

A woman with dark hair, wearing a white headset, is holding a dark-colored tablet computer with both hands. She is looking down at the screen. The background is a blurred indoor setting with a window showing greenery outside. The text "TELEHEALTH INDEX: 2017 CONSUMER SURVEY" is overlaid in blue on the right side of the image.

TELEHEALTH INDEX: 2017 CONSUMER SURVEY



Telehealth Index: 2017 Consumer Survey

American Well's new consumer survey finds a growing vanguard of consumers who are willing to switch doctors in order to get video visits as part of their care. And the majority of consumers are increasingly open to video visits. With the market value of telehealth expected to hit \$36.2 billion by 2020, our survey highlights consumers' desire to use video visits across a range of medical needs.¹ Consumers believe telehealth is effective for managing minor healthcare concerns like refilling prescriptions and for managing complex, ongoing issues like chronic conditions.

American Well commissioned Harris Poll to conduct two online studies among over 4,000 adults. The results are weighted to be representative of the American adult population across standard demographics.

Here's what we found:

1. Consumers are delaying needed care
2. Video visits offer a viable solution
3. Patients are willing to see physicians who offer video visits
4. Consumers see many applications for telehealth

Here, American Well presents the survey findings and explores their implications for the industry.

¹ Telemedicine to attract 7M patient users by 2018, Becker's Hospital Review, Oct. 2016



Consumers are delaying needed care

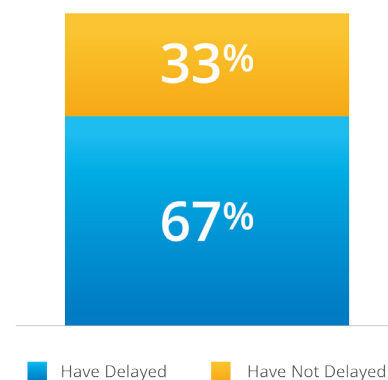
Today, 67 percent of consumers say they have delayed seeking care for a health problem. Americans delay speaking to a doctor or nurse for a variety of reasons.

They delay because:

- It costs too much (23%)
- It takes too long to get in to see a doctor or nurse (23%)
- They thought the problem would go away on its own (36%)
- They are too busy (13%)

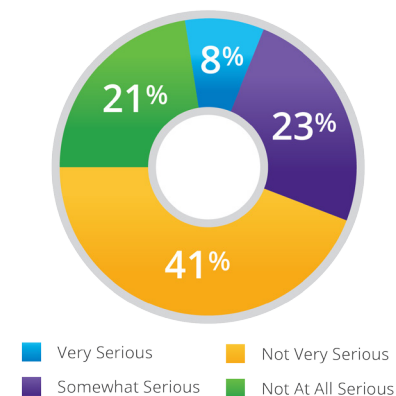
And it's not just minor issues they're delaying. Of those that have delayed seeking care, nearly a third turned out to be facing a serious health issue. Delaying care for serious health concerns can have costly ramifications for the patient and the healthcare provider – with fewer, often far more expensive treatment choices available when diagnosis is delayed. Moreover, by delaying routine care, many consumers miss reminders and doctors' instructions to get preventative exams, vaccinations, or flu shots when they are due. Avoiding routine care for less serious concerns can lead to a patient having more serious issues in the future. And when a consumer doesn't get advice or treatment for a health concern, there can be a significant negative impact on that person's physical and mental health.

Consumers are delaying care



Base: n=2,100

Seriousness of health issues of those who delayed care



Base: Have delayed seeing a doctor or nurse about a health problem, n=1,435

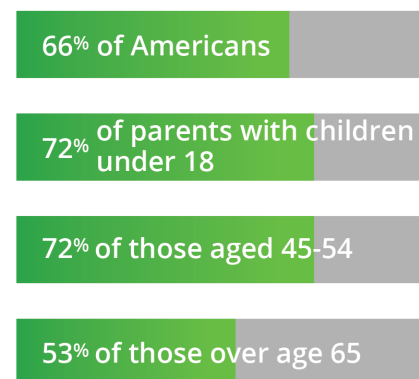
Video visits offer a viable solution

The survey found that two thirds of consumers are willing to see a doctor over video, a trend that's been gradually increasing in recent years.

