BACKGROUND:

❑ Survey of ~800 US Consumers balanced to census to ask about virtual doctor's appointments.

FINDINGS:

❑ Covid caused a surge in telehealth usage, especially among older respondents (55+). A considerable percentage of the virtual gains during covid figure to hold post-covid.

❑ The vast majority of those who have done virtual appointments say they did so for the first time in the past six months (90% of respondents who have done virtual appointments).

❑ Just over half of respondents say they have been delaying doctor's visits because of the pandemic.

❑ Consumer sentiment toward virtual doctor's visits is very positive overall. Respondents who have done virtual appointments view the cost as the same, virtual as better for convenience, and in-person as better for quality of care / outcome of visit.

❑ Most respondents say they would be more likely to ask a doctor which app/platform they can use to have a virtual visit with them (~80%) as opposed to finding a tele-health platform they like and finding a doctor up there for their issue.
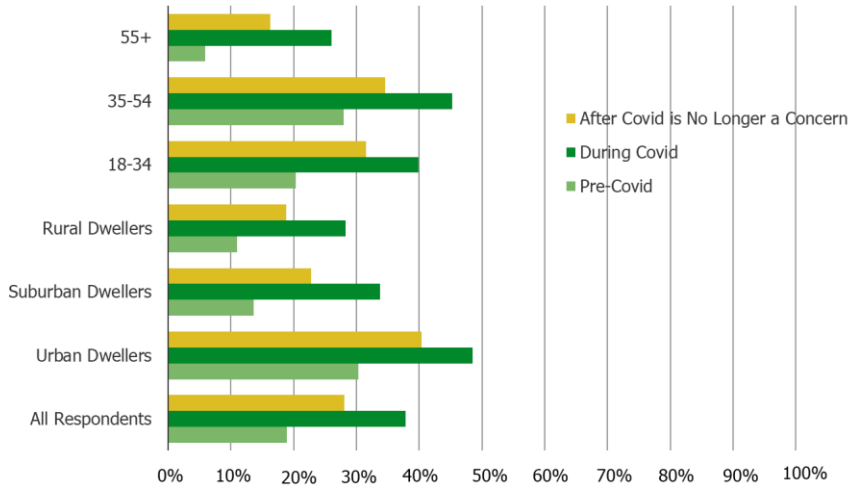
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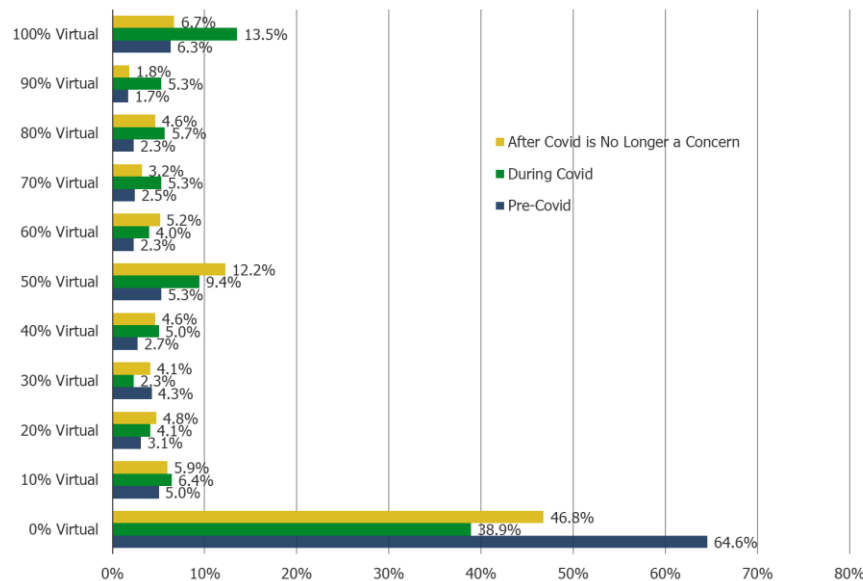
Telehealth/Healthcare

What percentage of your doctor's visits have been / will be virtual during the following time periods?

