CivicScience Insight Report

Researching the Early Adopters of Virtual Doctor Healthcare

November 4, 2014 Report: Telemedicine and the use of "virtual" doctor's visits is the focus of this report, which highlights top-line consumer adoption intent data, as well as deeper analysis of three patient-consumer segments:

- **Early Adopters**
- **Persuadables**
- **Detractors**

The report also showcases how one commercial provider, DermatologistOnCall®, is leveraging market research data.

The Association of American Medical Colleges says that the U.S. faces a shortage of more than 130,600 physicians across primary care and all specialties by 2025. It's an alarming statistic, particularly as the Affordable Care Act (aka "Obamacare") is expected to bring waves of new, previously un-serviced patients into the healthcare system – and combined with an aging U.S. population. While physician training facilities seek out new sources of funding to prep more residents and graduate students, one solution prong has seen significant product development: **telemedicine**.

Telemedicine is a way for healthcare providers to interact with and even treat patients *from a distance*, creating efficiencies in both time savings for all parties involved as well as reduced costs due to scale. Telemedicine also often allows for extended hours of service, which given patients' busy schedules and their use of portable connected devices (such as laptops, smart-phones, and tablet computers) makes it even more convenient to service a larger number of patients with greater ease. Many insurance providers, large healthcare practices, and hospital networks now offer some degree of this capability. In addition, many new commercial businesses are getting into the fray to take advantage of this opportunity, such as Doctor On Demand™ (with ties to TV personality Dr. Phil McGraw), MeMD®, Iagnosis® with its specialty service of DermatologistOnCall®, and dozens more.

But as with all new products and services, there is an adoption curve – and for telemedicine, certain types of consumers are emerging as more likely to jump on board sooner. In this CivicScience Insight Report, we mine the data of 10,850 U.S. adult consumers who responded from August 18, 2014 to October 1, 2014 to a poll question:

> **"What do you think about paying out-of-pocket for "virtual" online doctor appointments that allow you to be seen and diagnosed faster for certain health conditions?"**

We grouped the respondents into three segments:

- **Early Adopters** – This accounts for the 3% of respondents who have said either "I have done this – and would do it again" or "I have done this – and would not do it again."
- **Persuadables** – Those 44% who have said "I haven't done this – but want to try it" and "I don't have an opinion."
- **Detractors** – The 54% who said "I haven't done this – and don't plan to try it."

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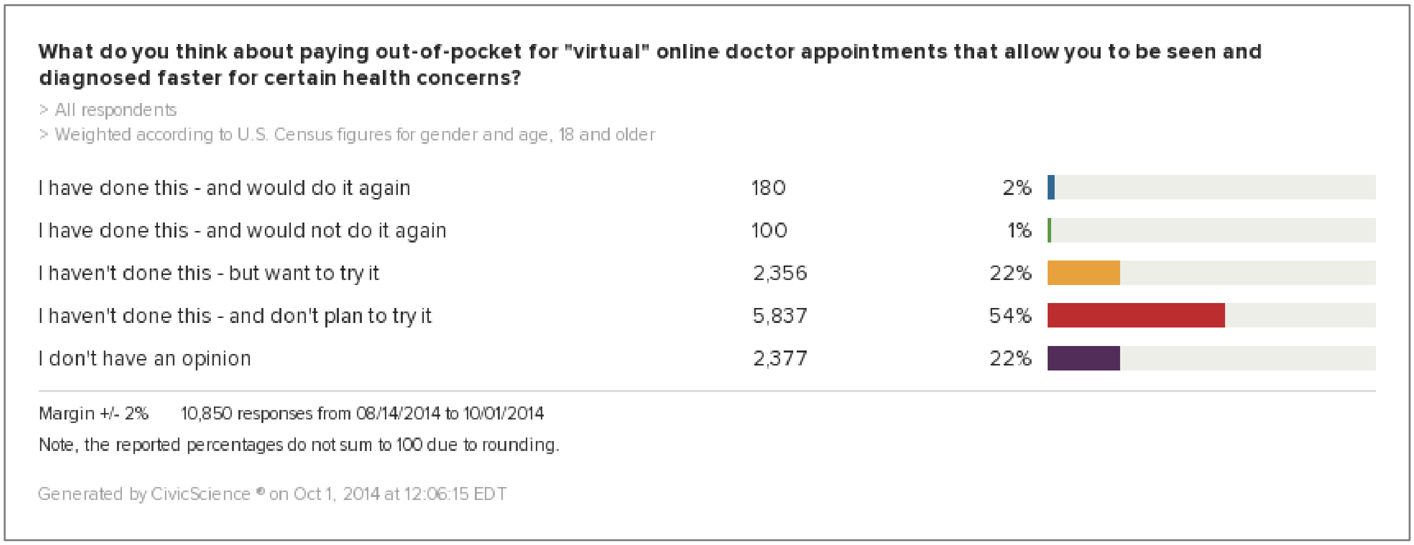
We'll cross-tabulate these response segments with dozens of the thousands of active CivicScience syndicated poll questions that have been asked over time, to provide persona insights into their demographic and psychographic makeup. We only highlight a few in this report, but many more insights are available. And not every data category resulted in statistically meaningful differences (i.e. income may be a factor for some of the 3 segments but not all).



