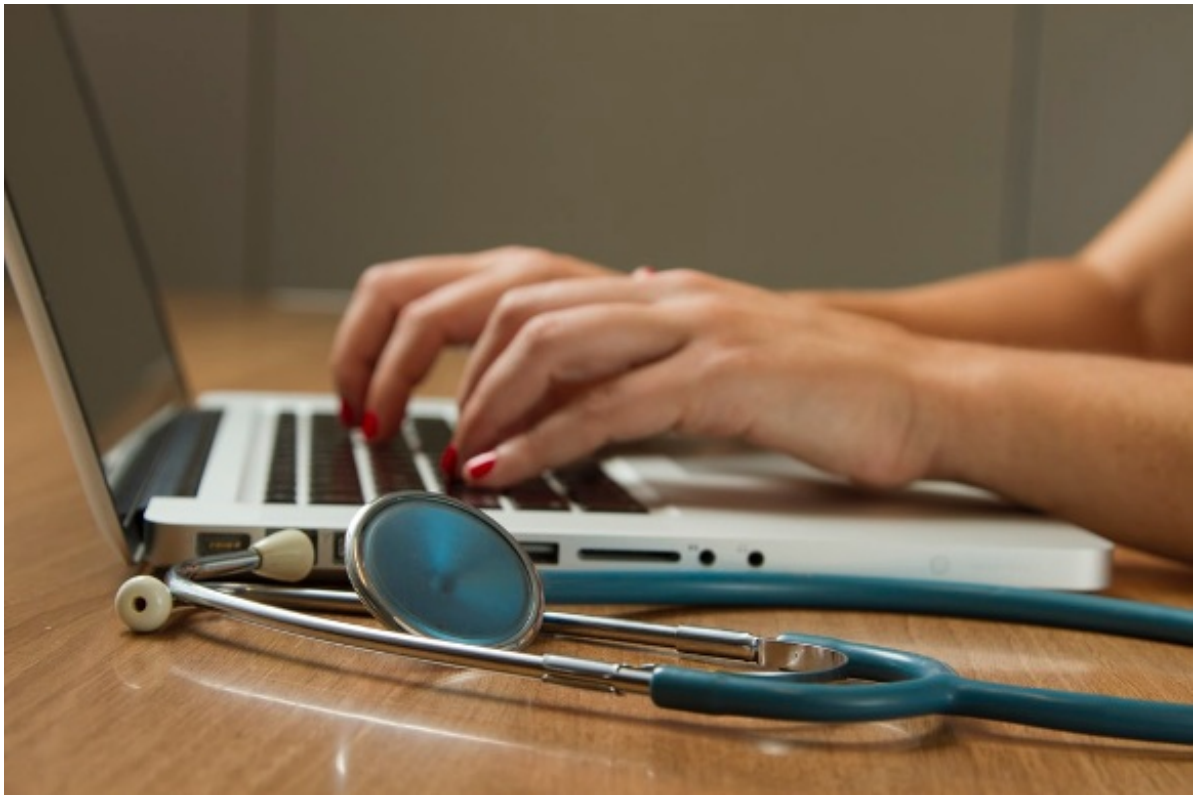
Telehealth: The Coming ‘New Normal’ for Healthcare

theharrispoll.com/telehealth-new-normal-healthcare/



Telehealth has always been in US physicians’ toolkit – but until COVID-19 adoption was relatively slow. In an early-2019 Harris Poll conducted in collaboration with American Well, 66% of Americans were willing to use telehealth – but only 8% had actually done so. Use among the physician community tended toward remote diagnostics and remote monitoring as opposed to more routine patient interactions.

But with COVID-19, everything changed. The pandemic is poised to catapult the use of Telehealth – with usage anticipated to continue as the country starts to re-open and we enter the “new normal”.

Usage is up. Way up. A recent Harris Poll study of US consumers shows that overall use of Telehealth services has doubled; nearly a third (32%) of Americans have now ever tried telehealth, with 15% now using telehealth for the first time during the pandemic.

