

Telehealth's Evolution: Navigating Through a Pandemic and Beyond





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About the Study

In February 2024, Sogolytics conducted a survey to delve into the telehealth landscape, engaging with 1075 participants through a series of focused questions. The intent was to understand how telehealth has been adopted during different stages of the pandemic. **The aim was to figure out how telehealth fits into everyday health care and what patients think about using it compared to traditional, in-person visits.** Additionally, the study sought to pinpoint the factors encouraging or hindering the use of telehealth, as well as what patients see as the good points and the not-so-good points of using it. The results are meant to help healthcare providers improve how telehealth services are used and offered.



Historical Perspective on Telehealth

Though popularized recently, telehealth has roots dating back to the early 20th century, with [radio consultations in the 1920s](#). However, its modern evolution accelerated in the 1970s, as advanced telecommunication and information technologies began transforming healthcare systems. The current state of telehealth represents an accumulation of efforts over the decades, showing that telehealth has a rich history and is not simply a contemporary invention.



Evolution During COVID-19

The COVID-19 pandemic was a turning point for telehealth, transforming it from a convenience into a necessity. With lockdowns and social distancing mandates, the Centers for Disease Control and Prevention (CDC) reported a [50% increase in telehealth visits in early 2020](#) compared to the previous year. This surge was [further amplified by relaxed regulatory barriers](#), which broadened the scope and accessibility of telehealth services.

This research offers a continued exploration of telehealth's trajectory in 2024. The focus is placed on user satisfaction, analyzing the underlying factors that contribute to patients' approval or disapproval of telehealth services. Identifying and understanding the persistent barriers to telehealth adoption are crucial for informing the dialogue between telehealth and traditional in-person consultations, ultimately aiming to enhance both healthcare delivery systems and patient experience.



Findings

Telehealth Adoption Through the Phases of COVID-19

Survey results echoed CDC findings, showing a clear trend in when people started using telehealth in relation to the COVID-19 pandemic. Up to March 2020, prior to the pandemic, only about **20%** of those surveyed had tried telehealth. During the pandemic, from March 2020 to June 2021, **51%** of those surveyed tried telehealth for the first time. The remaining portion of those surveyed who had tried telehealth, **29%** used it for the first time after the pandemic, sometime from July 2021 to the present. While it's important to note that this question asked only about first time use of telehealth, it's clear that new usage was not limited only to the pandemic time period.

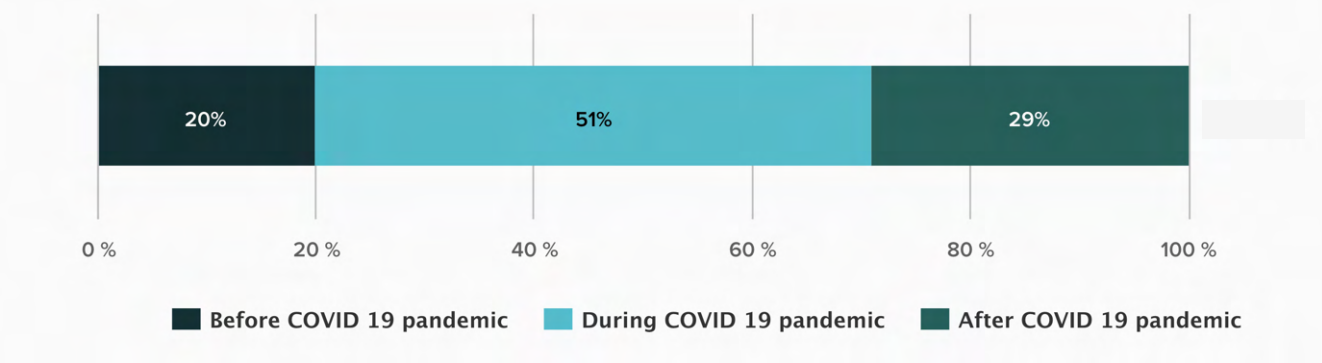


Figure 1: Shift in New Telehealth Patients Pre-, During, and Post-COVID-19 Pandemic



