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Global Virtual Care Experience

A comprehensive study on patient and provider sentiment towards video-based telehealth

Telehealth Is The New Normal For Millions

The COVID-19 pandemic has led to a surge in video-based telehealth usage, as patients and healthcare providers (HCPs) alike have sought new ways to safely access and deliver healthcare. At the end of 2019, just 8% of U.S. patients in total had ever experienced a telehealth visit, according to the Amwell Telehealth Index. But as the pandemic hit, telehealth usage surged, and McKinsey reports that telehealth utilization was 78X higher in April 2020 compared to two months prior.

More than a year later, telehealth usage has stabilized at levels that are still 38X higher than before the pandemic. In total, an estimated $250 billion of healthcare spend in the US alone has shifted permanently to virtual care. But is this shift a good thing? Do HCPs and patients feel like they are delivering and receiving the same quality of care? And how do the IT decision makers (ITDMs) best support their clinical teams with seamless telehealth solutions that maintain or even improve the quality of care?
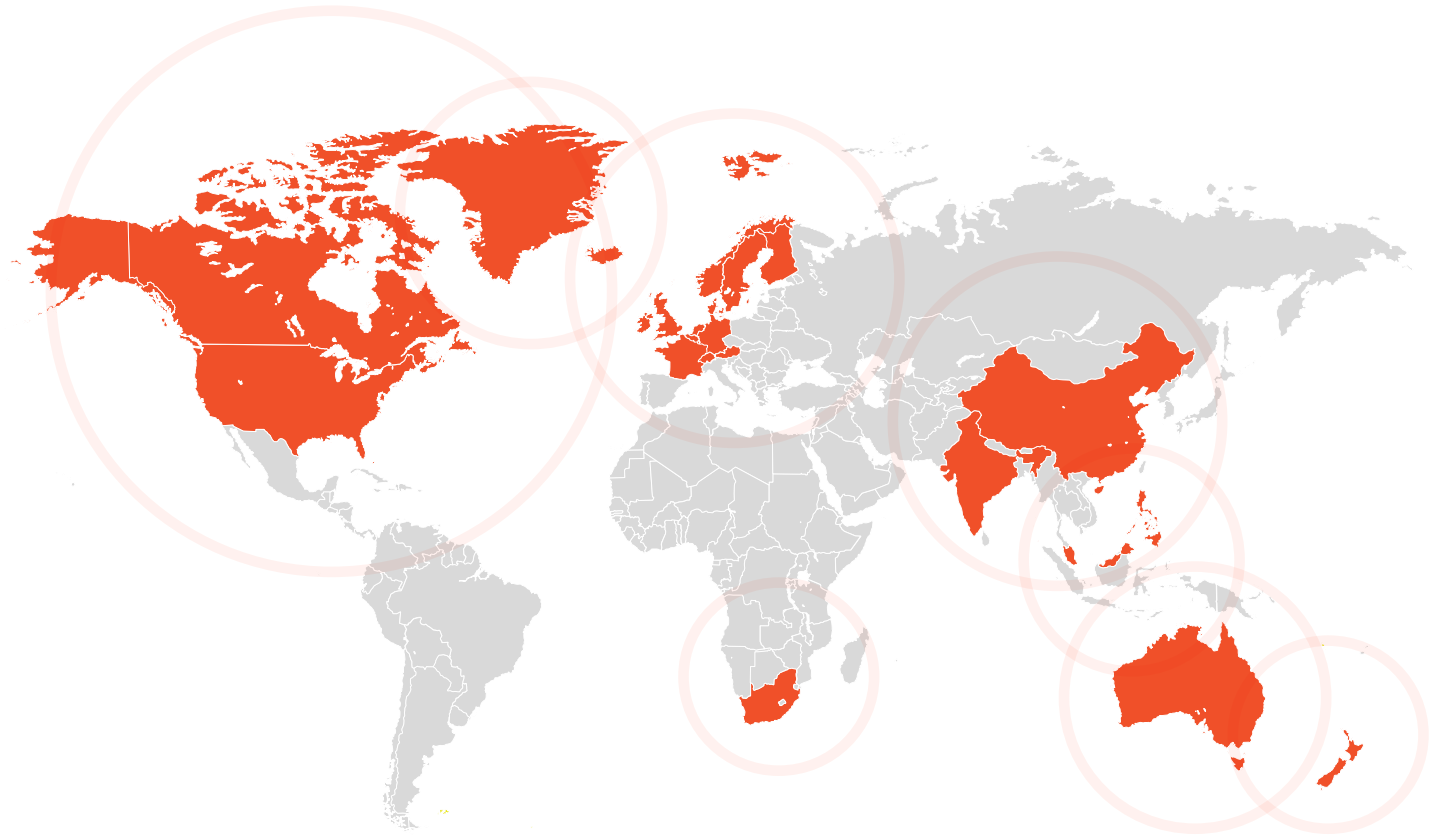

