

Global Insights into the Video-Enabled Virtual Care Experience

Understanding Patient and Provider Expectations

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logitech



SPEAKERS



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AGENDA

1

GLOBAL TRENDS IN VIRTUAL CARE

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GLOBAL VIRTUAL CARE EXPERIENCE STUDY FINDINGS

- Telehealth usage
- Care types and locations
- Experience (Overall, Technical, Video)
- Provider technologies deployed today

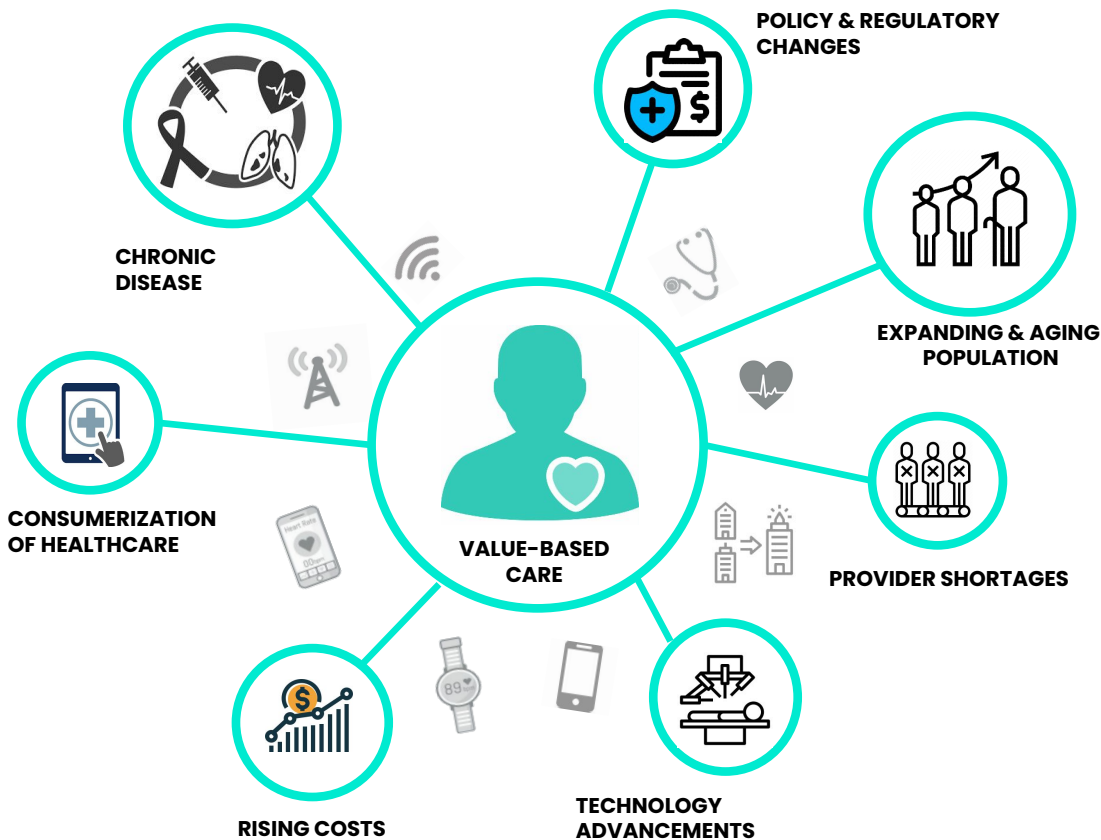
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Q&A

GLOBAL TRENDS IN VIRTUAL CARE



An industry facing many challenges

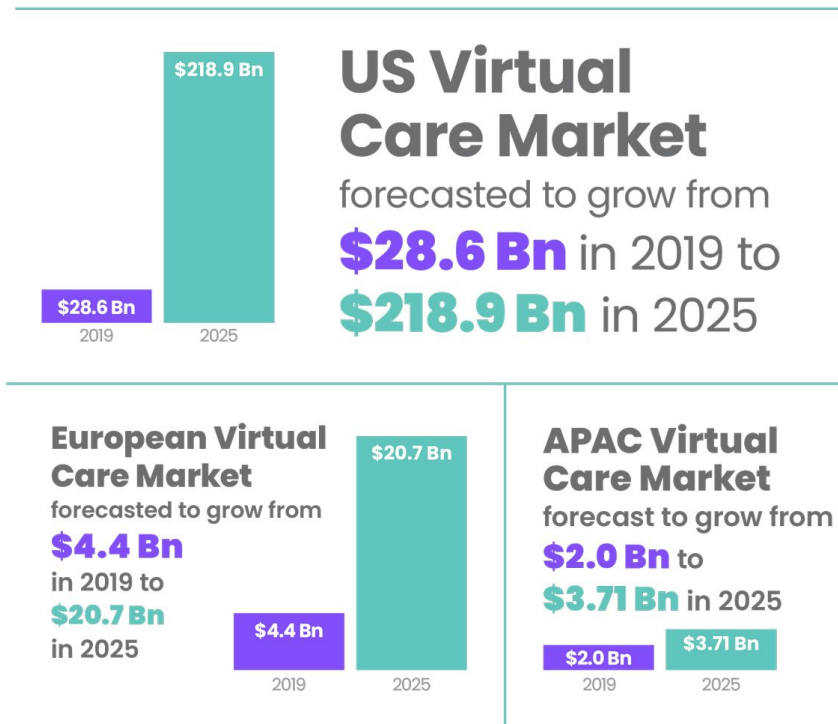


DRAMATIC GROWTH IN VIRTUAL CARE

Virtual care catapults into the forefront with the pandemic as the primary driver

Pandemic will subside, but most recent indicators continue to show **astronomical growth figures**

Will largely be driven by high-quality, **video-based care** interactions



ACHIEVING HEALTH EQUITY

Bridging Gaps in Care Delivery



GLOBAL VIRTUAL CARE EXPERIENCE STUDY



OBJECTIVES & METHODOLOGY

OBJECTIVES

Measure the current video-based telehealth sentiment amongst both healthcare practitioners (HCPs) and patients to uncover benefits and pain points

METHODOLOGY

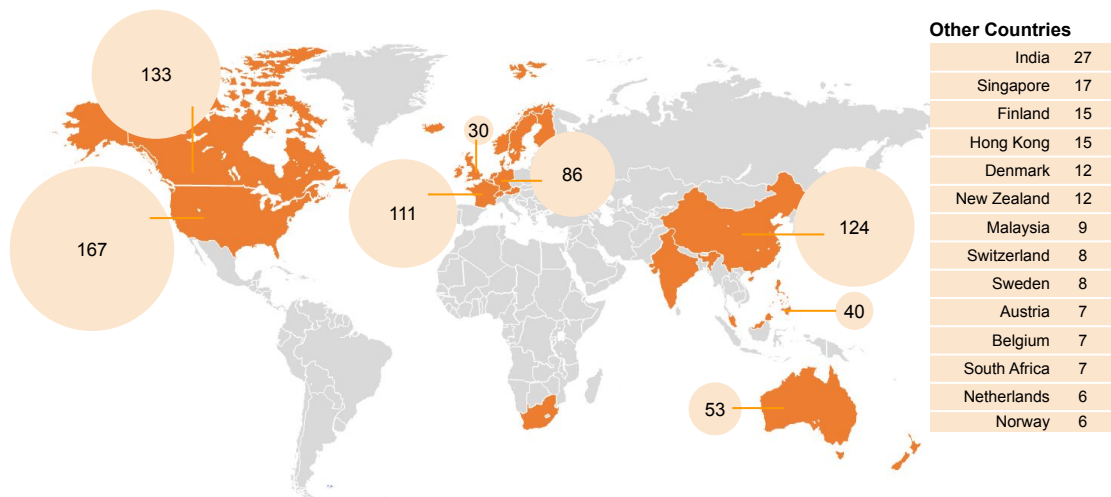
- 12 minute online survey utilizing panel sample
- International survey targeting select countries in North America (NA), Europe/Middle East/Africa (EMEA), and Asia-Pacific (APAC)
- The survey received the following numbers of responses:
 - Patients: n=754 (NA: n=250, EMEA: n=253, APAC: n=251)
 - HCPs: n=146 (NA: n=50, EMEA: n=50, APAC: n=46)
- Fielded between July 8, 2021 and August 11, 2021

QUALIFIED RESPONDENTS

- To qualify as a Patient:
 - Age 18+
 - Have a video-based telehealth visit in P12M
 - Industry screener (no marketing, advertising, research, PR)
- To qualify as an HCP:
 - Physician, PA, NP
 - Does not practice in independent practice
 - Currently sees patients using video-based telehealth

