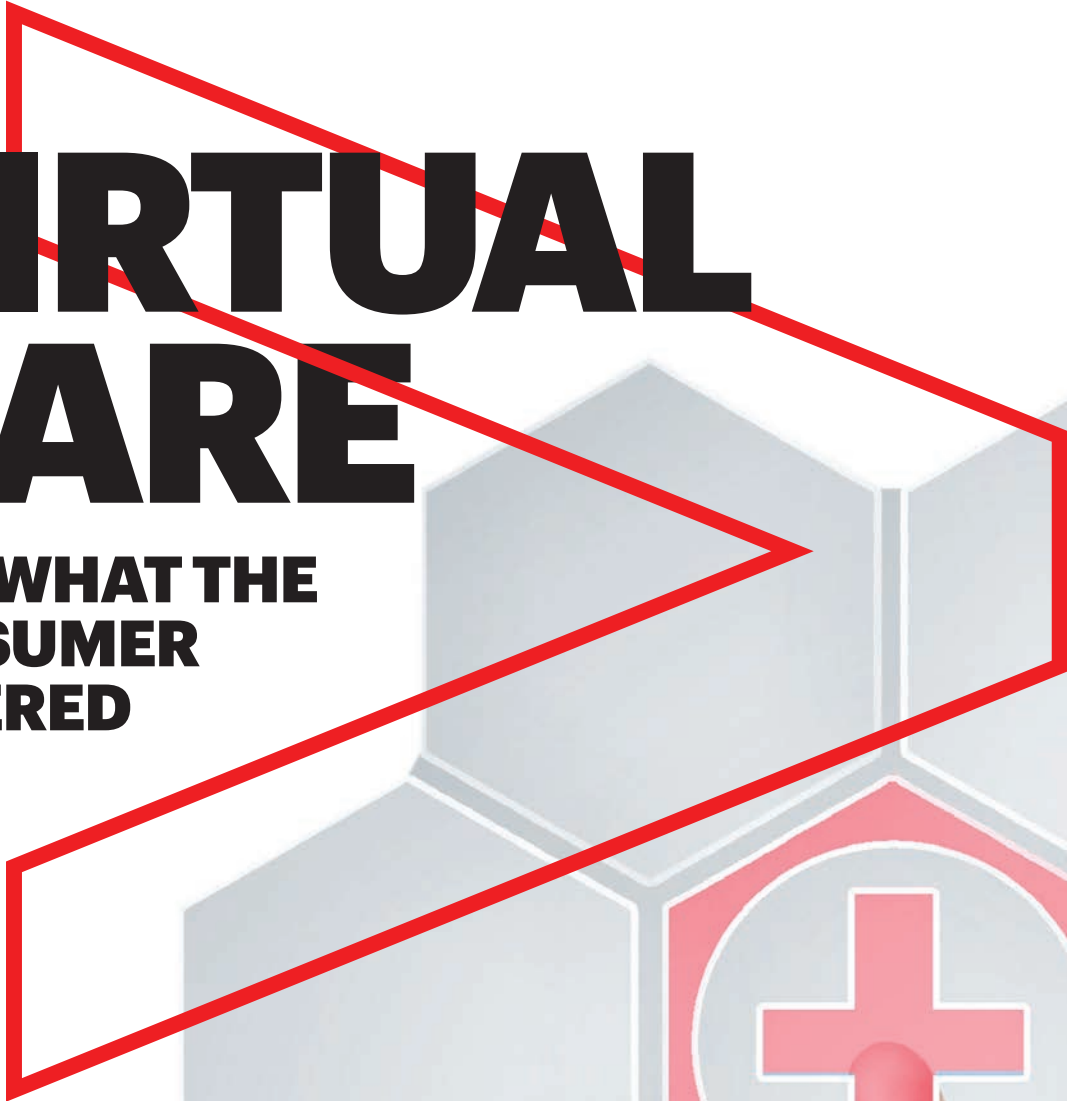


VIRTUAL CARE

JUST WHAT THE CONSUMER ORDERED



While the healthcare industry prioritized one type of convenient care, consumer expectations raced ahead—and those expectations are largely unmet. Approximately 70 percent of all consumers are interested in receiving a range of health and care services virtually, yet only 20 percent have experienced virtual healthcare.¹



**AS A RESULT, THERE IS A
\$10 TRILLION
OPPORTUNITY ON THE TABLE.**

Consumer expectations for convenient healthcare are fast evolving. While the healthcare industry focused on expanding retail and urgent care—more locations with extended hours—consumers kept searching for a different kind of convenience.