Factors Influencing the Rise of Telehealth

The main factors that prompted survey participants to initially explore telehealth options varied across the different stages of the COVID-19 pandemic. Before the pandemic, the primary reasons included the convenience of accessing care from diverse locations—be it home, office, or while on the move—and the flexibility telehealth offered in scheduling appointments as seen in Figure 2. As the pandemic emerged, the focus sharply pivoted towards COVID-19-related concerns, driving many to adopt telehealth for the first time. During the height of the pandemic, **the value of telehealth was underscored by its capacity to provide prompt medical advice or prescriptions in emergencies and its promise of reduced wait times compared to traditional in-person visits**. Post-pandemic, while the flexibility in scheduling remained a constant benefit, the expedited access to care continued to be a crucial advantage, indicating a sustained reliance on the practicality and immediacy that telehealth provides.

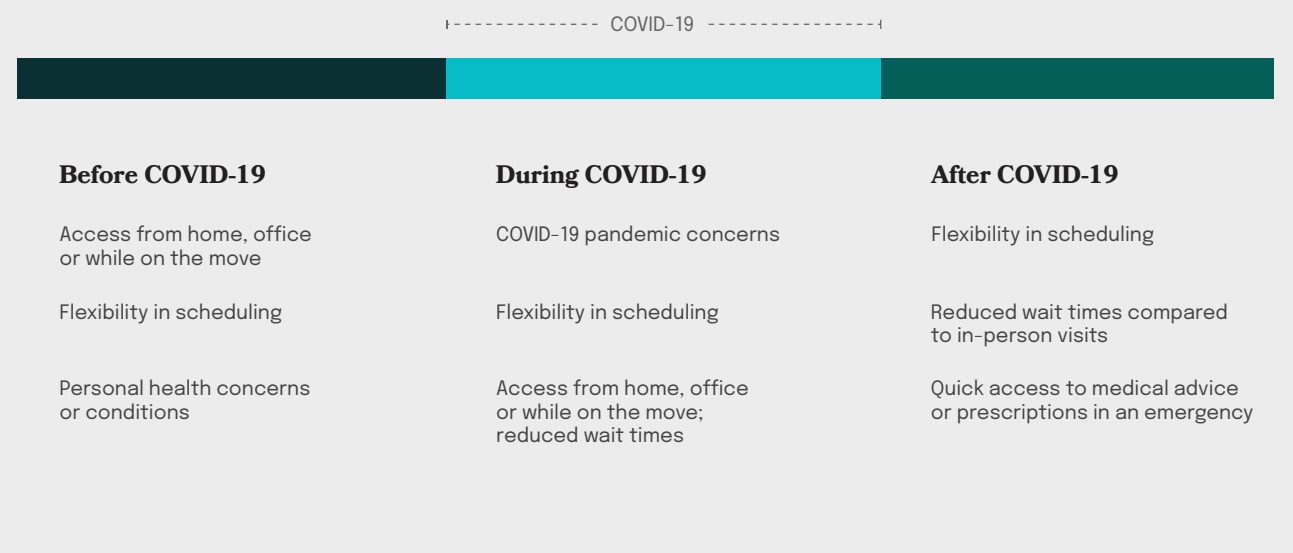


Figure 2: Top Factors Influencing New Patients to Adopt Telehealth Pre-During-Post COVID-19 Pandemic



Patient Satisfaction: The Scorecard of Telehealth

4%
Dissatisfied

12%
Neutral

31%
Somewhat Satisfied

53%
Very Satisfied

The survey results indicate high patient satisfaction with overall telehealth experience: 53% were ‘Very Satisfied’ and 31% ‘Somewhat Satisfied,’ as seen in Figure 3. Only 4% reported dissatisfaction, and 12% were neutral. With **84% of respondents indicating satisfaction**, it’s clear that telehealth services are generally well received.