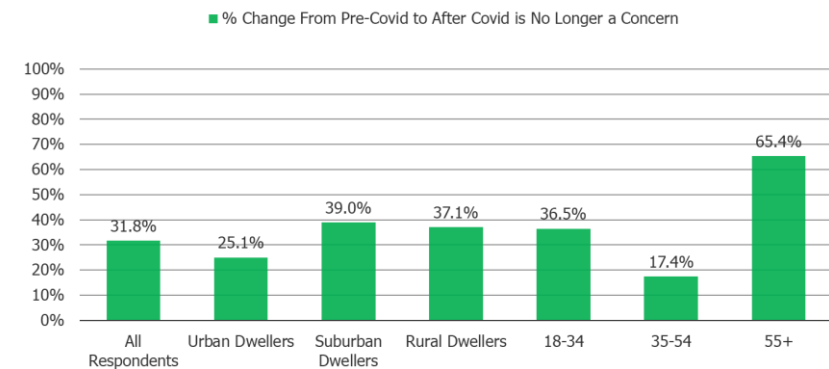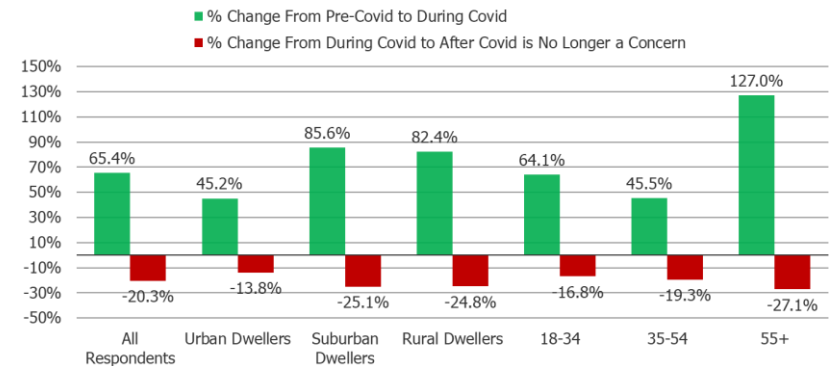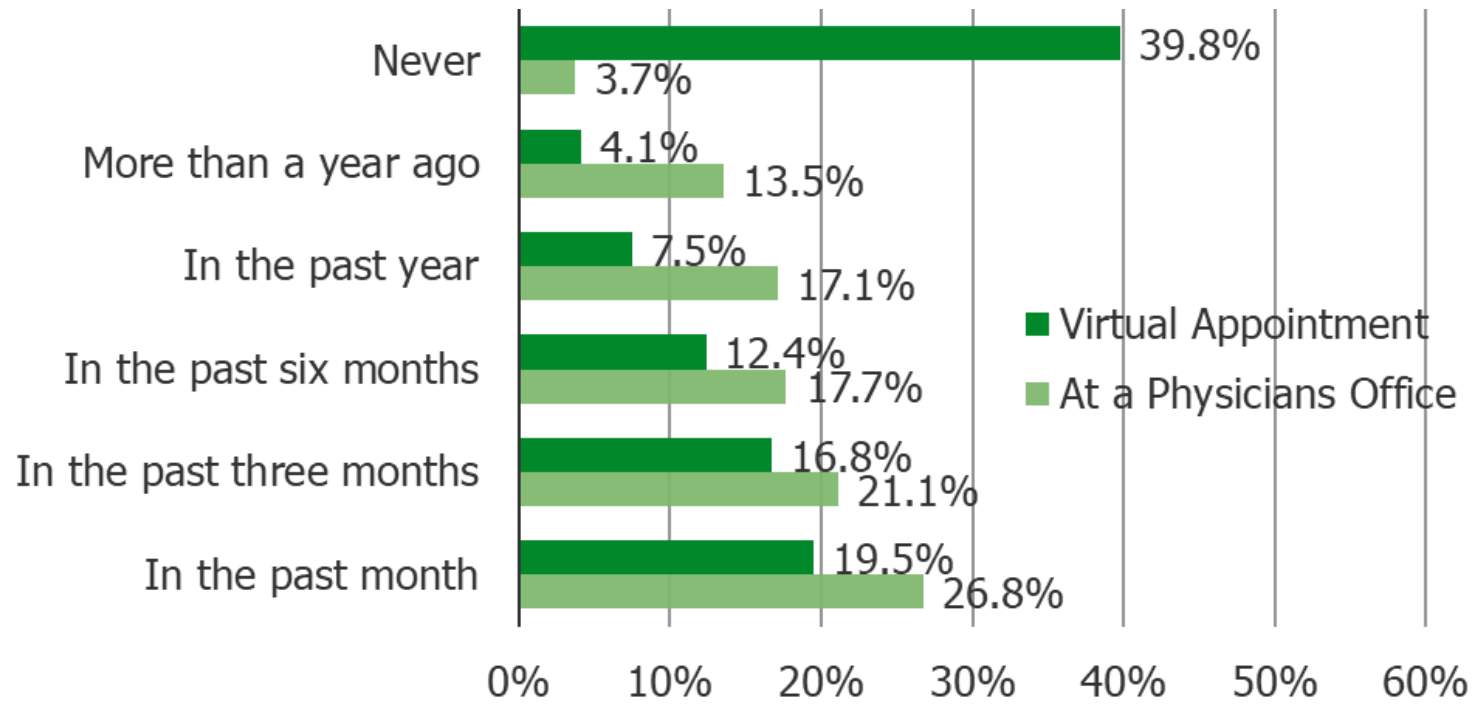*Posed to all respondents.*

Weighted Average

Legend:
- After Covid is No Longer a Concern (yellow)
- During Covid (dark green)
- Pre-Covid (light green)

Categories: 55+, 35-54, 18-34, Rural Dwellers, Suburban Dwellers, Urban Dwellers, All Respondents

Response Distributions

Legend:
- After Covid is No Longer a Concern (yellow)
- During Covid (green)
- Pre-Covid (blue)

