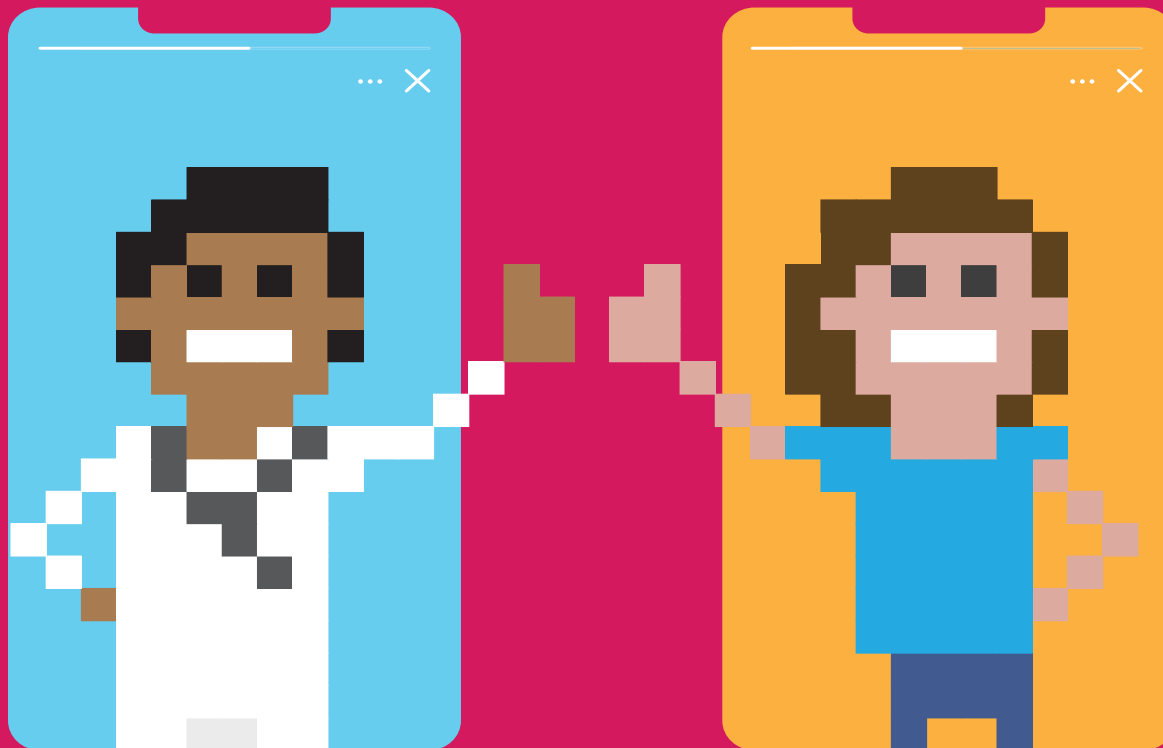
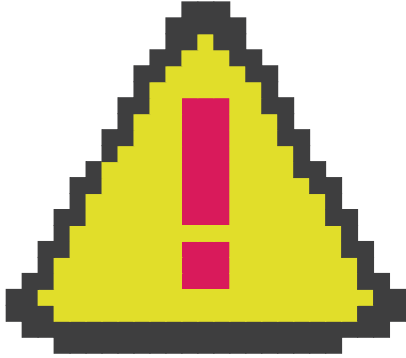




# VIRTUAL IS THE NEW REALITY

Healthcare's Newest Currency: The Control and Convenience of Telehealth





# Wait, what's a Pulse Report?

Now in its 12th edition, Laughlin Constable's PULSE report is a quantified view of healthcare consumers' criteria, perceptions, and behaviors throughout their healthcare journey. It is based on data collected in May 2022 via an online survey of 1,200 healthcare decision makers across the nation. The PULSE Report focuses on timely topics, and in the past uncovered insights related to costs and price transparency, generational influences, and the quest for personalized care.

# VIRTUAL IS THE NEW REALITY

## | *The 2022 PULSE Report*

The 2022 PULSE report unravels how consumers are redefining their relationship with healthcare as we emerge from the COVID-19 pandemic. Whether they've put it all behind them or are still struggling to find their new normal, consumers have reshuffled their healthcare priorities and are taking a more active role in their healthcare decisions.

One key advancement that's giving consumers more flexibility at almost every point in their patient journey is Telehealth. In this report, we explore how Telehealth has penetrated its way across consumer healthcare decisions, the reasons why it has been so effective, and the ways healthcare systems and marketers can take advantage of this virtual tool to grow consideration.

Our goal is to help healthcare systems and their marketers confidently create messaging, content and programs that resonate with today's consumers.



# TRANSFORMING HEALTHCARE: THE IMPLICATIONS OF TELEHEALTH

Consumers have come to rely on the seamlessness that digital technologies offer in every aspect of life – from virtual meetings and fitness classes to buying groceries. And they're now critiquing their interactions with brands, including healthcare systems, on their ability to provide convenience and control of their lives.

