GLOBAL CONSUMER TRENDS

COVID-19 EDITION | **THE NEW NORMAL**

TELEMEDICINE: HERE TO STAY?

dynata™

As many governments and businesses consider reopening and we settle into our COVID-19-influenced world, Dynata has been surveying consumers across the globe to discover changing trends in spending habits, political and social attitudes, entertainment choices, and other indicators, exploring which of these changed trends might be temporary, and which could become permanent. In this brief, *Telemedicine: Here to Stay?*, we draw from two of our survey reports – our *Global Consumer Trends COVID-19 Edition: The New Normal* and the *COVID-19 Healthcare Insider Report Series* – to explore the advent of telemedicine during the pandemic as an aspect of the New Normal, examining it from the perspective of both consumers and healthcare professionals, looking at:

- **How often is telemedicine being used?**
- **How satisfactory has the experience been?**
- **And what could this mean for telemedicine usage in the future – and potential implications for hospitals and health clinics, insurance companies and healthcare IT providers?**

EXECUTIVE SUMMARY

During the COVID-19 pandemic, it's likely that you – or someone you know – has consulted with a physician or healthcare professional, either for a regular check-up or a Coronavirus-related matter. But with social restrictions in place that have many of us unable or unwilling to leave our homes, "going to the doctor" is now a virtual experience, done over the phone or video chat. It's called telemedicine, and – while previously available – has gotten a boost during the pandemic, with many people using it for the first time and reporting a satisfactory experience. But do healthcare professionals feel the same? And will telemedicine maintain that popularity after the pandemic is over?

In looking at our findings, there are three indicators that offer clues to telemedicine's potential staying power:

TELEMEDICINE IS BEING USED WIDELY DURING THE PANDEMIC

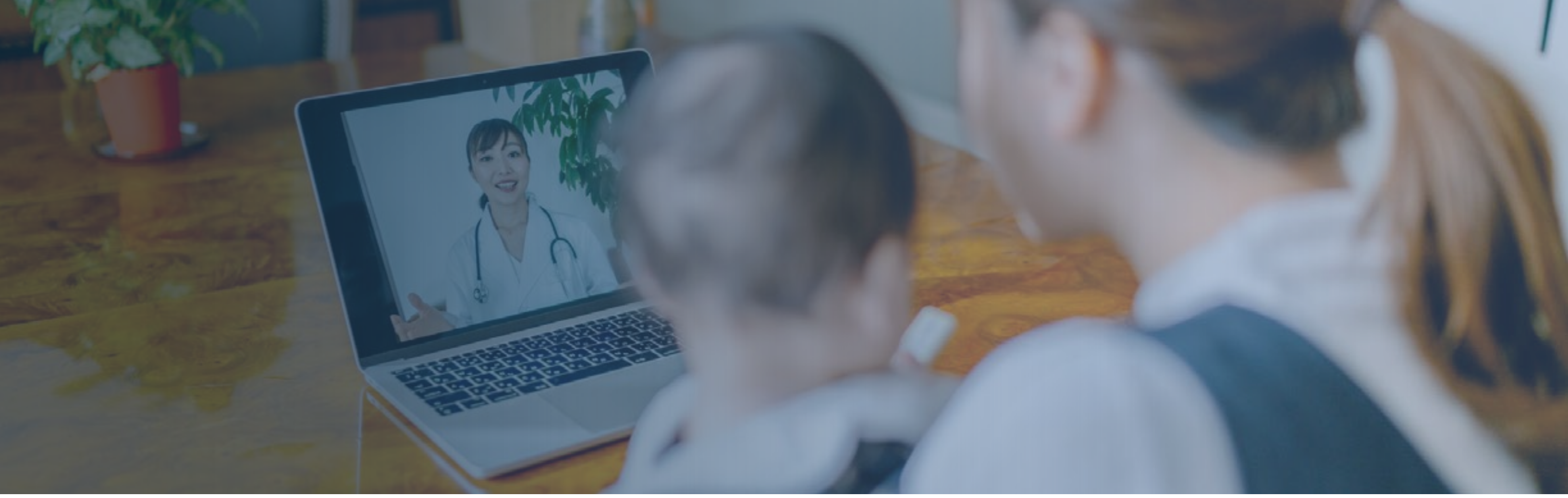
Among the 39% of people who consulted a physician or healthcare professional since the start of the pandemic, two-thirds used telemedicine when doing so (either exclusively or in combination with an in-person visit), many of them for the first time (84%).