Category	After Covid	During Covid	Pre-Covid
100% Virtual	6.7%	13.5%	6.3%
90% Virtual	1.8%	5.3%	1.7%
80% Virtual	4.6%	5.7%	2.3%
70% Virtual	3.2%	5.3%	2.5%
60% Virtual	5.2%	4.0%	2.3%
50% Virtual	12.2%	9.4%	5.3%
40% Virtual	4.6%	5.0%	2.7%
30% Virtual	4.1%	2.3%	4.3%
20% Virtual	4.8%	4.1%	3.1%
10% Virtual	5.9%	6.4%	5.0%
0% Virtual	46.8%	38.9%	64.6%

N = 776

% Change Across Time Periods

Legend:
- % Change From Pre-Covid to During Covid (green)
- % Change From During Covid to After Covid is No Longer a Concern (red)

Category	Pre→During	During→After
All Respondents	65.4%	-20.3%
Urban Dwellers	45.2%	-13.8%
Suburban Dwellers	85.6%	-25.1%
Rural Dwellers	82.4%	-24.8%
18-34	64.1%	-16.8%
35-54	45.5%	-19.3%
55+	127.0%	-27.1%

% Change From Pre-Covid to After Covid is No Longer a Concern (green)

Category	% Change
All Respondents	31.8%
Urban Dwellers	25.1%
Suburban Dwellers	39.0%
Rural Dwellers	37.1%
18-34	36.5%
35-54	17.4%
55+	65.4%

When is the last time you had a visit with a doctor?

Posed to all respondents.

Category	Virtual Appointment	At a Physicians Office
Never	39.8%	3.7%
More than a year ago	4.1%	13.5%
In the past year	7.5%	17.1%
In the past six months	12.4%	17.7%
In the past three months	16.8%	21.1%
In the past month	19.5%	26.8%

N = 776

Have you been delaying any types of doctor's visits because of the pandemic?

Posed to all respondents.

Yes — 52.2%

No — 47.8%
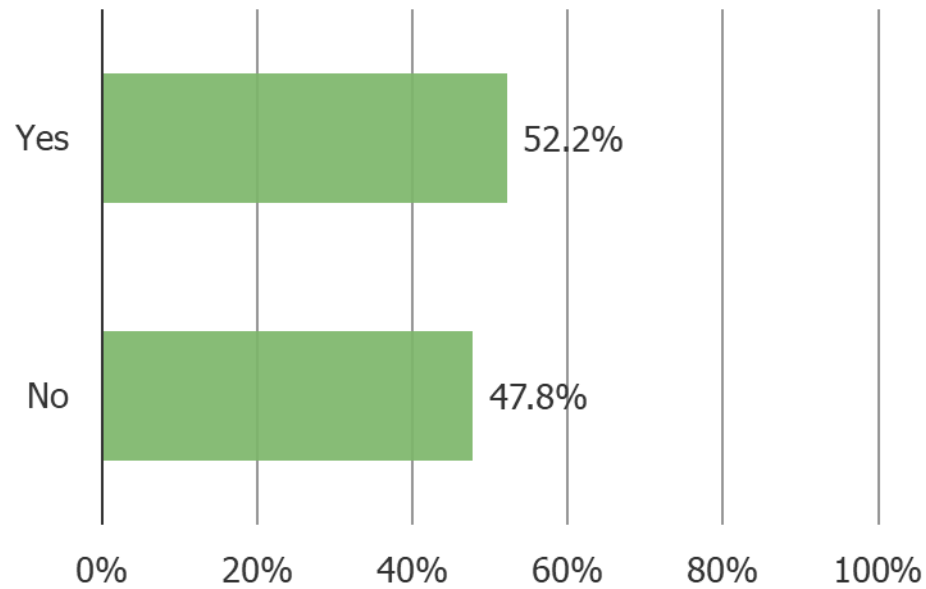
N = 776

Have you ever done a virtual doctor appointment?
Posed to all respondents.
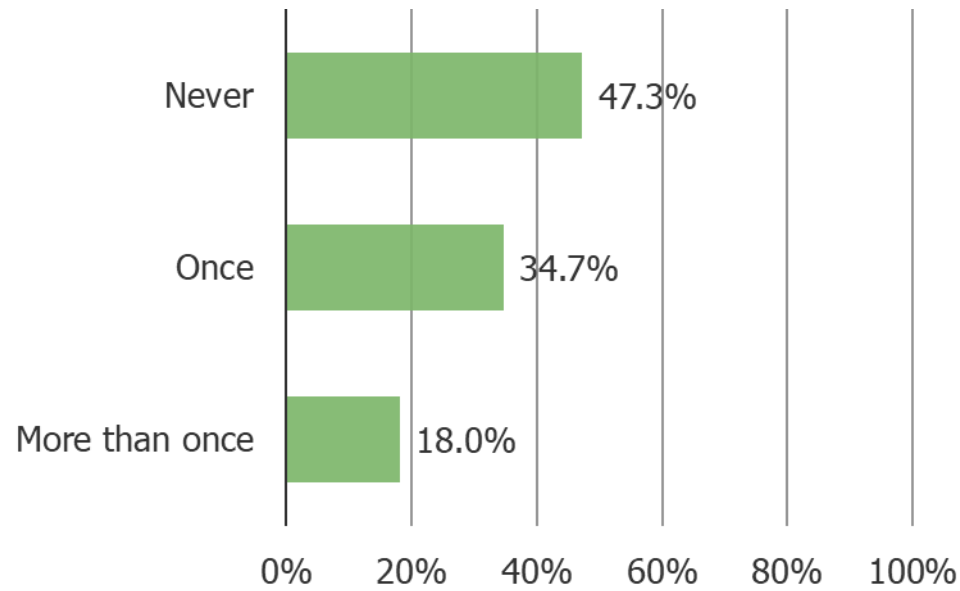
N = 776

When did you do a virtual doctor's appointment for the FIRST time?