What is driving this increase in consumer willingness to see a doctor over video? One factor may be the length of time it typically takes to have a brick and mortar doctor's visit. For consumers in a U.S. city, it takes an [average of 18.4 days](#) from the time a patient makes the appointment to get in to see the doctor.² Then, once the patient has the appointment, the [average in-office visit takes 121 minutes](#), with 20 of those minutes spent seeing the doctor and the remaining 101 minutes spent traveling to and from the office and sitting in the waiting room.³ Compare those times to a video visit. [Southwest Medical Associates](#) of Las Vegas found that patients using video visits spend approximately 5 minutes waiting and 8-10 minutes seeing the doctor.⁴ Video visits offer greater convenience, and often at the same or lower co-pay cost, as health plans increasingly cover telehealth as a benefit for members.

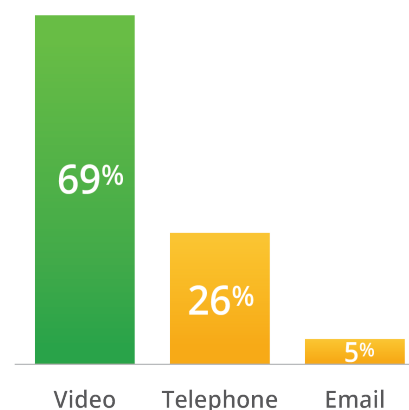
Consumers were asked: if offered the following three options – video, telephone and email – which method results in the most accurate diagnosis by a doctor? 69% of all U.S. adults said that video results in the most accurate diagnosis, versus 26% who said telephone would be, and 5% who said email. Consumers are open to seeing a doctor via video, and they believe it's an effective way to solve their health concerns. U.S. adults reported that their healthcare concerns were completely resolved 64% of the time when in a brick and mortar setting. Data from American Well's telehealth service shows that patients were able to resolve their healthcare needs 85% of the time.⁵ As video visits continue to perform at or above the level of care at a doctor's office, consumer trust in video visits will continue to increase. In fact, the [Southwest Medical group study](#) found that re-visits for the same conditions within two weeks were lower for their telehealth program than for in-person visits at their urgent care facilities.

Who's willing to see a doctor over video?



Base: n=2,100

Consumers' opinion on what method results in the most accurate diagnosis by a doctor



Base: n=2,100

² 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates, Merritt Hawkins

³ Opportunity Costs of Ambulatory Medical Care in the United States, Kristin Ray et al., The American Journal of Managed Care, August 2015

⁴ Southwest Medical Associates Case Study, American Well, October 2016

⁵ American Well Post-visit Amwell Survey, 2016, n=6,644

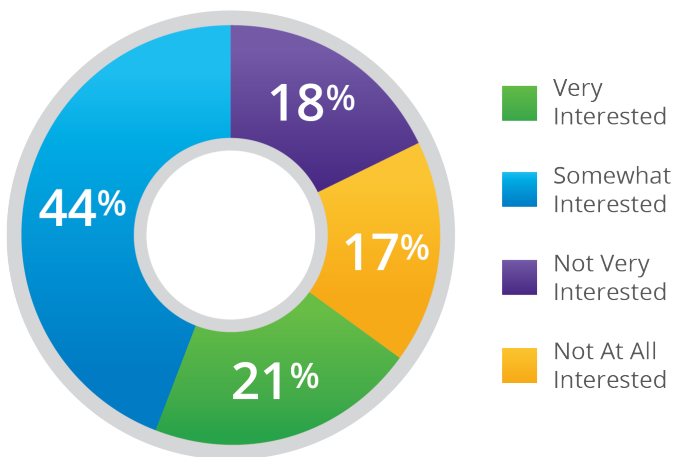


Patients prefer physicians who offer video visits

Consumers want to see their own primary care physician (PCP) via video. Of those that have a PCP, 65% were very or somewhat interested in seeing their PCP over video. American Well believes that consumers trust the doctors they have developed relationships with, and they want to see those doctors offer a service that solves healthcare concerns in a convenient way.