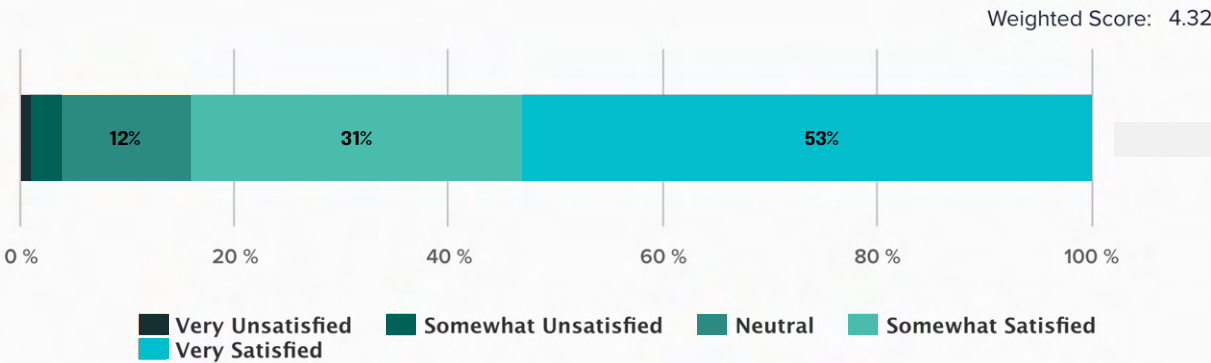


Figure 3: Patient Satisfaction Levels with Telehealth Services

Sustained Usage: Beyond the First Appointment

75%
Continued telehealth services

25%
Discontinued telehealth services

Complementing this sentiment, 75% of participants have continued to engage with telehealth services after their first appointment as seen in Figure 4, reflecting a strong pattern in both the satisfaction and sustained use of telehealth.

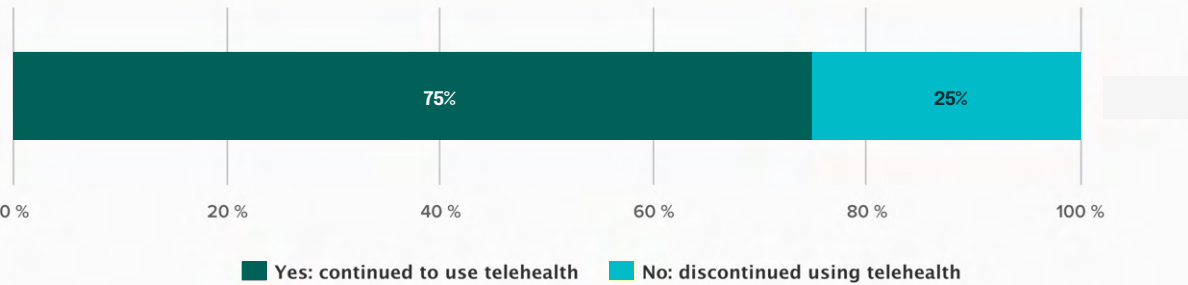


Figure 4: Continuation Rates for Telehealth Post-Initial Use



Service Spectrum: The Diversity of Telehealth Applications

When asked about their preference for routine or follow-up appointments, 61% of participants favored *virtual consultations* over *in-office visits*, which were preferred by 39% which can be seen in Figure 5. Building on the trend of sustained usage, as seen in Figure 6 **the primary services for which telehealth is utilized include *follow-up appointments, prescription refills or management, mental health support or therapy, health screenings, and initial consultations with healthcare providers.***

This variety in services underscores the versatility and broad applicability of telehealth in meeting a range of patient needs.

