



2022 POINT OF CARE NOW

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Leveraging Opportunity in Telehealth & Virtual Care



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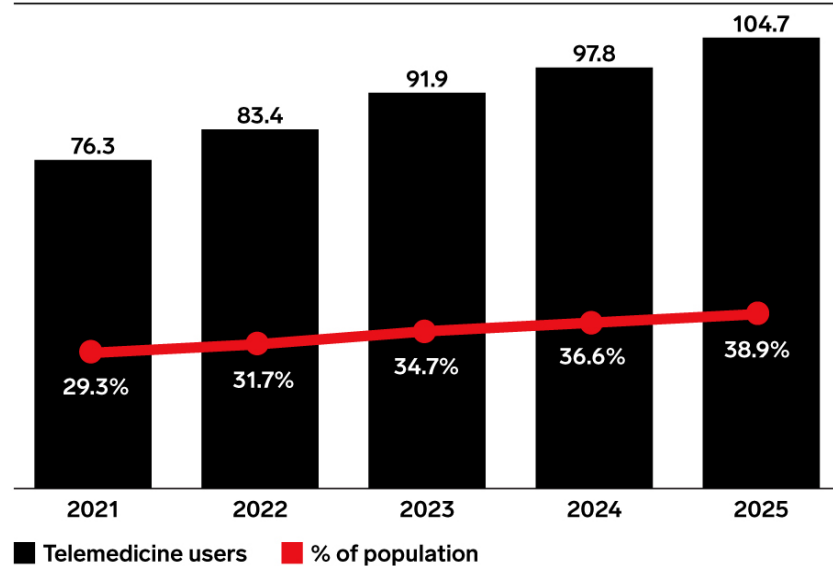


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US Telehealth Trends 2022: What Consumers Really Want from a Hybrid Delivery System

Growth in US Telemedicine Users, 2021 to 2025

US Telemedicine Users, 2021-2025
millions and % of population



Note: age 18+; patients who use real-time audio/video, text, or chat to connect with their physicians or other healthcare service providers from a different location to get a diagnosis, treatment, or care at least once per year; includes billable phone calls; includes two-way, real-time interacting communication for psychological counseling, mental health services, and dietary advice between patients and physicians; includes messaging services and store-and-forward technologies that collect images and data to be transmitted and interpreted over real-time communication later; excludes emails
Source: Insider Intelligence, Aug 2021

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InsiderIntelligence.com

- Hybrid healthcare delivery is here to stay
- The number of telemedicine users will grow to **104.7 million** US adults in 2025 – **38.9%** of the population, according to Insider Intelligence
- Gen Z and millennials will fuel most of this growth
- Gen X will use telemedicine for children and to care for aging parents or relatives
- Home health caregivers will use telemedicine



Who's Using Telehealth in 2021?

US Telehealth Users* Who Are Planning to Use Telehealth Services, by Generation, Oct 2021

% of respondents in each group

Gen Z (18-24)



Millennials (25-40)



Gen X (41-56)



Baby boomers (57-75)



■ Yes ■ No ■ Not sure

Note: in the next 12 months; numbers may not add up to 100% due to rounding; *94% were telehealth users and 6% were potential telehealth users selected to align with the US population on the criteria of age

Source: Insider Intelligence, "US Telehealth Trends 2022," Jan 2022

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[InsiderIntelligence.com](https://www.insiderintelligence.com)

Top Reasons for Using Telehealth Services

What Are the Top Reasons for Using or Planning to Use Telehealth Services According to US Telehealth Users*?

% of respondents, by generation, Oct 2021

	Gen Z (18-24)	Millennials (25-40)	Gen X (41-56)	Baby boomers (57-75)
Reduced risk of transmitting/ contracting contagious diseases	48%	46%	55%	62%
Ability to make an appointment quickly	44%	43%	34%	23%
Less time waiting to be seen by a healthcare professional	38%	44%	48%	48%
Lower cost (e.g., no copays)	38%	28%	25%	24%
Travel time	32%	37%	44%	46%
Ability to receive quality care	24%	25%	18%	16%
More time spent with a healthcare professional	17%	18%	14%	16%
Default option offered by my healthcare professional/practice of choice	16%	15%	10%	14%
Recommendation from someone I trust	13%	14%	8%	6%
Platform's suite of features	7%	10%	4%	2%
Other	1%	1%	4%	5%

*Note: *94% were telehealth users and 6% were potential telehealth users selected to align with the US population on the criteria of age*

Source: Insider Intelligence, "US Telehealth Trends 2022," Jan 2022

Most Favored Methods for Conducting Telemedicine Visits

Methods US Telehealth Users Have Used to Conduct a Scheduled Medical Visits Virtually, by Method Type and Generation, Oct 2021

% of respondents in each group

	Via video	Via audio/ phone call	Via digital chat	Via interactive text or other secure messaging	Other
Gen Z (18-24)	59%	59%	33%	20%	1%
Millennials (25-40)	68%	55%	35%	22%	0%
Gen X (41-56)	62%	49%	20%	14%	1%
Baby boomers (57-75)	50%	55%	15%	9%	3%

Note: n=1,519

Source: Insider Intelligence, "US Telehealth Trends 2022," Jan 2022

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Most Valuable Support Services to US Telehealth Users

Telehealth Support Services that US Telehealth Users* Rate Extremely/Very Valuable, Oct 2021

% of respondents

Live technical assistance with a real person

65%

Full feature set available via online browser (no need for mobile app)

54%

Step-by-step interface walkthrough

53%

Access to general health content information/blogs/articles

49%

Option for monthly or annual subscription membership to access special perks or savings

40%

Ability to talk to an AI chatbot/assistant (e.g., symptom checker, medical questions)

39%

*Note: n=1,609 ages 18-75; respondents were given the choice of "extremely valuable," "very valuable," "moderately valuable," "slightly valuable," and "not valuable"; *94% were telehealth users and 6% were potential telehealth users selected to align with the US population on the criteria of age*

Source: Insider Intelligence, "US Telehealth Trends 2022," Jan 2022



- Hybrid healthcare delivery is here to stay.
- Telehealth is a competitive edge—if it's done right.
- Everyone in the continuum of care has a stake in meeting consumers' raised expectations.