Technological advancements in Telehealth are allowing healthcare providers to meet consumers' expectations by providing them more choices as we move away from a one-size-fits-all approach. We'll focus in-depth on seven topic areas to highlight how Telehealth is transforming the healthcare experience.

## 1. Telehealth is at a tipping point

Telehealth has empowered consumers to have more say in their healthcare decisions by opening up new ways to access the care they need. With convenience and control driving their decisions, healthcare providers must integrate and optimize virtual solutions into the patient journey.

## 2. Even out-of-state is within reach

Telehealth has broken down the barriers and the borders of traditional healthcare, giving consumers greater access to the care they need, when and where they need it. With Telehealth as a bridge between consumers and healthcare providers, communicating expertise and treatment options will help patients as they balance online and offline care.

### 3. A safe bet

Safety concerns remain an influential factor in consumers' decisions whether to receive in-person care. While this concern will likely linger for a while, Telehealth offers an efficient solution by eliminating in-person interactions where germs or diseases could spread. This is especially important for immunocompromised consumers.

### 4. Making up for lost time

A large portion of Americans are sandwiched between their aging parents and their children. Many in this “sandwich generation” are making healthcare decisions for both groups, creating even busier days and complicated schedules. For them, Telehealth is a time-saver – from scheduling appointments quickly, to reducing wait times to be seen by a doctor, to simply avoiding an unnecessary trip.

### 5. Another door for mental health care

Given the rise in mental health needs and lack of mental health resources for many, Telehealth is a key tool that can give consumers who are struggling with mental health that convenience and control necessary for them to feel comfortable taking the first step in receiving care.

### 6. Beating the competition

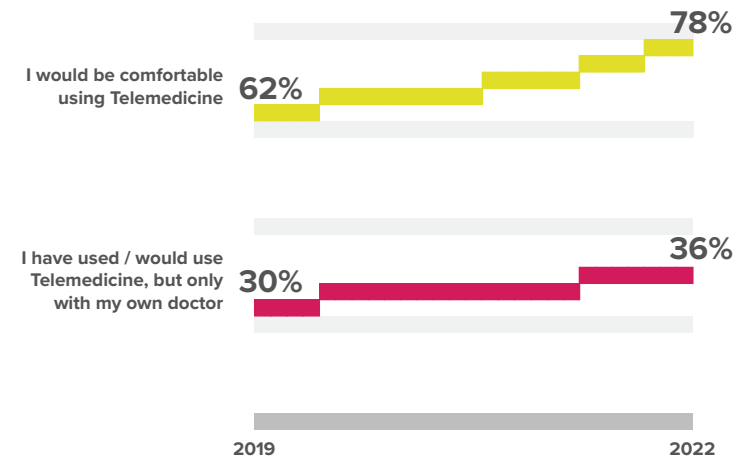
Retail giants and clinics are providing consumers with new, convenient options in healthcare, posing a threat to traditional healthcare providers. Telehealth services allow providers to continue to provide the expert care their patients know and trust directly to patients' own homes, which is a benefit that must be made known.

### 7. A peek into the future

Consumers' acceptance of Telehealth signals an openness towards finding other innovative solutions throughout their patient journey. This opens the door for the next frontier, such as the integration of wearable technology as a means of preventive and on-going treatment.

# Telehealth is at a tipping point

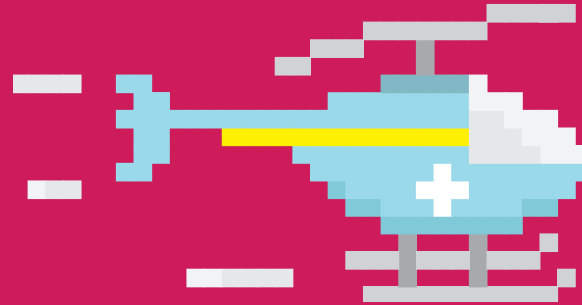
More and more consumers are opening up to Telehealth and its ability to add convenience to a task that is sometimes burdensome. In 2019 (pre-pandemic), about 6 in 10 of all respondents said that they would be comfortable using Telehealth. As of May 2022, this number jumped to nearly 8 in 10.



PULSE 2022: n = 1,237

Q: Telehealth (also sometimes referred to as Telemedicine) offers the ability to consult with a doctor online via a two-way video, and is another option for making health care more convenient. Which of the following statements do you agree with?

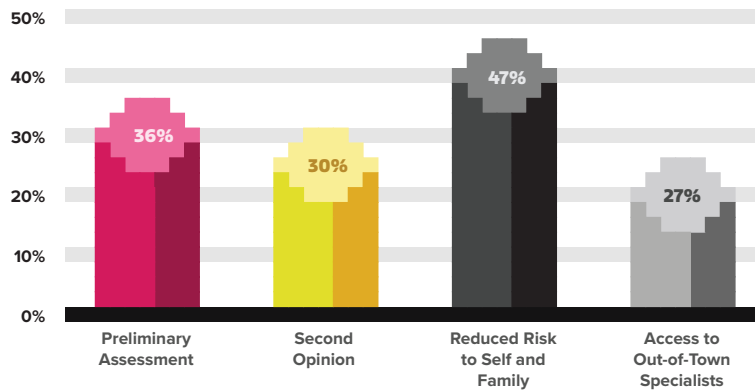
But the real proof is in the actual numbers. Virtual-first medical provider Teladoc® reported in its 2022 annual report that 2021 visits had increased 38% compared to 2020, when we were at the height of the pandemic! This illustrates how the pandemic changed healthcare visits and behavior not just temporarily, but for the foreseeable future. Ensuring that Telehealth is an option amongst a healthcare systems' services will be crucial as consumers continue to become more comfortable with virtual care.