Early Adopters

Early adopters are those who are ahead of the curve in trying a particular new product or service offering. Because they are often "market mavens" by nature, it's usually key to win them over during those early touch points, particularly in today's world of online social information sharing.

Age: Age-wise, we see slightly higher likelihood to try a virtual doctor visit among those 18-44, although the older populations are not significantly lower than one might have expected. However, early adopters who indicated they are dissatisfied ("I have done this – and would not do it again") are a bit higher among those aged 18-24 and 30-44.

Gender: Men are more likely than women to have tried this and are less likely than women who've tried it to say they were dissatisfied. Gender can vary by service though – in a separate, custom study CivicScience did for Iagnosis (DermatologistOnCall®), we found that women were more likely than men to be interested in such virtual appointments for skin health concerns.

Income: Those making over $150,000 in annual household income are more likely to have tried this form of telemedicine and also say they'd try it again.

Parental Status: Parents are 21% more likely than non-parents and 48% more likely than grandparents to have tried it and say they'd do it again.

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Busy Schedules: Respondents who said they are "extremely busy with almost no spare time" are 78% more likely to have tried a virtual doctor visit than those who said they are "not very busy" or "I've got lots of time on my hands."

Doctor Visits: These early adopters are also more likely to have had zero doctor's office visits vs. any number of visits in the 12 months prior to answering the telemedicine question.

TV Viewing: Those who say they never watch TV are significantly more likely to be an early adopter (4X as likely as those who watch six or more hours of TV per day).

Influencers: This group is also much more likely than the persuadables and detractors to say their consumption decisions (what they buy, where they eat, and movies and TV they watch) are most influenced by ads on the Internet as opposed to ads on TV or comments and recommendations they see on social media. However, social media chatter is overall the most popular influence choice among the early adopter group.

Persuadables

This is often the most important group for a newer-to-market offering to study: Persuadables are those who have not yet tried a product or service, but who have presented signals that they might be convinced to consume. Because persuadables represent where the next wave of customers will more likely come from, it's key that marketers understand this category well – and potentially segment them further using key attributes.

Age: Those aged 35-54 are more likely to say "I haven't done this – but want to try it." There appears to be no major gender difference among these respondents and general population numbers.

Parental Status: Both parents and non-parents are equal in saying "I haven't done this – but want to try it" and are 82% more likely than grandparents to say this. Non-parents are 35% more likely than parents and 55% more likely than grandparents to say they have "no opinion."

Smart-Phone Usage: These persuadable respondents are 50% more likely to use a smart-phone than not, which provides more mobile access to telemedicine. DermatologistOnCall® is a prime example of how the camera-phone and smart-phone combination work together to provide better patient service: take a photo of a skin issue and send it to the doctor right away.

