



Do Patients Trust Telemedicine?

2015 TRENDS IN VIRTUAL HEALTHCARE SERVICES



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About This Study

The original data contained in this report comes from a nationwide internet survey of U.S. adults, which was conducted from June 22-24, 2015. The survey was designed by TechnologyAdvice Research, and conducted by Google Consumer Insights. A total of 504 U.S. adults (age 18 and over) were surveyed about their preferences and feelings regarding telemedicine services. Where necessary, results are weighted to be representative of the U.S. internet population.

Introduction

Telemedicine is one of the most promising frontiers in modern healthcare. Virtual appointments with physicians, conducted over video or even by phone, can help alleviate the strain on general practitioners, further preventative care, and reduce overall costs. Major companies such as Rite Aid are already laying the infrastructure for nationwide systems.

In order for telemedicine to live up to its promise, however, patients must first embrace it. While the medical community has shown support for telemedicine, we wanted to investigate whether the idea of virtual appointments is widely accepted among the general populace. In order to answer this, TechnologyAdvice Research surveyed a total of 504 U.S. adults about whether they would be comfortable using a telemedicine service, whether they would trust a virtual diagnosis, and what factors might make them more inclined to use such systems.

The answers to these questions can help healthcare providers better appeal to potential patients, and alleviate concerns over the reliability or use of virtual appointments.

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Executive Summary

Respondents showed a number of hesitations about telemedicine, both in regards to using remote services and the quality of diagnoses made during such appointments. Only 35.3 percent of people said they would be likely to choose a virtual appointment over an in-person one. Improving this number will be crucial to the long-term success of telemedicine.

Some of the current hesitation towards these services may be tied to confusion about how the services work, along with patient age. When asked how much they would trust a virtual diagnosis, more than half (54.1 percent) of respondents over 65 years old said “I would not trust a virtual diagnosis.” Just 16.9 percent of 18-24 year olds said the same thing. Similarly, a combined total of 62.6 percent of people said they would be somewhat or much more likely to schedule a virtual appointment if they had previously seen the doctor in-person. This suggests there may be concerns about the quality of physicians on telemedicine platforms.

We also found multiple opportunities for healthcare providers and vendors to increase the appeal of telemedicine services. Approximately 70 percent of respondents said they would be more likely to use a video-based telemedicine service if it offered one of the following four advantages: more convenient scheduling options, lower cost, less time spent in the waiting room, or the ability to conduct appointments from home. Many current systems can already offer these benefits, which suggests there is a large, existing audience for telemedicine services if vendors can effectively highlight the benefits.

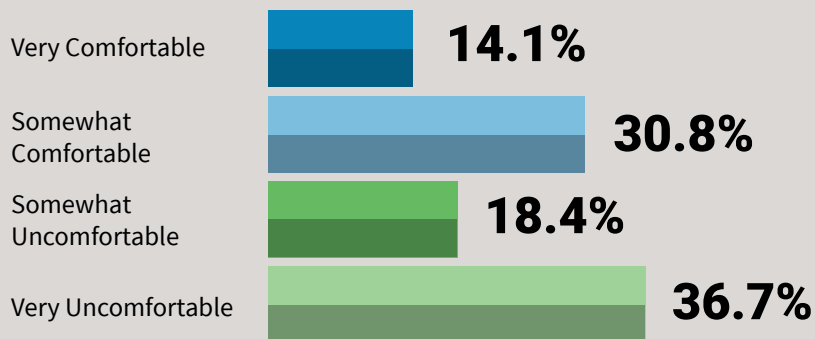
Key Findings

- 55.9% of people would be somewhat or very uncomfortable with conducting a doctor's appointment via telemedicine
- Just 35.3% of people would be likely to choose a virtual appointment over an in-person one
- Approximately 75% of people would not trust a virtual diagnosis, or would trust it less than an in-person one.
- 51.8% of people said that more convenient scheduling options or lower cost would make them more likely to use a telemedicine service
- 65% of people would be more likely to conduct a virtual appointment if they had previously seen the doctor in-person
- 63.5% of people would be comfortable conducting a virtual appointment at home, but only 7.5% would be comfortable doing so from a retail kiosk

Hesitations about Telemedicine

In order to gauge general acceptance of telemedicine, respondents were asked whether they would be comfortable conducting a doctor's appointment through a video-based telemedicine platform.

