

MEMORANDUM

TO: INTERESTED PARTIES
FROM: JARRETT LEWIS & BILL McINTURFF, PUBLIC OPINION STRATEGIES
CC: HIMES & HERS
DATE: JULY 12, 2022
SUBJECT: NATIONAL TELEHEALTH SURVEY KEY FINDINGS

ABOUT THE SURVEY

On behalf of Hims & Hers, Public Opinion Strategies conducted a national online survey of 1,301 adults. The survey included 712 telehealth users and 1,105 registered voters and was conducted February 13-17, 2022. Quotas were set for gender, region, age, ethnicity, and education. Modest weighting was also applied to these same variables upon completion of interviewing based on U.S. Census data. Since the sample was drawn from an opt-in panel sample rather than a random probability sample, a credibility interview is used for determining the accuracy of the data. Results from the survey have a credibility interval of $\pm 3.10\%$ percentage points.

KEY TAKEAWAYS

- Nearly six-in-ten Americans (58%) say access to medical care is a problem where they live.
- Telehealth has had explosive growth over the past three years. A majority of Americans (55%) have now had a telehealth visit, up from 10% in June 2019.
- Three-quarters of Americans (75%) would support legislation in their state to allow patients to use a secure messaging platform for a telehealth visit with a health care provider.
- More than two-thirds of Americans (69%) support legislation to expand patient access to asynchronous telehealth, compared to 31% who oppose.

SURVEY FINDINGS

1. Cost continues to be a significant barrier to Americans seeking medical care. And more than one-half of Americans report facing challenges with access to care and navigating the health care system.

- Nearly two-thirds (65%) of Americans say reducing health care costs like premiums and deductibles is one of their two most important health care issues – an increase from 52% who said the same a year ago. More than four-in-ten (41%) say they have delayed care in the last year because of cost.
- Nearly six-in-ten Americans (58%) say access to medical care is a problem where they live. Among underserved patient populations the numbers are even higher:
 - This is even more of an issue in communities of color. Black adults (64%) and Hispanic adults (61%) are more likely than white adults (57%) to say this.
- A majority of respondents (58%) say they have either been uncomfortable talking to a health care provider in their adult life about a medical issue or they have avoided care in the last few years because the health care system is too complicated (or both).
- Four-in-ten (40%) Americans live in a household where someone has skipped or delayed care in the past year because of the coronavirus pandemic.

2. Americans recognize the gravity of the mental health situation in America.

- A majority (55%) of Americans say they know someone who would benefit from receiving counseling or therapy from a mental or behavioral health professional but who is not currently receiving that care.
- Nearly six-in-ten Americans (59%) believe mental health issues are a very serious problem in the U.S., 91% overall believe mental health issues are a very or somewhat problem.

3. Telehealth utilization continues to rise.

- Fully 55% respondents have now had a telehealth visit, up from 10% in June 2019, 29% in April 2020, 43% in August 2020, and 51% in February 2021.¹
- Among those who have used telehealth, satisfaction remains consistently high. Fully 91% of those who have used telehealth say they were satisfied with their most recent visit – closely resembling the 89% of who said the same in 2021.
- The COVID-19 pandemic has expectedly driven the uptick of utilization, as 69% of telehealth users say they have used telehealth in 2020, 2021 or 2022, because the pandemic meant they could not see their doctor in person.
 - But telehealth users believe telehealth is here to stay. Fully three-quarters say they plan to continue using it once the pandemic is under control.
- More than two-thirds of Americans (68%) have either used telehealth and plan to continue using telehealth after the pandemic, or have not used telehealth but say they are likely to consider using it – an increase from 61% who fit into one of those two categories a year ago.

4. Americans are strongly in favor of expanding telehealth access.

- Three-quarters of Americans support legislation in their state to allow patients to use a secure messaging platform for a telehealth visit with a health care provider, a ten-point increase from 2021. Majorities of Republicans (73%) and Democrats (80%) support allowing patients to use a secure messaging platform for a telehealth visit.

5. Americans support policies that will expand asynchronous telehealth options.

- More than two-thirds (69%) of Americans support legislation to expand patient access to asynchronous telehealth. Majorities of Republicans (60%) and Democrats (77%) support this legislation.
- Hispanic adults (70%), Black adults (76%) and those with Medicaid coverage (75%) all express stronger levels of support for legislation to expand asynchronous telehealth. Notably, healthcare workers are among the strongest supporters (82% total support, including 51% strongly support).

6. A majority of Americans continue to believe telehealth companies have stepped up during the coronavirus pandemic.

- A majority (51%) of Americans (including 66% of telehealth users) say telehealth companies' coronavirus response has been good or excellent (20% of respondents do not know enough to give a rating).

BOTTOM LINE

Propelled by the coronavirus pandemic, the awareness and use of telehealth has grown dramatically over the past two years. As our lives have increasingly moved online, so too has the delivery of healthcare. Americans want to receive health care in the way that works best for them and for millions of Americans that includes telehealth, including both synchronous real-time video consultation as well as asynchronous consultation between provider and patient. Based on this representative survey, Americans want to be in control of their care and would like to see legislators expand options and mediums of care delivery.

¹ Data from June 2019 are from a J.D. Power National Survey. The description of telehealth and question language differ. Data from April and August of 2020 are from Jarrard Phillips Cate & Hancock and Public Opinion Strategies national online surveys. The description of telehealth and question language differ.