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RESEARCHING THE VIDEO-BASED TELEHEALTH BOOM

To answer these questions, Escalent, on behalf of Logitech, conducted a global survey to get a deeper understanding of the state of telehealth. The survey was conducted in the summer of 2021 with 900 respondents, made up of 754 global patients and 146 global HCPs that had attended or conducted a video-based telehealth visit in the prior 12 months. Both of these audiences were split evenly between North America, EMEA and APAC regions, with the survey conducted in Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Hong Kong, India, Malaysia, Netherlands, New Zealand, Norway, Philippines, Singapore, South Africa, Sweden, Switzerland, the United Kingdom and the United States.

Patients Are Enthusiastic For Telehealth

The survey data supported this COVID-19-induced surge in telehealth usage. Fully 73% of all global telehealth patients reported that they had only attended a video-based telehealth visit for the first time in the past year. The home is the most common setting for telehealth, with 90% of patients having attended a telehealth visit from their place of residence, while more than a quarter (28%) have also conducted video-based telehealth in alternative settings, such as from an inpatient setting (12%), a mobile or emergency situation (11%), or a traditional exam room (10%).
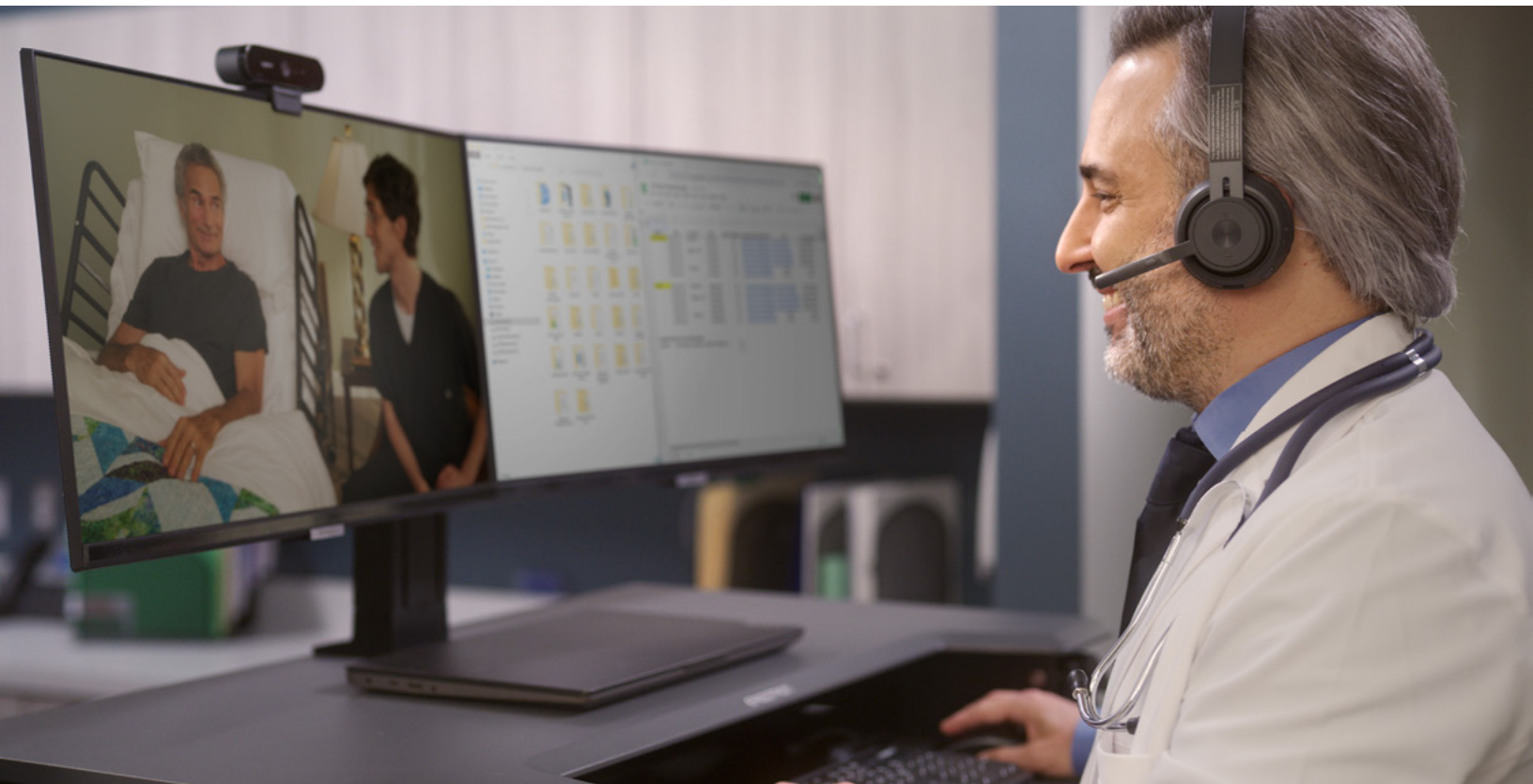
TELEHEALTH EXPERIENCE IS GROWING

