

Virtual Care Engagement:

What Consumers Want

Insights from fully-insured and Medicaid members into their virtual care needs

April 2023

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Introduction and key findings

Introduction

According to Forbes, 90% of employers, payers and benefits consultants see virtual care as a high priority in 2023, and 50% believe that it will become [the primary model of care](#). Today, many healthcare insurers and providers have launched virtual care programs, and yet are struggling to target members, improve adoption, and encourage deeper engagement with virtual care as part of their healthcare plans.

The benefits of virtual healthcare are clear, and [according to Deloitte](#), include improving coordination and continuity of care, and boosting accessibility. When implemented successfully, virtual care models can improve healthcare offerings and even patient outcomes. So, why is engagement lagging, and what would motivate people to adopt and utilize virtual healthcare plans more extensively?

With the clear understanding across the industry that remote care is here to stay, and that it can improve offerings to members, we wanted to understand how healthcare insurers and providers can improve their services in line with member and patient needs. We embarked on this survey to take the pulse of those who have interacted remotely with any healthcare professional in the past 12 months, across both Medicaid and commercially insured patients. What would make them more likely to adopt a virtual care solution? What factors are important to them when choosing a healthcare insurer or provider? Do members feel that they need to choose between quality of care and access to care? This data is extremely valuable in supporting insurers and providers in leveraging virtual healthcare drivers and patient needs in order to maximize success with their own business outcomes.



Methodology

We commissioned a survey of 1,000 consumers across the United States, including those with either Medicaid or who hold private health insurance. All respondents were born between 1967 and 1989, so are currently aged between 34 and 55. We screened for respondents who had interacted with a healthcare professional by phone, video or any other remote healthcare methodology over the past 12 months.

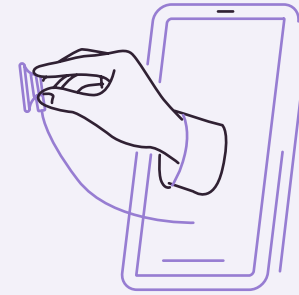
This report was administered online by Global Surveyz Research, a global research firm. The respondents were recruited through a global B2B research panel, invited via email to complete the survey, with all responses collected during the second half of 2022. The average amount of time spent on the survey was 6 minutes and 15 seconds. The answers to the majority of the non-numerical questions were randomized, in order to prevent order bias in the answers.

Key findings

1

78% say virtual care provisions are important when choosing a healthcare plan

Virtual care adoption has declined significantly since the peaks seen during the COVID-19 pandemic, as many people revert back to in-person clinician interactions. However, 78% of respondents consider virtual healthcare offerings to be an important factor when selecting a healthcare plan, with 32% finding it very important and 46% finding it somewhat important. This indicates that people want to have access to virtual healthcare and if it satisfies their requirements for time savings, cost reduction, and emergency support, adoption and engagement with virtual care is likely to increase.



2

Time and cost savings are the top drivers for virtual healthcare adoption

Virtual healthcare adoption is driven by two main factors: time savings and lower costs. Cost is a significant concern for 91% of people when selecting a healthcare plan, and 94% consider time savings to be very or somewhat important. Healthcare insurers and providers can leverage this information to market their virtual healthcare plans to potential members, recognizing that time savings are an important driver, and that it's critical that members feel they are receiving the same level of care if they are asked to spend the same amount of money.



3

A healthcare provider is more likely to influence the use of virtual care than a family member or an insurer

Healthcare providers and clinicians play a crucial role in promoting the adoption and usage of virtual care. Recommendations from family members or friends are only highly effective in motivating 25% of people to adopt virtual care, but a recommendation from a healthcare provider or clinician has a much higher impact, with 59% of people being highly influenced. Additionally, 73% of people state that the availability of virtual exams with their primary care physician would increase their engagement with virtual care.



Key findings continued...

4

Medicaid vs private insurance carriers: Clinician involvement is critical across the board

There is little difference in the importance of clinician involvement between those with private insurance and those with Medicaid. Both groups say the highest impact for choosing virtual healthcare would come from their healthcare provider (53% and 52% respectively), and both say the impact of a recommendation from a family member or friend would be minimal (26% and 24%). The same agreement occurs when we asked about the importance of examination by their own PCP - no matter how people access medical care, they want the same things.

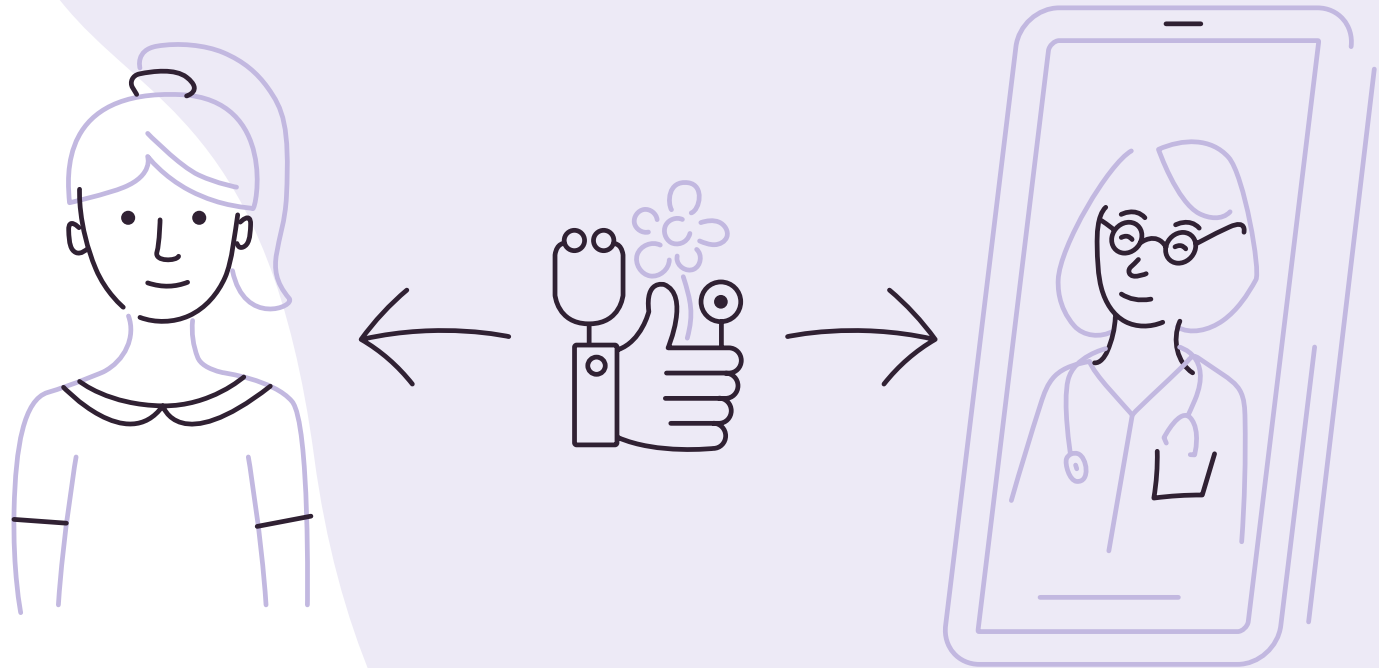


5

90% are willing to forfeit the wait for their PCP to get quicker access to care

Despite a high number of respondents calling out the importance of being examined by their own PCP (31% said this was very important to them, and 42% said this was quite important), when a medical crisis occurs, there is a shift in priorities. More than half of people (51%) are only willing to wait up to an hour to get a medical check, diagnosis and prescription for medication for a loved one such as a child or a parent. In this situation, just 10% say that they would wait as long as it takes in order to see their own primary care physician.





