



Trends in Telemedicine Usage

EBRI Webinar

September 27, 2021

Speakers



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National Practice
Leader, Legal
Consulting
Group, Aon**

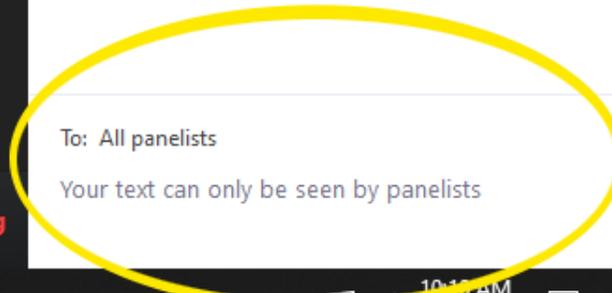
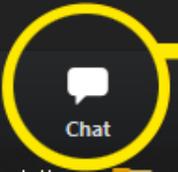
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Trends in Telemedicine Usage: 2016-2020

Jake Spiegel, EBRI Research Associate

EBRI's Telemedicine Project Overview

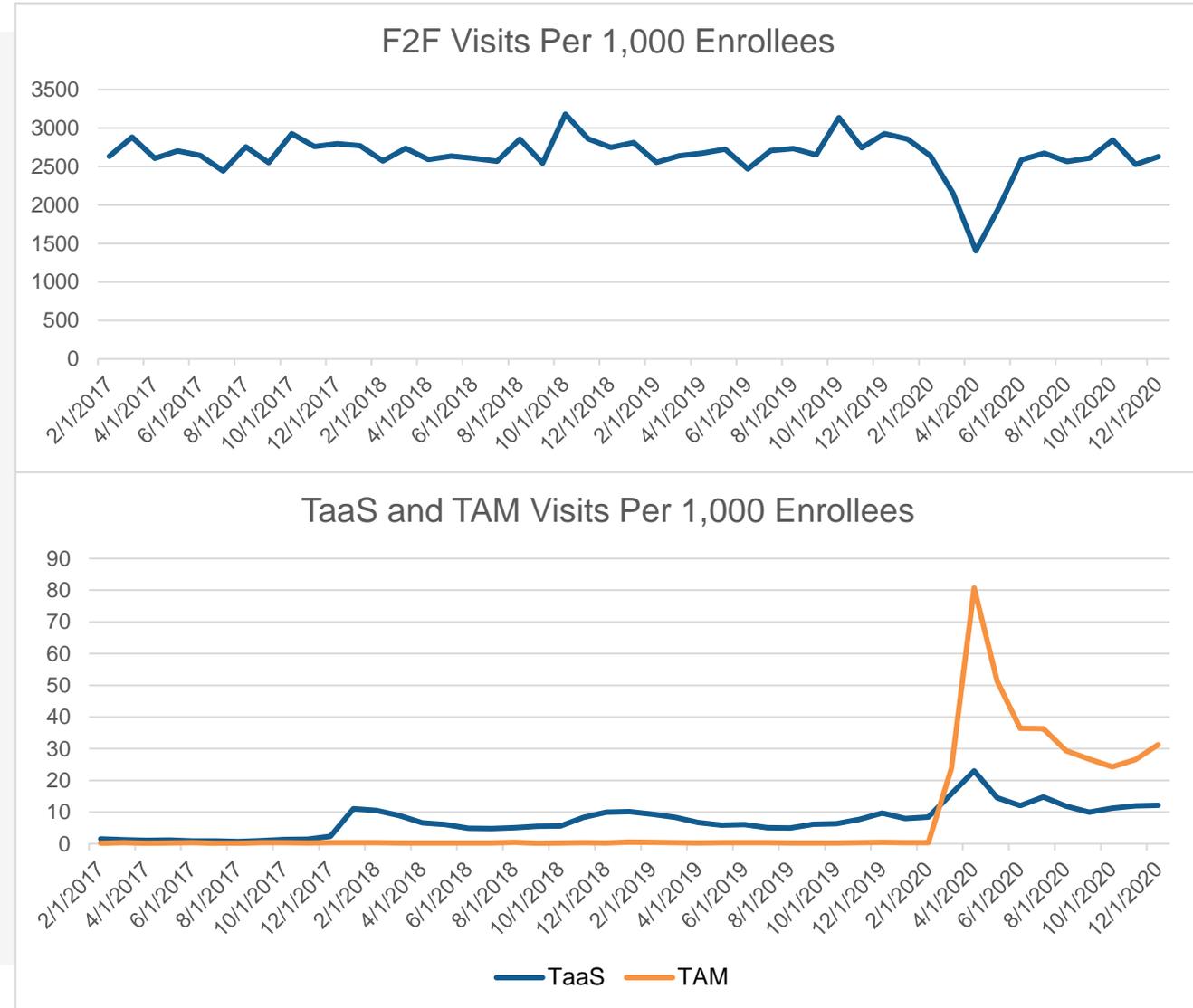
- At the beginning of 2021, EBRI planned to produce three papers examining telemedicine
 - The first paper, a literature review, was released in April
 - This webinar is based on analyses conducted in a second paper, released in August
 - A third study examining the impact of telemedicine on spending behavior and downstream visits is currently underway
- These studies use administrative claims data from a group of employers
- The dataset contains over 100,000 covered lives, including spouses and dependents
- The data contains nearly 16 million health care claims between 2016 and 2020, accounting for more than \$600 million in claims