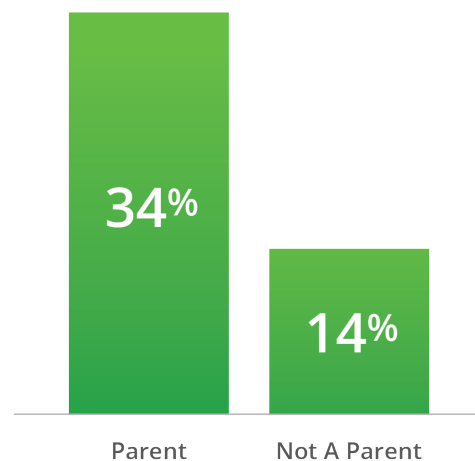
If their PCP does not offer video visits, 20 percent of consumers would switch to a PCP that offered video visits. Willingness to switch doctors to get video visits rises to 26 percent in 18-34 year olds and 34 percent for parents of children under 18. For practices that are looking to recruit new patients and satisfy existing patients, offering video visits can be a valuable tool for enhancing the patient experience.

Consumer interest in seeing their PCP over video



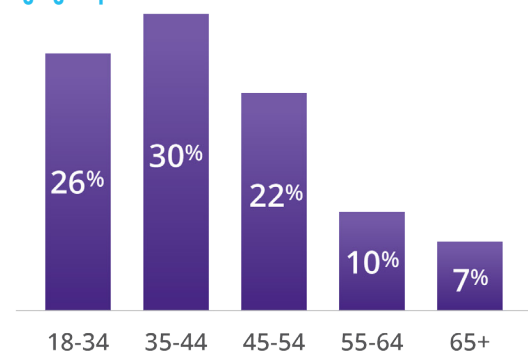
Base: Have a PCP, n=1,739

Parents' and non-parents' willingness to switch PCPs for video visits



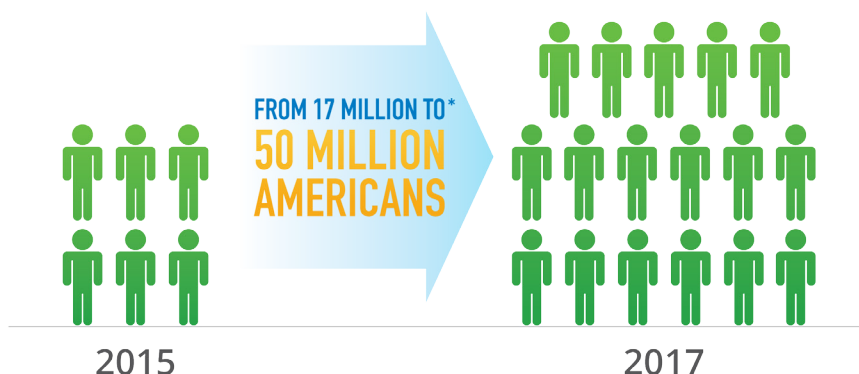
Base: Parents of children under age 18, n=527 & non-parents, n=1,480

Willingness to switch PCPs for video visits across age groups



Base: n=2,007

Willingness of U.S. adults to switch PCPs for video visits



**50 Million Americans
Would Switch PCP to
Get Video Visits***

* Numbers were calculated in the following way: 323M (U.S. Population, U.S. Census Bureau, 2016) x 77% (U.S. Population Age 18+, U.S. Census Bureau, 2016) x 20% (Consumers with a PCP who would switch PCP for video visits, American Well 2017 Consumer Survey) = 50M

