



2021 TELEHEALTH BENCHMARK SURVEY

Survey Results & Report



Healthcare leaders change their outlook on virtual care roles and goals as access and utilization continue to surge

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Executive summary

The 2021 Telehealth Benchmark Survey revealed clear and important changes in provider attitudes about virtual care and their plans for its future use. Perhaps the most significant change is that most providers now view telehealth as a requirement for serving patients, rather than as a differentiator for attracting them. That development happened very quickly, and is an acknowledgement that virtual care has become a mainstream service that hospitals and health systems are expected to provide. The implications are that future telehealth services must provide an excellent patient experience (and clinician experience), and providers will need to find new ways to innovate in remote care. For patients, virtual care expectations are rising, and may be stronger than their loyalty to the provider.

Not surprisingly, 87% of respondents had telehealth programs in place in 2021, which was by far the highest level ever recorded in the five-year history of the study. 2021 also produced a 26% year-over-year rise in providers offering telehealth, which was a record increase.

Now that providers have their virtual care foundation in place, they are focusing their efforts on expanding services, improving the patient experience and deepening telehealth integration within their overall care delivery and information systems. Even as providers are planning to expand their programs, some concerns about telehealth service delivery are growing. These concerns, which may be traced to quickly implemented, limited-function services rolled out during the pandemic, are not strong enough to stall expansion plans, but do bear watching.

This report provides more details and gives insights into the next steps hospitals and health systems are planning to take with their telehealth programs.

Here are some notable data points and summaries of key findings:

- Currently, 87% of respondent organizations have telehealth programs in place and another 7% have plans to implement by the end of 2021.
- 58% of respondents provided more than 10% of their visits through telehealth. That represents a 36% year-over-year increase.
- Improving patient/consumer engagement is a priority for 41% of organizations that currently offer telehealth, including a top priority for 23%.
- 8% of respondents rated “better competing against other hospitals” a top-level goal for their telehealth programs; 33% rated it among their lowest-priority goals.
- More than a third of organizations that provide telehealth through general videoconferencing platforms plan to replace videoconferencing with a dedicated telehealth system.
- Various data show that telehealth remains a high priority for respondents, even though most already have established, mature and expanding programs in place.



The 2021 survey recorded all-time highs for:

- Providers with telehealth programs in place
- Number of visits conducted through telehealth
- Percentage of patient encounters with telehealth
- Percentage of care that providers believe could be delivered through telehealth

These results are consistent with other data and studies on telehealth growth, utilization, insurance claims, etc. Based on this data and their stated goals, healthcare executives now clearly view telehealth as a care tool, much more strongly than as a resource for increasing patient engagement or market reach. Virtual care has passed the tipping point for adoption, and for now, patient satisfaction. Following the pandemic-driven boom in virtual care access, services offered and visits completed, the maturity of some programs now needs to catch up to utilization by providing a better customer experience.

About the report

Teladoc Health and Becker's Hospital Review asked U.S. hospital and health system leaders about their current telehealth programs and future program plans in a survey that closed September 2021. It produced 155 valid responses. Respondents were primarily health system and hospital executives, as shown in Figure 1. Notably, 45% of respondents have C-suite roles (Figure 2), which represents a higher level of executive representation than in past surveys.

FIGURE 1: Total Respondent Organizations

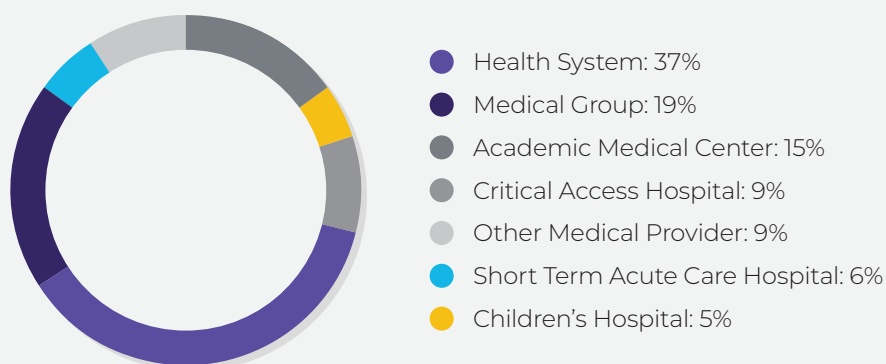
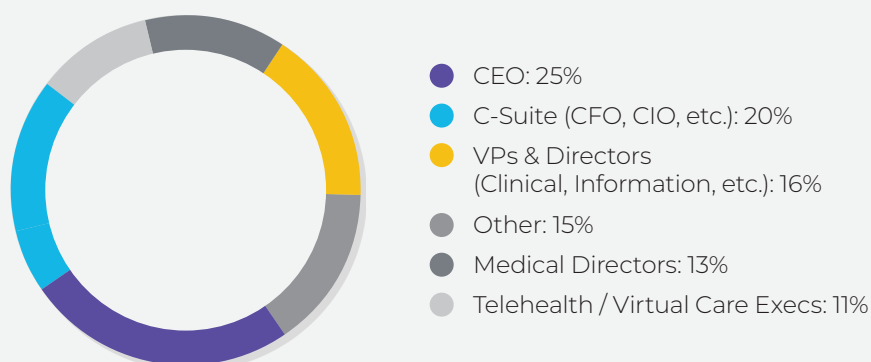
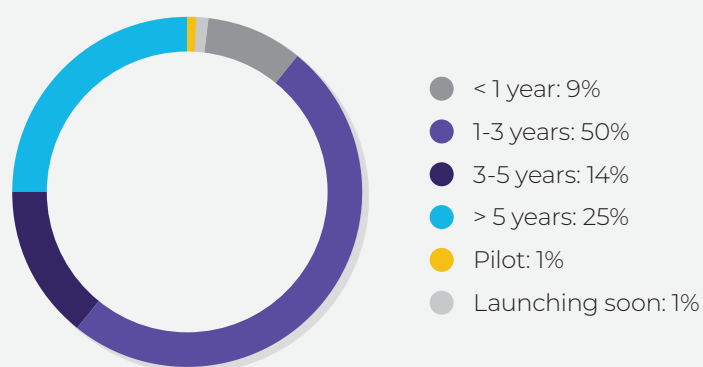


