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Telemedicine: Changing Consumer Behavior & Expectations

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Agenda

- Will consumers embrace telemedicine?
- How is telemedicine evolving in optometry?
- Who's most interested & why?
- Should ECPs consider telemedicine?

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Will consumers embrace telemedicine?

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COVID-19 will permanently alter consumer behavior

- Duration will impact the intensity of shifts
- Not impacting all Americans equally
- Morphing into different factions

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New behaviors are impacting vision

- More screen time
- More free time outdoors
- Glasses over contacts
- Masks create fog issues



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And transforming the way we communicate

- Zoom went from 10M daily participants in December 2019 to 300M in April 2020
- Interaction is going beyond the “inner circle”
- All age groups, not just digital natives

30X

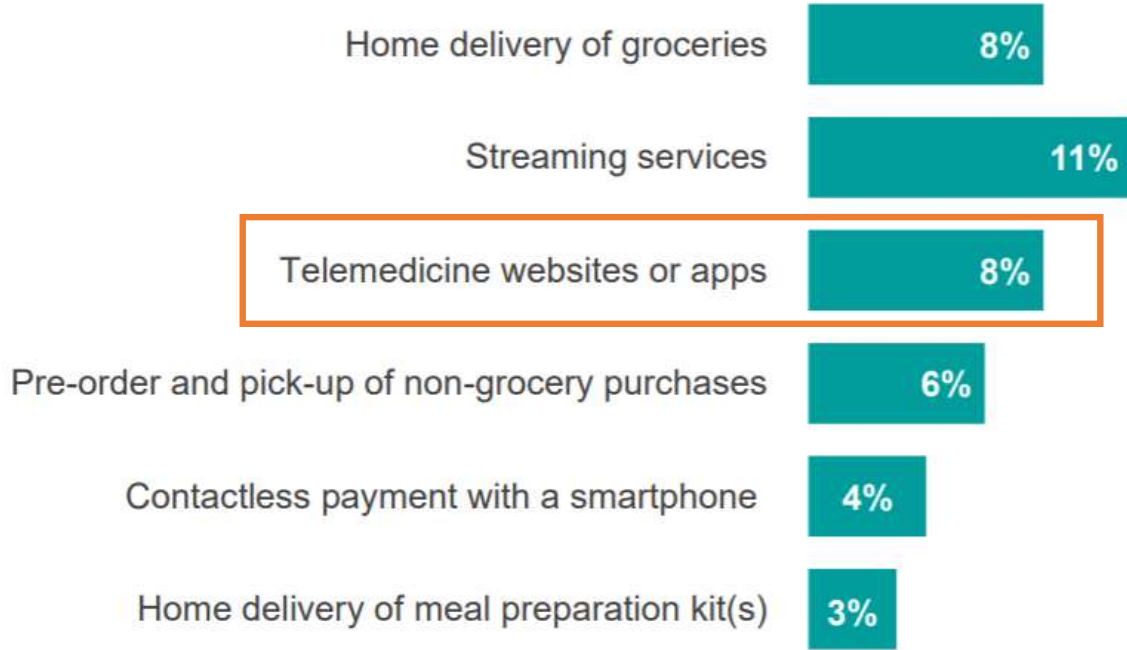
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It's sparked unprecedented levels of trial

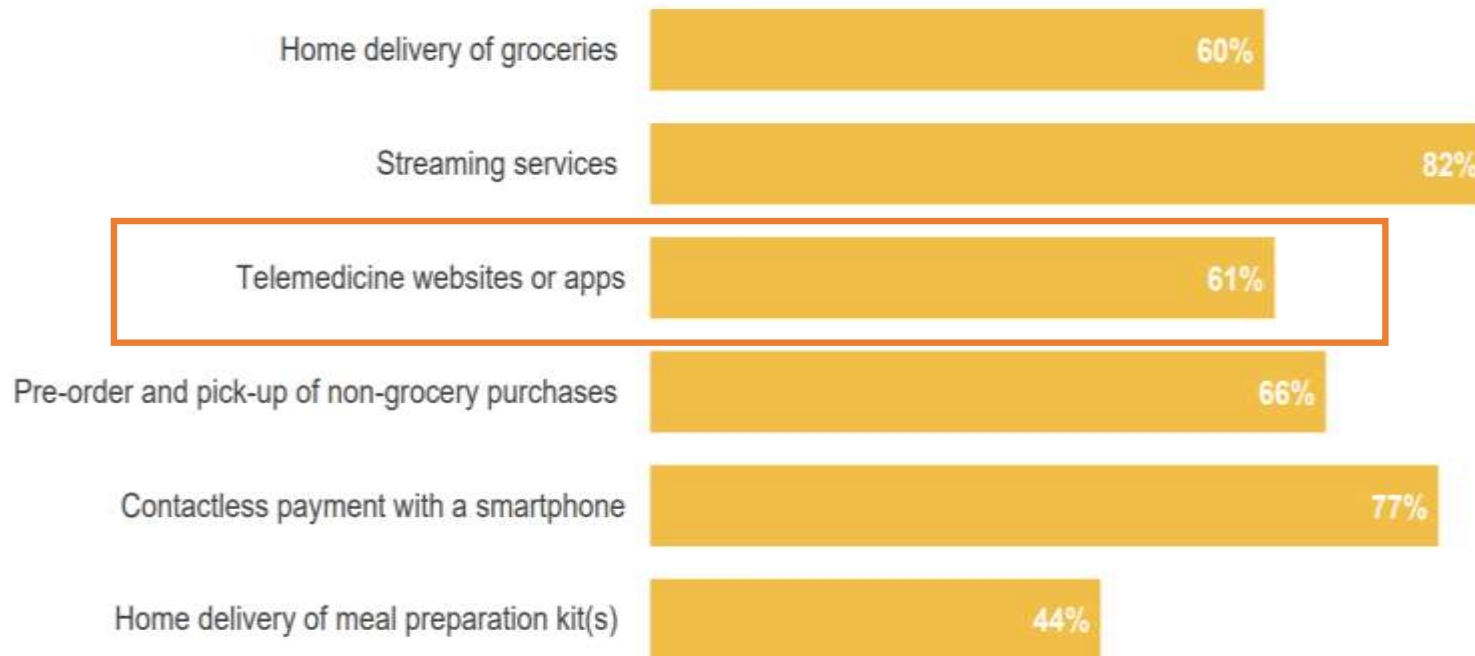
Since the COVID-19 crisis began, have you used a brand, product, service or feature that you had never used before in the following areas?