HEALTHCARE PROFESSIONALS ARE WIDELY SPLIT ON ITS EFFICACY

Among healthcare professionals, opinions on telemedicine's efficacy vary strongly, from 61% in Spain thinking it is mostly or totally effective to just 13% in Germany and 12% in France.

TELEMEDICINE IS LIKELY TO STICK AROUND

More than half (55%) of consumers reported a satisfactory experience with using telemedicine, while (in a separate survey) healthcare professionals had a somewhat less positive experience, yet at least half of all healthcare professionals surveyed predict telemedicine use to increase.



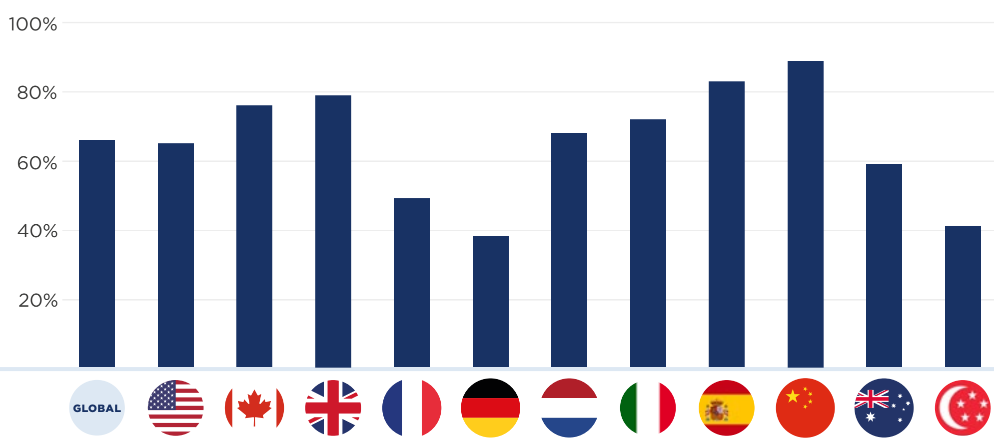
Not surprisingly, with many of us confined to home by lockdowns or other social restrictions, usage of telemedicine – that is, patient/physician consultations done via phone call or video application – is up amongst both those seeking a physician or healthcare consultation and those being consulted. For many consumers, across every geography, generation or income level, it's their first time using it, and they seem to like it.

Healthcare professionals, while also using it, have varying opinions on its effectiveness and how satisfied they are with their experience. But both – consumers and healthcare professionals alike – agree it is here to stay.

Our *New Normal* report findings show that, overall, 39% of people have contacted a healthcare provider during the pandemic and in two-thirds of those cases telemedicine was used, either exclusively or in combination with an in-person visit. Usage of telemedicine ranges from a high of 89% in China and 83% in Spain to lows of 38% in Germany, 41% in Singapore and 49% in France.

Telemedicine usage during Pandemic

% used telemedicine when consulting a physician

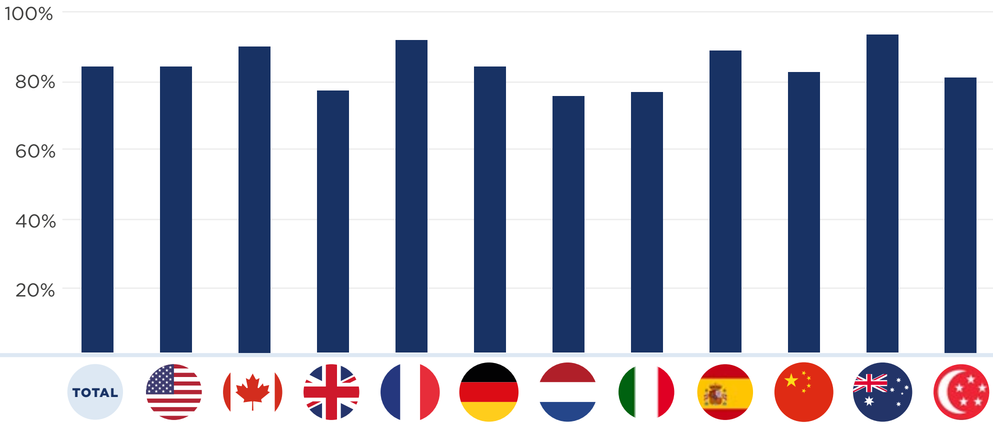


From *Dynata's Global Consumer Trends COVID-19 Edition: The New Normal*

As shown in our *Healthcare Insider* report, **almost all healthcare professionals, irrespective of their country, continue to be in contact with their patients throughout the COVID-19 pandemic, with about a third continuing to see patients face-to-face**, except in France and Germany where face-to-face contact is much higher (43% and 53%, respectively). Alongside these in-person consultations, healthcare professionals also report that telephone consults (audio only) are a popular option – the UK and Canada report the highest rates of 34% and 33%, respectively. In the USA, video conferencing and telephone consultations were equally popular options, ahead of other countries.

