



THE CURRENT STATE OF **Patient Engagement**

Survey Results from Patients and Clinical Staff





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Note from CEO **Brad Brooks**

For over a decade, we have witnessed the slow pace at which various virtual care, telehealth, and care team collaboration technologies have been adopted by health systems in the United States. **But in 2020, the extreme circumstances of Covid-19 forced a reckoning – rapidly adopt these technologies or face catastrophic tolls on patients, staff, and hospital finances.**

Workflow chokepoints and inefficiencies from aging technologies and communication tools have a deeply negative impact on care quality due to a lack of timeliness of information, poor usability, and siloed data. Clearly, we can do better, and the recent health crisis has crystallized the need for rapid change.

Out of necessity, organizations that sat on the fence for years have now committed to adopt and implement tools such as telehealth and improved

care team collaboration platforms. This is a step in the right direction. Extensive implementation of these modern solutions are helping provide vital care for patients, adding a layer of safety for staff, and creating a new path to reimbursable consults.

The goal of our 2020 State of Patient Engagement survey is to uncover insights into the direct needs and preferences of both patients and care professionals as they reflect on the fears, concerns, and perceived solutions related to providing and receiving care virtually. It is our hope that the data and information provided will help inspire and motivate others to continue to pursue telehealth advancements so we are all far better prepared for the next pandemic that will inevitably present itself.



Brad Brooks
CEO and Co-Founder
TigerConnect



Executive **Summary**

The severe and potentially lasting impact of the Covid-19 outbreak was clearly reflected in the findings of this survey, providing a strong indication that the need for telehealth and broader virtual care solutions has been critical during this pandemic.

With an event of such magnitude comes turbulent challenges, as well as an abundance of new opportunities. As a result, the effects on healthcare, technology, care availability, and accessibility have demonstrated and expedited what many of us have known all along: **Telehealth is here to stay.**

Virtual care and telehealth spiked exponentially at the start of the Covid-19 outbreaks, accounting for **95%*** of all doctor visits, settling more recently between **25%** and **40%** – still a remarkable increase from its **5%** pre-pandemic level, with usage expected to continue to slowly climb as both payers and providers embrace the benefits of remote care.

Key Survey Findings

In our State of Patient Engagement 2020 report, we partnered with The Harris Poll organization to gather survey results from over 2,000 patients across the United States, as well as more than 500 clinician respondents sourced from our own database. The survey was conducted between July and August 2020.

The main takeaways provide a snapshot of where patient engagement stands today while providing indicators of where it may be headed.

- Patients and clinicians enjoy using telehealth, cementing its position as a mainstay
- Feature-rich solutions deliver more perceived value than consumer solutions
- Ease-of-use is an important consideration when selecting a virtual care vendor

*Heather Landi, "Mayo Clinic's Halamka: Telehealth boom slowing, but don't expect it to go back to pre-COVID rates," Fierce Healthcare, September 2, 2020.

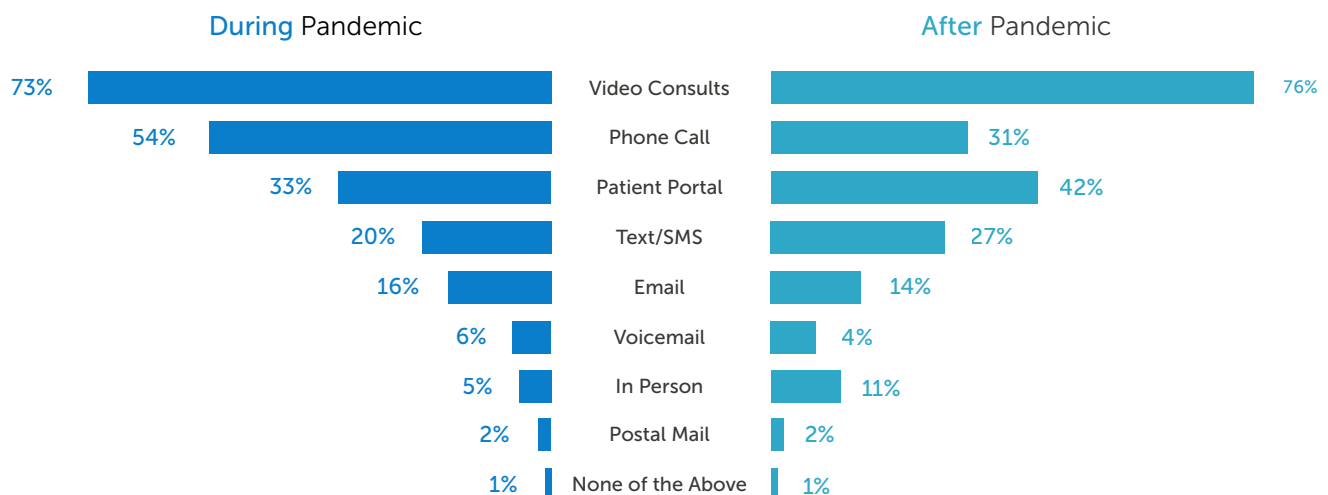
Pandemic Findings

During the Covid-19 pandemic, telehealth has emerged as arguably the most viable, accessible, and safe option available for conducting patient evaluations.

As a result, provider organizations saw significant increases in the following:

- **73%** increase in video consults
- **54%** increase in phone/voice usage
- **20%** increase in secure texting and SMS

These methods are expected to have a lasting increase in use, even **after** the current pandemic subsides.



According to providers currently using a telehealth solution:

- **84%** feel it's a safe alternative to office visits during the pandemic
- **88%** of individuals have personally seen increases in telehealth use as a result of the pandemic
- **71%** expect the use of telehealth as a whole to remain the same or grow long after the pandemic subsides

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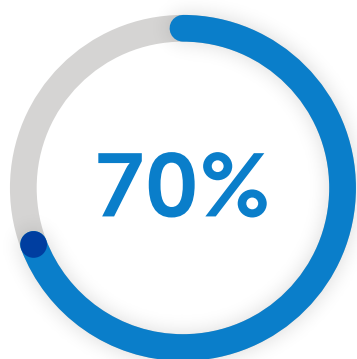
01

Patients Are Pleased with Telehealth and
Intend to Continue Using It

Telehealth Overview

A large majority of individuals who have used telehealth and virtual care services in the last year are either satisfied or very satisfied with their experience (87%). Additionally, most are at least somewhat likely to use it again in the future (80%).