FIGURE 2: Total Respondents by Title/Role



Most respondent organizations are experienced in operating telehealth programs; 39% have been providing services for at least three years, including 25% for more than five years.

FIGURE 3: Organizational Experience with Telehealth



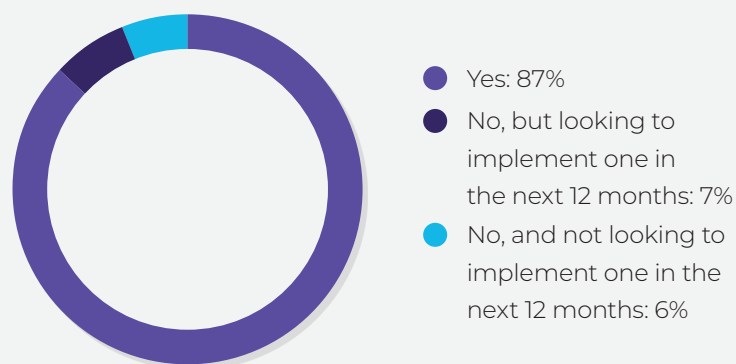
This report presents these findings and provides a snapshot of how providers were using virtual care, their future plans and how the pandemic might influence future direction. All data presented from this point forward is from the 2021 Telehealth Benchmark Survey for respondents with telehealth programs in place, unless otherwise noted.

Current State of Telehealth Programs, Plans & Priorities

Hospitals and health systems successfully addressed the need to have telehealth infrastructure and services to meet the pandemic-driven demand surge for remote care. In 2021, 87% of respondents had telehealth programs in place—up from 61% the year before. To put that in perspective, 30% of all telehealth programs that were active in 2021 had been implemented within the previous 12 months. Five years ago, only 39% of responding providers had programs in place, and the level did not top 50% until 2019. The recent pace of expansion is unprecedented, and many organizations are now reassessing their virtual care infrastructure and service offerings.

There has already been a lot of data published that documents the increase in telehealth visits conducted during the pandemic. The 2021 Telehealth Benchmark Survey looked at this growth another way, by asking respondents what percentage of their patient visits were conducted by telehealth over the preceding 12 months (see Figure 5). It found that 58% of respondents completed at least 10% of their total visits by telehealth; a statistic that is more than twice as high as the previous year, when 22% attained that level. The 2021 total includes approximately 14% of respondents that completed more than 25% of their patient visits via telehealth.

FIGURE 4: Current State of Telehealth Adoption



The higher percentage of patient care delivered through virtual care can be taken as another milestone in telehealth's maturity. Whether providers will be able to sustain or increase their percentage of patients served through telehealth (if desired) will depend on the services offered and quality of experience provided, and the user experience for clinicians should not be underestimated, as other data will highlight.

One reason for the higher percentage of patients served through telehealth is that providers continue to make more services available—62% of organizations are expanding their telehealth programs, and only 32% describe their programs as being in maintenance mode (Figure 6).

There was an interesting development in how providers prioritize the patients they want to serve through virtual care. The category of “Lives in which we hold risk” surged in importance and surpassed “New patients” as a top priority. Patients in the risk pool are now considered the second-highest patient population after existing patients (there is overlap between the groups).