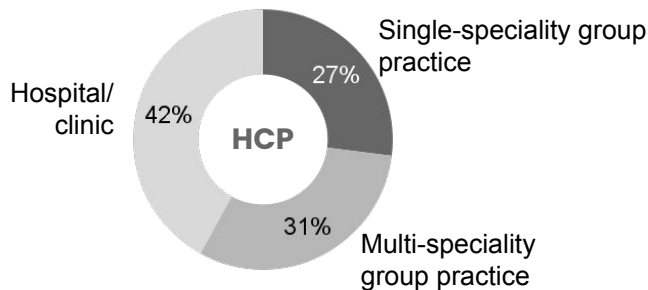
RESPONDENT DEMOGRAPHICS & FIRMOGRAPHICS

COUNTRY

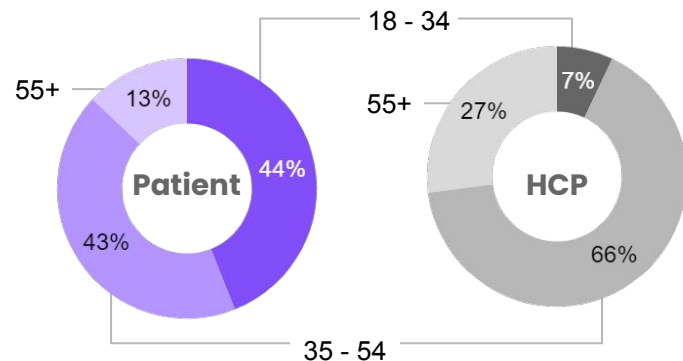


Top HCP Specializations:

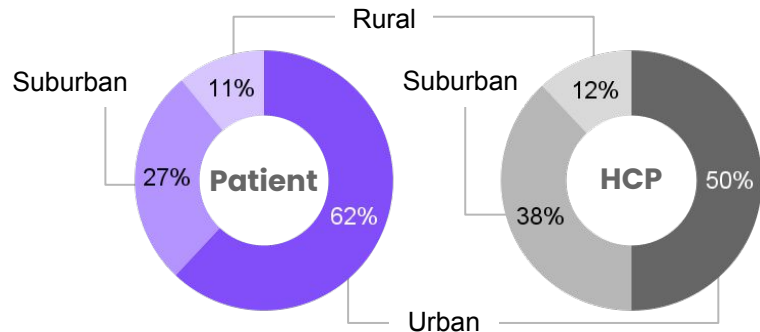
- General/Family practice
- Psychiatry
- Internal medicine



AGE



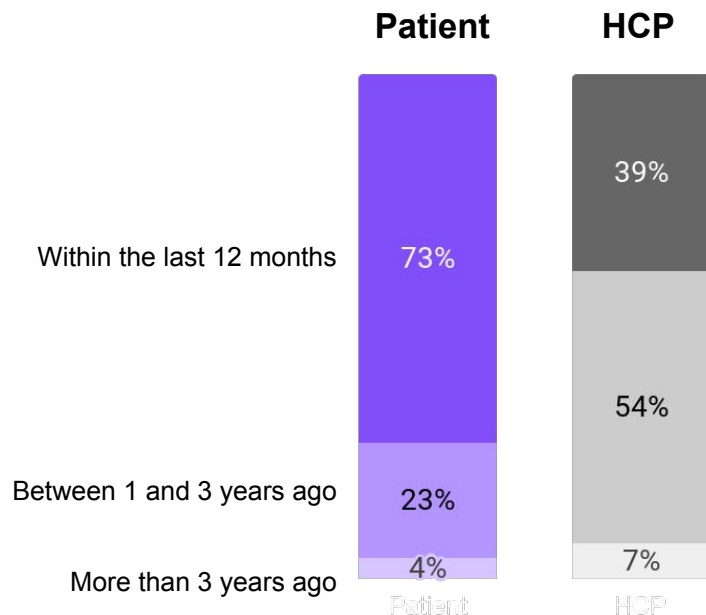
URBANICITY



TELEHEALTH USAGE

TELEHEALTH'S ACCELERATION DUE TO COVID

TIMING OF FIRST VIDEO-BASED TELEHEALTH EXPERIENCE



Telehealth is a recent trend

Less than 1 in 10 patients and HCPs were using video-based telehealth over three years ago.

Telehealth demand has accelerated due to COVID

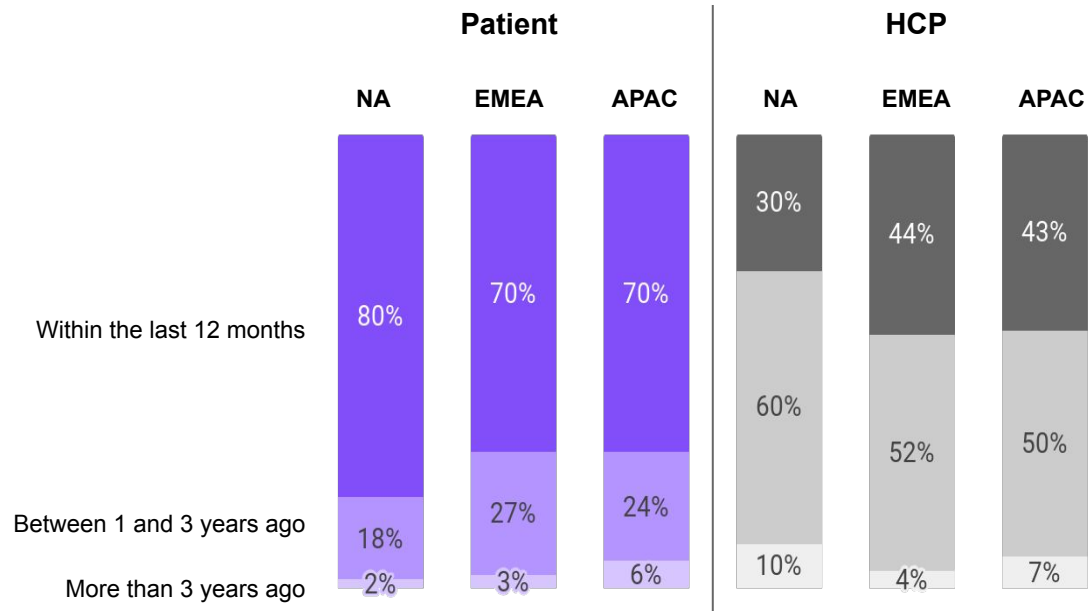
Over 70% of patients had their first video-based telehealth appointment within the past year.

Patients are much newer to video-based telehealth

HCPs are at least twice as likely as patients to have had visits between one and three years ago.

REGIONAL DIFFERENCES EXIST AND LIKELY RELATE TO POLICIES

TIMING OF FIRST VIDEO-BASED TELEHEALTH EXPERIENCE



Regional differences exist

NA HCPs have more prior experience with video-based telehealth. EMEA and APAC patients also have more prior experience.

Differences are likely related to each country's healthcare policies

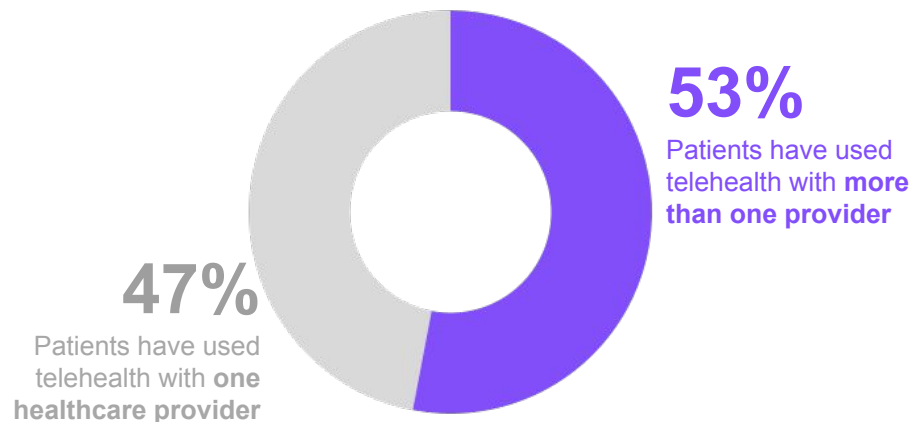
Frontiers report found varying approaches to telehealth before and after COVID-19. Differences in national healthcare also likely play a role.

BOTH PATIENTS AND HCPs HAVE ADJUSTED TO TELEHEALTH

Over half of patients have used telehealth with multiple HCPs; HCPs report 20% of visits being telehealth

NUMBER OF TELEHEALTH PROVIDERS USED FOR VISITS

Amongst Patients Only



HCP TELEHEALTH EXPERIENCE

Amongst HCPs Only

1 in 5

Patient visits in the past year have been conducted using video-based telehealth according to HCPs

5.5

Average number of care types that HCPs are treating with telehealth

5 in 10

Doctors have used alternative settings (not home or office) to conduct care

Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q7. Have you seen more than one healthcare provider using video-based telehealth?

Q8. In the past year, what percentage of your patient visits have been conducted using video-based telehealth?