What is it that people are predominantly seeking in a telehealth solution? Results show a strong preference for **ease-of-use, quick responses, and convenience.**



Recognize telehealth's fundamental value

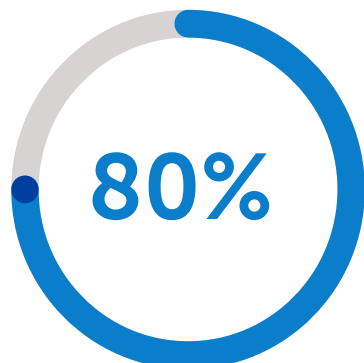
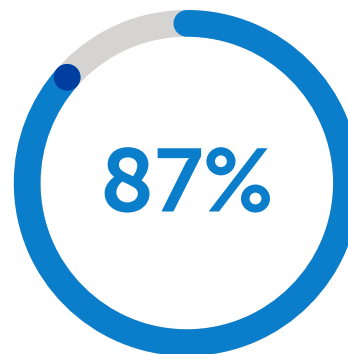


Over 70% of patients believe it's at least somewhat important for a healthcare provider to offer telehealth services.



Are satisfied using telehealth

87% were at least somewhat satisfied with their last telehealth experience and nearly 50% were very satisfied.



Expect to use telehealth again

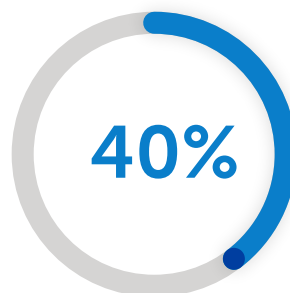


80% indicated they were at least somewhat likely to schedule another telehealth consult in the future.

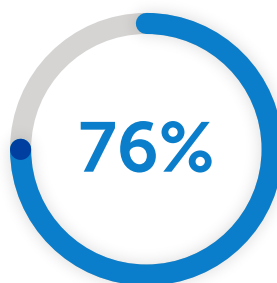
Telehealth Usage and Availability

The adoption of telehealth by individuals is directly dependent on a growing number of providers offering these services as an option to patients.

As more providers offer varying degrees of virtual care solutions and methods, a growing number of patients are using them, especially during a time of social distancing.



40% have used telehealth in the last year to some degree.



76% used telehealth in the last year when they needed to see/speak to a doctor and were given the option.

Among individuals that had not used telehealth in the last year...

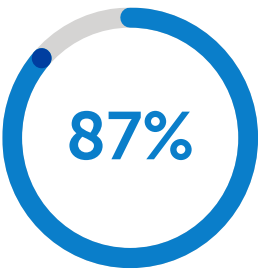
Popular reasons included an in-person visit being required (**24%**), not knowing it was an option (**18%**), and it not being offered (**13%**).



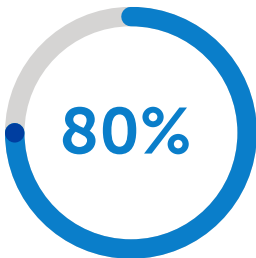
60% would be at least somewhat likely to use it for their **next non-emergency doctor visit or care professional interaction.**

Telehealth Satisfaction

The overwhelming majority of individuals who used telehealth in the last year were satisfied with their experience, with the majority claiming to be very satisfied. The majority of this group also feel it’s an effective alternative to in-person care and are highly likely to use it again.

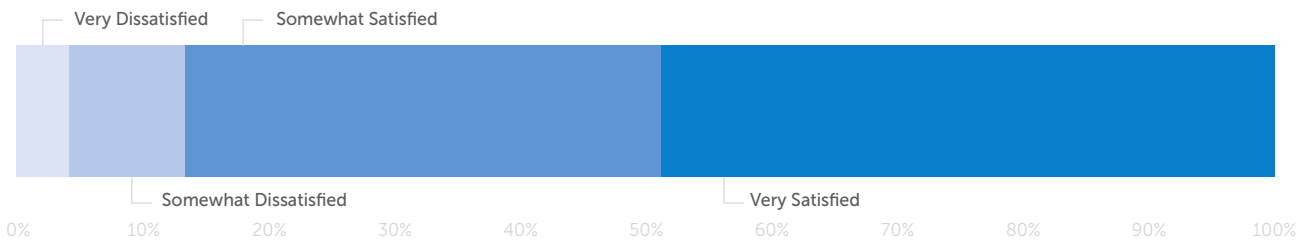


87% were at least somewhat satisfied with their last telehealth experience.



80% are at least somewhat likely to schedule another telehealth consult in the future.

How satisfied or dissatisfied were you with your most recent telehealth consult experience?



Telehealth vs. In-Office Visits

Around 63% of patients prefer or are open to receiving telehealth consultations as an effective, dependable alternative over in-person consultations. The ability to reduce wait times, transportation costs, and stress

is appealing for the majority of individuals involved in their personal healthcare. Situations that may not require an in-person visit are increasingly being conducted through a quick voice or video session.

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02

Telehealth Is Expanding
**to Meet Shifting Needs
& Preferences**

Demand for Telehealth

Regardless of whether or not they had actually used telehealth in the last year, **more than 70%** of patients believe it's at least somewhat important for a healthcare provider to offer the option of telehealth services to their patient base. Care delivery is evolving and so are the demands of patients and providers.

With the expansion and availability of virtual care, patient expectations are shifting towards wanting a convenient alternative to hospital visits.



Preferences & Efficacy of Telehealth

Reviewing the data from **over 500** clinician participants, **79%** of respondents confirmed utilizing a telehealth solution. Their favored methods of telehealth communication outside of a hospital or doctor’s office are not far from those of patients.

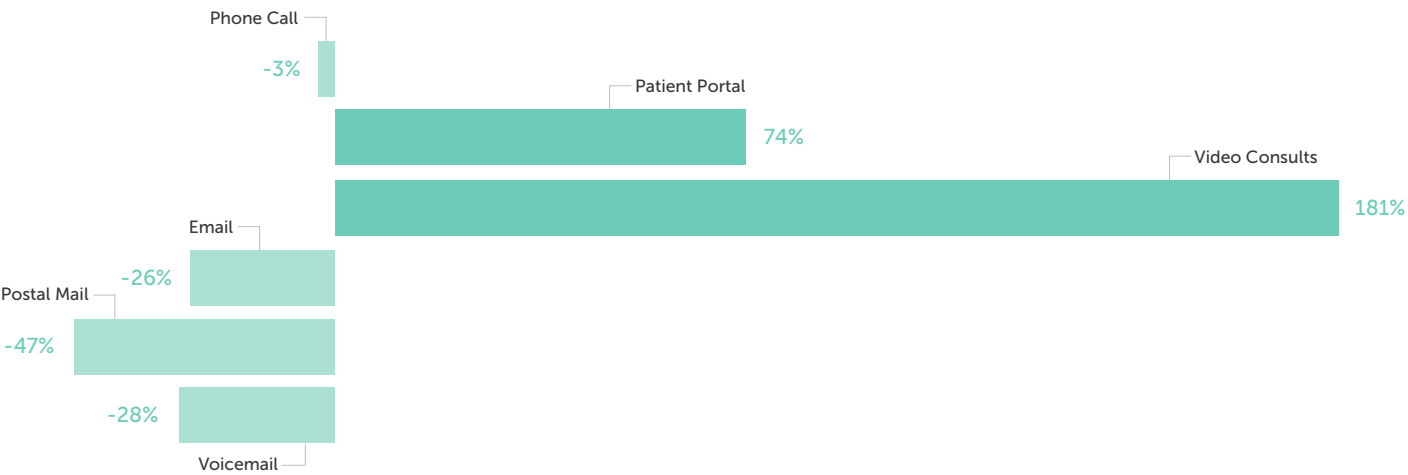
When a provider gets the opportunity to use a telehealth solution, their sentiment towards associated virtual care methods increases dramatically.



