

MARCH 2021

# Getting Beyond the Either/Or of Virtual vs. In-Person Care

Study reveals opportunities and best practices for healthcare providers to adopt a human-centered, hybrid model of care



# Getting Beyond the Either/Or of Virtual vs. In-Person Care

## A hybrid approach to care, with connection at the core.

Over the past year the rapid adoption of telehealth has opened the door for a new level of convenience and ease in healthcare interactions to put patients – and their preferences – at the center of care. As more patients and providers embrace virtual care, however, it's becoming clear how important trust, comfort, and an ongoing relationship are in any mode of care.

**From the consumer perspective, where are the greatest opportunities for expanding virtual healthcare? And how can healthcare providers testing these new waters deliver a personal, patient-first virtual care experience on par with in-person visits?**

This report examines different care contexts to identify where virtual makes sense – and where it may not. It reveals patient expectations and preferences for interacting with providers – and where technology needs to be supplemented with a human touch.

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### Study overview

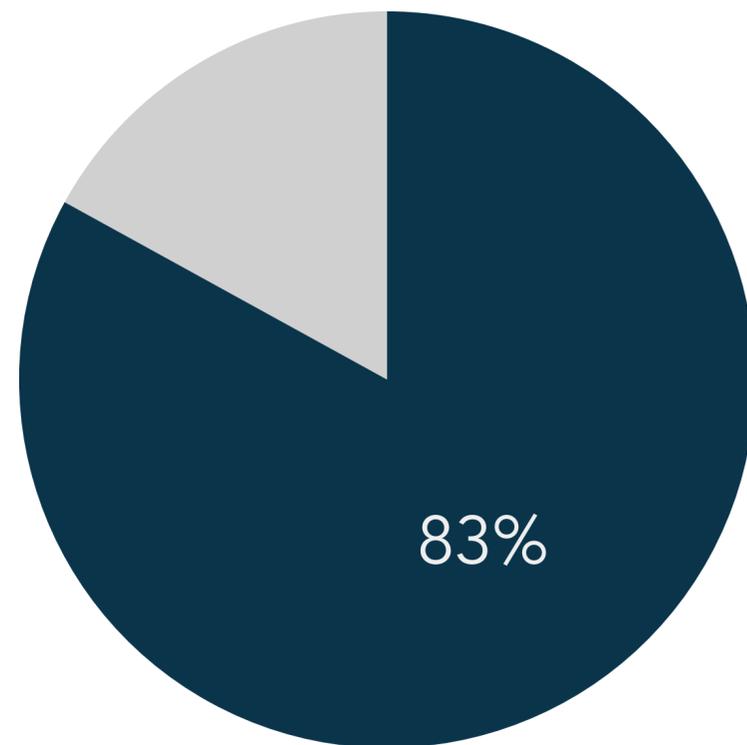
In January 2021, Hero Digital surveyed 1,500 people about their expectations and sentiment when it comes to interacting with their healthcare providers.