FIGURE 5: Percentage of Patient Visits Conducted Through Telehealth

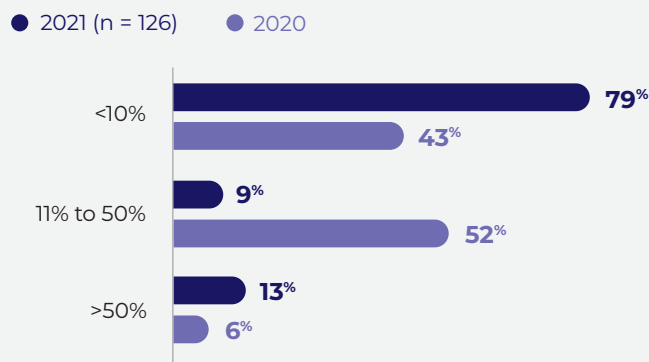


FIGURE 6: Current Status of Providers' Telehealth Programs

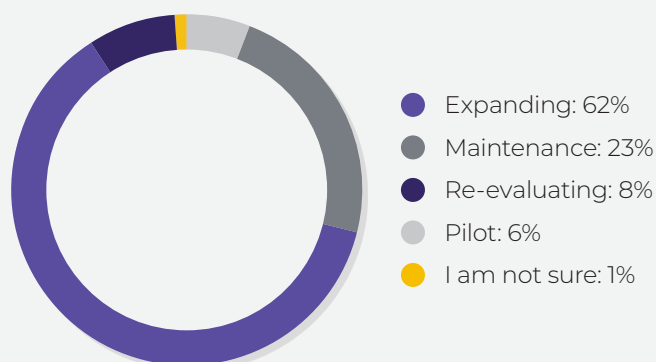
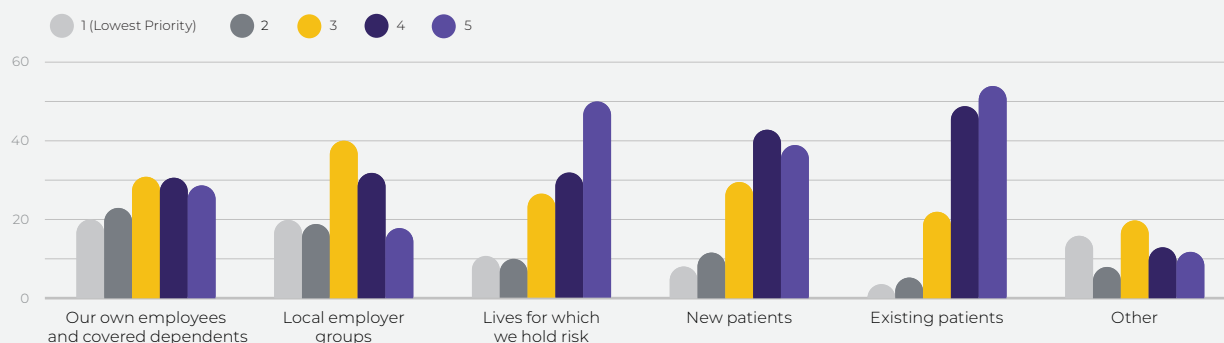


FIGURE 7: Patient Population Priorities for Telehealth Services



As operations continue to normalize after the pandemic and organizations gain experience with telehealth, it still commands leadership attention. Among organizations with programs in place, nearly two-thirds of respondents still consider telehealth a relatively high strategic priority.

Priority status is one of several aspects of virtual care that have remained relatively unchanged, despite the rapid increases in implementation and utilization. For example, the leading success metrics that organizations use, and the implementation barriers they face, are largely consistent with prior years. The following graphics and analysis provide additional detail.

The number of respondents that ranked patient satisfaction their top priority for measuring virtual care success nearly equaled the total for all other response options combined. “Utilization” was a distant second as the most important goal. Note that efficiency gains ranked much higher than revenue, ROI, savings or profitability metrics, which is a sign that executives are strongly emphasizing patient care over revenue share in their telehealth programs. Physician satisfaction also ranked higher than success metrics related to financials. The rankings based on a weighted scoring system are shown in Figure 9.

FIGURE 8: Telehealth as an Organizational Strategic Priority

Among your organization's strategic priorities, where does telehealth fall?
Please rank from 1 to 5, with 1 being the lowest and 5 being the highest