Q4. What type(s) of care have you received / delivered through video-based telehealth?

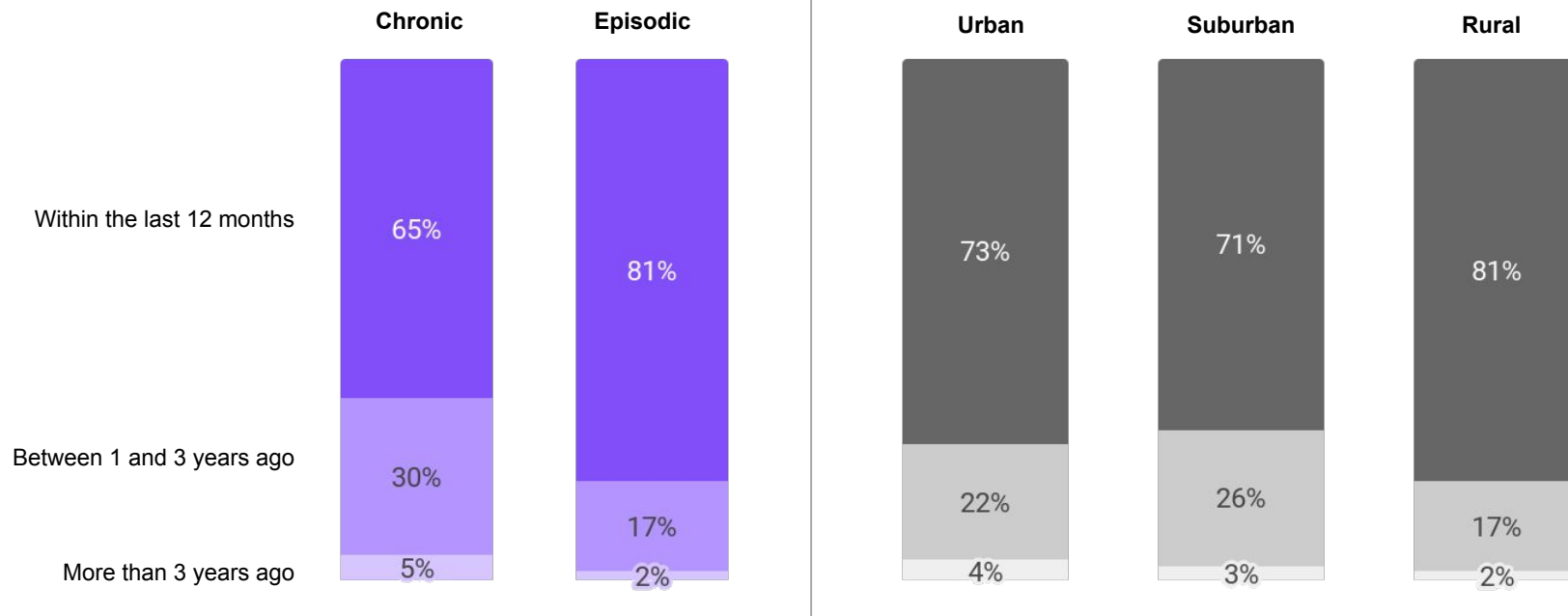
Q1. In which of these settings have you had / conducted video-based telehealth visits?

TELEHEALTH HAS **BROADENED ACCESS** TO CARE FOR PATIENTS

Episodic and Rural Patients are more likely to have more recent experiences with telehealth

TIMING OF FIRST VIDEO-BASED TELEHEALTH EXPERIENCE

Amongst Patients Only



Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q0. When was the first time you had / conducted a video-based telehealth visit?

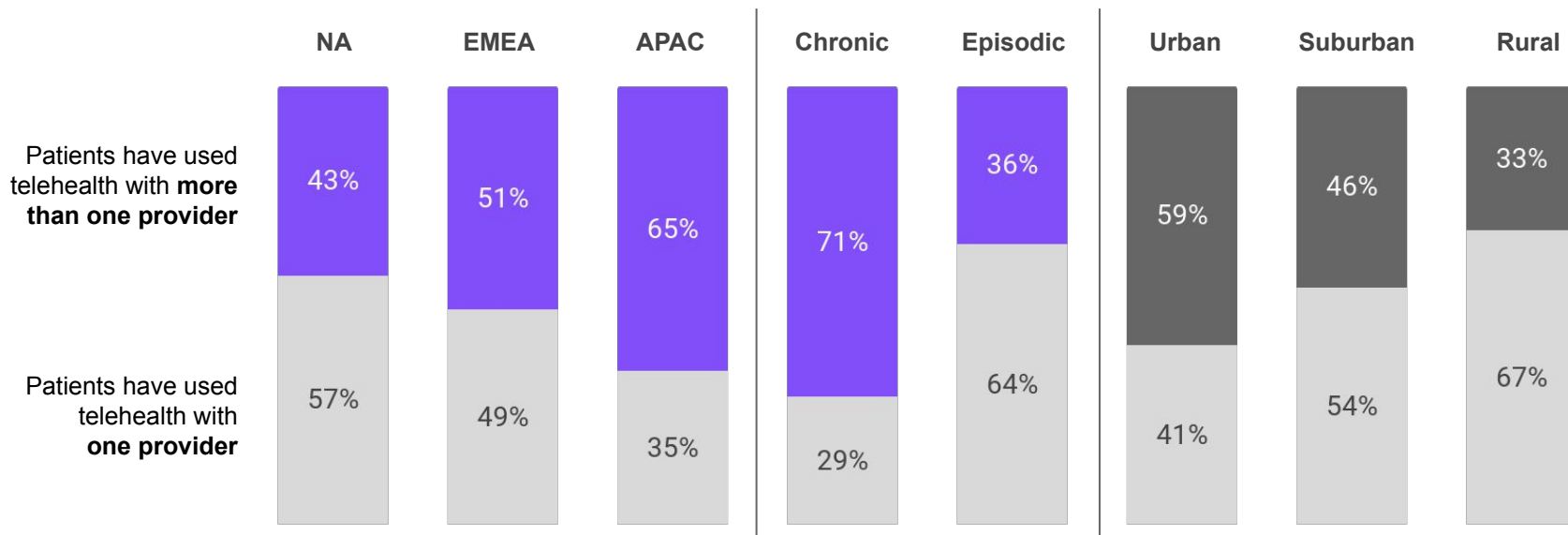
Episodic are those that primarily use video-based telehealth "for occasional or one-off health issues or problems" and Chronic are those who primarily use "on a regular basis for ongoing healthcare." This is defined by Q3.

CERTAIN SEGMENTS ARE ENGAGING MORE WITH TELEHEALTH

APAC, Chronic, and Urban Patients are all more likely to have used telehealth with multiple providers

NUMBER OF TELEHEALTH PROVIDERS USED FOR VISITS

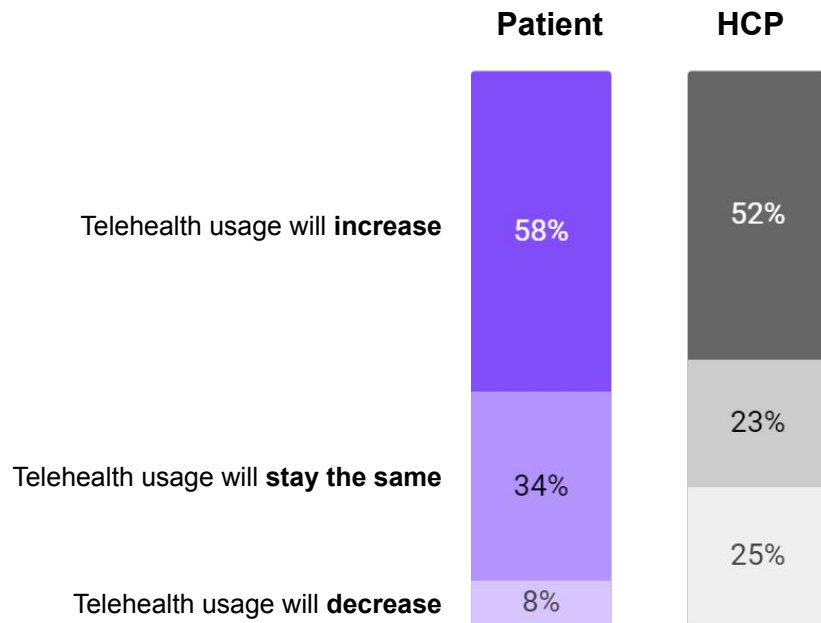
Amongst Patients Only



MAJORITY, ESPECIALLY PATIENTS, FEEL TELEHEALTH WILL INCREASE

While some think COVID-19 will drive the increase, many value the added simplicity and convenience

PERCEIVED FUTURE USAGE OF TELEHEALTH



Over 1 in 5

23% of Patients and 29% of HCP feel that COVID-19 will drive future increase in telehealth

Over 3 in 10

47% of Patients and 36% of HCP cite simplicity and convenience as a reason for telehealth increasing

Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q14. To what extent do you anticipate your use of video-based telehealth visits to change in the next year? Do you think it will...? Increase is defined as "Significantly / Slightly Increase." Decrease is "Significantly / Slightly Decrease."