3X: Providers who have the option of conducting telehealth sessions are nearly twice as likely to prefer using this method than providers who do not have access.

Conversely, preference for phone calls **(-3%)**, email **(-26%)**, postal mail **(-47%)**, and voicemail **(-28%)** declined when comparing providers who offered a telehealth option vs. those who did not.

Difference in Preferred Patient Communication Methods:
Providers with Access to Telehealth vs. Those Without Access

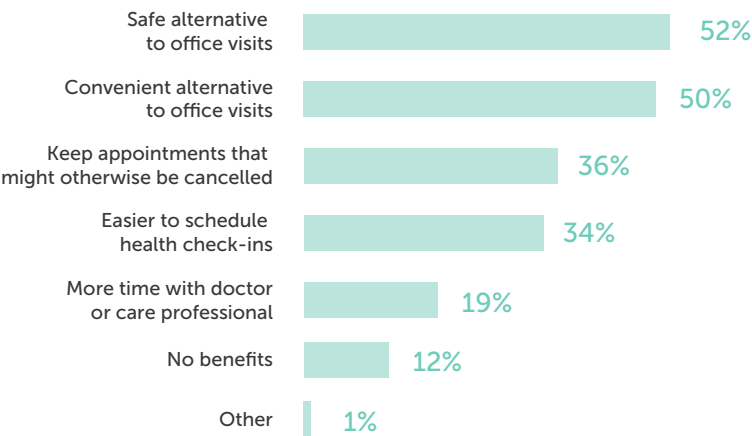


Benefits of Telehealth

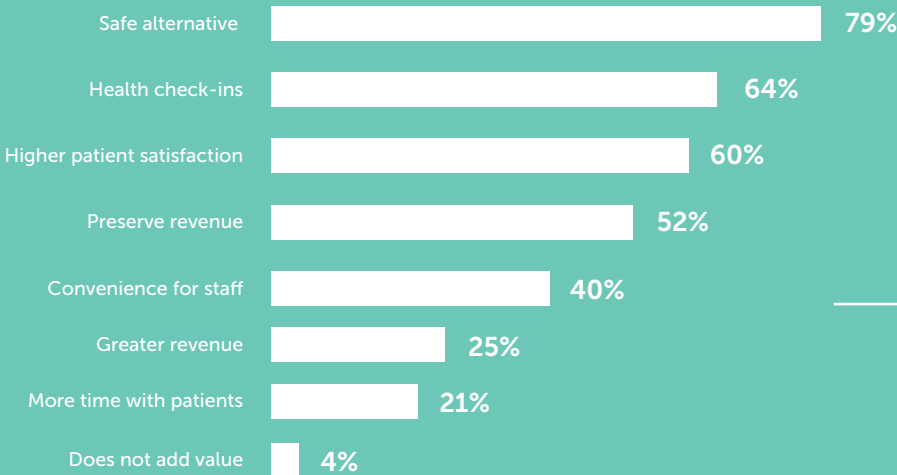
From the patient’s perspective, the top two benefits derived from telehealth are safety (52%) and convenience (50%).

While these benefits are certainly more pronounced during a pandemic, they have relevance during normal times that may extend to flu seasons as well as a preference for receiving care at home.

Most Valuable Benefits of Telehealth According to Patients



Top Benefits of Telehealth According to Providers



Overall, care professionals see more potential benefits in telehealth. A majority of clinicians (54%) believe telehealth consults are just as good or even better than in-person consultations. Fifty-nine percent (59%) also say telehealth preserves revenue from appointments that may otherwise be cancelled. This demonstrates a growing open-mindedness for new benefits and use cases.

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03

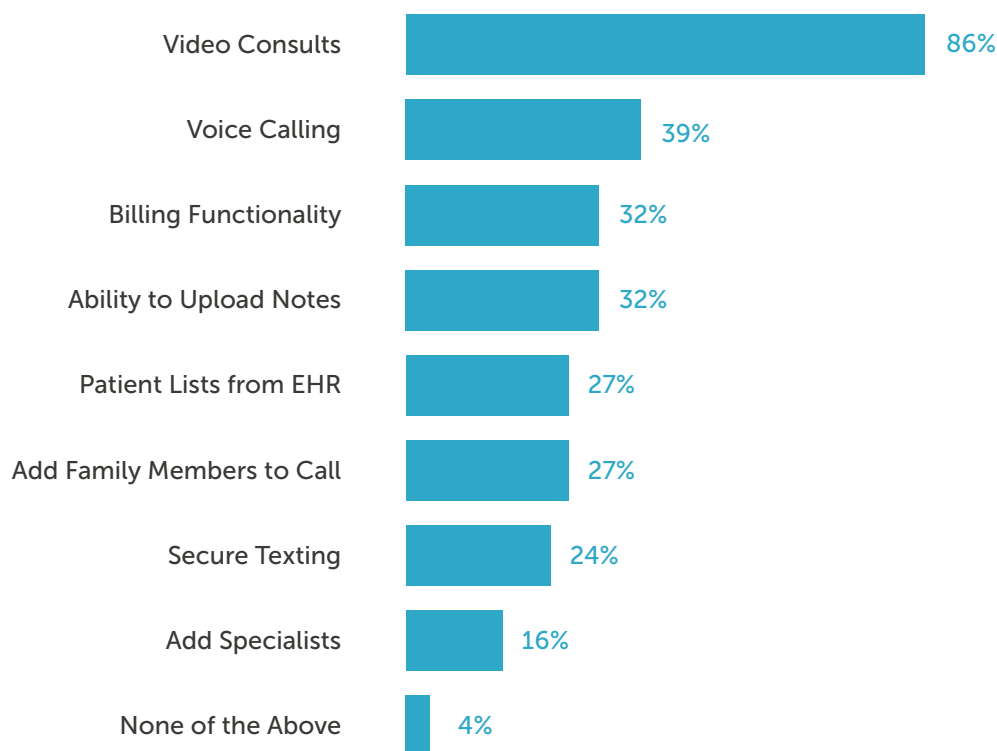
The Right Telehealth Solution
Makes a Big Difference

Current Solution Features & Functionality

The Impact of the Coronavirus

With the rapid onset of Covid-19, many hospitals quickly implemented telehealth solutions with moderate costs that could be rapidly deployed. As the dust begins to settle, organizations recognize that their needs are evolving, as reflected in the chart below.

