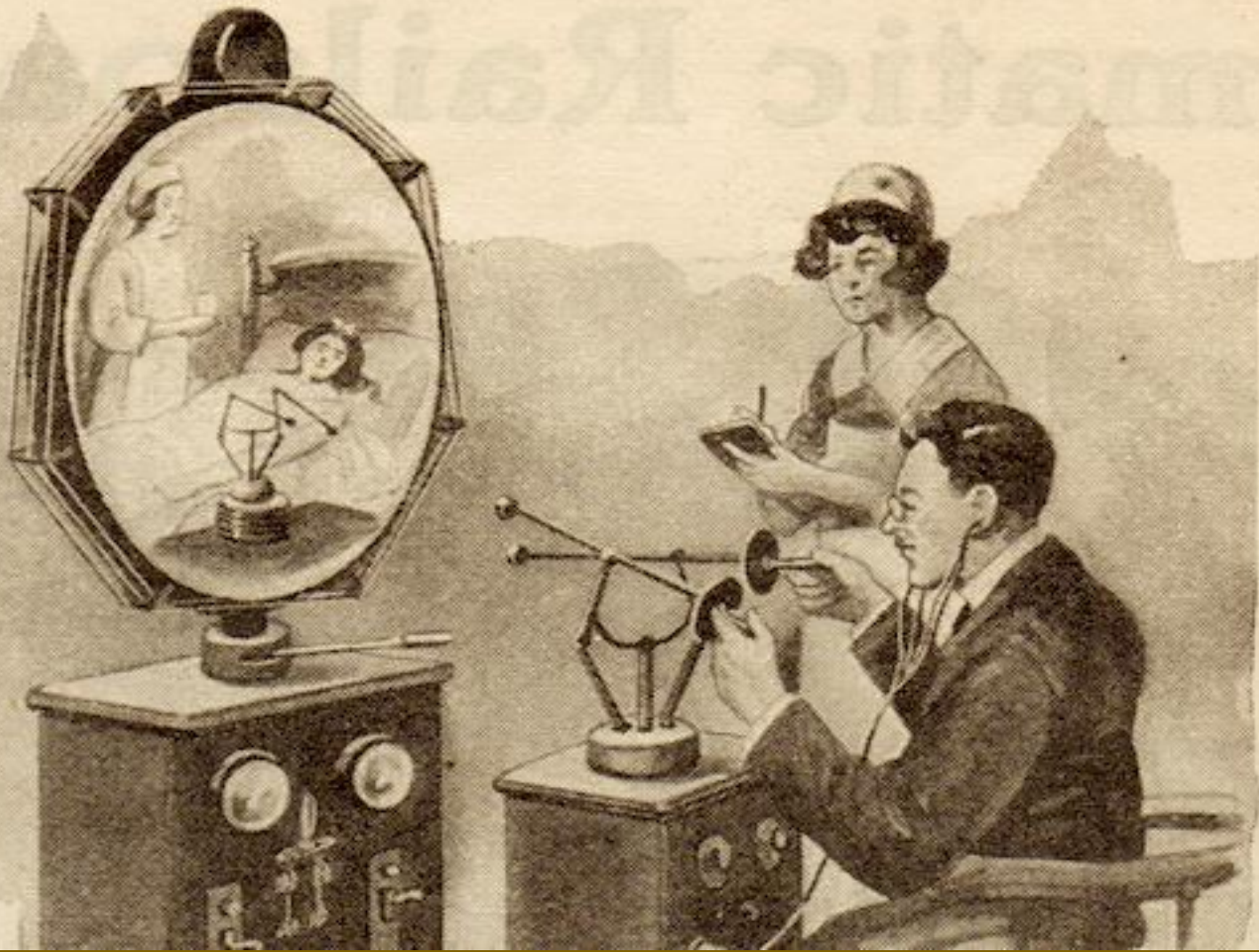


Connecting The Telehealth Marketing Dots



**To Engage 54 Million
Family Caregivers**

Robert Roth, PhD

Introduction

Telehealth usage has potential to grow exponentially, both in the United States, and worldwide. That potential is driven by:

- ❑ Continuing growth of the number of family caregivers (during 2023, an estimated 54 million in the U.S. and 534 million worldwide),
- ❑ The often extreme negative physical and mental health impacts of family caregiving,
- ❑ Increasing aging of the worldwide population - The percentage of worldwide population age 65 and over is forecast to almost double, increasing from 9.3% in 2020 to 16.0% in 2050,
- ❑ Increasing prevalence of chronic diseases,
- ❑ Continuing healthcare cost increases,
- ❑ Increasing demand for convenient and accessible healthcare options,
- ❑ Quantum improvement of telehealth technologies during the COVID-19 pandemic and continuing innovation,
- ❑ Continuing innovation of technologies that make it easier and more convenient for clinicians to provide telehealth care, and for patients to receive it.

