A healthcare professional in blue scrubs is seated at a desk in a control room, monitoring multiple computer monitors. The monitors display various data, including patient video feeds and vital signs. The professional's scrubs have "St. Rose HOSPITAL OR" printed on the pocket. The background shows a clinical setting with medical equipment and papers.

Vidyo Telehealth Adoption Survey 2019

Remote Patient Monitoring and Telehealth Are Top Priorities; Budgets Expected to Grow



Vidyo®

Telehealth is a rapidly growing care-delivery method by which healthcare providers can engage remotely with their patients and their peers through the use of technology.



This report's objectives are to understand trends in telehealth adoption and offer insights and recommendations to providers that want to start a new program or expand an existing one.

In September 2018, **Vidyo surveyed nearly 275 North American healthcare professionals** who are involved in telehealth program design, implementation, and decision-making processes.

The survey targeted clinical practitioners, IT and telehealth administrators, and C-suite executives.

The survey was managed and administered by Hanover Research.

Key Insights

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Nearly 275 clinical and IT professionals

with decision-making authority over technology investments and practices reveal that **remote patient monitoring and telehealth** have become key to addressing the strategic objectives for most health systems.

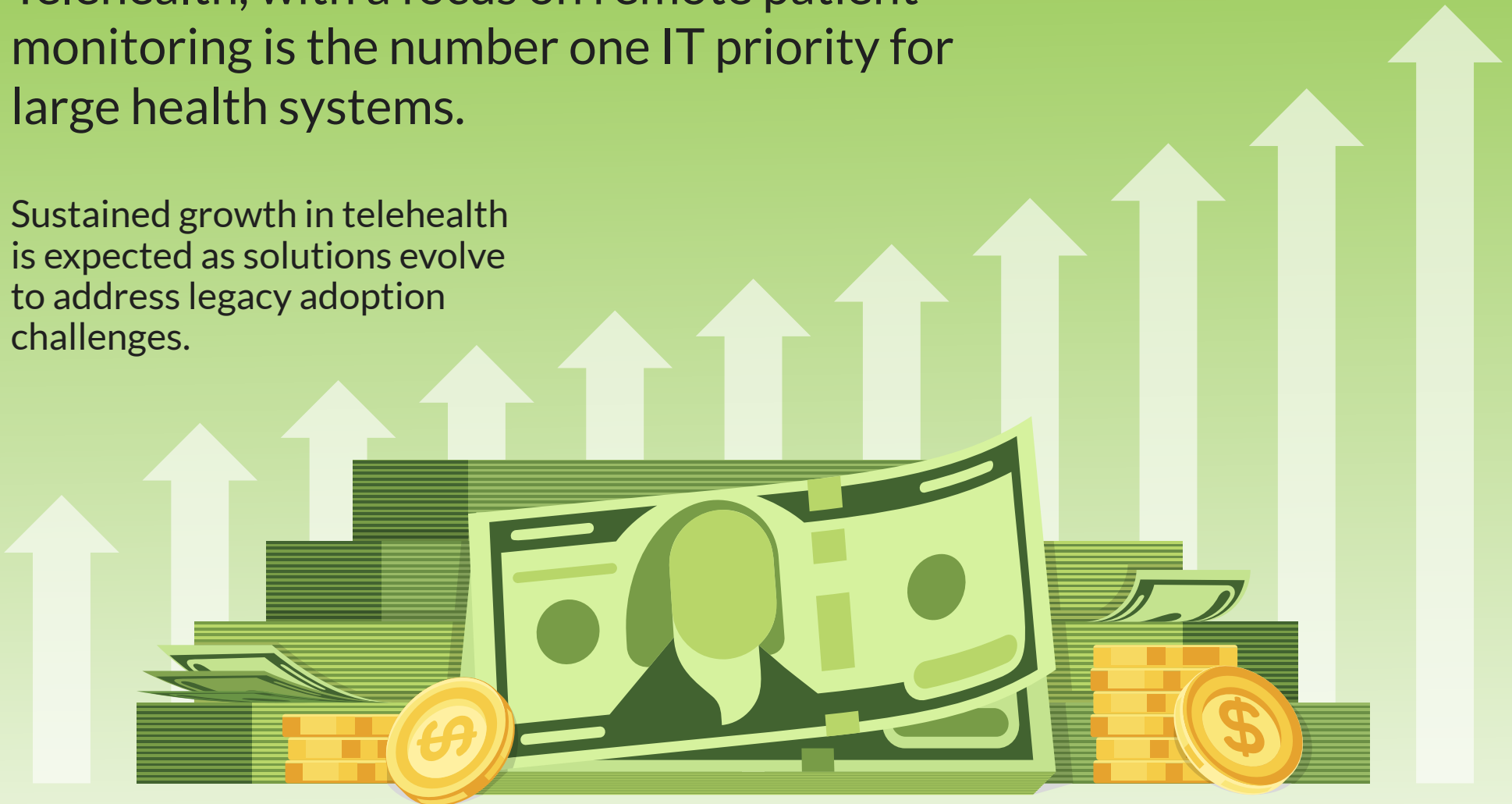




Telehealth #1 IT Priority

Telehealth, with a focus on remote patient monitoring is the number one IT priority for large health systems.

Sustained growth in telehealth is expected as solutions evolve to address legacy adoption challenges.



Two-thirds of respondents expect telehealth budgets to grow over the next three years.

Methods of Use

Top Three Use Cases by Method

FIGURE 1 : TELEHEALTH USE CASES

N = 273

Which of the following use cases have you used: remote patient monitoring, live video, or store and forward?

Remote Patient Monitoring



Chronic health management without peripherals



Acute care management with or without peripherals



High-risk patient management

Live Video



Virtual visits



Case collaboration



Training/distance learning

Store and Forward



Training presentations or videos



Digital images, X-rays, videos, or photos



Transmission of recorded health history

Remote Patient Monitoring and Live Video

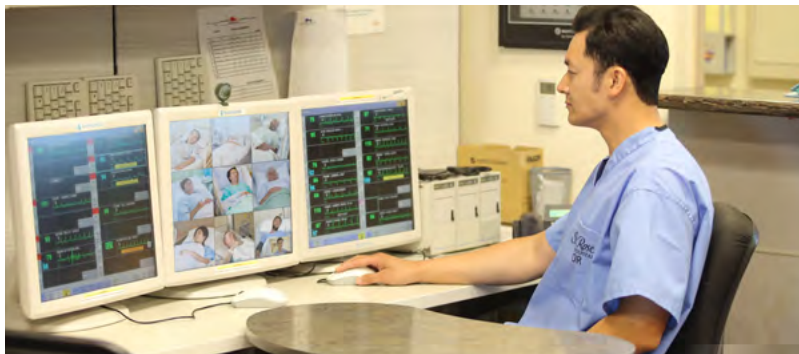
Remote patient monitoring and live video are the most-used methods, with 41% and 46% of respondents respectively, indicating their use.

FIGURE 2 : TELEHEALTH MODALITIES

N = 273

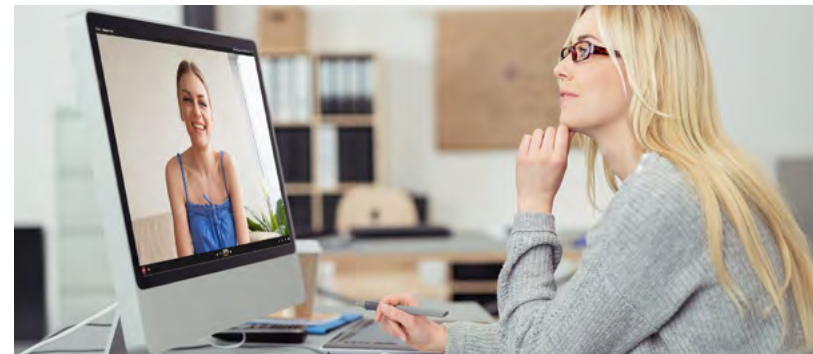
Which of the following modalities does your facility use?