What is particularly noteworthy is how quickly patients are adapting to telehealth and how it is becoming a permanent part of the care that their HCP provides them. Nearly half of all global telehealth patients (47%) report that they are now using telehealth on a regular basis for ongoing healthcare, versus just occasional or one-off use cases. And even among those that had their first telehealth visit in the past year, 41% are already regular users.

Moreover, as their experience grows, patients are not only using telehealth more frequently, but also for more conditions. On average, patients have used telehealth to consult their HCP regarding 2.4 conditions on average, rising to 3 conditions on average for those that are using telehealth regularly for ongoing healthcare rather than just episodically. In addition, more than half (53%) of global patients have now seen multiple providers using video-based telehealth, a further indicator that the depth of telehealth usage is growing.

REGULAR USAGE OF TELEHEALTH

47%
of patients use telehealth regularly for ongoing healthcare
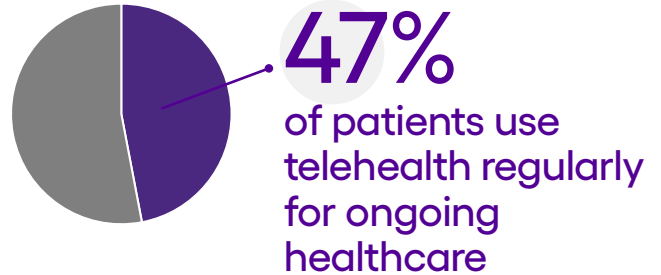
NUMBER OF TELEHEALTH HCPs USED

53%
of patients have seen more than one HCP using telehealth

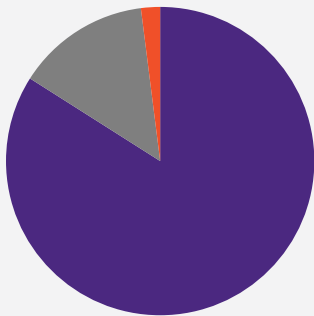escalent
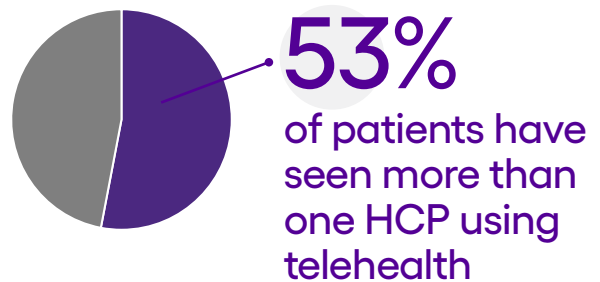
SATISFACTION AMONG PATIENTS IS HIGH

This rapid adoption is spurred on by very high satisfaction amongst telehealth patients. Of all global patients that have used video-based telehealth in the past year, 84% say they are satisfied/very satisfied with the experience, and just 2% express any dissatisfaction. The most satisfied telehealth patients are in APAC, where 91% are satisfied/very satisfied, while Millenials are the most satisfied age group, likely due to their greater comfort levels with the technology.

There are a number of key attributes of the telehealth experience that are driving these high levels of satisfaction. First and foremost, nearly 4 out of 5 patients say they are very confident using telehealth, suggesting that technological hurdles are quickly overcome. In addition, strong majorities state that they are confident their health concerns are addressed, that they feel connected with their HCP as if in the same room, that telehealth is as good as in-person care, and that telehealth is simply more efficient to use.

Nearly 4 out of 5 patients are very confident using telehealth

SATISFACTION WITH TELEHEALTH
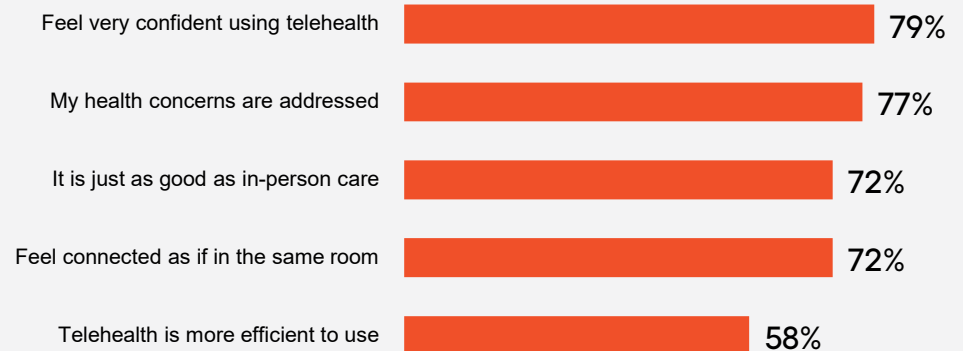
- Satisfied
- Neutral
- Dissatisfied