Today, care can come to consumers wherever they are, whenever they want. Experiencing flu symptoms? Have a late-night teleconsult and avoid waiting until the next day. Scheduled for a post-procedure follow-up visit? Have the consultation via video from home. Having trouble remembering when to take your medication? No need to consult your calendar—a secure text message will remind you. Consumers are ready and waiting.

People want to move full speed ahead into the era of virtual care, but the healthcare industry has yet to catch up. The untapped opportunity is the more than \$10 trillion market potential for ambulatory virtual care.²

The question before the industry is this: which healthcare organizations will move quickly to take advantage of the opportunity?



VIRTUAL CARE

The ability to get healthcare services and support to remain healthy, diagnose or treat an illness, or manage an on-going condition, regardless of location or time of day.

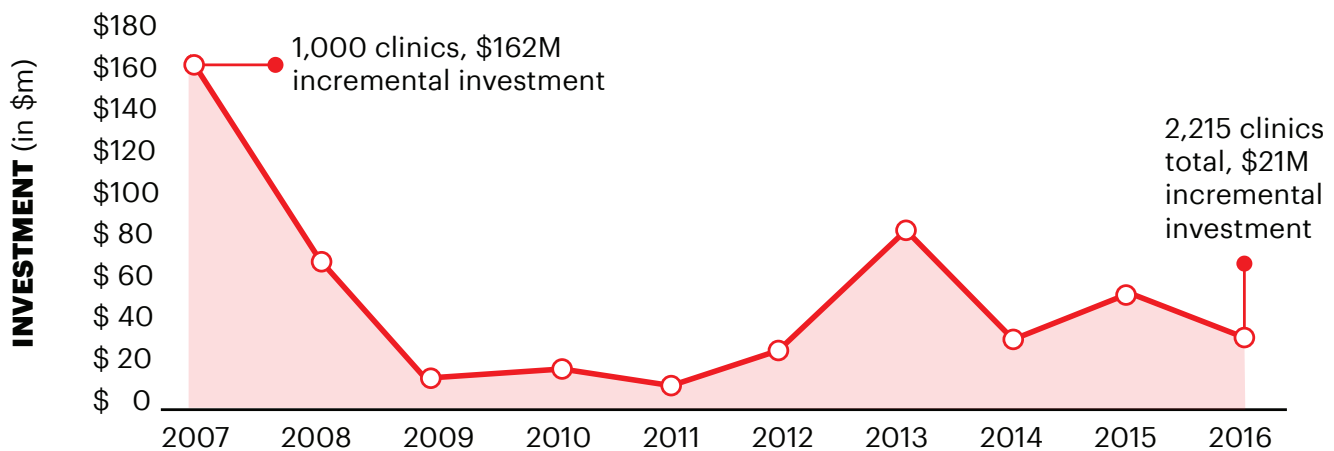
TEMPORARY TRIAGE

There have been two primary responses to consumers' desire for convenient care, both brick and mortar solutions: more retail clinics and urgent care centers. Both are falling short. Urgent care center utilization is dropping, and investment in retail clinics is declining. The Urgent Care Association of America reported that average visits per site dropped from 14,000 to 12,000 between 2014 and 2016.³ Similarly, annual investment in retail clinics shrank from \$160 million in 2007 to \$29 million in 2016.⁴ (Figure 1).

EVEN 60% of those who haven't yet experienced virtual care are interested in virtual care options.⁵

FIGURE 1 | Investment in retail clinics is plummeting.

Source: Market Research, "Retail Clinics", 2016, AHIP, "Retail Health Clinics", July 2016, Convenient Care, "Growth and Staffing Trends in Urgent Care and Retail Medicine", 2015, Investment spend calculations determined by incremental retail health clinics by year x the average investment



A likely reason contributing to the peak and decline is that more location-based options are only part of the answer. Closer locations and extended hours only partially meet the need, especially when they offer limited services for one-time needs such as immunizations or consultations for infections. Virtual care offers what consumers really want: a variety of health and care services available to any location at any time, crossing the spectrum from health and wellness to episodic injury and illness to ongoing condition management. Retail clinics and urgent care provide a place for ad-hoc low-acuity care, but not a platform for a full suite of care services.