## Even out-of-state is within reach

Consumers see several key benefits to Telehealth, including receiving preliminary assessments, second opinions and access to specialists outside of their town. All of these use cases come with the added benefit of a reduced risk of contracting a disease at the hospital, which nearly half of respondents cited as a reason to use Telehealth.

By meeting consumers with care right where they need it, healthcare systems can utilize Telehealth to give their patients confidence in their decision making. Also, healthcare providers can better reposition their specialized treatment and care to be more accessible, alleviating some of their current barriers, like distance and time.



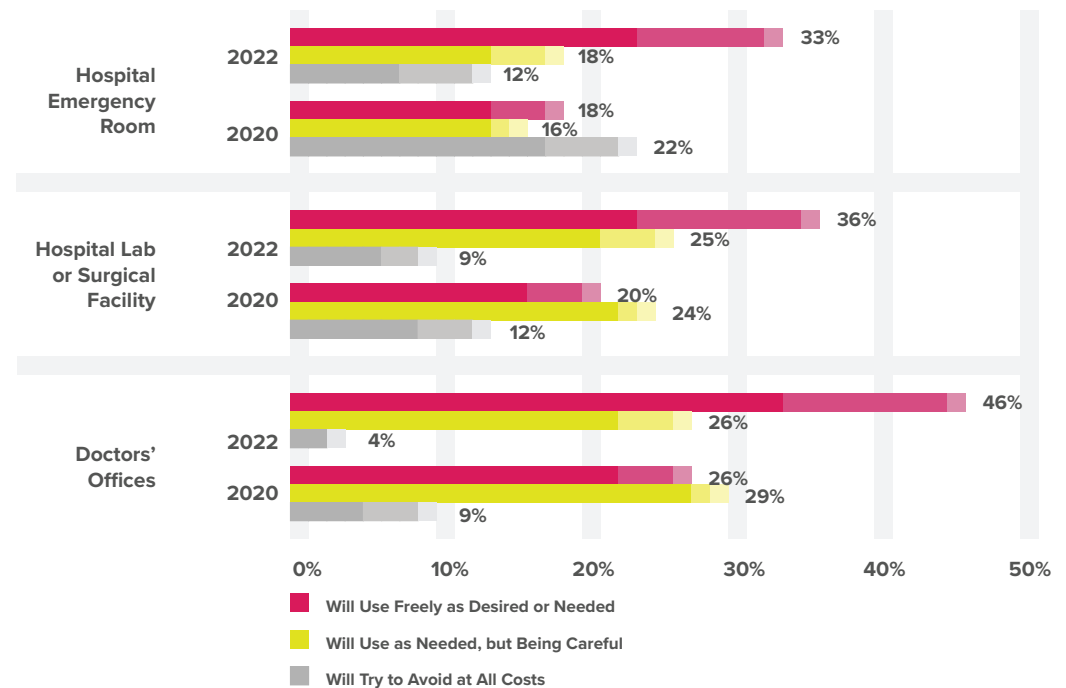
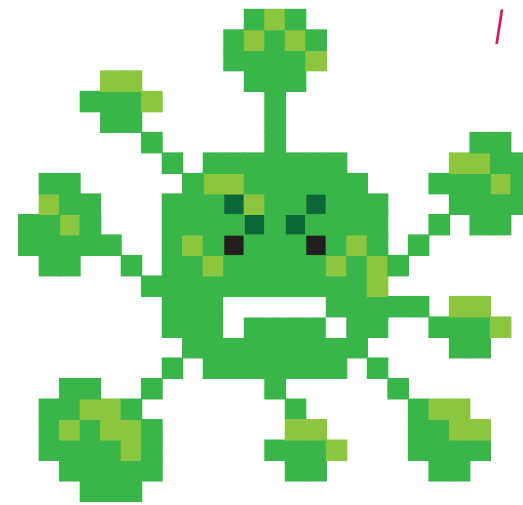
PULSE 2022: n = 1,200  
 Q: For each of the situations below, please select the option that best reflects your likelihood of using Telehealth in that situation. [very likely]  
 Q: What, if any, are the benefits of Telehealth in your opinion? [any agree]

# A safe bet

There's no doubt 2022 represents a bounce-back year for physical healthcare facilities. As compared to 2020, a significantly larger proportion of healthcare consumers are comfortable with the idea of freely going to a doctor's office (+20 percentage points), hospital lab or surgical facility (+16 percentage points), or the E.R. (+15 percentage points).