Remote Patient Monitoring



41%

Live Video



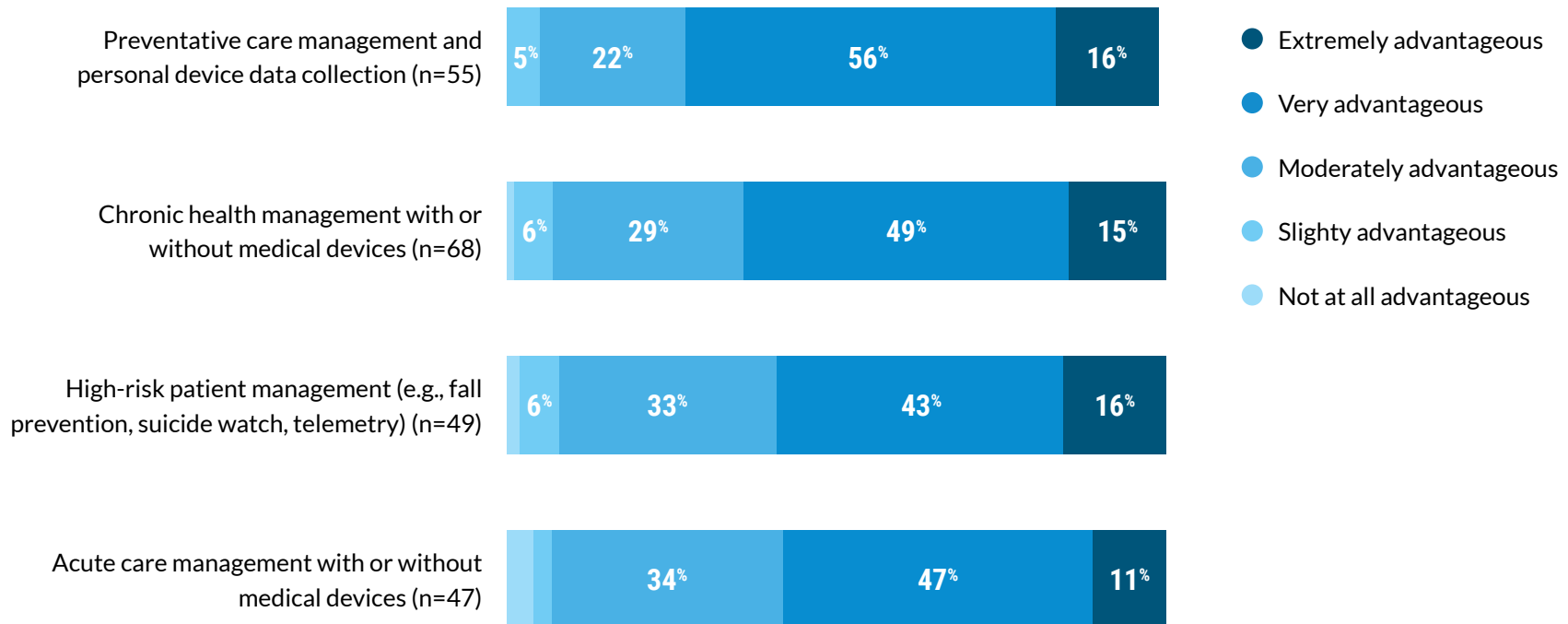
46%

Why are providers adopting remote patient monitoring?

Preventive care and chronic disease management lead in anticipated value for remote patient monitoring.