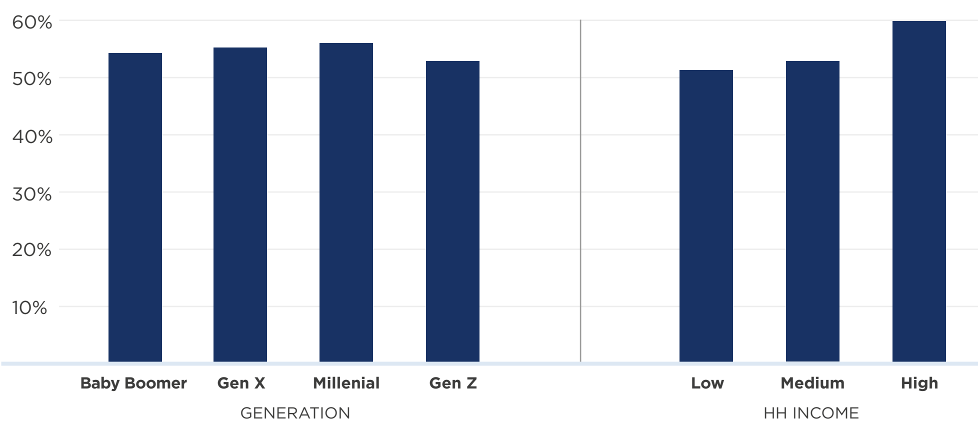
When asked in our *New Normal* report, **many consumers – more than eight in 10 – report that they used telemedicine for the first time during the pandemic**.

Used telemedicine for first time during pandemic



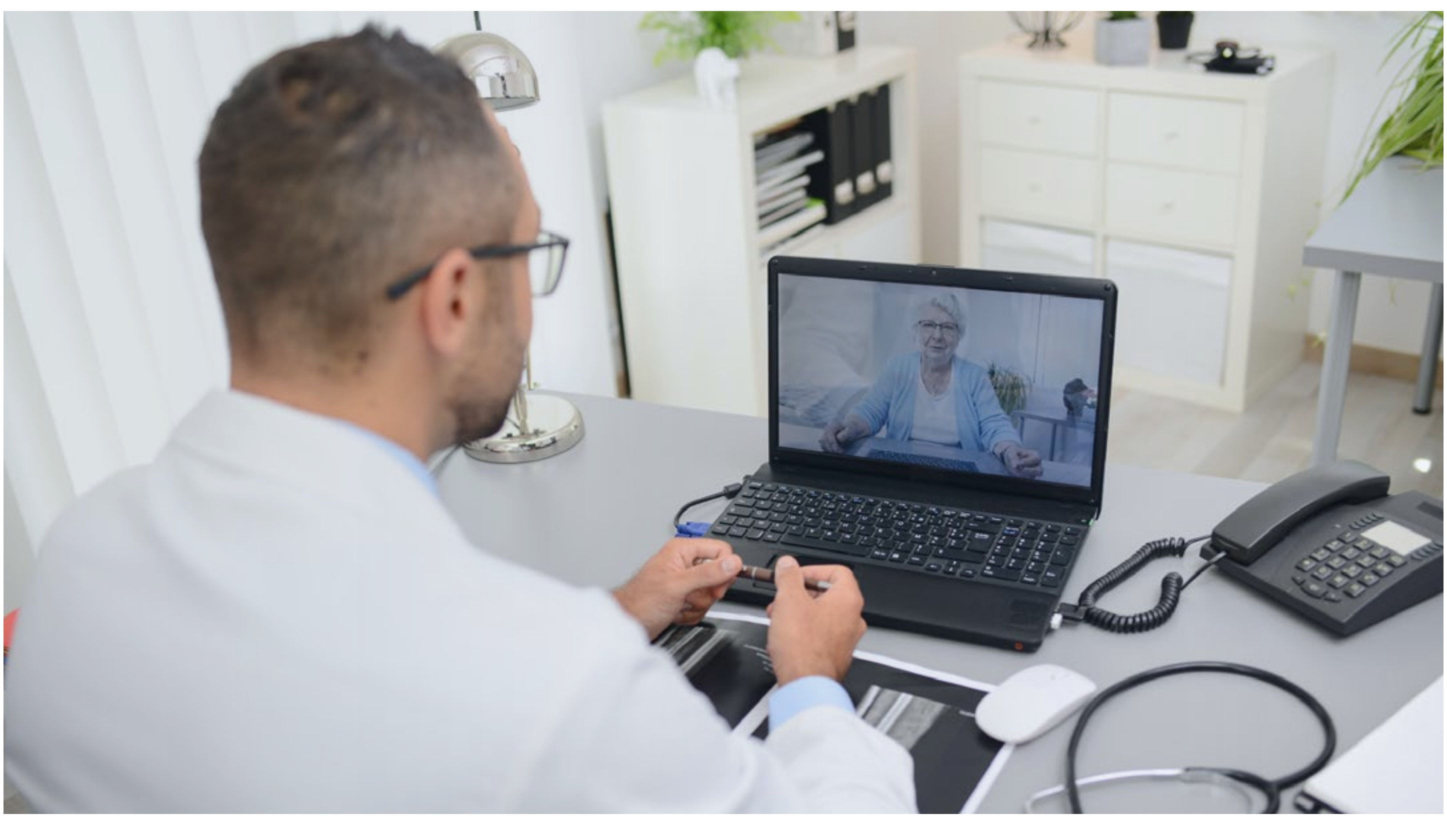
From *Dynata's Global Consumer Trends COVID-19 Edition: The New Normal*