What do members and patients want from virtual care?

73% have joined the virtual care fan club

Key takeaway:

Behavior change is happening. People are using virtual care regularly, and it's becoming a part of their default behavior.

We asked those who have used virtual care over the past year how many times they have interacted with virtual care, whether by phone, internet, or video.

From the data, we can see that those who use virtual care tend to use it frequently. On average, respondents used virtual care 3.5 times last year, with almost three-quarters (73%) of respondents using virtual care twice or more.

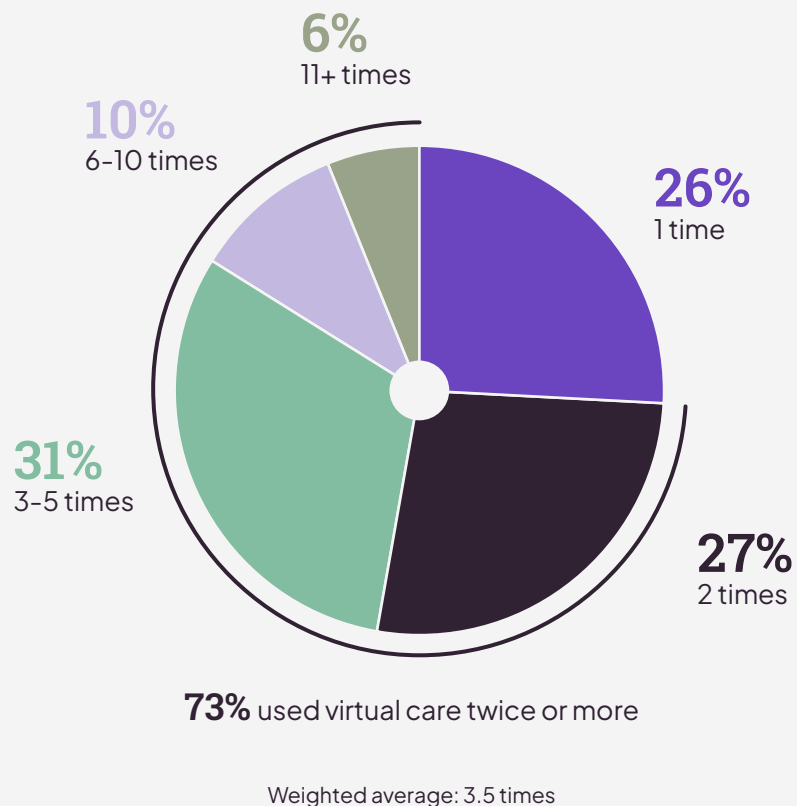


Figure 1: Frequency of using virtual care in the last year

78% think virtual care is a selling point

Key takeaway:

Most respondents see virtual care as an important factor in choosing a healthcare plan - so start leveraging this in your marketing. The more innovative the virtual care program the more attention you'll get, and the higher the potential for member acquisition.

78% indicated that virtual care is important when it comes to choosing their healthcare plan.

We already demonstrated that people tend to go to in-person healthcare clinics (Figure 2). However, there is clearly a drive for the availability of virtual healthcare provisions, which suggests that if virtual healthcare options met their needs, people would adopt and engage with them to a greater extent.

