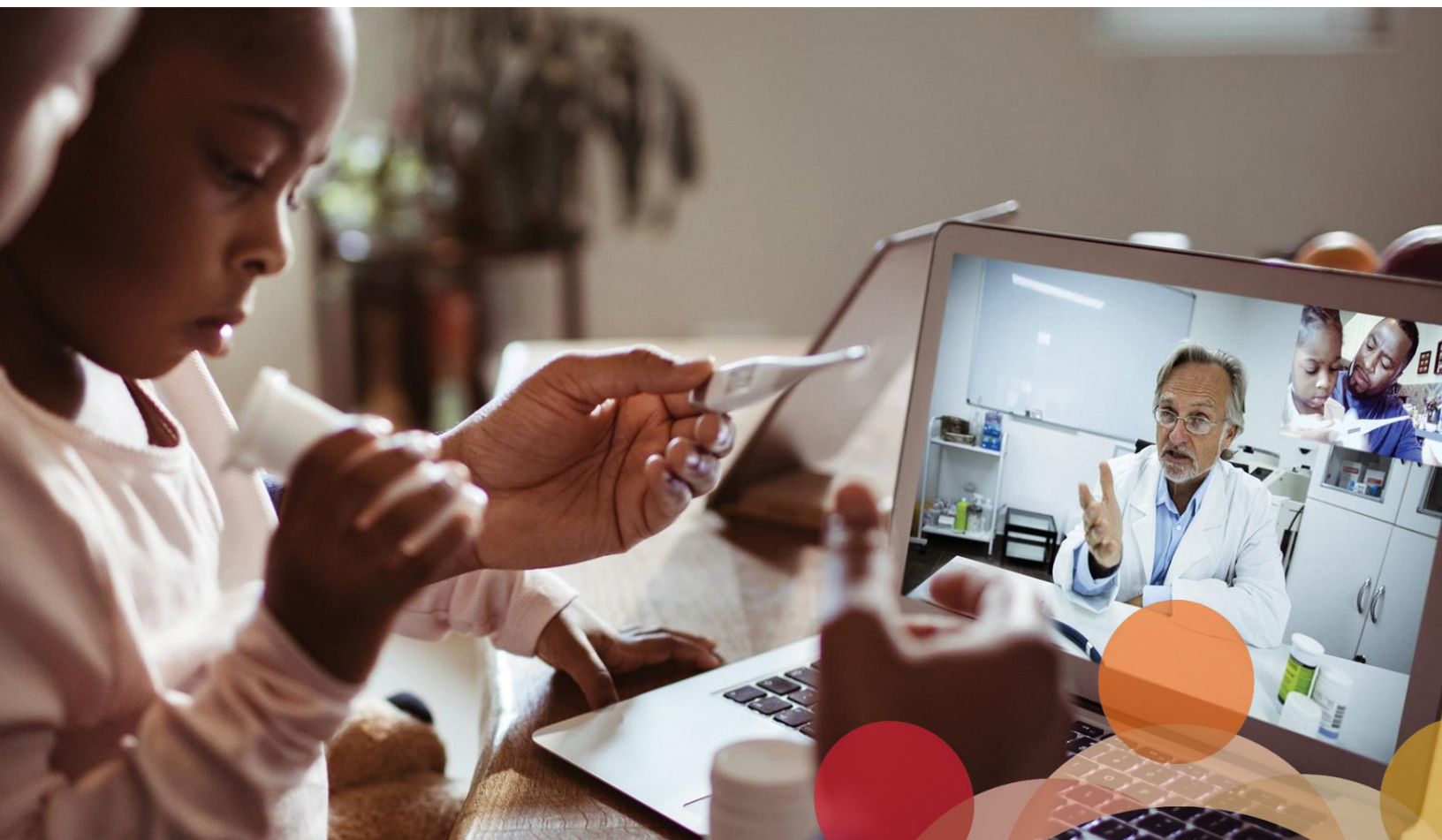


# TELEHEALTH

A Patient's Perspective



POPULUS

2022

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## Background & Objectives

In September 2022, Populus conducted a study of patients' perspectives on telehealth based upon a population of approximately 50,000 patients.

All of the patients surveyed had participated in a telehealth session through the Populus Custom Care platform within the past 12 months.

The questionnaire consisted of 14 questions which took less than 2 minutes to complete.

The following analyses examine Populus' patient membership using its telemedicine tools.



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## Executive Summary

Patients are taking more ownership of their healthcare than ever before and while the pandemic put a spotlight and accelerated the adoption of telehealth, it is clearly here to stay. Even post pandemic, most of the patients have regular physicians that they see, yet they overwhelmingly prefer the telehealth experience over traditional care. They would however, use both depending on the circumstance.

From a financial perspective, the majority of patients report that the cost of a telehealth experience is either the same or actually less than their traditional care appointments.

