

OCTOBER 2020

# An emerging digital audience: First-time telehealth adopters

Study reveals what first-time telehealth adopters can tell us about the virtual future of healthcare.



# The pandemic accelerated the shift to telehealth, patient preferences will sustain it.

The pandemic has upended nearly all aspects of life but perhaps one of the most interesting relationships being put in the spotlight is the one we have with our health and, by proxy, our healthcare providers. Unlike other industries where the pandemic *forced* people who would prefer in-person interactions to digital, when it comes to healthcare, it's not necessarily that people didn't *want* to interact digitally, but that telehealth wasn't widely available as an option pre-COVID.

*If patients continue with telehealth over office visits, will it be because they don't feel comfortable visiting in-person or because they actually prefer the virtual experience?*

For those who used telehealth for the first time during the pandemic, the answer appears to be the latter. In fact, telehealth could be the solution to frequent doctors visits to monitor an ongoing condition or just general access to those living in rural areas.

This wave of first-time telehealth adopters, coupled with increasing at-home healthcare solutions, could lead to a massive disruption in the way healthcare functions going forward. This report provides an overview of first-time adopters, including their overall preferences and behaviors, to help you prepare for what's next in healthcare.

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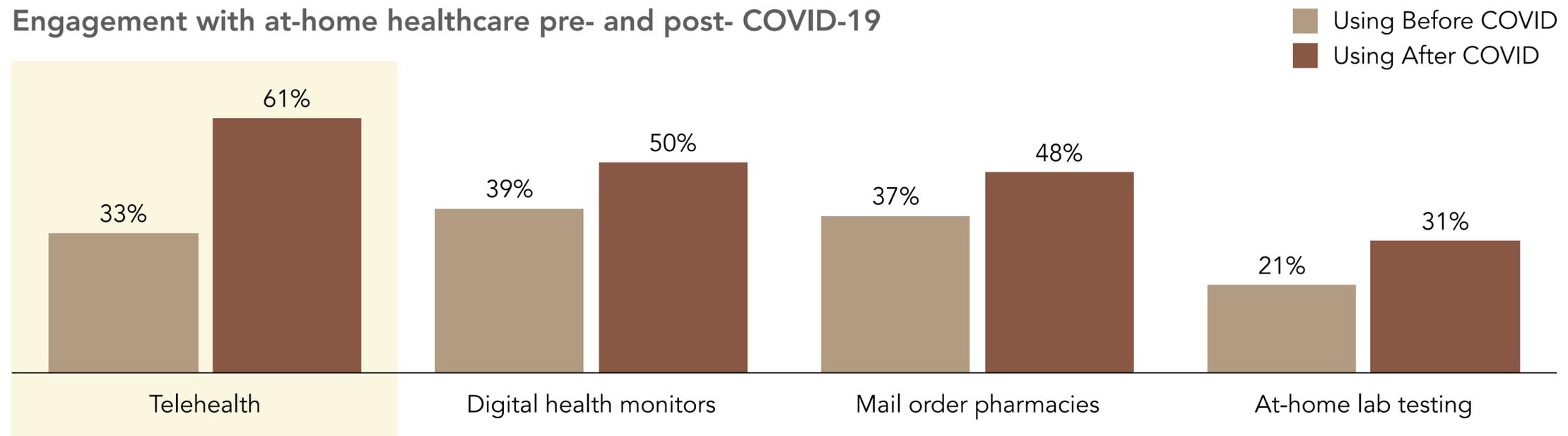
## Study overview

In August 2020, Hero Digital surveyed 1,673 people about their preferences and behaviors for interacting with healthcare providers and how they may have changed as a result of the COVID-19 pandemic.

# Telehealth has seen huge surges in adoption

During COVID, there was an increase in telehealth usage, with **2 out of 3** people now saying they've used it at least once.