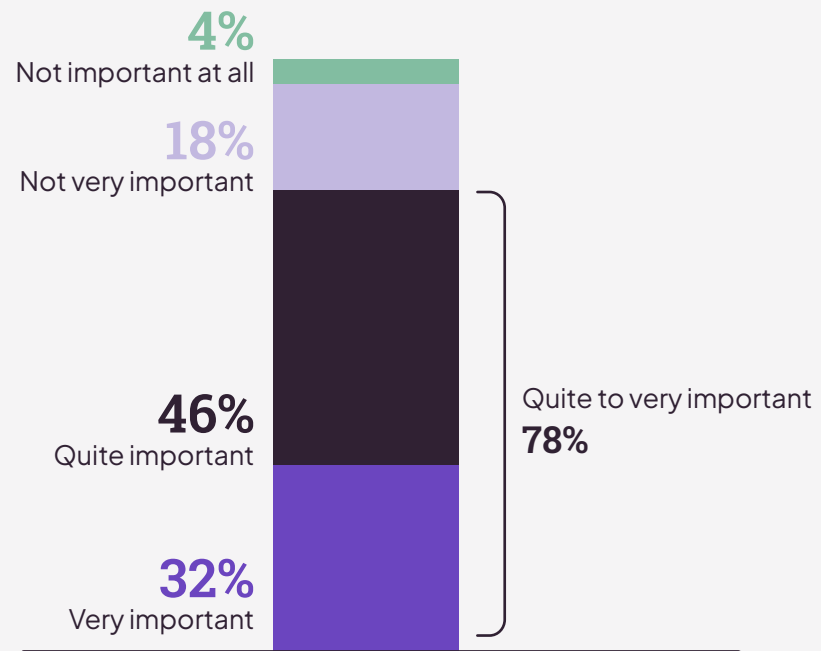


Figure 2: Importance of virtual care provisions when choosing healthcare plan

Including physical devices beyond just video increases adoption

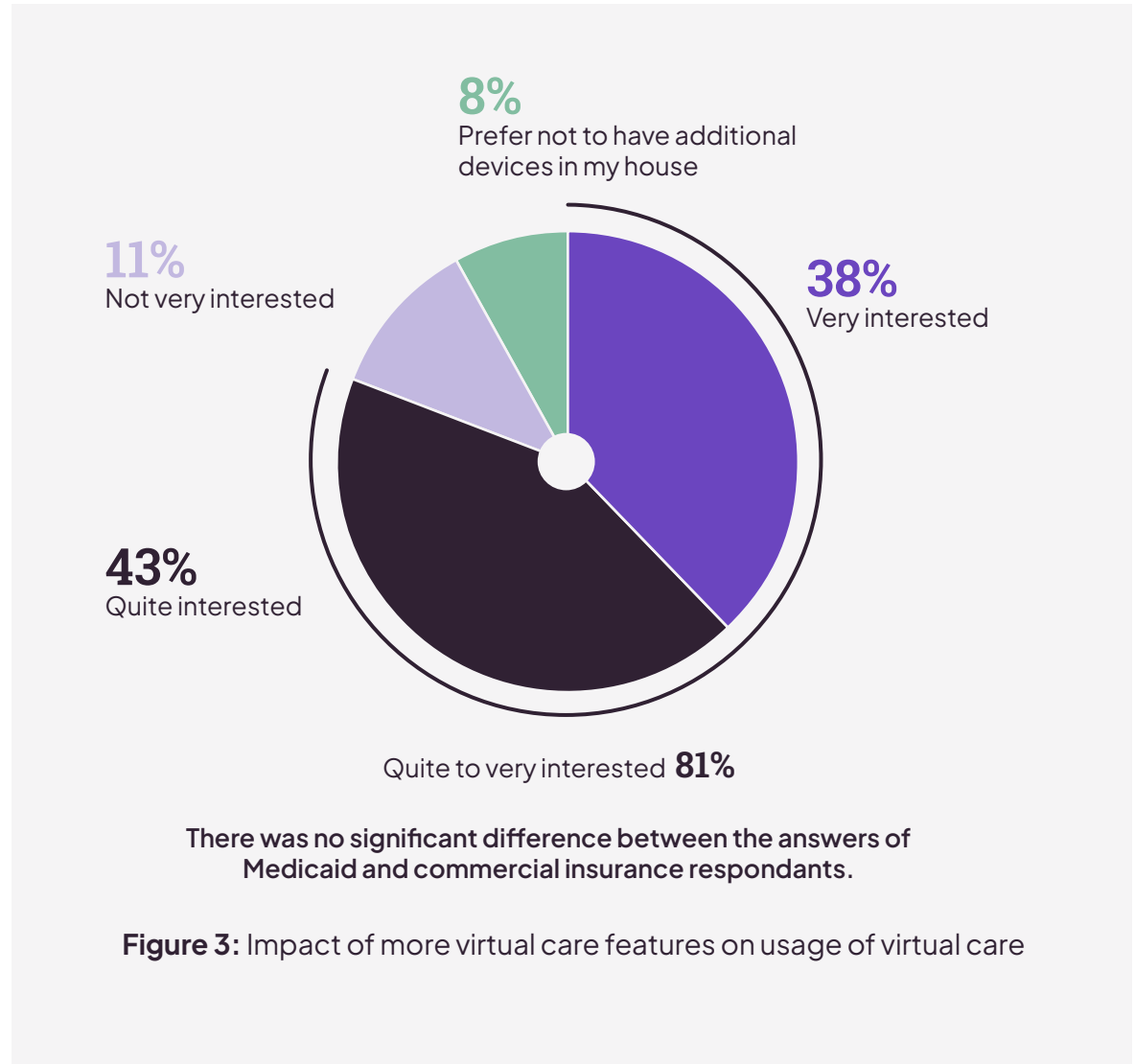
Key takeaway:

No matter the population you're targeting (CFI or Medicaid), most are interested in having a device that takes their virtual care beyond just video.

Would people be more interested in using virtual care programs if they offered features above and beyond simple video calls?

With video and phone, people can connect with their clinician via conversation, but many features of an in-person visit are still missing. Technological advancements provide clinicians with the ability to perform remote examinations, viewing the throat and ears, listening to the lungs and heart, measuring temperatures, and examining skin and abdominal areas, improving the accuracy of diagnoses.

We can see that for better care, with almost no difference by insurance type, 81% of people are happy to use a feature-rich solution that goes further than simple video and audio. 38% would be very interested in this solution, and 43% say they are quite interested.



Time, money, and trusted recommendations are the top drivers for virtual care

Key takeaway:

Virtual care plans which are built around cost savings for members, and communications around the time that could be saved are key ways to increase adoption of your virtual care programs.

There is huge demand for virtual care that will save people time and money. The top drivers for increasing the use of virtual healthcare are the time it could save (36%), lower costs (21%), and receiving recommendations from someone they trust (17%).

Understanding how critical time savings are for patients and members is an important value-add for today's insurers and providers who can put focus on offerings that add efficiency to virtual healthcare for their users.

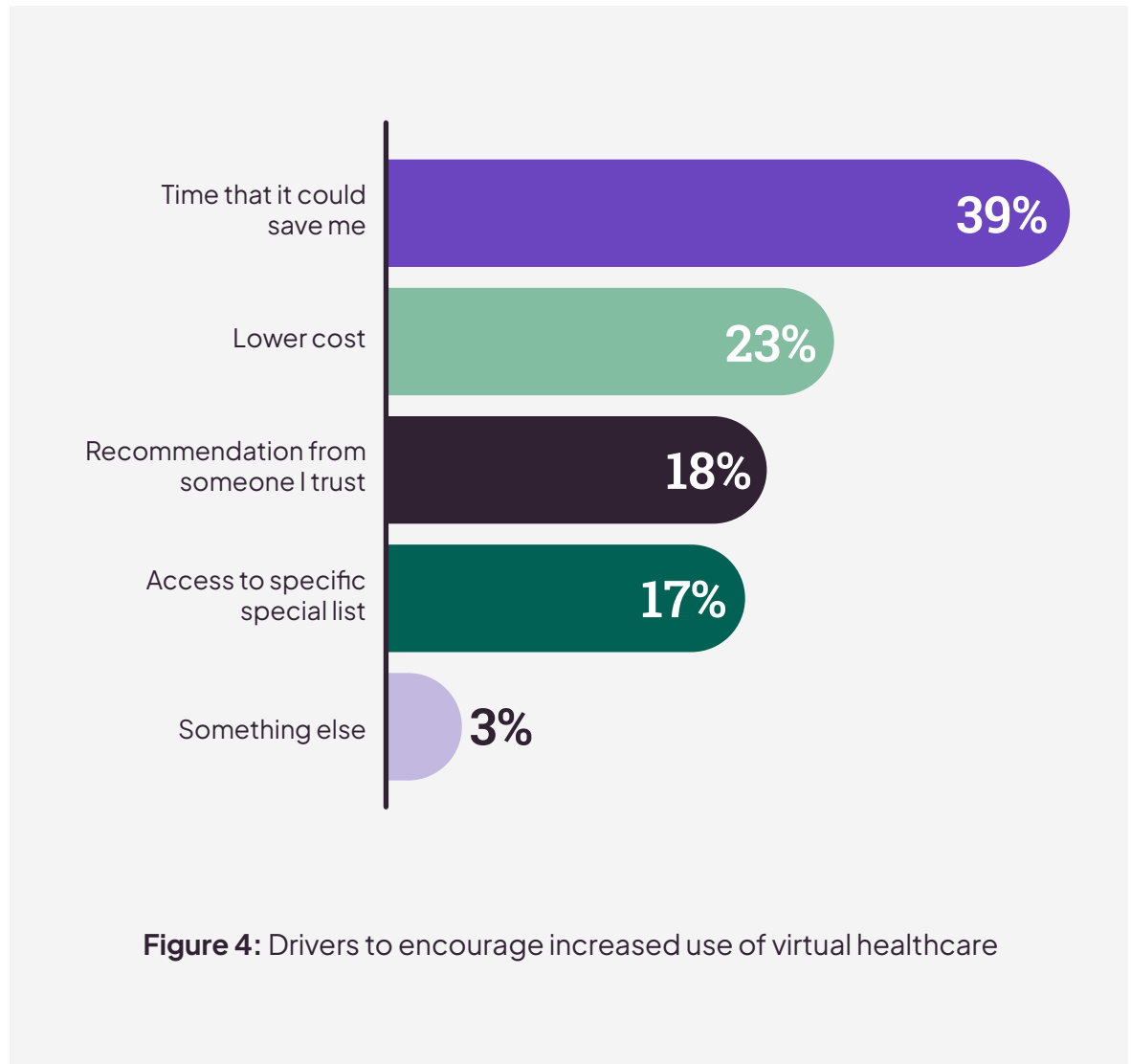


Figure 4: Drivers to encourage increased use of virtual healthcare

94% consider time savings to be a factor when choosing virtual care

Key takeaway:

Leverage time savings as a key marketing message to your audiences.