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Telemedicine is likely to benefit beyond the crisis

Select the categories where you expect to continue using the new brands, products, services or features you have tried ?



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The telehealth market is expected to grow 80% YOY

- Expansion of reimbursement for telehealth services
- Increasing demand due to the COVID-19 crisis
- Increasing number of mobile health applications fueling adoption

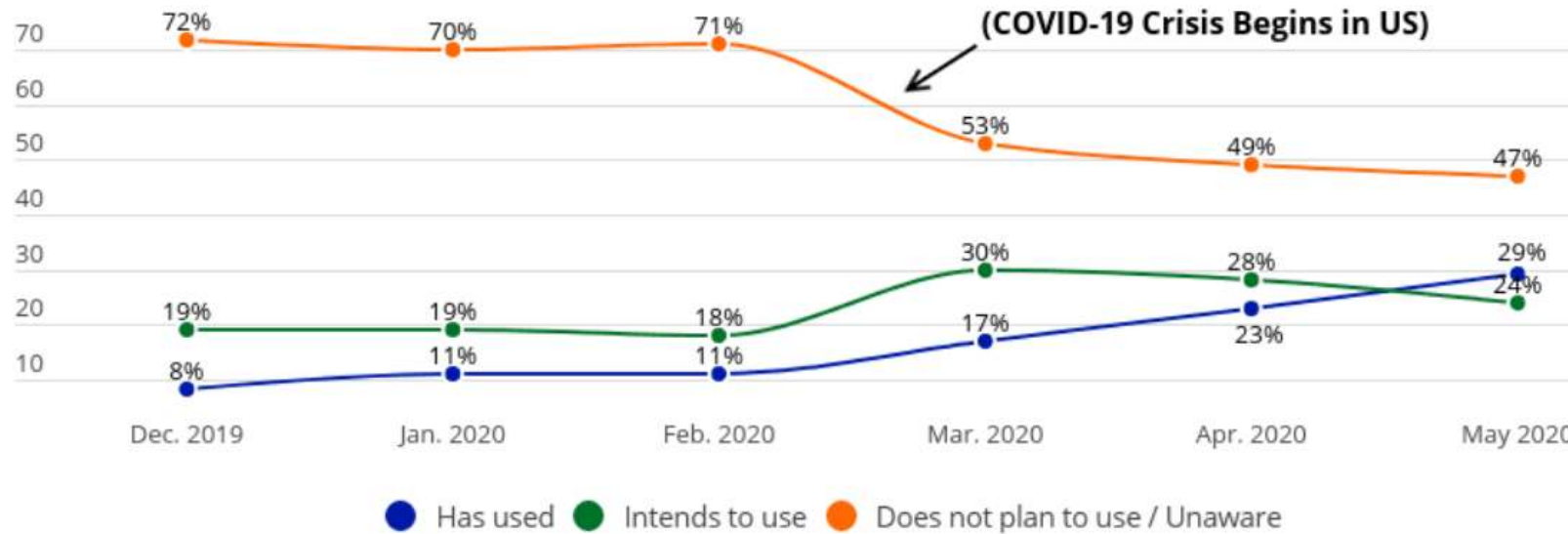


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Telemedicine usage has steadily increased since the crisis began

Telemedicine adoption (Dec. 2019 to May 2020)



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Consumer satisfaction with telehealth is high

- Satisfaction was high before the pandemic and has held steady since
- JD Power scores are among the highest of all healthcare, insurance & financial services studies
- Over 70% who've tried it in the past 3 months reported a positive experience



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J.D. Power. (2019, October 28). "Telehealth: Best Consumer Healthcare Experience You've Never Tried, Says J.D. Power Study" *J.D. Power Website*. Retrieved from: <https://www.jdpower.com>

CivicScience. (2020, May). "Nearly 3 in 10 U.S. Adults Have Now Tried Telemedicine – But Gen Z Lags Behind" *CivicScience company blog*. Retrieved from: <https://civicscience.com>



Providers are getting more comfortable



In addition, **57%**

of providers view telehealth more favorably than they did before COVID-19 and

64%

are more comfortable using it.⁵

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Recent headlines say it all...

