How Covid-19 Has Changed Consumer Virtual Visit Utilization and Preferences

Findings from Our June 2020 Survey

Presented by
Market Innovation Center

Survey overview

Overview

Between May 26 and June 8, 2020, we surveyed more than 7,000 adult consumers (aged 18 to 93) on how Covid-19 has changed their health care behaviors and preferences. The survey included 29 questions and assessed topics including:

- Consumer anxiety levels and personal impact of Covid-19
- Factors influencing comfort seeking health care services
- Communication and site of care preferences
- Virtual visit preferences for different types of services

What's clear: Covid-19 has changed the way consumers want to engage with the health care system and what they expect from their providers.

REPORT CONTENTS

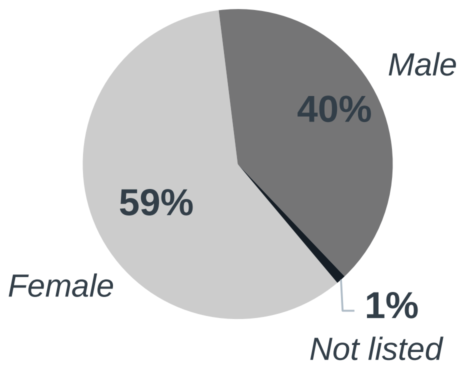
We are publishing the results of the survey in two separate reports:

- **Virtual Visit Utilization and Preferences** (this report)
- Site of Care and Communication Preferences (separate report)

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

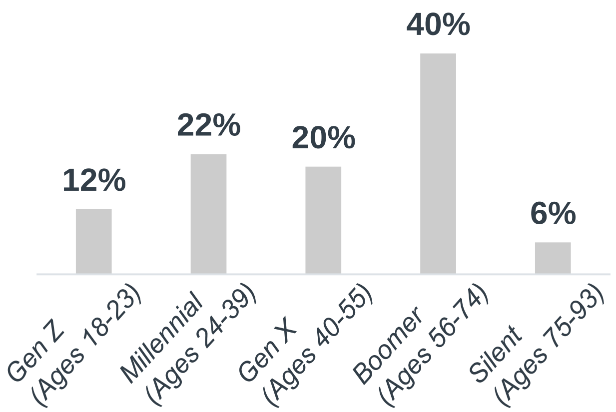
Survey respondent profile

Gender



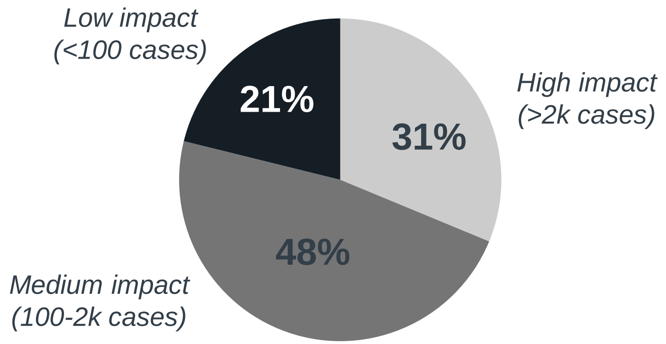
Age

By generation

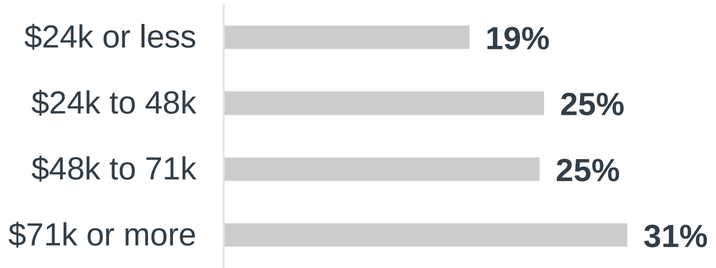


Covid-19 Outbreak Severity

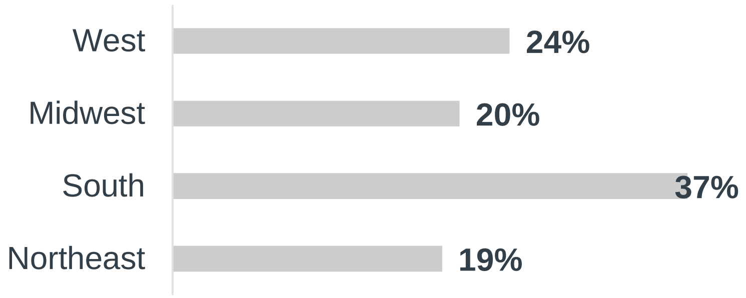
By cases in county



Income



Region



1. n=7,452

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Summary of key findings

1. **Virtual visit utilization increased 53% from pre-pandemic levels.** 19% of consumers had used a virtual visit prior to the pandemic, while 29% used one during the pandemic. Though a greater proportion of Gen Zers (40%) and Millennials (37%) used a virtual visit during the pandemic, at least a quarter of each generational cohort tried one during this time. Of all virtual visit users, 55% have used phone visits, 55% have used video visits, and 17% have used secure messages. 27% have used more than one modality.

2. **Of the 19% of consumers who tried a virtual visit for the first time during the pandemic, 47% were Baby Boomers.** Their utilization of virtual visits increased 155%—jumping from 9% to 23%. Millennials and Gen Xers together accounted for another 35% of new users. First-time users were also more likely to use health care services primarily for prevention and monitoring, and have incomes greater than $71,000 a year. Knowing someone impacted by Covid-19 did not increase the likelihood of using a virtual visit during the pandemic.

3. **Interest in trying virtual visits has increased substantially since 2017—across all demographics and all health care services assessed.** Across services, women, those with chronic conditions requiring frequent care, and those with higher incomes report being slightly more likely to consider virtual visits. When it comes to using virtual care to seek a second opinion, adults over 56 display a striking preference for virtual consultations over driving to see another provider. For pregnancy care, knowing someone impacted by Covid-19 appears to increase the likelihood of considering virtual care.

4. **60% of all consumers would consider a virtual visit if they had to wait at least a day to see their regular provider in person**. As wait time increases, so does openness to trying virtual. Additionally, as age increases, wait time tolerance for in-person visits decreases. 75% of consumers older than 74 would shift to virtual care if they had to wait two weeks to see their regular provider, relative to 37% of consumers aged 18-23.