The Good News for more than 54 million U.S. family caregivers is that telehealth providers are increasingly capable of delivering a wide range of medical services when, where and in the manner that caregivers need them.

But **the Bad News for telehealth providers, and their investors**, is that *very few* family caregivers have taken advantage of a telehealth service. And among the few caregivers who have given telehealth a try, almost half have not returned for a second visit.

Clearly, there is a wide disconnect between the healthcare advantages that telehealth can potentially deliver to family caregivers and caregiver awareness and trial of those services. Put another way, it is apparent that the telehealth industry's consumer marketing dots are disconnected.

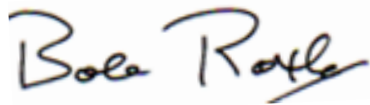
Arguably, this disconnect will be the industry's greatest challenge in achieving the staggering revenue increases that a variety of financial pundits are forecasting.

Connecting The Dots To Engage 54 Million Family Caregivers

Telehealth leaders need to do some serious dot connecting. And, that dot connecting needs to start with, and be continuously propelled by a vast array of engaging and compelling digital content that:

- ❑ Makes medically underserved family caregivers aware of the telehealth services that are available whenever, wherever, and however they need them, and
- ❑ Enables clinicians to provide family caregivers with often desperately needed medical and emotional support services, whenever, wherever, and however caregivers need them.

I am personally and professionally dedicated to helping telehealth providers get their marketing dots connected. If your organization is interested in becoming a dot connecting leader, I would appreciate the opportunity to help you to make it happen.



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The Challenge For Family Caregivers

Because of their isolation, financial stress and transportation challenges, the majority of Family caregivers, worldwide, find it difficult to access affordable quality health care when, where and as they need it. Caregivers' challenges include:

- **Isolation**

The U.S. Census Bureau estimates that 60 million people living in rural communities receive lower-quality healthcare and have worse outcomes compared to urban and suburban dwellers. In addition to geographic isolation, many caregivers are isolated by 24/7 caregiving chores, limited financial resources and personal health challenges.

- **The Cost of Care**

According to the CDC, 13 million Americans failed to obtain needed medical care due to cost during 2017.

- **Long Wait Times**

A [report](#) published by Merritt Hawkins notes that the average wait time for a new patient appointment with a provider, in the 15 largest U.S. metropolitan areas, was 26 days during the January to September 2022 period.

- **Transportation**

According to the American Hospital Association, 3.6 million Americans are unable to receive medical care due to transportation challenges.

- **Stress**

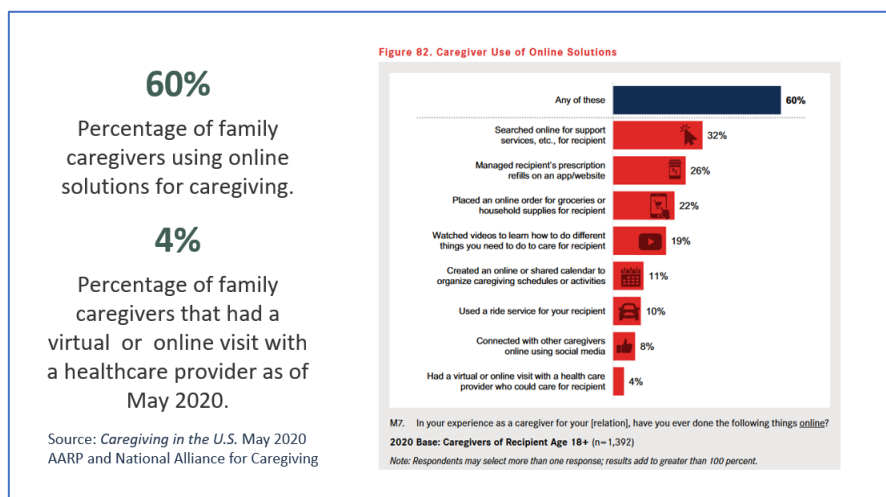
The stress that results from often 24/7 caregiving burdens family caregivers with a pressing variety of medical and emotional challenges.