**For virtual health's next  
phase, context is everything**

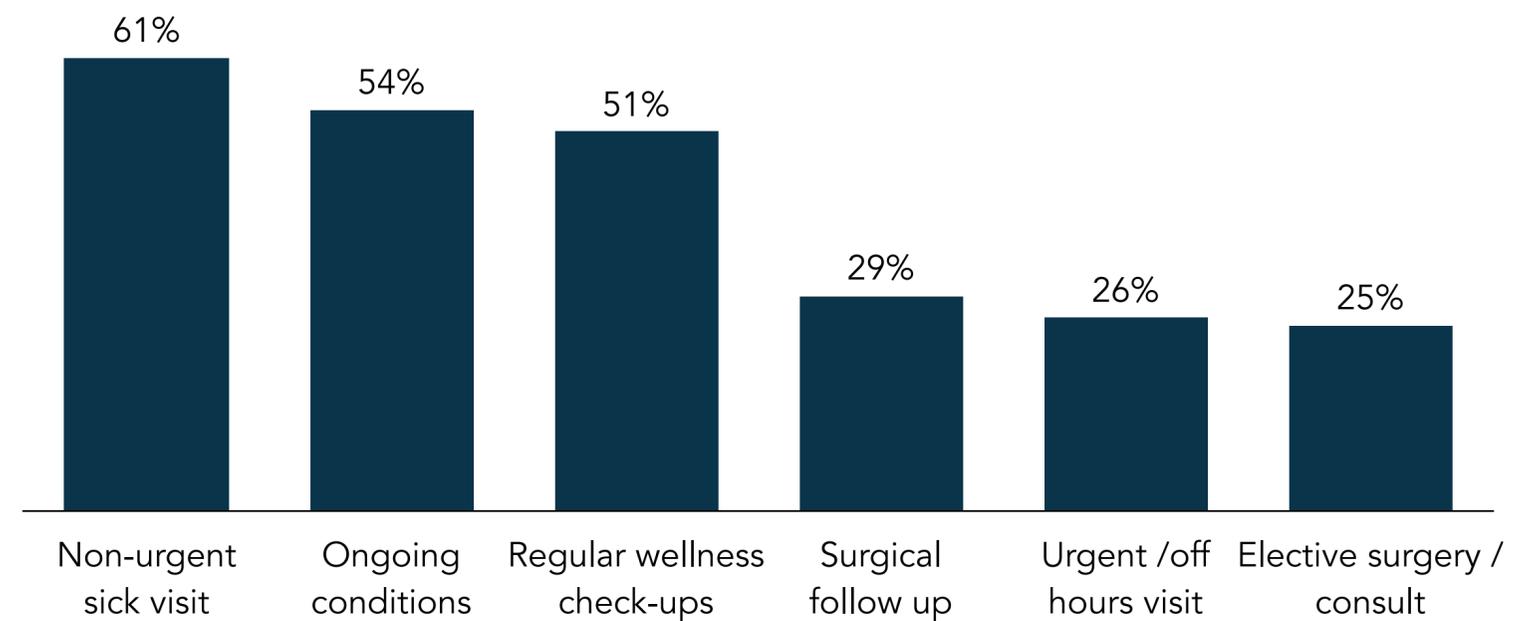
# Telehealth adoption and openness surged over the past year, with 83% of patients now saying they are willing to seek virtual care

Widespread adoption of telehealth created an opportunity to envision and design a multimodal care experience centered on consumers and their preferences.

Open to Telehealth



Type of care willing to seek virtually



# Virtual care is not right for every interaction; patient openness must be considered in the context of their priority needs

Non-urgent sick visits offer an easy gateway to telehealth, while the frequency of visits for managing ongoing conditions promotes openness to virtual touchpoints. Relationships can be formed and translated to digital through regular wellness check-ups.

	Openness to Telehealth		Need for Convenience		Annual Frequency	
	Below Average	Above Average	Below Average	Above Average	Below Average	Above Average
Non-Urgent Sick Visit		█		█		█
Ongoing Conditions		█		█		█
Regular Wellness Check-Up		█		█		█
Urgent Off-Hours Visit	█			█		█
Surgical Follow-Up	█			█		█
Elective Surgery Consult	█			█		█

**Focus Areas for Establishing Virtual Care**

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**Non-Urgent Sick Visits:** Easy Telehealth Entry Point  
High need for convenience + openness to virtual care