5. **Seeing a familiar provider increases consumer comfort with virtual visits—especially for behavioral health.** When given the option to see a known provider versus a new provider via virtual platforms, consumers prefer seeing the known provider. This preference is most pronounced for the youngest consumers (those 18-23) and oldest consumers (those over 74).

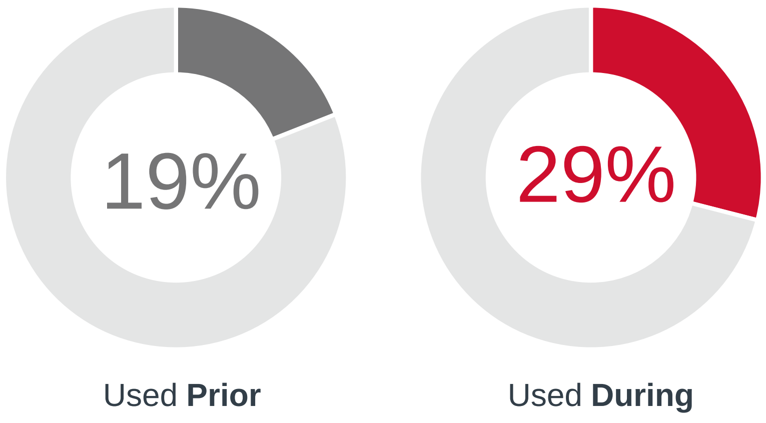
Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Virtual visit use increased substantially during Covid-19

Baby Boomers accounted for the greatest proportion of new users

Virtual visit use before and during Covid-19

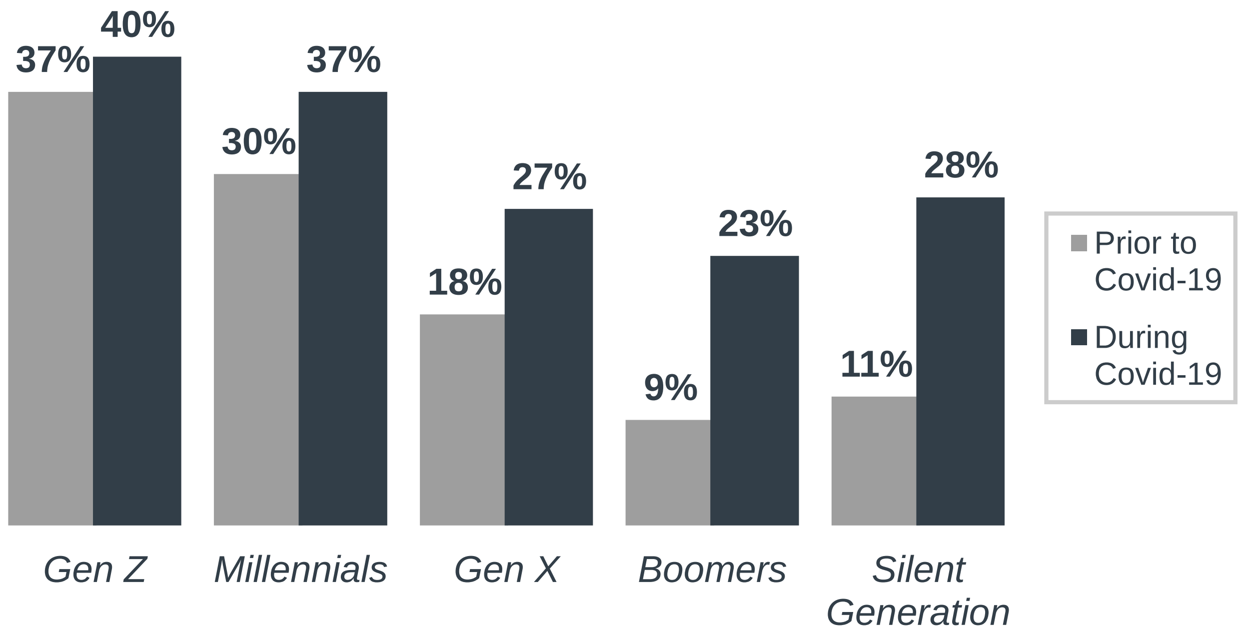
n=7,452



Of virtual visit users, **55%** have used phone visits, **55%** have used video visits, and **17%** have used secure messages. **27%** have used more than one modality.

Virtual visit use across generational cohorts

n=7,452



Gen Z	Millennials	Gen X	Boomers	Silent Generation	
10%	**18%**	**17%**	**47%**	**8%**	Percent of new users *n=1,133*

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

1 in 5 virtual visits during Covid-19 completed by new users

First time users more likely to use health care for prevention, have higher incomes

DATA SPOTLIGHT

19%

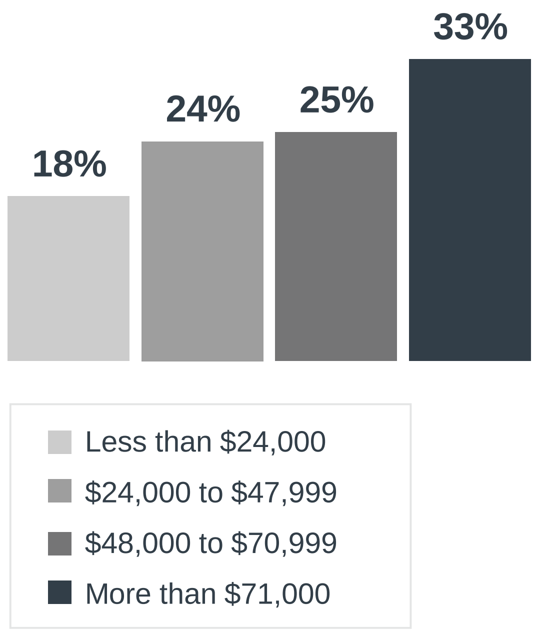
Of consumers who used a virtual visit during the pandemic were new to telehealth

63%

Of consumers who tried a virtual visit for the first time during the pandemic were women

