

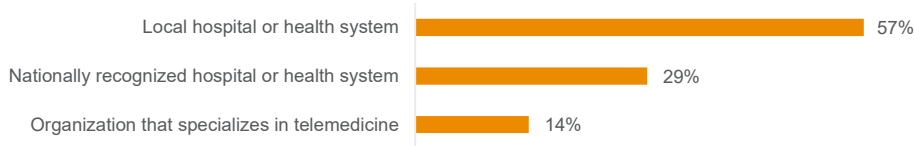
NRC HEALTH MARKET INSIGHTS – OCTOBER 2021

Insight of the Month: Virtual Health

Virtual health has evolved from the historical nurse line into a much more complete set of healthcare offerings and ways of enhancing a healthcare experience for both the patient and the provider. COVID-19 created a period of increased usage and we have not seen that usage decrease since the introduction of vaccines nearly a year ago. Almost half (46%) of consumers have indicated they have utilized an e-visit in the past, up from 11.3% at the beginning of 2020. Virtual health will continue to evolve even though the majority of consumers (35%) still prefer to do an in-person visit if they have the option. A personal touch is even more important during virtual visits as local hospital and health systems are preferred to Nationally recognized or organizations which specialize in telemedicine.

Most preferred for virtual health

Q) If the cost were the same, from which of the following types of organization would you most prefer to receive virtual health?



Top benefits and concerns for virtual health

Q) Which *benefits/concerns* (separate questions) of virtual healthcare visits would most influence your decision to use a virtual visit over an in-person doctor visit? (multi select)

Benefits

- I don't have to drive to my doctor's office (40.8%)
- Comfortable/convenient location (39.4%)
- Prescription can be sent to a local pharmacy (36.6%)
- Avoid possible sick people (35.6%)

Concerns

- Examinations may not be as complete (51.1%)
- I would rather speak to someone face-to-face (39.6%)
- A doctor visit online or by phone feels impersonal (24.5%)
- Lack of access to my usual provider (22.2%)

How consumers prefer to use virtual health

Q) Which of the following best describes how strongly you feel about using virtual healthcare?

