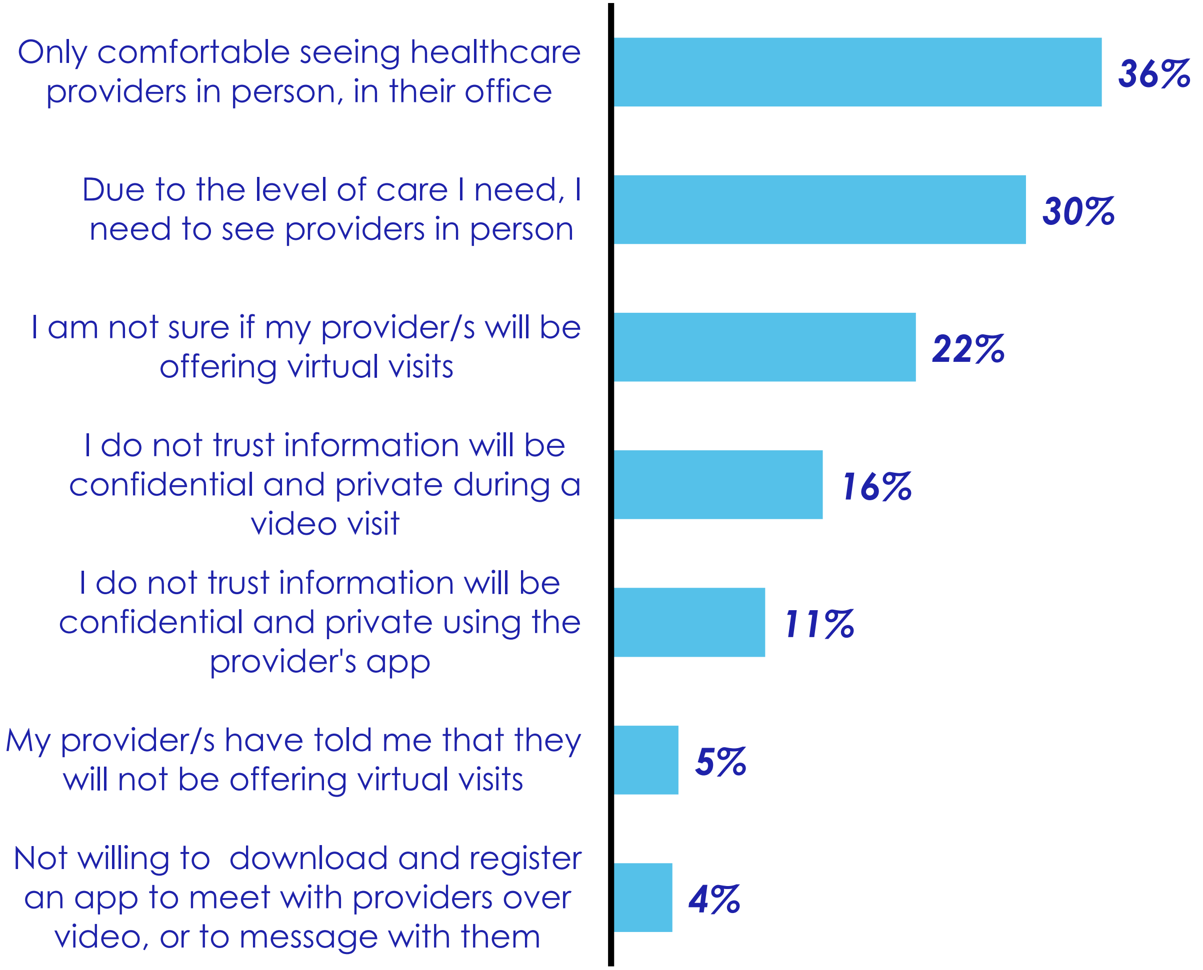
71% of **Boomers**
55% of Gen X
47% of Millennials
42% of Gen Z

Prefer* to go to the OFFICE
for all circumstances

Note: Respondents were asked how they prefer to see each of their specific providers for a routine or a needs-based visit, post-COVID. Preference was established based on those who selected a preference for telehealth among any of their providers for any kind of appointment.

Understanding the Office-Only Preference

Reason for preferring **office visits** in all circumstances



**Note: Willingness was measured on a 5-point scale ranging from 1 – Not Willing at All to 5 – Very willing. "Willing" refers to top 2 box (very willing 5 or 4).*

Telehealth Cost Comparison

Generational Insights

Expected Out of Pocket Expenses for Trusted Healthcare Provider, Compared to In-Person Visit

Telehealth should cost LESS

63% of **Boomers**
45% of Gen X
34% of Millennials
34% of Gen Z

than in-person visit for VIDEO VISIT

Telehealth should cost LESS

73% of **Boomers**
54% of Gen X
40% of Millennials
47% of Gen Z

than in-person visit for PHONE CALL

Telehealth should cost LESS

63% of **Boomers**
50% of Gen X
38% of Millennials
43% of Gen Z

than in-person visit for consult via MESSAGES

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Online-Only Provider Experience

Among the 36% who have used a virtual-only provider for ANY kind of visit…

Likelihood to recommend online-only provider to family or friends

-9 Boomers
+25 Gen X
+25 Millennials
+3 Gen Z

NPS

If you could use online-only provider for your next need, not matter what, who would you use?

15% of Boomers
35% of Gen X
49% of **Millennials**
56% of **Gen Z**

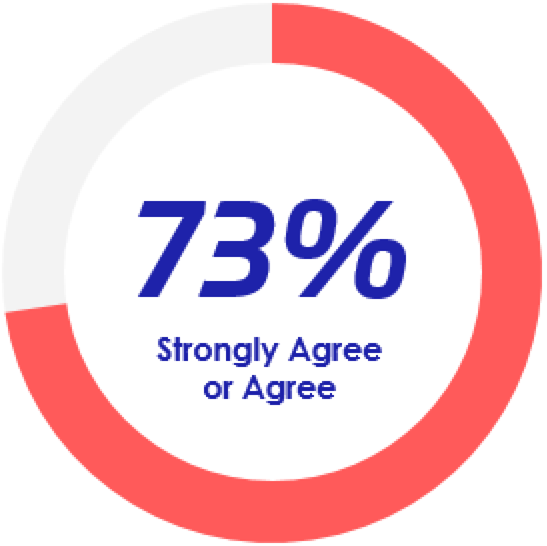
Online Only Provider

85% of **Boomers**
65% of Gen X
51% of Millennials
44% of Gen Z

Trusted Provider

Consumer Technology Beliefs

Among those willing to adopt telehealth in the future



"It is more important to me to have a private and secure video visit with my healthcare provider than it is for the video visit to be convenient and easily accessible."

"No matter the video platform, whatever video platform my healthcare provider recommends, I am willing to trust and use."

Thank You

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