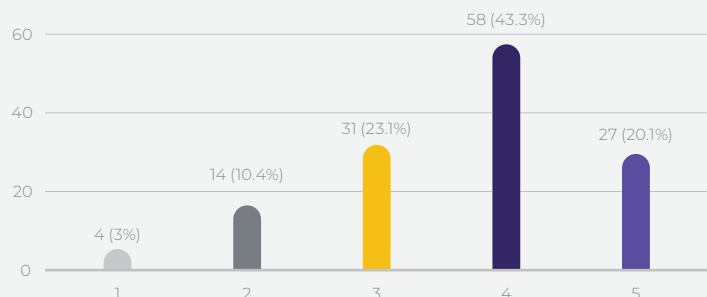


FIGURE 9: Success Metrics for Telehealth Programs – Ranked by Importance

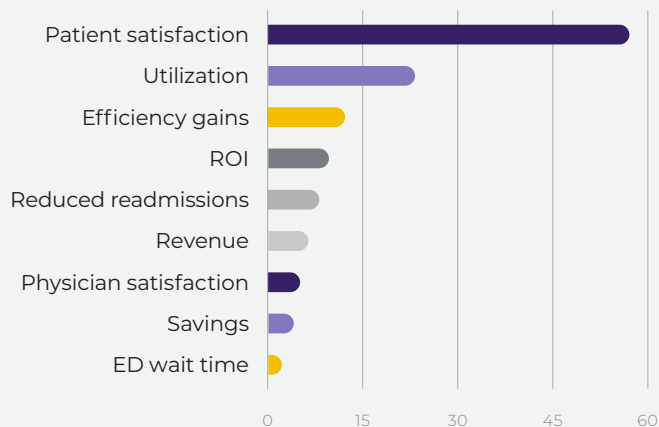


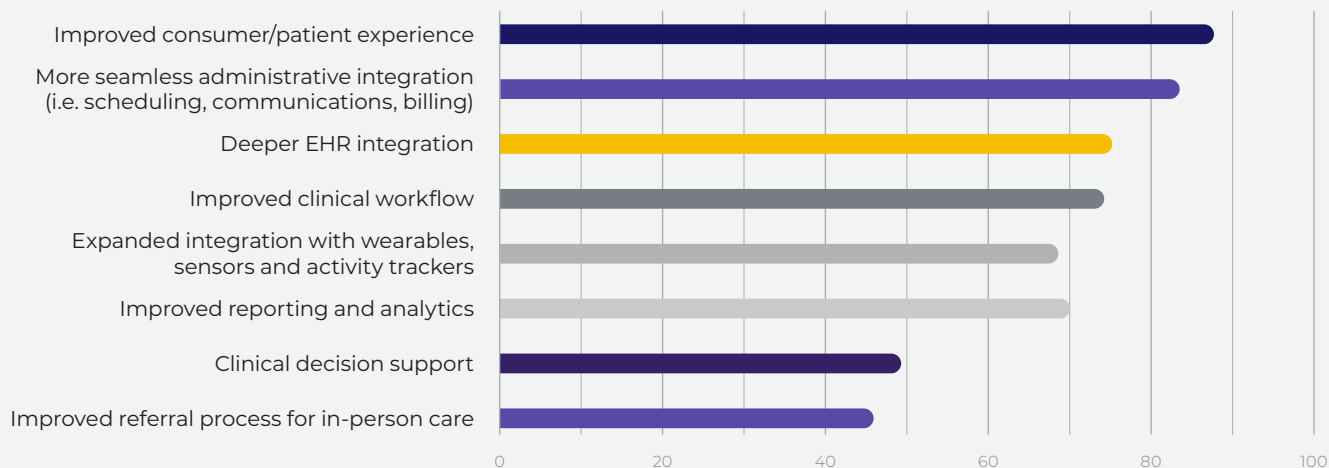
FIGURE 10: Top Lessons Learned from Providing Telehealth



Securing operational support was the top lesson learned last year, which is likely the result of trying to manage hastily planned and fast-growing programs during the pandemic—operational support only ranked fifth in the previous study. Securing clinician buy-in ranked as the second-leading lesson learned from the telehealth experience.

The pandemic experience appeared to motivate another shift in telehealth attitudes, regarding the most-desired features to add to systems already in place. There generally hasn't been consensus on this point, but last year wearables and other peripherals ranked highest on the list. This year, better patient experience is most desired, and various aspects related to improved integration (for example, with the EHR, with clinical workflows and with administrative processes) also ranked highly. These priorities for future improvement could be a reflection of the video-oriented, limited-function telehealth visits that were offered during the pandemic.

