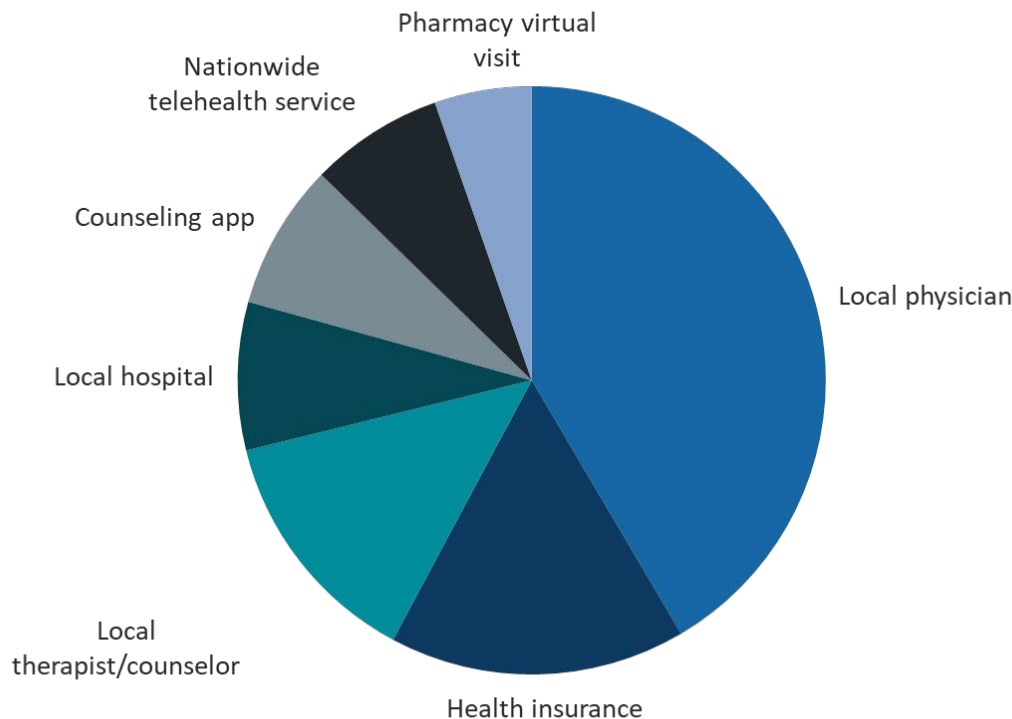


Telehealth Service Channel Breakdown

Telehealth users who used only one service

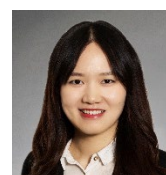


© Parks Associates

Consumer Analytics Team



Yilan Jiang, Senior Director of Consumer Analytics



Sharon Jiang, Consumer Insights Analyst I



Yuting Mu, Research Analyst Intern

Industry Analyst



Kristen Hanich, Director of Research

SYNOPSIS

This study provides trending data on consumer familiarity, use, and demand for telehealth services and connected health devices. It evaluates user experience with telehealth services and investigates consumer appetite for virtual care as a standard offering, outside of crisis conditions.

ANALYST INSIGHT

“Companies are increasingly offering not just primary care, but integrative care with the virtual experience at its core. This includes chronic condition management, mental health, dermatology, and specialist referrals and visits.”

—Kristen Hanich, *Director, Research*, Parks Associates

Number of Slides: 84

CONTENTS

Survey Methodology and Definitions

Defining Connected Health Solutions Models

Key Terms and Definitions

Executive Summary

- Telehealth Service Usage: 2019 to 2022
- Top 3 Reasons for Seeking Care
- Top 3 Barriers to Telehealth
- Remote Diagnostic/RPM Participation in Past 12 Months
- Appeal of Tested Services
- % More Likely to Select Doctor/Care Provider if They...
- Telehealth Service Channel Use in Past 12 Months
- Telehealth Service Channel Share by Age Groups
- Types of Telehealth Services Used by Age Groups
- Preferred Telehealth Device Platform by Age Groups

Overview & Respondent Profiles

- Age Group
- Children at Home
- Respondent Gender
- Educational Attainment
- Household Income
- Prevalence of Health Conditions
- Prevalence of Health Conditions by Type
- Self-Reported Body-Mass Index
- Payment Method of Telehealth Visit