The Two Flavors of Telemedicine

- In the course of our analysis, we found it useful to differentiate between two types of telemedicine
- These two types of telemedicine feature different patient experiences, and so may attract different patients seeking care for different health issues
- With telemedicine as a service (TaaS), patients are connected to a health care provider through a third-party app, and typically do not have a preexisting relationship with this provider
 - Examples include Teladoc, Doctors on Demand, MDLIVE, etc
- With telemedicine as a medium (TAM), patients use their health care providers' own platform to conduct a synchronous videoconferencing visit, use remote monitoring technologies, and, in contrast to TaaS, typically *do* have a preexisting relationship with this provider
 - Examples include using their primary care physician's telemedicine platform, using remote respiratory or circulatory monitoring technology, etc

Telemedicine Visits, 2016 – 2020

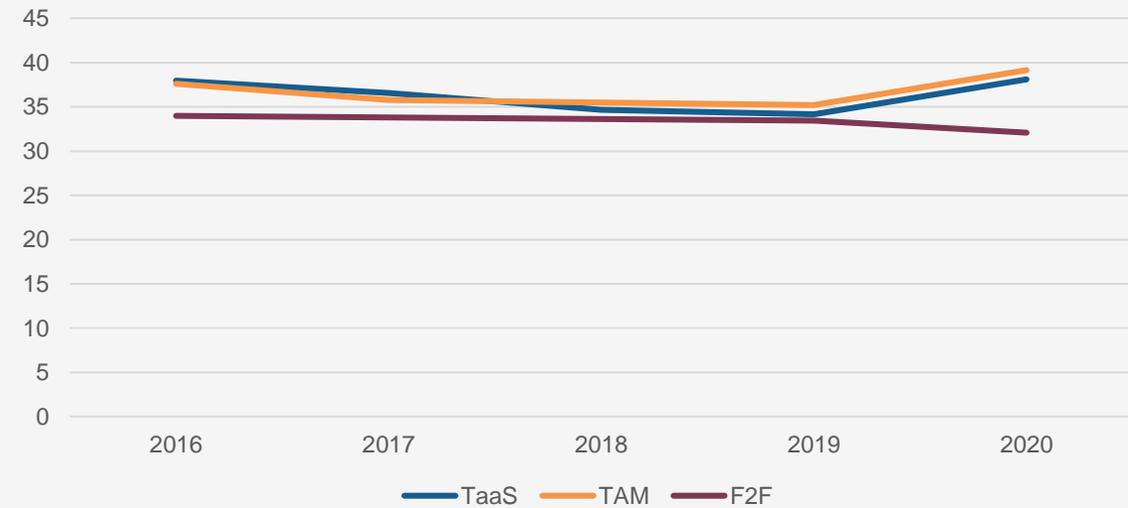
- Face to Face (F2F) visits dropped precipitously in March 2020 when states began issuing stay at home orders
- In response, both TaaS and TAM visits rose dramatically in March 2020
- TAM saw a larger increase, perhaps as doctor's offices spun up their own telemedicine platforms to provide health care services to their patients
- Both TaaS and TAM visits dropped after stay at home orders were lifted, and health care providers resumed in-person services, but utilization remained higher than pre-pandemic levels