However, there is still a lack of confidence and lingering hesitancy among consumers regarding their current relationship with physical healthcare facilities. More than half of consumers in 2022 cite that they would still feel a degree of reluctance in visiting a doctor's office, nearly two-thirds would feel a sense of hesitation going to a hospital lab or surgical facility, and a full two-thirds would think twice before entering the E.R.

These numbers offer further evidence that a virtual form of healthcare may be the answer when possible. Healthcare systems will need to strike a balance of offering both physical and virtual care where available, with a prominent opportunity having emerged within doctor visits. However, with Telehealth still in its infancy stage, essential care such as hospital labs and E.R.s will remain in the domain of physical facilities, which means communication as to why that's beneficial will be important in helping consumers feel as safe as possible.



PULSE 2020: n = 1,887  
 PULSE 2022: n = 1,237  
 Q: What best describes your current attitude towards visiting the following facilities for health care?

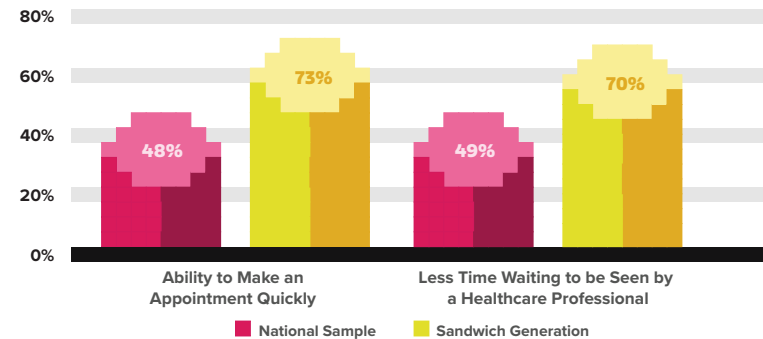
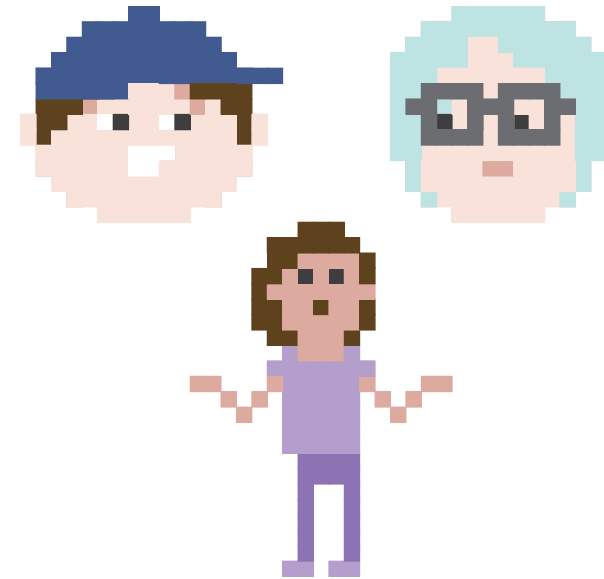


# Making up for lost time

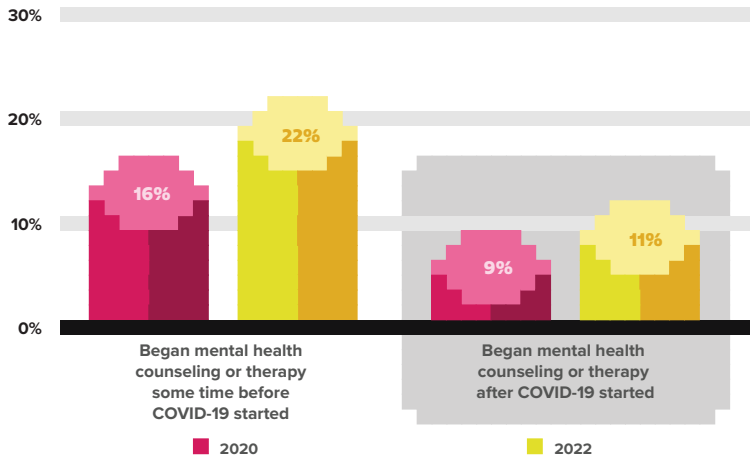
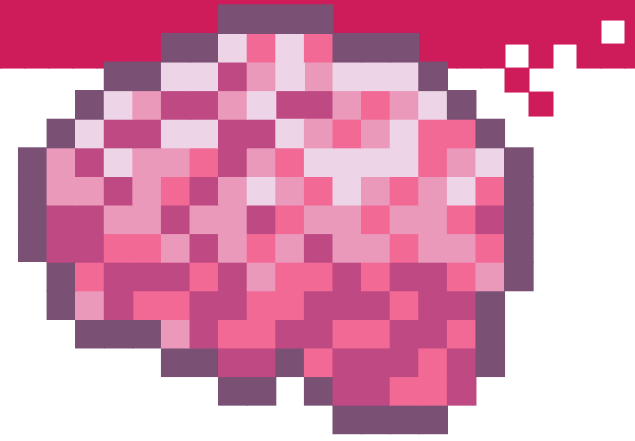
There's one group of healthcare consumers that does much of the heavy lifting when it comes to making healthcare decisions. The "Sandwich Generation," coined by The Pew Research Center, are those who have a parent aged 65 or older and are either raising at least one child younger than 18 or providing financial support to an adult child.<sup>2</sup> 54% of Americans 40-49 years old and 36% of people 50-59 years old fall into this category.