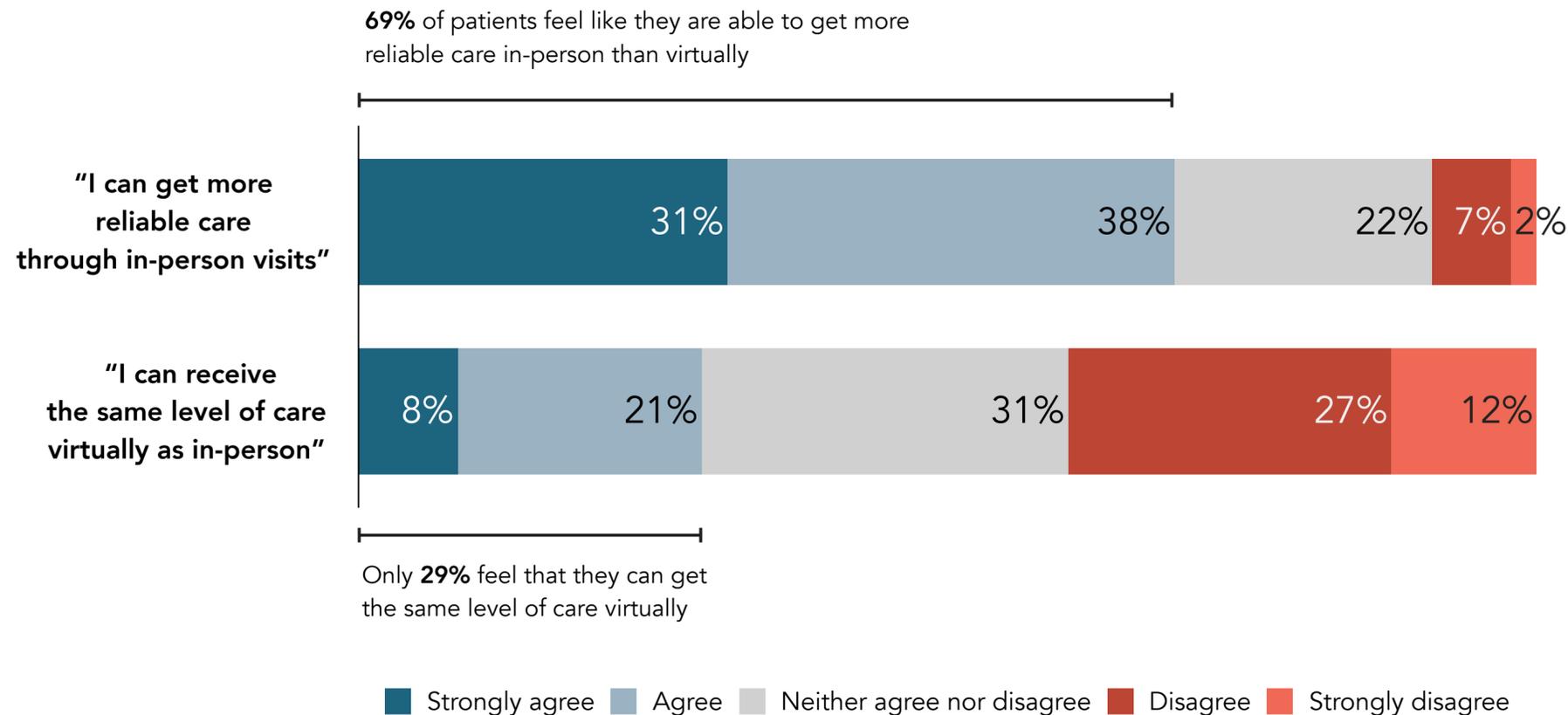
**Ongoing Condition:** Digital Opportunity  
Repeat visits increase willingness to seek digital where applicable

**Regular Wellness Check-Up:** Relationship Strengthenener  
Frequent visits + established relationships, bridge to virtual care

# Nearly 70% of patients still feel that in-person care is more reliable, though they remain open to telehealth

44% of those who say in-person visits are more reliable prefer virtual visits “where it makes sense,” showing the potential for a hybrid virtual / in-person care model.

## Sentiments around virtual care



### "Where it makes sense I prefer virtual visits over in-person"

Of those patient that feel in-person visits are more reliable, **44%** sometimes prefer virtual visits

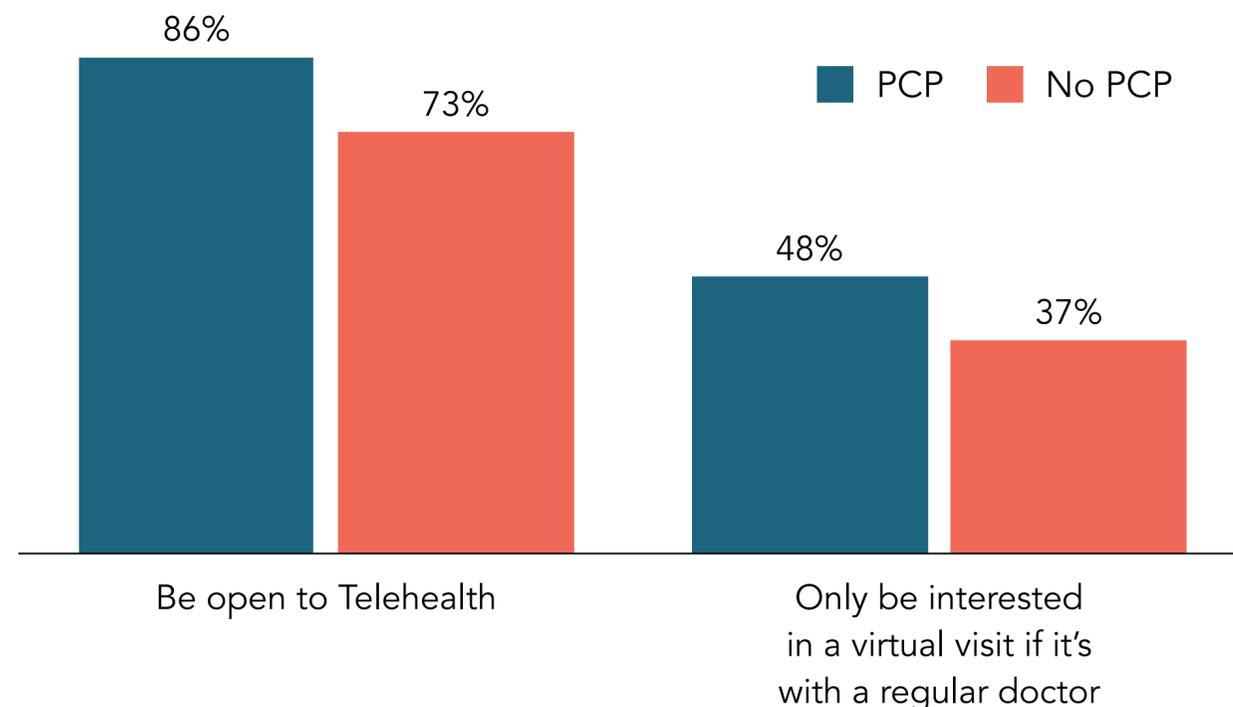
For patients who feel virtual visits offer the same level of care as in-person, **78%** prefer virtual visits