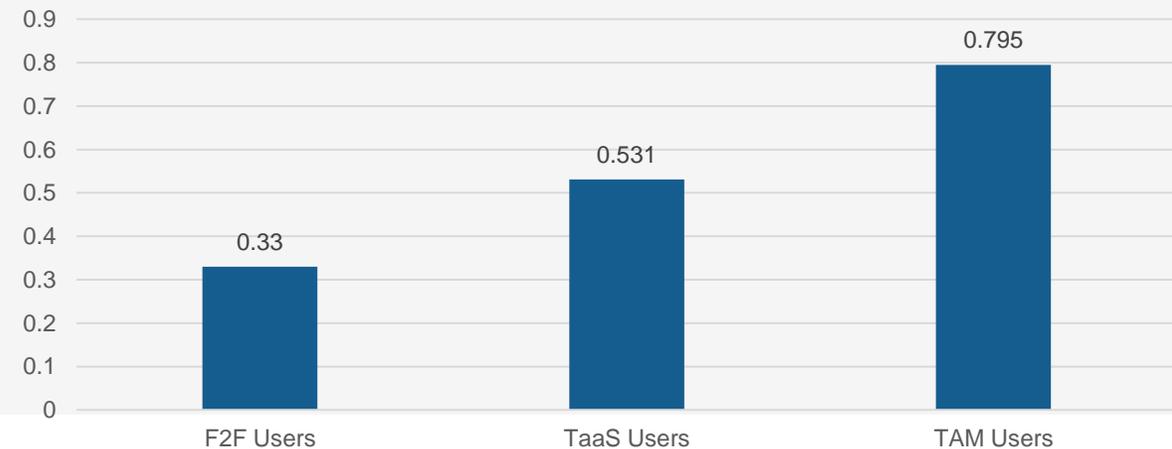
Who Used Telemedicine?

- Telemedicine users of both flavors were on average slightly older than non-telemedicine users
- We also observe that both TaaS and TAM users were more likely to be female (56% and 55%, respectively) than patients who exclusively used F2F services (52%)
- TaaS and TAM users were also more likely to be the named policyholder
- TaaS and TAM users also had a higher Charlson Comorbidity Index (0.531 and 0.795, respectively) than F2F users (0.33)