Engagement with at-home healthcare pre- and post- COVID-19

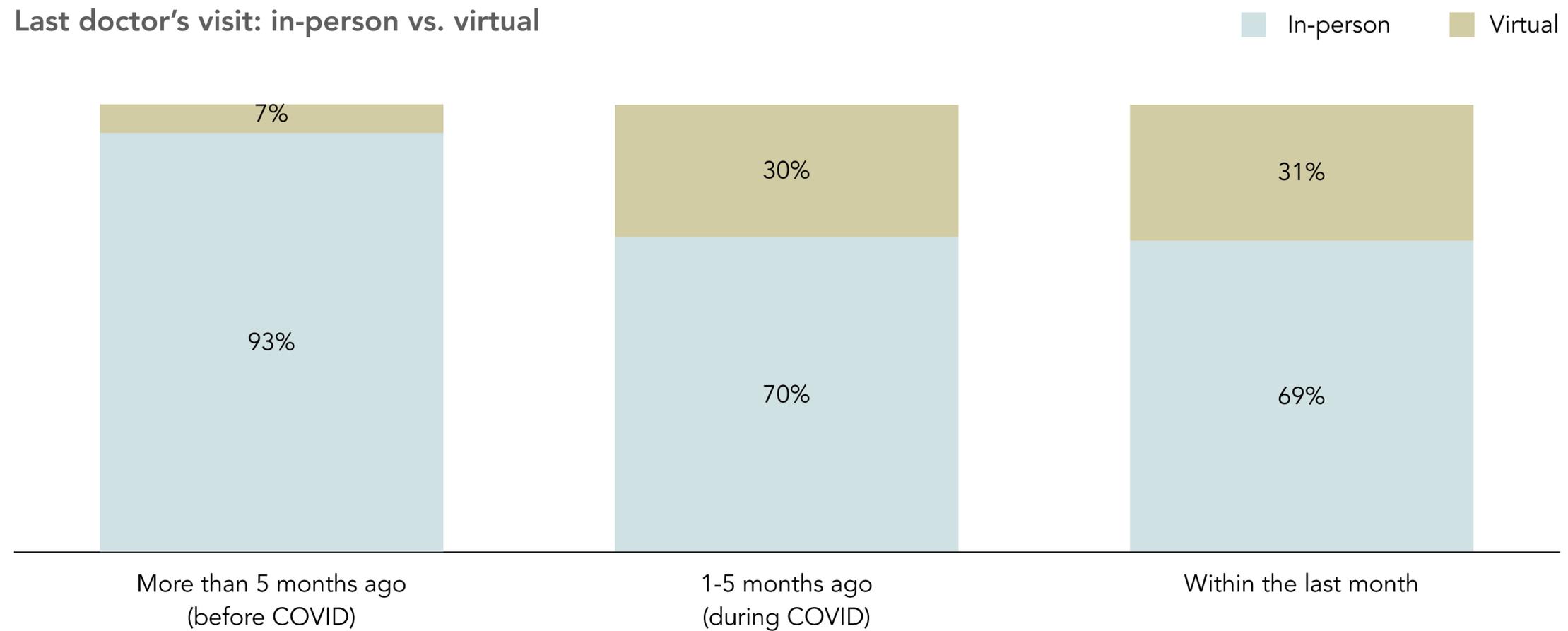


Percent increase in adoption during COVID-19



# Patients are getting used to virtual visits

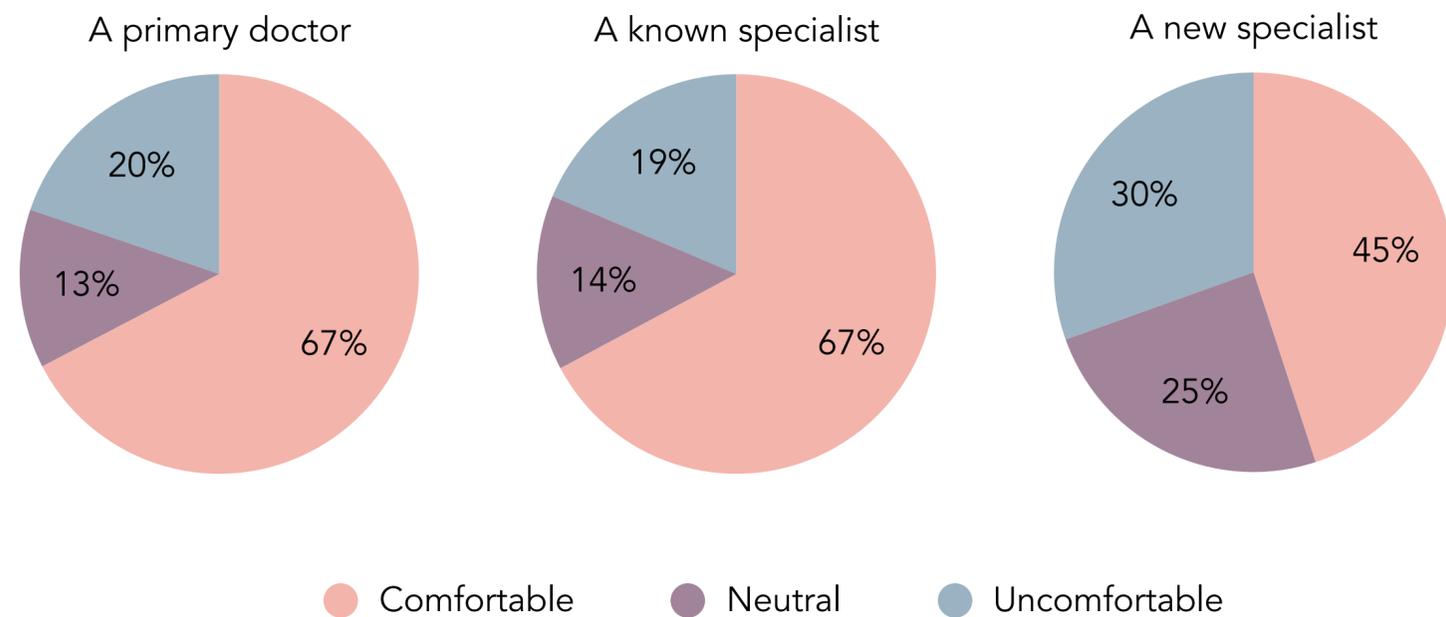
Even as doctors' offices loosen restrictions, **a third** of patients reported that their last visit was virtual.