3 in 10 Americans have used Telehealth Services

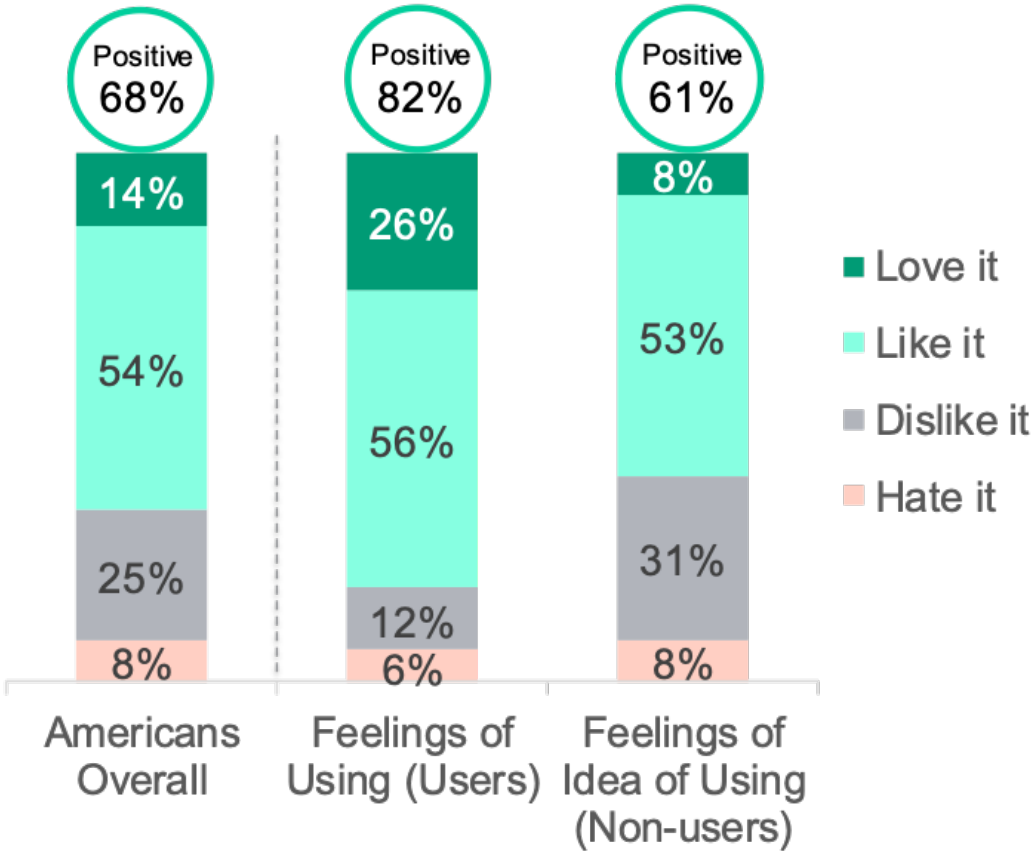


Two in ten (19%) say they have used telehealth since the start of the pandemic – and of those, nearly 4 in 5 (79%) had not used such services prior to COVID-19 (i.e., in the last ~2 months more people have used telehealth than had ever used it before).

While usage (especially during the pandemic) is happening everywhere, the vast majority of telehealth users reside in suburban (44%) and urban (41%) areas (14% of telehealth users reside in rural areas).