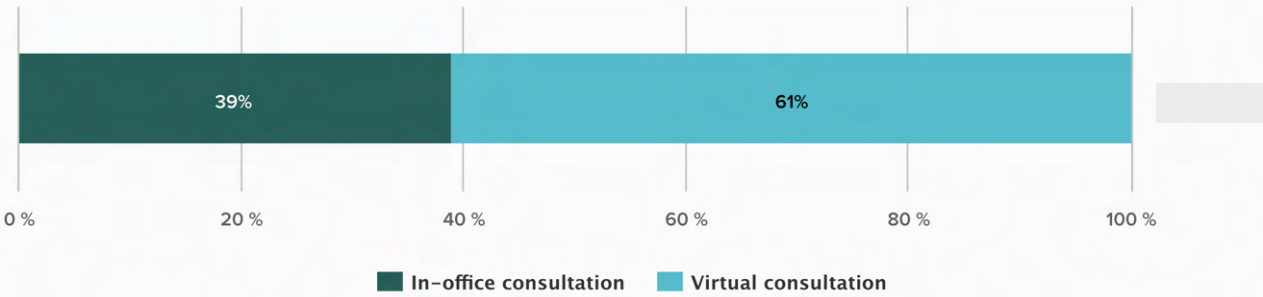


Figure 5: Patient Preferences for Consultation Type: In-office vs. Virtual

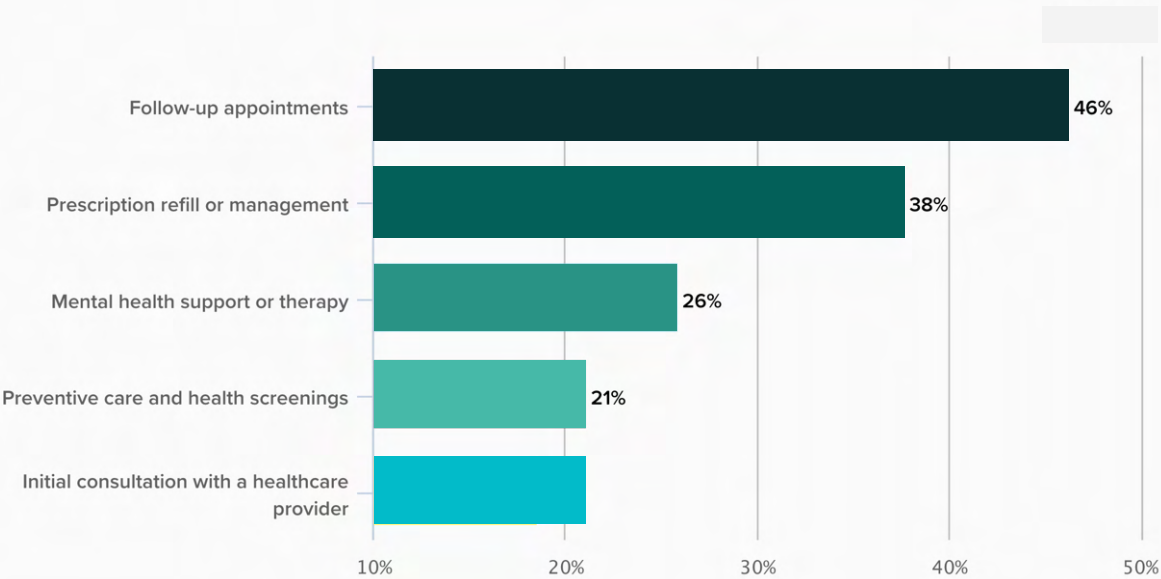


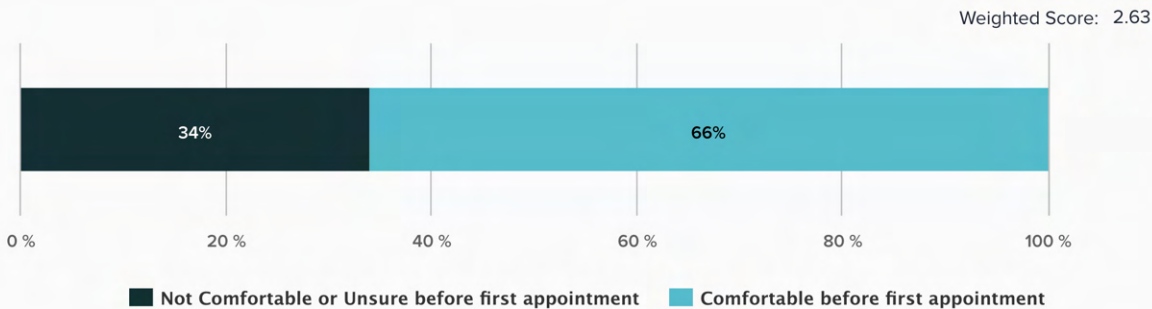
Figure 6: Preferred Telehealth Services by Patients