FIGURE 11: Most-Desired Future Features in Telehealth Solutions

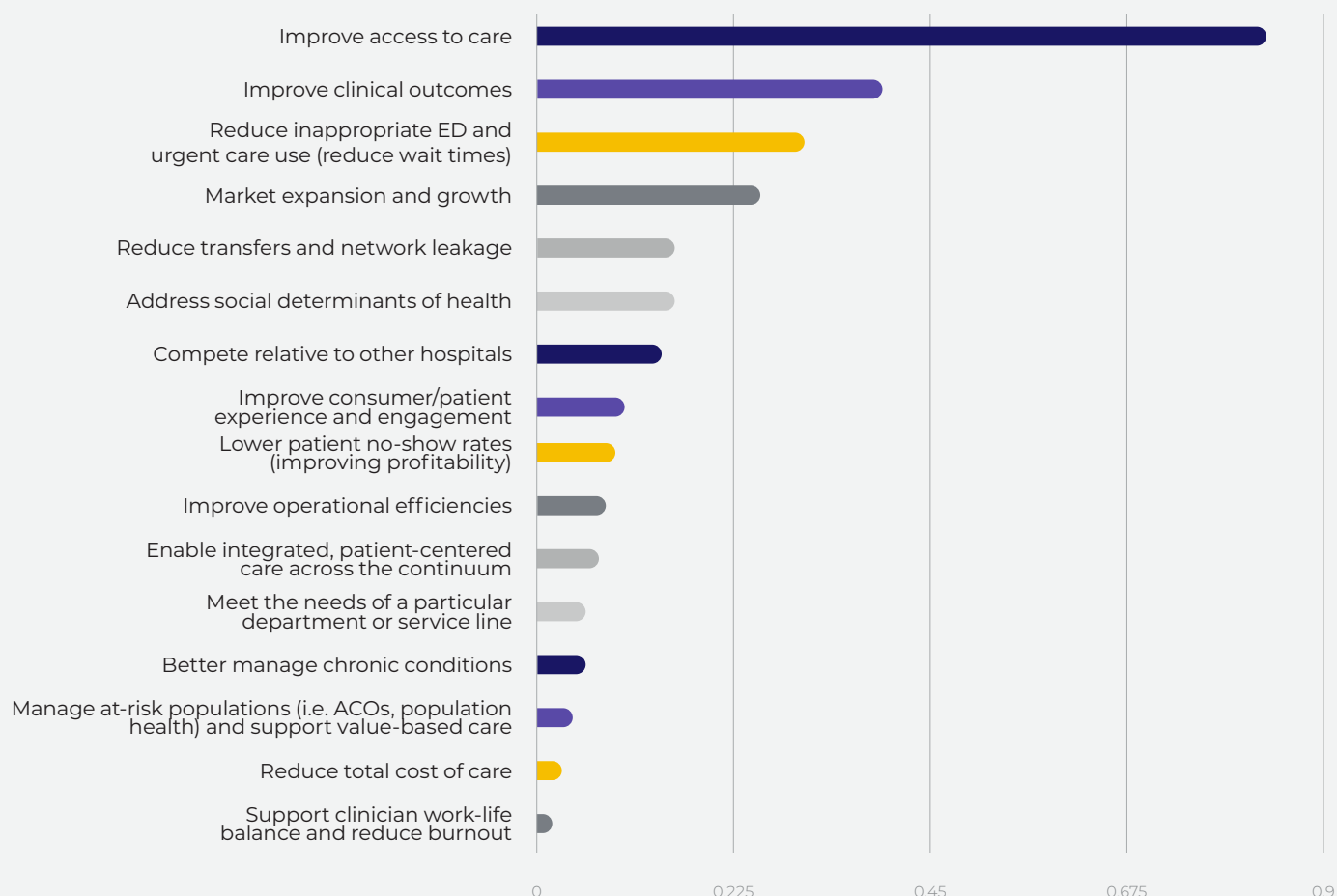


Now that virtual care has undergone a quick transition from a differentiator to a requirement, executives are asking how they can continue to innovate and grow their telehealth programs to advance their organizational goals. The pandemic simultaneously accelerated this effort, by driving implementations and utilization, and hindered it, by requiring providers to focus on short-term needs and/or to implement non-optimized systems. The following sections explore provider goals for telehealth and possible future directions for their programs.

Providers Narrow Focus for Their Telehealth Goals

While improving access to care remained the leading goal in 2021, there was a 9% increase in respondents that rated it their most important goal. Improving clinical outcomes ranked second, and no other goal was cited by more than 35% of respondents. Outside of improving access, there remains little consensus on the role and direction telehealth programs should take.

FIGURE 12: Organizational Goals for Telehealth – Ranked by Importance*



*Goals are considered "important" if they are rated 4 or 5 on a 5-point scale.

FIGURE 14: PERCENTAGE OF PATIENT CARE RESPONDENTS BELIEVE COULD BE DELIVERED VIRTUALLY

Percentage of care	2021 respondents	Change in respondents since 2020
<5%	14%	+9%
5% – 10%	22%	-9%
11% – 20%	23%	-3%
20% – 50%	33%	+14%
>50%	8%	-4%

This year, only 8% of respondents rated better competing against other hospitals a top-level goal for their telehealth programs (another 5% rated it as important), and 33% rated it as having the least importance; last year 20% said improving competitiveness was a top-level goal. The response patterns were similar for questions about using telehealth for market expansion.

As noted for Figure 5, 14% of respondents said their organizations conducted more than 25% of their patient visits by telehealth in the preceding 12 months, and the majority (58%) completed at least 10% remotely. While necessity drove much of that utilization, there are signs it may be sustained and expanded. Fresh off their recent experience, more executives now believe a higher percentage of care can be delivered virtually than believed so a year ago (Figure 14). For example, last year 32% of respondents believed at least 20% of care could be delivered virtually, now that number has more than doubled to 41%.



While executives believe they could successfully complete more patient encounters through virtual care, some express growing concern as to whether the current infrastructure will be up to the challenge. For years, competing organizational priorities and reimbursement concerns have been cited as the top barriers to telehealth implementation and expansion, and the suitability of the underlying technology was not a widespread concern. That is still the case, as shown in Figure 15. However, 13% of respondents said “lack of a high-performing telehealth platform” was a very difficult barrier to their implementation or growth in 2021. While that was far from a leading barrier, technology had never been cited as a challenge by more than 4% of respondents in any previous survey. This raises the question: Did virtual care software suddenly get worse, or was the fast deployment of inadequate solutions with limited training and patient marketing the problem?