There is little doubt that telehealth services can help millions of family caregivers overcome some of their most difficult challenges. But the challenge for telehealth providers is the fact that *very few* family caregivers are taking advantage.

The Challenge For Telehealth Providers

Despite the fact that telehealth providers are ready, willing, and able to deliver much needed medical and emotional support services to family caregivers, *very few* family caregivers are taking advantage.

An AARP and National Alliance for Caregiving study indicates that, as of 2020 (the peak of hospitalizations due to COVID), **60% of family caregivers were using online solutions for caregiving; but only 4% had participated in an online visit with a healthcare provider.**



During 2021, Fair Health, a non-profit organization, reported that telehealth use in the United States dropped **76%** from 2020 to 2021.

And a 2022 report from Trilliant Health, the leading market research firm in the healthcare industry, indicates that during the first quarter of 2022 **nearly half (48.7%)** of first-time users used telehealth only once.

Source:

<https://www.businesswire.com/news/home/20221019005398/en/Trilliant-Health%E2%80%99s-Second-Annual-Trends-Shaping-the-Health-Economy-Report-Details-Major-Economic-and-Market-Forces-Defining-U.S.-Healthcare>

This low level of consumer adoption is remarkable considering the past 100 years of telehealth technology innovation and the wide range of services that became available during the COVID-19 pandemic.

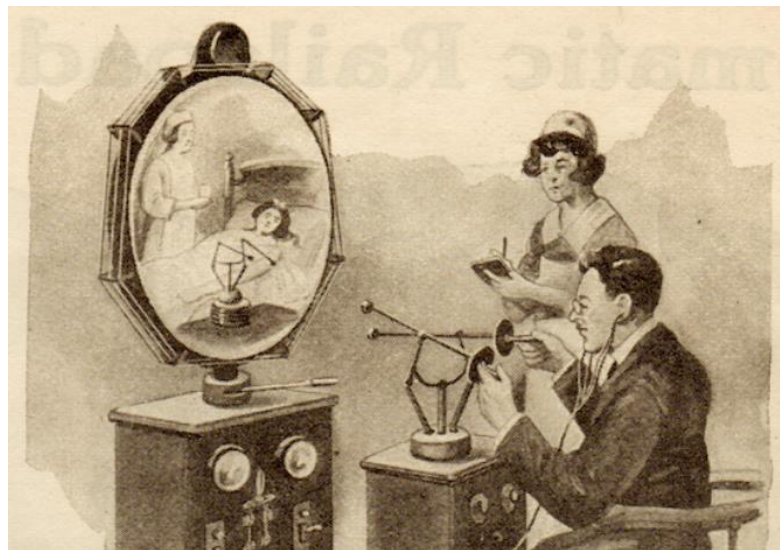
100 Years of Telehealth Technology Innovation

The fact that telehealth services have not been enthusiastically embraced by family caregivers is puzzling considering that innovative technologies have been evolving for almost a century.

During 1925, an early attempt at communication aided telemedicine was proposed by Hugo Gernsback.

Mr. Gernsback called his proposed telemedicine system the “teledactyl.”

In theory, the teledactyl system would allow doctors to not only see their patients through a television screen . . . but also “touch them” from a distance by manipulating his controls which then control a similar mechanism at the patient’s bedside.



The advanced technology envisioned by Mr. Gernsback eventually became a reality and set the stage for a new era of telemedicine and telehealth innovation.

Source: <https://www.smithsonianmag.com/history/telemedicine-predicted-in-1925-124140942/>

During 1959, the University of Nebraska utilized video telemedicine to transmit neurological examinations for consultations. Other programs used in academic setting transmitted fluoroscopy images, x-rays, stethoscope sound and electrocardiograms to support health care providers in rural areas.