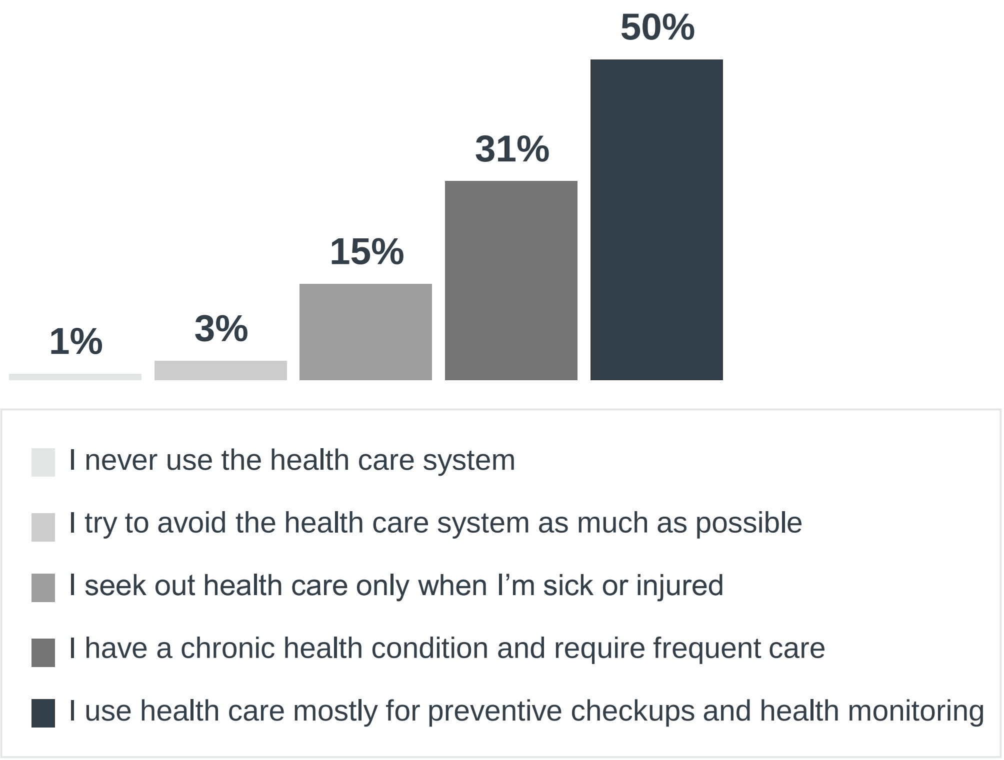
New telehealth users by income

n=1,133



New telehealth users by health status

n=1,133



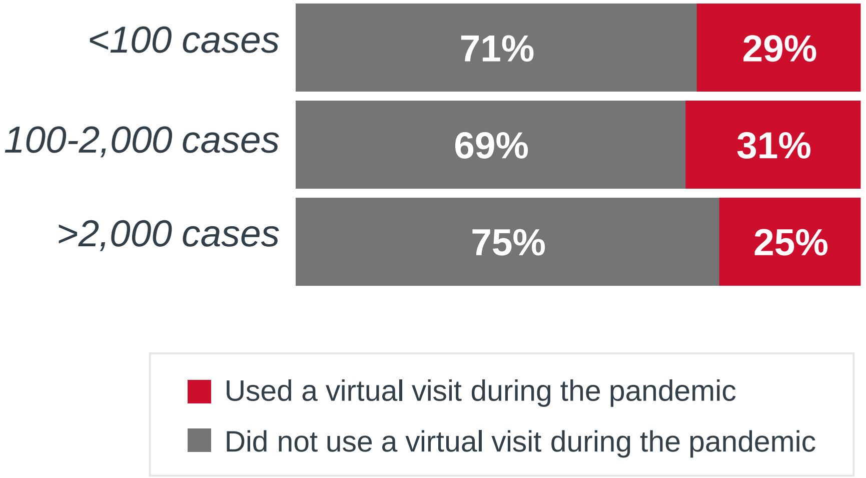
Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Severity of local outbreaks did not affect telehealth use

Income and gender didn't change the likelihood of using telehealth, either

Total telehealth users by area infection rates

n=7,452



Other factors that did not affect virtual visit use amid Covid-19

Percentage in each cohort who have used a virtual visit during the pandemic (includes new and existing users)

Region

- South (30%)
- Northeast (31%)
- West (27%)
- Midwest (28%)

Income

- Less than $24,000 (29%)
- $24,000 to 47,999 (30%)
- $48,000 to 70,999 (30%)
- Greater than $71,000 (28%)

Gender

- Male (29%)
- Not listed (27%)
- Female (29%)

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Most now prefer virtual visit over 1-day wait for in-person care

Consumers now have less patience than they did in 2017 for even short waits

Consumers who would consider a virtual visit if in-person visit requires a wait

Wait time for in-person visit	One day	One week	Two weeks	One month	Office Closed[1]
2017 National (n = 4,879)	34%	51%	56%	59%	44%
2020 National (n = 7,452)	60%	63%	65%	66%	61%
Percent Change from 2017 to 2020	**+76%**	**+24%**	**+16%**	**+12%**	**+39%**

1. Regular provider's office is closed.

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Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Wait time tolerance for in-person visits decreases with age

Consumers over 40 are the most likely to consider a virtual visit to avoid a wait

Consumers who would consider a virtual visit if in-person visit requires a wait

Higher than 2020 national average

Wait time for in-person visit

n=7,452

	One day	One week	Two weeks	One month	Office Closed[1]
Gen Z *(Ages 18-23)*	59%	48%	37%	49%	49%
Millennials *(Ages 24-39)*	62%	61%	51%	56%	61%
Gen X *(Ages 40-55)*	61%	64%	59%	67%	62%
Boomer *(Ages 56-74)*	59%	67%	67%	78%	64%
Silent Generation *(Ages 75-93)*	59%	69%	75%	86%	67%