Posed to all respondents who have done a virtual appointment.

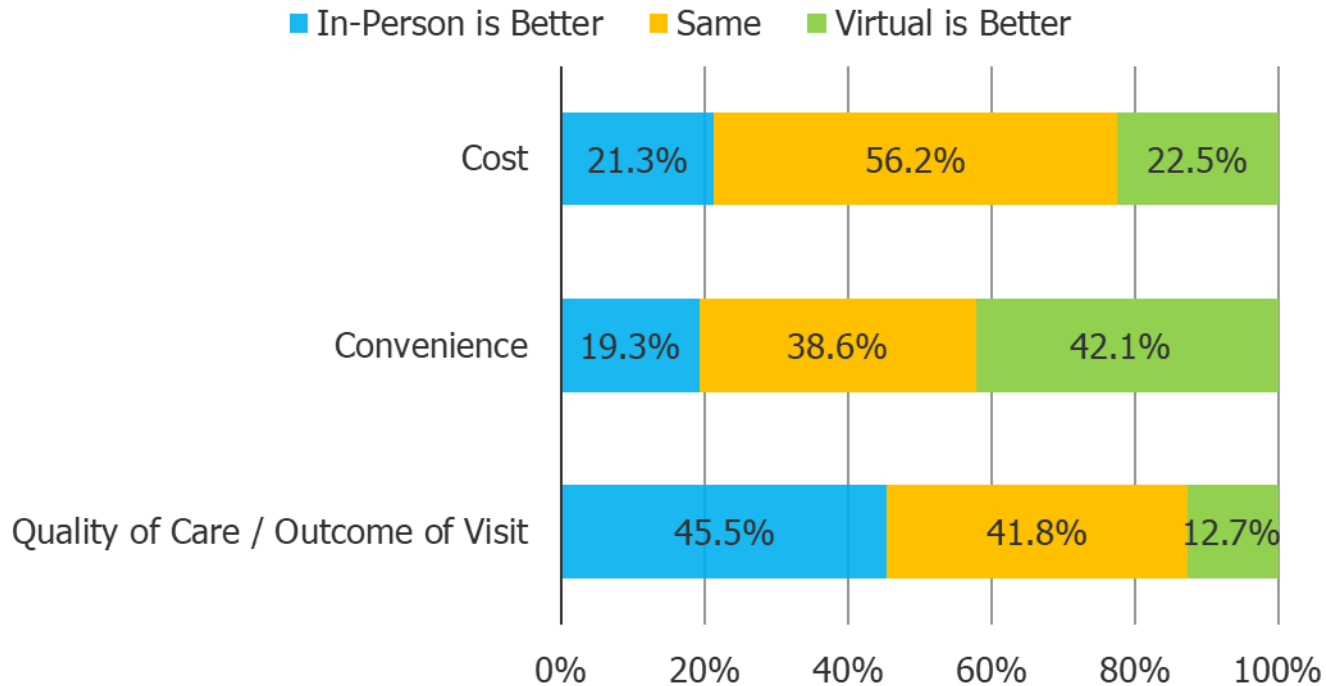| Category	Percentage
More than six months ago / I don't remember	9.3%
In the past six months	24.0%
In the past three months	36.9%
In the past month	29.8%
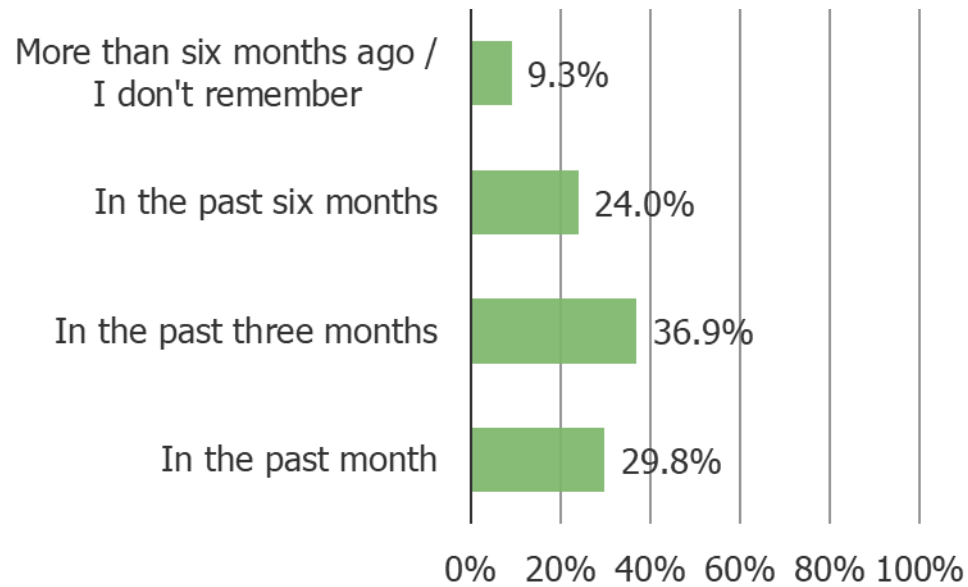
N = 409

How do you compare the quality of care/outcome of virtual visits vs. in-person doctor's visits?