# **Evolving toward a hybrid model of care**

# Even in the context of virtual care, patients still value ongoing relationships with their primary care doctors

Patients who have a primary care physician are more receptive to telehealth but they prefer virtual interactions to be with their primary PCP.

People who have a Primary Care Physician are significantly more likely to:



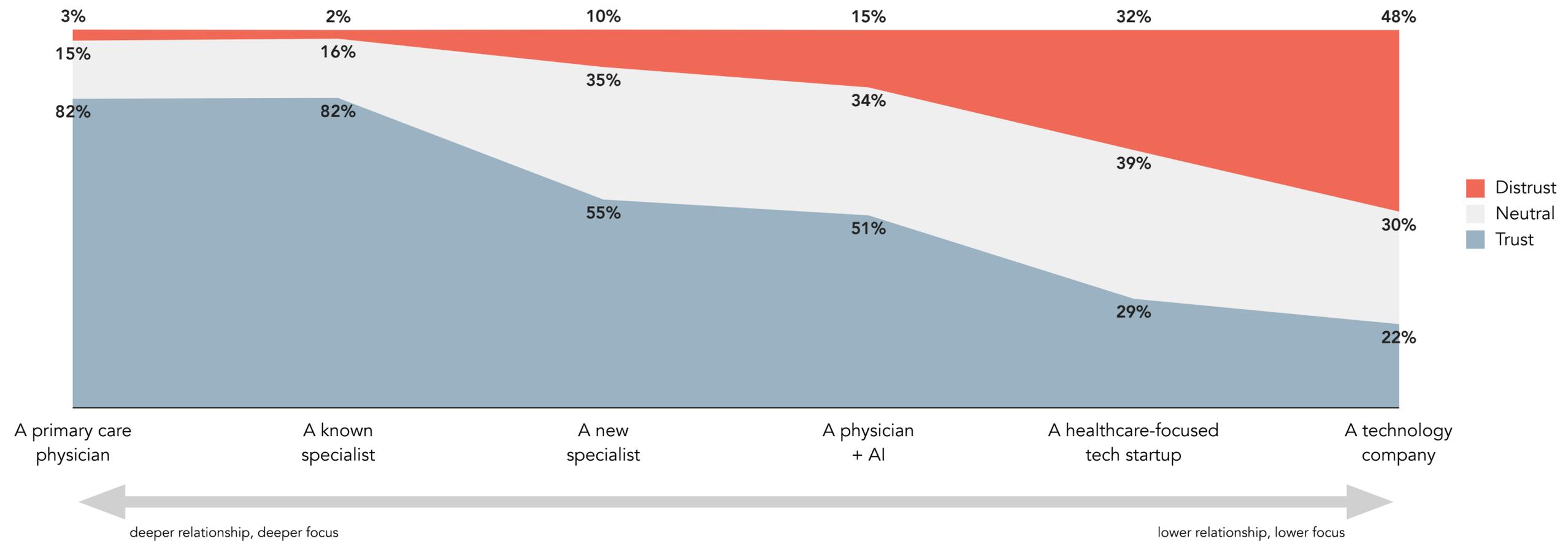
New and expanding primary care entrants (e.g. One Medical, Partners in Primary Care, Crossover Health) are offering hybrid care models that integrate virtual care to improve access and convenience and lower costs to individuals and employers.

However, in the rush to virtual, it's important not to minimize the provider relationship that patients value. By combining the relationship and care continuity of a PCP with the convenience of virtual visits, there is an opportunity to truly put patient's needs first.