Identified Needs for Telehealth Solution Functionality



Buyer's Tip

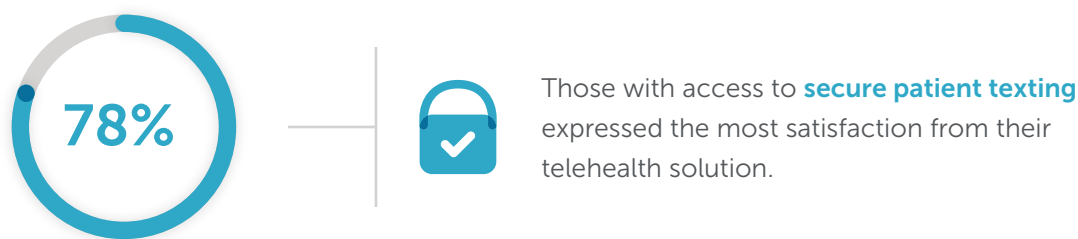
Coordinating telehealth visits often comes down to phone calls or emails. Unfortunately, **70%**¹ of adults won't answer a phone call from an unknown number, and emails are easy to miss. In contrast, **97%**² of smartphone owners text at least once a week. So while secure texting ranked low on the functionality list, it could be the sleeper feature that streamlines the coordination of video consults, particularly for automating appointment reminders and answering simple questions from patients.

¹Consumer Reports – Why Robocalls Are Even Worse Than You Thought, May 15, 2019

²Pew Research Center – U.S. Smartphone Use in 2015, April 1, 2015

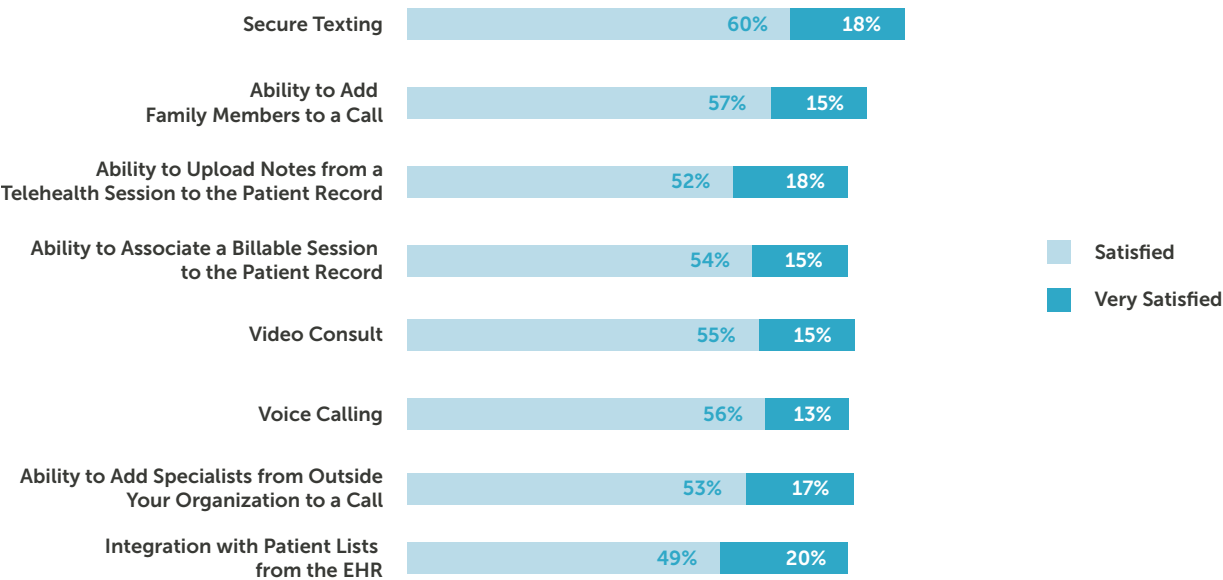
Favorable Features Impact Satisfaction

As virtual care methods grow, individuals are learning which tools most aptly meet their patient engagement needs.



Greater telehealth functionality was positively correlated with an increase in provider satisfaction. Secure messaging in particular drove the most satisfaction for respondents. In comparison, **the satisfaction with telehealth solutions regardless of the functionality included was only 65%.**

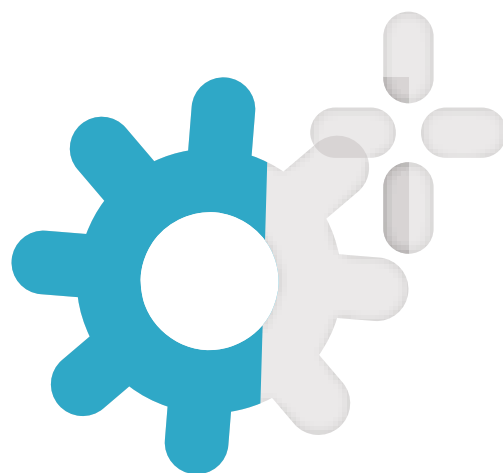
Provider Satisfaction According to Functionality Offered by Telehealth Solution