Q15b. For what reason(s) do you anticipate increasing your use of video-based telehealth visits?

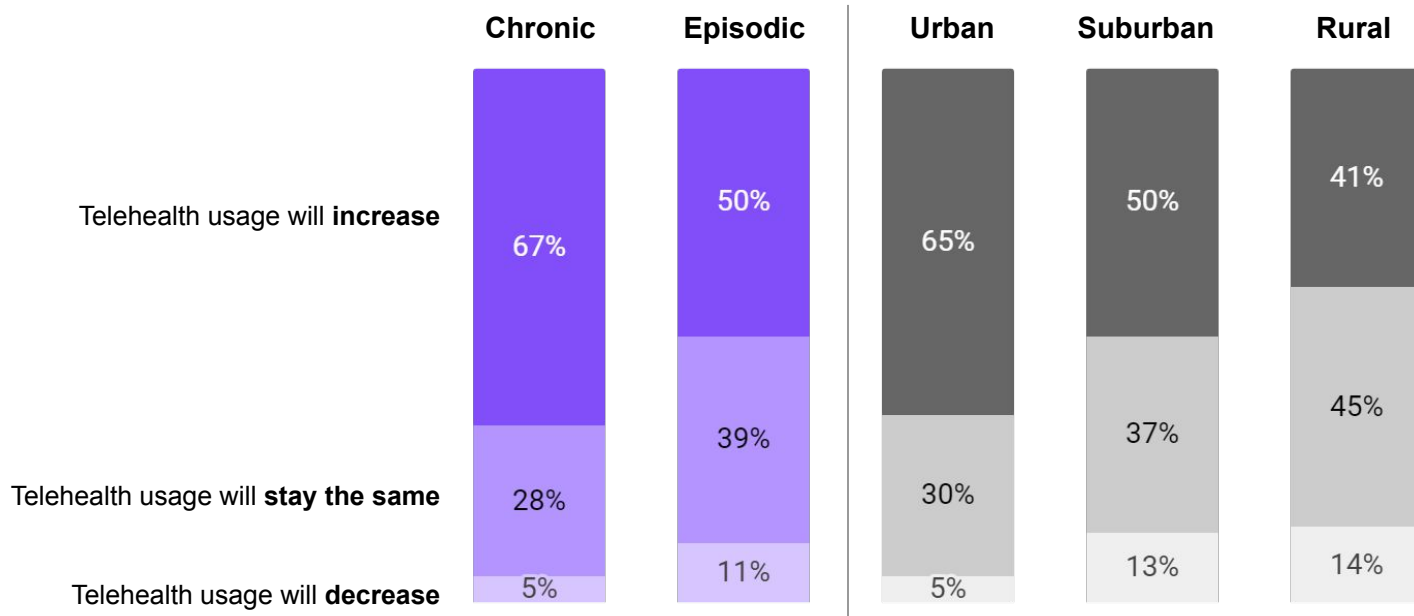
Simple and convenient includes respondents describing experience as: simple, convenient, effective or productive visit, and didn't have to leave home or travel.

HIGH ENGAGEMENT SEGMENTS FEEL TELEHEALTH WILL INCREASE

Chronic and Urban Patients are more likely to feel that telehealth will increase

PERCEIVED FUTURE USAGE OF TELEHEALTH

Amongst Patients Only



CARE TYPES & LOCATIONS

TOP CARE TYPES DELIVERED ARE THOSE BEST SUITED TO TELEHEALTH

Follow-up appointments, chronic management, and mental health are adaptable to telehealth

TYPES OF CARE DELIVERED / RECEIVED

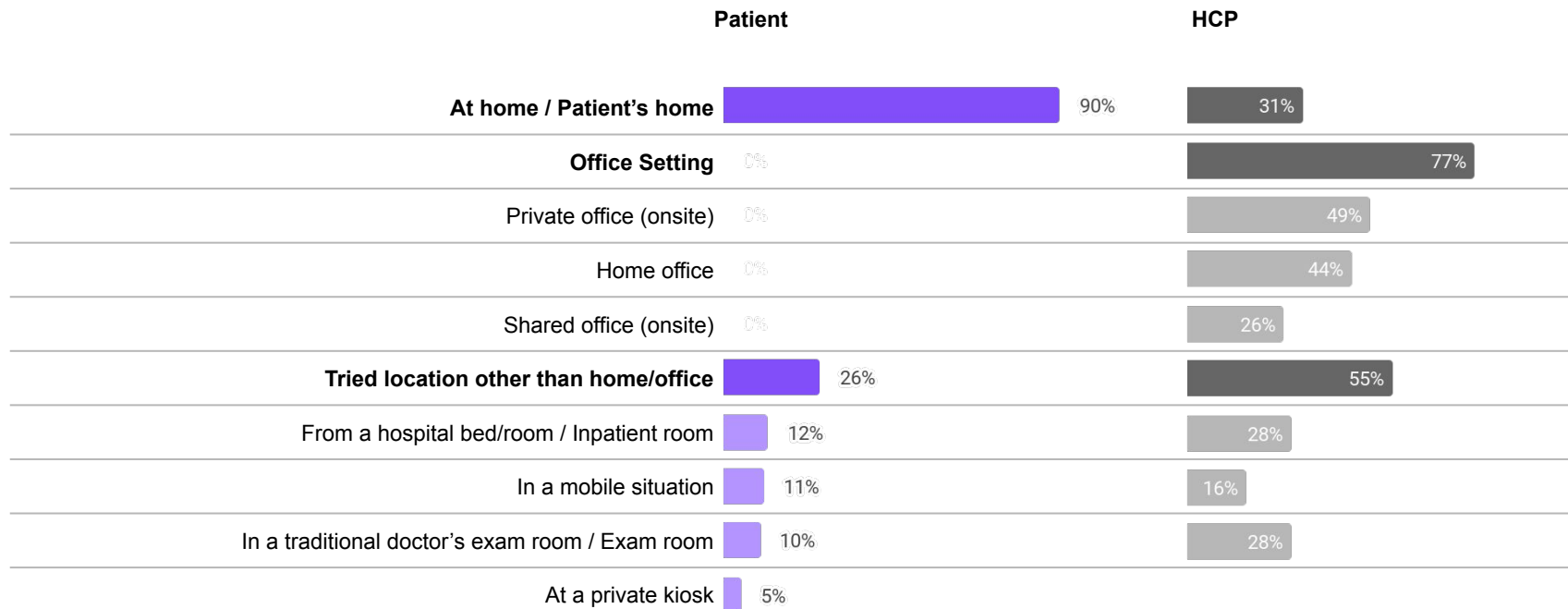
	HCP	Patient
Follow up appointment(s)	64%	14%
Chronic condition management	64%	29%
Mental or behavioral health treatment	63%	20%
Routine healthcare appointments	53%	25%
General pain	47%	26%
Skin conditions	45%	19%
Breathing issue/respiratory infection	42%	11%
Asthma or allergy symptoms	38%	11%
Ear, nose, and throat issues	34%	15%
Diet and nutrition	32%	19%
Emergency care	27%	10%
Prenatal appointments	12%	6%
Physical therapy	11%	12%
Vision needs	8%	11%

“Patient’s need to be screened to make sure they have the correct technology. There are **applications where telehealth works and ones where it is not suitable**...but I’m in psychiatry and talking is our tool. It is **perfectly adaptable to telehealth**...”

“**Follow-up visits in particular do not need face to face** encounter, if just reviewing results and info from previous consultation. Also more convenient for patient and myself...”