Average Age of TaaS, TAM, and F2F Users, Over Time

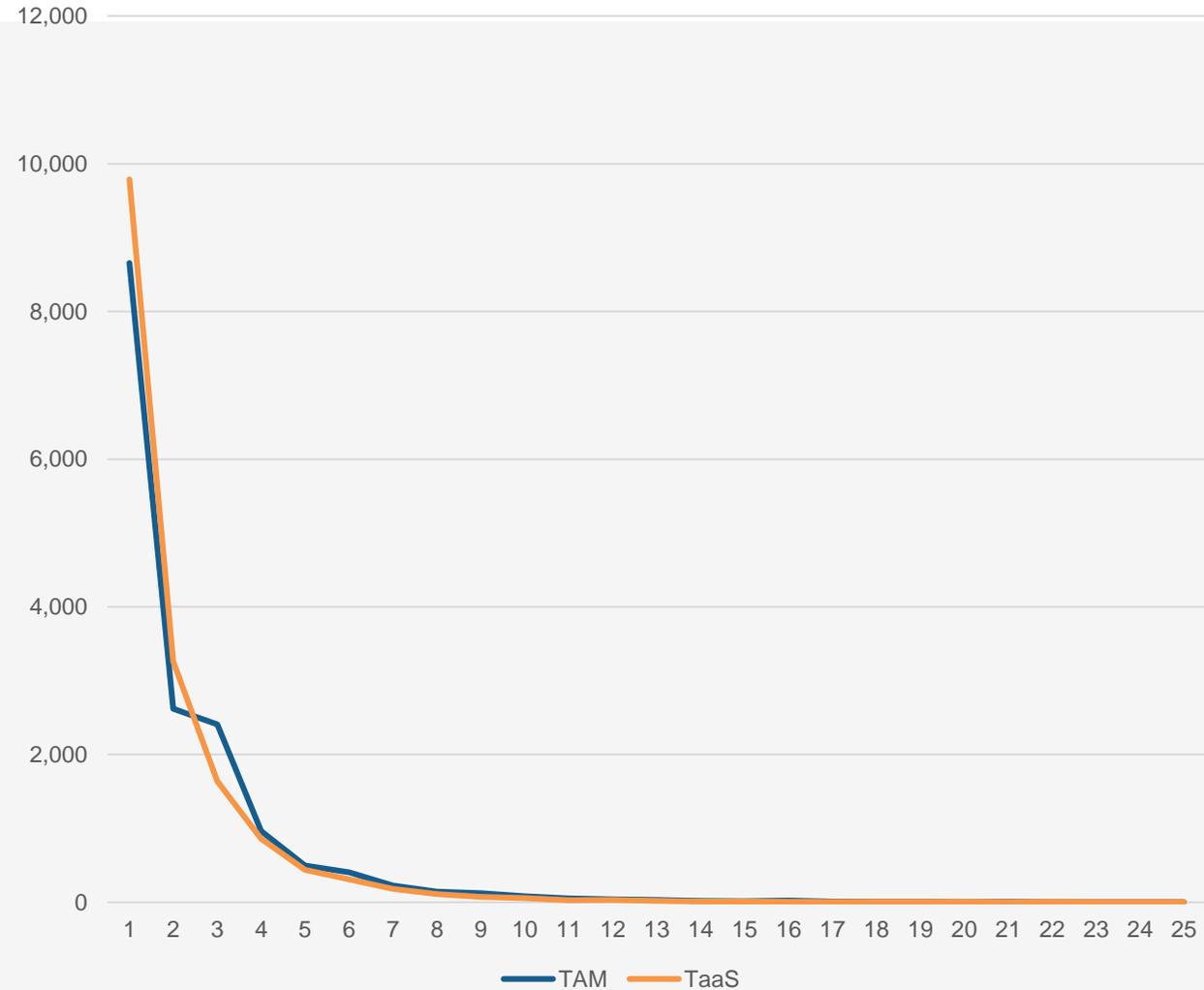


Average Charlson Comorbidity Index



How Frequently Did Patients Use Telemedicine?

- 11.42% of the patients in the dataset used telemedicine at some point
- Most used telemedicine services a few times: about 80% of the patients in EBRI's Telemedicine Database used either TaaS or TAM visits 6 or fewer times
 - Patients who visited more frequently exist, but are rare - there was one person who used TaaS 69 times between 2016 and 2020!



What Care Did Patients Seek?

- In general, patients sought different types of care via TaaS and TAM than they did via face-to-face visits
- Respiratory symptoms were the top issue for both TaaS and TAM visits, whereas musculoskeletal and connective tissue issues were the most common issues for patients seeking face-to-face care
- TaaS and TAM both were popular modes for the delivery of care for mental disorders

F2F Users	% of Visits	TaaS Users	% of Visits	TAM Users	% of Visits
Musculoskeletal, Connective Tissue	21.7%	Respiratory System	37.7%	Respiratory System	23.2%
Symptoms, Ill-Defined Conditions	13.4%	Symptoms, Ill-Defined Conditions	11.9%	Mental Disorders	12.9%
Respiratory System	7.9%	Nervous System, Sense Organs	9.7%	Symptoms, Ill-Defined Conditions	12.1%
Nervous System, Sense Organs	7.7%	Genitourinary System	7.8%	Nervous System, Sense Organs	8.8%
Endocrine, Nutrition, Metabolic	7.5%	Infectious and Parasitic	5.9%	Musculoskeletal, Connective Tissue	5.8%
Genitourinary System	6.3%	Mental Disorders	5.4%	Endocrine, Nutrition, Metabolic	5.8%

What makes a Visit a Telemedicine Visit?