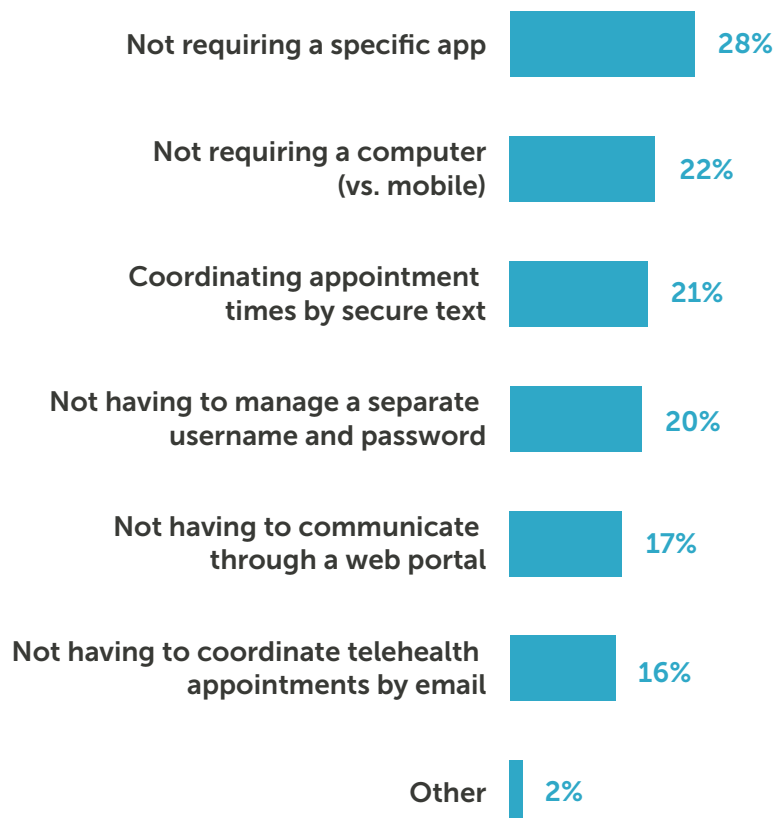
Areas for Improvement

Around **two-thirds** of patients believe that at least some improvement in telehealth is needed.

Telehealth as a whole is relatively new and has never been stress-tested at the level it has in 2020. As effective as telehealth has proven to be, respondents indicated that there is plenty of room for improvement.

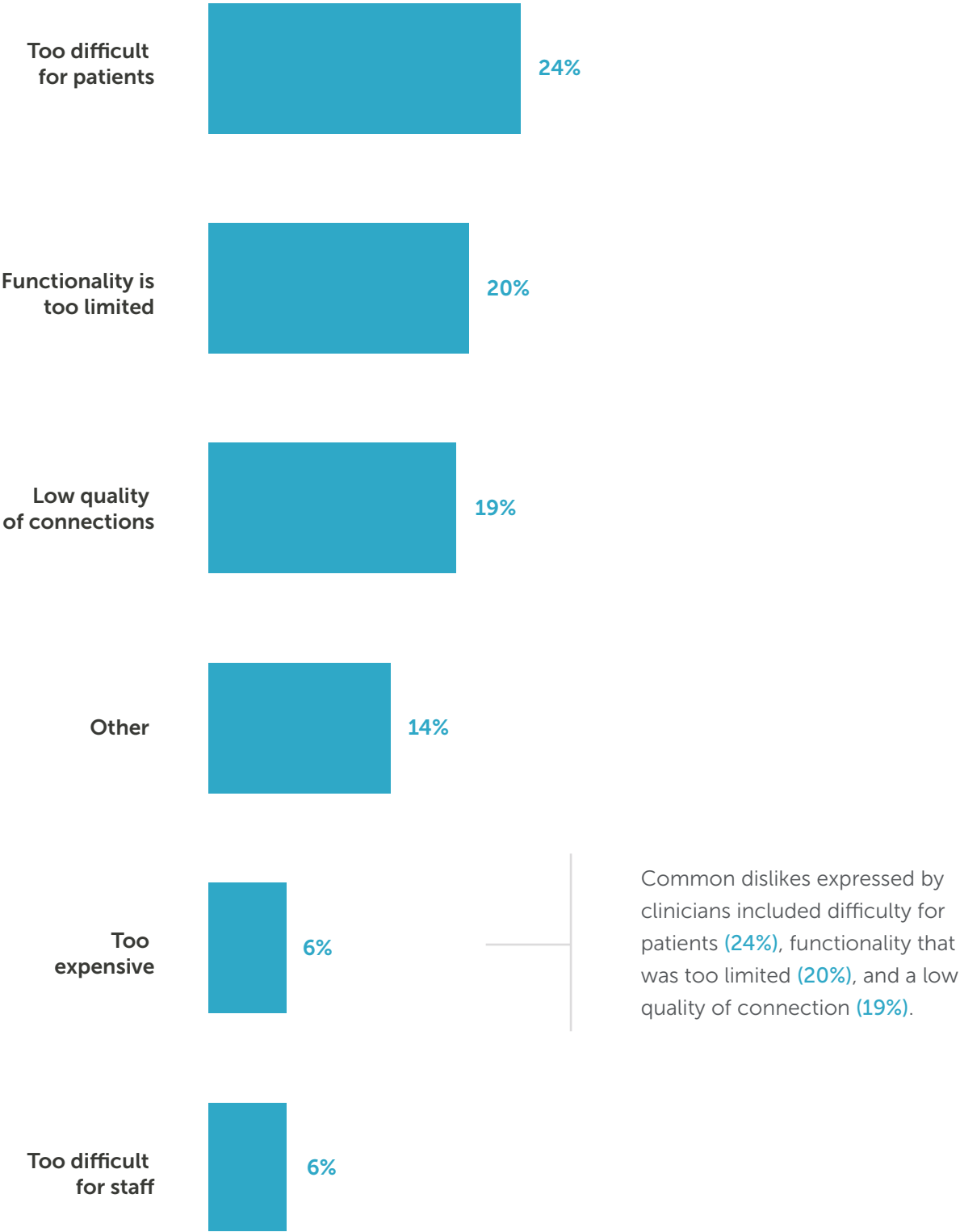


Suggestions for Improving Telehealth from the Patient Perspective



Top suggestions were tied to the **accessibility of telehealth**, including not requiring an app (28%), not requiring a desktop computer (22%), and not having to manage a username and password (20%).