# Interest in telehealth is not only about safety

Comfort with in-person visitation doesn't appear to have a strong impact on interest in Telehealth.

Comfort with in-person visitation among those interested in telehealth



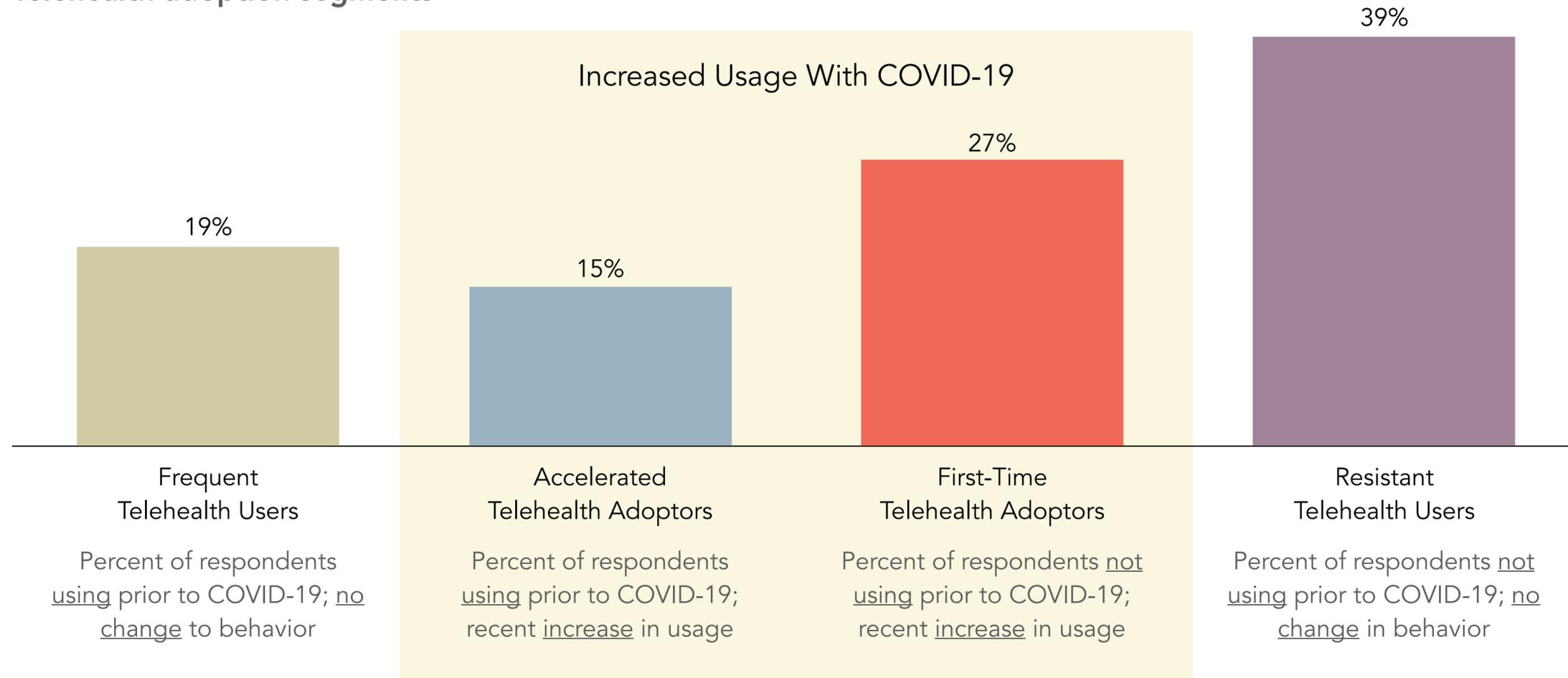
**67%** of people who are interested in seeing primary care doctors and known specialists report that they would be comfortable returning to see the doctors in-person as well.

Patients are less likely to feel comfortable seeing a doctor they haven't seen before.