318M (U.S. Population, U.S. Census Bureau, 2014) x 77% (U.S. Population Age 18+, U.S. Census Bureau, 2014) x 7% (Consumers with a PCP who would switch PCP for video visits, American Well 2015 Consumer Survey) = 17M

Consumers see many applications for telehealth

Chronic condition care

According to the survey, 60% of those who would be willing to have online video visits with a doctor would want this for regular check-ins to manage a chronic condition. Today, 1 in 2 U.S. adults have a chronic condition such as diabetes or heart disease.⁶ Consider the high cost of treating chronic conditions and it's easy to see how telehealth could have a significant impact on solving this challenge. Because it can be time-consuming and costly for a patient to adhere to a treatment regimen for a chronic condition, telehealth has the potential to encourage more frequent visits and allow doctors, specialists and coaches to make adjustments that improve quality of life.

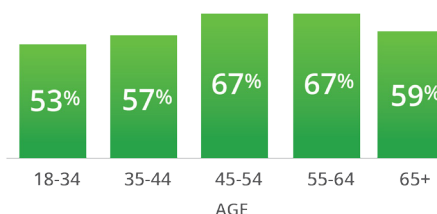
Post-surgical or hospital stay follow-up

Studies show that 15-25% of people discharged from the hospital will be readmitted within 30 days or less and many of these readmissions are preventable.⁷ 52 percent of adults willing to have online video visits with a doctor said they would be open to completing post-surgical follow-up visits or hospital discharge through video. Follow-up visits involve checking in on the physical and mental health of the patient and addressing concerns immediately. If telehealth can improve the rate of adherence to completing these visits, it can have a big impact on the patient's health.

Middle of the night care

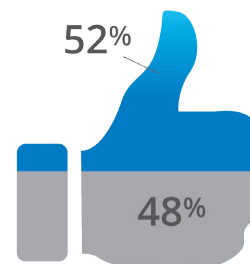
When faced with a medical issue like a high fever in the middle of the night, 20 percent of Americans would like to seek care through a video visit with a doctor. Consumers have not abandoned the ER, but they are increasingly open to alternative options that don't involve the hassle of driving to an ER and sitting for hours in a waiting room – or the cost of a \$50 or \$100 co-pay, not to mention charges for the uninsured that can run to \$1,000 or more for an ER visit for even a minor condition.

Consumers willing to use video visits to manage a chronic condition



Base: Very/somewhat willing to have an online video visit with a doctor, n=1,376

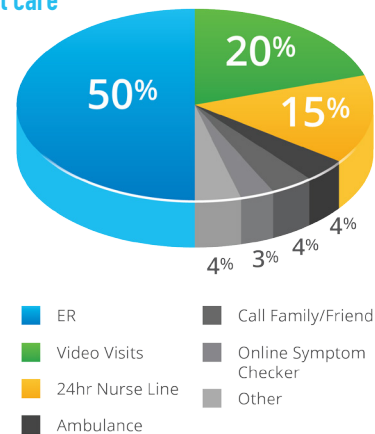
Consumers interested in using video visits for post-surgical or hospital stay follow-up



Interested Not Interested

Base: Very/somewhat willing to have an online video visit with a doctor, n=1,376

Consumers' preference for middle of the night care

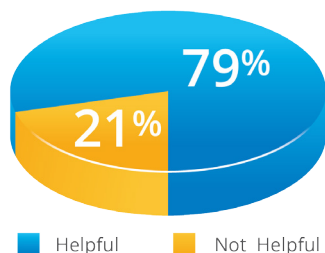


Base: n=2,100

⁶ Telehealth Primer: Chronic Care Management, The Advisory Board Company, September 2015