# Relationships translate to trust – patients are far more likely to believe a diagnosis from PCPs and known specialists

Virtual health companies with digital-first care models will need to engage patients with an eye towards earning their trust.

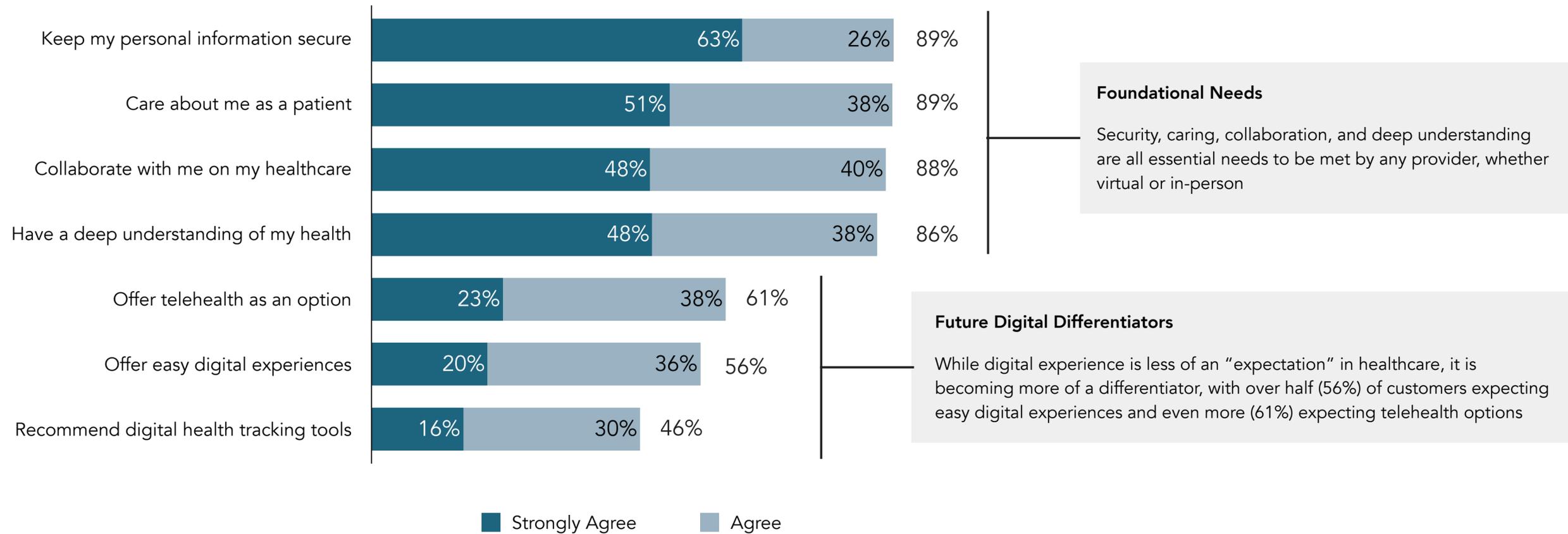
Trust a diagnosis from....



# Patients report having foundational “table stakes” expectations of every healthcare provider, whether in-person or virtual

Having met those foundational needs, however, providers’ opportunity to differentiate centers on digital access and experiences.

I expect my primary healthcare provider to...



# Assessing opportunities for patient-centered digital experiences

# Successful blending of in-person and digital experiences – high-touch and high-tech – will be a key differentiator for healthcare providers moving forward.