VIRTUAL CARE TAKES CONVENIENCE TO **A NEW LEVEL**

Virtual care brings a wide range of healthcare services to consumers, independent of physical location. Services can include clinical encounters, tracking health status, reminders to take medication, mental health services and more. An extensive selection of technologies including remote monitoring via digital devices such as glucometers and pulse oximeters, mobile applications, secure social platforms, secure messaging via email or text, and live video—allow care delivery anytime, anywhere.

Consumers get the convenience of around-the-clock care delivered on their terms, and a wider range of services when they are healthy, temporarily ill or injured, or managing an ongoing condition. In addition, virtual makes it easier for people to be actively involved in their own health and care. Wearable technologies can track physical activity, sleep patterns, vital signs and balance. Online support groups connect consumers with others facing similar health challenges.

Unlike in-person care, virtual care can scale affordably. For example, secure text messaging can reach thousands of people effectively. Another example is behavioral and mental health services where roughly 90 percent of care and support can be delivered virtually. And, innovation with self-care, such as online cognitive behavioral therapy, video-based group therapy and secure social network mental health support groups, can reduce the amount of time needed with behavioral health professionals while achieving improved mental health for patients.

EXPANDING VIRTUAL CARE AVAILABILITY—PAYERS LEAD THE WAY

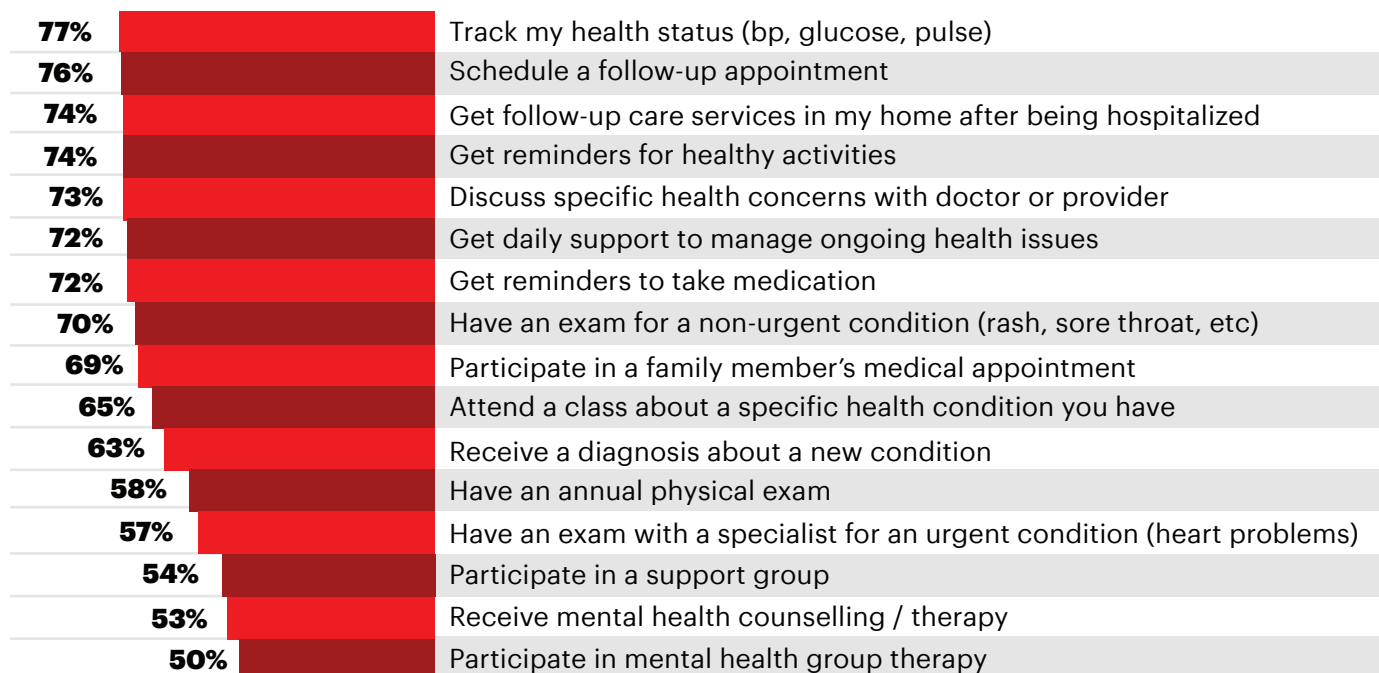
United Healthcare expanded its services to include virtual visits, allowing members to connect with physicians via their computer, device or mobile phone to get a diagnosis or prescription for minor medical needs.⁶