Source: <https://medcraveonline.com/IJBSBE/the-evolution-and-transformation-of-telemedicine.html>

In the 1970s, Kaiser Foundation International partnered with Lockheed Missiles and Space Company to create a remote monitoring system capable of providing healthcare delivery.

Connecting The Dots To Engage 54 Million Family Caregivers

The system enabled physician assistants to send patient information from a remote facility to a hospital or medical facility many miles away. The goal of this program was to enable rural areas around the globe to receive better healthcare services and improve patient outcomes.

Source: <https://mhealthintelligence.com/news/the-history-of-remote-monitoring-telemedicine-technology>

The 1990s were the “developmental years” of telemedicine. During this decade, telecommunications evolved to the point that it was more available and affordable, and passage of state and federal legislation propelled the field forward by recognizing telemedicine as a reimbursable mode of care provision.

Source: <https://accessmedicine.mhmedical.com/content.aspx?bookid=2217§ionid=187794434#1158358711>

During 2014 Cleveland Clinic eHospital program. This program provides patients at 4 hospitals with input from staff intensivists and experienced critical care nurses during the night (7 pm to 7 am) via remote monitoring.

During 2016, Cleveland Clinic launched its Remote Hypertension Improvement Program, an enterprise-wide initiative to minimize hypertension-associated mortality and morbidity with the assistance of telehealth services.

Source: <https://www.ccm.org/content/ccjom/85/12/938.full.pdf>

During 2020, and throughout the COVID-19 pandemic, a number of telehealth companies attracted substantial investment and innovated to offer 24/7 access to doctors wherever and whenever a patient may need it. Leading competitors included Teladoc, Livongo, Navigating Cancer, 98point6, 23andMe and Amazon.

Telehealth Assisted Drug Trials

In addition to providing virtual medical services to patients, telehealth technology has been innovating drug research processes since shortly after the dawn of the 21st Century.

During 2008 and continuing through 2017 technology-assisted glucose-lowering diabetes drug trials involving more than 140,000 participants were ongoing or completed.

Source: <https://www.sciencedirect.com/science/article/pii/S014929181730200X>

Connecting The Dots To Engage 54 Million Family Caregivers

During 2011, the Tufts Center for the Study of Drug Development reported that bringing a new therapeutic entity through research and development (R&D) required at least 10 years, and the average capitalized cost exceeded \$2.6 billion.

The period necessary for clinical testing was particularly time and cost intensive. At that time, an estimated 11% of sites in any multicenter global clinical trial were failing to enroll a patient, almost 40% were failing to meet initial recruitment targets, and 49% of all enrolled participants dropped out before study completion.

Responding to these challenges, pharmaceutical manufacturers began incorporating emerging telehealth technologies into trials during 2011.

Source:

https://f.hubspotusercontent10.net/hubfs/9468915/TuftsCSDD_June2021/pdf/PFILES+OF+NEW+APPROACHES+TO+IMPROVING+THE+EFFICIENCY+AND+PERFORMANCE+OF+PHARMACEUTICAL+DRUG+DEVELOPMENT+.pdf

During 2015, the “virtual” trial concept was reinforced when the U.S. FDA solicited feedback on the use of [telehealth](#) technologies to improve efficiency of clinical trial conduct.

Major drug companies in Europe and the United States launched feasibility trials using Web-based methods. The European trial, sponsored by Sanofi, assessed the utility of a 3G-enabled wireless blood glucose meter for glucose profiling from remote sites.

In the United States, Genentech incorporated a videoconferencing and messaging platform into a trial of treatment for a rare autoimmune skin condition occurring in less than 1/100 of 1% of the global population. Candidates from seven US states were recruited through the “virtual” site, and enrollment was more than 20 times faster than that projected for non-remote sites.

During 2017, additional technology-aided trials conducted prior to and during 2017 included:

- The Fox Trial Finder, an online Parkinson disease trial-matching tool that enabled researchers to solicit volunteers from throughout the United States to use videoconferencing from their homes. The Trial Finder provided a database of more than 42,500 individuals for Parkinson research.
- The Oregon Center for Aging and Technology (ORCATECH) provided a far-reaching prototype for In-home Monitoring for Mild Cognitive Impairment associated with Alzheimer Disease.