How Patients Feel About Attending Virtual Appointments



A combined 44.9 percent of respondents said they would be somewhat or very comfortable with such an appointment, while 55.1 percent said they would be somewhat or very uncomfortable with it.

Those who are unsure about telemedicine also seem to feel more strongly about it than those who are comfortable with remote appointments. Just 14.1 percent of people said they would be very comfortable with a virtual appointment, compared to 36.7 percent who said they would be very uncomfortable. Most people who said they were comfortable with telemedicine fell into the “somewhat comfortable” grouping.

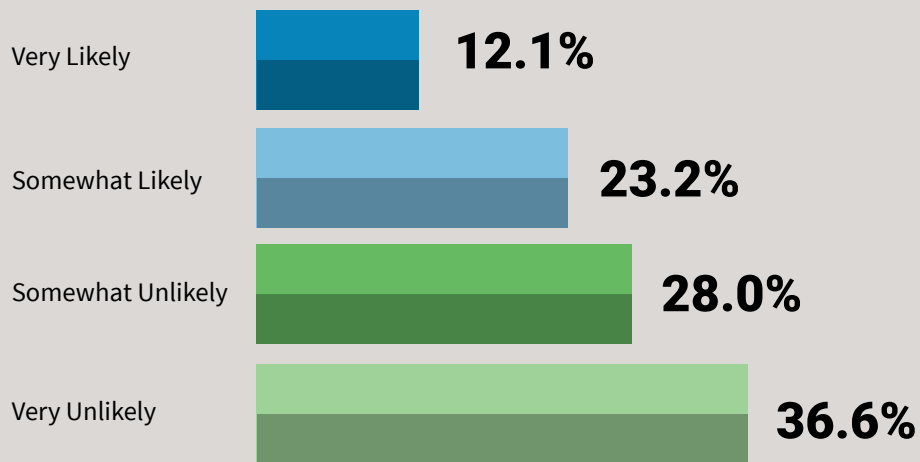
This is likely due to how new telemedicine is to many patients, and the emerging nature of the technology. Patients who are familiar with existing services (such as Teladoc or Doctor on Demand) may only have recently discovered them. Those who are uncomfortable with them (the majority) likely haven't come into direct contact with the systems.

Telemedicine currently accounts for only a small percentage of doctor's appointment in the U.S. The fact that 45 percent of people would already be comfortable using a video-based service should be seen as a promising sign.

Virtual vs. In-Person

Going beyond people's general familiarity with telemedicine, we wanted to investigate whether people would pro-actively choose a virtual appointment over an in-person appointment.

How Likely Patients Would Be to Schedule a Virtual Appointment



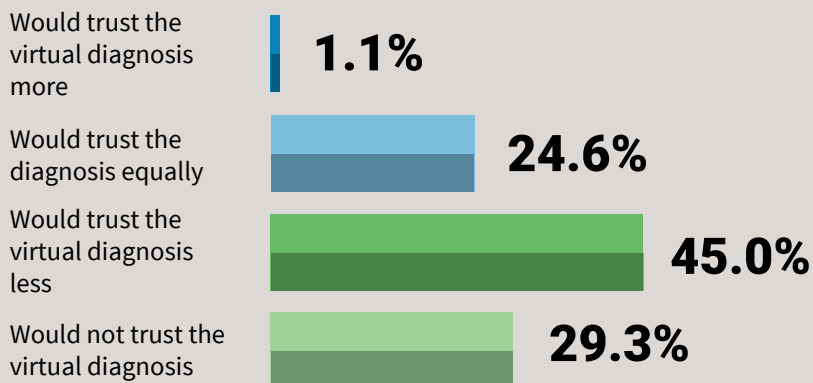
Right now, most people would not choose to have a virtual, video appointment with their doctor. A combined 64.6 percent of respondents said they would be somewhat or very unlikely to choose a video appointment, while just 35.4 percent said the opposite.