Ease of use and convenience are the biggest reasons for the use of telehealth by patients, with only 11% of them feeling that concerns over COVID plays a role in their decision.

Diagnosing a condition does not rank in the top three reasons that people have chosen to use telehealth. Obtaining a specific prescription is the number one reason, followed by follow-up to an existing condition, and learning more about their condition as the most significant reasons.

When asked what pharmaceutical companies could do to provide added benefit to their experience, most patients suggested that they provide a way to find out more information, followed by providing educational content and physician discussion guides.

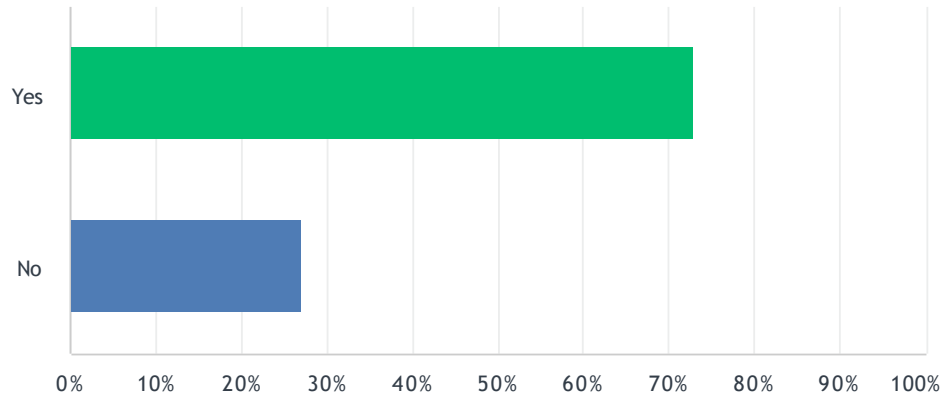


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## Patients Who Have a Regular Doctor

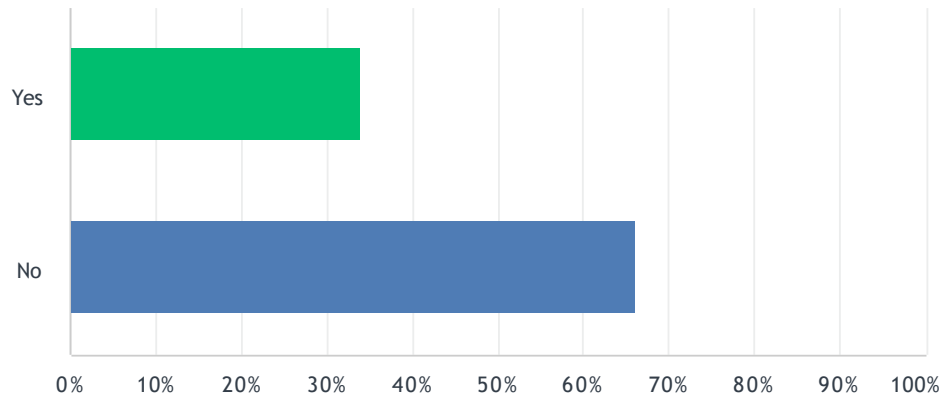


Patients are willing to utilize telehealth based upon their needs regardless of whether it is with their regular physician or with a physician via telehealth who is not their regular physician.

- 73% of patients have a regular physician however still chose to use telehealth without their regular physician
- 27% of patients do not have a regular physician and rely on telehealth as a primary means of care