FIGURE 3 : REMOTE PATIENT MONITORING VALUE

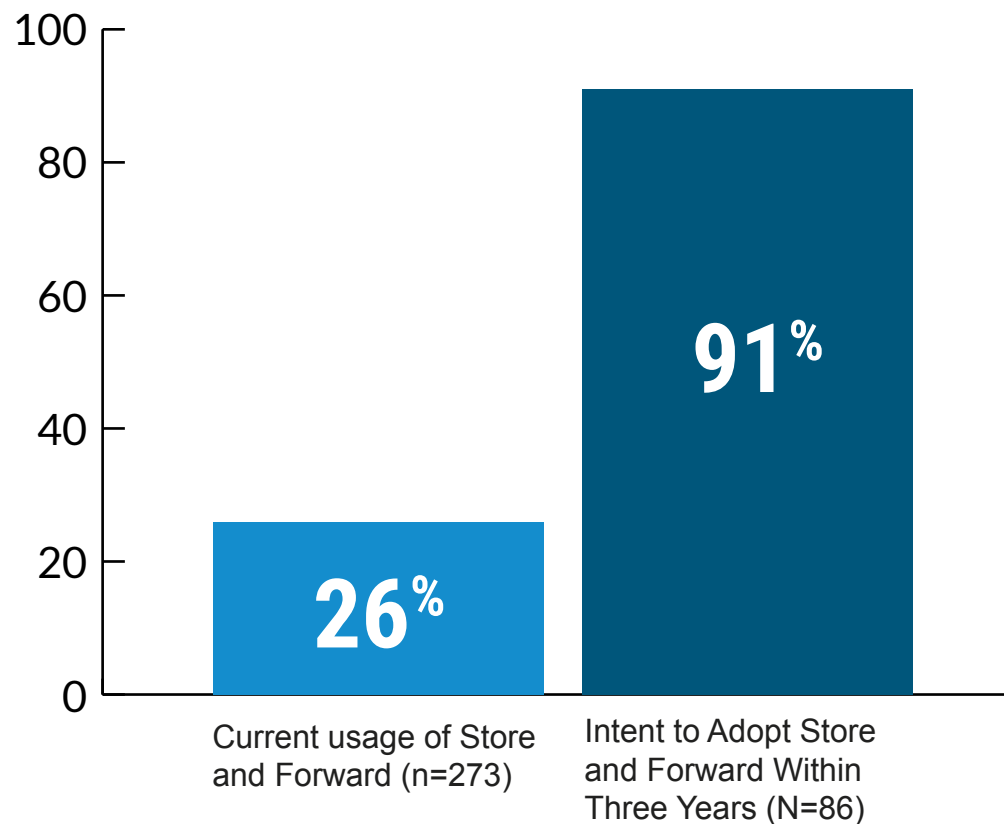
How advantageous do you anticipate remote patient monitoring will be for the following use cases?



Store and Forward?

While today only 26% of respondents use Store and Forward, 91% of respondents intend to adopt this method (more than all others) within the next three years.

FIGURE 4 :