# Telehealth adoption segments

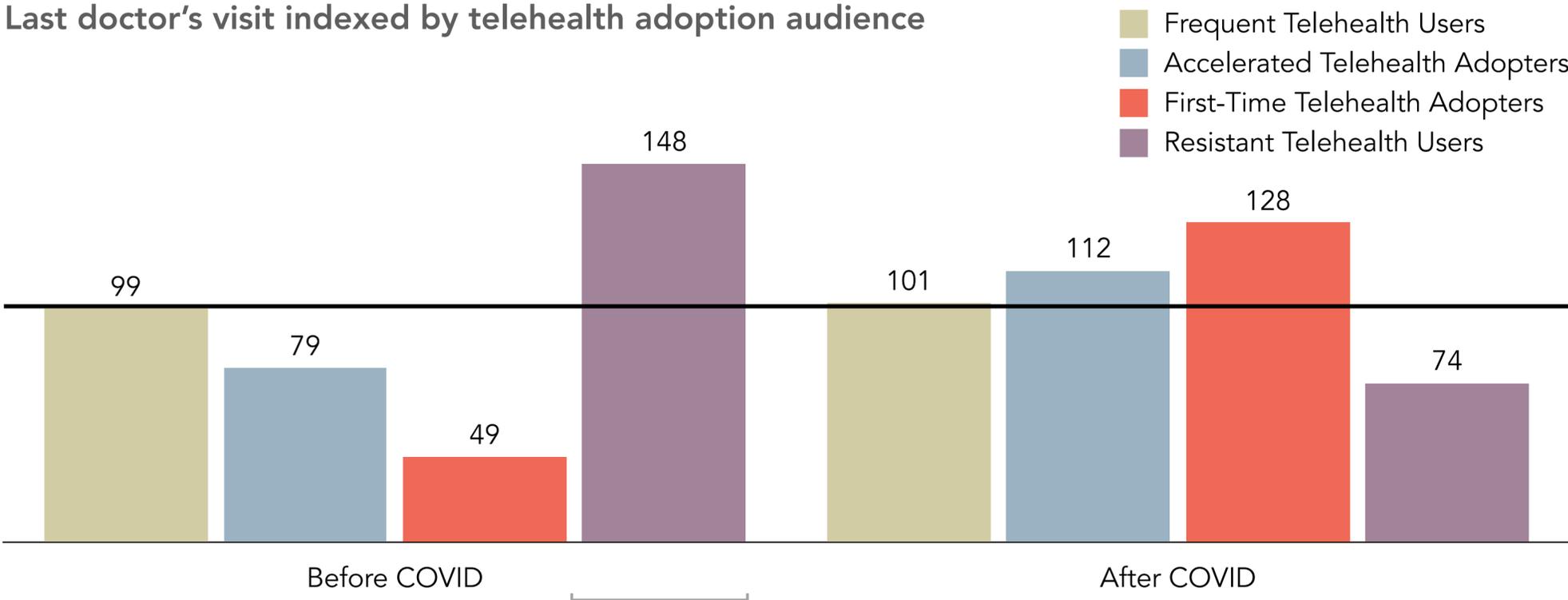
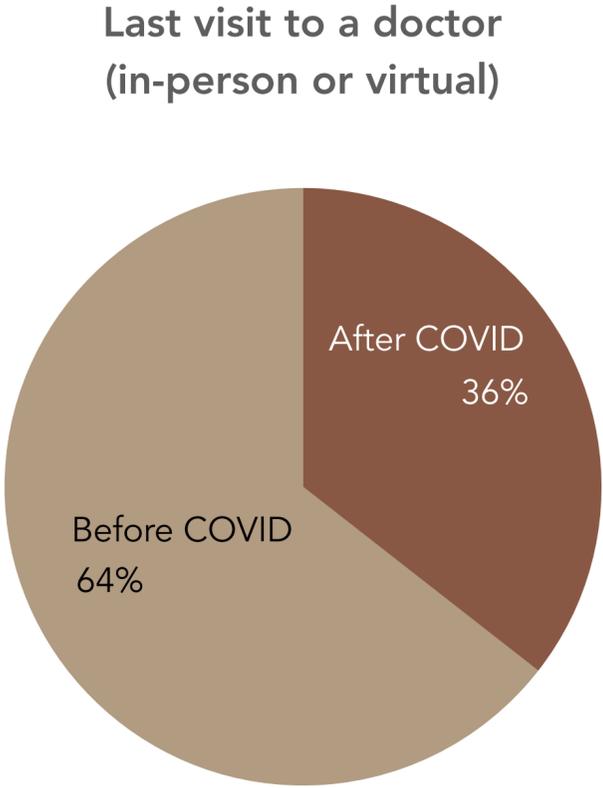
By segmenting audiences by not only their use telehealth prior to COVID-19, but also by their changes in behaviors during the pandemic, unique audience profiles begin to emerge.

Telehealth adoption segments



# Resistant Users don't visit the doctor often

About **half** of those who haven't engaged with telehealth haven't been to the doctor since COVID



Patients who have not engaged with telehealth (Resistant) are **48%** more likely to have not visited a doctor since COVID started.

# Ongoing conditions can be managed through telehealth

Patients reporting that prior to COVID-19 saw a doctor for management of an ongoing condition were **+20%** more likely to have increased telehealth usage and **+32%** more likely to try for the first time.