HCPs ARE PRACTICING IN A VARIETY OF LOCATIONS

TYPES OF SETTINGS HAD / CONDUCTED DURING TELEHEALTH VISIT

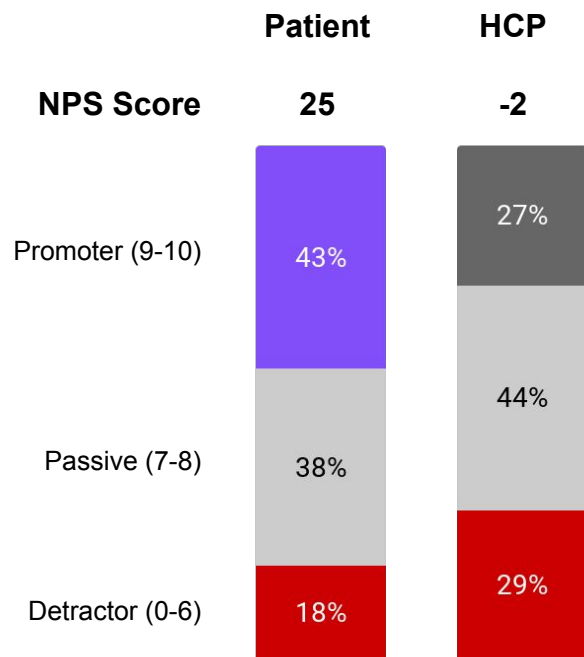


OVERALL EXPERIENCE

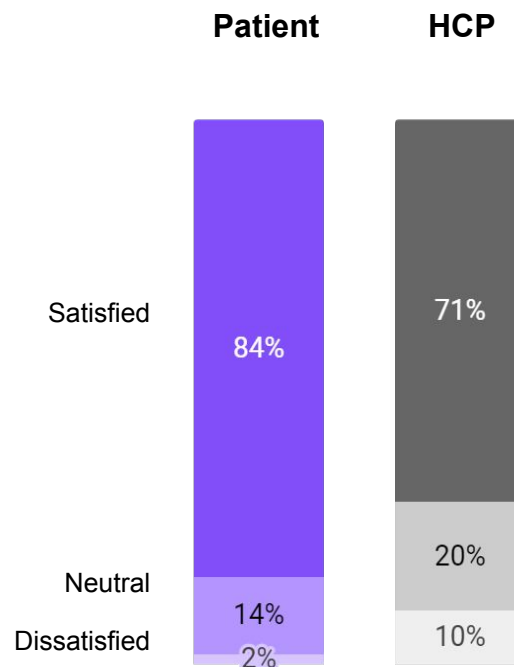
MAJORITY OF HCPs AND PATIENTS ARE SATISFIED WITH TELEHEALTH

HCPs, however, are more likely to not recommend and are more likely to not be satisfied

LIKELIHOOD TO RECOMMEND



SATISFACTION



Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q9_SAT. How satisfied are you with the care you received / delivered during your video-based telehealth visit(s)? On a five point scale, satisfied is defined as four or five and dissatisfied is defined as one or two.

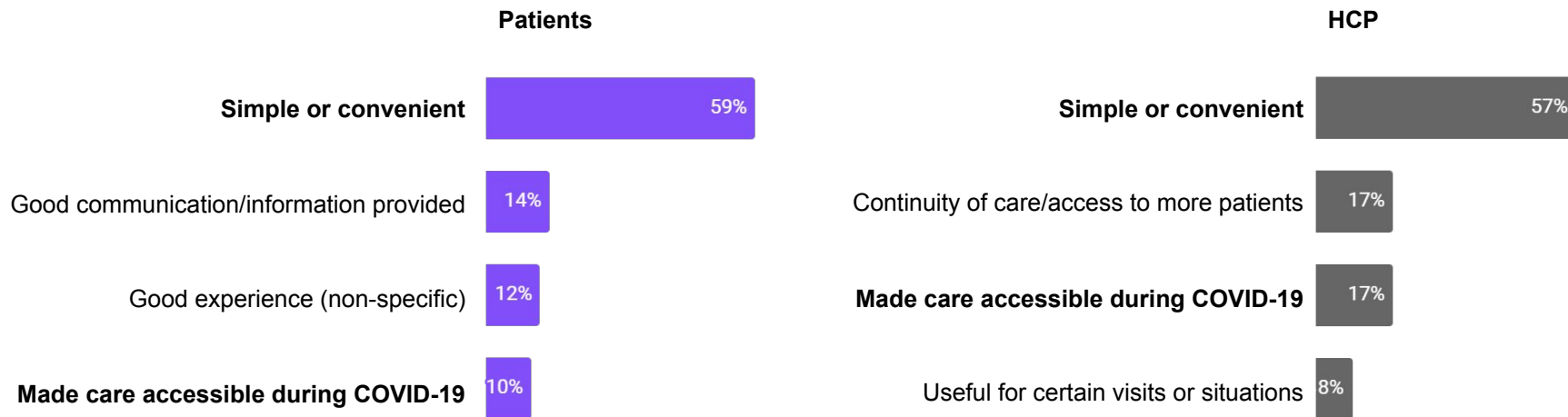
Q9_NPS. How likely are you to recommend using video-based telehealth to friends / colleagues?

Figures may not round perfectly to 100% due to rounding.

SIMPLICITY AND CONVENIENCE DRIVE OVERALL SATISFACTION

HCPs frame their satisfaction through the lense of the pandemic: telehealth has allowed continuity of care during COVID-19 and is useful in certain situations, while patients focus on convenience

REASONS FOR SATISFACTION WITH TELEHEALTH



Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q11A. For what reason(s) are you satisfied with the care you received during your video-based telehealth visit(s)?

Q11B. For what reason(s) are you satisfied with the care you are able to provide during video-based telehealth visits?

Simple and convenient includes respondents describing experience as: simple, convenient, effective or productive visit, and didn't have to leave home or travel.

PATIENTS ARE MORE POSITIVE ABOUT BENEFITS OF TELEHEALTH

HCPs are more concerned about the lack of in-person contact. HCPs likely view telehealth as being useful in specific situations but not a replacement to traditional forms of care.

PERCEPTIONS OF TELEHEALTH EXPERIENCE

Data shown is percent agree.

	Patient	HCP	Δ
Quality of care is just as good as in-person	72%	34%	38
Feel connected as if in same room	72%	46%	26
Video-based telehealth is more efficient than in-person visits	58%	34%	24
Effectively able to show physical concerns	73%	59%	14
I feel confident with video-based telehealth	79%	69%	10
Confident that health concerns can be addressed	77%	68%	9
Allowed patients to receive care otherwise may not have been able	74%	82%	8
Confident personal information is secure and private during visit	78%	74%	4
I feel experienced with video-based telehealth	69%	67%	2

Source: Logitech Global Video-Based Telehealth Sentiment Survey

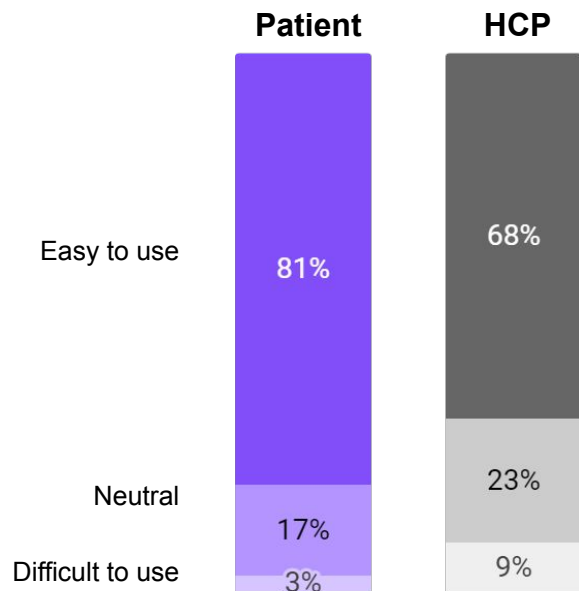
Q13. When thinking about your experiences with telehealth, to what extent do you agree or disagree that...?

Delta (Δ) is calculated by taking the absolute value of the difference between Patients and HCPs.

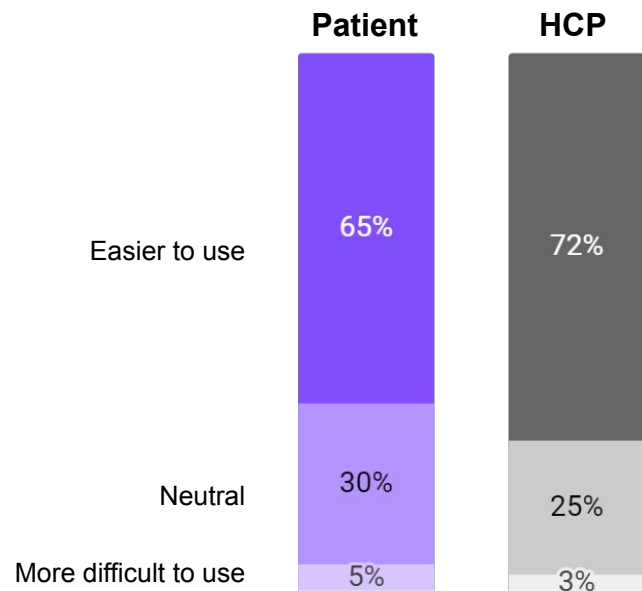
TECHNICAL EXPERIENCE

TELEHEALTH IS EASY TO USE AND IS GETTING EASIER

OVERALL EASE OF TELEHEALTH



EASE OF USE COMPARED TO LAST YEAR



Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q16. Overall, how easy or difficult is it for you to use the technology required for video-based telehealth?

