

VIRTUAL CARE HAS BECOME INTEGRAL TO CARE DELIVERY

A June 2022 study among US adults with health insurance confirmed that perceptions of **convenience** and **affordability** translate into long-term adoption and willingness to utilize virtual care in new use cases.



HOW CONSUMERS ACCESS TELEHEALTH:

Video is still popular, and text is increasing.



Those who use telehealth benefits report **HIGHER SATISFACTION** with their health plans than those unaware of telehealth coverage.

MARKETING CONSIDERATIONS FOR DIFFERENT MEMBER POPULATIONS

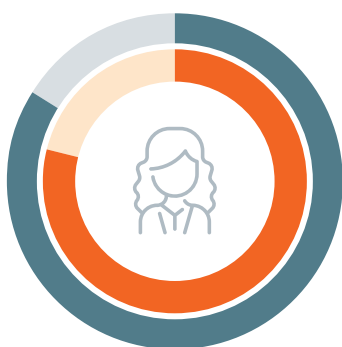
Virtual care has continued to grow in awareness and adoption, especially among the groups below who have seen higher openness or usage growth.

GROUPS OPEN TO USING AND HAVE USED VIRTUAL CARE:

Millennial Moms

84% OPEN TO USING

79% HAVE USED



Patients With Chronic Conditions

75% OPEN TO USING

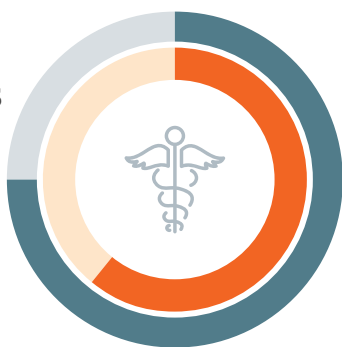
71% HAVE USED



Medicaid Members

75% OPEN TO USING

61% HAVE USED



Hispanics/Latinos

71% OPEN TO USING

65% HAVE USED



VIRTUAL CARE DRIVERS: MEETING DIVERSE CONSUMER NEEDS

Routine/Primary Care

OPEN TO USE: **58%**

HAVE USED: **31%**

Top Driver: Care with no long waits in waiting room

Behavioral Health

OPEN TO USE: **57%**

HAVE USED: **25%**

Top Driver: Care from the comfort of home

Urgent Care

OPEN TO USE: **56%**

HAVE USED: **23%**

Top Driver: Faster diagnosis and treatment

Dermatology

OPEN TO USE: **51%**

HAVE USED: **15%**

Top Driver: Faster diagnosis and treatment

While virtual care use has increased meaningfully, there are still significant opportunities to reach members who are open to using it but haven't yet tried a virtual option.

KEY MARKETING MESSAGES: MOTIVATIONS & BARRIERS

TOP DRIVERS

- No waiting rooms
- Avoid germs

TOP BARRIERS

- Fear of diagnostic accuracy
- Prefer to see the same doctor (continuity of care)



Barriers are becoming less prominent across the board, with two-thirds of telehealth users being repeat visitors

INSIGHTS TO DRIVE ENGAGEMENT WITH MEMBERS



Virtual care is convenient and cost-effective



No commutes or long wait times



Younger consumers appreciate quality care to manage their health; need reassurance on coverage and cost



Older consumers appreciate faster care and less hassle; need reassurance the doctor will understand their background

WHERE DO CONSUMERS ACROSS AGES SEEK INFORMATION ABOUT VIRTUAL CARE?



Older members: Health insurance companies and PCPs are very important sources of information to understand their virtual care benefits.



Younger members: Online searches and reviews help influence them.

VIRTUAL CARE INFO SOURCES	TOTAL*	AGES 25-34	AGES 35-44	AGES 45-64	AGES 65+
MY HEALTH INSURANCE COMPANY	47%	Less important	Less important	Less important	Very important
MY PRIMARY CARE PROVIDER	54%	Less important	Less important	Important	Very important
ONLINE SEARCH AND REVIEWS	34%	Less important	Less important	Important	Important

*TOTAL RESPONDENTS AGES 18-65+ Less important information source Important Very important information source

THE VIRTUAL CARE SERVICES CONSUMERS ARE MOST OPEN TO USING:

