MDLIVE

CONSUMER INSIGHTS

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.

88% Say care quality is the same or better quality than in-person care.

44% Would choose a Virtual-First plan if premiums were 10% lower.

80% Have greater expectations for what they can get out of telehealth.

44% Say telehealth reduced their health expenses.

HOW CONSUMERS ACCESS TELEHEALTH:

Video is still popular, and text is increasing.

- **71%** VIDEO
- **33%** ONLINE CHAT
- **33%** TEXT

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%	Important	Important	Important	Very important information source
MY PRIMARY CARE PROVIDER	54%	Less important information source	Important	Very important information source	Very important information source
ONLINE SEARCH AND REVIEWS	34%	Important	Important	Less important information source	Less important information source

*TOTAL RESPONDENTS AGES 18-65+

Less important information source · Important · Very important information source

THE VIRTUAL CARE SERVICES CONSUMERS ARE MOST OPEN TO USING:

- Urgent Care
- Routine Care
- Behavioral Health
- Wellness Screening

Consumers across all age groups are looking to virtual care for **routine care needs,** demonstrating an increasing openness to wellness screenings.

Behavioral health services are especially important to the younger audience.

	AGES 25-34	AGES 35-44	AGES 45-64	AGES 65+
1	Behavioral Health	Wellness Screening	Routine Care	Routine Care
2	Wellness Screening	Routine Care	Urgent Care	Wellness Screening
3	Routine Care	Urgent Care	Wellness Screening	Urgent Care

Note: All insights among ages 18-65+ with health insurance except where noted. Source: MDLIVE Telehealth A&U Study (June 2022)

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