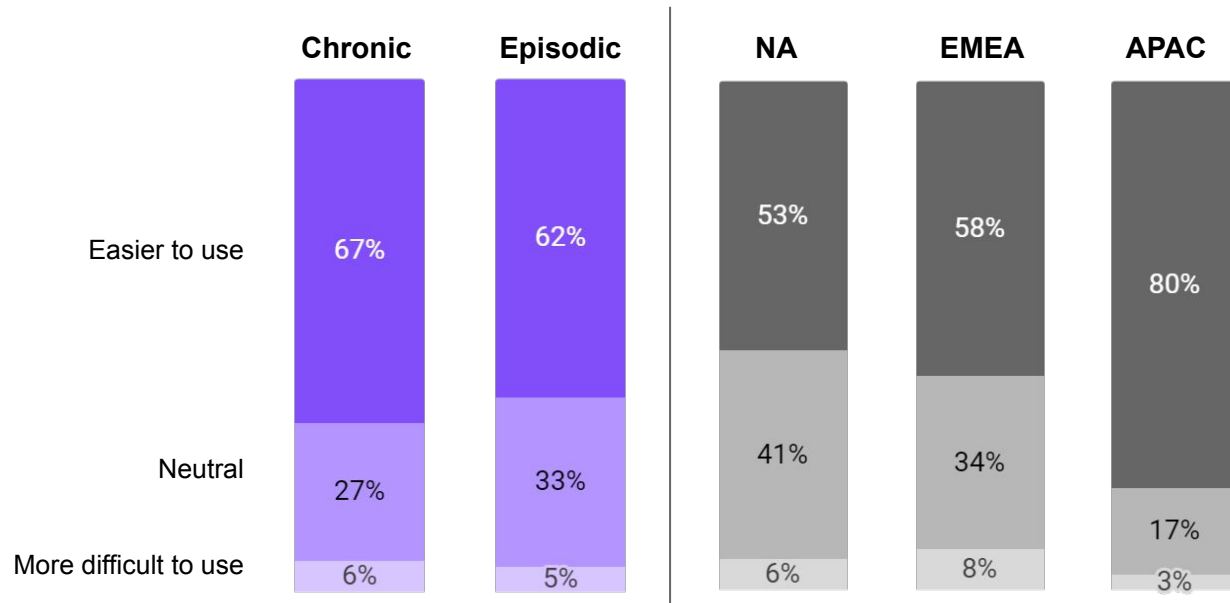
Q17. Over the past year, and compared to previous years, how easy or difficult has your experience using video-based telehealth been?

EASE OF USE IS LIKELY RELATED TO CONTINUED USAGE

Patients that have more experience (Chronic, APAC) rate ease of use higher

EASE OF USE COMPARED TO LAST YEAR

Amongst Patients Only



HCPs ARE LESS SATISFIED WITH THE VIDEO QUALITY THEY DELIVER

SATISFACTION WITH TELEHEALTH TECHNICAL EXPERIENCE

Data shown is the percent satisfied.

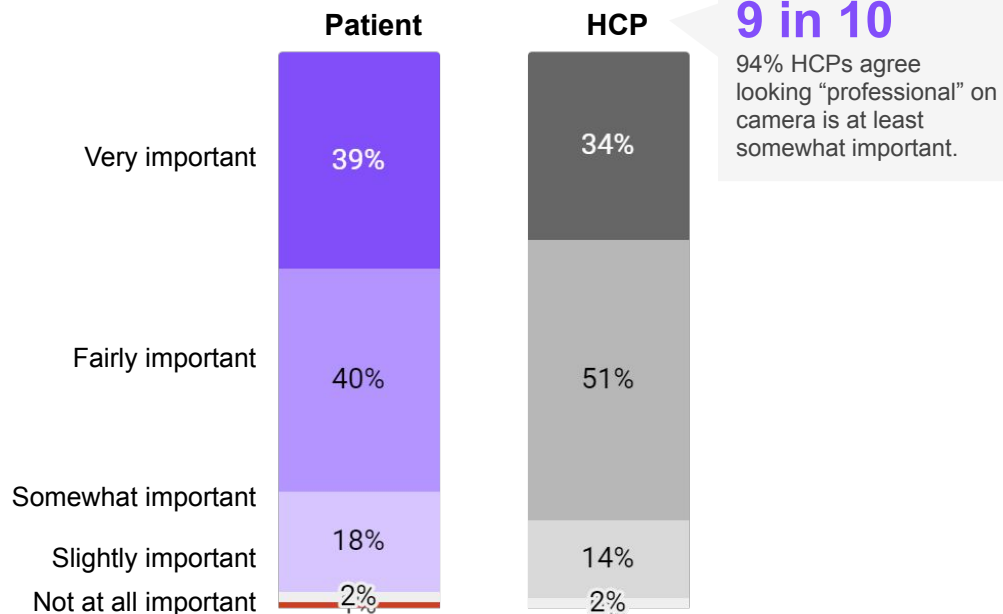
	Patient	HCP	Delta
Video zoom	74%	49%	25
Ease of connecting	86%	66%	20
Video resolution	84%	66%	18
Quality of the internet connection	84%	69%	15
Speed of the internet connection	84%	70%	14
Chat functionality	78%	67%	11
Ability to use on phone/tablet	79%	71%	8
Audio quality	84%	77%	7
Ability to use on desktop/laptop	84%	84%	0

VIDEO EXPERIENCE

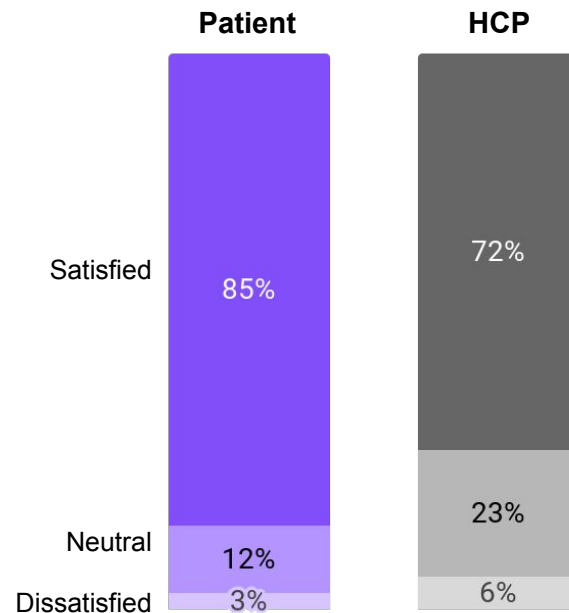
PATIENTS AND HCPs AGREE: HCP VIDEO QUALITY IS IMPORTANT

Patients and HCPs are largely satisfied with the HCP video quality, although HCPs are less satisfied

IMPORTANCE OF HCP VIDEO QUALITY



SATISFACTION WITH HCP VIDEO QUALITY



Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q38. How important is the video-quality that you deliver to your patients as a part of the patient's overall video-based telehealth experience? / How important is your provider's video quality to the overall video-based telehealth experience?

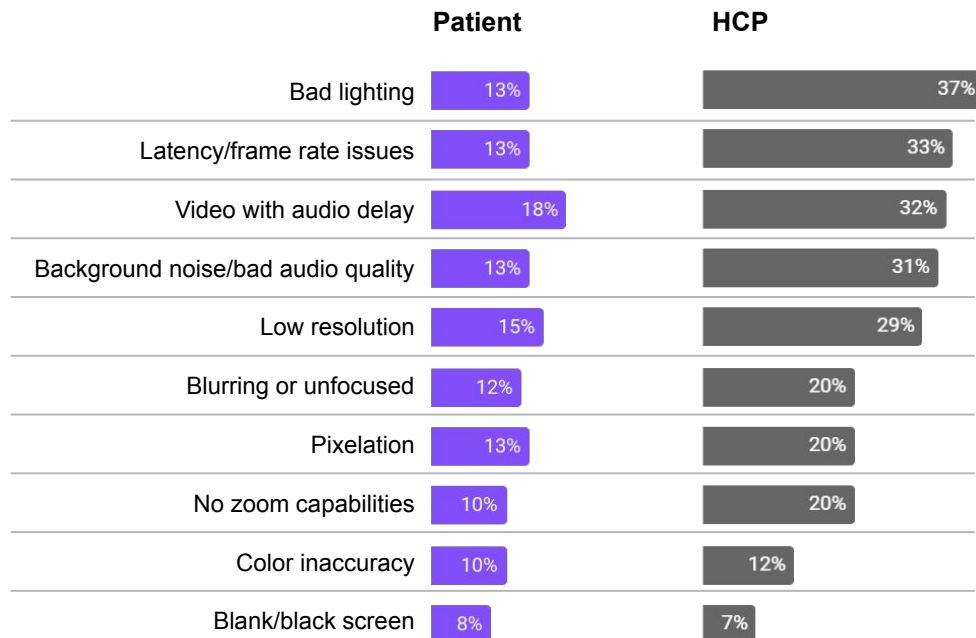
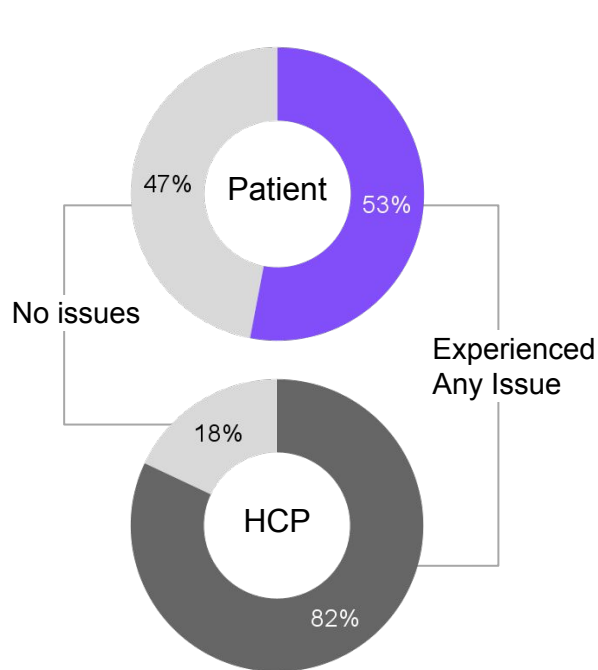
Q18. How important is it to you to be seen on your camera as "professional" when conducting a video-based telehealth visit? Data shown are those who said either, Very, fairly, somewhat, or slightly important.

