Telemedicine

Executive Brief
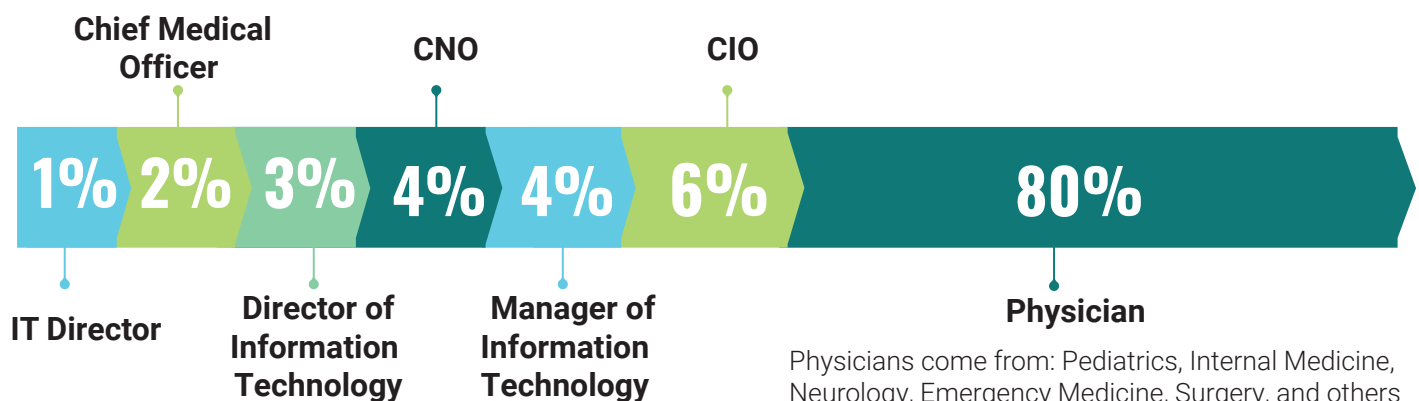
Table of Contents

Demographics

Introduction

In recent months we've had thousands of providers engage with the Research Cloud. One question they provide insights on is that of emerging technologies, and which ones would be most useful. Telemedicine typically makes the shortlist. Recently, the Centers for Medicare and Medicaid Services (CMS) announced plans to increase reimbursements for remote visits. Naturally, a few questions come to mind. Who is aware of the CMS news, whether telemedicine is continuing to gather steam, what the adoption rates are, which vendors they are using, and what the benefits are to name a few. But perhaps most importantly, are patients even interested and will they use such an option?

Participants' Organizations

N=283

Community Hospital	Academic Medical Center	Specialty Clinic	IDN
26%	23%	21%	7%
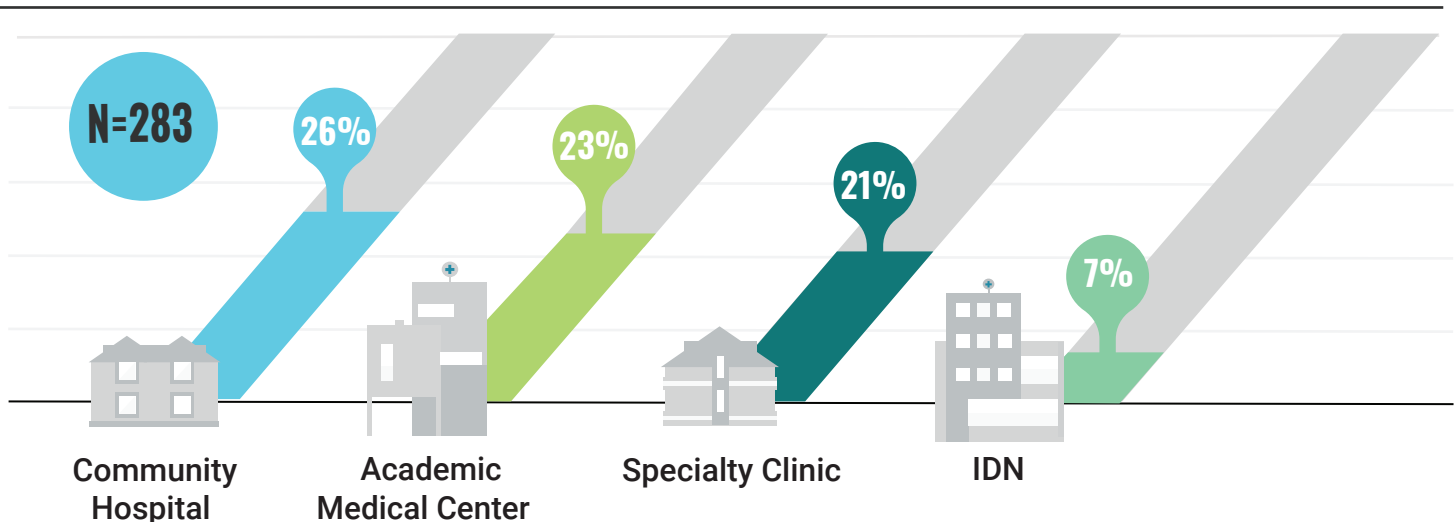
*Other facilities (not showing above): Critical Access Hospitals 6%, Family Practice 5%, Childrens Hospitals 3%, Mental Health Facilities 3%, VA Hospitals 2%, Rehab Hospitals 1%, Home Health 1%, Military 1%, Cancer Hospitals 1%, Imaging Centers 1%

Participants' Top Titles

IT Director 1% — Chief Medical Officer 2% — Director of Information Technology 3% — CNO 4% — Manager of Information Technology 4% — CIO 6% — Physician 80%

Physicians come from: Pediatrics, Internal Medicine, Neurology, Emergency Medicine, Surgery, and others

CMS Reimbursement Proposal

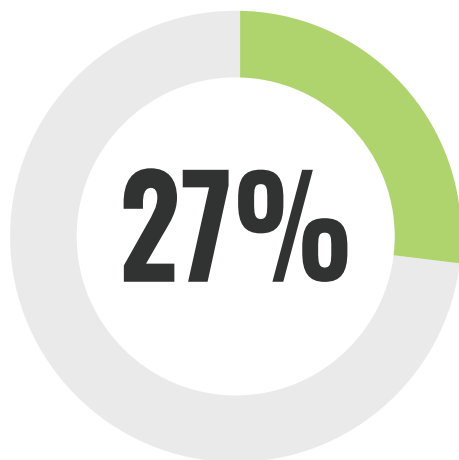## Knowledge of CMS' Expanded Telemedicine Reimbursement Announcement
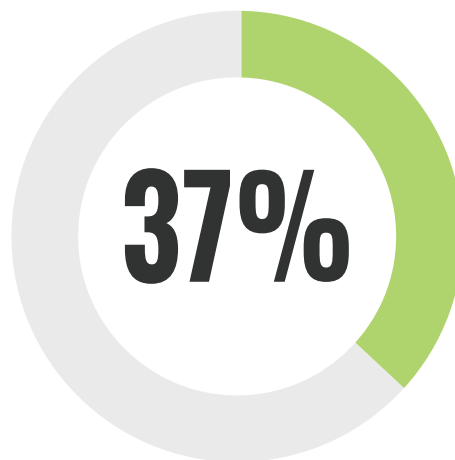
33% YES

67% NO

Most Aware?

Community Hospital	Academic Medical Center	Specialty Clinic
27%	37%	36%

CMS Reimbursement Proposal

Effect of Increased Telemedicine Reimbursement on Adoption Timelines

63%	37%

Would speed up implementation/increase use.   No Impact
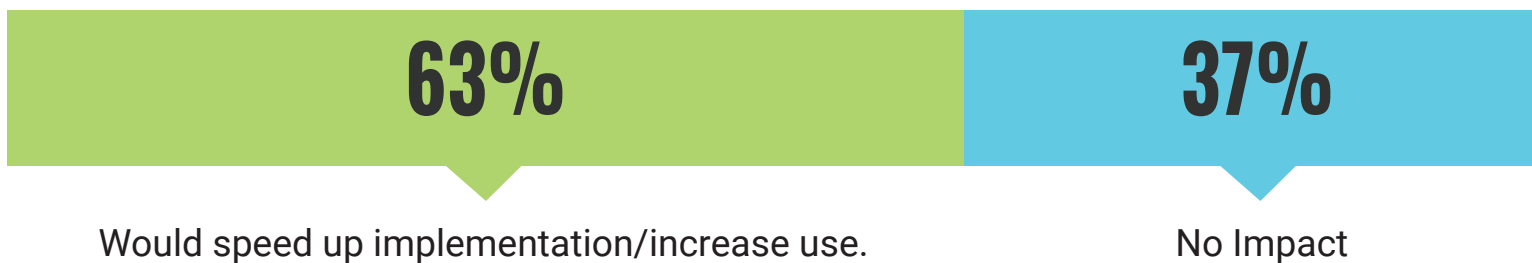
Effect of Increased Reimbursement By Organization Type