For these key healthcare decision-makers, Telehealth could be the answer to simplifying their busy lives. Among those who make healthcare decisions for both an aging mother and their children, our PULSE data shows that they are much more likely to cite Telehealth's ability to help them make an appointment more quickly than the national average. Additionally, this group is more likely than the national average to see Telehealth as a timesaver by reducing the amount of time spent waiting to be seen by a healthcare professional.

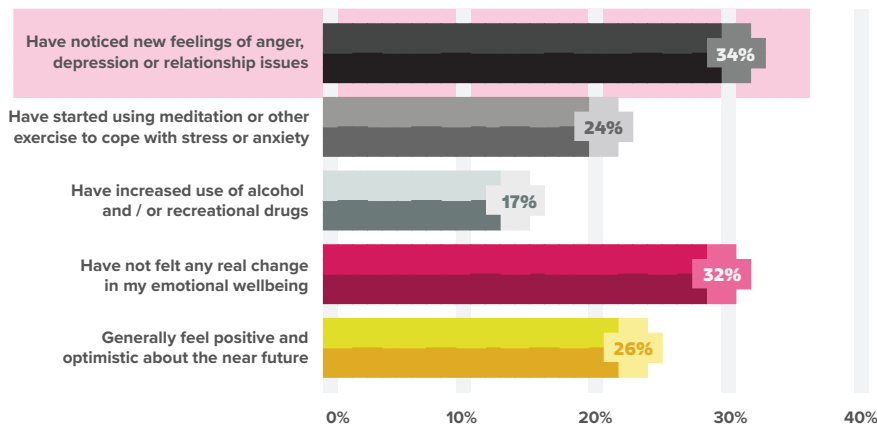
These decision-makers represent a prime target for healthcare systems given the influence they hold in their households. When targeting this group, it will be important that healthcare systems communicate Telehealth's ability to help them save time and simplify their lives without sacrificing quality of care.



PULSE 2022: n = 1,255  
Q: What, if any, are the benefits of Telehealth in your opinion?



PULSE 2022: n = 1,317  
 Q: Thinking about mental health and mental health care, which one of the following is most true for you?

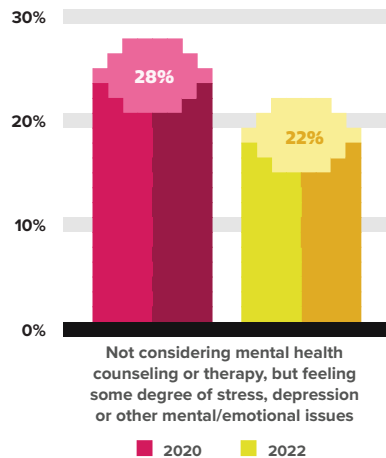


PULSE 2022: n = 1,310  
 Q: Thinking about your emotional wellbeing, which of these changes apply to you since the beginning of the pandemic?

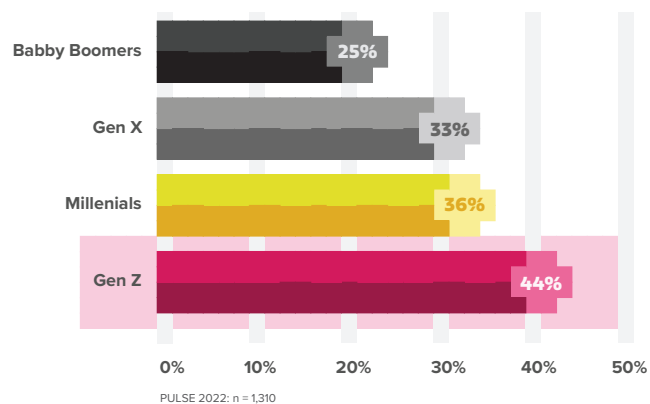
## Another door for mental health care

Throughout the course of the pandemic, people receiving mental health care has taken a step forward with more consumers receiving counseling or therapy compared to 2020 figures.

Even with increased social acceptance around seeking help for mental health, there is still hesitation from those who may need it most. 34% of consumers have noticed new feelings of anger, depression or relationship issues since the start of the pandemic. However, more than 1 in 5 consumers who deal with mental health issues are still not considering counseling or therapy.



PULSE 2022: n = 1,317  
 Q: Thinking about mental health and mental health care, which one of the following is most true for you?



PULSE 2022: n = 1,310  
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PULSE 2022: n = 1,317  
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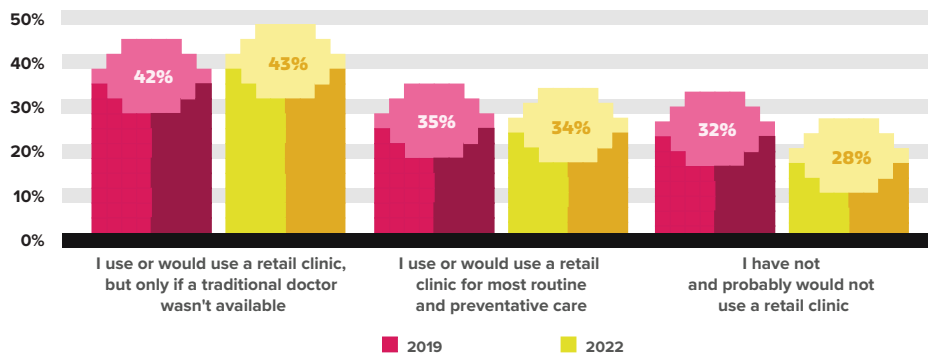
Gen Z is struggling the most, with 44% of this generation noticing new feelings of anger, depression or relationship issues. Given this statistic, it might seem that Gen Z would be the generation most open to receiving counseling. However, according to Mintel’s 2022 *Managing Stress and Mental Wellbeing* report, this may not be the case. 68% of 18–24-year-olds acknowledge that it’s hard to improve mental health on their own, yet they are the generation least comfortable talking about it. Only 68% of Gen Z feels comfortable discussing their mental health with a professional (compared to 80% of the total population),<sup>3</sup> which creates an interesting paradox.

Because there are nearly 112 million Americans who live in areas where there are inadequate mental health resources or professionals<sup>4</sup>, the need for convenience for this type of care is even more critical. Telehealth can be a great resource for this large segment of the population and allow consumers to take control of their mental health in a way that meets their needs.

Telehealth is already shining in the mental health space, with nearly half of current counseling patients continuing their mental health journeys via Telehealth vs. returning to in-person.<sup>5</sup> And according to our PULSE survey, 87% of consumers who are considering mental health care say they would feel comfortable using Telehealth, further supporting the need for healthcare systems to create or highlight this offering when possible.

# Beating the Competition

In line with their overall desire for a more convenient healthcare experience, today's consumers view retail clinics as both an alternate to a traditional doctor and a direct solution for more routine and preventative care. However, a smaller proportion of consumers is completely opposed to the use of retail clinics in 2022 than in 2019 (32% and 28%, respectively). The popularity of these facilities lies in consumers' ability to be more spontaneous than they can be with a pre-planned doctor visit, which puts more control in their hands.



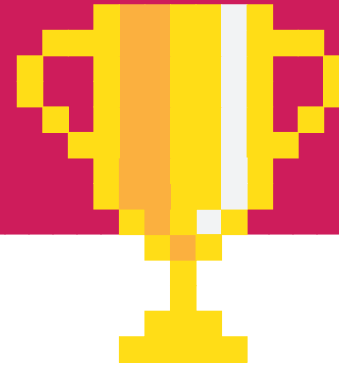
PULSE 2022: n = 1,257

Q: Retail health clinics in stores like CVS, Walgreens and Walmart provide care from a certified nurse specialist, days, evenings and weekends. Which of these statements do you agree with?

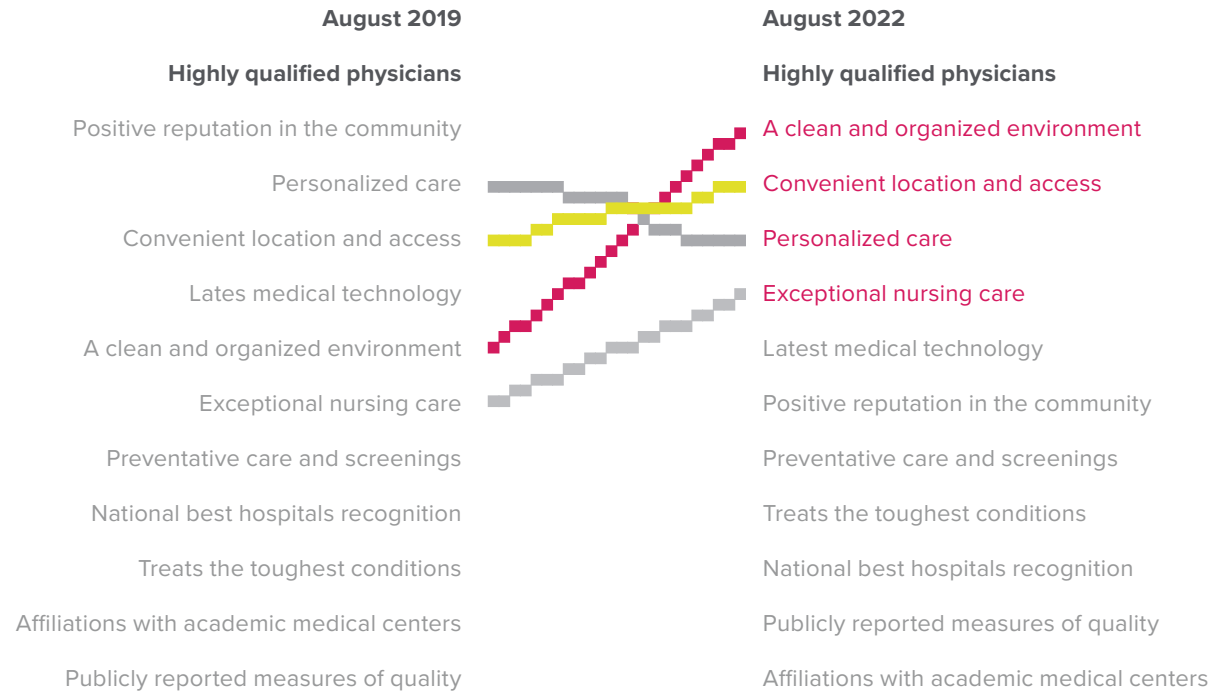
CVS has capitalized on consumer attitudes towards retail clinics by adding additional layers of convenience.<sup>6</sup> In 2021, CVS Health partnered with Teladoc® to launch Aetna Virtual Primary Care, creating a blend of physical and digital care that provides consumers with the option to seamlessly receive virtual care and prescription refills.