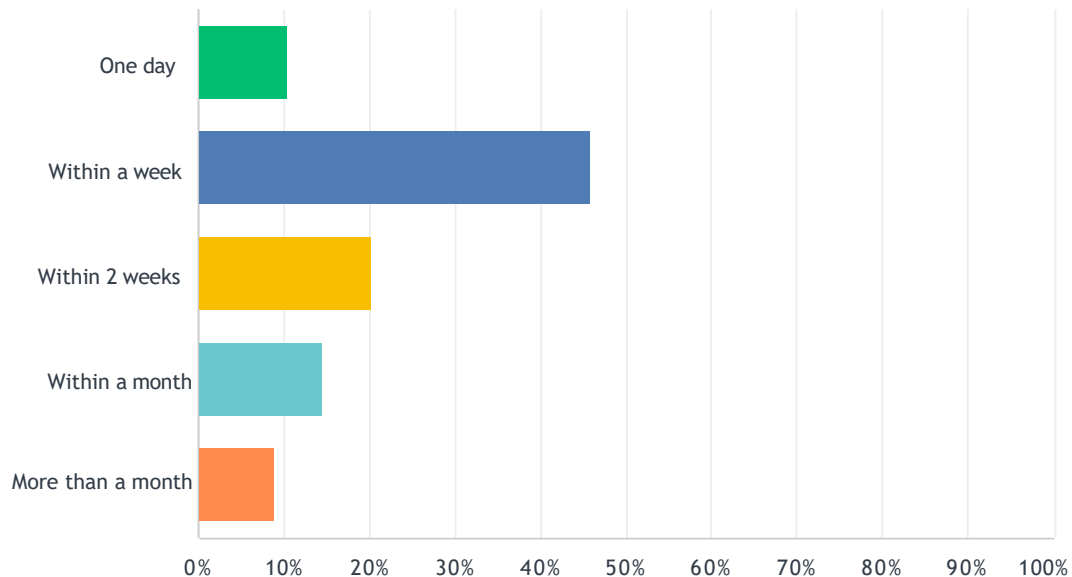
## First Experience with Telehealth



Patients are willing to utilize telehealth based upon their needs regardless of whether it is with their regular physician or with a physician via telehealth who is not their regular physician.

- 66% of patients have experienced telehealth in the past
- 34% of patients utilized the platform as their first ever telehealth experience

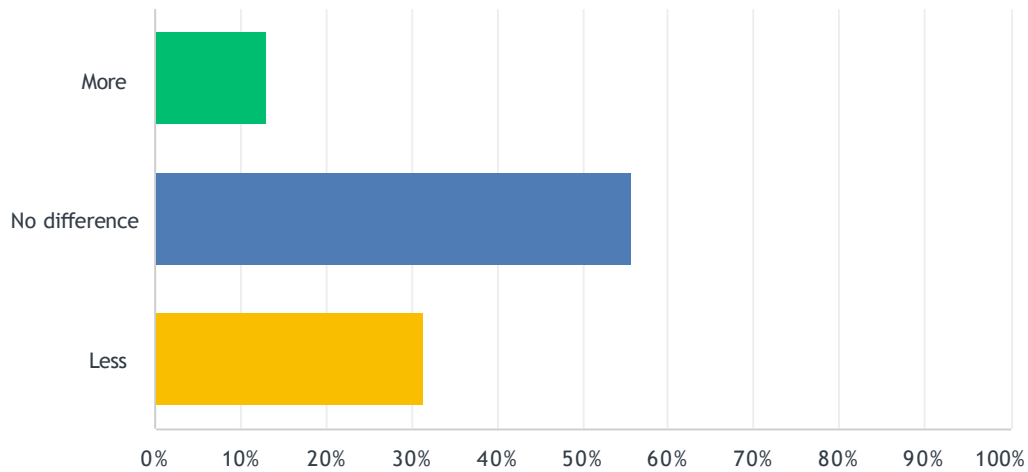
## How Quickly Patients Can Get an In-Person Appointment to Have a Specific Drug Prescribed



Patients have indicated that one of the primary reasons for utilizing telehealth is to obtain more information about a specific drug and to obtain a prescription for it. Through traditional care, it can take a significant amount of time to accomplish their goal.

- Almost half of patients (45%) feel that it can take from over two weeks to over a month to get an in-person appointment to have a specific drug prescribed
- Only 10% can get an in-person appointment within a day

## Cost of Virtual Care vs. Traditional Care



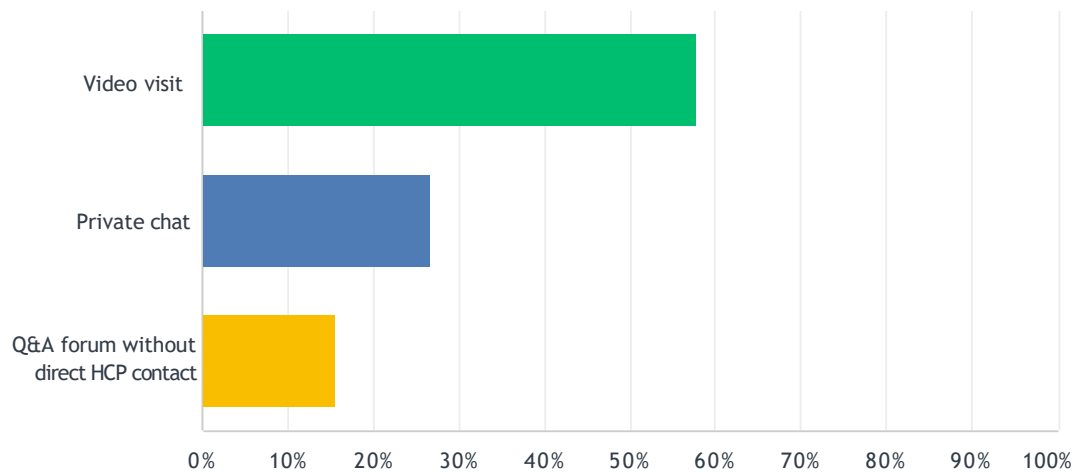
From a financial perspective, the majority of patients report that the cost of a telehealth experience is either the same or actually less than their traditional care appointments.