No Impact

Would speed up implementation/ increase use

44%	36%	32%
56%	64%	68%

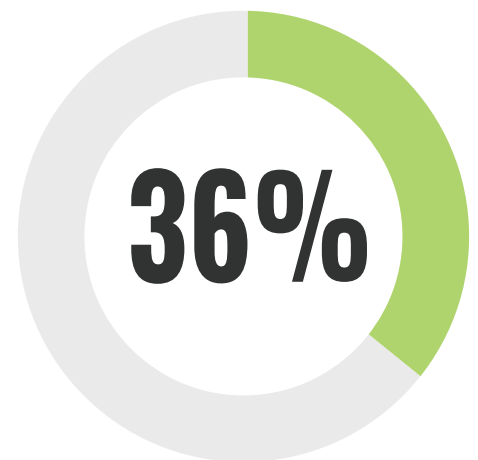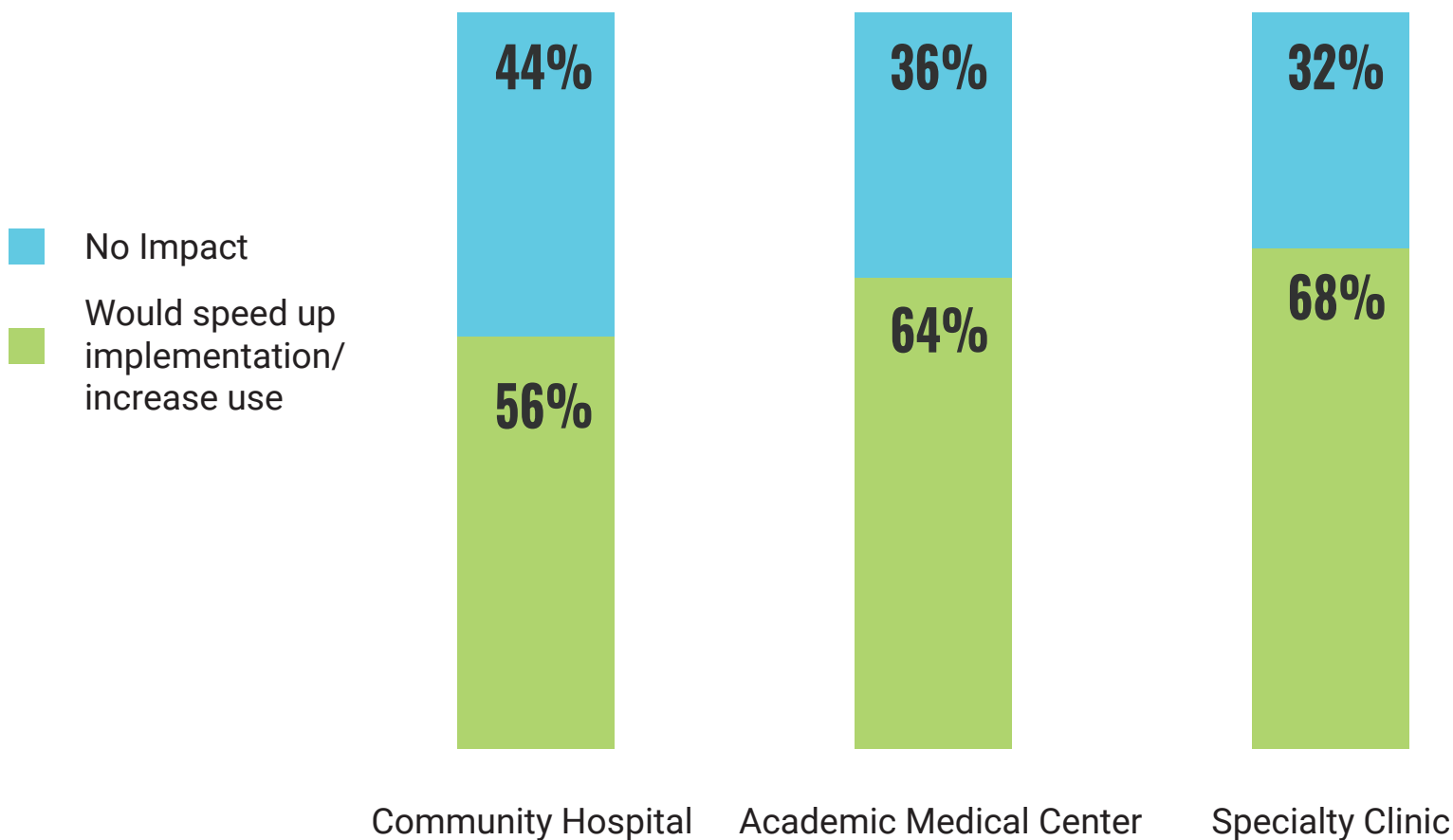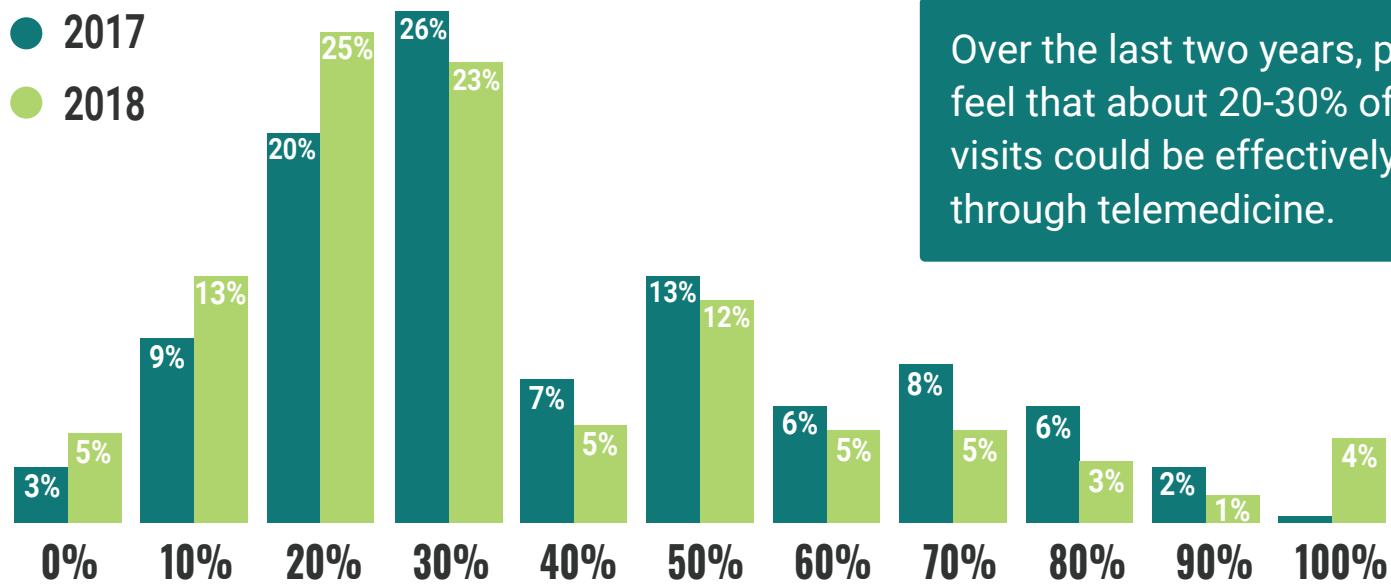Community Hospital   Academic Medical Center   Specialty Clinic