Telemedicine Boom Triggered by COVID-19 Will Drastically Alter the Future of Health Care

5 Reasons Why Telehealth Is Here To Stay (COVID-19 And Beyond)

Telehealth booms amid COVID-19 crisis; virtual care is here to stay

Telemedicine Is Here to Stay

Some industry experts say that the rapid shift toward telemedicine in response to COVID-19 safety recommendations will stick long after the pandemic is over.

Embrace telehealth, it's here to stay

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How is telemedicine evolving in optometry?

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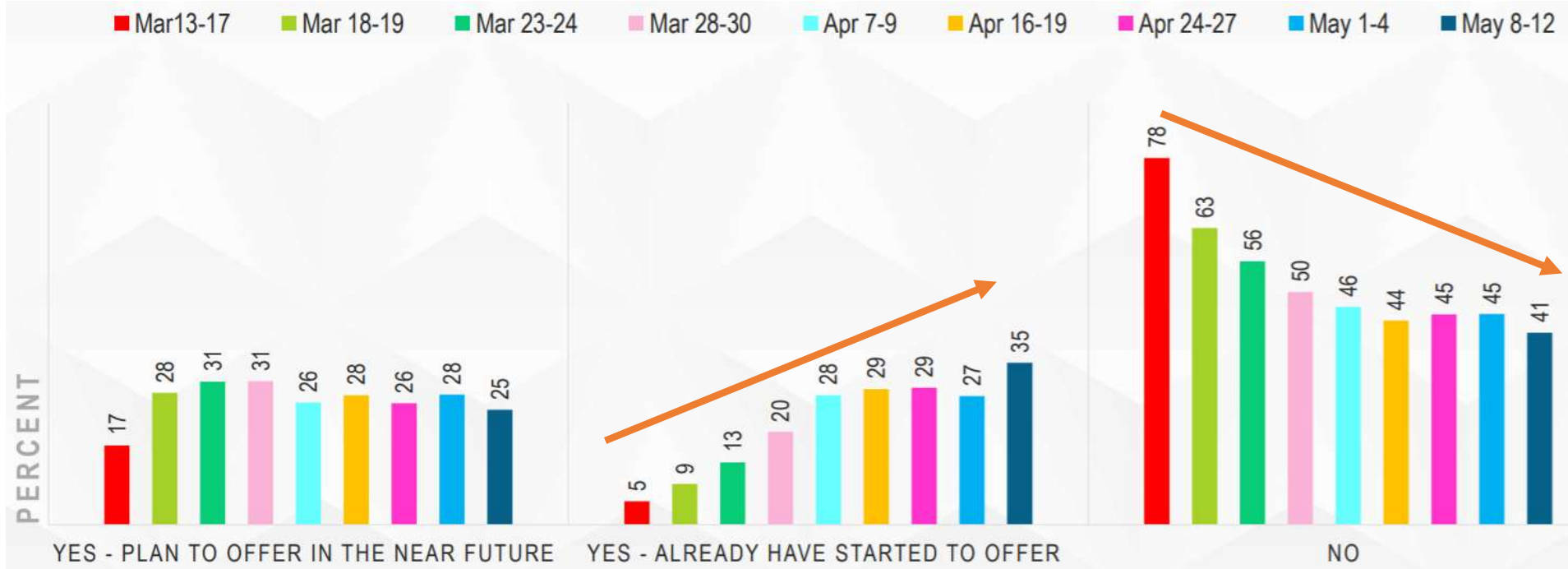
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Drastic shift in ECP sentiment since March

Has the coronavirus influenced your consideration of offering telehealth services/options?



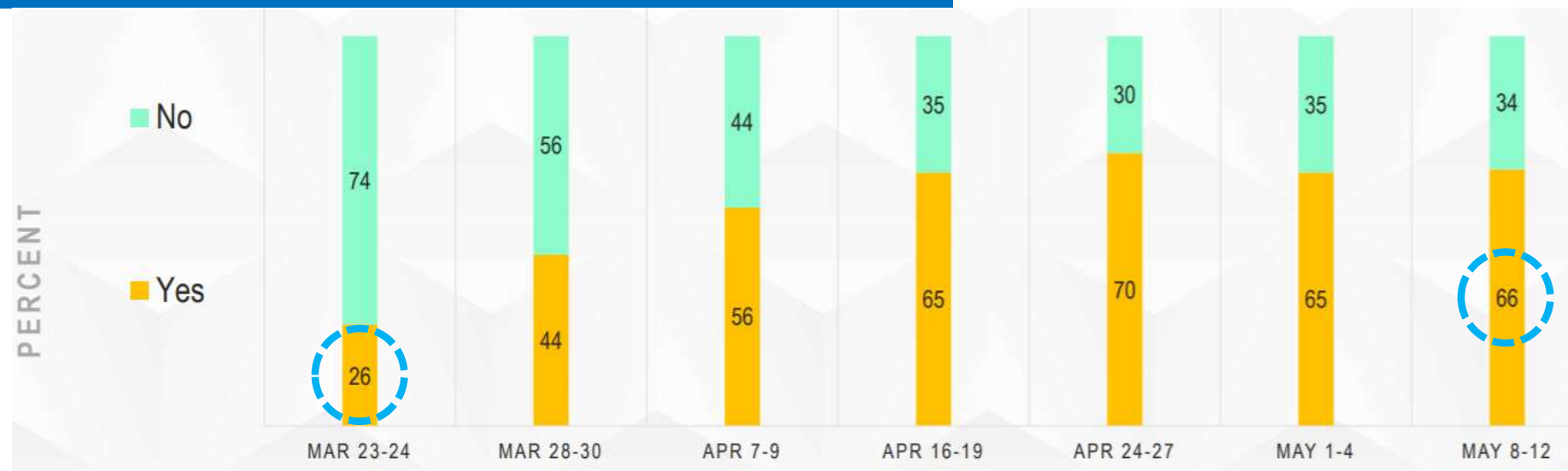
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ECP billing for telehealth services has increased