Patient Comfort and Confidence in Telehealth

Once individuals get started with telehealth, results show that they quickly become more comfortable. **Initially, 34% of individuals expressed uncertainty or discomfort with telehealth, but of these, 68% have since become more comfortable.** They attribute this to gaining familiarity and understanding what to expect, with comments like, "Because I now feel comfortable and know what to expect," "It's so easy to be seen online rather than have to wait for an appointment," "Once I knew what to expect I was more at ease," and "I understand the camera a lot more now." However, the 32% who remain unsure often mention a preference for more personal, in-person interactions, saying "not as personable" and "I prefer in person appointments" as reasons for their continued hesitation. They voice a desire for the more personal touch of in-person visits, underscoring ongoing areas for telehealth enhancement and patient education to bolster acceptance and comfort further.

How comfortable did you feel before your first telehealth appointment?



On a scale from 1 to 3, please rate how your comfort level with the telehealth service has changed over time.

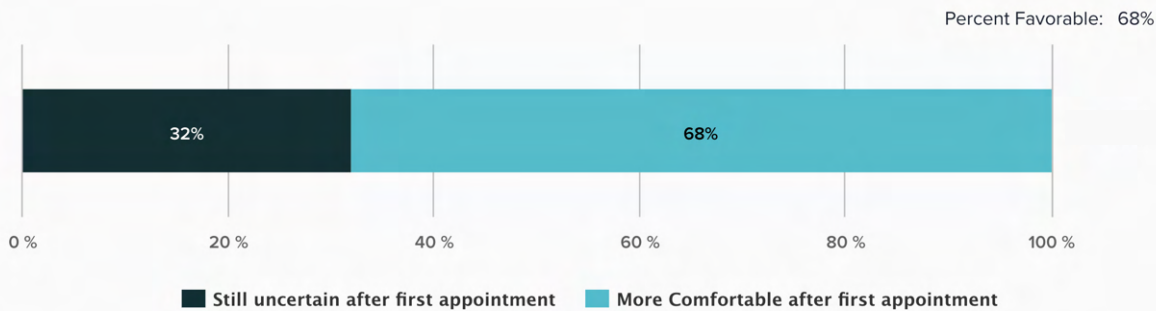


Figure 7a: Patient Voices: Real Experiences with Telehealth Adoption and Usage



Telehealth Adoption Drivers: Demographic Insights and COVID-19 Impact

While COVID-19 served as a critical catalyst in accelerating telehealth adoption, the updated insights reveal that its benefits, as identified across different age groups, continue to drive telehealth utilization even beyond the pandemic context, highlighting its enduring appeal and versatility in addressing diverse healthcare needs.

