



# Consumers and Telemedicine

Public release research conducted by





# 5 things to know about consumers and telemedicine



01

## How many people use telemedicine?

Only 8% of adult US consumers have used telemedicine, despite its availability for years. Consumer adoption is stubbornly low.

## Do you know a telemedicine user?

77% of interested non-users do not know anyone who has ever used telemedicine. It's a barrier to trial and adoption.



02



03

## Where did you hear about telemedicine?

Users are much more likely than interested non-users to have first heard about telemedicine from a healthcare provider, a health system or an employer. Are those channels a missed opportunity for greater adoption?

## Would you use telemedicine for depression?

Most Users AND Interested Non-Users are open to using telemedicine for EITHER medical OR behavioral/mental health conditions. 1 in 3 Users have used it for mental health - predominantly anxiety, depression or stress. 7 in 10 say they would use it for mental health, if needed.



04



05

## So what are the top barriers?

Interested Non-Users' top barriers are they have an HCP they can see easily in-person and lack of knowledge. Their questions are about insurance coverage, cost, how it works, and confidence in which conditions really fit.



# About our Public Release Research on Consumers and Telemedicine

Zeldis Research funded a quantitative study on the evolving dynamics of consumer engagement with telemedicine:



Get insight into consumer **barriers**, **misperceptions**, **facilitators** and **triggers** for engagement with Telemedicine:

Users vs. Interested Non-Users	User Experiences	Unmet Needs
<ul style="list-style-type: none"><li>• Demographics (who are they)</li><li>• How first became aware</li><li>• Perceptions<ul style="list-style-type: none"><li>✓ Medical conditions</li><li>✓ Mental health issues</li><li>✓ Quality</li><li>✓ Cost</li></ul></li><li>• Reasons for using / considering using / barriers</li></ul>	<ul style="list-style-type: none"><li>• How long wait before first trying</li><li>• Reasons for waiting to try</li><li>• Reasons for trying</li><li>• How searched</li><li>• Company/app used</li><li>• Provider type</li><li>• Condition(s) discussed</li><li>• Satisfaction &amp; why</li></ul>	<ul style="list-style-type: none"><li>• Information about<ul style="list-style-type: none"><li>• Conditions</li><li>• Insurance</li><li>• Technology</li></ul></li></ul>

Telemedicine: "A video chat with a nurse, physician or therapist" (Online survey)

Users	Interested Non-Users
300	300
Ever used for your own health or a family member's health	Never used but interested and heard about it before
<div>GENERATION/AGE</div> <div>GENDERINCOME</div> <div>RACE/ETHNICITYTYPE OF INSURANCEGEOGRAPHY</div>	

Contact us to arrange a WebEx presentation for you or your team:

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# Implications of this research for health insurers who work with telemedicine?

- It profiles the differences between consumers who are currently using telemedicine and those who are interested – really curious about it -- but not yet using it. How do you convert those interested non-users into users? What would activate them?
- One difference is their source of knowledge.
- Our hypothesis is that hearing about telemedicine from your health system or healthcare provider or your employer helps activate consumers. That's one difference we saw between users and non-users.
- So in addition to direct-to-consumer marketing about telemedicine, for some consumers, we believe it's critical to partner with health systems, providers and employers and engage them to reinforce the message to consumers. That's just one example of the profiling.