[IF OFFERING TELEHEALTH]
Have you billed for telehealth services in the last two

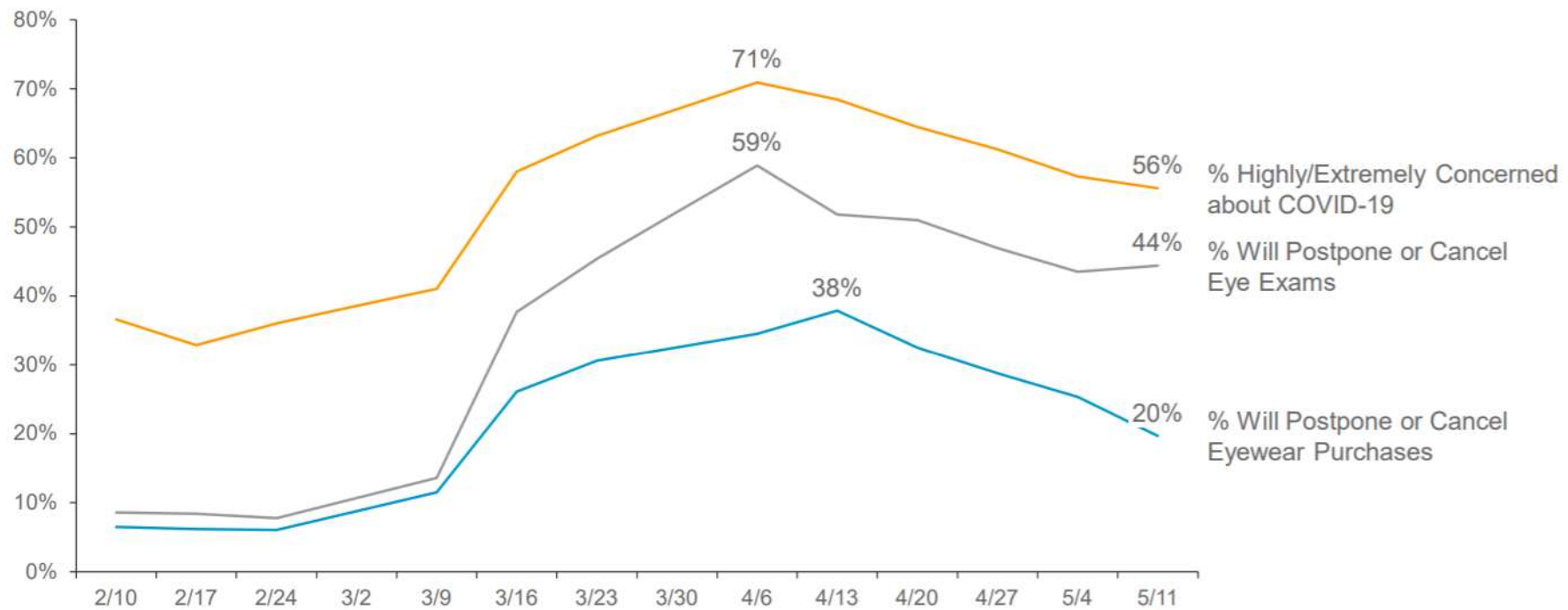


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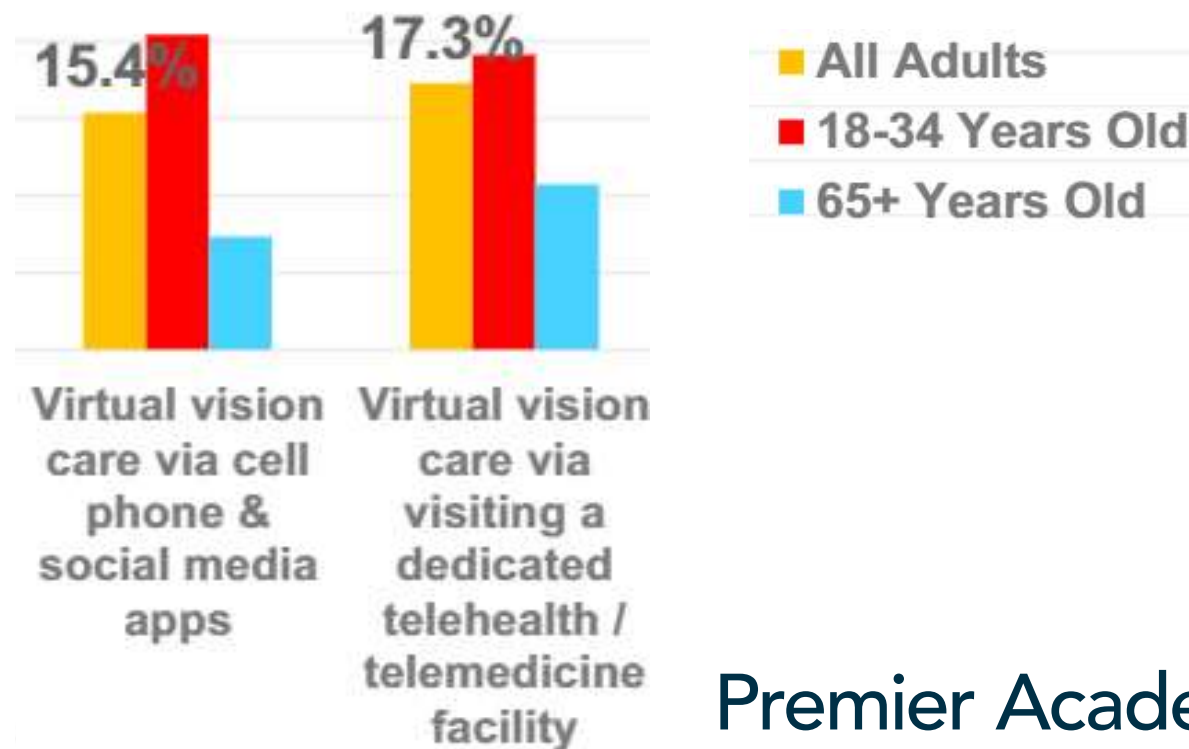
But 44% of consumers will delay/cancel eye exams