1. Regular provider's office is closed.

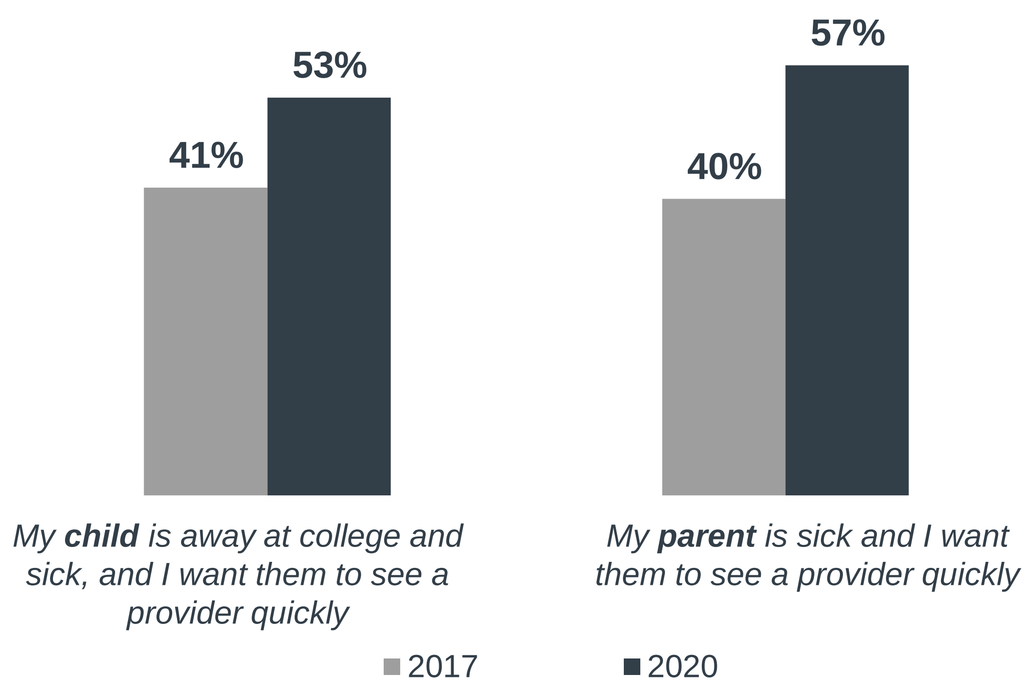
Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Interest in virtual visits for children and parents increased

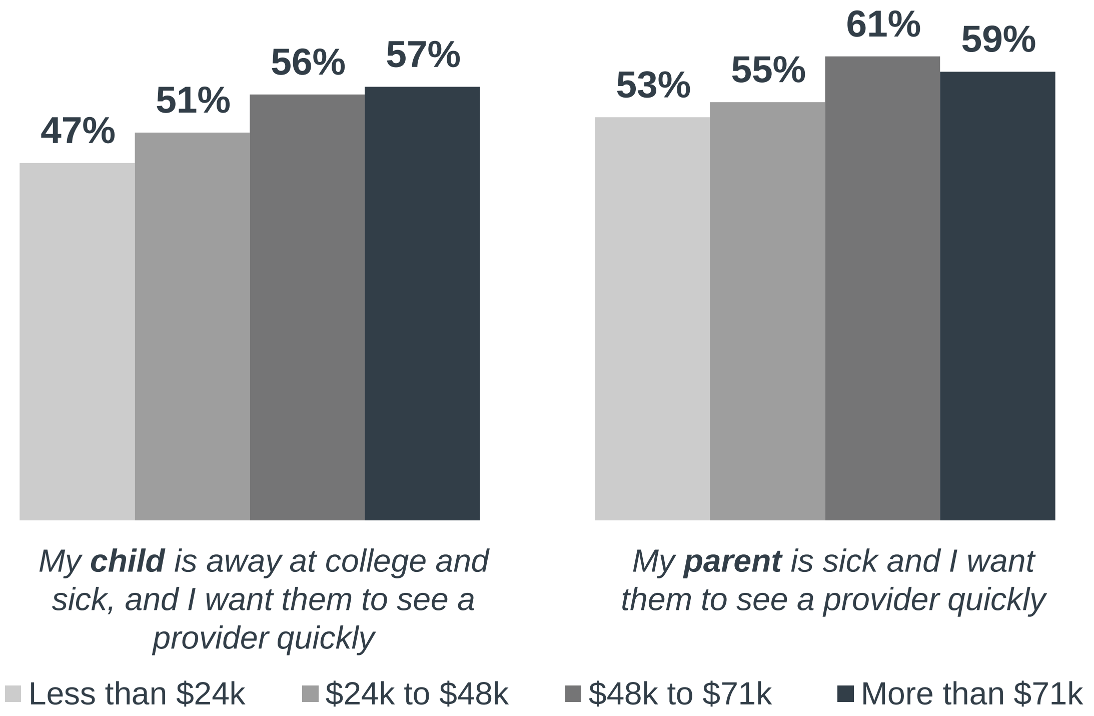
Higher earners more open to virtual care for family members

Consumers who would consider virtual care for their child or parent[1]

National



By income, 2020



1. 2020 survey n=7,452; 2017 survey n=4,879.

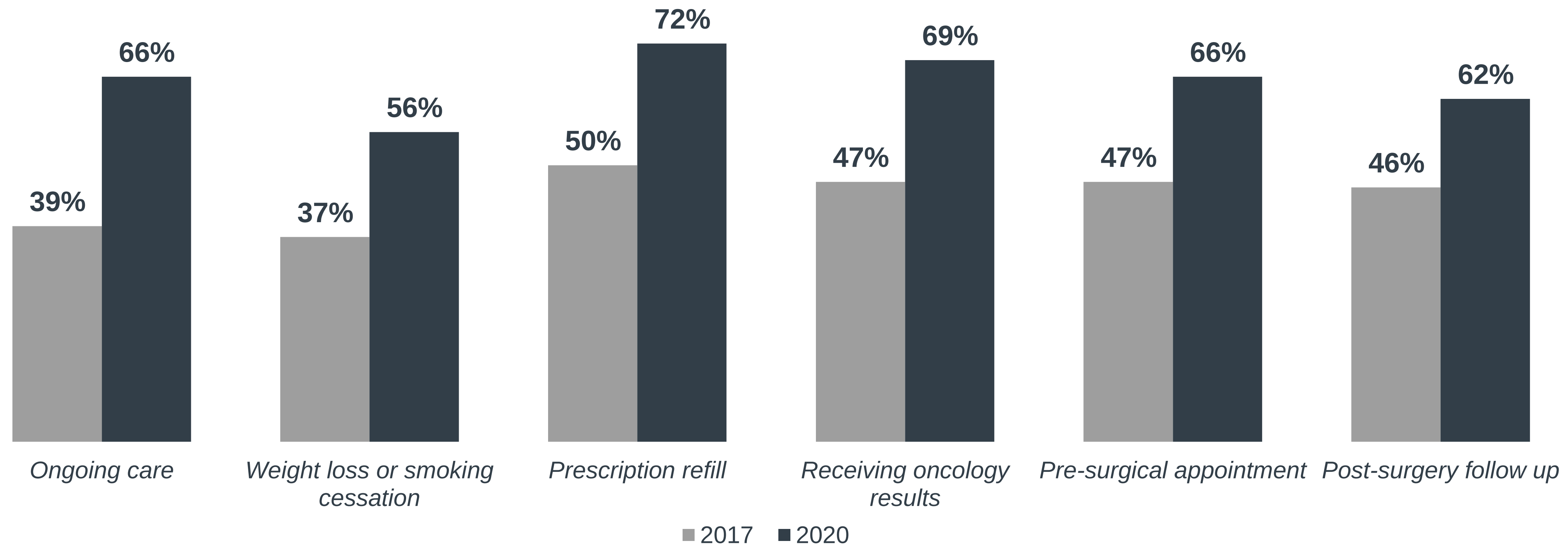
Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Openness to virtual care holds true across clinical scenarios