- Only 13% of patients feel that a telehealth consult costs more than their traditional care
- While 56% feel that there is no difference,
- 31% feel that it costs less





## Consult Modality

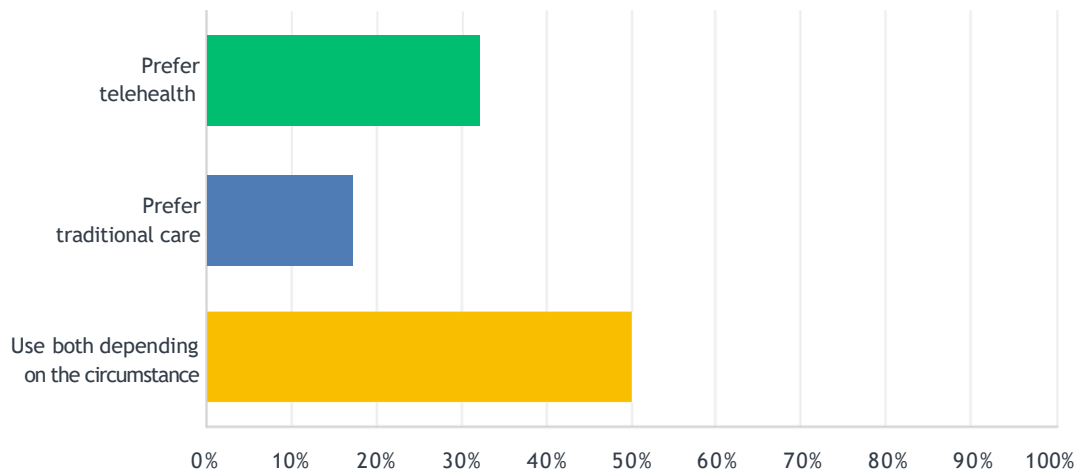


While there are a large number of different ways to conduct a telehealth consultation, the primary modalities are video, private chat and question and answer forums.

- A majority (58%) of patients utilize video for their telehealth consults
- The second most popular was private chat at 27%
- Q&A Forums were the third most popular at 15%



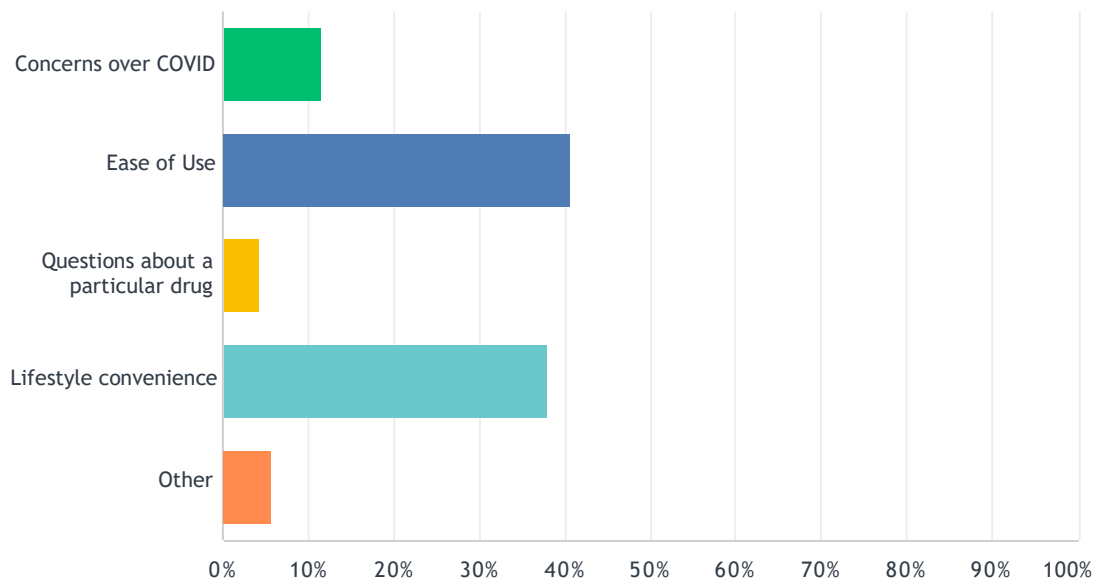
## Preference of Telehealth vs. Traditional Care



Even post pandemic, most of the patients have regular physicians that they see, yet they overwhelmingly prefer the telehealth experience over traditional care. Most patients do feel that they would use both depending on the circumstance.