In order for telemedicine to make a meaningful impact on American healthcare, patients will need to not only become familiar with the concept, but also recognize the benefits it can offer over traditional appointments. The current hesitation is likely due in part to concerns about the effectiveness of video appointments and the range of services offered. Physicians and telemedicine providers will need to actively promote their services to counter these feelings.

Trust Issues

In addition to general hesitations about telemedicine, many people do not fully trust the ability of physicians to diagnosis problems during remote appointments.

To Which Degree Patients Would Trust a Virtual Diagnosis



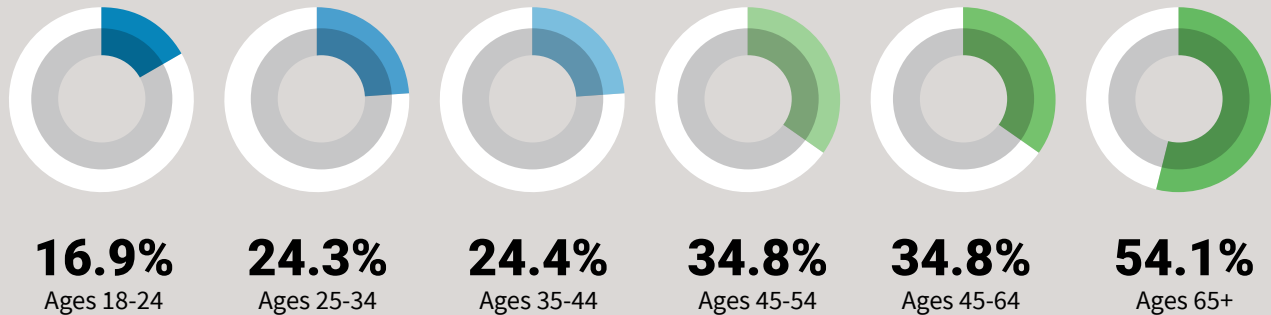
While it's not surprising that only 1.1 percent of people said they would trust a virtual diagnosis more than an in-person one, less than a quarter of respondents (24.6 percent) even trusted them equally.

Forty-five percent said they would trust a virtual diagnosis less, while 29.3 percent said they wouldn't trust a virtual diagnosis at all. That means approximately 75 percent of people either wouldn't trust a diagnosis made via telemedicine, or would trust it less than one that was made in-person.

This is perhaps the largest issue that telemedicine vendors and healthcare providers will need to overcome. If patients don't trust the diagnoses made during telemedicine calls, they may ignore the advice given, fail to take the proper preventative steps, or seek additional in-person appointments (defeating much of the point of telemedicine).

One potential bright spot for the industry is the age breakdown among respondents who chose the answer "I would not trust a virtual diagnosis."