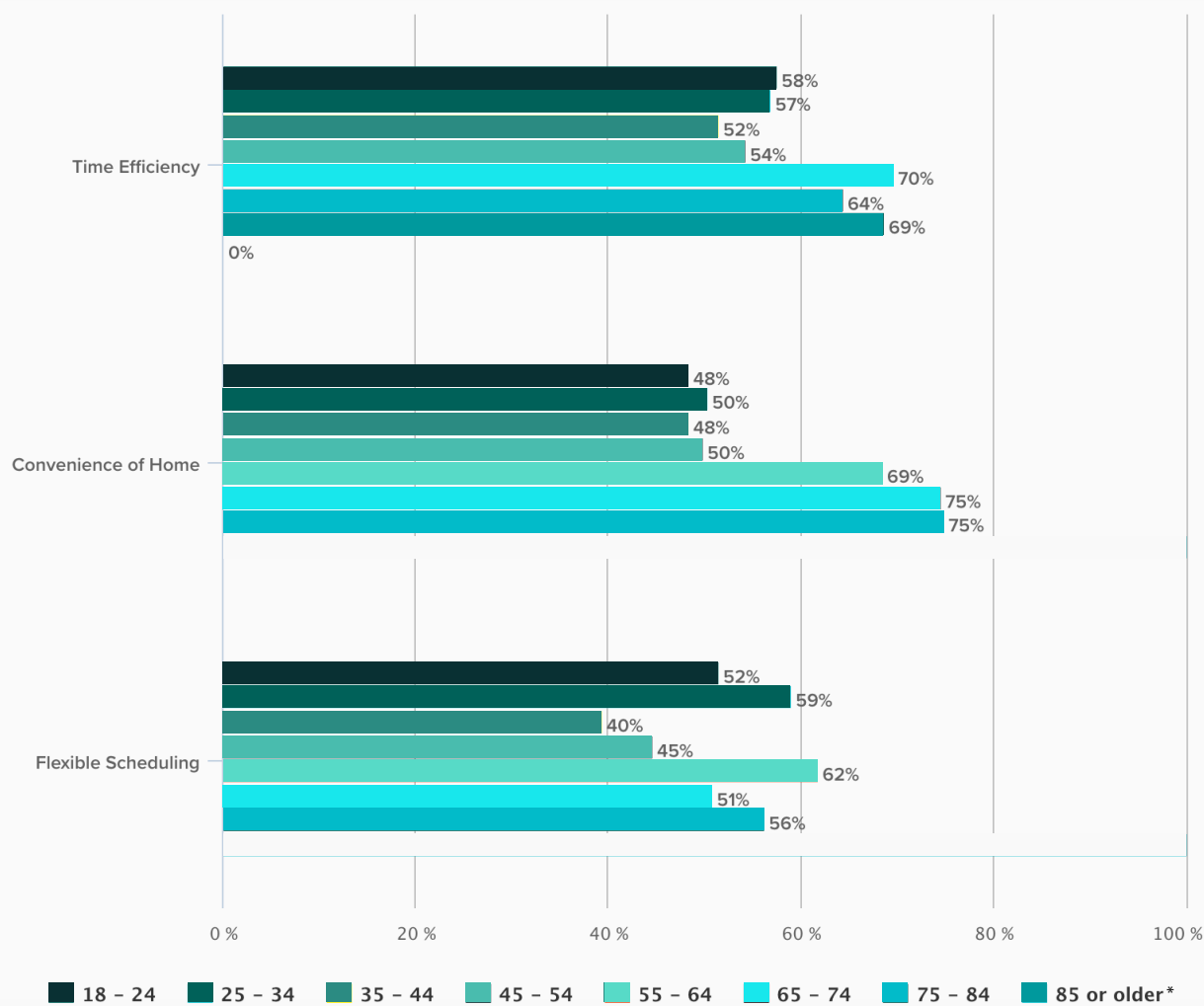


Figure 8: Patient Preferences for Consultation Type: In-office vs. Virtual

* Not enough data



Here's how different age groups have perceived the benefits of telehealth (Figure 8):