Q31. Thinking back to your recent video-based telehealth visit(s), how satisfied were you with the video quality that you received / delivered? On a five point scale, satisfied is defined as four or five and dissatisfied is defined as one or two.

HCPs ENCOUNTER MORE TECHNICAL ISSUES

82% of HCPs encounter technical issues, potentially explaining the lower satisfaction in video quality

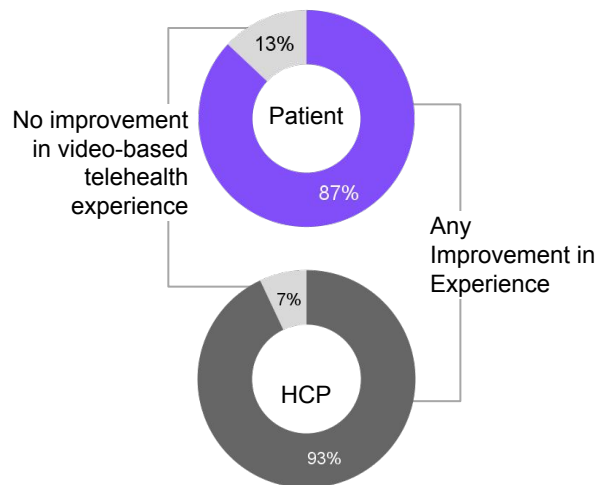
TECHNICAL EXPERIENCE WITH HCP VIDEO STREAM



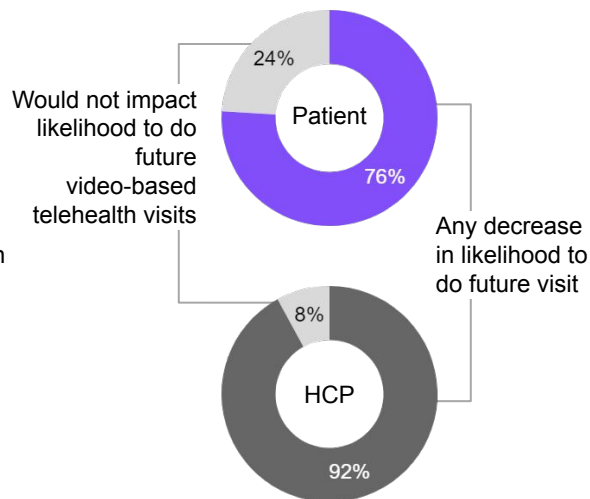
PATIENTS AND HCPs AGREE: BETTER HCP VIDEO = BETTER EXPERIENCE

IMPACT OF HCP VIDEO QUALITY ON TELEHEALTH EXPERIENCE AND FUTURE USAGE

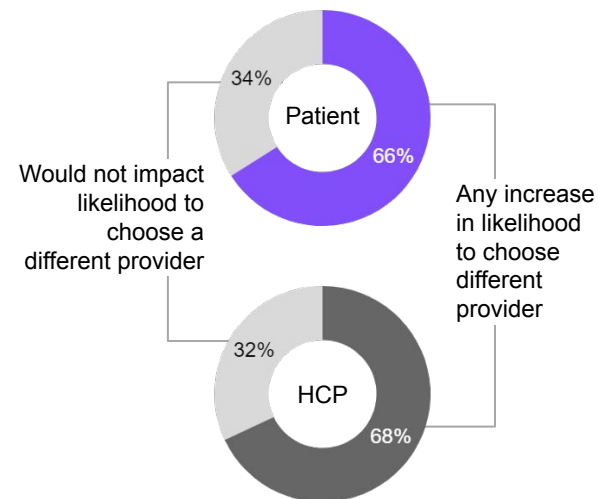
Better HCP Video Would Improve Experience



Poor HCP Video Would Impact Future Visits



Poor HCP Video Would Impact Likelihood to Switch Provider



Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q39. How much would better video quality from healthcare provider improve the overall video-based telehealth experience?

Q40. How would poor video quality from healthcare provider affect patient likelihood to do future video-based telehealth visits?

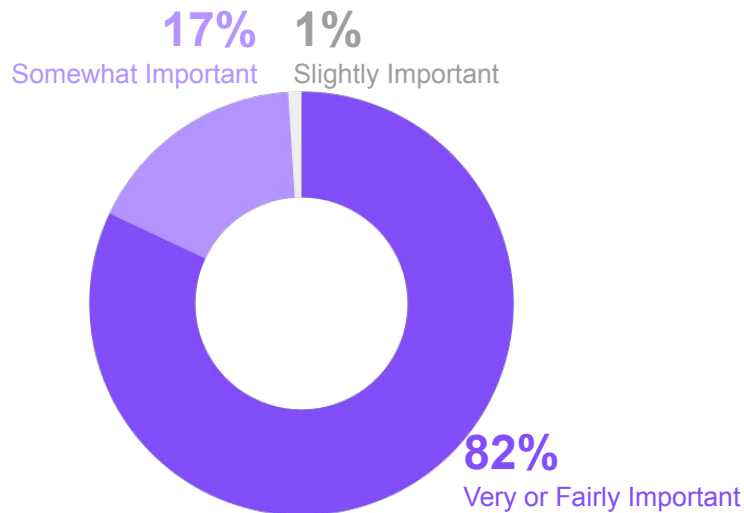
Q41. How would poor video quality from healthcare provider affect patient likelihood to choose a different healthcare provider?

HCPs AGREE PATIENT SATISFACTION WITH HCP VIDEO IS CRITICAL

100% of HCPs feel that patient satisfaction with HCP video quality is at least slightly important. HCPs also understand the risks of patient dissatisfaction: patients stop engaging.