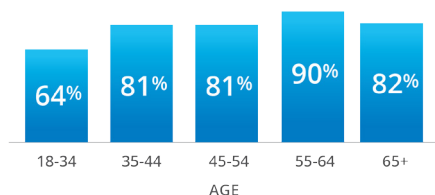
⁷ Reducing Hospital Readmissions, Center for Healthcare Quality & Payment Reform, 2010

Consumers with ill or aging relatives find video visits helpful in coordinating care



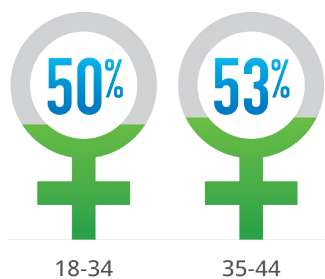
Base: Currently caring for an ill or aging relative, n=199

Consumers interested in prescription refills via video visit with their doctor



Base: Very/somewhat willing to have an online video visit with a doctor, n=1,376

Women interested in getting birth control with their doctor over video visits



Base: Very/somewhat willing to have an online video visit with a doctor, female age 18-44, n=612

Elderly care

Today, approximately 22 million Americans care for an ill or aging relative.⁸ 79 percent of those who are currently caring for an ill/aging parent or relative would find video visits helpful for caring for their parent or relative so they can be more involved and present for the care of their elderly relatives. American Well's multiway video capability allows for people other than just the patient and provider to be part of a video visit, such as a caregiver or physician specialist, thus staying more informed of the patient's care.

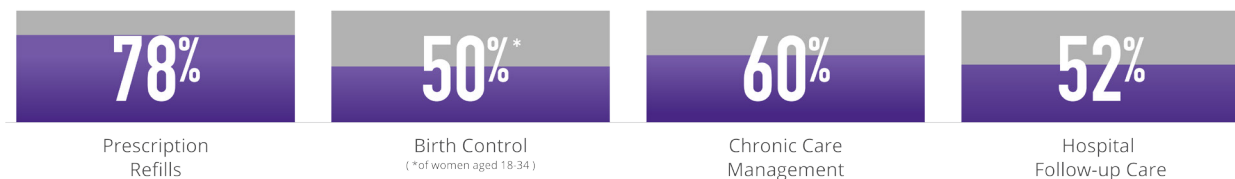
Prescription refills

The average wait time to get in and see a doctor is almost 20 days.⁹ A consumer who needs a prescription refilled now does not have 20 days to wait for an appointment that could likely be completed via video. 78 percent of those willing to have a video visit with a doctor want to see their PCP via video to get prescriptions refilled. For a minor routine need like a prescription refill, those willing to see a doctor via video trust a video visit.

Birth control

Of those willing to have a video visit with a doctor, half of women aged 18-34 and over half of women aged 35-44 want to get their birth control over video visits with their physician. Like a prescription refill, getting birth control is often a routine appointment that does not necessarily require a physical exam. For a busy woman who has a recurring need to manage her birth control year after year, a video visit can be the most convenient and effective solution.

Of those willing to have video visits, they want them for...



Base: Very/somewhat willing to have an online video visit with a doctor, n=1,376

⁸ Number was calculated in the following way: 323M (U.S. Population, U.S. Census Bureau, 2016) x 77% (U.S. Population Age 18+, U.S. Census Bureau, 2016) x 9% (Consumers Caring for Ill or Aging Relatives, American Well 2017 Consumer Survey) = 22M

⁹ 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates, Merritt Hawkins

Implications for industry players

As consumers embrace video visits, health systems, health plans and employers must adapt. What follows are American Well's insights on the implications of the survey.

Health Systems

KEY TAKEAWAYS

20% of consumers would switch to a PCP that offers video visits if another PCP in their area offers them.



When faced with a medical issue in the middle of the night, 20% of Americans would like to seek care through a video visit with a doctor.



60% of adults who are willing to have a video visit with a doctor say they would be willing to see a doctor online for regular check-ins to manage a chronic condition.



52% of adults willing to have video visits with a doctor would be open to completing post-surgical follow-up or hospital discharge visits via video.