In just three years, appetite for virtual has increased substantially

Consumers who would consider virtual care in different scenarios

n=7,452



1. 2020 survey n=7,452; 2017 survey n=4,879.

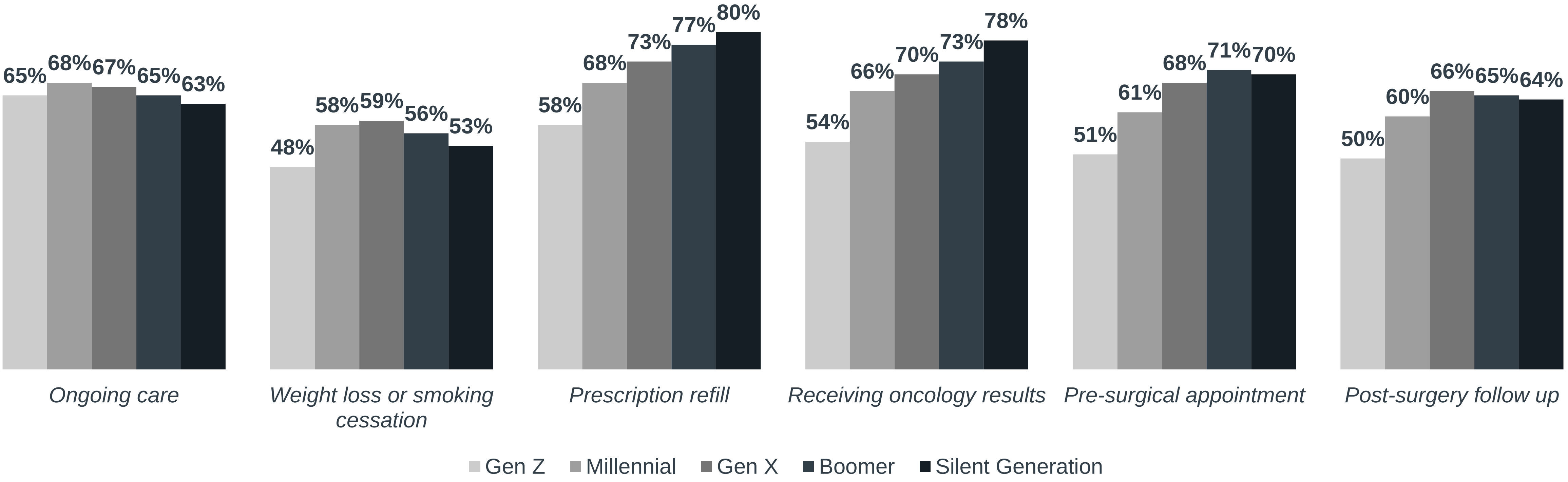
Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Older cohorts want virtual Rx, oncology, and pre-surgical care

Youngest consumers generally the least open to virtual in these scenarios

Percentage of each generational segment who would consider virtual care in different scenarios

n=7,452



Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Most women now open to virtual pregnancy care

Those who know someone impacted by Covid-19 are most open to virtual

DATA SPOTLIGHT

70%

Of women who know someone impacted by Covid-19 would be open to virtual pregnancy check-ups

58%

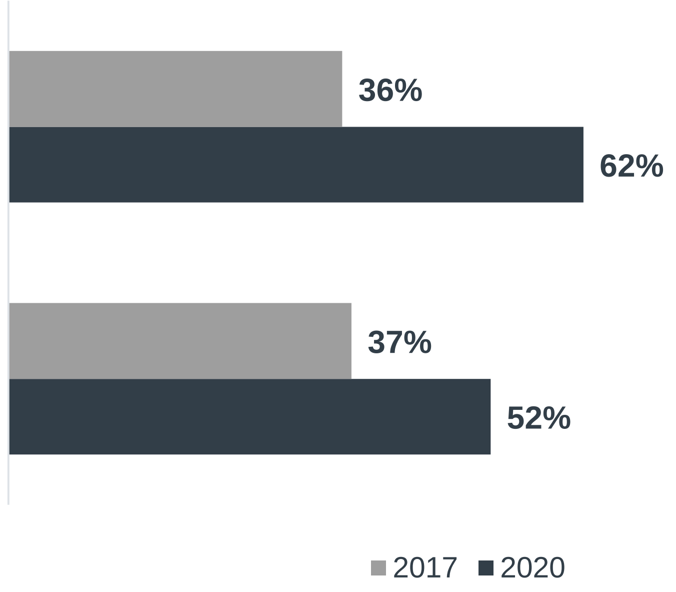
Of women who know someone impacted by Covid-19 would be open to virtual consults for a high-risk pregnancy

Percentage of women who would consider using virtual pregnancy care

n=4,424

***I am pregnant.** My OB/GYN can see me virtually for a few check-ups when physical tests are unnecessary.*

***My pregnancy is high-risk and requires close monitoring**. During some of my regular OB/GYN appointments, a Maternal-Fetal Medicine specialist will consult virtually with my OB/GYN and me to discuss my ultrasound results.*