Connecting The Dots To Engage 54 Million Family Caregivers

During 2021 the National Library of Medicine published study results on Using Digital Tools to Advance Alzheimer’s Drug Trials During a Pandemic. Study findings suggested that, despite the fact that the 2020 COVID-19 pandemic disrupted Alzheimer’s disease clinical studies worldwide, digital technologies may help minimize disruptions by enabling remote assessment of cognitive and functional changes.

Source: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8244451/>

As of 2023 family caregivers have access to a variety of telehealth services including:

- Teladoc Health**, the largest telehealth provider in the United States.
- Amwell**, a leading telehealth provider that offers similar services to Teladoc.
- MDLive**, a popular provider of video visits with doctors, psychiatrists, and others.
- PlushCare**, a telehealth provider that specializes in sexual health care.
- Doctor on Demand**, a telehealth provider that offers video visits with doctors.
- Cigna CareEasy**, a telehealth service offered by Cigna, a health insurance.
- CVS Health Virtual Visits**, a telehealth service offered by CVS Pharmacy.
- Walmart Health Virtual Care**, a telehealth service offered by Walmart.
- HealthTap**, a telehealth provider that offers a variety of services.
- Doxy.me**, a platform that allows providers to see patients anywhere in the world.
- Soothe**, a telehealth company that specializes in providing mental health care.
- 7 Cups**, a telehealth company that offers free and confidential peer support.
- Blink Health**, a telehealth company that allows patients to order prescriptions.
- Hims & Hers**, a company that offers health products and services.
- Maven**, a telehealth company that provides fertility and women's health services.
- Sesame Care**, a telehealth company that offers pediatric care.
- GoodRx Care**, a telehealth company that offers affordable medications.
- LiveHealth Online**, a telehealth service offered by UnitedHealthcare.
- Tricare Virtual Health**, a telehealth service for military members and families.

There is clearly no shortage of telehealth industry leaders.

The Dot Connecting Challenge

While there is *no shortage* of telehealth technologies and providers, there is a *severe shortage* of telehealth customers. Clearly, connecting the consumer marketing dots is a critical industry challenge.

Additional factors contributing to this challenge include:

- The pandemic has subsided - people are returning to in-person care.
- Some of the federal funding that supported telehealth during the pandemic has expired.
- Some insurers have begun to reduce their pandemic era reimbursement levels for telehealth visits.

As the starting point for addressing the dot connecting challenge, it is important to clearly understand that:

**For most health care consumers, telehealth is a *new product*.
And new consumer products seldom garner much market
success without considerable support from well strategized and
extensive consumer marketing.**

During the pandemic, funding was poured into developing new telehealth technologies. Marketing those technologies was not a priority. As a result, very few family caregivers are aware of the remarkable telehealth technologies that are available. Very few caregivers have given them a try. And, among the very few caregivers who have given telehealth a try, most have used it only once.

Bottom line, telehealth providers have a marketing problem. The problem, viewed in marketing terms, is lack of awareness . . . which results in very limited first-time trial . . . which results in very, very few retained family caregiver customers. The telehealth marketing dots are disconnected.

Getting The Dots Connected

The healthcare landscape, both in the U.S. and worldwide, is undergoing a transformative shift that has potential to drive staggering increases in revenue for the telehealth leaders that get their consumer marketing dots connected.

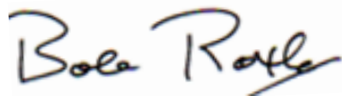
The global market is forecasted to grow from \$143 billion USD in 2023, to \$504 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 19.7%. Telehealth industry revenue, in the U.S. alone, is projected to reach \$30 billion during 2023 and \$150 billion by 2030.

Factors driving this growth will likely include:

- Digital marketing that drives increasing interest and participation in telehealth care among *both* family caregivers and also healthcare providers,**
- Surging demand for remote patient services and monitoring,
- Increasing scarcity of physicians and clinicians, particularly in rural areas,
- Increasing healthcare operational efficiency that reduces wait times, optimizes appointment scheduling, and streamlines administrative and billing operations,
- An aging population that finds telehealth services more affordable and convenient.
- The rising cost of building and maintaining physical healthcare facilities.

If your organization is looking to lead the way in telehealth marketing, I would be honored to help you get the dots connected.

Please be in touch. And thank you for sharing this E-book.



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Marketing

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