84% of patients are satisfied with their telehealth experience

REASONS FOR SATISFACTION

Feel very confident using telehealth	79%
My health concerns are addressed	77%
It is just as good as in-person care	72%
Feel connected as if in the same room	72%
Telehealth is more efficient to use	58%

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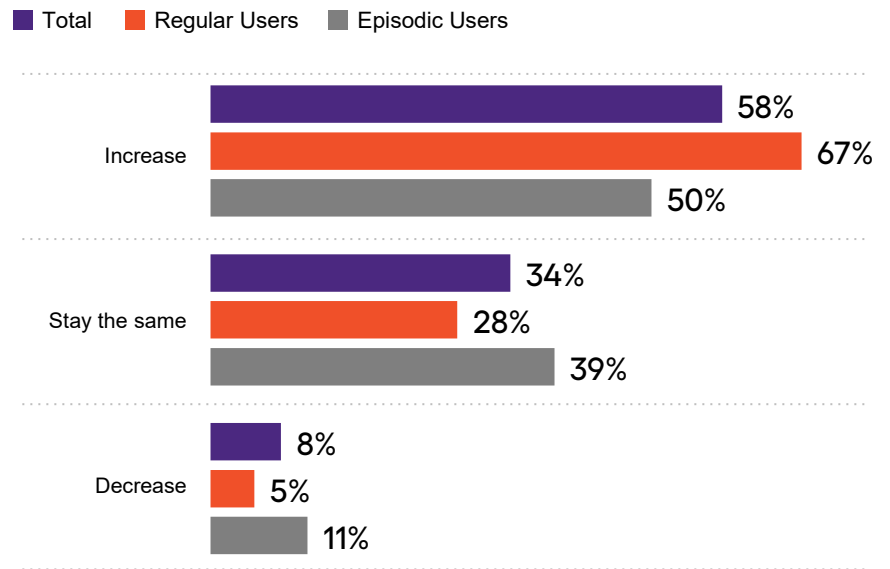
PATIENTS SEE TELEHEALTH AS HERE TO STAY

As a result, it is not surprising that the vast majority of patients believe that the recent surge in telehealth usage is sustainable. In total, 58% believe that their usage will continue to grow over the next year, increasing to 67% amongst patients that already use it regularly. A further third believe current levels will be maintained, while just 8% expect their telehealth usage to drop off.

ANTICIPATED TELEHEALTH USAGE OVER THE NEXT YEAR

■ Total ■ Regular Users ■ Episodic Users

Increase
- Total: 58%
- Regular Users: 67%
- Episodic Users: 50%

Stay the same
- Total: 34%
- Regular Users: 28%
- Episodic Users: 39%

Decrease
- Total: 8%
- Regular Users: 5%
- Episodic Users: 11%

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HCPs Have Some Lingering Concerns

It is easy to look at the data and the burgeoning group of ever-more-experienced telehealth patients with their high levels of satisfaction, and conclude that telehealth is now in the mainstream. That may well be true, but the data from the HCPs does give us some words of caution, and ITDMs need to take note of these as they plan their telehealth strategies.
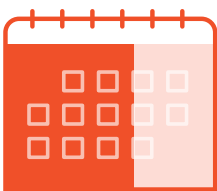
HCPs ARE FAR MORE EXPERIENCED WITH TELEHEALTH

The first thing to note is that compared to patients, HCPs are far more experienced with telehealth. The majority have been practicing telehealth for many years now, with just 39% having conducted their first telehealth consultation in the past year.