Healthcare provider visitation by telehealth adoption segment  
(indexed to total)

Provider visitation	Frequent Telehealth Users	Increased Usage With COVID-19		Resistant Telehealth Users
		Accelerated Telehealth Adopters	First-Time Telehealth Adopters	
For regular wellness check-ups	104	97	107	94
Management of an ongoing condition	93	120	132	73
When I have a specific concern	80	103	108	103
When it's an emergency	75	95	106	109

# Profile: First-Time Telehealth Adopters

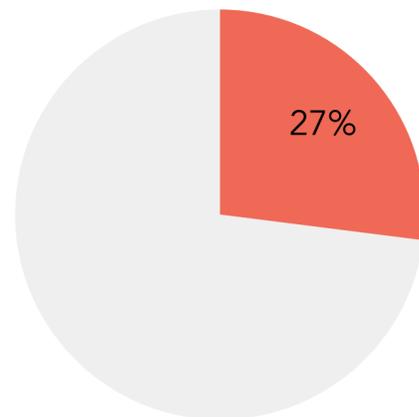
First-Time Telehealth Adopters skew towards an audience that is older, more suburban or rural, and middle-lower income. They also tend to see doctors more regularly and have an ongoing condition.

## First-Time Telehealth Adopters

There are multiple reasons why someone may have not engaged with Telehealth prior to the pandemic. Regulations, processes, and “the way I’ve always done it” could all have played a part in their delayed adoption.

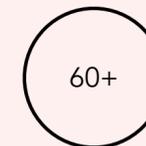
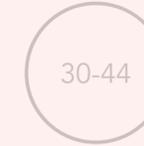
However, the convenience and easy access to healthcare that telehealth provides this audience may open a world of possibilities that will last far beyond the pandemic.

Audience share

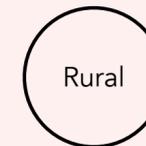


## More likely to be...

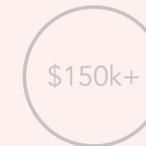
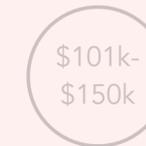
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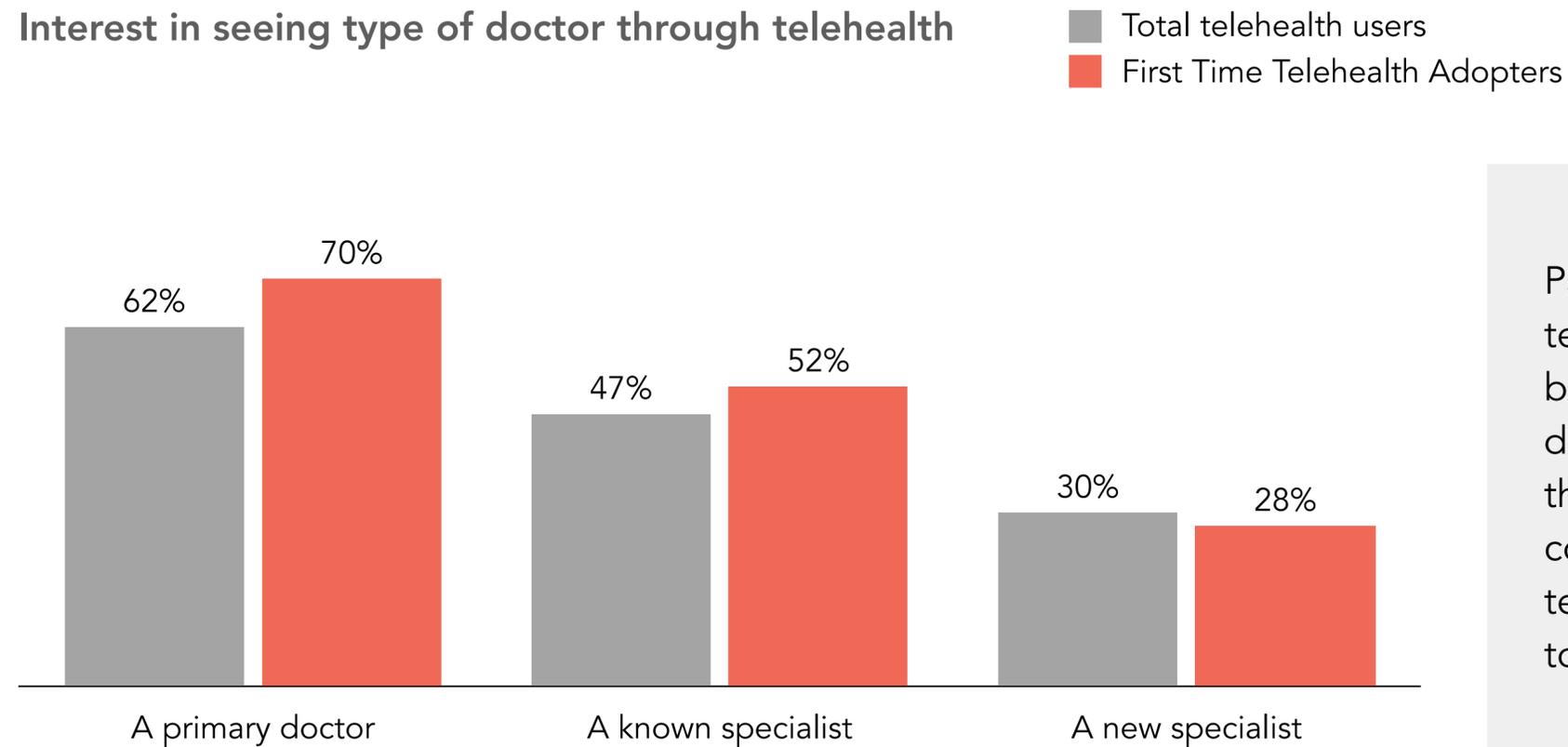