The importance of saving time is emphasized by 94% of respondents, who considered reducing the amount of time wasted as either quite important or very important in their decision to use virtual care. Only 1% considered time savings to be unimportant in their decision-making process.

People are spending too long accessing basic healthcare appointments. Our [2022 Virtual Healthcare Adoption Survey Report](#) found that on average, people are waiting for 82 minutes once they arrive at the clinician's waiting room. This doesn't account for additional time spent traveling to the clinic, which could involve waiting for public transport or walking a great distance.

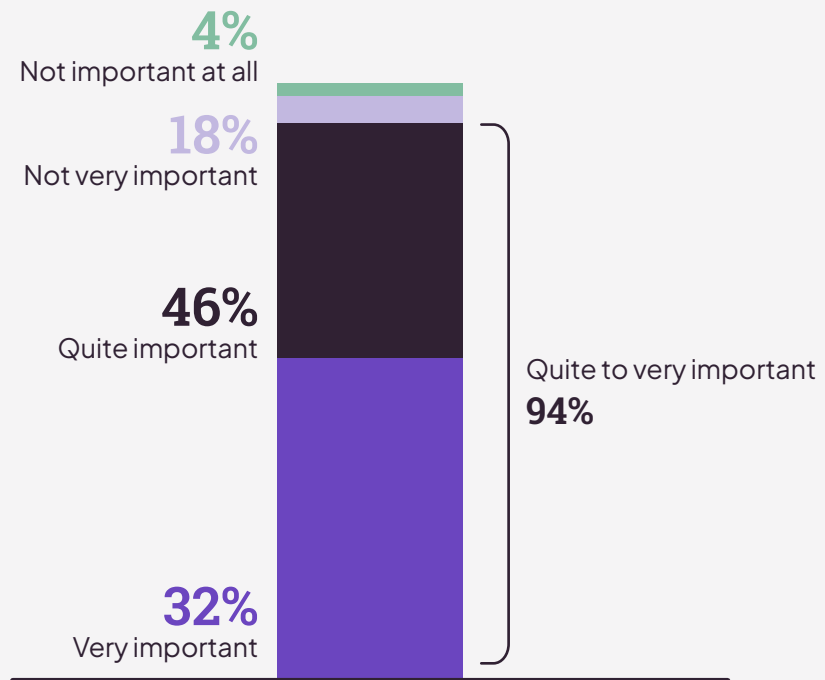


Figure 5: Importance of wasting less time when deciding on usage of a virtual care plan

No one wants more ED visits

Key takeaway:

There's full alignment here between payer, health systems, and member goals. Staying out of the emergency department is a common goal that virtual care helps achieve.

We asked how important it is for members to reduce visits to the ED or urgent care when deciding whether or not to use a virtual care plan. 95% said that reducing ED visits is either quite important or very important.

People want virtual care that will keep them out of the ED. Going to the ED is an unpleasant experience, and a poor use of time. For the health plan, ED visits come at high cost. For healthcare providers, reducing ED visits is also critical, due to limited staff and bandwidth.

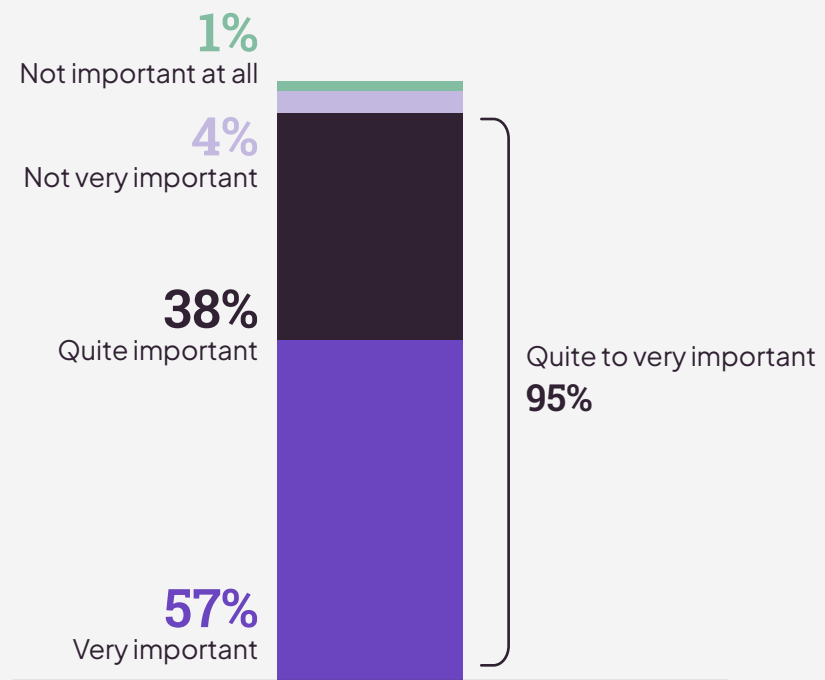


Figure 6: Importance of reducing ED visits when deciding on usage of a virtual care plan

Cost is a factor for **91%** of respondents

Key takeaway:

We all know that cost is important. This shows us the degree to which it's a decision making factor for members.

91% said price is an important factor when choosing a healthcare plan, and we saw no difference between those on Medicaid, and those with private healthcare options.

Choosing between virtual care and in-person healthcare options can have cost implications for many people. It's important for healthcare providers to be clear about what people are paying for, and communicate that members' financial status is being taken into consideration.

For those who would opt out of virtual care if it were more expensive, healthcare insurers could include the cost of virtual care in their plans, or offer virtual care without a heavy additional fee.

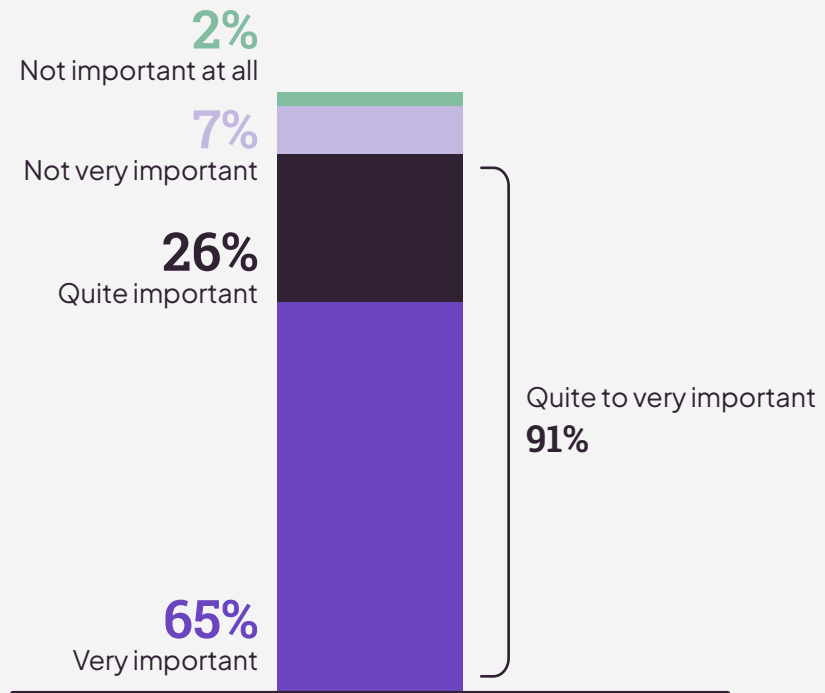


Figure 7: Importance of cost when choosing healthcare plan



Who influences your members and patients?

