

# **HIMSS** *Analytics*<sup>®</sup> 2015 Telemedicine Study

Telemedicine solutions/  
services are poised  
to become a significant  
facet of patient care

With the shift of volume-based care to value-based care and the development of population health and accountable care programs, the familiarity and adoption of telemedicine solutions/services is on the rise. In this Essentials Brief, we share insight from nearly 300 healthcare executives, IT professionals, clinicians, department heads, practice administrators and managers, and physicians on current adoption, plans to invest, market drivers and future outlook around telemedicine solutions/services.



**Telemedicine adoption** is up to **65% for hospital respondents** and **34% for physician practices**.

## 3 percent increase in the number of organizations using telemedicine solutions/services since 2014

Indeed, what was once thought of as futuristic is now a reality. Businesses across industries are utilizing technology to expand their reach, and healthcare organizations are no exception. While small, the increase indicates that organizations are turning to telemedicine to help expand their care reach, provide additional services and potentially lower the cost of care.

# The telemedicine market contains some complexities that pose potential challenges to vendors and providers



The term “telemedicine” is still very broadly used to describe a number of solutions, services, and even vendors which makes it difficult for provider organizations to get a sense of the most appropriate tools for their needs. Additionally, while adoption of telemedicine solutions/services has risen slightly between 2014 and 2015, provider organizations are still determining how best to use them.

Historically, no one solution/service has emerged as dominant in the telemedicine space, but a shift has begun to occur as organizations realize the importance of expanding their services, improving care and lowering costs.

# Deployment Models and Technology

## Market corroboration between most widely-used technology and most popular deployment model



**Two-way video/webcam** usage increased to **70%**, making it the **most utilized** telemedicine product/solution.

The telemedicine market is complex in that it covers multiple technologies, from consumer health applications to video consultations, serviced by a growing vendor pool. Amidst the expanding field, healthcare organizations are beginning to understand how best to use these technologies via a number of different deployment models.

The most popular deployment method utilizes the 'hub and spoke' model. Fifty-seven percent of survey respondents cited usage of this model, which allows for audio and visual capabilities between originating sites. Given this model's popularity, it should be no surprise that organizations' usage of two-way video and webcams also increased to nearly 70 percent from 58 percent a year ago.

# HIMSS Analytics and WEGO Health Consumer Telemedicine Perspective

During the same time the 2015 Telemedicine study was in the field, HIMSS Analytics worked on a pilot program with WEGO Health to collect insight directly from the patient/consumer healthcare space.

A panel was created and the questions on telemedicine were posed to the participants. Their voice responses were recorded and submitted back to WEGO Health via their portal. The responses provide a consumer perspective and, when coupled with insights from the Telemedicine Essential Brief, give vendors and providers a unique look into the most important audience: patients.

**For full panel transcripts, please see the 2015 Telemedicine Study.**

**QUESTION:** We would like you to please think of two groups of people in the communities you lead: People who use telemedicine services with their physician; and, people who have the option to use telemedicine services with their physician but have chosen **NOT** to use them. Now, explain the main reasons you have heard that people **DO** choose to use telemedicine services – and then explain the main reasons people choose **NOT** to use telemedicine services.

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# Other Questions in the Study

- What is the primary reason your organization does not plan to invest in telemedicine solutions/services?
- Describe your telemedicine/telehealth services five years from now.
- What was the primary driver for your organization's investment in telemedicine solutions/services?
- What best describes the future goals of your organization regarding the use of telemedicine solutions/services?
- Do you have any plans to invest in telemedicine solutions/services in the next 24 months?

De-identified, raw data is available with segmentation capabilities around organization designation.

**HIMSS Analytics is focused on supplying healthcare IT vendors and providers with relevant data that leads to better decision making. We conduct these studies to provide real-time snapshots of market activity across multiple solutions and initiatives. However, the market's trust is important to us and we will never provide the names of study participants.**

# About HIMSS Analytics

The HIMSS Analytics Advisory Solutions group provides quantitative and qualitative research solutions to guide you through your product value stream.

- What challenges are you facing?
- How can we help?

Contact us at [advisorysolutions@himssanalytics.org](mailto:advisorysolutions@himssanalytics.org)

HIMSS Analytics collects, analyzes and distributes essential health IT data related to solutions, costs, metrics, trends and purchase decisions. It delivers quality data and analytical expertise to healthcare delivery organizations, IT companies, governmental entities, financial, pharmaceutical and consulting companies. Visit [www.himssanalytics.org](http://www.himssanalytics.org).

HIMSS Analytics is a part of HIMSS, a cause-based global enterprise that produces health IT thought leadership, education, events, market research and media services around the world. Founded in 1961, HIMSS encompasses more than 52,000 individuals, of which more than two-thirds work in healthcare provider, governmental and not-for-profit organizations across the globe, plus over 600 corporations and 250 not-for-profit partner organizations, that share the cause of transforming health and healthcare through the best use of IT. HIMSS, headquartered in Chicago, serves the global health IT community with additional offices in the United States, Europe, and Asia.





# About WEGO Health

WEGO Health connects organizations to tens of millions of health consumers through our trusted network of patient influencers and innovative collaboration platforms. We have been a partner to patient leaders and their communities since 2007. We have developed a range of solutions to meet business needs and support our patient influencer members — including research, recruitment, collaboration and activation.

The WEGO Health Network includes over 100,000 patient influencer members from virtually every health condition. They are bloggers, tweeters, pinners, and leaders of Facebook pages — these are the empowered patients that drive the healthcare conversation online, across virtually every health topic and condition.

Patient Influencers are defined by:

- Having experience with a condition as a patient, caregiver or physician
- Staying current on condition news and treatment options
- Are active contributors to online health communities
- Participating in online communities at least weekly – and usually daily

**More information is available at**  
[www.wegohealthsolutions.com](http://www.wegohealthsolutions.com)

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