## Non-Urgent Sick Visits

### Easy Telehealth Entry Point

A high need for convenience leads to an increased openness to telehealth



## Ongoing Condition Management

### Digital Opportunity

A hybrid model for managing ongoing conditions brings a ton of patient value



## Regular Wellness Checkups

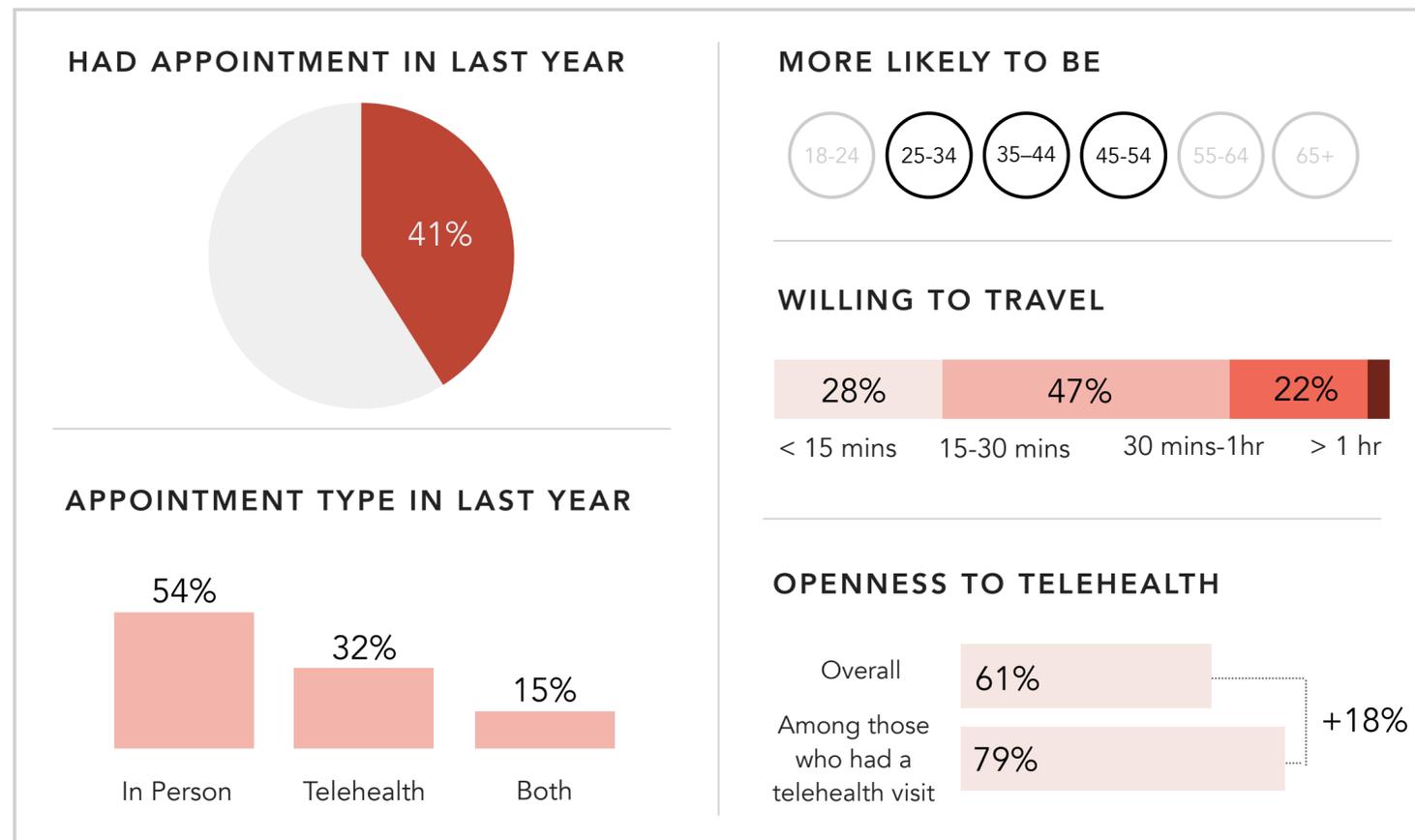
### Relationship Strengthenener

In-person relationships can be established and translate to virtual care where appropriate

# Non-Urgent Sick Visits

Patients are the most open and receptive to virtual care for non-urgent sick visits, making it a low-hanging fruit for digital adoption.