1. 2020 survey n=4,424 women; 2017 survey n=2,466 women

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

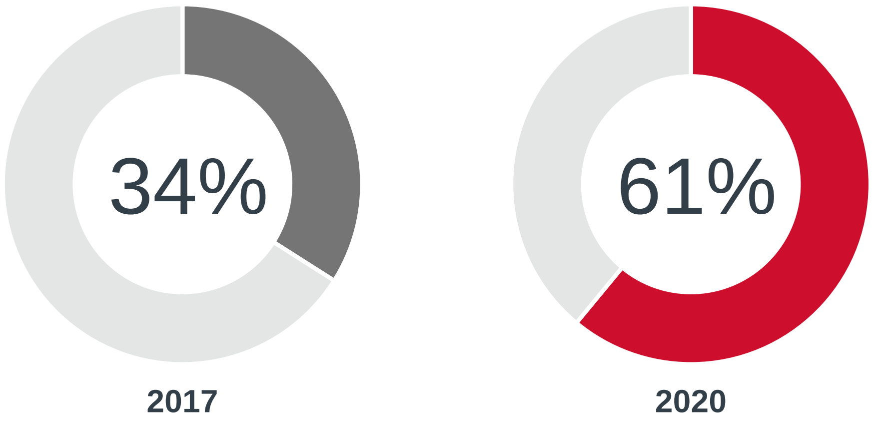
Steady increase in willingness to see a virtual dermatologist

Broad appeal for low-acuity tele-dermatology across age groups

Consumers who would consider a virtual visit with their regular dermatologist

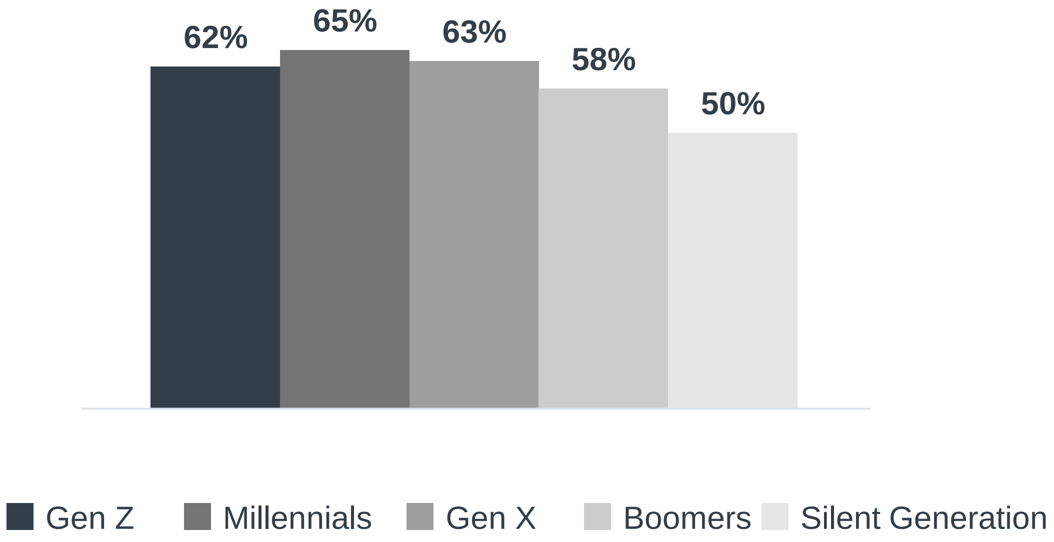
n=7,452

All adults



*"I want to treat a rash or acne. I can send my **regular dermatologist** a photo or video and receive a prescription virtually instead of going into their office."*

By generation



1. 2020 survey n=7,452; 2017 survey n=4,879

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

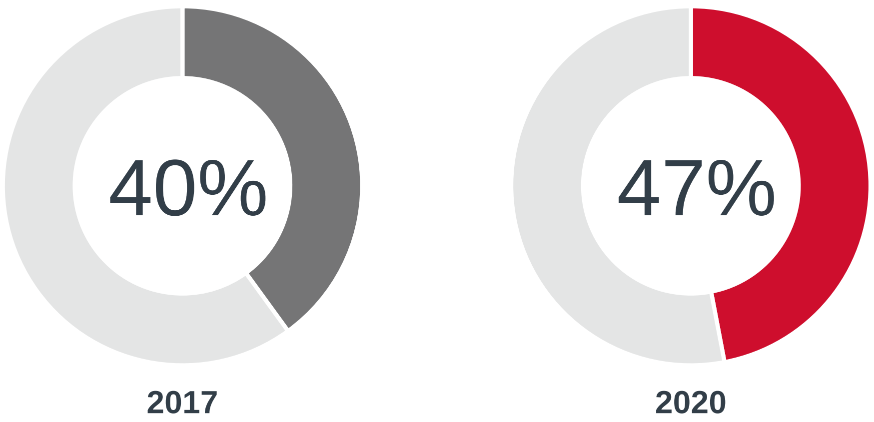
Provider familiarity is top-of-mind for all—especially Gen Zers

Youngest and oldest consumers place the highest value on who they’ll see virtually

Consumers who would consider a virtual visit with a dermatologist they have not seen before