Familiarity and Use of Telehealth

- Familiarity with Telehealth Service
- Types of Telehealth Services Used
- Types of Telehealth Services Used by Children at Home
- Types of Telehealth Services Used by Age Groups
- Types of Telehealth Services Used by Forms of Insurance
- Familiarity with Telehealth Services by Age Groups
- Familiarity with Telehealth Services by Forms of Insurance

Remote Patient Monitoring

- Remote Diagnostics / RPM Participation in Last 12 Months
- April 2021 – Lifetime Program Participation
- Remote Diagnostics / RPM Program Participation in Past 12 Months by Health Condition
- Remote Diagnostics / RPM Program Participation by Age
- Remote Diagnostics / RPM Program Participation in the Past 12 Months by Children at Home

Telehealth Service Channels

- Telehealth Service Channel
- Number of Telehealth Services Used
- Telehealth Service Channel Breakdown
- Telehealth Service Channel by Age Groups
- Telehealth Service Channel by Children at Home
- Telehealth Service Channel by Forms of Insurance

Brand Market Share Analysis

- National Telehealth Service Provider Share
- Mental Health Service Provider Share
- National Telehealth Service Used by Age Groups
- National Telehealth Service Used by Children at Home
- Insurance Makeup of Top Telehealth Companies

Demand for Service Features

- Appeal of Digital Health Services
- Impact of Connected Health Offerings on Choice of Doctor/Care Provider
- Consumer Perception of Telehealth Service Quality
- Likelihood of Using Telehealth Services
- Likelihood of Using Telehealth Services Among Telehealth Users
- Likelihood of Using Telehealth Services by Children at Home
- Likelihood of Using Telehealth Services by Age Groups

Telehealth Drivers and Barriers

- Reasons for Seeking Care via Telehealth Services
- Reasons for Seeking Care via Telehealth Services by Age
- Reasons for Seeking Care via Telehealth Services by Children at Home
- Issue Treated via Telehealth Services
- Highly Important Telehealth Service Features
- High Important Telehealth Service Features by Age Groups
- High Important Telehealth Service Features by Children at Home

- Barriers to Telehealth Use
- Barriers to Telehealth Use by Age Groups

Telehealth UX Preferences

- Preferred Telehealth Device Platform: 2022 vs. 2021
- Preferred Telehealth Device Platform: Telehealth Users vs. Non-Users
- Preferred Telehealth Device Platform by Age Groups
- Preferred Telehealth Device Platform by Children at Home
- Preferred Telehealth Device Platform by Telehealth Service Channel

Connected Health Devices

- Overall Adoption of Connected Health Devices
- Number of Connected Health Devices Owned
- Average Number of Connected Health Devices Owned Per Internet Household
- Adoption & Use of Connected Health Products
- Adoption of Connected Health Products
- Adoption of Connected Health Products by Health Conditions
- Adoption of Connected Health Products by Children at Home
- High Intention to Purchase Connected Health Devices in Next 6 Months
- High Intention to Purchase Connected Health Devices by Income

Wearables

- Wearable Brand Owned by Head of Household
- Most Frequently Used Device



Telehealth & Remote Patient Monitoring: User Experience

SERVICE:
WELLNESS AND
INDEPENDENT
LIVING

3Q 2022

- Primary Wearables Brand by Telehealth Service Usage
- High Intention to Purchase Connected Health Devices in Next 6 Months
- Willingness to Pay for Health-Related Wearable Features

Chronic Conditions

- Telehealth Service Use by Health Conditions
- Preferred Telehealth Device Platform by Personal Health Conditions
- Issue Treated via Telehealth Services by Health Conditions
- High Intention to Purchase Connected Health Devices by Health Condition

Appendix



Telehealth & Remote Patient Monitoring: User Experience

SERVICE:
WELLNESS AND
INDEPENDENT
LIVING

3Q 2022

ATTRIBUTES

Parks Associates

5080 Spectrum Drive
Suite 1000W
Addison TX 75001

parksassociates.com

sales@parksassociates.com

PHONE 972.490.1113

Published by Parks Associates

© 2022 Parks Associates | Addison, Texas 75001

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

DISCLAIMER

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.