1. **Convenience of Accessing Care from Home:** The convenience of home access remained important across all ages and was particularly accentuated during the COVID-19 pandemic. This benefit was especially highlighted by older groups: 68% of those aged 55-64, 74% of those 65-74, 75% of those 75-84, and all individuals aged 85 or older found this aspect crucial, emphasizing telehealth's value in providing care without the need to travel.
2. **Time efficiency:** Time-saving was a significant benefit across all demographics, noted by 58% in the 18-24, 57% in the 25-34 age brackets and 70% of those aged 55-64. The pandemic underscored this advantage as patients sought to minimize disruptions to their daily lives while accessing necessary healthcare.
3. **Flexible Scheduling:** Appreciated most by the 25-34 (59%) and 55-64 (62%) age groups, flexible scheduling illustrates how telehealth has offered adaptable healthcare solutions, particularly valuable during the unpredictability brought on by the pandemic.
4. **Follow-up Ease:** Across age groups, with 51% of those aged 45-54 and 57% of those 55-64 valuing it the most, this benefit signifies telehealth's role in streamlining the continuity of care, a necessity that became more evident during the health crisis.
5. **Quick Access to Care:** Especially valued by the 25-34 (51%) and 35-44 (48%) demographics, quick access reflects the urgent need for efficient healthcare delivery that the pandemic highlighted, appealing particularly to younger and middle-aged adults.
6. **Reduced Exposure to Illnesses:** With the pandemic heightening awareness of infection risks, this benefit became crucial, particularly for older age groups, evidenced by 43% of those aged 55-64 and almost half in the 65-74 and 75-84 brackets valuing reduced exposure.
7. **Mental Health Support:** Acknowledged by 45% of the 18-24 and 40% of the 35-44 age brackets, this benefit shows a growing recognition of telehealth's role in providing mental health support, an area of increased focus during and after the pandemic.



Identifying Obstacles

While telehealth has seen significant uptake, it's important to acknowledge the barriers that have prevented a portion of users from continuing its use. According to the survey, **25% of individuals who tried telehealth chose not to use it again**, with their reasons providing insight into the various obstacles that telehealth adoption faces (Figure 9):