Percent of Patients That Wouldn't Trust a Virtual Diagnosis, by Age



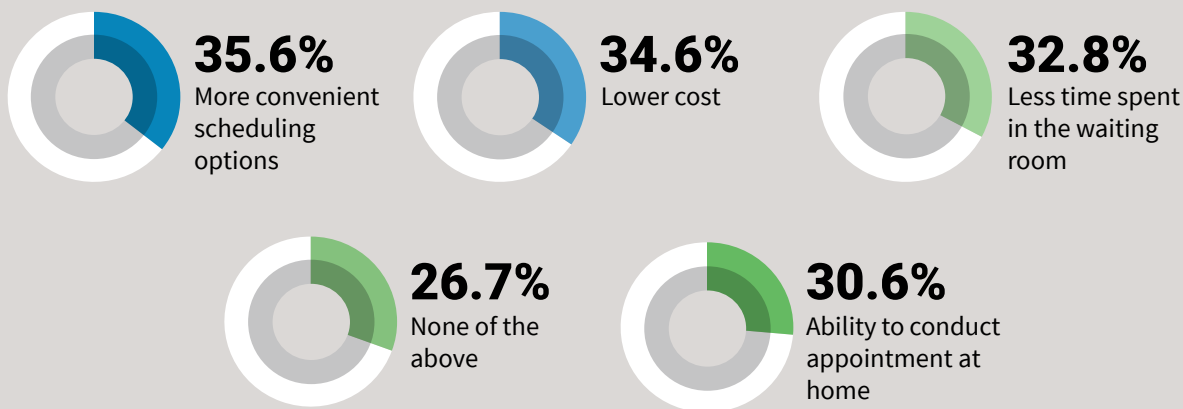
While younger respondents were no more likely than others to indicate that they trusted virtual diagnoses over in-person ones, they were much less likely to say that they didn't trust them at all. Only 16.9 percent of 18-24 year old respondents (and 24 percent of 25-44 year olds) said they wouldn't trust such diagnoses. That's in comparison to 54.1 percent of respondents aged 65 and older.

These results are not statistically significant (due to the small sample size of this single-response breakdown), but do suggest that younger patients are less skeptical of virtual diagnoses. Physicians and vendors should consider targeting their marketing resources towards this more receptive demographic.

Incentives

Along with determining people's trust in telemedicine, we also looked at how healthcare vendors and providers could incentivize patients to adopt these services. From the responses, it appears there are multiple marketing angles that could push patients towards virtual appointments.

Why Patients Would Choose Virtual Appointments



Among potential factors that would make them more likely to use a telemedicine platform, “more convenient scheduling options” and “lower cost” were the two most popular options. Both of these reasons are some of the current benefits of telemedicine, indicating that such services will likely be well-received as they become more known. 32.5 percent of people said being able to spend less time in the waiting room would make them more likely to choose a virtual appointment, and over a quarter (26.7 percent) cited the ability to conduct the appointment at home.

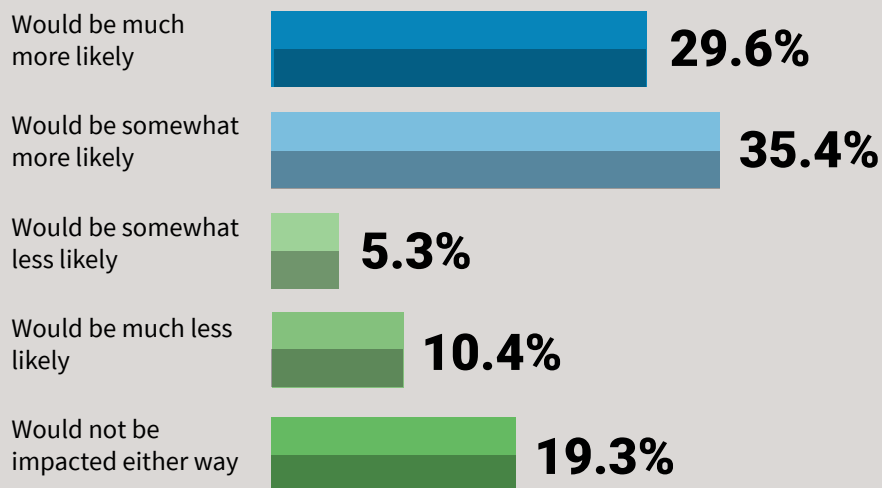
A total of 69.4 percent of respondents said that at least one of the four listed factors would make them more likely to choose a virtual appointment. This suggests there does exist a large, receptive audience for telemedicine services that simply needs convincing.

30.6 percent of respondents chose “None of the above,” indicating either a firm opposition to the idea of telemedicine, or a desire for other options/incentives. With any new technology there is likely to be some percentage of people who will not adopt it, regardless of the benefits. We expect that this percentage is currently elevated due to the personal nature of doctor's visits, concerns over information security, and the “newness” of these services. It will likely decline as people become more familiar with the uses, benefits, and even potential drawbacks of telemedicine platforms.