## Non-Urgent Sick Visits

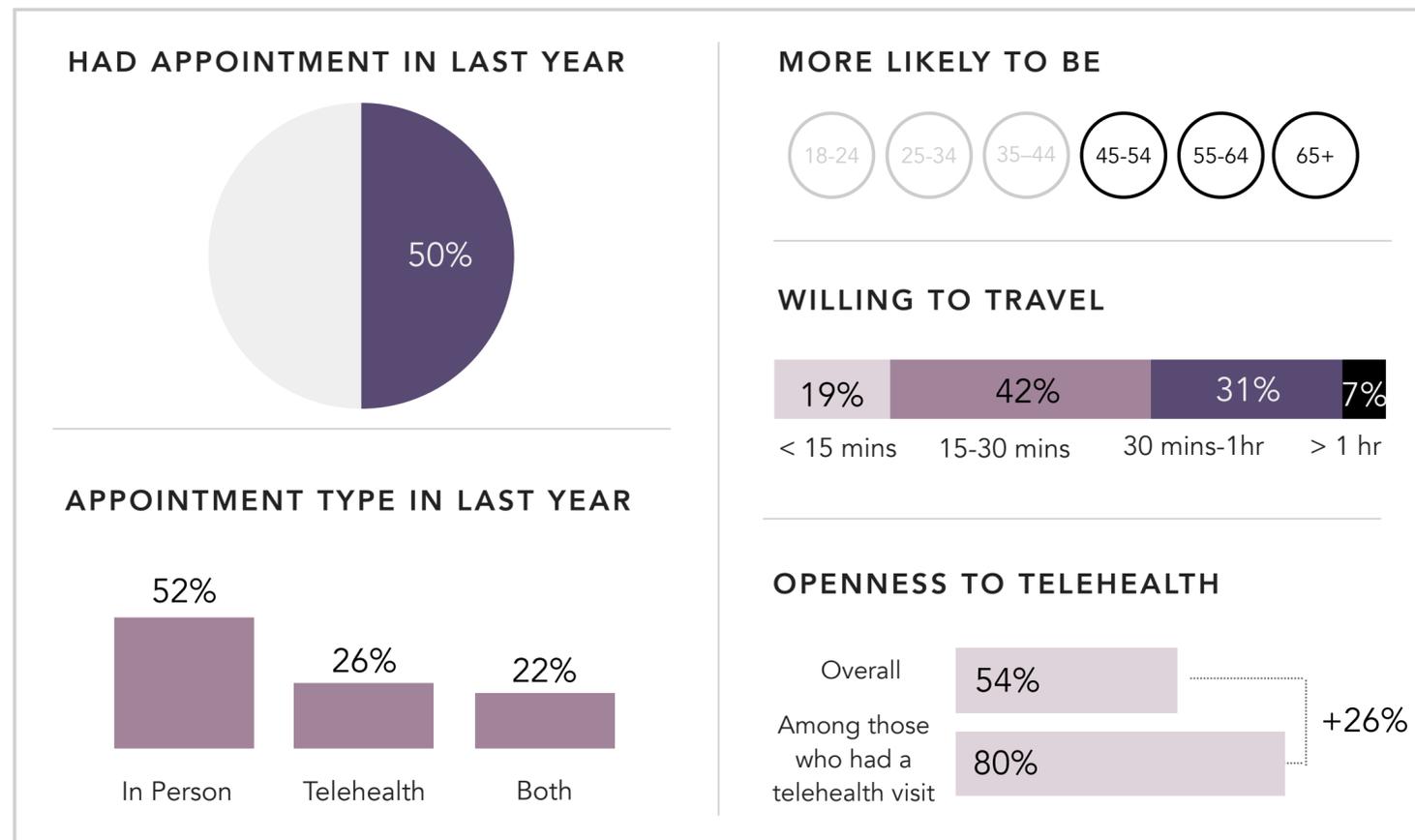


- Of the 41% of people who had a non-urgent sick visit in the past year, 32% of them did so exclusively virtually
- Patients skew younger, and 28% are only willing to travel up to 15 minutes
- 61% of patients are willing to seek non-urgent sick visits via telehealth; this goes up to 79% among those who had a virtual visit in the past year

# Ongoing Condition Management

Patients managing ongoing conditions who tried telehealth saw the greatest increase in receptiveness, making it a ripe opportunity for digital solutions.