Telemedicine Frequency

Percent of Patient Visits That Could be Effectively Handled Through Telemedicine

● 2017
● 2018

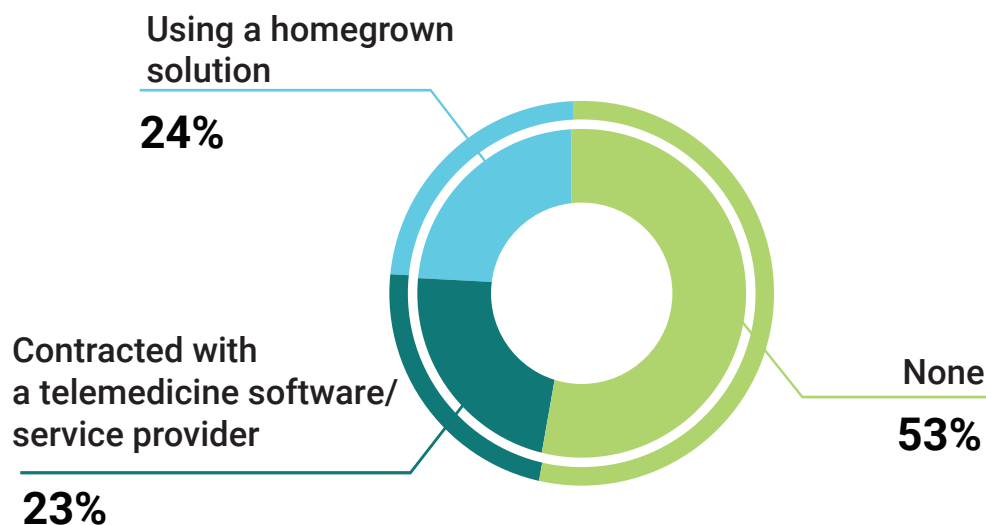|	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
2017	3%	9%	20%	26%	7%	13%	6%	8%	6%	2%	
2018	5%	13%	25%	23%	5%	12%	5%	5%	3%	1%	4%

Over the last two years, providers feel that about 20-30% of patient visits could be effectively handled through telemedicine.

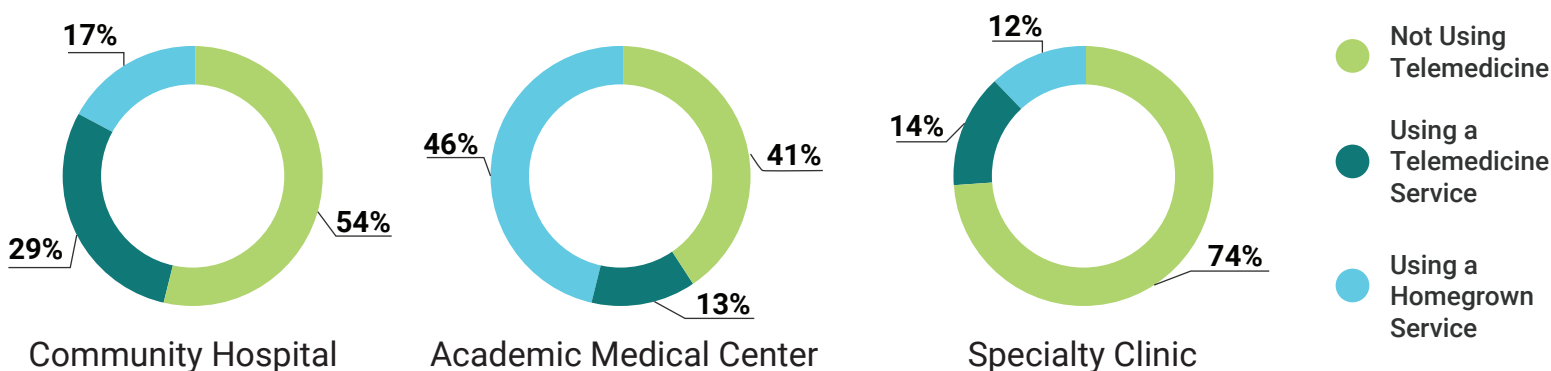## How Often Patients Request Telemedicine Visits

No Requests						Daily Requests
55%	23%	12%	3%	2%	2%	3%

Telemedicine Adoption

Among Participants

Using a homegrown solution
24%

Contracted with a telemedicine software/service provider
23%

None
53%
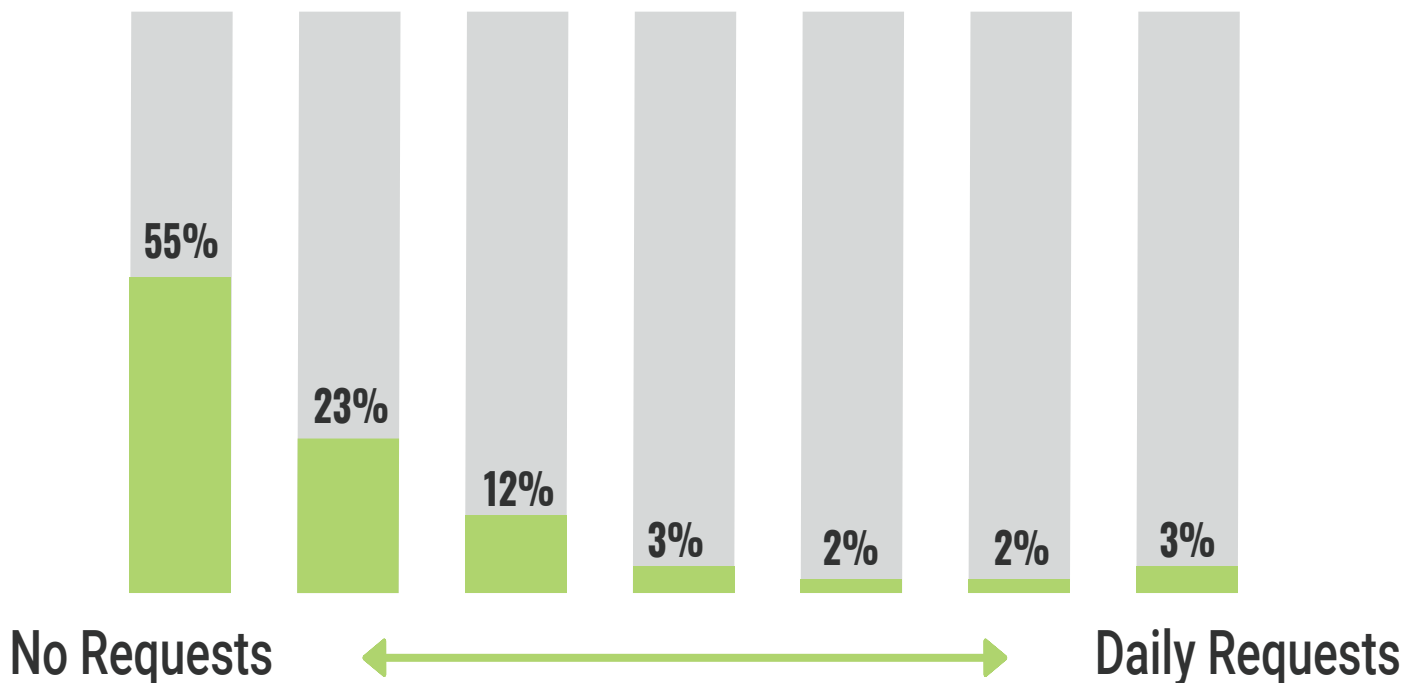
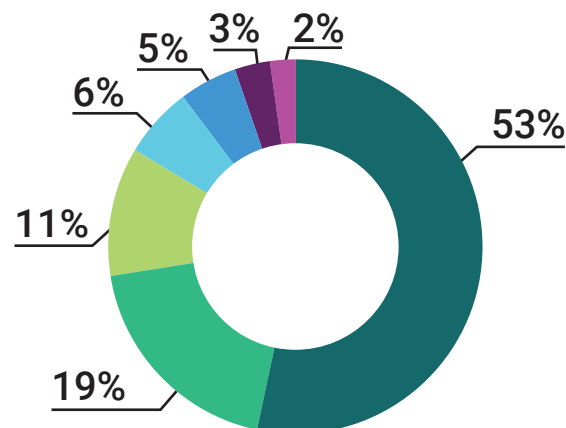*"I don't believe these "consultations" are in the patients best interest"*
-Surgeon

"Our impression is that face to face contact is better for patient care than via telemedicine."
- Pediatrician

Adoption Rates by Org Type

17%
29%
54%
Community Hospital

46%
13%
41%
Academic Medical Center

12%
14%
74%
Specialty Clinic

● Not Using Telemedicine
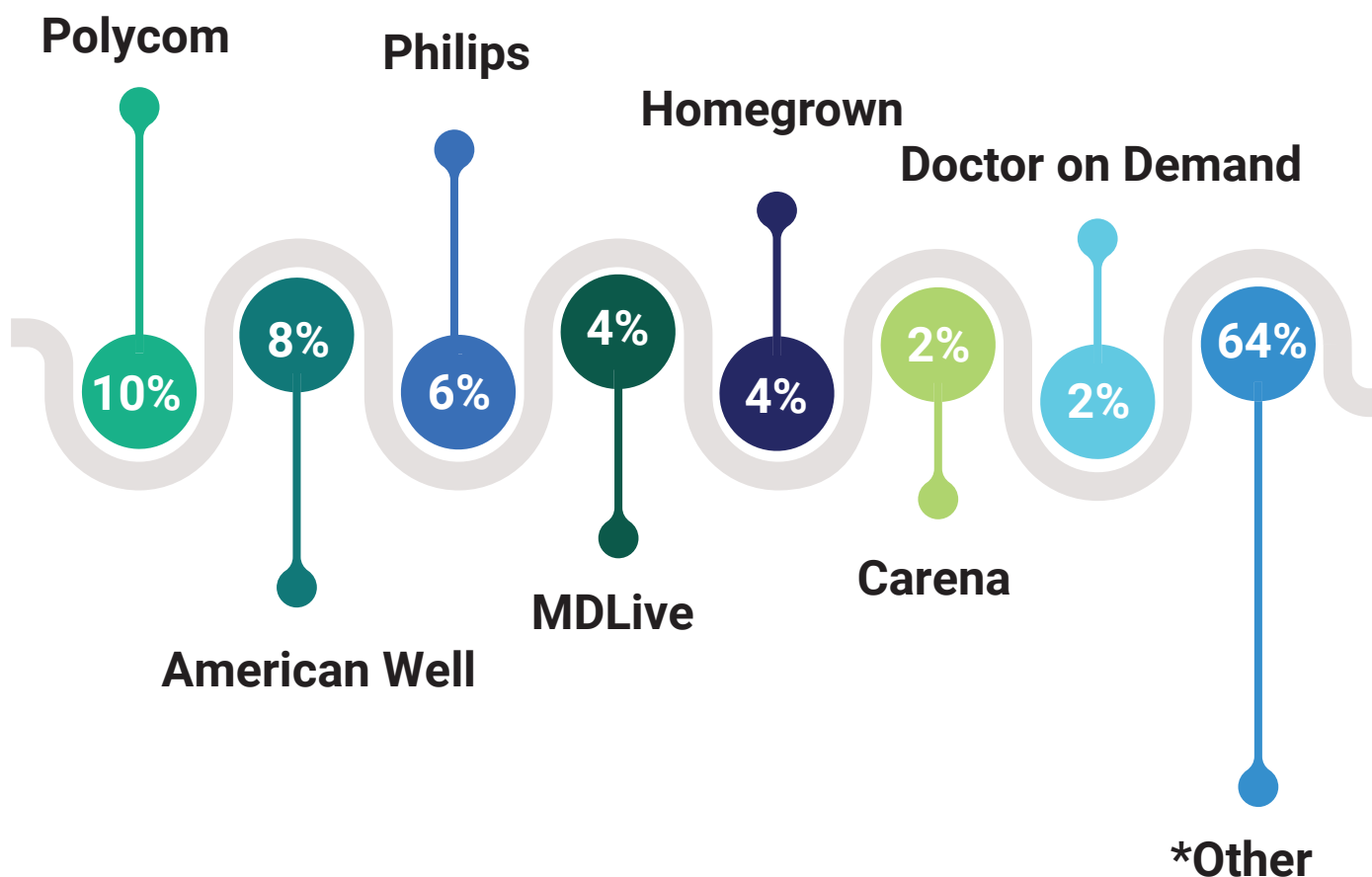● Using a Telemedicine Service
● Using a Homegrown Service