- Almost twice as many people prefer telehealth to traditional care
- However 51% would use both depending on the circumstance

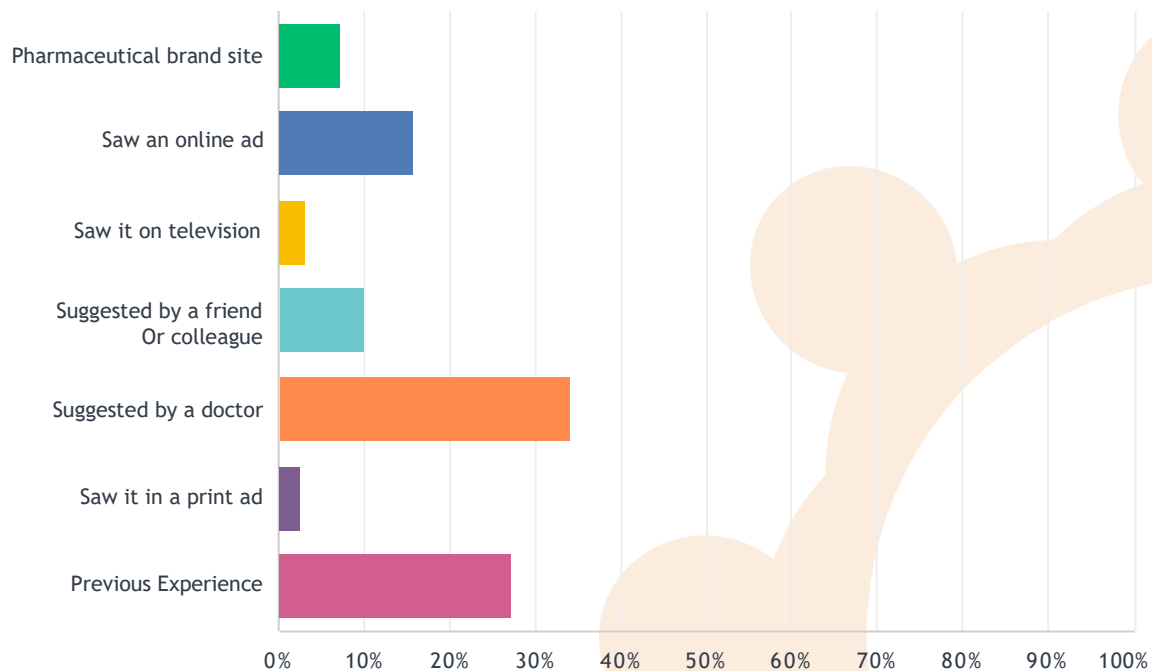
## Reasons for Choosing Telehealth



While the pandemic put a spotlight and accelerated the adoption of telehealth, it is clearly here to stay. Patients no longer think of it as a primary reason that they utilize telehealth.

- Only 12% of people cited concerns over COVID as being a driver for choosing telehealth
- Ease of use (41%) narrowly edged out lifestyle convenience (38%) as the number one reason for choosing telehealth

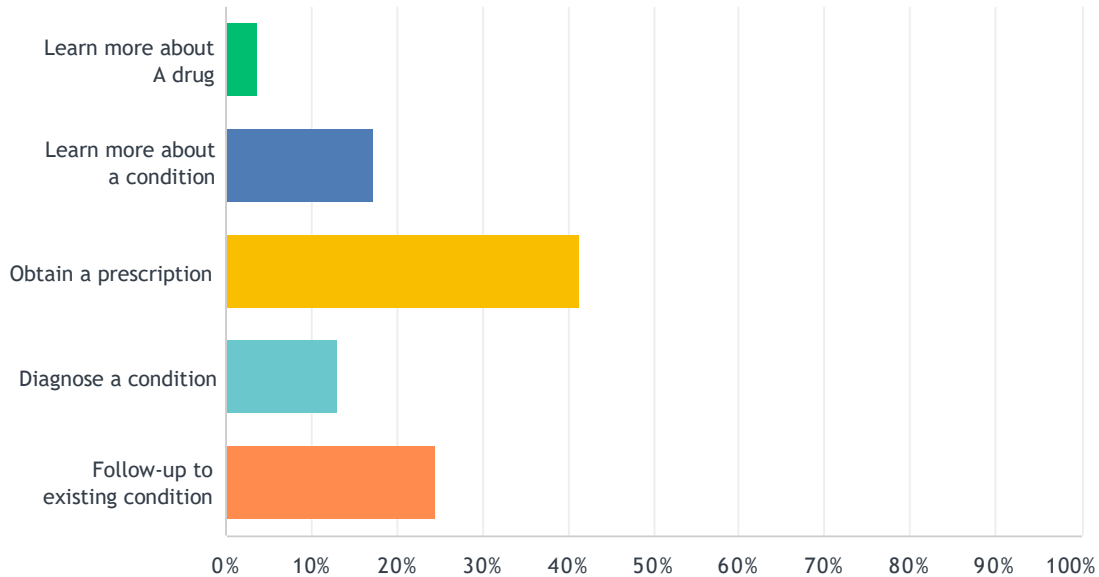
## How Introduced to Telehealth



With marketers becoming more savvy at connecting to patients through telehealth, patients are exposed to the opportunity based upon their search for more information about their condition.