FIGURE 15: Leading Barriers to Telehealth Implementation or Growth

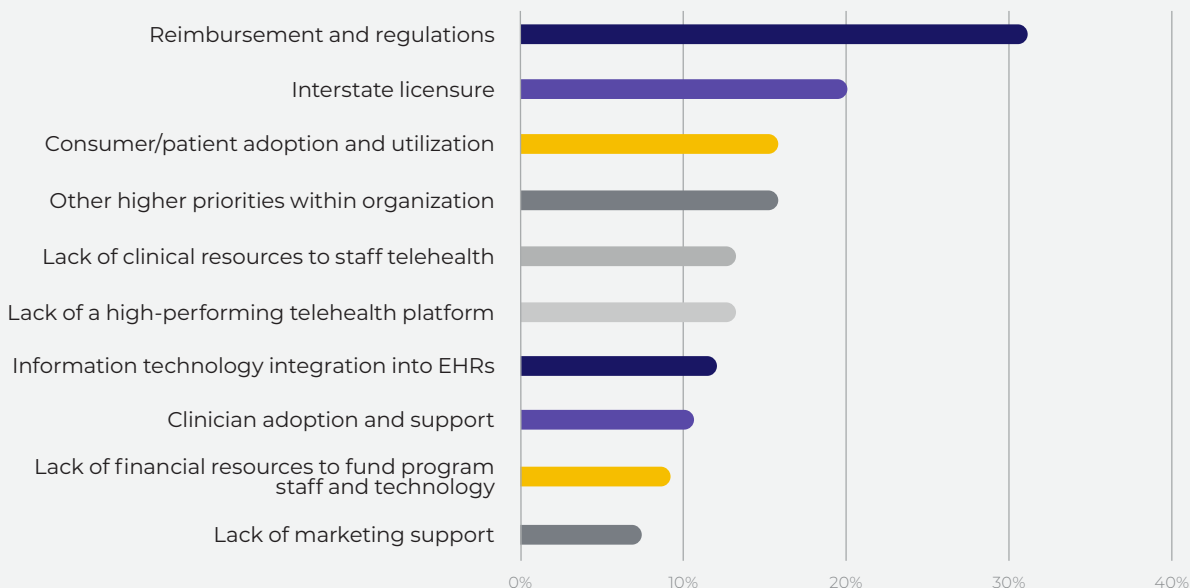
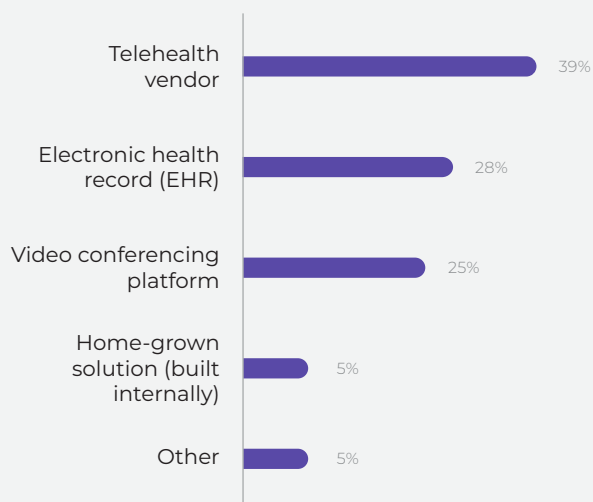


FIGURE 16: Plans for Videoconferencing Use



Will Videoconferencing Undermine Progress?

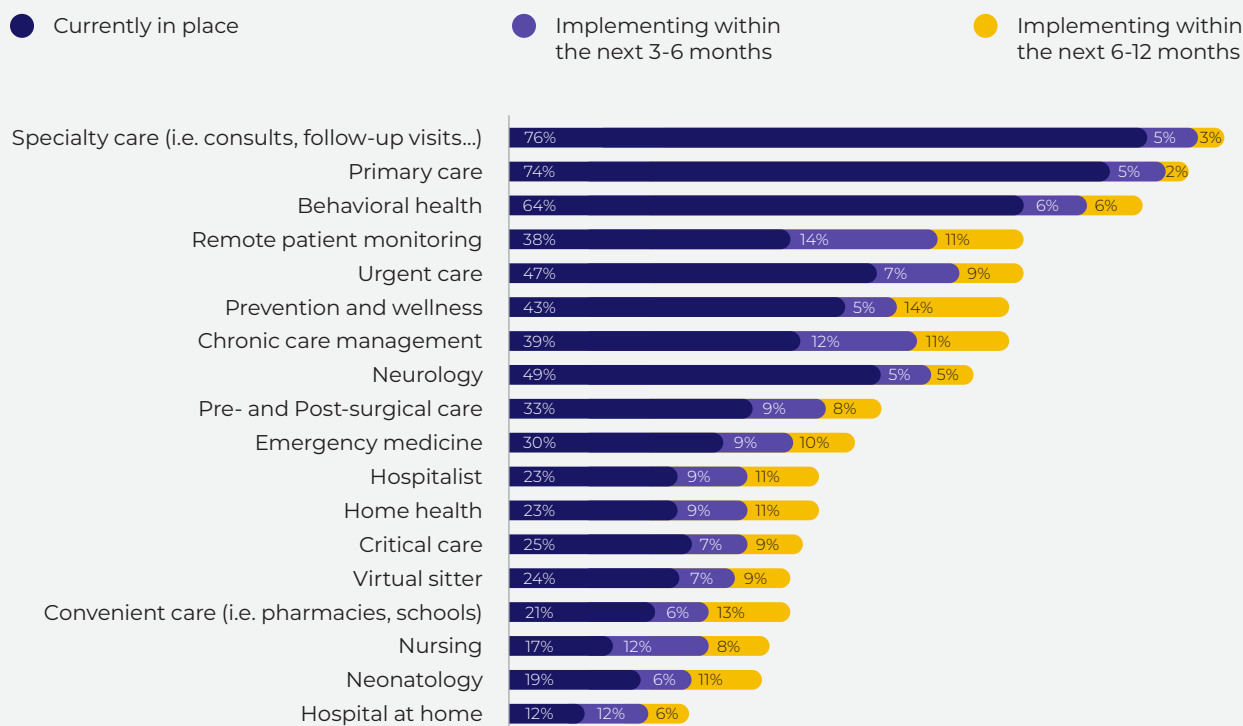
The rise in virtual care platform and integration concerns corresponds to the rise in videoconferencing software that is not purpose-built for enterprise telehealth needs. In the last year, 25% of providers used general-purpose videoconferencing platforms to conduct telehealth visits (some also used dedicated telehealth solutions). More than a third of these users plan to replace videoconferencing with a telehealth system. That indicates providers recognize clear limitations in consumer-oriented communication systems when they are applied for engaging with patients.