Telehealth ROI and Budgets

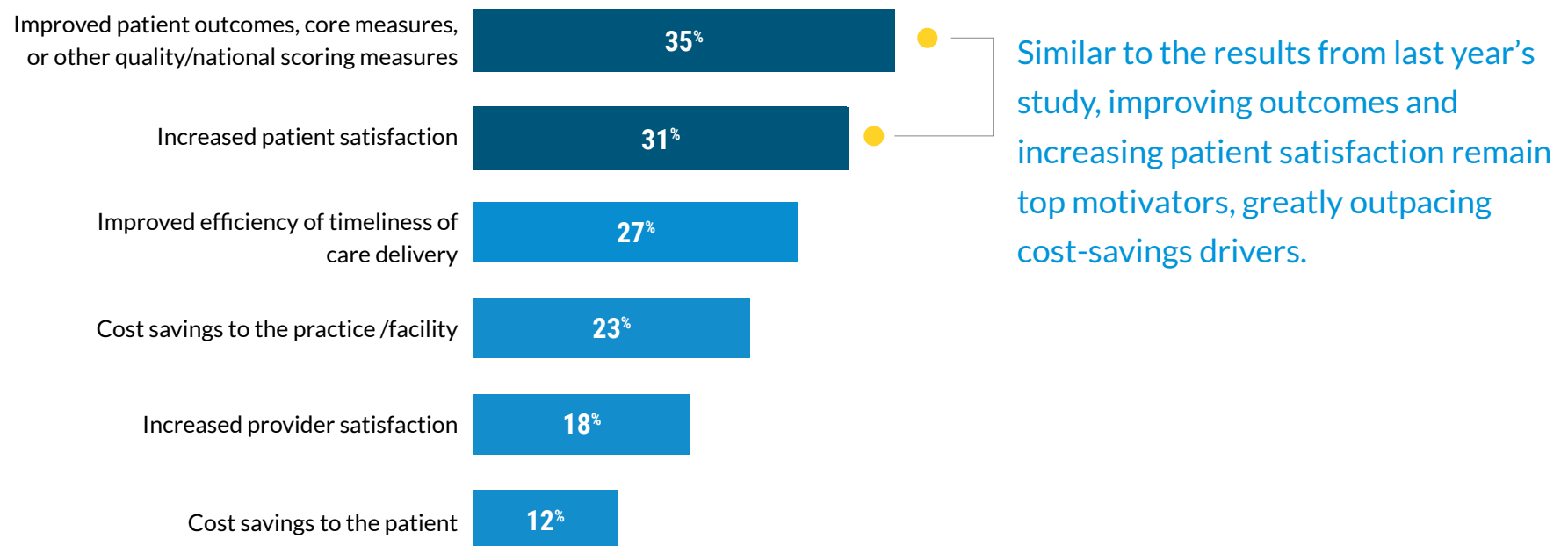
Top ROI Criteria

Outcomes and satisfaction lead. Cost savings lag.

FIGURE 5 : TELEHEALTH MODALITIES

Please rank the following ROI criteria in order of importance to your organization.

N = 273



IT Priorities

Remote patient monitoring and telehealth are strategic imperatives.

FIGURE 6 : IT PRIORITIES, RANKED

N = 101

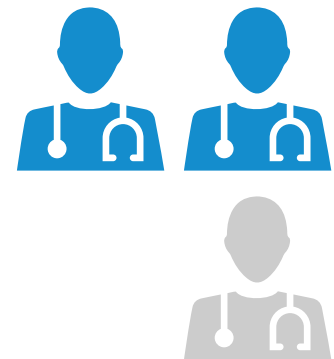
Please develop a list of IT priorities and rank telehealth among them. Rank them from highest to lowest priority.

- 1 Implementing remote patient monitoring and/or telehealth
- 2 Enhancing data security measures
- 3 Implementing EHR and patient portals



Telehealth Budgets Set to Grow

Two-thirds of healthcare professionals expect their telehealth budget to grow over the next three years.