- People predominantly were introduced to telehealth by a physician recommendation or through previous experience
- The next largest factor was through an online ad, which made up about 15% of the patient population

## Main Purpose of Telehealth Consult

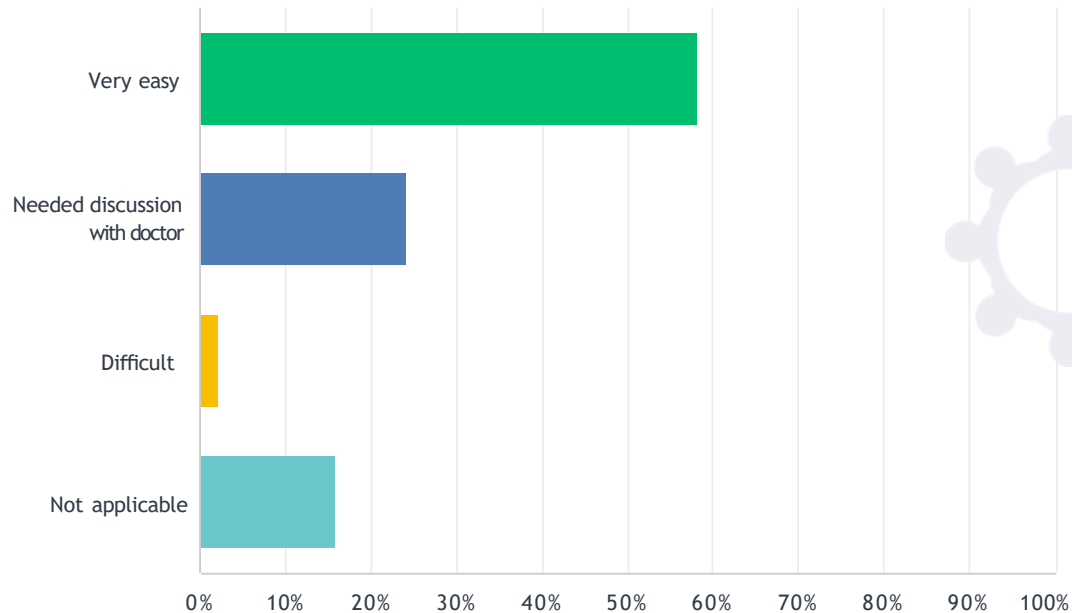


Diagnosing a condition does not rank in the top three reasons that people have chosen to use telehealth. Obtaining a specific prescription is the number one reason, followed by follow-up to an existing condition, and learning more about their condition as the most significant reasons.

- Obtaining a specific prescription was the overwhelmingly largest reason for people's purpose for the telehealth consult at 41% of the patient base
- Diagnosing a condition was significantly low at only 13%
- 17% wanted to learn more about a condition and 27% were following up on an existing condition