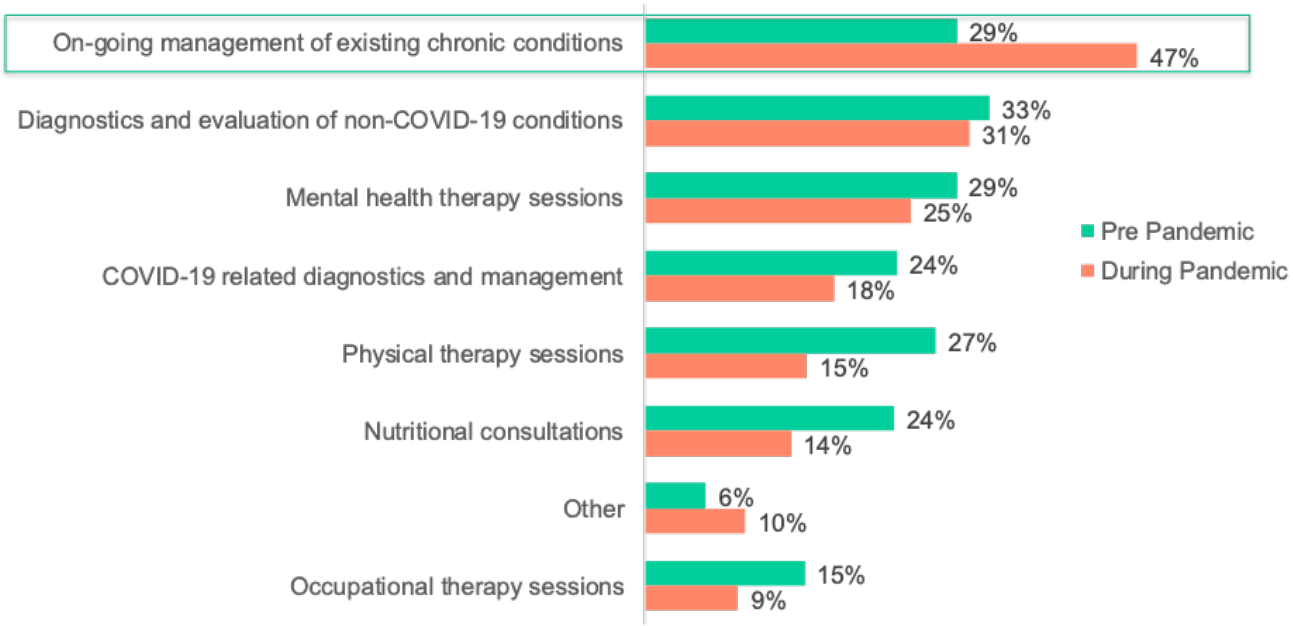
And – it's popular. Over 8 in 10 (82%) of those who have used telehealth services say they love/like it. Even non-users find the *idea* of telehealth services appealing with six in ten (61%) say they like/love the idea of using telehealth services.

Feelings about Using or the Idea of Using Telehealth Services



It's not just for COVID. Telehealth services aren't just for COVID. As the pandemic makes people fearful to go outside, let alone to a doctor's office or hospital, many are turning to telehealth solutions to manage a wide variety of medical issues and concerns.

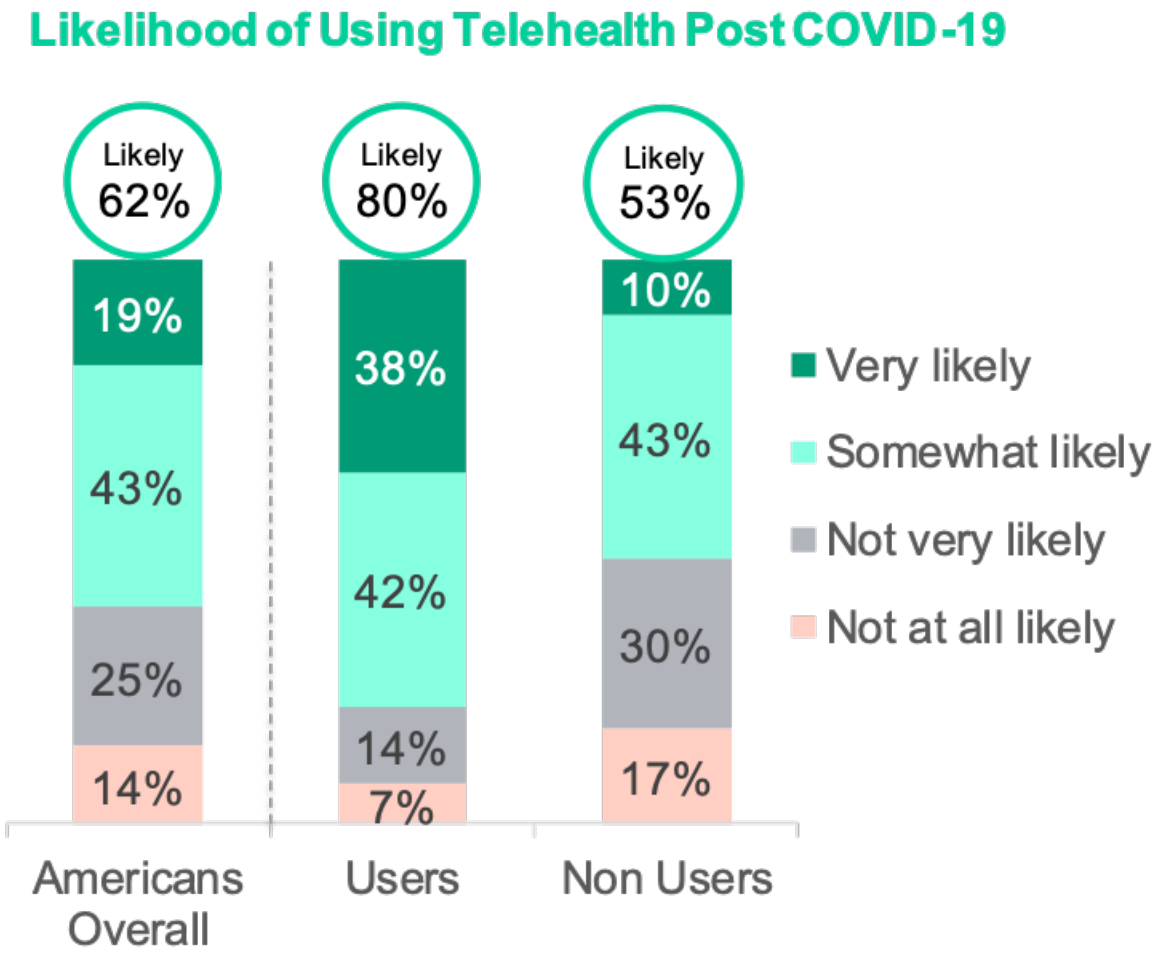
- Prior to the pandemic, about three in ten (29%) telehealth users were using telehealth for ongoing chronic conditions; during the pandemic, chronic care accounts for 47% of use.
- A third have used telehealth for diagnosis and evaluation of non-covid-19 conditions (30%),
- And, a quarter have used telehealth for mental health therapy sessions (26%).
- Two in ten (18%) have used telehealth since the start of the pandemic for COVID-19 related diagnosis and management