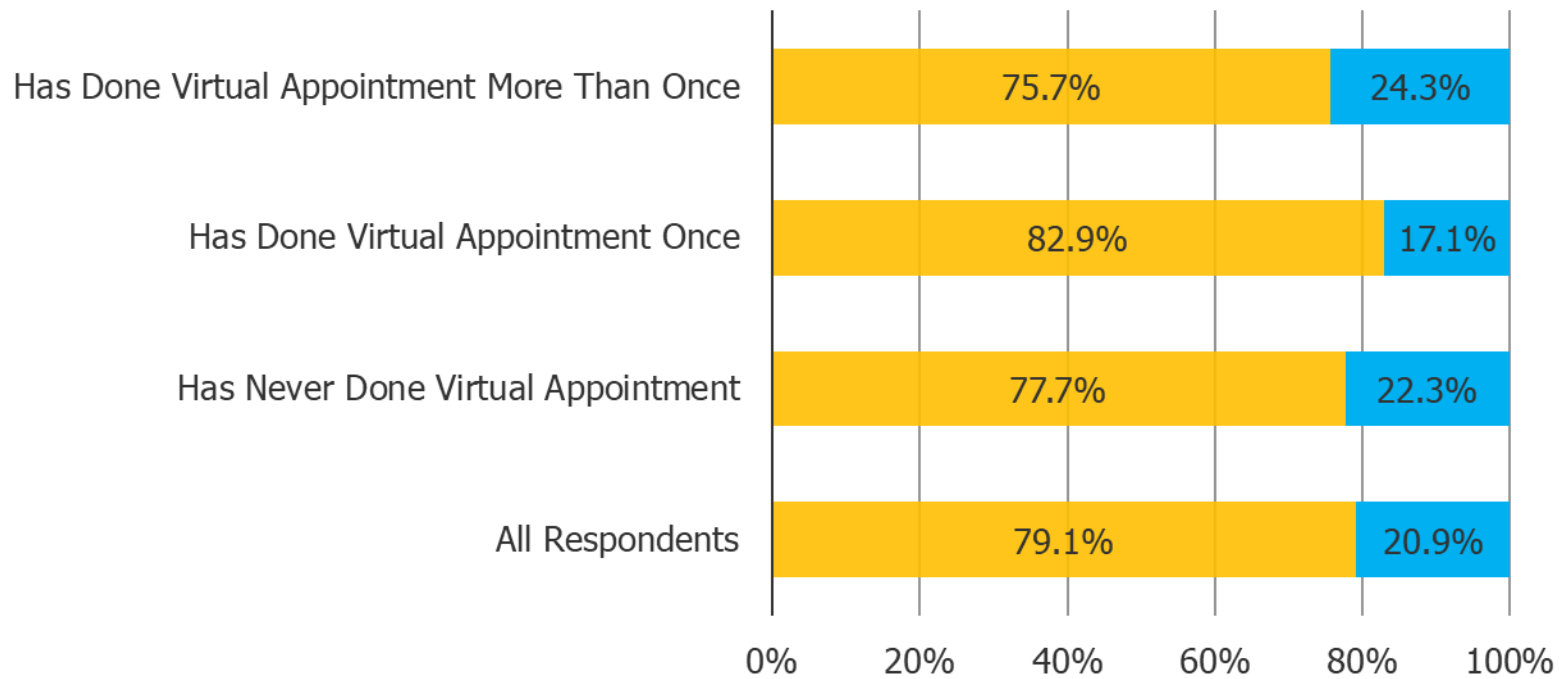*Posed to all respondents who have done a virtual appointment.*

■ In-Person is Better ■ Same ■ Virtual is Better

	In-Person is Better	Same	Virtual is Better
Cost	21.3%	56.2%	22.5%
Convenience	19.3%	38.6%	42.1%
Quality of Care / Outcome of Visit	45.5%	41.8%	12.7%

N = 409

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If you were looking to start a virtual doctor's appointment today, would you be more likely to...
Posed to all respondents.