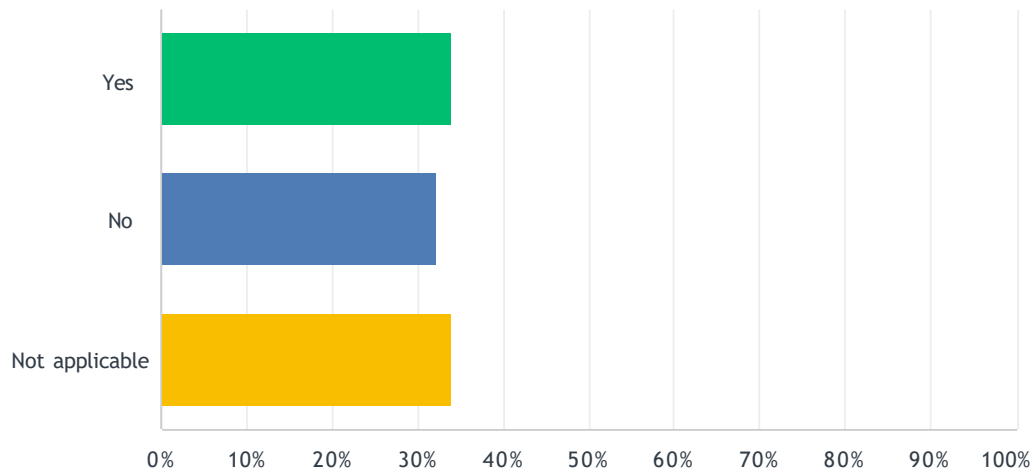
## Ease of Obtaining Prescription



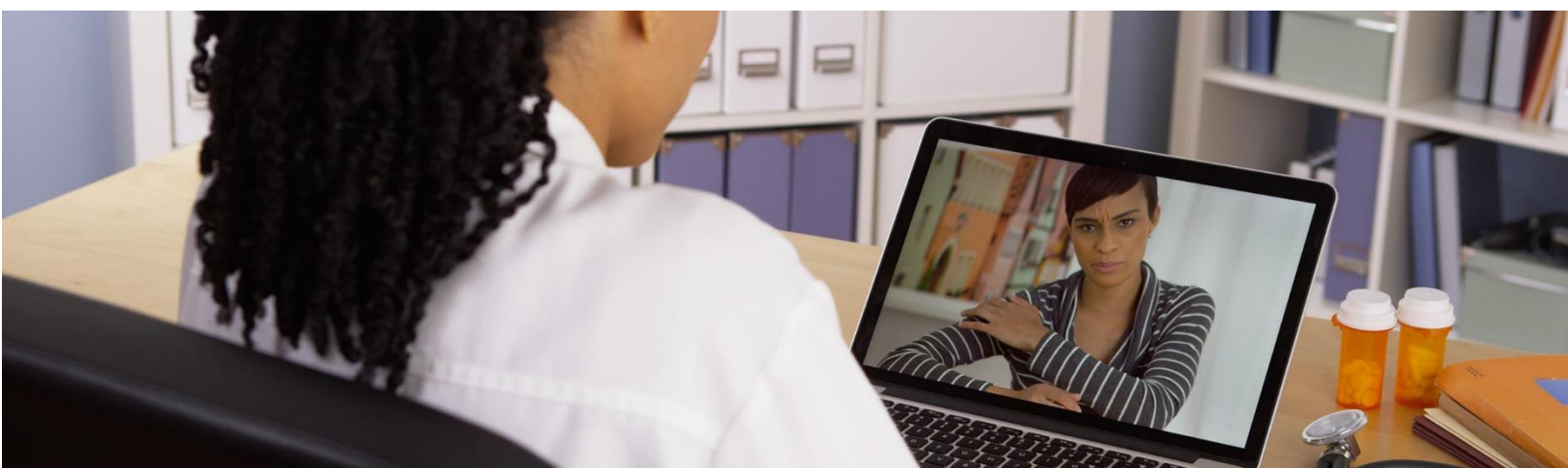
Obtaining a specific prescription is a primary reason that people find telehealth to be a preferred way of managing their own healthcare. The ease of obtaining that prescription is paramount to their consideration.

- 58% of the audience found it very easy to obtain the prescription that they were looking for
- 24% needed to have more conversation with the doctor
- Only 3% of the audience found it difficult to obtain the prescription they were seeking

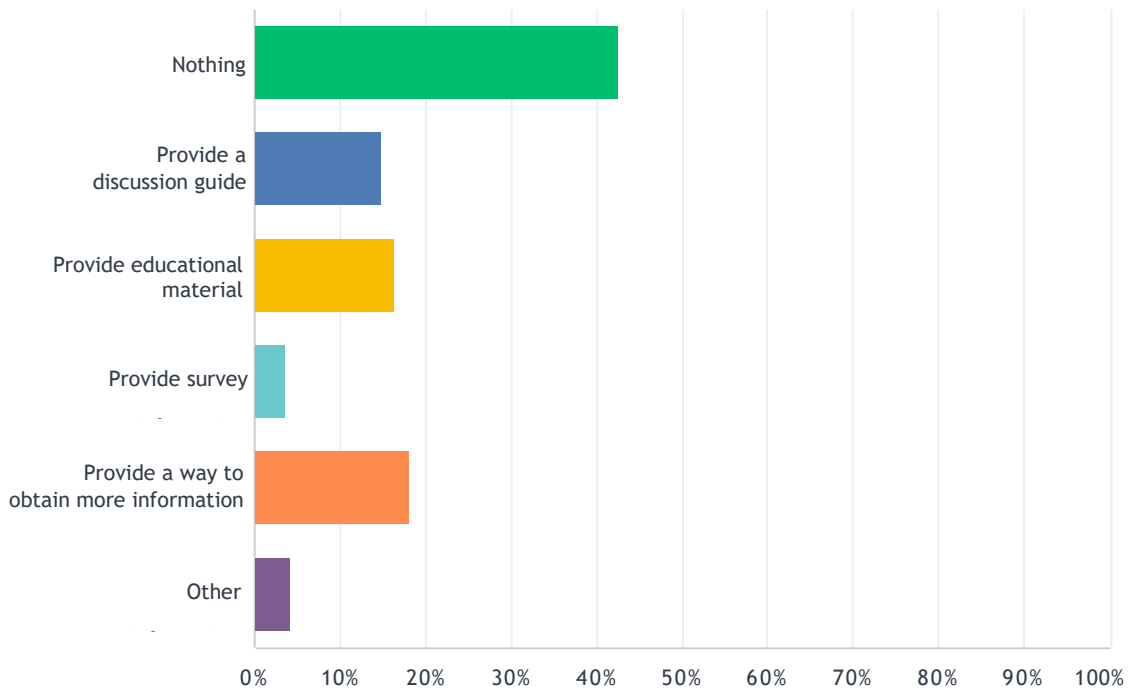
## Would The Prescription Be Prescribed in Traditional Care instead of Virtual