INSIGHTS

Health systems can retain existing patients or bring new patients into their systems by making telehealth a key part of the primary care offering.

By marketing video visits to patients, health systems can divert resources and costs away from the ER and into lower cost options that deliver higher patient satisfaction.

Health systems should create awareness around telehealth programs designed for diabetes, hypertension and other common chronic conditions. Making consumers aware of these types of programs, while also highlighting complementary services like behavioral telehealth and dietician support, can drive better patient outcomes.

Consumers may be more likely to adhere to physician recommendations if they have video visits with their physician. Physicians should suggest to patients that they do follow-up care via telehealth after a hospital stay, so they can ask questions and feel more in control of recommended follow-up treatment.

Health Plans

KEY TAKEAWAYS

65% of consumers are very or somewhat interested in seeing their PCP over video.



Among those willing to have an online video visit with a doctor, many are willing to use video visits for routine needs like getting prescriptions renewed (78%) or getting birth control (33%).



INSIGHTS

Consumers are likely to be more satisfied with a health plan that offers telehealth as a benefit. By reimbursing physicians for telehealth, health plans can keep their members in network and attract new members, and keep physicians satisfied.

Consumers are interested in finding a way to take care of their routine prescriptions and birth control needs easily. Health plans can lower costs by marketing the availability of appointments via video for prescription refills and routine needs like birth control.

60% of adults who are willing to have a video visit with a doctor would see a doctor online to manage a chronic condition.



Among those willing to have a video visit, a majority considers video visits as an acceptable alternative to in-office visits for chronic care management. Health plans have an opportunity to promote adherence to chronic condition treatment regimens by highlighting the ways that patients can manage conditions from home, lowering health plan costs.

Employers

KEY TAKEAWAYS

Of those willing to have a video visit to see a doctor, many are willing to see a doctor online for urgent care needs such as a fever (39%), getting prescription renewals (78%) or getting birth control (33%).



20% of consumers would prefer to have an immediate live video visit with a doctor for middle of the night care.



79% of those currently caring for an ill/aging relative would find video visits helpful for caring for their parent or relative.



INSIGHTS

Consumers don't want to take time out of work to sit in a waiting room. Employers have the opportunity to reduce unnecessary ER visits and eliminate time off for routine doctor visits, while improving employee satisfaction.

Employers can include video visits for urgent care in their health benefits to employees, reducing ER admissions, improving productivity and decreasing stress.

Employees want new and innovative options to take care of their elderly relatives, while not ignoring their commitment to their jobs. Employers increasingly see the toll that elder care takes on employees, leading to stress and depression and decreasing productivity. By proactively offering multiway video visits, employees can take better care of their elderly loved ones, becoming more productive and happier employees.



Interested in learning more about telehealth? Check out these additional resources.

CASE STUDIES

- [Southwest Medical's Winning Strategy for Telehealth](#)
- [Avera's Move to Consumer Telehealth](#)
- [Ramping up Telehealth: A Health Plan Client Shares Tips for Success Webinar](#)

SURVEYS

- [Telehealth Index: 2016 Employer Benchmark Survey](#)
- [Telehealth Index: 2015 Physician Survey](#)

REFERENCES

- [The Advisory Board Company's Telehealth Primer: Chronic Care Management](#)
- [The American Journal of Managed Care: Opportunity Costs of Ambulatory Medical Care in the United States by Kristen Ray et al.](#)
- [Article: Becker's Hospital Review, "Telemedicine to attract 7M patient users by 2018"](#)
- [Article: Center for Healthcare Quality and Payment Reform, "Reducing Hospital Readmissions"](#)
- [Merritt Hawkins 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates](#)

Methodology: These surveys were conducted online within the United States by Harris Poll on behalf of American Well from August 19-23, 2016 among 2,100 adults ages 18 and older, and from September 28-30, 2016 among 2,007 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.

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