And the virtual care influencer award goes to...

Key takeaway:

Members trust the advice of healthcare professionals the most. Using a healthcare professional from your network as the 'face' of your virtual care campaigns, and promoting the virtual care program to members through their care providers will increase chances of adoption.

What is the most effective way to communicate to people that they should go virtual when looking for medical care?

Our survey results indicate that the most influential persona in deciding to use virtual care is a healthcare provider or clinician. 53% of respondents would be highly impacted by this, while only 3% said it would have no impact. The influence of a healthcare provider is more powerful than a recommendation from a friend or family member, which would only be highly impactful for 25% of respondents.

The data in Figure 8 shows that there is no significant difference between respondents with Medicaid or private insurance, indicating that regardless of insurance type, the opinion of a clinician is held in high regard.

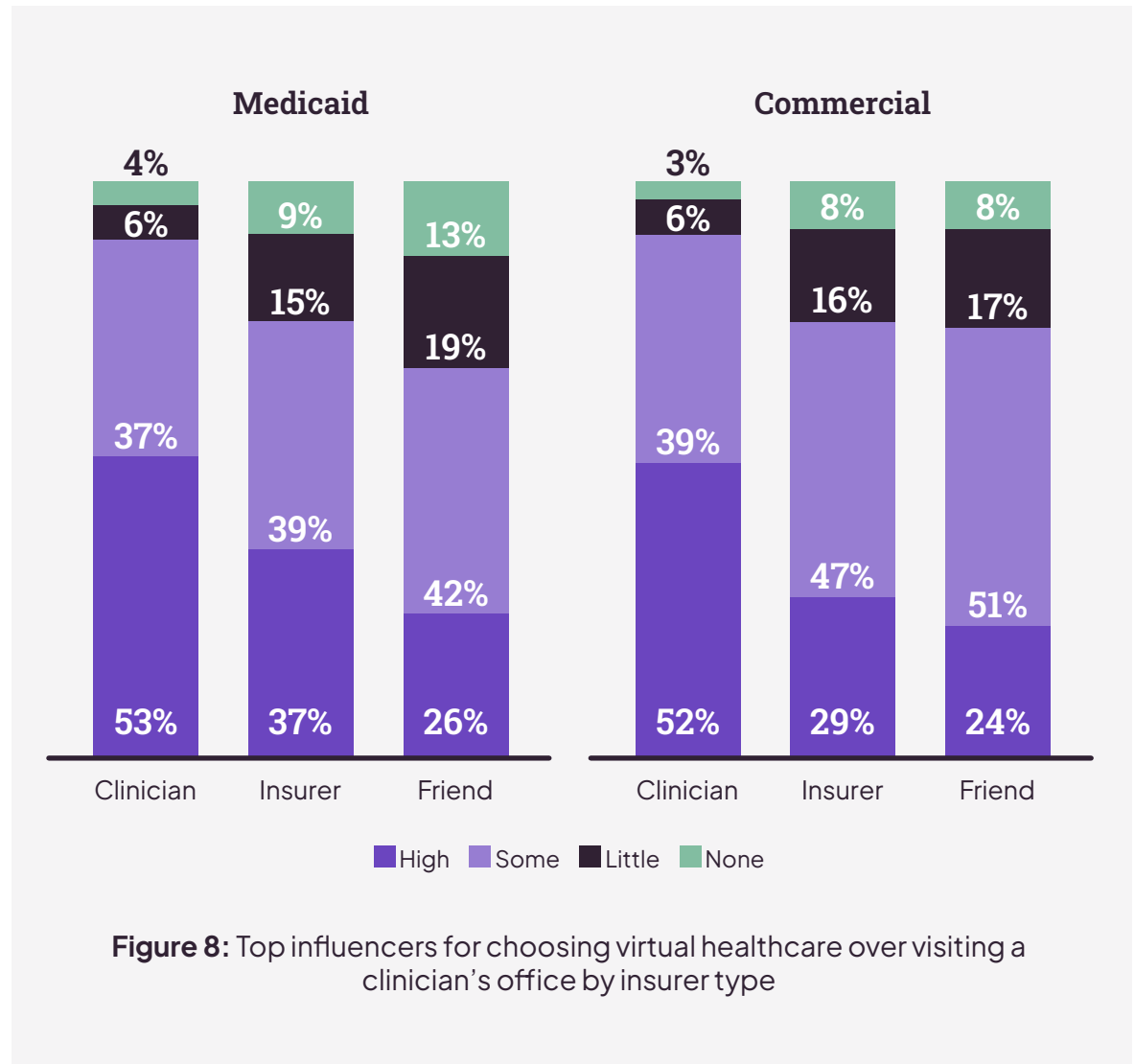


Figure 8: Top influencers for choosing virtual healthcare over visiting a clinician's office by insurer type

73% want to connect with their own doctor

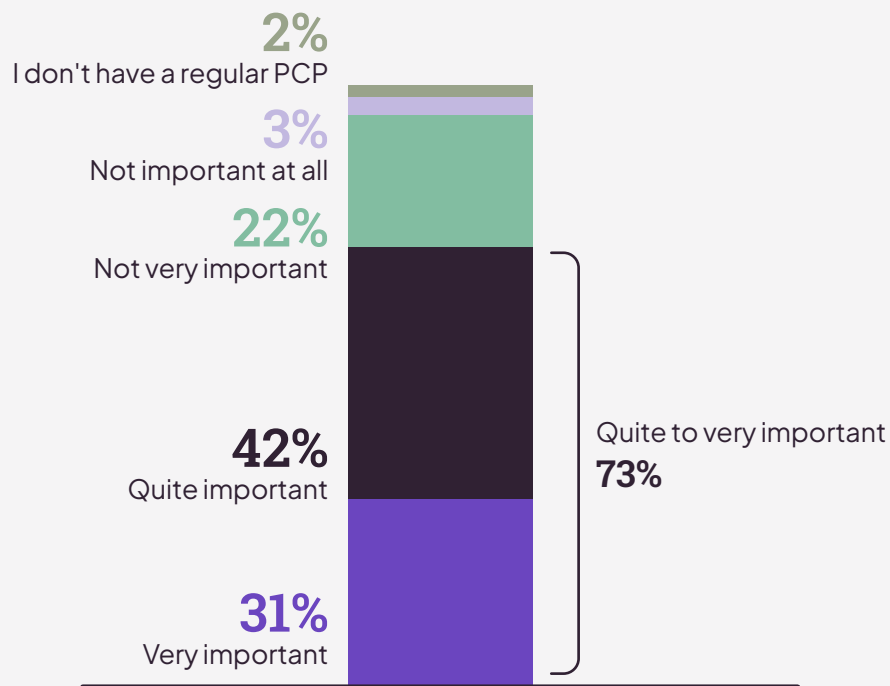
Key takeaway:

Enabling members to see their regular PCP virtually, rather than a PCP that they do not know, will encourage virtual care adoption and utilization.