Amongst people who were being prescribed a treatment, it was pretty evenly split between people who felt that they would receive the prescription regardless of whether they received virtual or in-person care



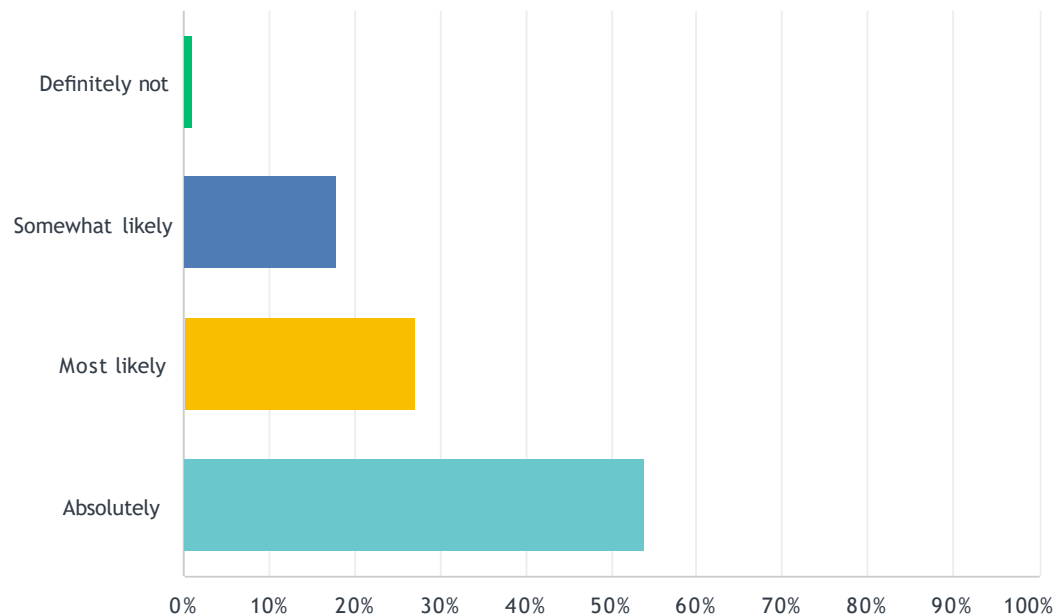
## What Could Pharmaceutical Companies Do To Improve the Experience?



With the amount of exposure to specific patient types available to pharmaceutical companies, there is an obvious opportunity to provide additional support to patients throughout their healthcare experience.

When asked what pharmaceutical companies could do to provide added benefit to their experience, most patients suggested that they provide a way to find out more information, followed by providing educational content and physician discussion guides.

## Likelihood To Use Telehealth Again



- Telehealth is here to stay. People overwhelmingly felt that they would either most likely or absolutely use telehealth again at 81%.
- Only 2% felt that they would definitely not use it again in the future



## Recommendations for pharma marketers:

- Engage meaningfully with patients within the virtual care environment to support their conversations with their doctor and to empower them to take an active role in decisions about their care
- Consider developing strategies to help drive the patient's conversation with their physician at the moment they are most interested in learning more about their condition
- Leverage content that is specific and customized to the modality of the telehealth consult that the patient is experiencing
- Recognize that patients are actively seeking additional information from brands about the conditions that they are suffering from.
- Help simplify the process for a patient to engage with a physician in order to save them time and frustration
- Provide discussion guides within the context of rich media ad banners in telehealth consults in order to help a patient prepare and manage their virtual consultation



## About Populus

**POPULUS** is the first company to focus on marketing within virtual care. The company provides a media and virtual patient acquisition platform leveraging telehealth. Populus curates a deep archive of condition-specific content for timely delivery to patients before and after their virtual care visit which is sponsored by major healthcare brands.

The company's goal is to leverage technologies to understand HCPs and consumers in order to deliver **personalized healthcare solutions** and **improve lives**.

Populus is a team that's passionate about constantly raising the bar and improving the lives of all those they touch: **from clients and their patients, to the company's employees and the larger community.**

**POPULUS provides pharmaceutical brands and their agencies with the only way to:**

Guarantee ROI by delivering patient acquisition and verified prescriptions.

Reach a captive audience as they wait for their scheduled or on-demand virtual doctors' visits.



POPULUS





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