They too have experienced the telehealth surge, with global HCPs reporting that on average, about a quarter (23%) of their medical consultations are conducted via telehealth over the past year. HCPs are also far more likely to conduct telehealth from a variety of places, from private and home offices to examination and in-patient rooms. But HCP satisfaction levels don't match patients'
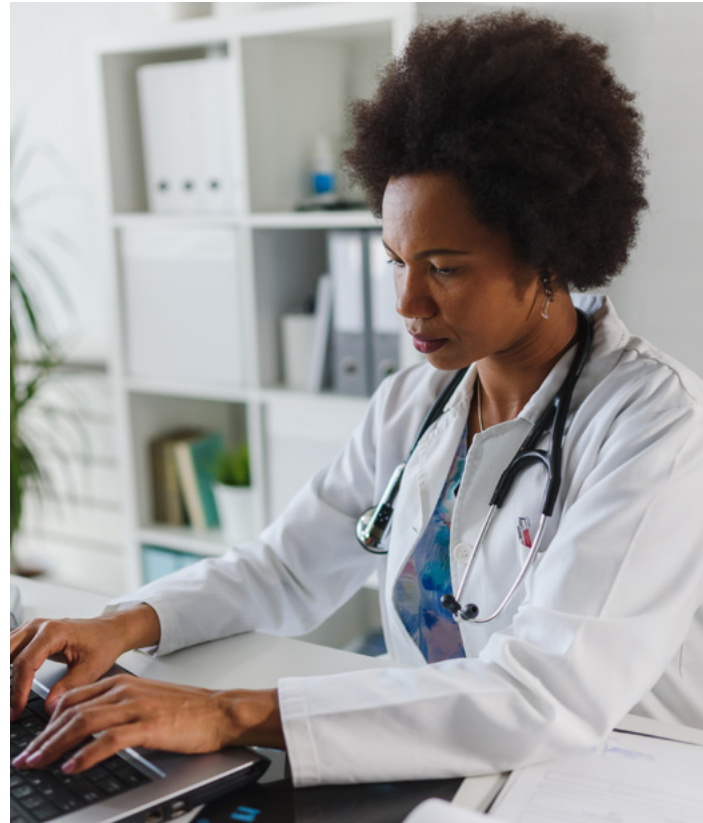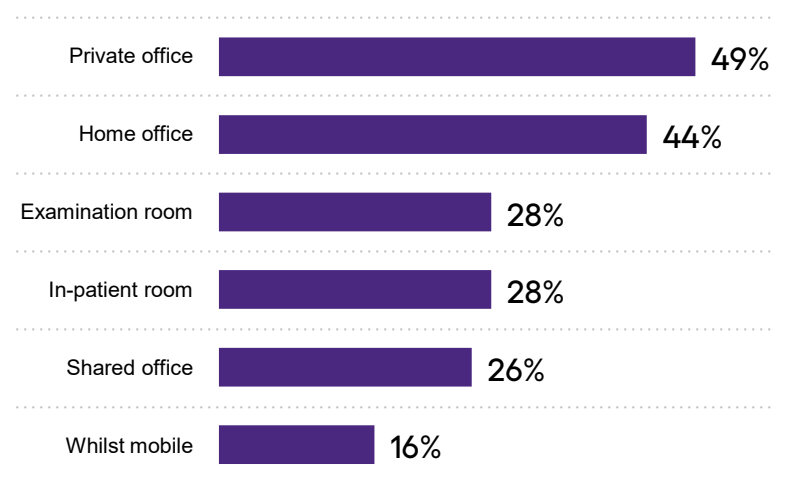
HCP TELEHEALTH EXPERIENCE

61%
of HCPs have been practicing telehealth for more than a year

HCP TELEHEALTH LOCATIONS

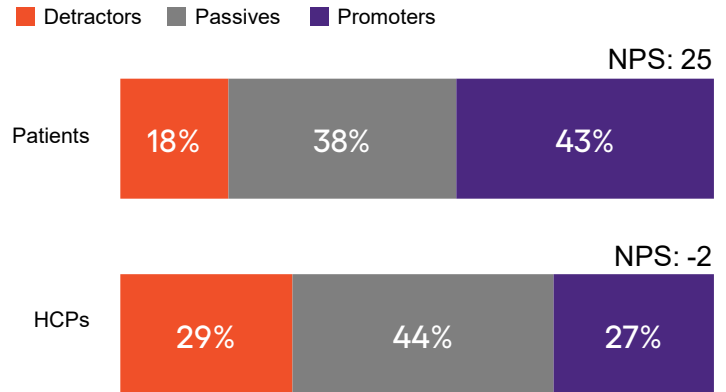| Location	Percentage
Private office	49%
Home office	44%
Examination room	28%
In-patient room	28%
Shared office	26%
Whilst mobile	16%

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BUT HCP SATISFACTION LEVELS DON'T MATCH PATIENTS'