In addition to empowering consumers, retail clinics see surprisingly high levels of satisfaction when it comes to addressing symptoms when they first occur. According to eMarketer's *The 2022 Health Consumer*, among consumers who have used a retail clinic, 49% rated their satisfaction level as better or much better than the doctor's office.<sup>7</sup>

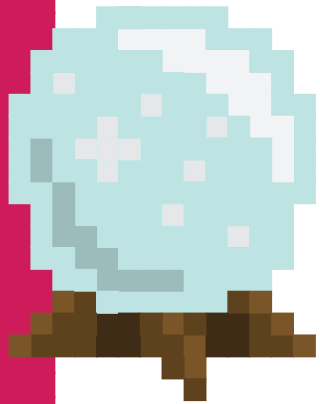




Retail clinics and big tech represent a threat to traditional healthcare systems. To remain top-of-mind among consumers, healthcare providers will need to integrate additional access and flexibility at every point in the healthcare journey. This may take shape as services like Telehealth or more flexible appointment scheduling. It's also a reminder of the importance of leveraging leadership claims and physician expertise, which consistently ranks as the most important factor for people when making healthcare decisions.



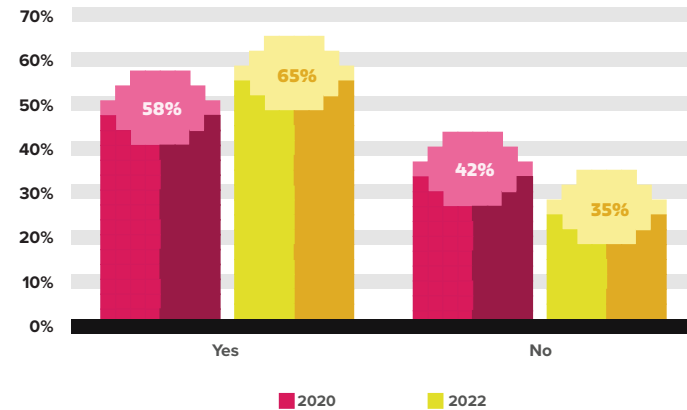
PULSE 2022: n = 1,272  
 Q: Please rank the following according to which is most important when choosing a hospital for yourself or your family.



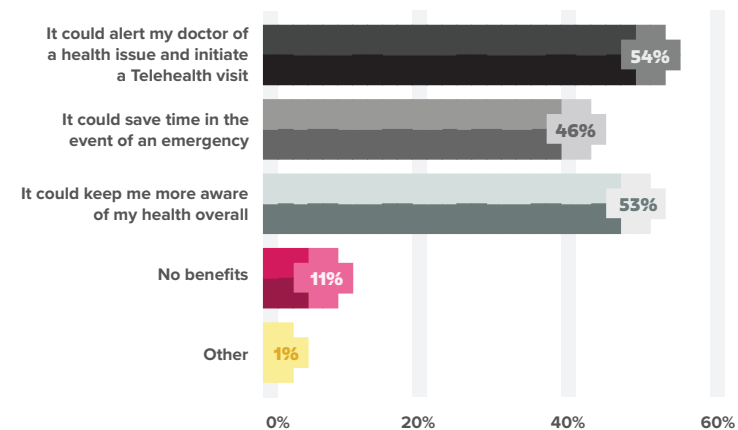
## A peek into the future

Telehealth has further opened the door to patient-facing technological innovations in healthcare, like wearable tech. Over the last 3 years, consumers' attitudes towards tracking their health data improved, with 65% of individuals feeling comfortable with the idea of using wearable tech (vs. 58% in 2020). They see technology like the Apple Watch or Fitbit as a useful tool in monitoring their health. Additionally, providing remote monitoring results to their trusted physician is viewed positively, as it provides a greater convenience.