When participating in virtual care from home, 73% of respondents say that it is important that they are seen by their regular PCP.

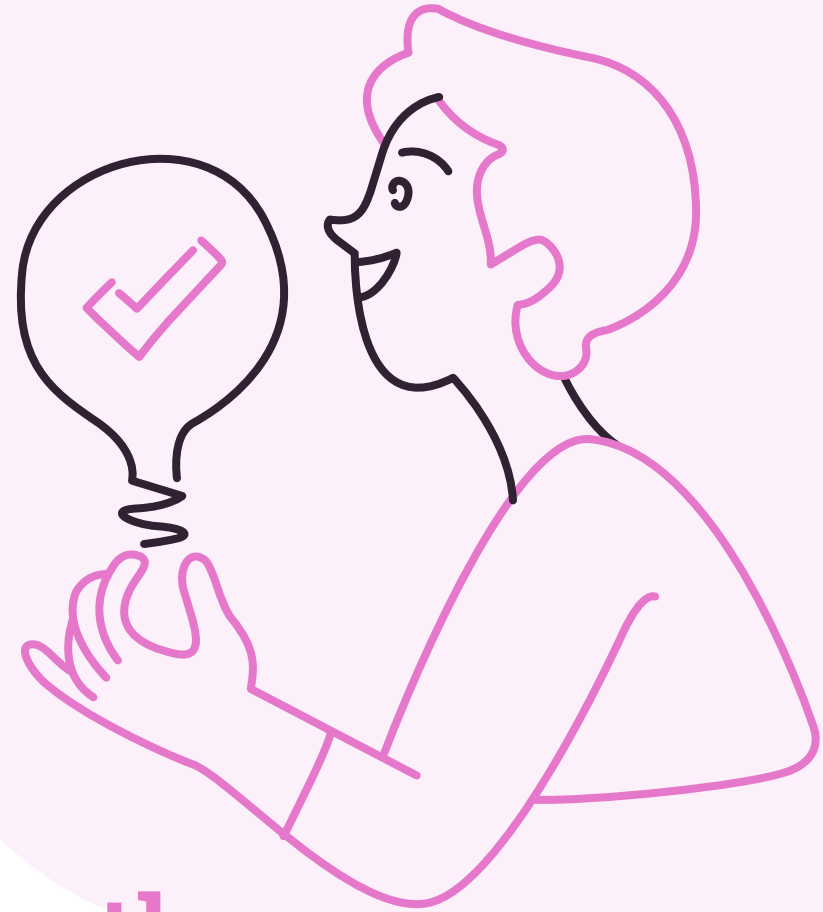
This uncovers an interesting pain point for virtual care – many people may be concerned that they will be unable to interact with their regular PCP if they choose a virtual visit over an in-person healthcare visit.

Virtual care that facilitates people’s ability to see their regular PCP will be a key factor in encouraging adoption. This is true both for those with Medicaid and those with private insurance. It may even heavily impact the success of the virtual care program as a whole.



The data shows a 2% change across Medicaid and private insurance members.

Figure 9: Importance of being examined by regular PCP during virtual care programs



Virtual care across the primary care spectrum

Immediate access to healthcare is key for patients

Key takeaway:

Use immediate access to care as a key selling point for your virtual care program. Highlighting this in your marketing communications will encourage adoption.

If a loved one is feeling unwell, how long are individuals willing to wait to have them checked, and to obtain a diagnosis and prescription?

51% are only willing to wait up to an hour, and 76% are only willing to wait up to two hours. The majority of people won't wait longer than this, inevitably leading to unnecessary urgent care and ER visits. Just 10% will wait until their own PCP is available.

Despite 73% of people saying it is important for them to be seen by their PCP, (Figure 10), this falls by the wayside when they need access to care and want answers.

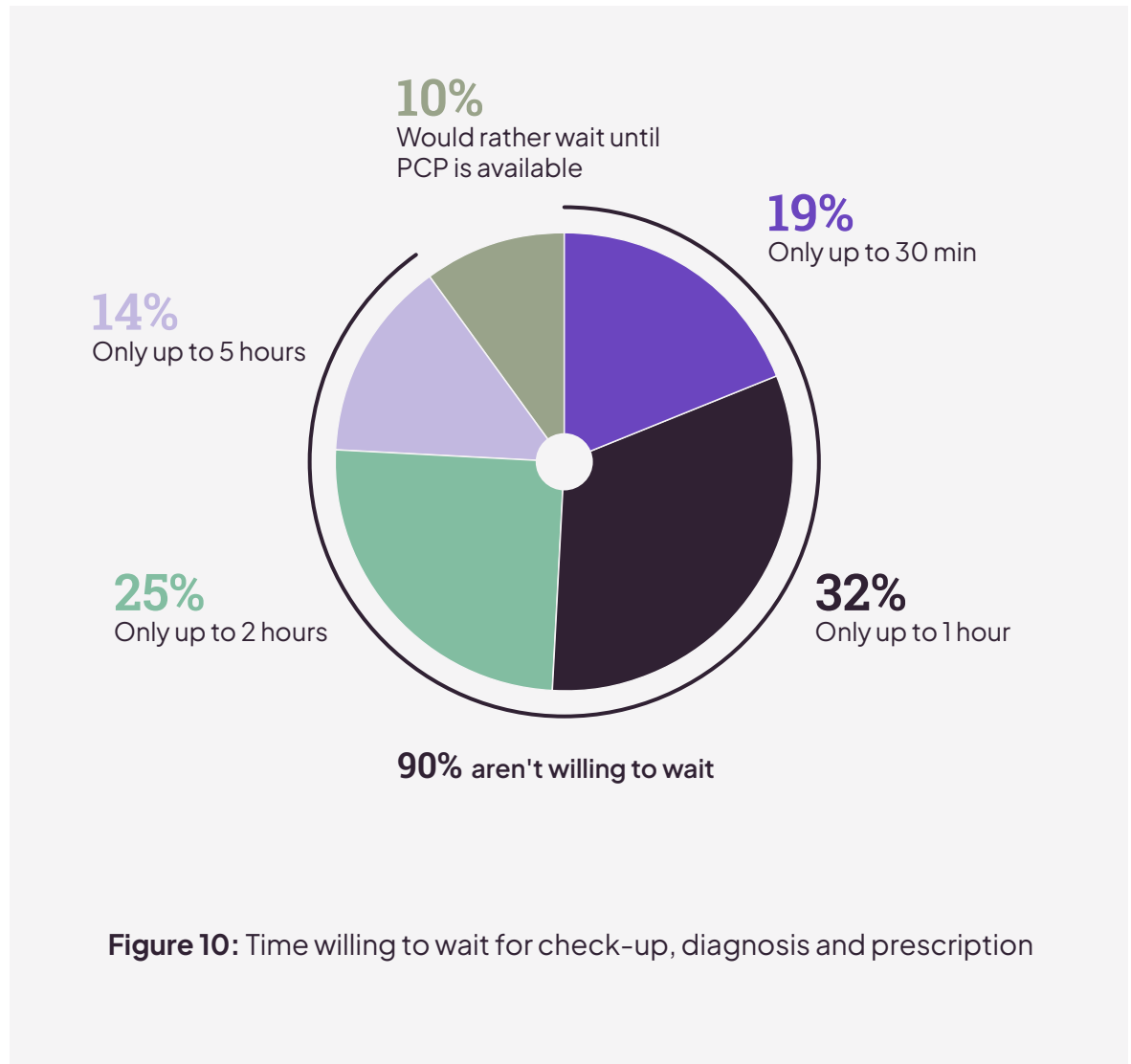


Figure 10: Time willing to wait for check-up, diagnosis and prescription

Everyone wants ease of use from virtual care

Key takeaway:

Invest in making the virtual care experience easy and accessible for your members. Ensure that the virtual care technology that you use is user-friendly, even for those who aren't tech savvy.

