



Telemedicine

Mower's Healthcare Specialty Group conducted an online survey of 836 American parents and adults without children in Q4 2019 to gauge their awareness, perception, understanding and usage of telemedicine.

Awareness of telemedicine **among parents** is high (68%), as is willingness to try it in the future (71%), but actual usage is very low (19%). **Lack of understanding about how to access telemedicine** was the most cited reason for not using it (63%).



Similarly, awareness of telemedicine **among the general population** is high (71%), though they are less likely to use it in the future (58%). Only 15% have actually used telemedicine. 72% of respondents cite **lack of understanding about how to access telemedicine** as the reason for not using it.



OUR TAKE-AWAY This awareness and willingness to try, combined with lack of understanding about how to access telemedicine, represents a great opportunity for providers and payers who are looking to increase usage of this channel. Help your members and patients understand what it takes to use telemedicine before they're in a situation that requires it.

GENERAL POPULATION

22%

very/extremely likely to use in future

MOMS

26%

very/extremely likely to use in future



DADS

38%

very/extremely likely to use in future

Dads are more willing than Moms to try and use telemedicine, for both themselves and their children.

OUR TAKE-AWAY Consider using imagery that includes Dads, as well as segmentation and targeting to present your messaging to these Dads who are more inclined to use telemedicine.

Telemedicine is perceived as valuable mainly for its convenience factor.

Top 3 values of telemedicine:

53% THINK IT'S CONVENIENT

44% LIKE THAT THEY DON'T HAVE TO TRAVEL FAR TO GET TO A DOCTOR

42% LIKE THAT THERE'S LESS WAIT TIME

OUR TAKE-AWAY Emphasizing convenience, and also delivering on it, is the way to get people's attention about telemedicine.

Top five scenarios when people would use telemedicine:

43% IN YOUR HOME DURING SEVERE WEATHER

25% WHILE ON VACATION

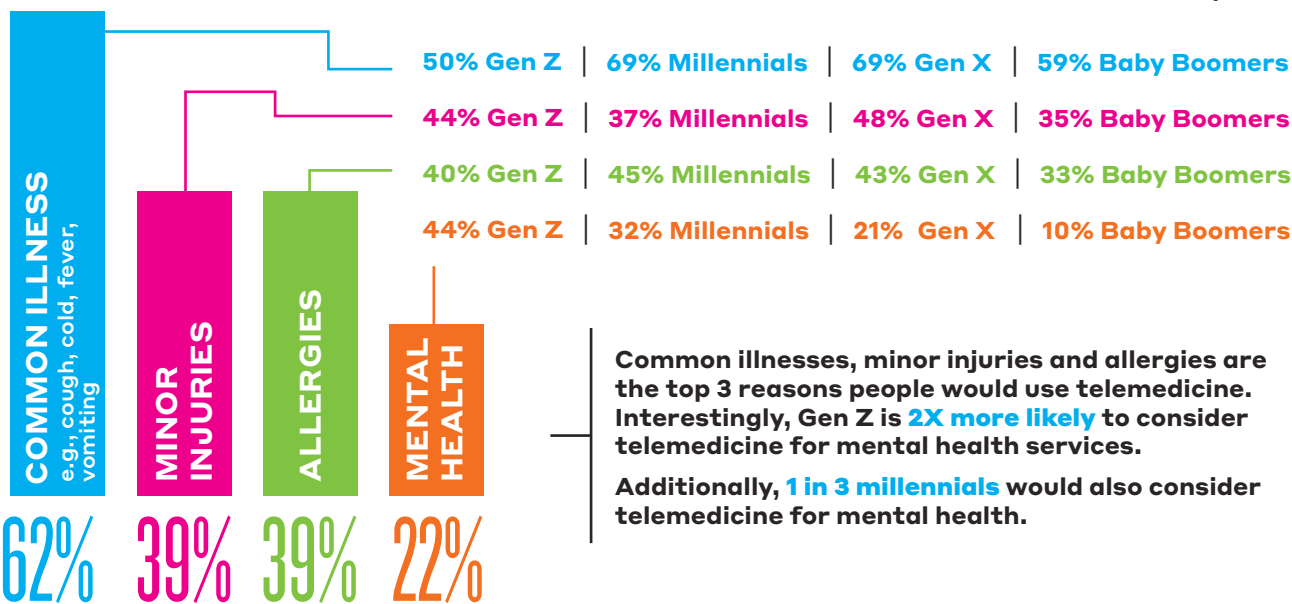
23% DURING A HOLIDAY

24% IN THE MIDDLE OF THE NIGHT

22% IN THE EVENING (5PM-10PM)

OUR TAKE-AWAY Select imagery, targeting and seasonal timing to create relevant messages that promote the use of telemedicine.

USES FOR TELEMEDICINE



Common illnesses, minor injuries and allergies are the top 3 reasons people would use telemedicine. Interestingly, Gen Z is **2X more likely** to consider telemedicine for mental health services. Additionally, **1 in 3 millennials** would also consider telemedicine for mental health.

OUR TAKE-AWAY Today's mental health landscape is primed to offer solutions to those struggling with mental health via alternative channels. According to the American Psychological Association's latest *Stress in America™* survey, 27% of Gen Z report their mental health as fair or poor (compared to 15% of millennials and 13% of Gen Xers). Additionally, 37% of Gen Z and 35% of millennials report they have received treatment or therapy from a mental health professional. With this need on the rise, the problem is compounded by a shortage of mental health professionals, with many aging out of the field quicker than they are being replaced by younger professionals.