## Ongoing Condition Management

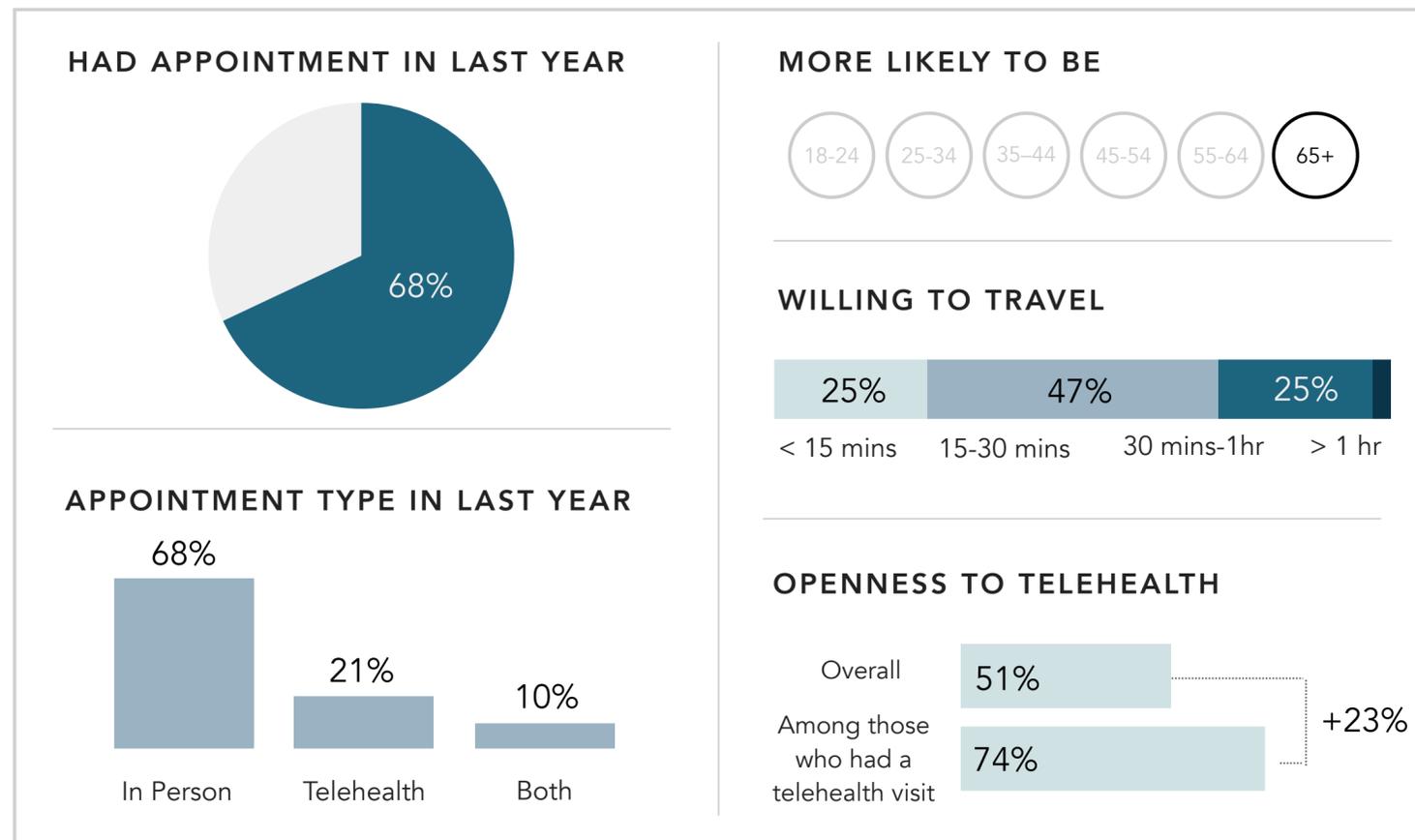


- For the half of people who had an appointment for an ongoing condition in the past year, 22% had both in person and virtual visits
- Patients for ongoing conditions are much more likely to be over the age of 45
- Ongoing conditions had the biggest increase in openness to telehealth after having had a virtual visit; 80% of patients who had a telehealth visit for ongoing conditions are open to doing so again

# Regular Wellness Checkups

Annual Wellness Checkups, generally done in person, are an opportunity to establish and strengthen relationships so that more frequent in-between visits can be handled virtually.

## Regular Wellness Checkups

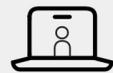


- Regular wellness checkups were the most common type of visit in the past year (68%) for all age groups, but skew slightly towards 65+
- 68% of people said they saw a doctor in person for this type of appointment in the past year
- Over 1 in 4 (28%) patients are willing to travel further than 30 minutes for their checkup, but half (51%) are open to virtual visits as well

# About 1 in 8 (25 million) customers are more likely to switch today than before the pandemic<sup>1</sup>

To win the loyalty of new patients and keep your current ones happy, provide digital ease and convenience where it makes sense while building on existing trust and relationships.

## Digital experiences to attract new patients:



**Virtual non-urgent sick visits are an easy entry point for new customers, especially younger ones.** Making these visits easy and convenient will help them get to know your practice and keep you top of mind for seeking further care.



**While delivering ease and convenience through digital solutions, be sure to address foundational customer needs like security and caring.** By marrying the ease of technology with the trust earned by human connection providers can differentiate from newer health tech entrants.

## A hybrid approach to keep patients happy:



**Regular wellness visits and ongoing condition management are perfect candidates for a hybrid approach.** Offering the convenience of digital engagement and monitoring in the context of an existing patient-provider relationship can deepen trust and satisfaction.



**Nurture human relationships while planning for the digital future.** Digital experiences should be viewed as an enhancement to care, not a replacement. Digital options and engagement can boost customer loyalty and strengthen the doctor / patient bond.

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



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