Dynata's *New Normal* report showed that, **among consumers using telemedicine, more than half (55%) found the experience to be satisfactory, with consistent levels across generations and household income levels**.



Consumer satisfaction with telemedicine by demo

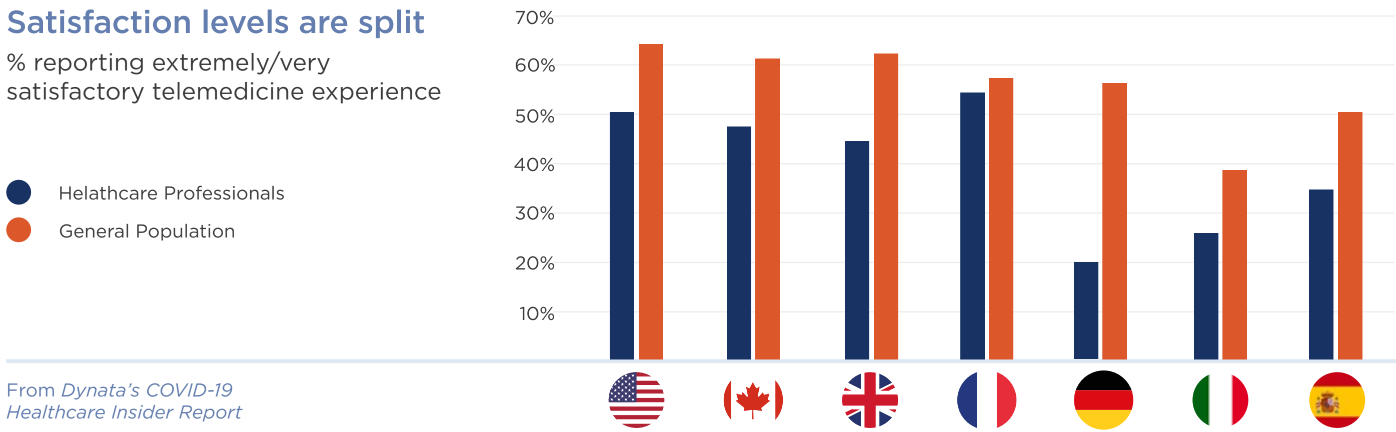
From *Dynata's Global Consumer Trends COVID-19 Edition: The New Normal*



But there seems to be less agreement between consumers and healthcare professionals on the experience of using it. According to our *Healthcare Insider* survey results, healthcare professionals are less enthusiastic in how satisfactory their experience has been, especially when compared to the general population surveyed in their own countries. **The lowest scores for satisfaction were in Germany – just 20% among healthcare professionals versus 57% of the total people surveyed – and in Italy (26% healthcare professionals, 39% total surveyed)**. Yet even among the countries where healthcare professionals reported higher levels of satisfaction, there were still wide splits between their opinions and those of their country's general population – the USA, for example, showed a 14-point gap (51% vs. 65%). The gap was even wider in the UK, where 45% of healthcare professionals reported a satisfactory experience versus 63% of the general population.