Telemedicine Adoption Plans

● Watching and interested, but have no specifc plans or timelines
● Adoption of telemedicine is largely contingent on CMS and payer funding for these services
● Never going to adopt telemedicine
● Evaluating telemedicine software/service solutions
● Moving forward with telemedicine, but it's more than a year out
● Will launch telemedicine within the next year
● Will use homegrown solution

5% **3%** **2%**
6%
53%
11%
19%

Vendor Mentions

Being Used By Participants

Polycom 10%

American Well 8%

Philips 6%

MDLive 4%

Homegrown 4%

Carena 2%

Doctor on Demand 2%

*Other 64%

*Other Solutions Mentioned

Apple **Microsoft** **Google** **Zoom**

Epic **Jabber** **Vidyo** **Medcall Advisors**

Spruce **Telistat** **Vivify** **Intouch** **Chiron Health**

Telemedicine Benefits and Education

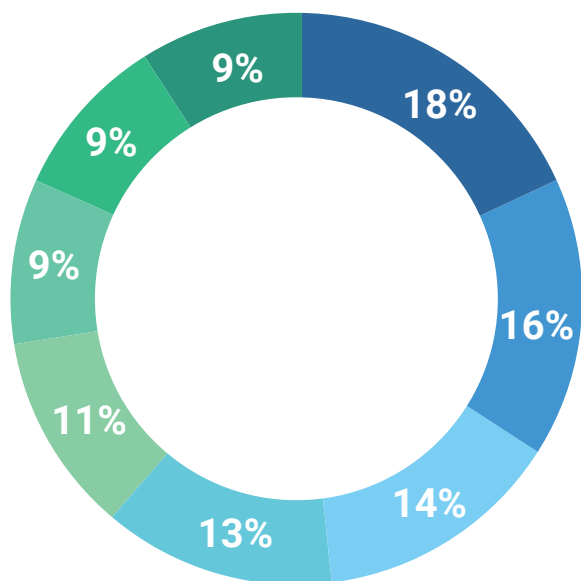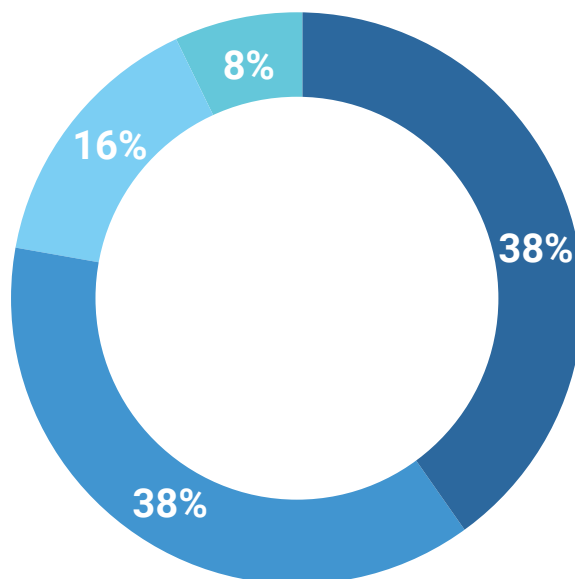**Reaction Data**

Greatest Benefits From Telemedicine

- Helps reach patients with transportation limitations
- Allows for simpler and more cost effective ways to deliver care
- Allows for after-hours patient consults
- Allows us to treat more patients
- Eases demands on our care providers
- Brings in new patients
- Helps with overcrowding at our facilities
- Provides a viable source of revenue

Chart values: 18%, 16%, 14%, 13%, 11%, 9%, 9%, 9%

How Are Patients Being Educated

- During/after in person visits
- Website/patient portal
- Newsletters, email circulation
- Paid advertising

Chart values: 38%, 38%, 16%, 8%

About Us

Reaction Data is the first of its kind - a Research as a Service company that serves healthcare provider organizations, payers, vendors, and life sciences companies. Research as a Service is the combination of our proprietary Research Cloud platform, cutting-edge best practices, and massive network of healthcare leaders to get critical insights incredibly fast.

Our clients are able to get answers to important questions within hours to better understand their market, their customers, and their employees. To learn more about this and other research engagements currently taking place in the Research Cloud, please contact our CEO, Jeremy Bikman, at jeremy@reactiondata.com

Reaction Data