■ Ask a doctor which app/platform I can use to have a virtual visit with them
■ Find a tele-health app/platform I like and find a doctor up there for my issue

	Ask a doctor	Find a tele-health app
Has Done Virtual Appointment More Than Once	75.7%	24.3%
Has Done Virtual Appointment Once	82.9%	17.1%
Has Never Done Virtual Appointment	77.7%	22.3%
All Respondents	79.1%	20.9%

0% 20% 40% 60% 80% 100%

N = 776

When you think of virtual doctor visits, which app/platform comes to mind first? (Fill-In)

Posed to all respondents who have done a virtual appointment (excluding people who couldn't think of a platform).
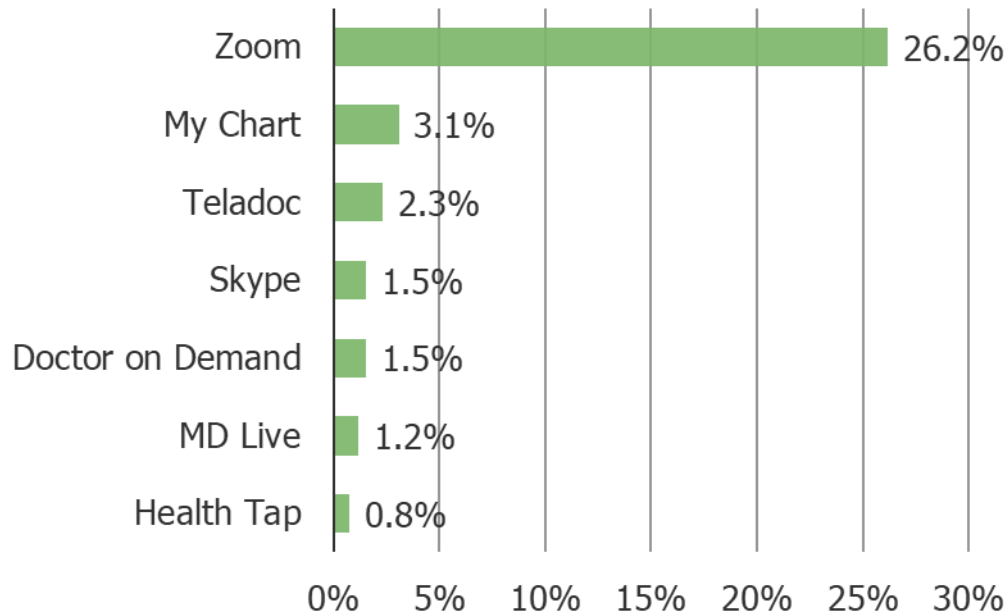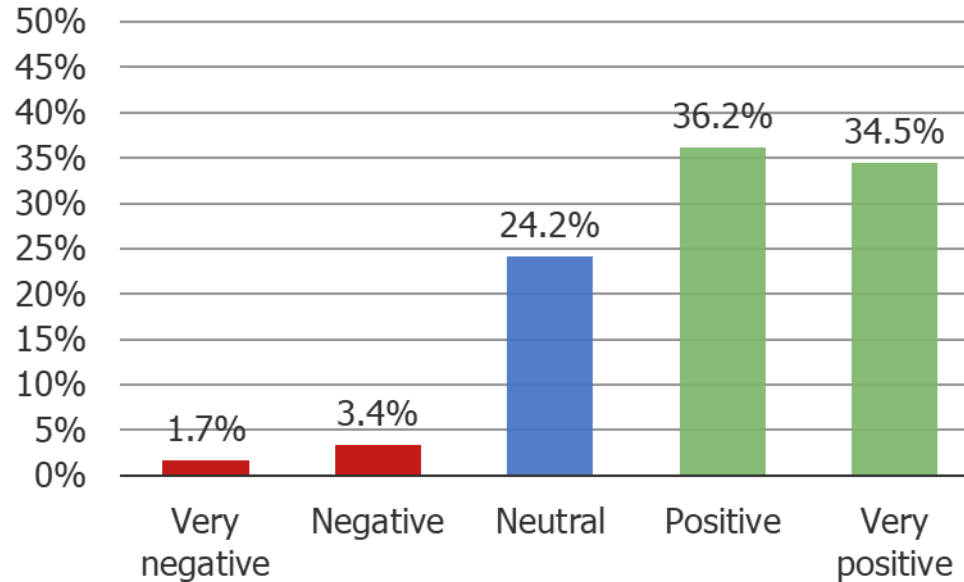

N = 260

What is your opinion of virtual doctor's appointments?

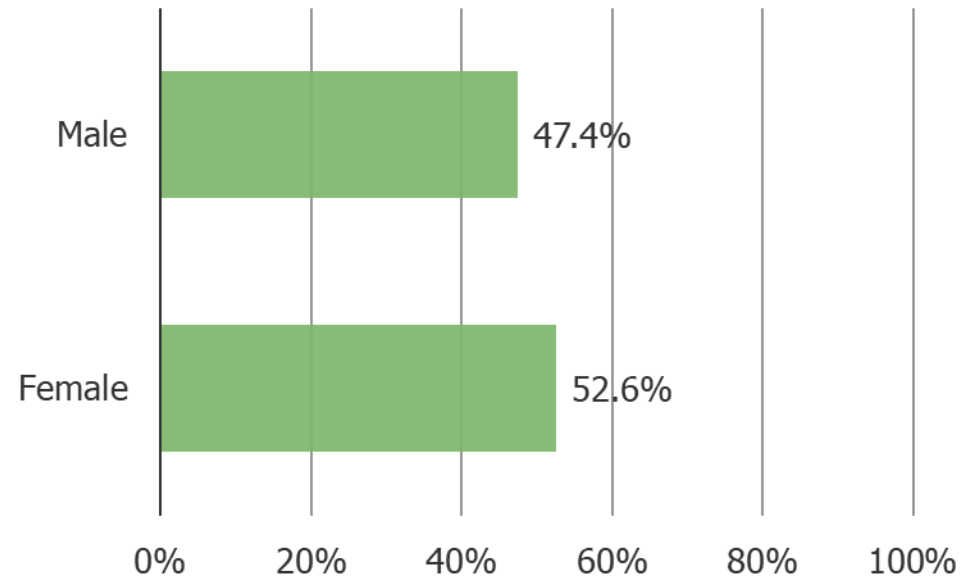*Posed to all respondents who have done a virtual appointment.*