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# Familiarity and trust are key drivers in telehealth interest

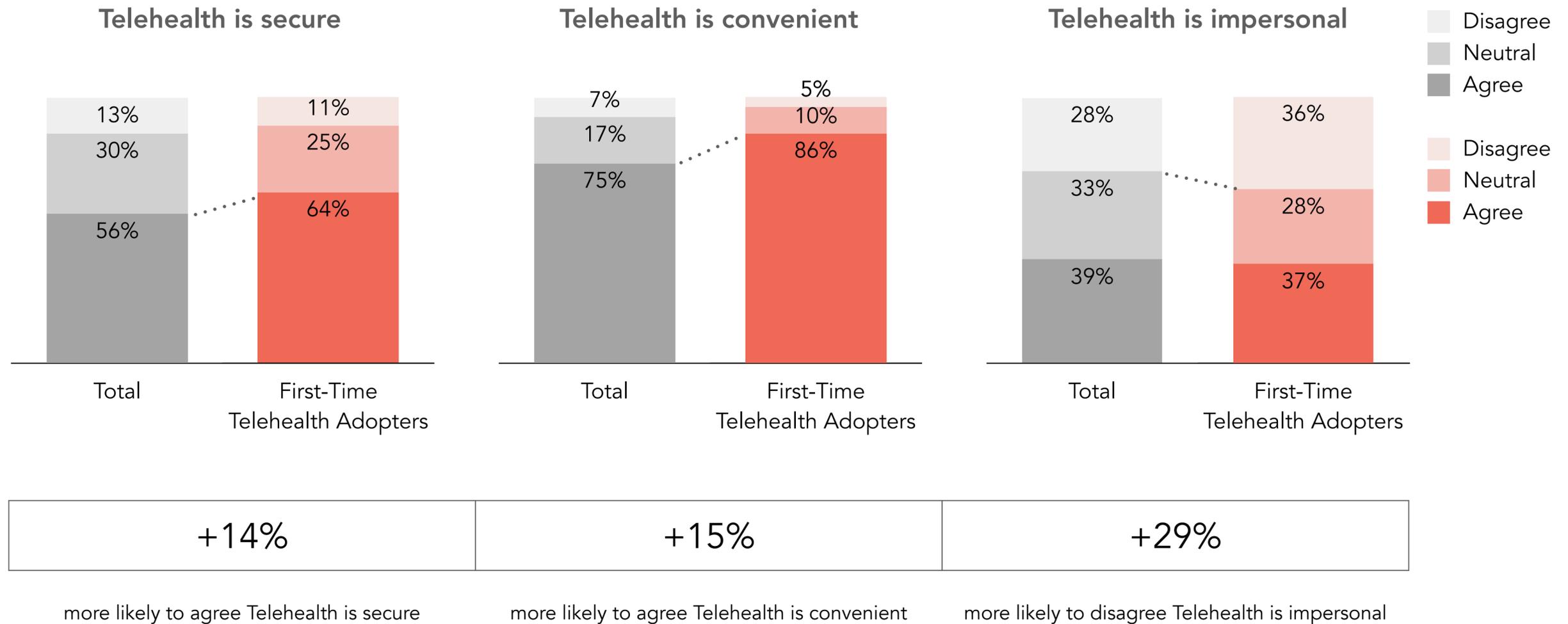
94% of First-Time Telehealth Adopters are interested in seeing a variety of doctors virtually.



Patients who are new to telehealth are more likely to be interested in seeing a doctor they know and trust; they're less likely (even compared to overall telehealth users) to be open to seeing a new specialist.