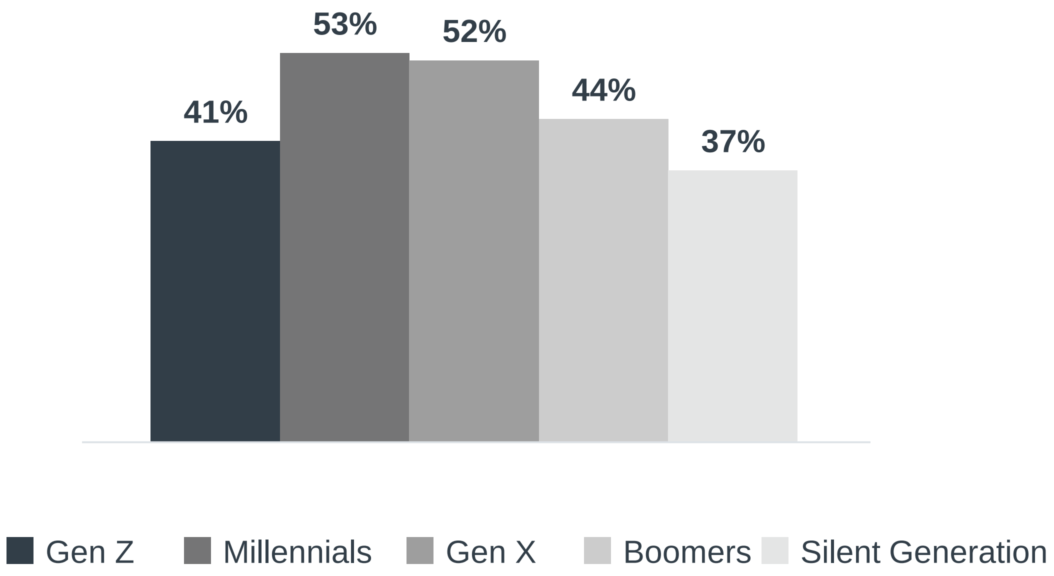
n=7,452

All adults



*“I want to treat a rash or acne. I can send **a dermatologist I have not seen before** a photo or video and receive a prescription virtually instead of going into their office.”*

By generation



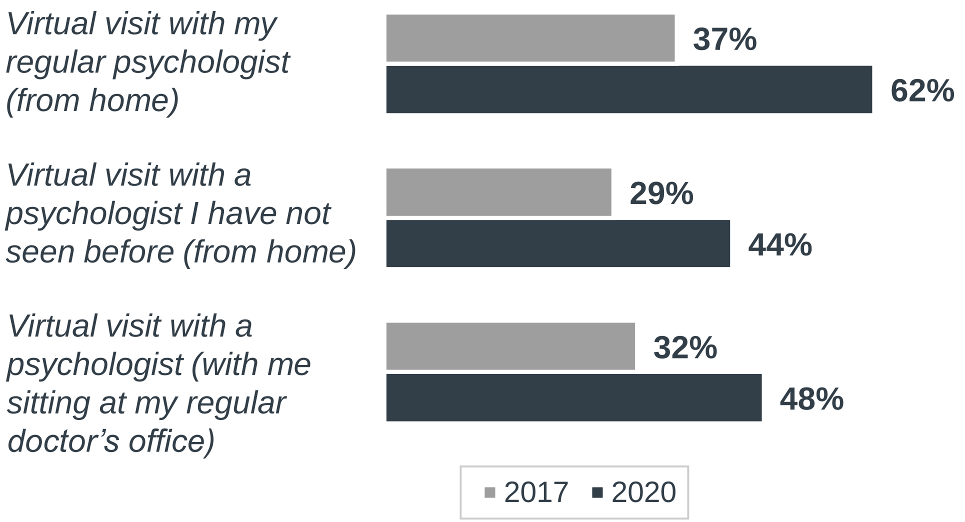
1. 2020 survey n=7,452; 2017 survey n=4,879

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Virtual behavioral health also becoming more attractive

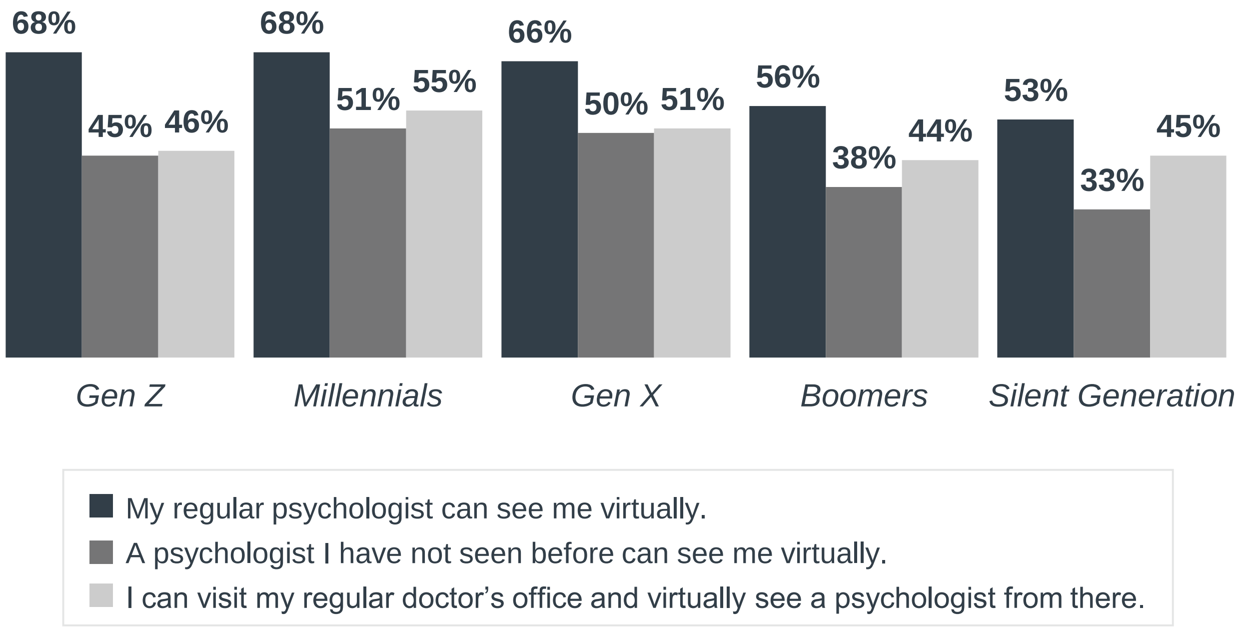
Seeing a familiar provider increases willingness to take mental health care online

Consumers who would consider a virtual visit to discuss their mental health[1]



Generational behavioral health preferences

n=7,452



1. 2020 survey n=7,452; 2017 survey n=4,879.