Virtual Follow-Ups

To help determine whether people's hesitation over telemedicine is due to the platform and concept itself, or is caused by uncertainty over issues such as physician choice, we asked respondents whether they would be more likely to conduct a virtual appointment if they had first seen the physician in-person.

How Likely Patients Would Be to Conduct a Virtual Follow-Up



Encouragingly, 65 percent of respondents said they would be somewhat or much more likely to use a virtual appointment system if they had first seen the doctor in-person. Just 15.7 percent said they would be less likely.

This suggests much of the hesitation about telemedicine may stem from patient fears over lack of physician choice, or lack of familiarity with the doctor they

see. This can likely be eased through a combination of educational materials, clear explanations about how much physician choice is offered, and the ability to see the same physician for multiple appointments.

While not all telemedicine services offer these capabilities, the ones that do should find a receptive market for their more personalized, patient-centric approach.

Location

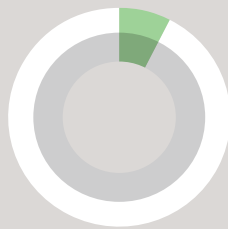
To find out where patients want to conduct telemedicine appointments, we surveyed respondents about where they would feel comfortable having a video-based doctor's visit.

Where Patients Feel Comfortable Conducting Telemedicine Visits



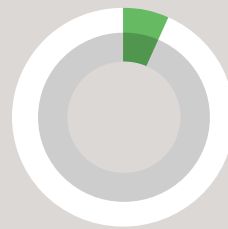
63.5%

At home, with a computer or mobile device



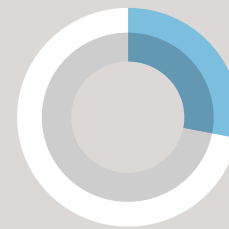
7.5%

At a dedicated kiosk in a retail location



6.9%

At work, in a dedicated kiosk



28.6%

None of the above

63.5 percent of respondents said they would feel comfortable conducting a virtual appointment from their own home. Only 7.5 percent said they would feel comfortable doing so from a dedicated kiosk in a retail location, and just 6.9 percent said so about a kiosk located in their workplace.

28.6 percent of respondents chose “none of the above” - a similar percentage to those who said there were no factors that would make them more likely to use telemedicine services. This likely represents the most ardent objectors to virtual appointments, although we suspect the percentage will fall as the technology becomes more available.

The fact that less than 10 percent of people would feel comfortable using a kiosk in a retail location (or at work) likely reflects the personal nature of medical visits, and lingering privacy fears. It also suggests that stores such as Rite Aid and Wegmans — which have begun trials of telemedicine kiosks — may have a hard time attracting initial customers. Part of the current hesitation may be due to misconceptions over the privacy of these kiosks, or simply a lack of familiarity with the technology. As more patients use kiosks, acceptance may improve.

Conclusion

The American healthcare system faces an increasing shortage of general practitioners and ever more crowded emergency rooms. Reliable access to basic and preventative care is widely seen as a way to alleviate this strain, yet many Americans lack convenient access to a physician. Telemedicine is a promising solution to this problem, but current systems must first overcome existing hesitations about virtual services.

To better incentivize the use of such services, telemedicine vendors and healthcare providers need to more effectively explain the benefits of these appointments, and advertise the advantages over in-person visits. In particular, the lower cost of telemedicine services and more flexible scheduling are likely to resonate with many patients.

Clarifying whether patients can pick the physician they see, and whether they can keep the same physician, should be a priority for vendors. Many people expressed doubt over the quality of virtual diagnoses, which likely reflects concerns over both what these systems can be used for and the qualifications of the physicians. Educational material combined with clear marketing should help allay these fears.

If patients can be convinced that telemedicine provides an experience comparable to an actual visit — at least for preventative questions — there appears to only be a small amount of intrinsic opposition to virtual systems. Overcoming these concerns will be crucial for the long term success of the industry.

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