# Sentiments about the experience have been positive

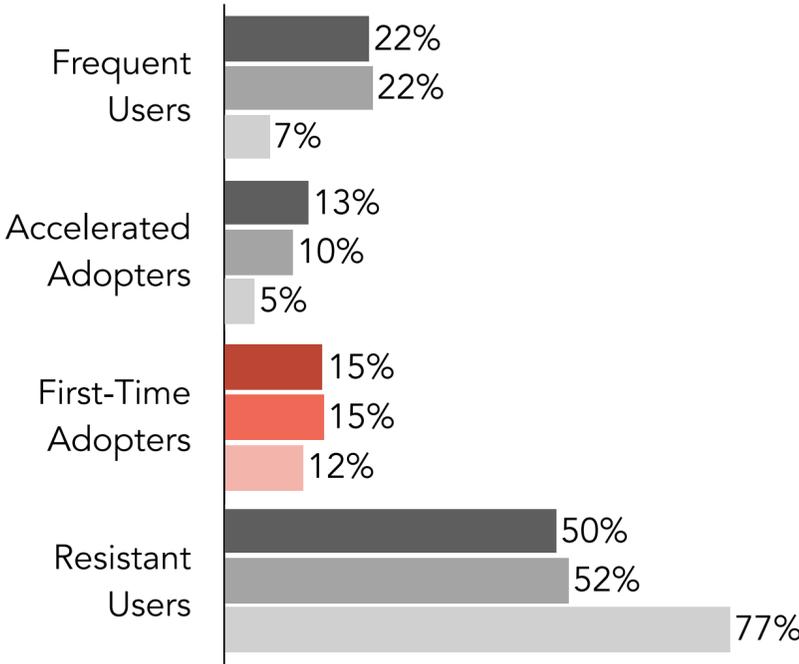
First-Time Telehealth Adopters overall have positive sentiments about the experience.



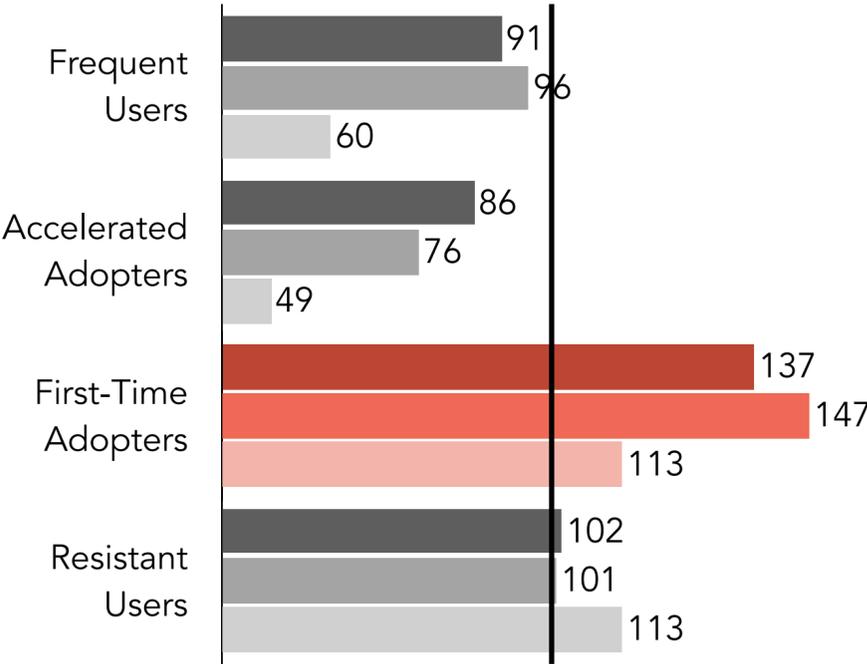
# Usage of other at-home healthcare is equally high

Telehealth can't exist in a silo, patients need to be open to other at-home healthcare to make it sustainable. First-Time Telehealth Adopters are more likely to have engaged with other at-home healthcare since COVID.