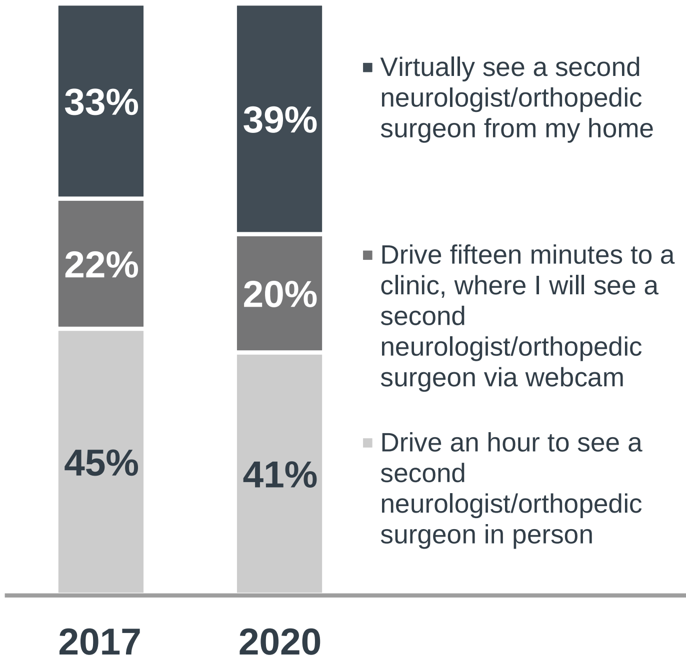
Source: Advisory Board Covid-19 Consumer Survey, June 2020.

For second opinions, many prefer virtual to driving

Openness persists even in potentially serious or complex medical situations

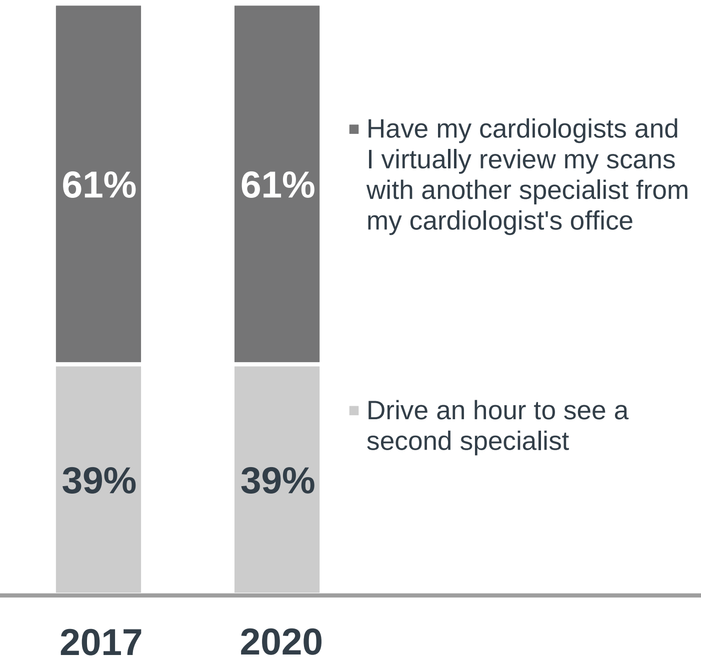
I have back pain.

I've already seen a neurologist/orthopedic surgeon, but I want a second opinion.



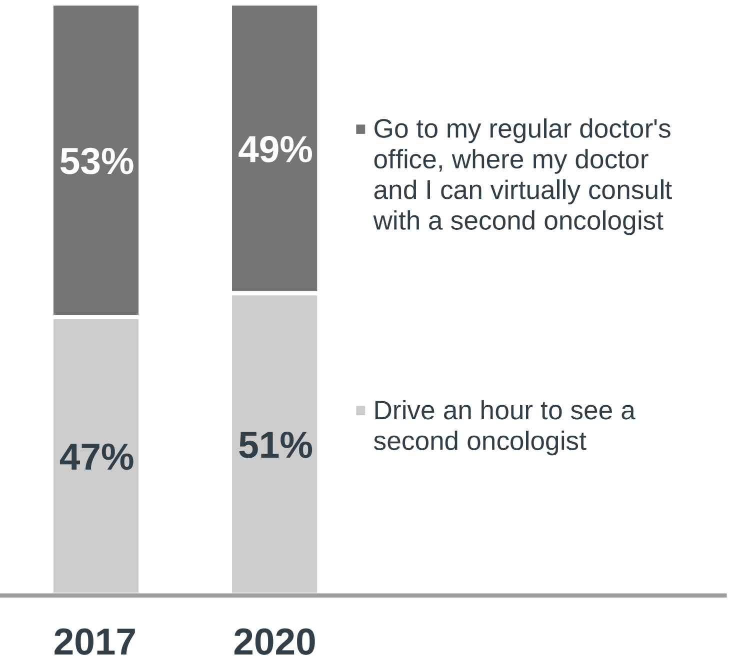
I have chest pains.

My cardiologist has performed several scans on me, and now I want a second opinion interpreting the results.



I might have a cancerous tumor.

My oncologist has run several tests and reviewed my results with me, and now I want a second opinion to review my results again and discuss different treatment options.



1. 2020 survey n=7,452; 2017 survey n=4,879

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Your next steps

Conversations you should be having

01 **What are our experiences with telehealth?** Did this data change our understanding of consumer virtual visit preferences? What additional data do we need to collect?

02 **How are we promoting telehealth services to patients?** Where and how are we advertising virtual visit options to patients? Are we offering tools or cheat sheets for consumers to increase comfort with virtual visits? What features can we emphasize for certain segments to make the service more attractive (e.g., see your usual provider, wait less than a day to be seen)?

03 **How are we supporting frontline clinicians?** Do we understand clinician pain points or concerns about virtual care? What type of training do we offer for first-timers and clinicians who don’t use virtual visits frequently? Do we have a forum for best practice sharing?

04 **What investments or workflow changes do we need to make for the long-term?** How well does our technology work? How well does it integrate into our current workflows and what we envision future workflows will look like?

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

Related resources

READY-TO-USE SLIDES
How Covid-19 is transforming telehealth—now and in the future
Read now

EXPERT INSIGHT
How Covid-19 will impact telehealth
Read now

RESOURCE
Covid-19 service line impact guide
Read now

CONSUMER SURVEY
What do consumers want from virtual visits?
Read now

RESOURCE
Creating a consumer-focused digital strategy
Read now

RESOURCE
Strategic marketing for direct-to-consumer virtual visits
Read now

RESOURCE
Virtual visits opportunity audit
Read now

RESOURCE
Telehealth framework and program structures
Read now

TEMPLATE
Telemedicine strategic planning template
Read now

Source: Advisory Board Covid-19 Consumer Survey, June 2020.

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