- When modeling the modality of care as a function of age, sex, various health conditions, etc;

Variable	TaaS Visit	TAM Visit
Older patient	No practical difference	No practical difference
Woman	<i>Slightly increases likelihood</i> of TaaS visit	<i>Slightly increases likelihood</i> of TAM visit
Named Policyholder	<i>Slightly increases likelihood</i> of TaaS visit	<i>Slightly increases likelihood</i> of TAM visit
Charlson Comorbidity Index	<i>Slightly Decreases likelihood</i> of TaaS visit	<i>Slightly Decreases likelihood</i> of TAM visit
Seeking respiratory care	<i>Significantly Increases likelihood</i> of TaaS visit	<i>Increases likelihood</i> of TAM visit
Seeking mental health care	<i>Slightly increases likelihood</i> of TaaS visit	<i>Increases likelihood</i> of TAM visit
Most other care	<i>Decreases likelihood</i> of TaaS visit	<i>Decreases likelihood</i> of TAM visit
Care sought during COVID-19 pandemic	<i>Increases likelihood</i> of TaaS visit	<i>Significantly Increases likelihood</i> of TAM visit

Conclusion

- Employers who have implemented or are considering implementing a telemedicine platform should be aware that it tends to attract patients who are seeking care for acute, low-intensity and often self-limited needs
- The growth of TAM indicates that at least some employees are willing to seek care for chronic conditions via telemedicine
 - Also, at least some employees are willing to seek care for mental health issues via both TaaS and TAM
- Named policyholders are more likely to seek care via telemedicine than their covered spouses or dependents
 - This could indicate a knowledge gap, where people covered by the main policyholder's plan are unaware that they too are able to take advantage of telemedicine services

About the ATA

We have the unique perspective of understanding the continuum of needs and possibilities across the market, as our members represent the full gamut of telehealth providers.

Our Vision

We're here to ensure that people get care where and when they need it, and when they do, they know it is safe, effective and appropriate while enabling clinicians to do more good for more people

American Psychological Association @APA · 2h

Even in non-pandemic times, telehealth allows mental health providers to reach more people, including those who are geographically isolated or lack

← #TelehealthIsHealth

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How well is telepsychology working?
Researchers pinpoint what we know—and what we need to learn—about telepsychology treatment options.
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MDA USA @MDAorg · Sep 20

This September, #MDA is proud to join @americantelemed in highlighting the important role #telehealth now plays in the delivery of healthcare services during the inaugural #TelehealthAwarenessWeek. Learn more: bit.ly/3gbf7op #TelehealthIsHealth #TelehealthAwareness

Philips News @PhilipsPR · 10h

It's #TelehealthAwarenessWeek. @Philips examines why activating hospital-level care at home benefits patients, providers, and can help to lower cost of care. to.philips/6012yCiVG #TelehealthIsHealth @AmericanTelemed



2 10

MeMD @MeMDme · Sep 16

Telehealth Awareness Week is coming! Next week we'll be shedding light on recent trends, issues & stats related to telehealth. What would you like to know more about when it comes to #telehealth?

#telehealthishealth #telehealthawareness @AmericanTelemed @Walmart

ALS Association MN/ND/SD Chapter @ALSA_MNNDSD · 8h

Sarah has been living with ALS since 2019, but the past year and a half has been especially tough. Hear how Sarah and her family have navigated the pandemic with the help of telehealth, technology, and a healthy dose of positivity. ow.ly/CPHc50Gc7Qt #TelehealthAwareness

NORD @RareDiseases · Sep 19

#Telehealth has played a critical role in expanding access to healthcare services during #COVID19 and beyond. This #TelehealthAwarenessWeek, we're joining @americantelemed in sharing the message that #TelehealthIsHealth. Learn more: bit.ly/3gbf7op



September 19-25, 2021
TELEHEALTH AWARENESS WEEK ata

BlueJeans by Verizon @BlueJeansNet · 6h

This September, BlueJeans is proud to join @americantelemed in highlighting the important role of #telehealth in delivering #healthcare services during the inaugural #TelehealthAwarenessWeek. Learn more: bit.ly/3gbf7op #TelehealthIsHealth #TelehealthAwareness



PROUD SUPPORTER
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Telehealth. Is. Health. September 19-25, 2021
TELEHEALTH AWARENESS WEEK ata

Joe Morelle @RepJoeMorelle · 11h

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I SUPPORT
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Q&A



Upcoming Events

Wednesday, October 6 — Members Only
Research Round-Up

December 6, 7, and 9 — Winter Policy
Forum Webinars



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