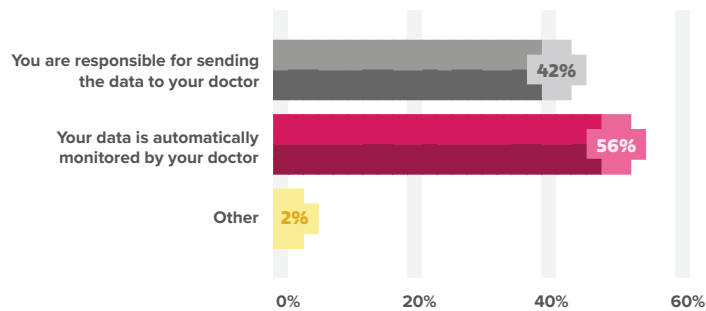
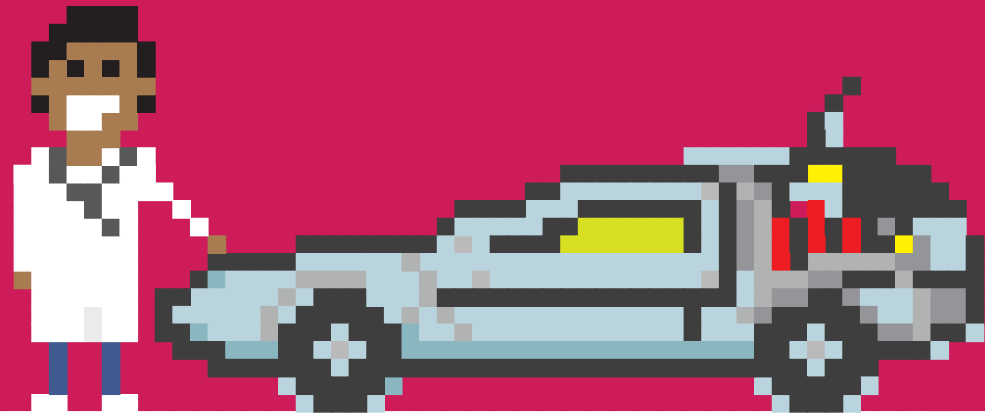
With such a positive sentiment around wearable technology, the conversation has now shifted to how consumers can take advantage of these tools to be more connected to their health journey. More than half of respondents agreed that the greatest advantage to sharing their health information this way is that it could alert their doctor of any health issues.



PULSE 2022: n = 1,236  
Q: Do you see wearable technology like an Apple Watch or a Fitbit as a useful tool in monitoring your health?



PULSE 2022: n = 1,231  
Q: What do you think the benefits might be of sharing the data from your wearable tech with your doctor?

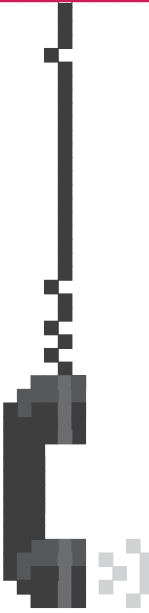


PULSE 2022: n = 1,231  
 Q: In terms of how the data from your wearable tech is shared with your doctor, which would you prefer?

Moving forward, consumers are looking to the next phases of wearable technology to allow them to work with their physicians to create personalized plans for their needs. A majority of consumers were open to having their health information automatically monitored by their doctor. However, the responsibility of leveraging their data now shifts to physicians. This is supported by the *NRC Health 2021 Healthcare Consumer Trends Report*, which indicates that only 50% of providers are asking patients for their data from wearable technology.<sup>8</sup>

As consumers come to expect a more seamless experience across virtual and physical health experiences, wearable technology will hold the key to help physicians make informed recommendations for their patients. As this space continues to grow, the possibilities remain limitless, and puts consumers in the driver seat.

# LET'S REHASH



Telehealth has established its position as a big piece of healthcare's future, with consumer behavior hinting at sticking with virtual healthcare options, even post-pandemic. Although consumers are eager to return to pre-pandemic lifestyles, they'd like to keep the convenient alternatives for necessities such as healthcare. Telehealth offers control, convenience, and access – which consumers from every generation want. Moving forward, the implementation and seamless integration of Telehealth won't just be an added benefit, it'll be cost of entry in the new consumerism of healthcare.

Interested in checking out some of our past PULSE Reports? We don't blame you. Visit [www.laughlin.com/pulse-report](http://www.laughlin.com/pulse-report) to explore reports and topics from over the years.

## Drop us a line

Laughlin Constable is here to help. If you are a healthcare marketer looking to resonate with today's consumers, we would love to partner with you to put the insights from this report into action!

### Contact Us

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414-270-7175



# Our healthcare chops

Laughlin Constable Inc. is a full-service, independent advertising and brand experience agency. Our mantra – our business creates ideas, our ideas create business – along with our focus to leverage technology to elevate creativity and ultimately drive our clients’ growth no matter the industry guides how we approach client relationships.

Although our client roster features a little bit of everything (we believe working in diverse verticals informs more well-rounded thinking for our clients), our healthcare marketing expertise is deep. We have decades of experience in the healthcare space, including hospital systems, pharmaceuticals, nonprofits and device manufacturers. We’ve also been an active member of the Society for Healthcare Strategy and Market Development (SHSMD) since 2007, acting as committee members and presenters at its annual conferences.

## Works Cited

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