97% said ease of use is an important factor when choosing a healthcare plan.

As important as price is when choosing a healthcare plan, (91% in Figure 11), ease of use is even more important for today's members.

This highlights the significance of making virtual care user-friendly and accessible for all members, especially those who are not tech-savvy. Healthcare providers need to prioritize the simplicity of virtual care to make it accessible for people, many of whom are at their most vulnerable.

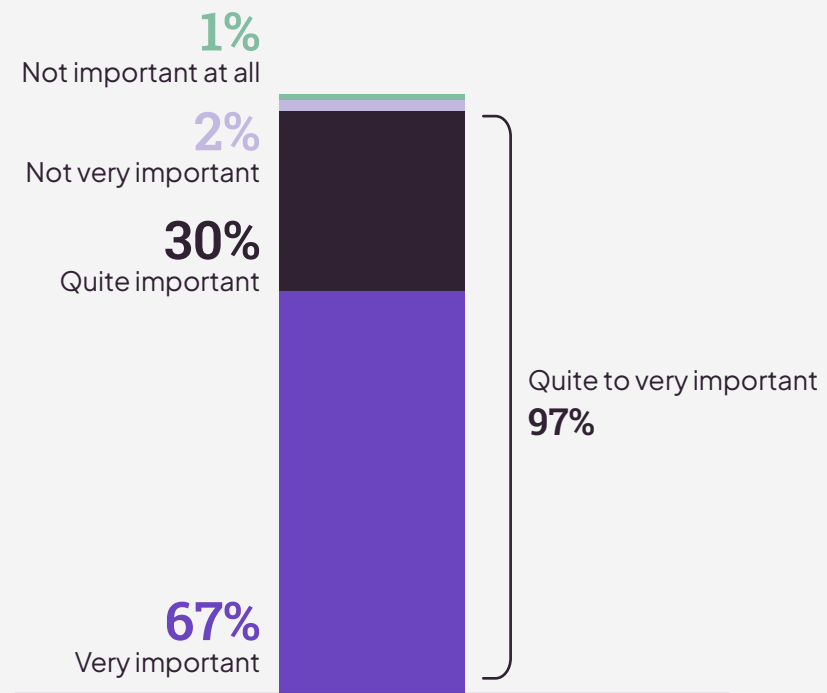


Figure 11: Importance of ease of use when choosing a healthcare plan

Over 80% consider monitoring health changes to be important

Key takeaway:

People want help monitoring chronic care conditions. Virtual care solutions that incorporate remote medical examinations are a simple and scalable way for people to monitor their health.

Monitoring health changes is considered important by a majority of people, both for themselves and their families. 80% rated it as important when considering their own health changes and 82% rated it as important for their family's health changes. People are significantly interested in any additional help they can get when monitoring chronic care conditions from home.

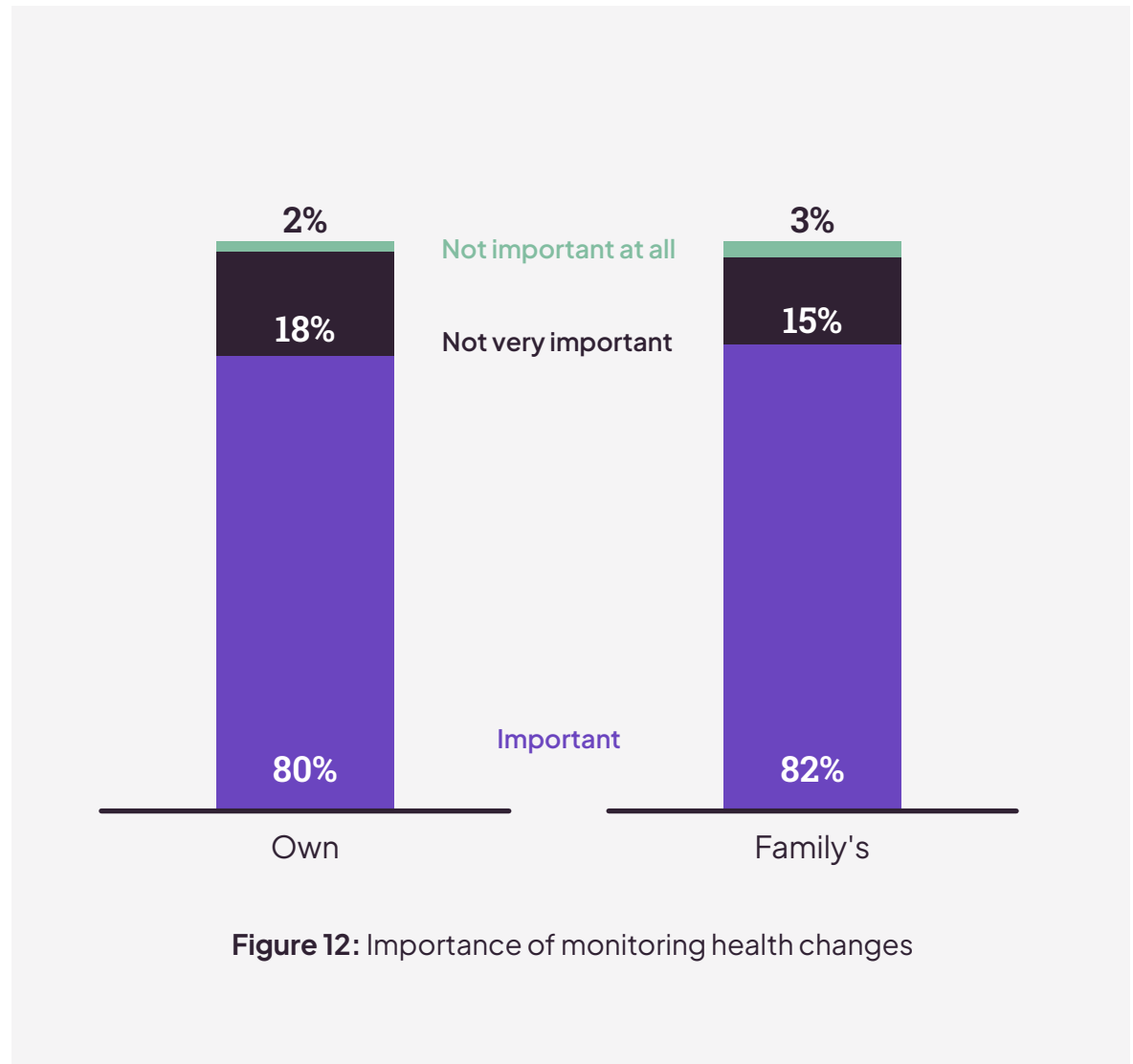
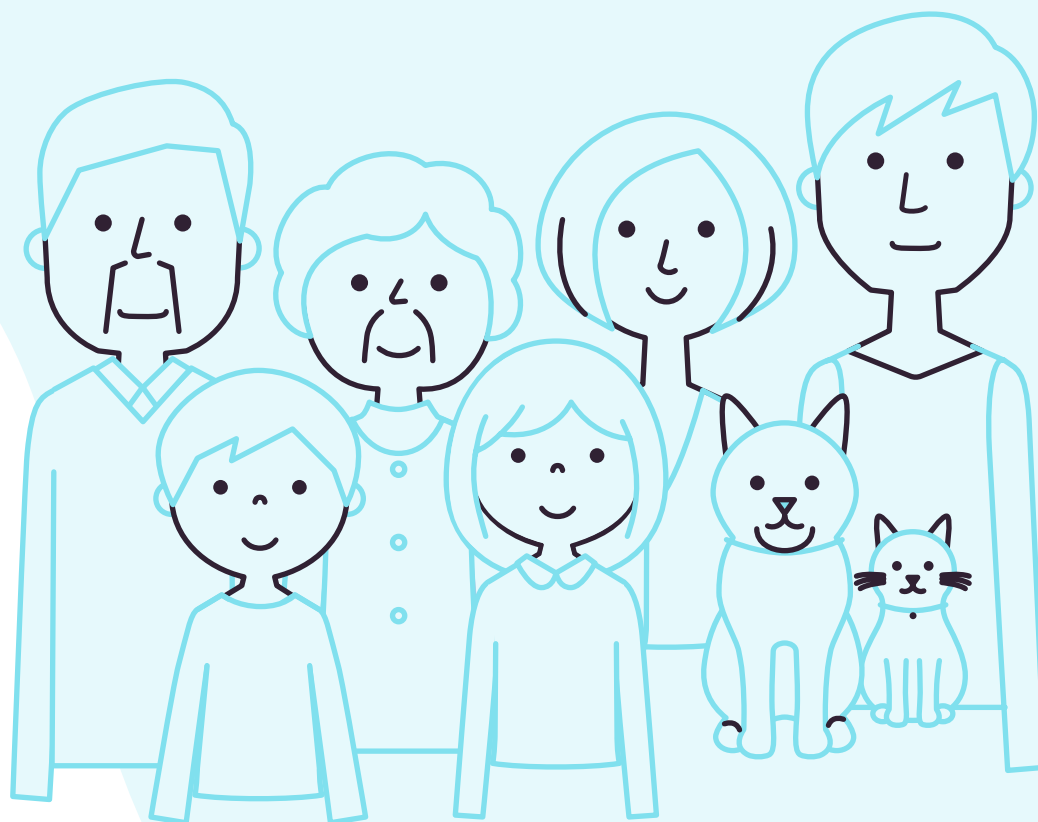