Doctor Visits: They are more likely to have had fewer than two doctor's visits vs. more in the 12 months prior to answering the virtual doctor appointment question.

Smoking Status: Every-day smokers are 16% more likely to want to try this type of telemedicine than we would have expected from the data.

Influencers: While TV advertising edges out social media chatter in being the most influential in consumption decisions, the persuadable group is still more likely than detractors to say they are most influenced by Internet ads.

Detractors

Detractors in this report are those consumers showing negative reaction to a particular product or service and are highly unlikely to ever be persuaded to try it.

Age & Parental Status: Age-wise, the distribution here is pretty consistent with the general population, except those over age 65 are more likely to say they don't plan to try it. It makes sense, then, that those indicating they are grandparents are slightly more likely to be detractors.

Gender: Women are slightly more likely to be detractors than men.

Doctor Visits: These respondents are slightly more likely to have had six or more doctor's visits vs. fewer in the 12 months prior to answering the telemedicine question.

Influence: More detractors say they are influenced by ads on TV than by Internet ads or social media comments and recommendations.

Real-World Research in Action: Iagnosis and DermatologistOnCall®

Iagnosis is a leading technology provider of online dermatology services via convenient 24/7 access to affordable, high-quality medical care staffed by a network of board-certified dermatologists. Its flagship product, DermatologistOnCall®.com, offers patients a diagnosis, electronic prescription and treatment plan that includes counseling on the condition.

The timing of Iagnosis's market opportunity is perfectly aligned with technology and consumer preparedness: patients know how to capture and upload digital images, i.e. with smart phones, based on experiences using social media platforms. It also provides great service reach to patients in some markets where over 50% of skin care cases are being seen by non-dermatologists (i.e. family care, urgent care, or other settings).

Iagnosis plans to use custom consumer research data obtained through CivicScience to gain better insights into those identified as "Persuadables" for their particular telemedicine area, and how to use those insights to create a strategy to target and convert those who are "willing to try" based on behavioral and attitudinal factors. Iagnosis's Persuadables differed in several areas from general telemedicine Persuadables, such as in some key demographics and online behaviors. Their brand awareness campaigns will leverage this audience's existing desire to potentially use telemedicine options. Promoting the service's ease of use, convenience, and quality will be points of emphasis to remain top of mind when a consumer realizes he/she has a skin care need.

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Those Iagnosis Persuadables without an opinion will require a different level of targeted education and additional nurturing to convince them that this is a viable and quality option for care. Testimonials, word of mouth, quality studies, and endorsements are likely to help influence this audience to look at telemedicine favorably to decide to try. And consumer research data from CivicScience provides the backdrop for many of these decisions.

In Summary

As you can start to see, there are clear distinctions to be found through research data mining among these different patient-consumer segments for telemedicine, specifically for virtual doctor office visits. Using market research insights can provide valuable intelligence to healthcare providers and commercial offering providers to better attract and service these potential consumers.

Here's the good news for telemedicine providers though: Of those respondents in this study who have tried this type of service, two-thirds say that they would do it again – which appears to be a strong satisfaction indicator.

About the CivicScience Methodology:

CivicScience collects real-time consumer research data via polling applications that run on hundreds of U.S. publisher websites, cycling through thousands of active questions on any given day. Respondents are 100% opt-in with no incentives or compensation; they answer just for fun and are kept anonymous, allowing for greatly reduced bias and higher levels of engagement. Respondents for this report were weighted for U.S. census representativeness for gender and age, 18 years and older. 10,850 U.S. adults responded to the question "What do you think about paying out-of-pocket for "virtual" online doctor appointments that allow you to be seen and diagnosed faster for certain health concerns?" from August 18, 2014 to October 1, 2014. Using its technology, CivicScience builds deep psychographic profiles of these anonymous respondents over time, providing valuable consumer sentiment data to the decision makers who care. The CivicScience methodology has been validated by a team of academic leaders and by independent consulting firms. CivicScience currently has more than 28 million anonymous consumer profiles stored, growing daily.