Men are more likely to have ever used telehealth services than women; a third of men (37% have used telehealth at some point versus 28% of women) In other COVID-related research we've also observed men "more likely" to engage in behaviors driven by the pandemic (higher levels of fitness subscriptions, use of streaming services, etc.). Time will tell whether these types of differentiated behaviors persist.

Will it last? The future of telehealth looks promising: Satisfaction is high, and the likelihood of continued social distancing for some time means the conditions are right for telehealth to assume its place as a go-to resource for health care.

- Overall, eight in ten of those who have already used telehealth services say they are likely to use post-pandemic.
    - Of those using telehealth *during the pandemic*, three quarters (76%) are very/somewhat likely to continue using these type of services.
    - More than a third (35%) of current telehealth users say they are *very likely* to continue using after the pandemic.
- Even among US adults who have never used telehealth services (non-users), over half (53%) said they would be very/somewhat likely to use telehealth services after COVID-19.



Adoption has likely been eased, not only by public concern about in-person clinic visits during this time but also by easier reimbursement across many major medical plans, more flexible HHS licensing rules allowing out of state physicians to treat patient via telehealth, and waived costs/restrictions associated with COVID testing and telemedicine for a variety of conditions.

And – physicians are glad to offer the service. In a March 2020 article from the AAFP (American Association of Family Physicians), Gina Tobalina offered: " [Patients] are relieved to be able to connect with us and to see our faces," she said. "It offers a lot of reassurance to them. They are worried about us, too, and they are glad to hear that we are OK and up and running. There are no apologies needed as they are so thankful to be able to see and hear us." Telehealth also relieves the strain of not having sufficient PPE to ensure safety during in person visits.

Implications: As things re-open, how can you prepare for the new normal?

- How can providers of telehealth solutions capitalize on current momentum? What changes will be required in the day-to-day workload for clinicians as some of their caseload shifts to a virtual platform?
- How can healthcare providers optimize the "mix" telehealth vs. in-person options for a comprehensive patient-focused solution?
- How (or will) can insurance providers continue to support these offerings?

Methodology

This survey was conducted online within the United States by The Harris Poll from April 27 – 28, 2020 among 2,081 U.S. adults ages 18 and older. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables and subgroup sample sizes, please contact .