Despite consumer familiarity with popular videoconferencing tools, 67% of hospitals that are using videoconferencing for patient encounters say the feature they'd like most in their future telehealth system is "Improved consumer/patient experience." That tied with "Improved administrative integration" as the most-desired future functionality among hospitals using videoconferencing for telehealth. A majority of respondents reported conducting more than 10% of their telehealth visits outside the EHR system. That high level likely resulted from the spike in videoconferencing visits during the pandemic.

Because standalone videoconferencing solutions do not integrate well with electronic health records, scheduling software or other clinical and administrative systems, providers often must keep several applications running and screens open when engaging with patients. This is an inconvenient distraction at best, and more importantly, can undermine patient and provider satisfaction. The high importance that respondents attached to improved functionality, such as better integration with EHR systems and clinical workflows, suggests providers have recognized this limitation. "Enterprise-level telehealth software that can span all care locations and acuity levels across a broad organization" was a highly rated item that organizations plan to implement in the next year (Figure 18).

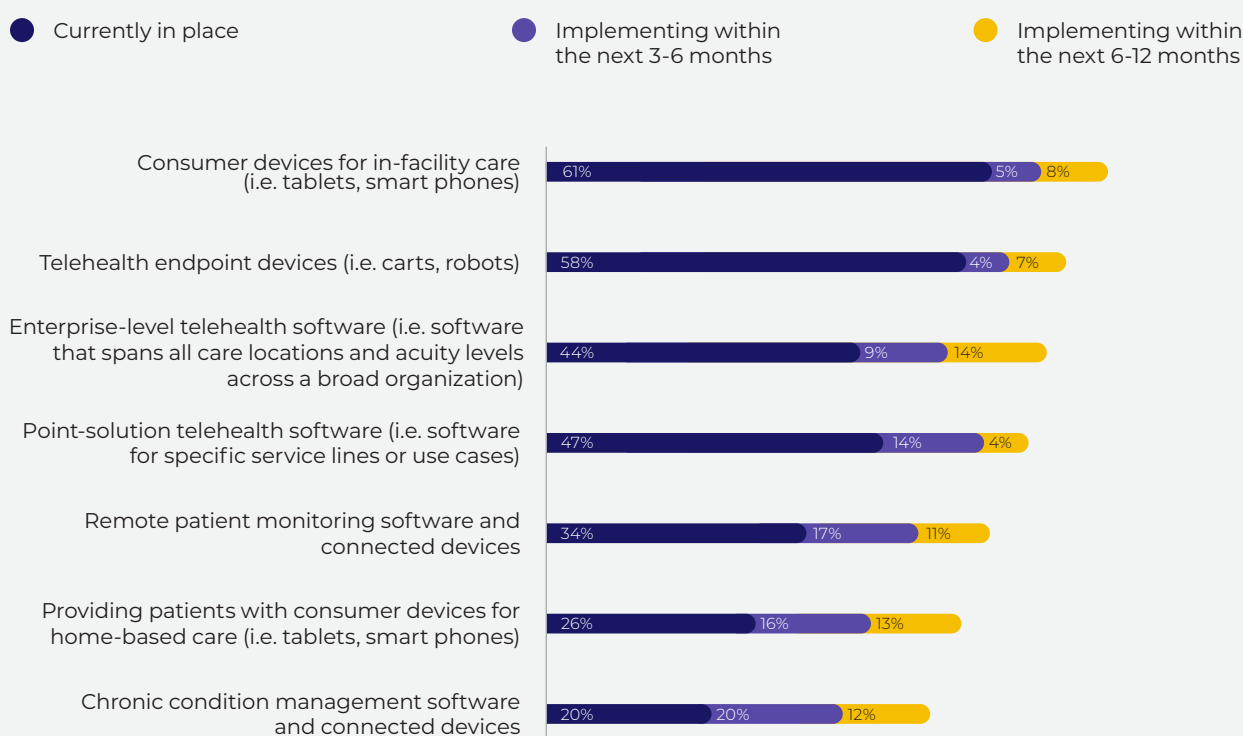
The future virtual care goals that providers expressed and how they plan to expand their programs suggest system upgrades, plus more education and patient outreach, will be needed.

FIGURE 17: Programs in Place Now & Programs Planned for Implementation



Virtual care is most commonly used today for primary consults, primary care, follow-up visits, second opinions and behavioral health. As Figure 18 shows, some of the highest-priority programs and components that providers plan to add in the future include chronic condition management software, remote monitoring devices, and additional equipment and software for both patients and providers, which all would benefit from direct integration in to the telehealth and EHR systems.