Satisfaction levels are split

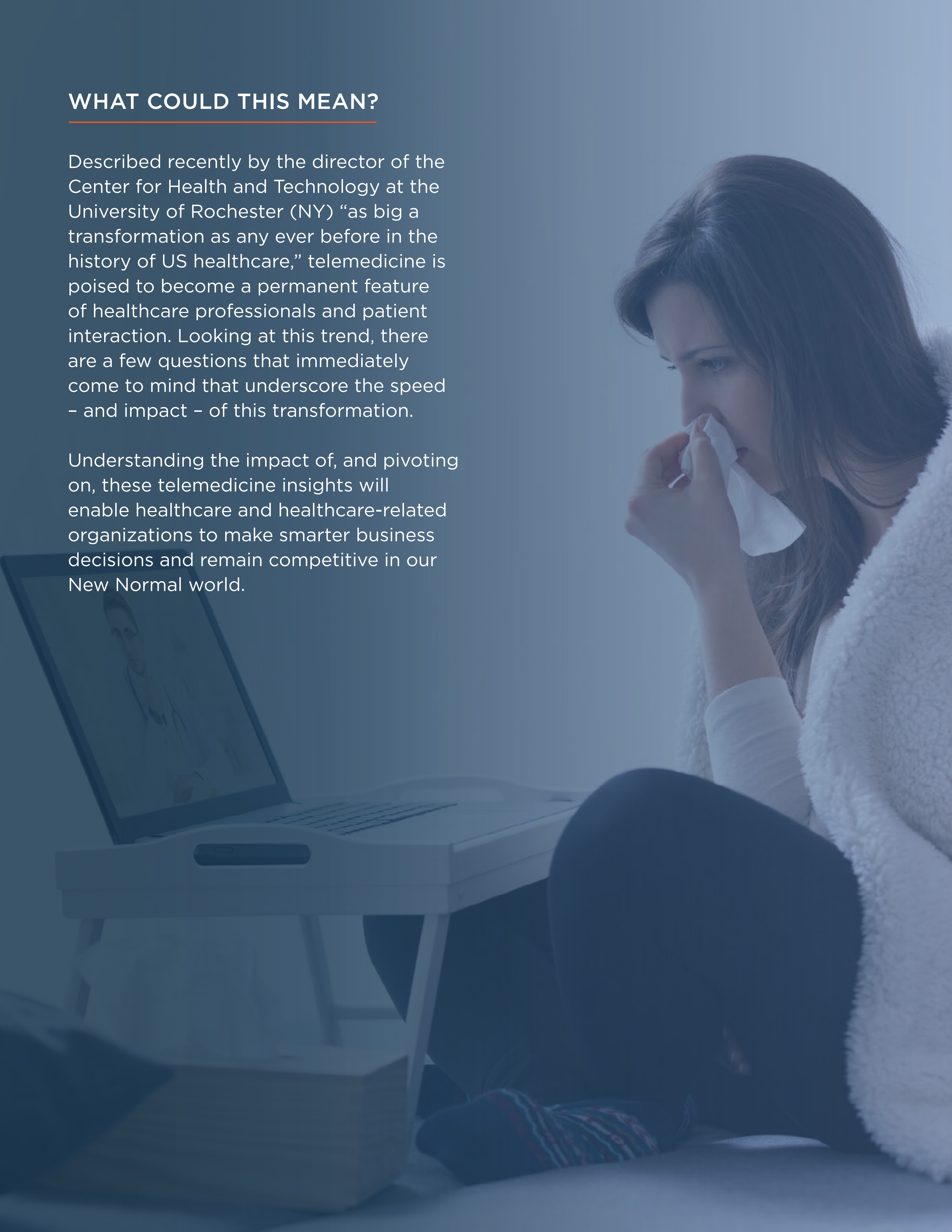
% reporting extremely/very satisfactory telemedicine experience



From *Dynata's COVID-19 Healthcare Insider Report*

Alongside the reported gaps in healthcare professionals satisfaction levels are even **wider disparities in confidence regarding telemedicine's efficacy and effectiveness, from 61% of healthcare professionals in Spain thinking it effective to just 12% in France**. Again, the UK and USA reported higher levels of confidence than other countries at 53% and 52%, respectively.