Provider Dislikes of Current Telehealth Solutions



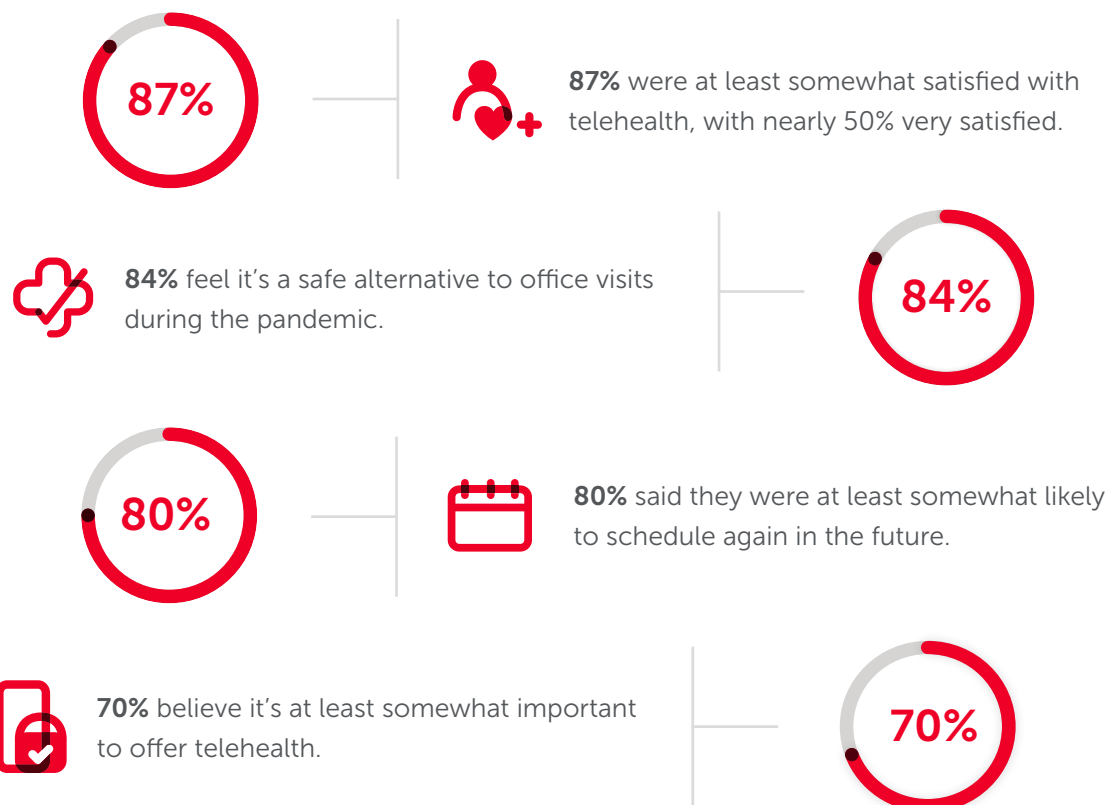
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Five Recommendations for **Expanding Telehealth**

1 | Make Telehealth a **Priority**

While the spike in telehealth usage caused by Covid-19 has waned somewhat, telehealth has established itself as a viable, permanent, and preferred channel of care. Organizations looking to make long-term investments will want to gravitate toward broader virtual care solutions offering multiple channels—**video, voice, and text**—on a single platform.

Among patients who have already embraced telehealth:



Buyer Consideration

These numbers signal an industry shift in overall patient expectations for their care, proving telehealth cannot be ignored as it continues to grow. By selecting the right vendor and creating a well thought-out plan for implementation and broad adoption, organizations improve their odds of deepening their relationships with patients, improving overall satisfaction, and optimizing incremental revenue.

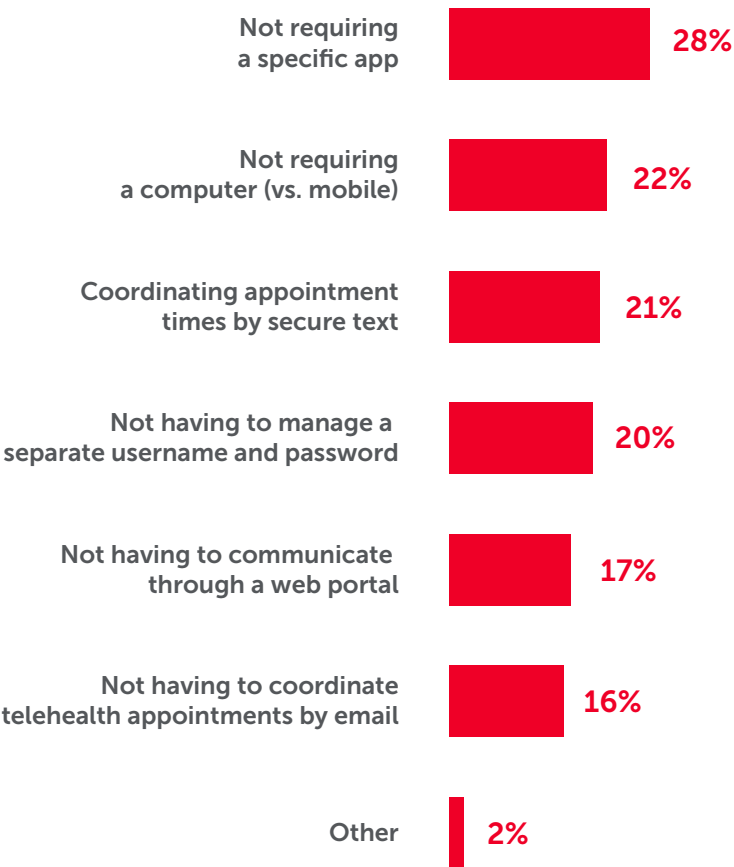
2 | Select a Platform That's Easy for Patients to Access

As technology solutions become more advanced and complex, the fight to maintain a simple, enjoyable user experience becomes increasingly important. This was evident among the **24%** of clinicians who cited difficulty for patients as a key hurdle for telehealth sessions.

A key consideration is older patients, who continue to prefer in-person visits, likely due to the learning curve and complexities that come with newer telehealth technology. Convincing this audience to embrace telehealth will hinge on making the experience easy and rewarding.

As previously noted, patients' suggestions for improvement were heavily based on the accessibility of the telehealth solutions. **Not requiring an app, not requiring a desktop computer, and not having to manage a username and password were important to patients.**