While a strong 71% of HCPs are satisfied with the care they are able to deliver via telehealth, this is significantly lower than the 84% of patients. Some of this reduced enthusiasm may be attributable to the more experienced HCPs having lingering sentiment built up over a number of prior years when telehealth was less easy to conduct. But it is also notable that the HCPs differ dramatically from the patients in terms of some of the key benefits that they see driving their satisfaction, notably being just as good as in-person care, feeling connected as if in the same room, and being more efficient.
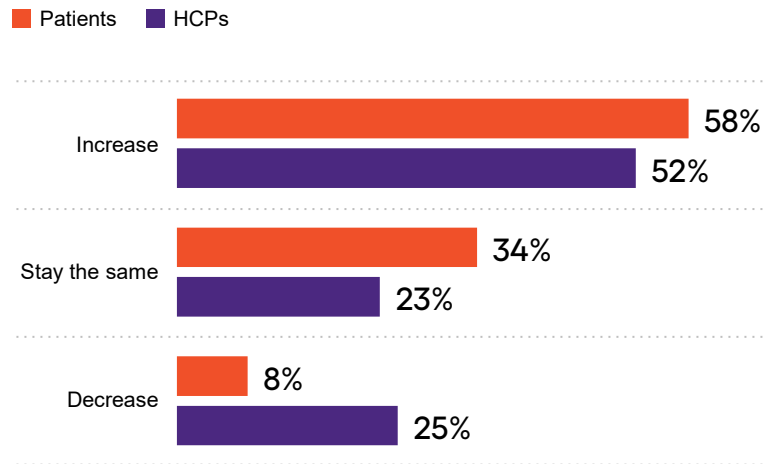
As a result, HCPs are far less likely to be advocates for telehealth. When asked how likely they would be to recommend video-based telehealth to a friend/colleague - the classic determinant of Net Promoter Score (NPS) - HCPs are significantly less likely to be promoters and significantly more likely to be detractors, resulting in a negative NPS score of -2 versus the patient score of 25.

This also translates into their view of the future of telehealth. While a majority see their usage of telehealth increasing over the next year, a significant minority of a quarter of HCPs see their usage of telehealth actually decreasing, three times the rate of patients.

LIKELIHOOD TO RECOMMEND TELEHEALTH

■ Detractors ■ Passives ■ Promoters

NPS: 25

Patients

| 18% | 38% | 43% |

NPS: -2

HCPs

| 29% | 44% | 27% |

ANTICIPATED TELEHEALTH USAGE OVER THE NEXT YEAR

■ Patients ■ HCPs

Increase
58%
52%

Stay the same
34%
23%

Decrease
8%
25%

Why Are HCPs Less Enthusiastic About Telehealth?

Much of the lower sentiment among HCPs can likely be attributed to historical experience with telehealth, a preference for the "normal" way of doing things, and potentially a resistance to change. But ITDMs take note: Upon digging deeper into the data, it's clear that for many HCPs, it is because they don't feel that their technology is sufficiently good enough to deliver the quality of care that they expect to deliver.

Certainly things have improved from the early days of telehealth. Over two-thirds (68%) of global HCPs believe it is easy or very easy to use the technology required for video-based telehealth, and when asked to compare ease of use over the past year to previous years, nearly three quarters (72%) feel that it has improved still further.

However, technology remains a significant barrier for HCPs. When asked about technical issues such as ease of connecting or audio or video quality, HCPs were approximately three times more likely than patients to report difficulties. A remarkable statistic, given that most HCPs can rely on the support of IT experts, something that few patients have access to.

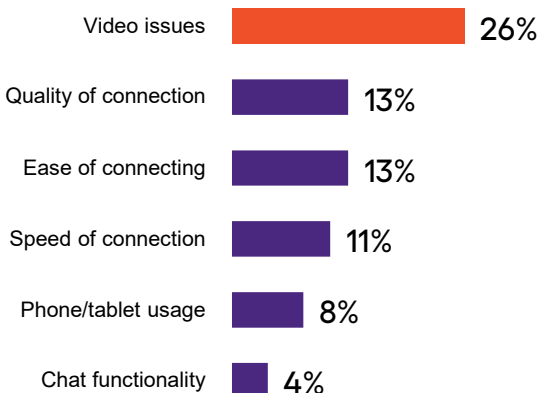## Technology remains a significant barrier for HCPs.

HCP VIDEO QUALITY IS THE BIGGEST ISSUE

By far the biggest issue is the video quality that HCPs are able to deliver to their patients. Of those HCPs experiencing technical difficulties, 26% pointed to video issues such as their video resolution or zoom capabilities as being problematic, twice as much as the next largest issue (quality of internet connection and ease of connecting were next at 13%).

What is even more remarkable is that 82% of all global HCPs have experienced technical issues with their video quality over the past year, issues that they deem serious enough to disrupt the quality of care that they deliver to patients. This rises as high as 89% in some APAC countries, and includes issues such as low resolution, blurring, pixilation and their video feed having poor lighting quality. This is backed up by the data from patients, with the majority (53%) saying they have experienced issues with the video quality provided by their HCP.