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Consumers are intrigued by telemedicine, but not all are ready for it



Please indicate which of the services below you would like to see your eye doctor offer AFTER the COVID-19 crisis is over.



Many can't envision what telemedicine looks like for optometry

"I can't imagine how you would have telehealth care for getting your eyes examined."

"While I'm intrigued by the idea of telehealth, I would want to understand potential limitations to the service."

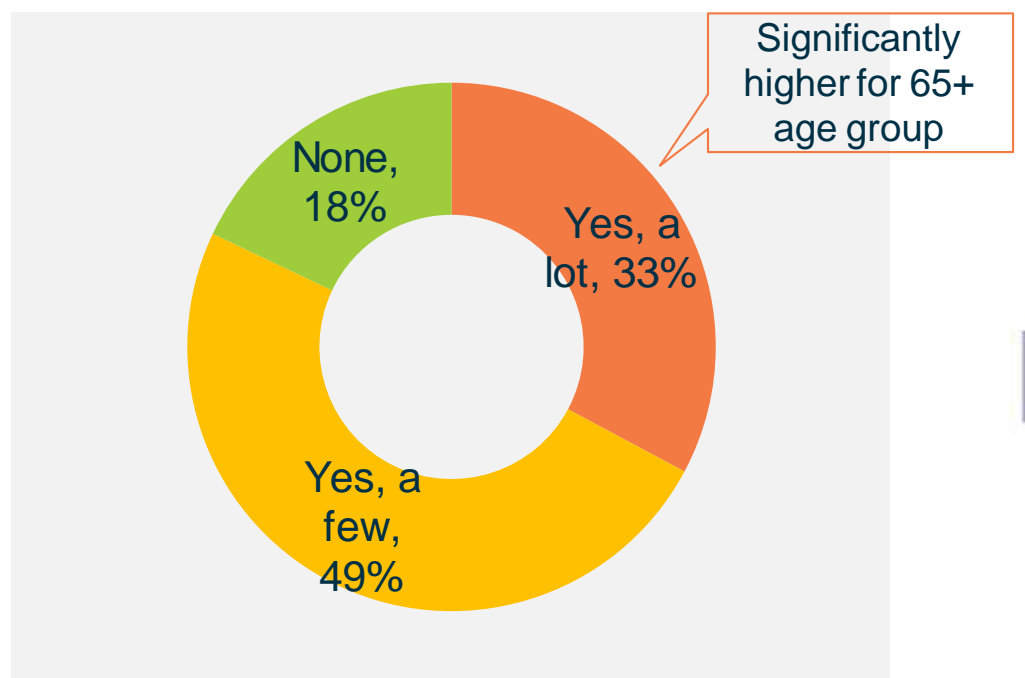
"Examples of these services would be great."