FIGURE 18: Telehealth Technologies in Place Now & Planned for Implementation

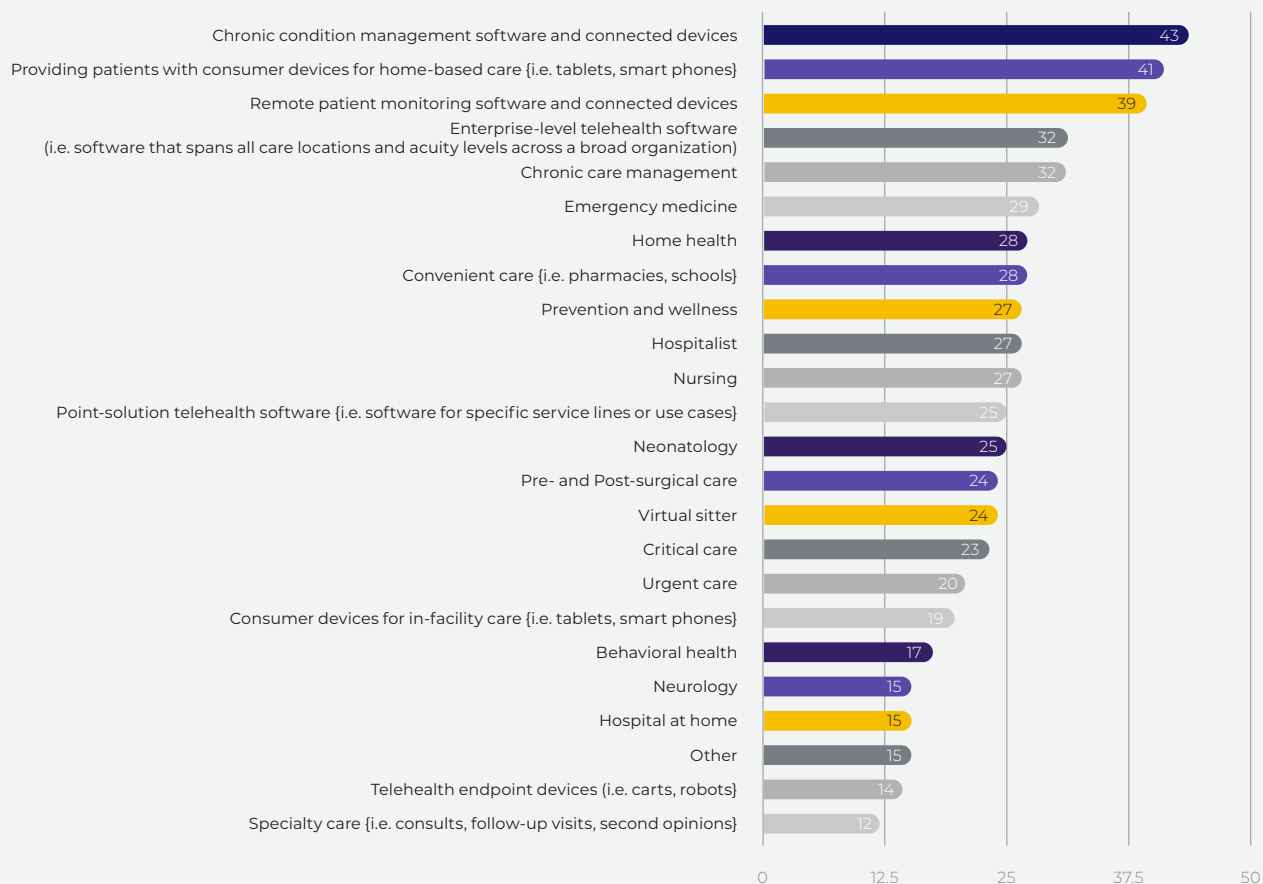


What's Next After the Pandemic Bump?

Now that patients have been widely exposed to telehealth and are more likely to use it going forward, providing a positive patient experience is even more important, because virtual care may serve as the front door or face of the provider system. Improving patient engagement is a priority for 41% of organizations that currently offer telehealth, including a top priority for 23%. With providers expanding their practice offerings, a key to attaining high patient experience and satisfaction ratings will be to attract patients to telehealth-favorable services. That could be a problem, as various data suggest many organizations do not prioritize telehealth marketing or believe in a correlation between marketing and utilization. For example, only 18% of respondents say "Lack of marketing support" is a barrier to virtual care success, yet at least twice as many report that patient adoption (39%) and clinician adoption (36%) are barriers. Marketing can help mitigate those challenges. This disconnect underscores the importance of comprehensive telehealth planning that includes patient outreach and education. It also points to the value of working with partners that can provide the needed support and expertise in marketing, patient engagement, training and technical support.

After quickly introducing or expanding virtual care services to weather the pandemic storm, hospitals and health systems are now reassessing their programs at the clinical and technical levels and are setting future priorities. The top enhancements that providers plan to implement in the next year (Figure 19) include a mix of new technical expansions and upgrades (e.g. chronic condition management software, devices for remote monitoring and connection, et al.) and new clinical offerings, such as chronic condition management services. Taken together, these plans point to more support for at-home care and suggest hospitals will be testing hybrid models that include a planned mix of virtual and in-person care episodes.

FIGURE 19: Programs Planned for Implementation Within 12 Months



Conclusion

The 2021 Telehealth Benchmark survey found that telehealth is changing beyond the large increases in utilization. Providers are pursuing deeper integration with processes and information systems and want to continue to improve the patient experience. Providers are advancing hybrid care models and telehealth will be one of the enablers. New practice and service offerings will be attended by new remote monitoring devices and other equipment, which will add to integration and ease-of-use challenges. How well these challenges are met may dictate the future pace of telehealth expansion.



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