**First Time Telehealth Users:  
Engagement with other at-home healthcare**



**First Time Telehealth Users:  
Engagement indexed to total patient engagement**

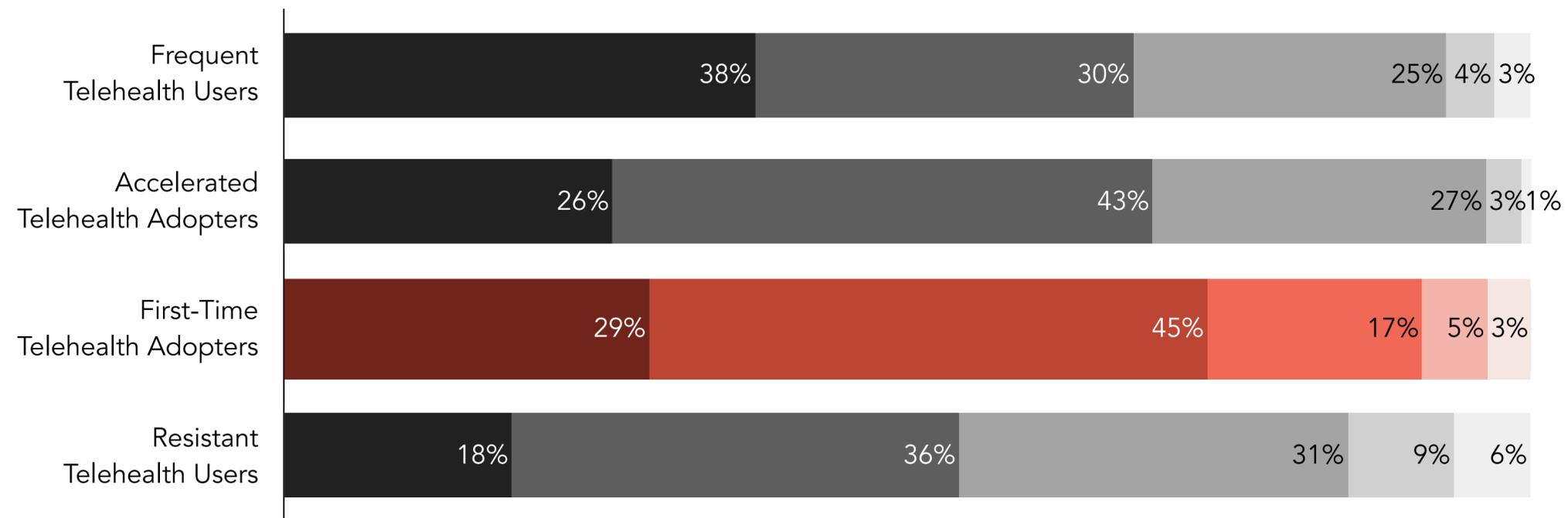


Digital health monitors
  Mail order pharmacies
  At-home lab testing  
 Digital health monitors
  Mail order pharmacies
  At-home lab testing

# A willingness to share personal health data

**74%** of First Time Telehealth Adoptors are willing to provide their personal data directly to healthcare professionals.

Willingness to provide personal data directly to healthcare professionals



First-Time Telehealth Adoptors are the most willing to share personal information such as digital health monitors, weight tracking apps, and genetic information directly with their doctors.

This may be due to a greater need to monitor ongoing conditions or trust in existing doctors.

- Definitely yes
  Probably yes
  Maybe yes, maybe no
  Probably no
  Definitely no
- Definitely yes
  Probably yes
  Maybe yes, maybe no
  Probably no
  Definitely no

# Telehealth is opening new possibilities.

Virtual healthcare is meeting changing needs of patients, and creating opportunities for innovation and reinvention in healthcare.



## Telehealth offers solutions to long-standing friction points for patients.

For patients who see a specialist for a chronic condition, telehealth coupled with other digital technology can remove the need to see the doctor every week. Likewise, for patients who live in remote areas, telehealth provides convenient access to healthcare not readily available to them before.



## Openness to at-home health solutions will make telehealth sustainable.

In addition to telehealth, willingness of patients to monitor their health progress at home and provide the information to their healthcare providers will be essential to evolving telehealth as a sustainable solution.

# Turning these insights into action

COVID is a massive disruptor, but also acting as a catalyst to highlight drivers at the core of patient needs. Your digital strategy needs to start with a deep understanding of the audiences you serve.

## 1 Understand your audience

Recognizing who, post-COVID, is newly receptive to telehealth and for what kind of care can help orgs personalize outreach and direct patients to the best options for them. (see benchmark on slide 16)

## 2 Prioritize around audience needs

Evaluate patients' telehealth experiences to date and identify ways to build on positive momentum with first-time users. Likewise evaluate physician experiences to ensure adoption and buy-in.

## 3 Envision the future as a comprehensive solution

Build, expand and scale your virtual health offerings to evolve toward an integrated end-to-end experience, catering to the full patient journey that suits your audience rather than one-off visits.

Trusted by healthcare leaders



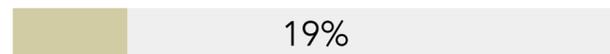
To learn how Hero Digital can help you act on these insights to improve your patient experience, contact us at [business@herodigital.com](mailto:business@herodigital.com).

# Telehealth Adoption Audience Profiles

Leverage these profiles as a starting point for understanding your patients and how their attitudes may have changed during the pandemic.

## Frequent Telehealth Users

Audience share



## Accelerated Telehealth Adopters

Audience share



## First-Time Telehealth Adopters

Audience share



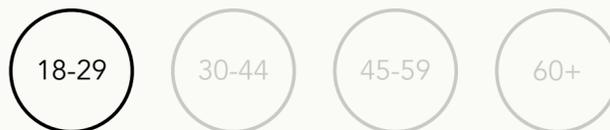
## Resistant Telehealth Users

Audience share



### More likely to be...

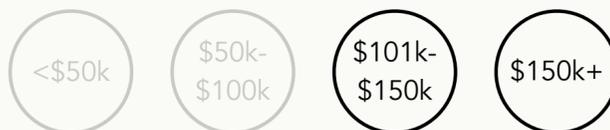
AGE



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### More likely to be...

AGE



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INCOME



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Create experiences of Truth & Beauty.