BIGGEST TECHNICAL CHALLENGES FOR HCPs

Challenge	Percentage
Video issues	26%
Quality of connection	13%
Ease of connecting	13%
Speed of connection	11%
Phone/tablet usage	8%
Chat functionality	4%

HCPS EXPERIENCING VIDEO ISSUES

82% of HCPs have had serious issues with the video quality they provide to patients

93%

Better video quality improves the patient experience.

92%

Poor video quality reduces the likelihood of future telehealth visits.

77%

Critical that patients see HCPs as "professional" on their camera.

68%

Poor video quality could lead patients to choose other providers.

HCPs FEAR THE RAMIFICATIONS OF POOR VIDEO QUALITY

This is a very big deal for HCPs. More than 9 in 10 see video quality as being a critical contributor to the patient experience, and poor video quality as not only reducing the quality of care that they can deliver, but also reducing the likelihood of the patient attending future telehealth visits. Indeed over two-thirds of global HCPs worry that poor video quality could lead to their patients choosing another HCP altogether. As the data shows patients becoming ever-more experienced and confident with telehealth, expectations of HCPs will rise, so this concern is not unfounded.

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The Technological Imperative

McKinsey reports that 13-17% of outpatient visits in the US alone now occur via video-based telehealth (depending on medical specialty). This is clearly a massive shift in how healthcare is being delivered, but also shows that there is still plenty of room for growth. And while the research data shows that patients - especially the recent adopters over the past year - are enthusiastic about the experience, the more experienced HCPs see opportunities for technical improvements, especially when it comes to the video quality they are able to deliver to their patients.

As a result, the ITDMs that are supporting clinical teams need to focus on the following critical areas of video as it relates to telehealth in order to increase access to care, enhance patient experiences and improve outcomes:

UTILIZE HIGH-QUALITY, ENTERPRISE-GRADE VIDEO COMPONENTS

Nearly all HCPs recognize that their video quality is crucial to the patient's experience as well as their ability to deliver quality care. And the research showed that one of the biggest drivers of patient satisfaction with video-based telehealth is when they feel connected with their HCP as if they were in the same room. Quite simply, the continued growth of telehealth and quality of care rely on the video quality that HCPs are able to deliver, and it's therefore crucial that ITDMs ensure their HCPs have high quality video components wherever they are conducting their video-based telehealth visits.

93%
of HCPs believe better video quality improves patient experience.

PLAN FOR ANYTIME, ANYWHERE USAGE

The data shows that half of HCPs are already delivering patient care from their home and/or private offices, and almost 1 in 5 are even doing it while mobile. ITDMs therefore need to think beyond their clinical facilities and ensure that their HCPs have the ability to deliver razor-sharp video in remote settings as well. This includes careful consideration of peripherals.

Nearly half of HCPs (43%) also currently use external components when conducting video-based telehealth visits, and by far the most common is an external webcam, used by 62% of global HCPs and as much as nearly three quarters of HCPs in APAC. This further underlines the importance that HCPs place on the video quality they are providing to their patients, and ITDMs need to ensure that they fully support this with quality video products.

50%
of HCPs conduct telehealth visits from home/private offices.

DEPLOY FULLY INTEGRATED ONE-ROOM SOLUTIONS

At least a quarter of HCPs have conducted video-based telehealth visits from shared settings, such as conference rooms, inpatient rooms and shared offices. The challenge for ITDMs is ensuring that the HCPs are able to deliver a consistent experience to patients, when multiple HCPs with varying devices can cycle through a single room in any given day, while a single HCP might deliver video-based telehealth visits from the ICU to a huddle room.

The answer is consistent and fully integrated, one-room solutions across the facility, using technology such as all-in-one video bars and touch controllers. For ITDMs these are far simpler to set up and integrate within existing workstreams, and are lower maintenance compared to bespoke solutions. More importantly, they are seamless and convenient for the HCPs no matter where they are in the healthcare facility, and ensure that they are able to deliver a consistent experience to their patients.

MAKE VIDEO-BASED TELEHEALTH PLATFORM AGNOSTIC

Across the world, HCPs are using multiple software platforms to deliver video-based telehealth. The data shows that 40% of HCPs use more than one platform, with commercial cloud-based solutions (e.g., Zoom, Microsoft Teams, and Google Meet) dominating the space with 59% of HCPs using them, while nearly a quarter (23%) are using proprietary solutions.

While ITDMs have focused a lot of energy on trying to get HCPs operating on a single platform, the reality is that there are good reasons why they might need to use more than one - such as delivering telehealth from different facilities, or adapting to the preferences of patients. It is therefore critical that ITDMs offer their HCPs the flexibility of delivering telehealth on any platform as needed, which means investing in solutions that seamlessly integrate with all major video-conferencing software platforms to maximize the IT investment.