Regardless of satisfaction or efficacy confidence levels, healthcare professionals overall expect telemedicine's usage to increase, ranging from a low of 48% in France to a high of 83% in Italy and the UK. When coupled with the levels of satisfaction reported by consumers in the *New Normal* findings, it's clear that telemedicine is, indeed, here to stay.



WHAT COULD THIS MEAN?

Described recently by the director of the Center for Health and Technology at the University of Rochester (NY) “as big a transformation as any ever before in the history of US healthcare,” telemedicine is poised to become a permanent feature of healthcare professionals and patient interaction. Looking at this trend, there are a few questions that immediately come to mind that underscore the speed – and impact – of this transformation.

Understanding the impact of, and pivoting on, these telemedicine insights will enable healthcare and healthcare-related organizations to make smarter business decisions and remain competitive in our New Normal world.

POSSIBLE IMPENDING IMPACTS TO CONSIDER AS WE LOOK AT THIS SHIFT:

If more consumers choose the convenience of telemedicine, will hospitals and health systems invest more into technology and technology infrastructure?

Can hospitals and health systems handle the increased bandwidth requirements needed for more online (video, etc) interactions? For example, more rurally-located hospitals or clinics with limited connectivity might not be equipped for widespread telemedicine adoption.

Higher volume of telemedicine consultations could also push greater investment in handheld or mobile devices.

Does the convenience of telemedicine mean fewer office visits and/or a change in follow-up behaviors?

While telemedicine is a convenience during a pandemic – where many of us are confined to our homes or under a limited lockdown – it seems like patients (and healthcare professionals) will use telemedicine in conjunction with in-person visits. Will that change, though, if hospitals and health systems invest more in technology and training?

Similarly, could that additional technology and/or training deliver second-order benefits, such as faster prescription fills or automated deliveries?

What could this mean for insurance companies?

More than 30 USA states require insurers to reimburse healthcare professionals for telemedicine consults. Many employers now offer some form of telemedicine as part of their employee benefits package, both for employee convenience but also as a cost-saving option.

Factor in our data showing an increase in usage, and insurers could see a need to make telemedicine readiness a competitive differentiator to remain attractive to doctors, employers and even individual consumers.

Could providers of healthcare professionals and related healthcare support training see a boost?

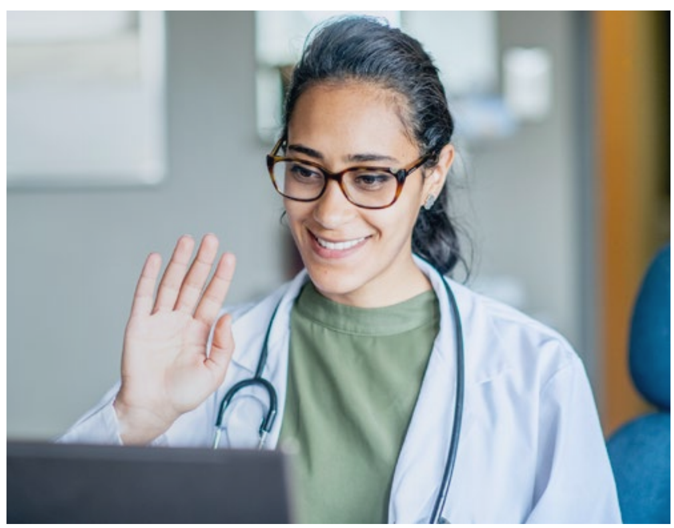
Learning to consult and treat patients over the phone or a video app could bring new training opportunities to organizations like the AMA or even universities and medical schools.

What could this mean for the ubiquity of in-home digital assistants like Alexa or Google Home?

Much the same way that these devices "learn" our preferences for music, temperature controls or shopping, could they start to identify medical keywords as prompts for a consultation?

If so, how could healthcare organizations position themselves to recruit new patients, drive consultation numbers or even build new services that reflect the 24/7/365 usage of these devices in the home?

For continued coverage of the latest global consumer trends, and additional insights on what these trends reveal about our New Normal, visit our COVID-19 Insights Hub and download the full *New Normal* and *Healthcare Insider* reports.



dynata™

www.dynata.com