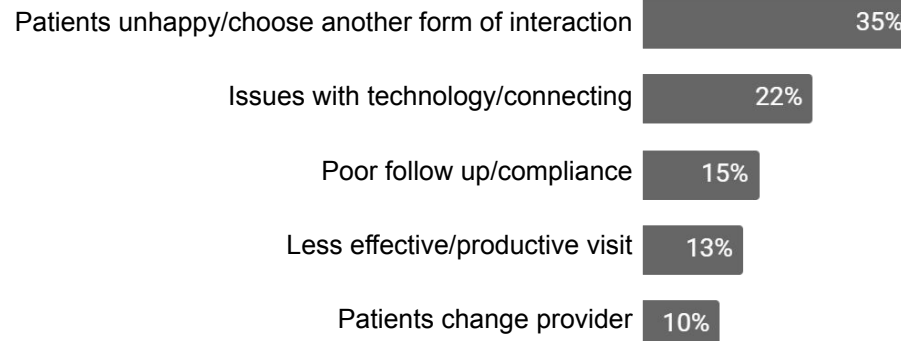
IMPORTANCE OF PATIENT SATISFACTION WITH HCP VIDEO QUALITY

Amongst HCPs Only



DOWNSIDES TO PATIENTS BEING DISSATISFIED WITH VIDEO-BASED TELEHEALTH

Amongst HCPs Only

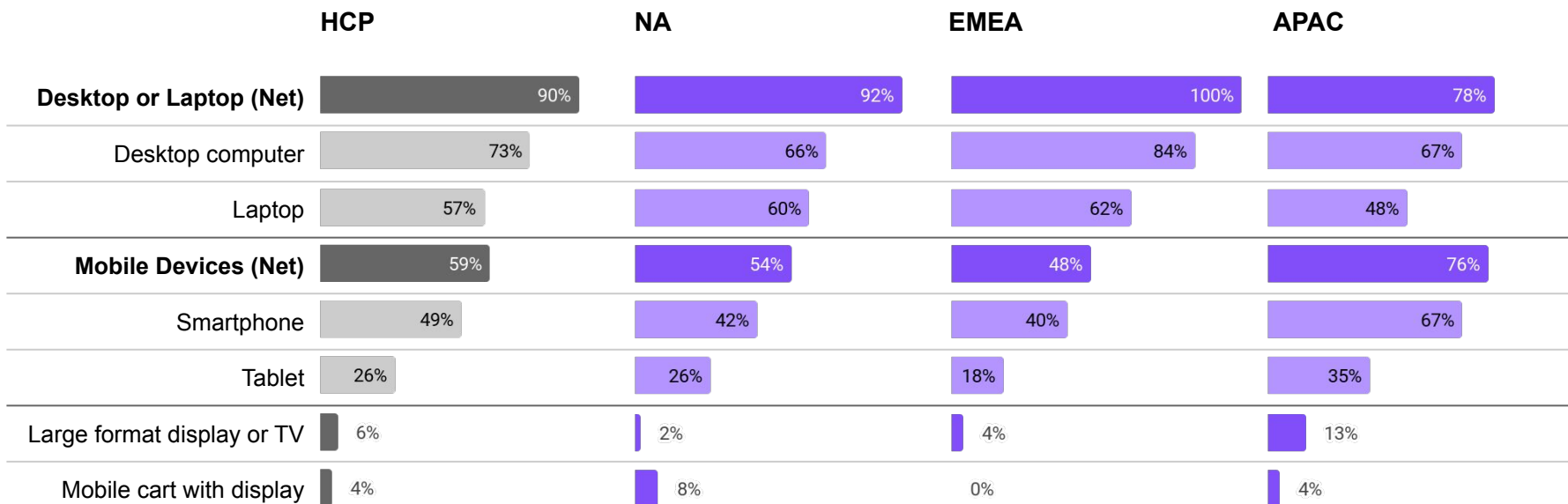


PROVIDER SPECS

NA AND EMEA RELY ON DESKTOP/LAPTOP, APAC RELIES ON MOBILE

DEVICES USED FOR TELEHEALTH VISITS

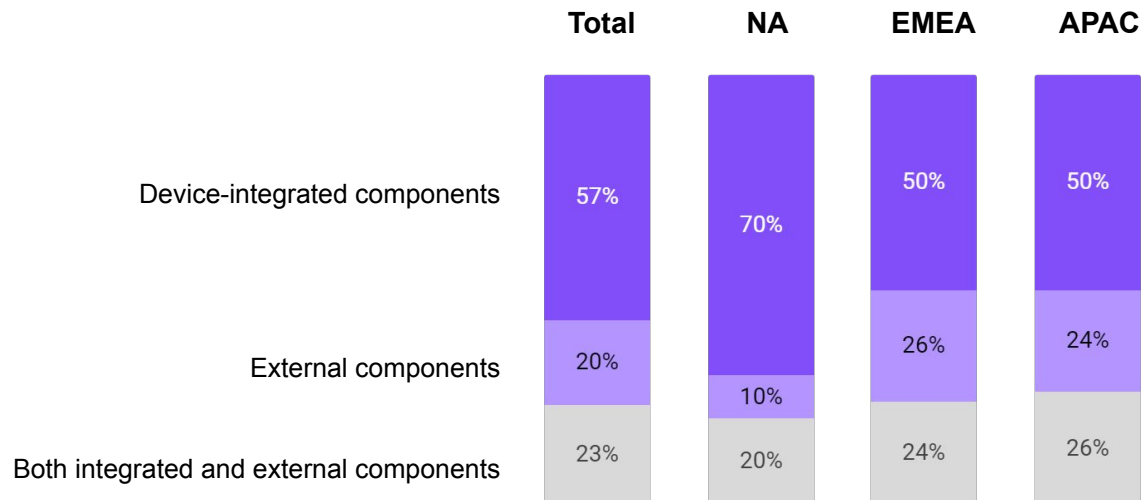
Amongst HCPs Only



EMEA AND APAC MORE LIKELY TO USE EXTERNAL COMPONENTS

COMPONENTS USED FOR TELEHEALTH VISITS

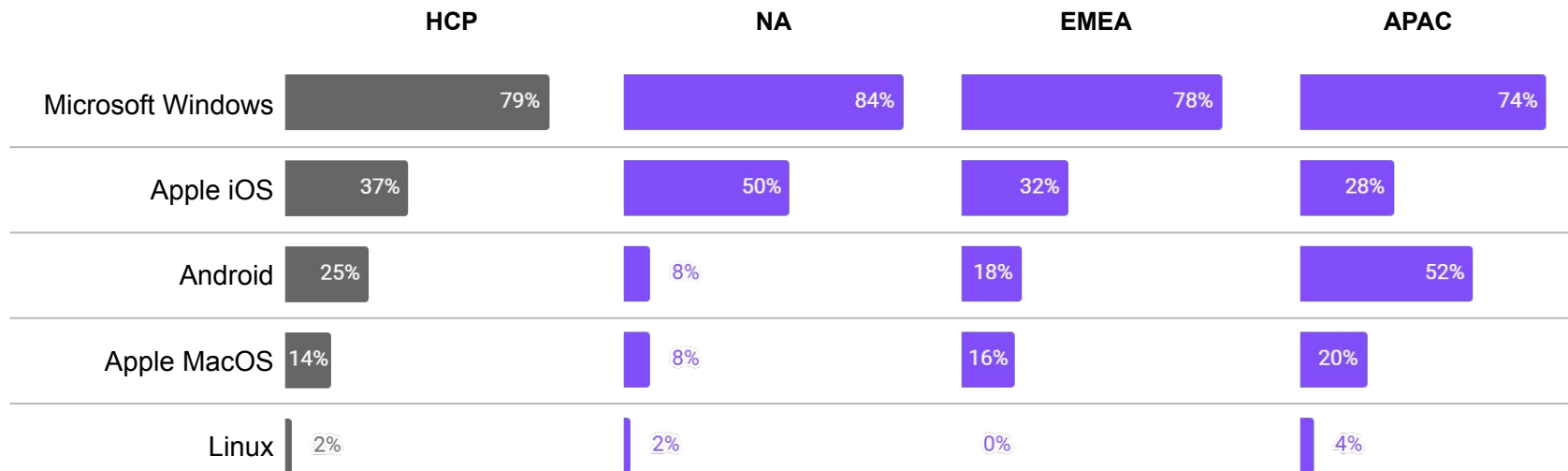
Amongst HCPs Only



ANDROID MORE PREVALENT IN APAC; APPLE MORE SO IN NA

OPERATING SYSTEMS USED FOR TELEHEALTH VISITS

Amongst HCPs Only



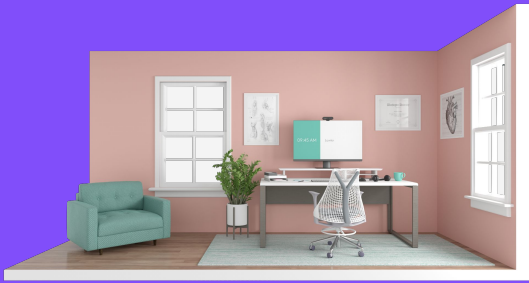
Source: Logitech Global Video-Based Telehealth Sentiment Survey

Q22. What operating system(s) are installed on the device(s) you use for conducting video-based telehealth visits?

SUMMARY

KEY FINDINGS

- PATIENTS AND DOCTORS HAVE SO FAR EMBRACED **TELEHEALTH AS A VIABLE OPTION** TO TRADITIONAL IN-PERSON VISITS.
- BOTH PATIENTS AND HCPs PREDICT THAT **TELEHEALTH WILL INCREASE** OVER THE NEXT YEAR. WHILE SOME FEEL THAT THE INCREASE WILL BE DUE IN PART TO CONTINUED COVID-19 IMPACT, MANY SEEM TO UNDERSTAND THE BENEFITS OF TELEHEALTH LONGER-TERM.
- WHILE PEOPLE GENERALLY FIND TELEHEALTH EASY TO USE, THOSE WHO USE OFTEN ARE MORE LIKELY TO RUN INTO **TECHNICAL ISSUES**.
- **HCPs OVERALL ARE LESS SATISFIED** WITH THE TELEHEALTH EXPERIENCE. PATIENTS OVERALL ARE MORE POSITIVE, PARTICULARLY HIGHER USAGE PATIENT SEGMENTS.
- BOTH HCPs AND PATIENTS AGREE THAT THE **HCP VIDEO QUALITY IS IMPORTANT**.
- PATIENTS AND HCPs ALSO AGREE THAT **BETTER VIDEO QUALITY WOULD IMPROVE THEIR EXPERIENCE** WITH TELEHEALTH.



**Rethink what's
possible from a
patient's bedside, a
provider's home,
and anywhere in
between.**





THANK YOU

Learn more at www.logitech.com/healthcare

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