Figure 12: Importance of monitoring health changes



Demographics

Age, region, health insurance and more

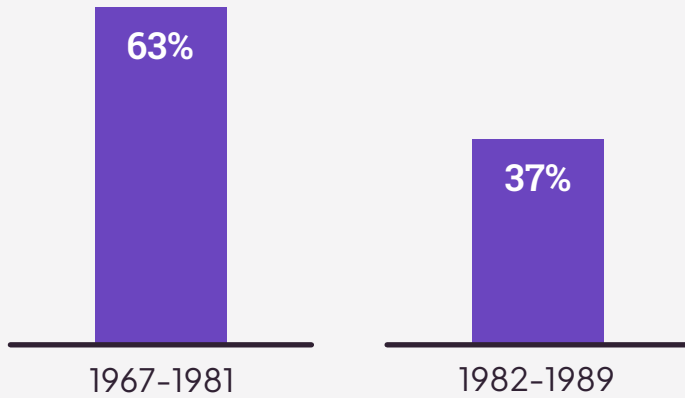


Figure 13: Year of birth

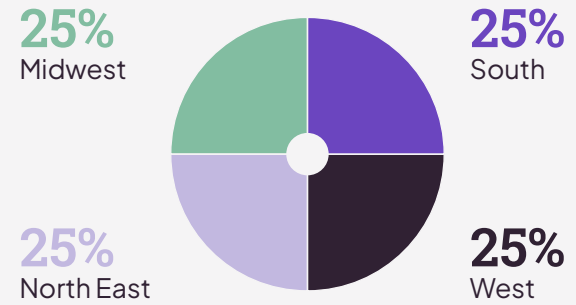


Figure 14: Region

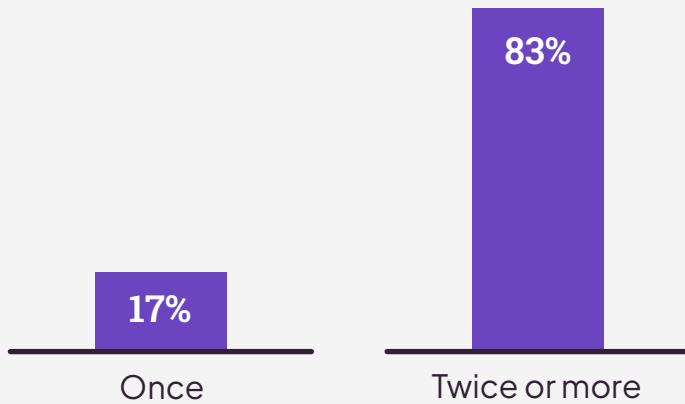


Figure 15: Healthcare consultation, last 12 months

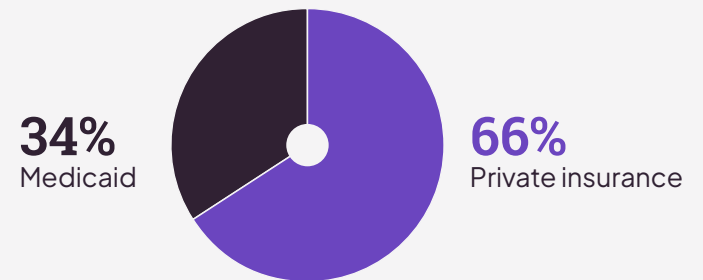


Figure 16: Health insurance



About TytoCare

TytoCare works with leading health plans and providers to roll out Home Smart Clinic solutions that enable accessible, high-quality primary care from home, with no compromises. The Home Smart Clinic solutions include remote physical exams that work across primary care modalities, and can be tailored to any cohort or population. Together with Tyto Insights™ AI-powered guidance, provider integrations, and Tyto Engagement Labs™ which include member journeys and engagement frameworks, Home Smart Clinic solutions ensure more equitable access to care across the globe, and enable healthcare organizations to meet their KPIs. TytoCare's solutions resolve 59% more conditions than audio and video telehealth solutions, and reduce the cost of care by 10-20%. Co-founded by Dedi Gilad and Ofer Tzadik in 2012, TytoCare has FDA and CE clearances and partners with over 220 major health systems, health plans, and strategic partners in the US, Europe, Asia, Latin America, and Israel.