Suggestions for Improving Telehealth

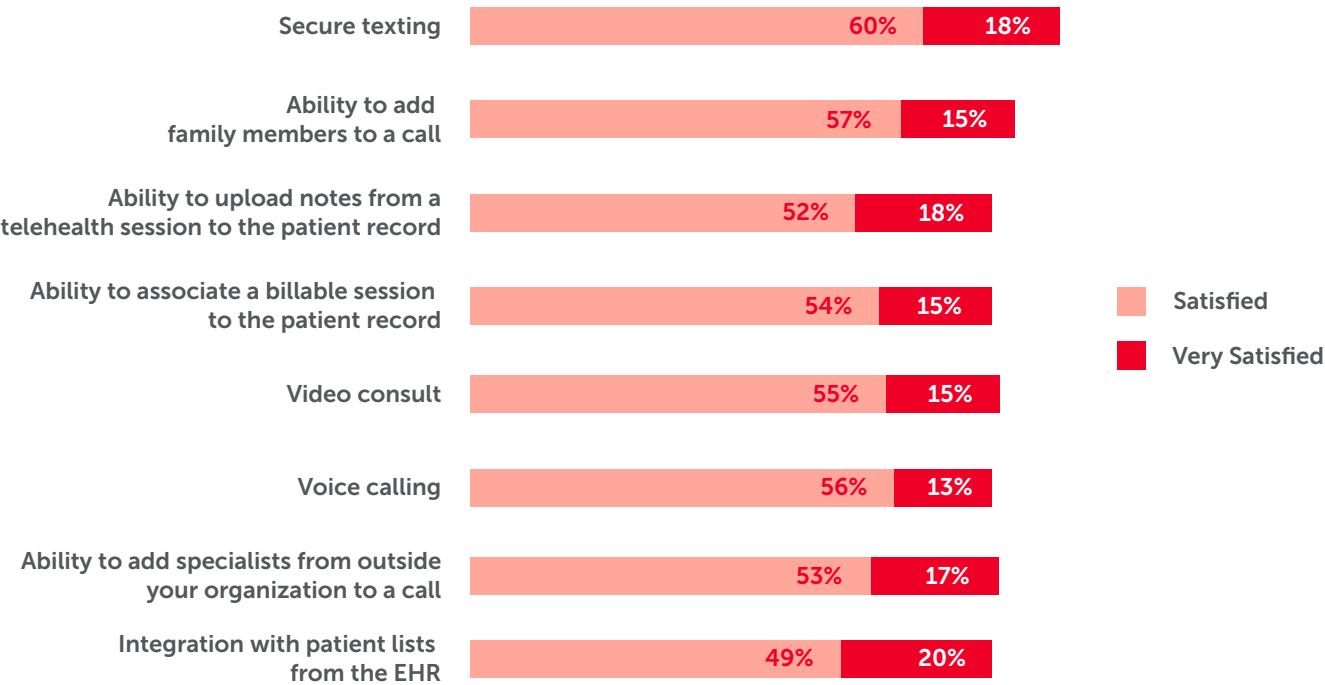


3 | Focus on **Functionality**

With fewer patients answering phone calls these days, it’s easy to understand why clinicians find greater satisfaction with telehealth solutions that incorporate secure texting. Focusing on the right features will drive more adoption, retention, and satisfaction. In short, provide the main functionality that users are looking for the most.

The ability to text patients not just with appointment reminders, but also with attachments and asynchronous two-way conversations helps staff avoid the countless interruptive calls or late evenings spent responding to an overstuffed email inbox.

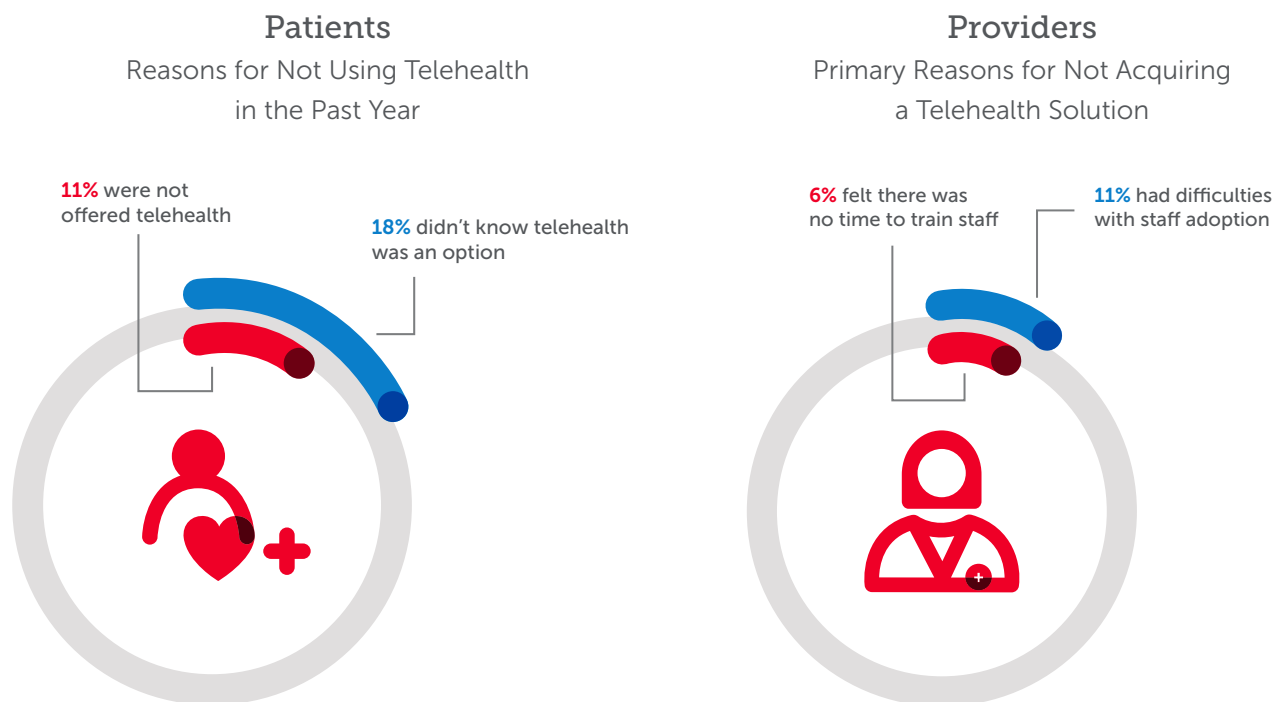
Satisfaction According to Functionality
Offered by Telehealth Solution



4 | Educate and Inform

Even as a growing number of organizations employ telehealth for their healthcare needs, many patients will not be informed about the virtual care solutions available to them. Evangelization – both externally among the patient population as well as internally among staff – will help ensure key audiences embrace your telehealth solution and drive its success.

Consider these findings when designing your internal and external communication programs:



Buyer Consideration

Consider the varying needs that exist among a diverse patient base. These can include access to smartphones or internet service, technical savvy, visual impairments, and a support network such as family members who can help set up and participate in these calls.

Solutions that remove these technology hurdles and simplify remote access stand the best chance of long-term adoption.

5 | Cost-Effective **Methods**

For a small number of clinical staff, a primary dislike of their current telehealth solution was believing it was too expensive (6%). Among those patients who listed “other” as a reason for not using telehealth, 17% manually filled out “cost” as their main dislike. Among clinicians who had not yet implemented telehealth, recall that 31% cited budget as a top concern.

For any healthcare IT project, cost will always be a concern, and telehealth is no exception. Use these tips to keep spending under control:

Consolidate vendors



Fewer vendors, fewer headaches. Narrow your list to vendors that can reliably provide the broadest virtual care collaboration capabilities – video, voice, secure text, EHR integration, billing, and more.