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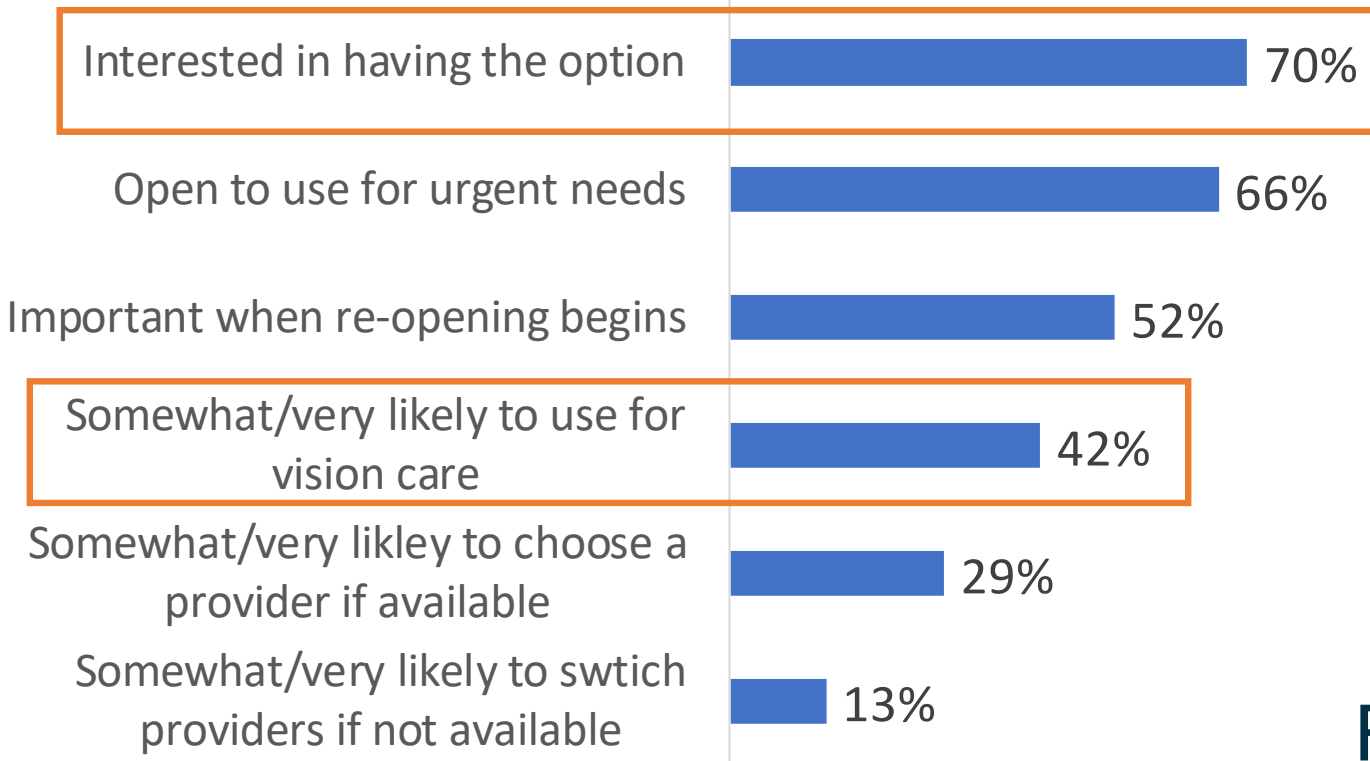
Ambiguity leads to concerns



- Q. Overall, what is the biggest value you see in utilizing any form of telehealth with your eye care professional?
- Q. Do you have any concerns about using telehealth for your current eyecare and eye health needs?

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Regardless of likelihood to use, consumers want the option



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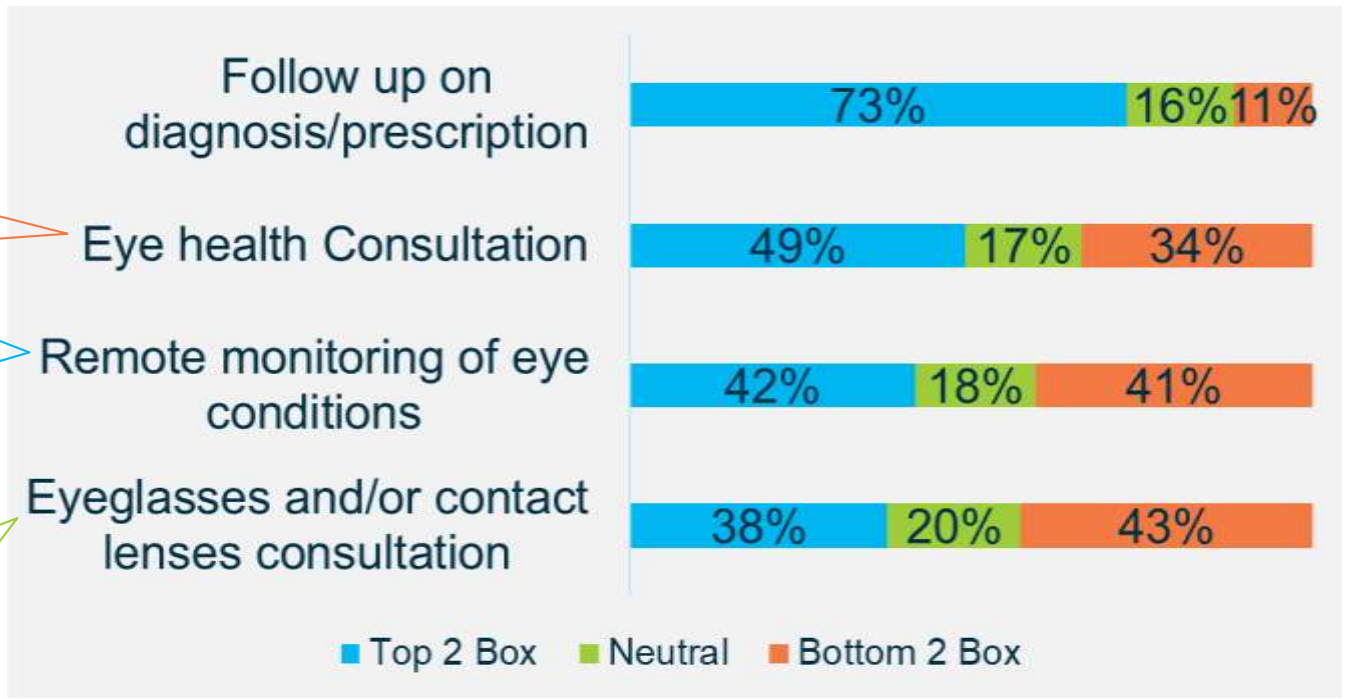
Likelihood to use depends on the service and doctor recommendation

Which of the following types of functions are you comfortable completing virtually?

