

Intel Digital Health Telehealth in the U.S. Health Care System Preliminary Topline Survey Findings

May 2010

Methodology and objectives

- Between April 29 and May 10, 2010, Penn Schoen Berland conducted 75 phone interviews with healthcare and IT professionals in the US who play a role in determining telehealth adoption and implementation within their organizations. This includes:

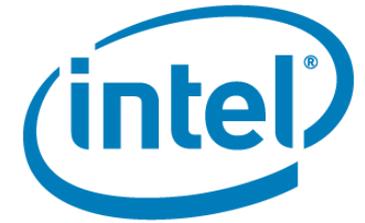
Organizations

- Hospitals
- Private Clinic
- Independent home health
- Disease management organizations
- Private payers

Job Titles

- President
- Chief Executive Officer
- Chief Medical Officer
- Chief Nursing Officer
- Chief Information Officer

- The margin of error is +/- 11.3% and larger for subgroups.



Telehealth expectations

Expectations overview

- Respondents have very high expectations for telehealth, with more than 8 in 10 believing that it will improve quality of care and dramatically change healthcare in the US for the better
- One major area that telehealth, and tech innovation generally, is expected to help solve for is healthcare for the aging population
 - Over half of respondents believe that our current healthcare system cannot sufficiently address the challenges of an aging population
 - Of those, the majority expect the adoption of telehealth and related practices to help in the areas where our current system is lacking

More than 8 in 10 providers believe that telehealth will improve quality of care



Which of the following is closest to your view?

Ranked by All	All
Telehealth will improve healthcare quality because physicians will have better access to patient data through ongoing monitoring.	87
Telehealth will not improve healthcare quality because physicians can't treat patients as effectively remotely.	12
Don't know	1



Almost 9 in 10 expect telehealth to play a major role in healthcare over next 10 years

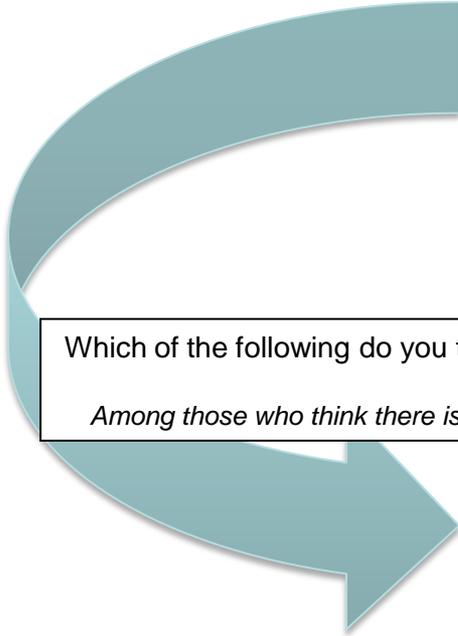
Which of the following is closest to your view?

Ranked by All	All
Telehealth is going to dramatically change the way we manage patients' health care in the US over the next 10 years.	89
Telehealth is not going to have a very big impact on the way we manage patients' health care in the US over the next 10 years.	11
Don't know	0

Medical Tech innovation and application of new technology viewed as crucial to support the aging population

Which of the following is closest to your view?

Ranked by All	All
There is no way to adequately support the aging population using our current healthcare infrastructure in the US.	51
We will find a way to adequately support the aging population using our current healthcare infrastructure in the US.	49
Don't know	0



Which of the following do you think will play the biggest role in helping the US find a way to support the healthcare needs of its aging population?
Among those who think there is no way to adequately support the aging population using our current healthcare infrastructure in the US (51%)

Ranked by All	All
New models of healthcare delivery	47
Healthcare legislation	29
New technology	18
Medical research- advancements	3
Other	3
Don't know	0

Nearly 2 in 3 BELIEVE TELEHEALTH will play a major role in solving the aging population challenge, and majority think it can be integrated into healthcare management of aging Americans today



Which of the following is closest to your view?

Ranked by All	All
The US healthcare industry will rely heavily on telehealth practices to address the aging population over the next 10 years.	60
The US healthcare industry will rely heavily on other healthcare solutions besides telehealth to address the aging population over the next 10 years.	37
Don't know	3

Ranked by All	All
Telehealth has the potential to be widely used among Baby Boomers.	75
Telehealth is not likely to be widely used until Generation X begins aging.	25
Don't know	0



Perceived Advantages and Barriers

Perceived advantages and barriers overview

- A plurality of respondents focus on quality of care and patient outcomes as the primary advantage of telehealth
 - This is in line with the nearly 90% of respondents who believe that telehealth can translate into higher quality of care
- Perceived challenges to telehealth adoption are primarily focused around financial issues such as reimbursement
- However, strong belief in the return on investment of telehealth (nearly 7 in 10 agree) suggests that if the reimbursement and cost issues were resolved, healthcare providers would be likely to implement telehealth practices
 - Over half also look to the new healthcare legislation to expand telehealth coverage

Improved quality of care is the biggest perceived advantage to telehealth adoption

In your opinion, which of the following is the **biggest advantage** to the adoption of telehealth practices, if any?

Ranked by All		All
Quality	Quality (e.g. early identification of health issues and interventions) (16%)	42
	Improved patient outcomes (27%)	
Access	Access (e.g. more complete access to patient data, more timely and actionable information) (20%)	27
	Volume (e.g. better productivity for clinicians and scalability to large patient populations) (7%)	
Cost	Cost savings (e.g. for the patient or for the healthcare organization)	21
Patient engagement- compliance		5
Other		4



Financial challenges are the primary perceived barriers

- Financial barriers are more focused on reimbursement issues, rather than initial costs or return on investment.

In your opinion, which of the following is the **biggest barrier** to the adoption of telehealth practices, if any?

Ranked by All	All
Reimbursement issues (Private payer, Medicare, Medicaid, etc.)	29
Fear of technology (e.g. lack of buy-in from clinical staff or concern about how patients will be able to use the technology)	20
Cost (e.g. capital investment, return on investments, etc.)	13
Deployment challenges (e.g. training, physician and staff adoption, compliance, etc.).	12
Concerns about quality of care	9
Liability associated with managing so much patient health data	5
Concern that telehealth doesn't integrate into the current health IT-EMR system	3
Other	4
I don't think there are any barriers	4
Don't know	0

Nearly 7 in 10 expect telehealth to be worth the costs despite perceived financial challenges initially

Which of the following is closest to your view?

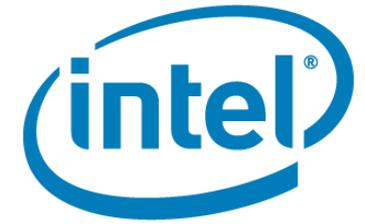
Ranked by All	All
In general, telehealth investments pay off in the long run and are worth the initial investment.	69
Telehealth investments do not offer enough of a return on investment to justify the initial investment.	28
Don't know	3



Regardless of current challenges, More than half expect Healthcare legislation will help expand telehealth practices

Which of the following is closest to your view?

Ranked by All	All
The new healthcare reform legislation will accelerate the adoption of telehealth practices	57
The new healthcare reform legislation will not accelerate the adoption of telehealth practices	35
Don't know	8



Appendix

Split view of the future of healthcare, though agree that legislation has biggest potential impact

Of the following topics, which do you think will have the biggest impact on healthcare in the next 5 years?

Ranked by All	All
Healthcare legislation	48
Healthcare costs	29
New technology	13
Demographic shifts	7
Medical research- advancements	3
Other	0
Don't know	0