Go to the cloud



Scalability and speed of deployment are two compelling reasons to focus on cloud-native vendors, not to mention rapid iteration and economies of scale not possible with on-premise solutions.

EHR integration



Because access to patient lists and data is a critical requirement for telehealth to be scalable, vendors offering plug-and-play integrations with your EHR will incur lower IT costs and require few, if any, costly customization resources.

Keep it simple



Usability is key for both patients as well as clinical staff. Solutions that deliver a clean, easy-to-use experience tend to win versus more feature-rich but poorly designed apps. High adoption of a solution can translate into more billable consults among providers and fewer missed appointments for patients, not to mention greater loyalty and future revenue.

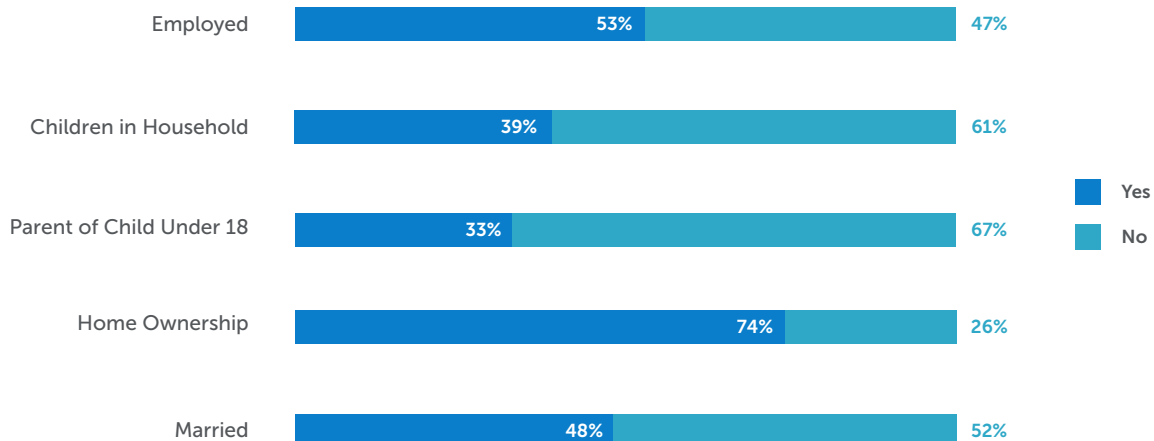
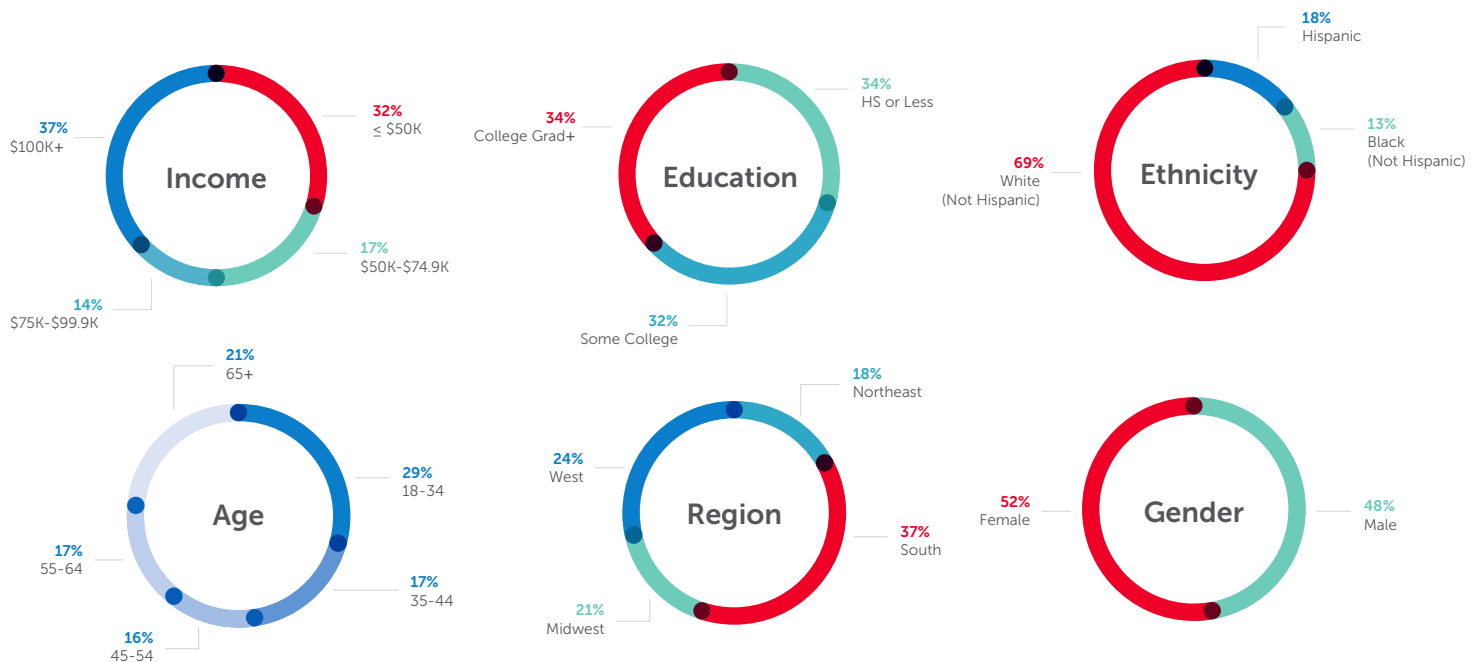
While nothing can replace an in-person patient exam, the rapid embrace of telehealth with the recent pandemic has yielded a new wave of converts both among staff and patients. We hope the data from this survey will help better inform any future buying decisions as you navigate the virtual care landscape.

Sample Characteristics & Demographics

To better understand the patient and clinician opinions surrounding telehealth and virtual care contained within this survey report, please reference the background information below.

TigerConnect and **The Harris Poll** conducted the survey from July 2020 to August 2020, incorporating the results from **over 2,500** respondents in the United States, ranging from patients to providers, regardless of experience with telehealth.

We believe the survey results offer a fair representation of the general United States population. The following demographics are representative of the patient populations of our survey.





As healthcare's most widely adopted collaboration platform, TigerConnect uniquely combines clinical communications, telehealth, patient texting, and on-call physician scheduling in a single, easy-to-use, cloud-based solution.

Trusted by more than 6,500 healthcare organizations, TigerConnect maintains 99.99% verifiable uptime and nearly 5 billion user sessions each year.

Contact Us

To schedule a demo and learn more about how TigerConnect can improve care team collaboration and patient engagement for your organization, contact us or visit our website www.tigerconnect.com.