More likely among 45-54 year-olds

Females are more conformable than Males

More likely among 35-64 year-olds than 65+





Who's most interested and why?

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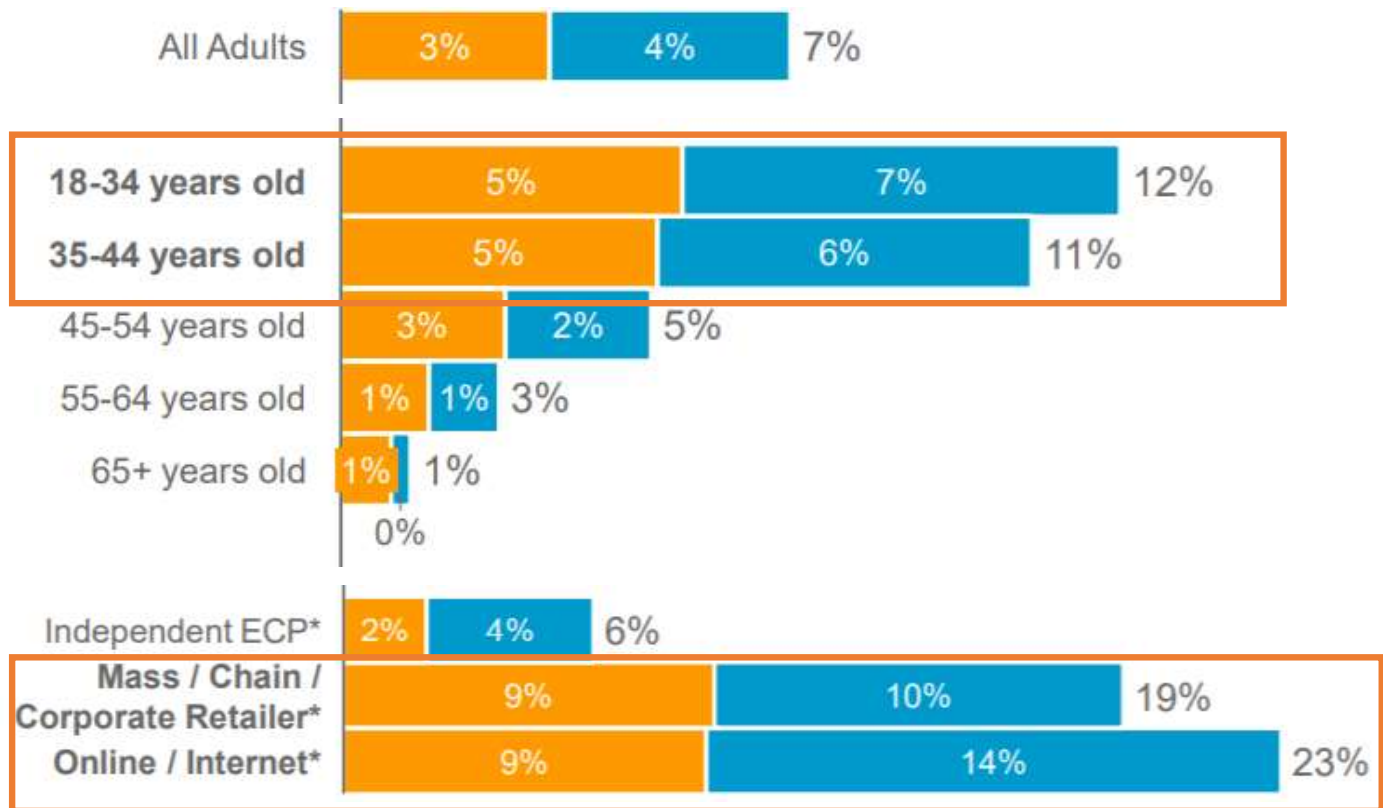


Younger consumers and previous chain & online eyewear buyers are more open to telehealth

Will you postpone or cancel any eye exams or trips to the eye doctor while COVID-19 is still a threat?

"I will get a...."

- ...complete telemedicine eye exam at remote location"
- ...virtual eye screening or visual acuity test via pc/mobile app"



The Vision Council. (2020, May 21). "Researching Recovery: Exploring Evolving Consumer Behavior and Industry Response During COVID-19" *The Vision Council Webinar*. Retrieved from: <https://www.thevisioncouncil.org/>