N = 409

Demographics

What is your gender?

Posed to all respondents.

Male — 47.4%

Female — 52.6%

N = 776

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What is your age?

Posed to all respondents.

Age	Percentage
75 or older	4.5%
65 to 74	10.1%
55 to 64	15.3%
45 to 54	15.5%
35 to 44	22.0%
25 to 34	24.4%
18 to 24	8.3%
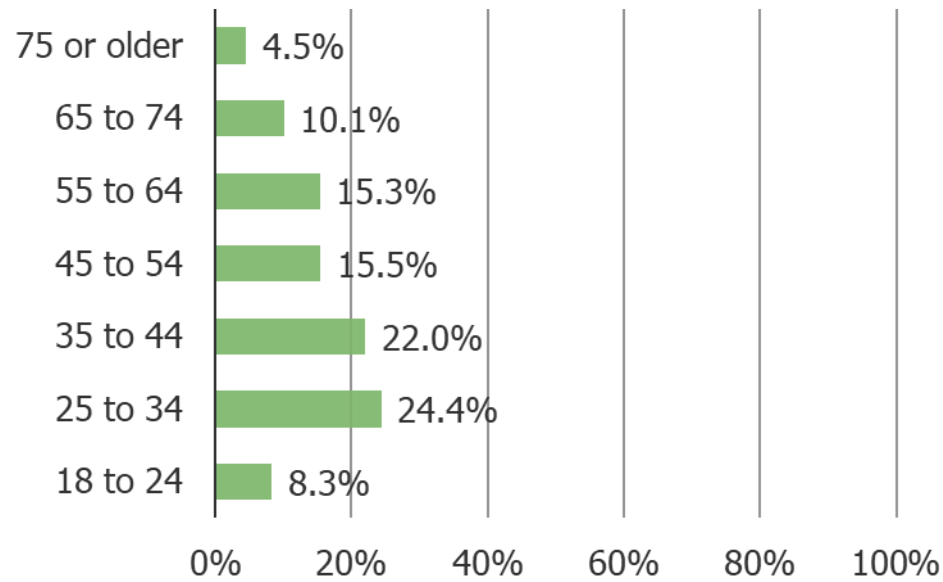
N = 776

What is your approximate average household income?

Posed to all respondents.

Income	Percentage
$200,000 and up	5.4%
$175,000-$199,999	3.5%
$150,000-$174,999	3.6%
$125,000-$149,999	6.4%
$100,000-$124,999	8.0%
$75,000-$99,999	13.4%
$50,000-$74,999	18.4%
$25,000-$49,999	23.3%
$0-$24,999	17.9%

N = 776

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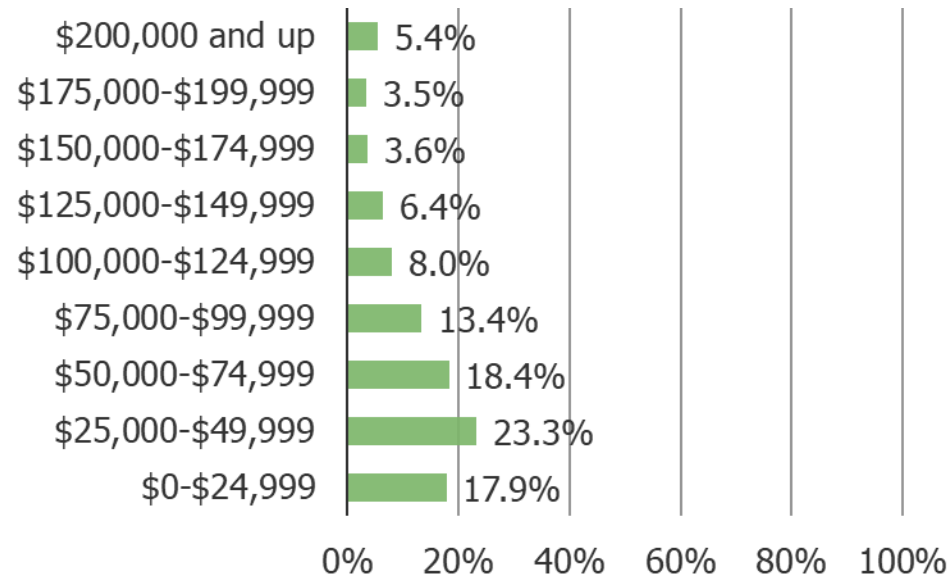
In which region of the United States do you live?