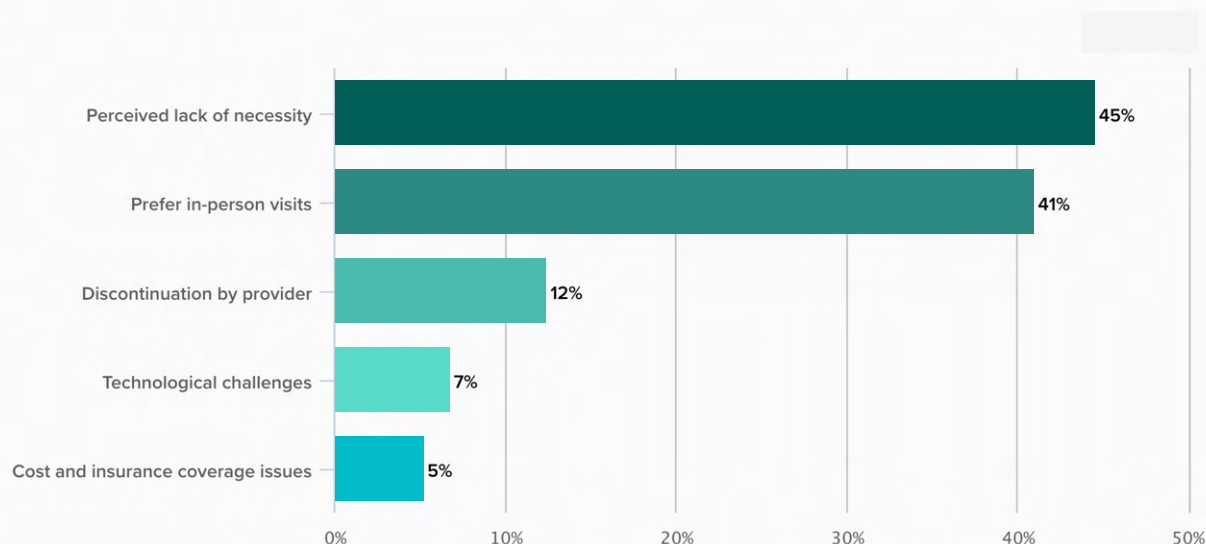


Figure 9: Key Barriers Leading to Telehealth Discontinuation

- 1. Perceived Lack of Necessity:** Some respondents mentioned they did not feel the need to use telehealth services again. This could indicate that their initial use was driven by situational factors that no longer apply, suggesting a need for ongoing education about the benefits and applicability of telehealth in various healthcare scenarios.
- 2. Preference for In-Person Visits:** A significant number of users still prefer traditional face-to-face interactions with healthcare providers. This preference underscores the importance of ensuring telehealth services complement rather than replace in-person care, maintaining a hybrid model that respects patient preferences.
- 3. Discontinuation by Providers:** For some, the option to use telehealth was no longer available as their healthcare providers discontinued offering these services post-pandemic. This highlights the necessity for sustained provider adoption and integration of telehealth into standard practice.
- 4. Technological Challenges:** Technical difficulties or lack of comfort with using telehealth platforms deterred some users from continuing. Addressing these issues through user-friendly technology design and providing support and education for patients can help mitigate this barrier.
- 5. Cost and Insurance Coverage Issues:** Insurance not covering cost for telehealth remains a barrier, pointing to the need for policy advocacy to ensure telehealth services are adequately funded and reimbursed across healthcare systems.

By understanding and addressing these obstacles, stakeholders can develop more targeted strategies to enhance telehealth adoption and ensure it remains a viable and accessible option for healthcare delivery.



Suggestions for Improvements

The feedback from participants offers a wealth of insights into potential enhancements that could elevate the telehealth experience. The feedback was analyzed and categorized to identify key areas for telehealth improvement.

The following outlines the main categories of enhancement based on participant responses, providing actionable insights for healthcare providers:

1. **Enhance Image and Connection Quality:** "Better image quality" and "stronger signal" suggest a need for clearer visuals and reliable connectivity, which are foundational to effective virtual care.
 2. **Simplify Technology Usage:** Addressing technical challenges, like "The doctor app is very complicated" indicates the importance of user-friendly platforms. "Having a hard time connecting and logging in" underlines the necessity for smoother access to telehealth portals.
 3. **Personalize the Experience:** Requests for "making it seem more personal" and ensuring "the doctor is not distracted" emphasize the need for a more engaging and focused patient-provider interaction.
 4. **Expand Service Accessibility:** "Waive the requirement for a webcam for low-income patients" and "making it more financially accessible" highlight the need for equitable access to telehealth services.
 5. **Improve Communication and Education:** Informing patients about available options, as suggested by "To let people know these options are available", and "teaching elderly patients how to use it" could foster broader adoption and comfort with telehealth.
- Integrate Artificial Intelligence:** Suggestions to "introduce artificial intelligence" indicate the potential for AI to streamline and enhance the telehealth process.
7. **Harmonize Platforms:** "It would be easier if all providers used a common platform" suggests that standardizing the telehealth platform could reduce confusion and enhance usability.
 8. **Cost and Insurance Coverage Issues:** Calls for "more transparency around security" and ensuring platforms have "better contact services" for privacy concerns stress the importance of safeguarding patient information.

By addressing these suggestions, healthcare providers can refine telehealth services to better meet patient needs and expectations, thereby reducing barriers to adoption and enhancing the overall user experience.

Suggestions for improvement



Conclusion

The journey of telehealth, as captured by this survey, showcases a remarkable evolution fueled by necessity, technological advancements, and changing patient preferences. The COVID-19 pandemic, while unprecedented, acted as a catalyst, accelerating telehealth's integration into mainstream healthcare and revealing its potential to address longstanding accessibility and efficiency challenges. As we move beyond the pandemic, the insights gleaned from users' experiences and feedback highlight telehealth's enduring value and the areas ripe for enhancement.

This report underlines the importance of telehealth in modern healthcare delivery, emphasizing its capacity to meet diverse patient needs while also identifying critical areas for improvement. The feedback from participants serves as a valuable guide for healthcare providers, suggesting a path towards a more patient-centric, accessible, and efficient healthcare system.

The ongoing adoption and refinement of telehealth services signifies a step towards a future where healthcare is more adaptable, inclusive, and responsive to the needs of all.

In conclusion, telehealth stands not just as a testament to healthcare innovation but as a beacon for future healthcare models. By embracing the lessons learned and addressing the barriers identified, the healthcare community can ensure that telehealth continues to evolve as an integral component of healthcare delivery, fostering a more connected, accessible, and patient-focused healthcare ecosystem.

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