Access to MVC and life stage also impact behavior

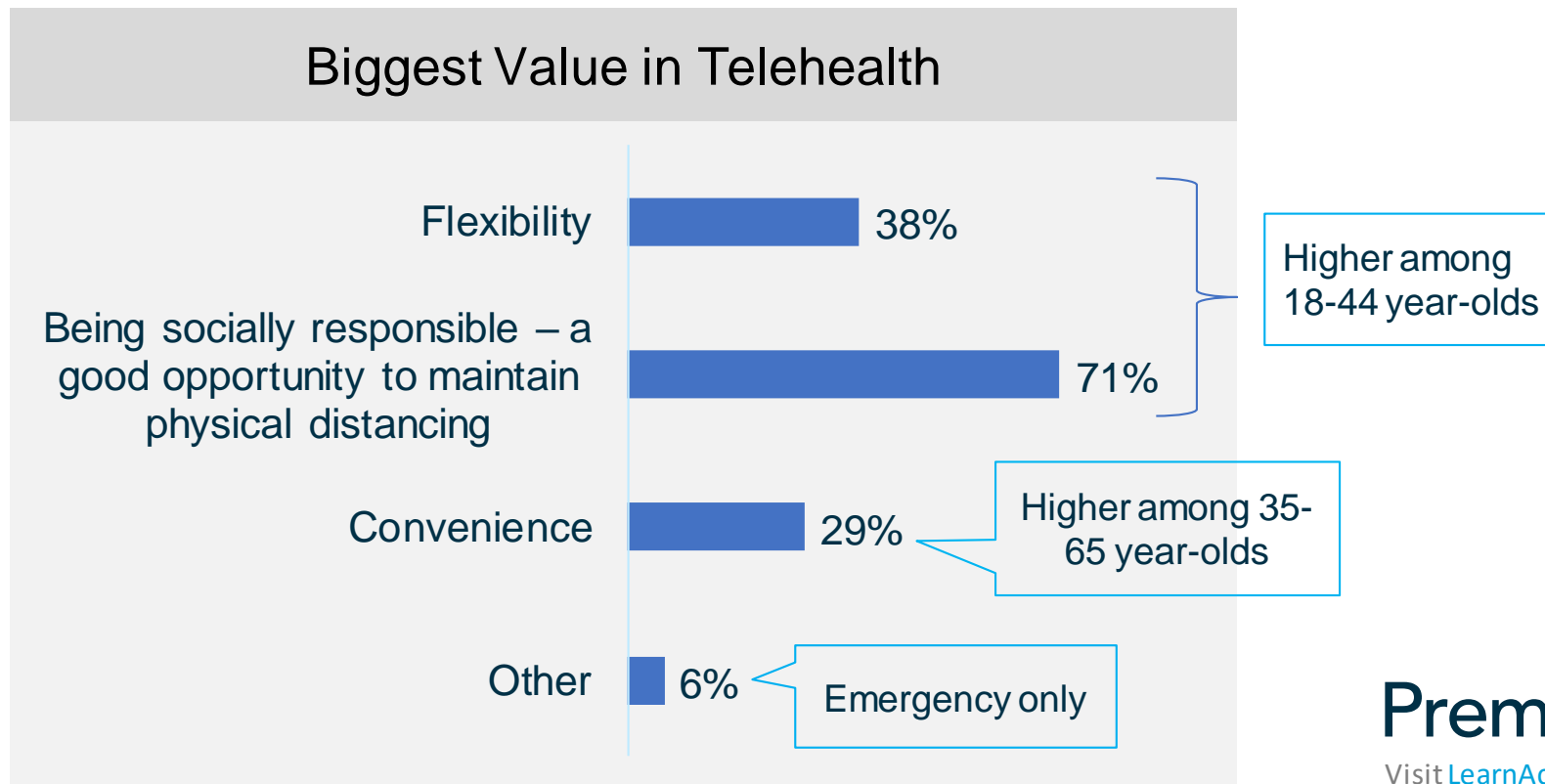
- Younger Millennials
 - Most interested in telehealth
 - May have lost benefits during this time
 - More likely to extend time between visits
- Parents
 - Most likely for eyecare to be top of mind
 - logistics are complicated at this time
- Retirees
 - Least interested in telehealth



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Social responsibility tops the list of telemedicine value propositions for VSP members...for now



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Should ECPs consider telemedicine?

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What is your primary goal?

- Expand the accessibility of your services
- Increase efficiencies
- Expand on existing patient relationships
- Reduce the cost of service delivery
- Attract a new demographic

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Who is your target?

- Consider patient demographics (age, income, access to MVC, etc.)
- What are the unique needs of your patients? What do they find valuable? What keeps them coming back?
- Are there unserved patients in your community that would benefit?
- Will telemedicine services help differentiate your practice?



Are you able to support telemedicine effectively?

- Do you have a well-defined workflow to support virtual visits?
- How will you support patients through the experience?
- Do you have electronic options for forms, bill pay, etc.?
- Do you have a solution that integrates with common tech platforms like Zoom and Google Calendar to increase ease of use and adoption?

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How will you market to patients?

- Reduce virus exposure/Social responsibility (remember this is polarizing so be sure you know your audience)
- Convenience/Flexibility
- Continuity of care
- Enhanced patient outcomes
- Shorter patient wait times

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Don't forget the importance of patient education

- Give extra guidance
 - What does it look like? (what it is and what it's not)
 - Provide how-tos for setting up and participating in the appointment
 - Reassure them you will be able to get all of the information to make an accurate diagnosis
- Focus on the patient experience
 - Positive word of mouth is key to increasing adoption
 - 65% of telehealth users used the service because they received a positive recommendation from others

Where to Get Care When You Need it





Recap

- Telemedicine is here to stay
- Patient satisfaction is typically high if well executed
- Consumers are intrigued, but need more details
- While it's not for everyone, consumers want the option
- Adjust messaging to your target audience
- Patient education will help promote adoption

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