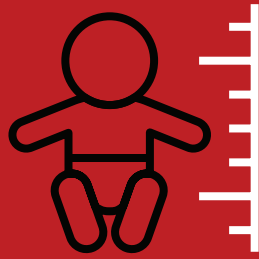
CONSUMERS ARE TAKING CHARGE

Consumers see themselves as the primary decision-maker for health needs. In fact, 85 percent of consumers said they decide when, where and how to receive health and care services. Meeting consumer expectations is critical. The unique combination of services available through virtual care delivers on consumer expectations, along with the added convenience consumers want. Among those consumers who have received care virtually, convenience was the top reason for choosing virtual care over traditional, in-person health services.⁷

Leading health systems are taking note. Kaiser Permanente has invested in IT to enable the transition from physical to virtual visits. Now, more than half of Kaiser’s physician/member interactions are virtual—totaling more than 100 million encounters.⁸ Health systems are well positioned to offer virtual services, but it’s uncommon for any one organization to offer a full range of virtual care options (see Figure 2).

FIGURE 2 | Virtual healthcare services consumers would “probably” or “definitely” use.
Source: Accenture 2017 Consumer Survey on Virtual Health





COST-EFFECTIVE SERVICES AT SCALE—SUPPORTING HEALTHY PREGNANCIES AND BABIES

Text4baby is a free mobile health solution that shares valuable resources for pregnant women and new moms via automated secure messages—from prenatal appointment reminders to expert advice on feeding, sleeping and baby milestones. In its first year of service, the program supported more than 135,000 women.⁹

HEALTHCARE CONSUMERS THINK CONVENIENCE IS **GOOD MEDICINE**

Consumers want the best of both in-person and virtual care and the ability to choose which type whenever they want. Health systems and payers must respond by reimagining ambulatory care and experimenting with integrated in-person and virtual services. Only then will healthcare organizations provide consumer-centric care that meets consumer expectations.

The following actions can help your organization begin to initiate or accelerate virtual care services consumers are seeking:



1. PURSUE QUICK WINS TO PROTECT AGAINST DISRUPTION. Some of the easier to implement services can include eVisits—asynchronous secure-message based encounters between patient and physicians. Other first-phase options can be virtual mental health services and automated reminders (for appointments, medications and more) to support care plan compliance. At the same time, workflow redesign and change management will be needed to help clinicians adapt to and adopt these new virtual models.



2. OFFER A FULL PORTFOLIO OF CHOICES THAT APPEAL TO THE NEXT-GENERATION CONSUMER. With foundational services in place, organizations can move to establish a full range of ambulatory care services including live clinical consultations, remote monitoring of those with chronic conditions, post-discharge follow up and even in-home therapies. These services should be accessible to consumers who are healthy, temporarily ill and injured, or those with ongoing health issues.



3. REIMAGINE AND REINVENT THE AMBULATORY CARE MODEL. Clinicians aren't the only caregivers. It's time to think beyond the traditional medical model of care. Family and friends are key participants in health decision-making and support of clinical care. Half of consumers surveyed say a family member is involved with their health and healthcare.¹⁰ Virtual approaches enable family, friends and other non-clinical caregivers to be part of clinical encounters, and the support of family and friends over time.

Integrated health services that combine virtual and physical care are the answer to reinvent health and care services. Now is the time to adopt this new model so that healthcare can flexibly adapt to continually evolving consumer expectations. **THE QUESTION BEFORE THE INDUSTRY IS: HOW QUICKLY WILL HEALTHCARE ORGANIZATIONS MOVE TO TAKE ADVANTAGE OF THE OPPORTUNITY, AND WHO WILL LEAD THE WAY?**

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NOTES

1 Accenture 2017 Health Consumer Survey

2 According to Accenture analysis of CDC data coupled with financial modeling and client benchmarks.

3 Urgent Care Association of America Benchmarking Report Summary 2016 and 2014; <http://c.ymcdn.com/sites/www.ucaoa.org/resource/resmgr/benchmarking/2016BenchmarkReport.pdf>

4 Ibid

5 Source: Accenture 2017 Health Consumer Survey

6 Source: <https://www.uhc.com/individual-and-family/member-resources/health-care-tools/virtual-visits>

7 Ibid

8 “Kaiser Permanente chief says members are flocking to virtual visits,” Modern Healthcare; April 22, 2017

9 Source: <https://opinionator.blogs.nytimes.com/2011/02/07/pregnant-mothers-are-getting-the-message/#>

10 Ibid

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