Posed to all respondents.

Region	Percentage
East South Central (Kentucky, Tennessee, Alabama, Mississippi)	4.5%
New England (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut)	5.3%
Mountain (Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah, Nevada)	5.4%
West North Central (Minnesota, Iowa, Missouri, North Dakota, South Dakota, Nebraska, Kansas)	7.1%
West South Central (Arkansas, Louisiana, Oklahoma, Texas)	10.3%
Middle Atlantic (New York, New Jersey, Pennsylvania)	15.5%
Pacific (Washington, Oregon, California, Alaska, Hawaii)	15.5%
East North Central (Ohio, Indiana, Illinois, Michigan, Wisconsin)	15.6%
South Atlantic (Delaware, Maryland, District of Columbia, Virginia, West Virginia, North Carolina,…)	20.9%

N = 776

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Which of the following best describes your current relationship status?

Posed to all respondents.

Relationship Status	Percentage
Married	51.9%
Single, never married	21.1%
Divorced	9.9%
Single, but cohabiting...	5.9%
In a domestic partnership...	5.8%
Widowed	3.5%
Separated	1.8%

N = 776

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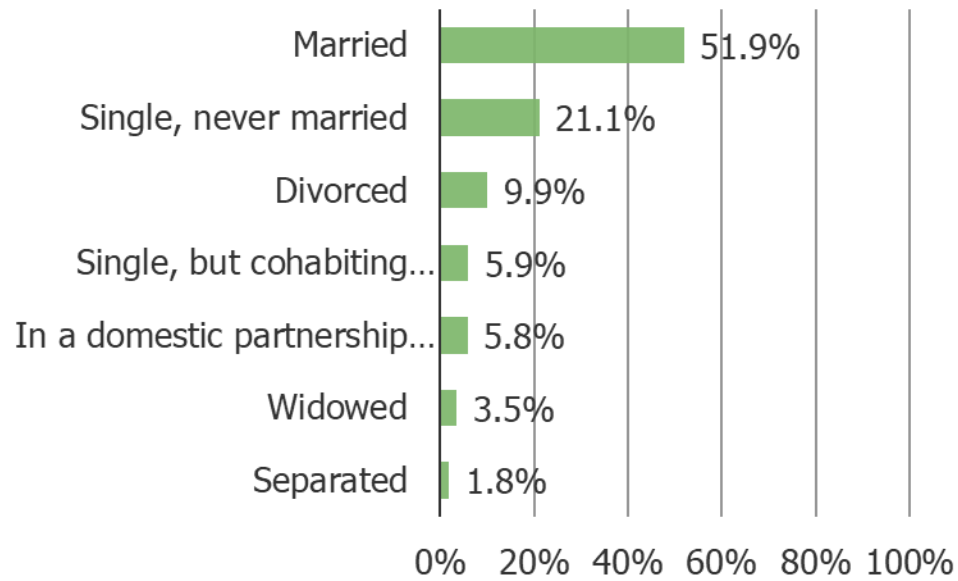
Are you a parent or caretaker of children?

Posed to all respondents.

N = 776

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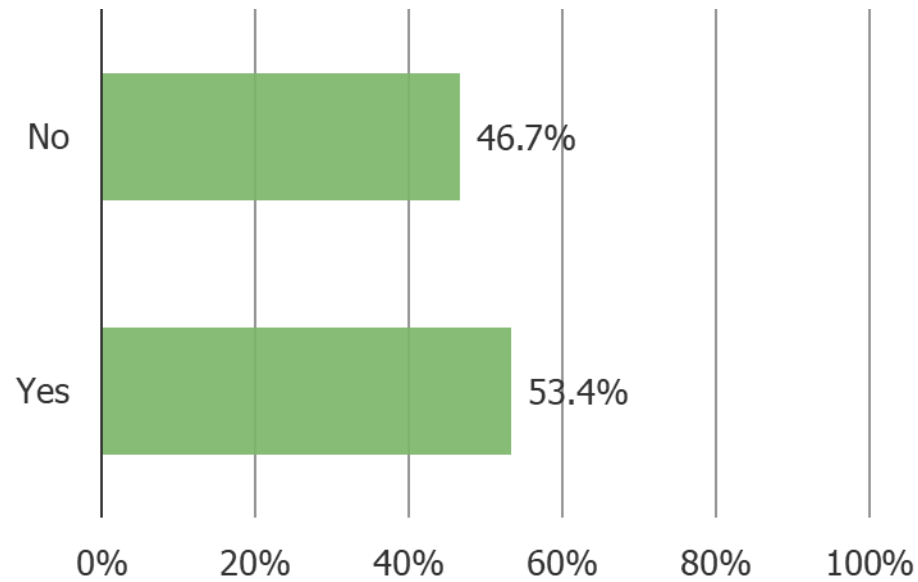
Do you have children who are the following ages? (Select ALL that apply)

Posed to all respondents.

Age	Percentage
Over 21	18.1%
19-21	2.2%
14-18	18.6%
10-13	29.0%
3-9	24.9%
Under 3	7.3%

N = 776