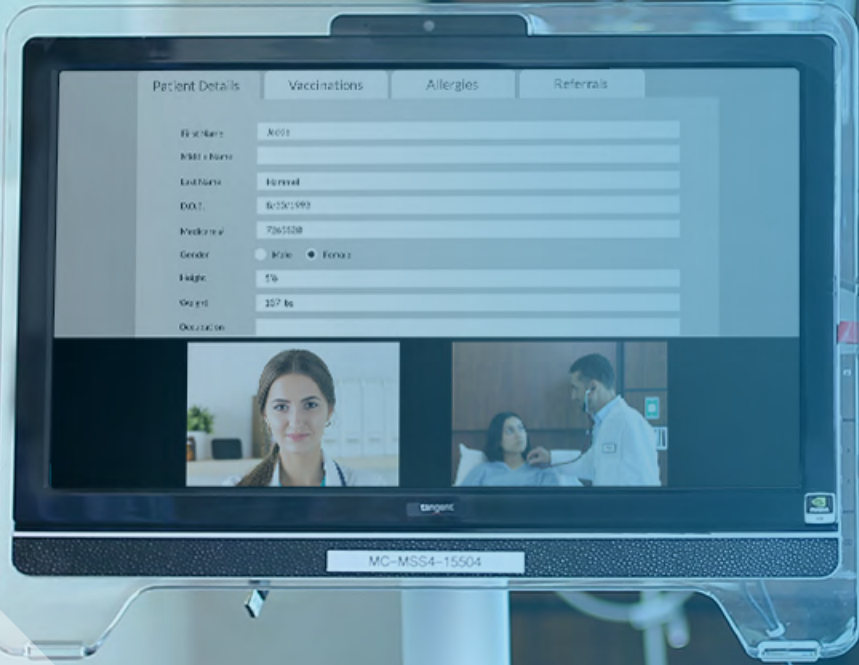


Respondents agree that IT executives and other administrators are most likely to lobby for investments.



Some respondents indicate that each clinical department has budgetary discretion – something to keep in mind if trying to start or expand a program.

Adoption



Intent to Adopt

Plans to adopt live video and remote patient monitoring remain strong

FIGURE 7 : PLAN TO ADOPT LIVE VIDEO N = 91
PLAN TO ADOPT REMOTE PATIENT MONITORING N = 98

When does your facility plan to adopt live video/remote monitoring as a modality?

Of those who have not adopted remote patient monitoring or live video, 85% expect to do so within the next three years.

85%




PLAN TO ADOPT



Keys to Adoption

As part of this survey, we wanted to better understand what is required to boost adoption. The most common area was reimbursement. Even though there is little an individual health system can do to effect change in this area, **health systems can and should leverage telehealth solutions to greatly reduce costs.**

Of the areas that are directly within their control, respondents identified the following as key:

-  Security and privacy
-  Ensuring telehealth solution integrates with EHR system
-  Assessing and addressing infrastructure issues



The good news:

You can address these by aligning program goals to organizational priorities and selecting the right partners for program development and implementation.



To learn more, get *Making Telehealth Work for You: The Ultimate Guide*, by Vidyo.

5 Adoption

Security and Privacy

Providers should carefully select the appropriate virtual health solution:

- Video-exclusive platforms can be more secure since they don't store patient health information.
- Make sure your partners are transparent about their capabilities and standards.
- Alleviate contractual and regulatory concerns with tele-consent forms and business associate agreements between vendor and provider.



Get the VidyoConnect security white paper.

Interoperability

Choose your platform wisely:



An open architecture allows you flexibility and customization.



Look for existing integrations into your EHR and clinical tools.



Select a platform with a **large ecosystem** of certified third-party partners that can easily extend capabilities.



Infrastructure

Plans to adopt live video and remote patient monitoring remain strong across all providers



Start small.
Then expand over time.



Consider a service line or
use case that aligns with
your organizational goals.



Specialty consultations
and behavioral health are a
good place to start.