1 in 4
HCPs conduct telehealth visits from shared settings

40%
of HCPs use multiple software platforms for telehealth

FOCUS ON EASE OF USE

HCPs might be highly qualified doctors or nurses, but that doesn't mean that technology always comes easy. A third (32%) of HCPs indicated that they don't find it easy to use the technology associated with video-based telehealth, and ITDMs need to respond to this by focussing on solutions and support that emphasize ease of use. This may range from simple features such as using touch controllers in meeting rooms and one-click setup, to providing simple 1-2 minute videos that help users quickly learn the technology, making it intuitive for HCPs to use video-based telehealth within their existing workflows.

1 in 3

HCPs don't find it easy to use telehealth technology

LOWER THE COSTS AND BURDENS OF SUPPORT

ITDMs already face significant challenges. M&A integration and the rapid expansion of health systems has meant rampant inconsistency across infrastructure, software, and hardware, making it difficult to integrate, monitor, and manage devices at scale. And HCPs themselves are often resistant, soured by previous tech implementations that didn't deliver the promised value in their workflows. When you consider that 75% of HCPs now expect telehealth services to either remain at their current elevated levels or grow still further, this presents a whole new world of pressure for ITDMs.

It is therefore critical for ITDMs not to add to their pre-existing burden, but rather to focus on flexible solutions that are already certified and compatible within their existing digital health ecosystem, and can ensure a smooth deployment and improved acceptance with minimal change to existing clinical workflows.

75%

of HCPs expect telehealth usage to grow or remain elevated over the next year

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In Conclusion

Video-based telehealth exploded into the mainstream during the COVID-19 pandemic, and all indications are that it will continue over the long term at dramatically higher levels than pre-pandemic. This is true across the globe, regardless of the unique operating conditions of healthcare in different countries, and is spurred on by patients that are exceptionally positive towards the telehealth experience and foresee their own usage of it growing in the future.

HCPs share this same positivity, but it is laced with some prudent concerns regarding their ability to deliver high quality video consultations, despite the strong progress that has been made in recent years. They are very aware of the importance of the video quality that they deliver, yet the majority still experience issues that stop them from performing at their best.

For ITDMs that are supporting their clinical staff, knowing that telehealth will only continue to grow from its already-elevated levels, this demands action. It means that now is the time to identify and deploy video-based healthcare solutions that can deliver on the promise of a consistent, seamless telehealth experience today, and grow with the industry as it expands in the years ahead.

About the Research

This research was conducted in July 2021 by Escalent, on behalf of Logitech, with 754 global patients and 146 global HCPs. The research was conducted as a web survey, with respondents drawn from global research panels, and qualifying to participate in the survey if they had attended or conducted a video-based telehealth visit in the prior 12 months (among other screening questions). Both the patient and HCP audiences were split evenly between three regions: North America, EMEA and APAC, with respondents sourced from Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Hong Kong, India, Malaysia, Netherlands, New Zealand, Norway, Philippines, Singapore, South Africa, Sweden, Switzerland, the United Kingdom and the United States. Full data for the survey can be provided upon request.

About Logitech

At Logitech, we believe providers should be empowered to naturally build trust with patients, regardless of geography or setting. Our mission is to help people make a real connection without barriers—whether it's doctors discussing care options with their patients, providers consulting one another, or families communicating with loved ones. We offer an enhanced telehealth experience—one that's consistent, reliable, and drives user adoption for clinicians and patients—leading to a new standard of virtual care and building the healthcare ecosystem of the future.

In this period of digital health transformation, Logitech helps IT personnel overcome the challenges of deploying telehealth, such as cost and inconsistency of experience, by providing high-quality, enterprise-grade video at a scalable price point. Our solutions integrate seamlessly and securely with all major video conferencing applications, leading telehealth platforms, and healthcare equipment vendors, powering critical real-time human connection between care providers and patients. We help providers rethink what's possible from a patient's bedside, a provider's home, and anywhere in between.

To learn more, visit logitech.com/healthcare.

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About Escalent

Escalent is a top human behavior and analytics advisory firm specializing in industries facing disruption and business transformation. As catalysts of progress for more than 40 years, we transform data and insight into a profound understanding of what drives human beings. And we help businesses turn those drivers into actions that build brands, enhance customer experiences and inspire product innovation.

This insights report was a collaboration between Escalent's Healthcare and Technology practices, each bringing their unique knowledge and expertise to the field of telehealth and virtual care. The Healthcare practice consists of dedicated professionals with long tenures in life sciences, patient care and the manufacturing side of healthcare. They are highly specialized experts in helping Pharma and Health System organizations solve their business challenges, and led to Escalent being named a 2020 Top Market Research organization by the American Medical Association. The Technology practice is a team of experts that partner closely with global tech and telecom organizations and excel at delivering game-changing insights for the cutting edge technologies of tomorrow.

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