Perspectives Matter

Keys to Adoption May Be Easier to Meet Than You Think

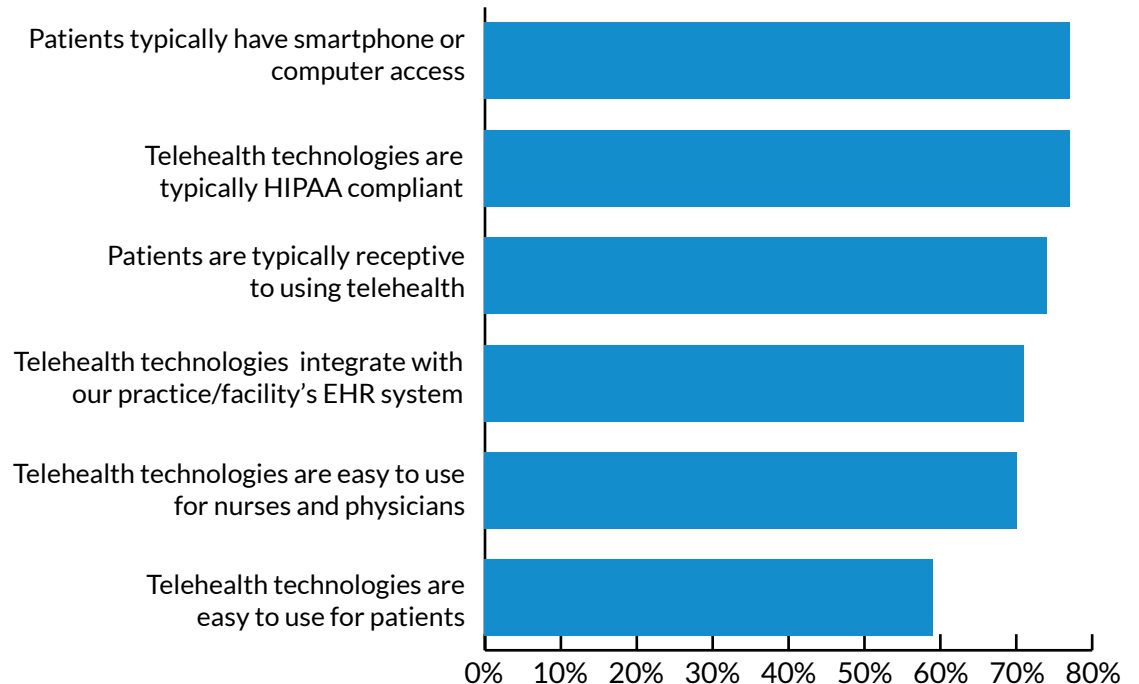
Larger facilities are significantly more likely than smaller facilities to agree that telehealth is HIPAA compliant, integrates into EHRs, and is easy to use for providers and patients.

They are over 2.5 times more likely to have deployed remote patient monitoring or live video than small facilities.

FIGURE 8 : LARGE FACILITY STATEMENT AGREEMENT

N=101

Percentage of large facility respondents who somewhat or strongly agree with the following statements.



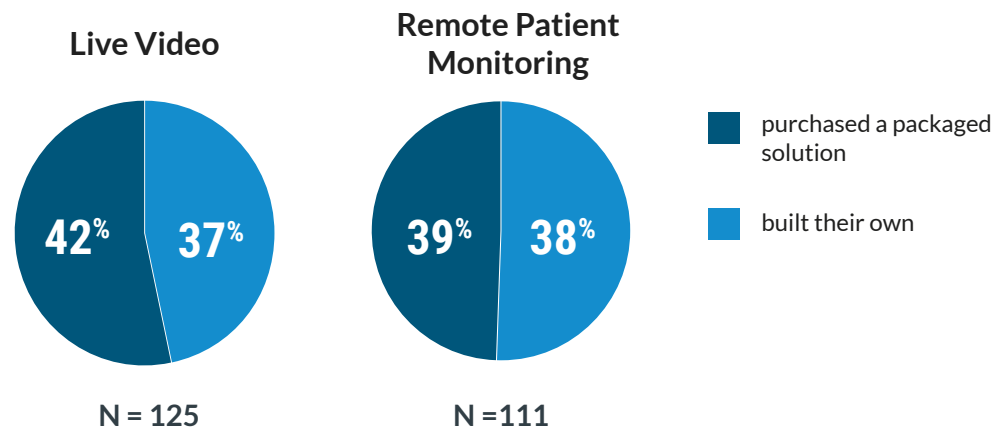
Implementation

Telehealth Development Strategies are Split

Providers indicate they are just as likely to build their own solution as they are to buy a packaged solution.

FIGURE 9: TELEHEALTH SOLUTION DEVELOPMENT

How did you develop and implement your telehealth solution(s)?



We expect to see more providers building their own solutions internally, or with help from system integrators, as embeddable video technology becomes more accessible to developers.

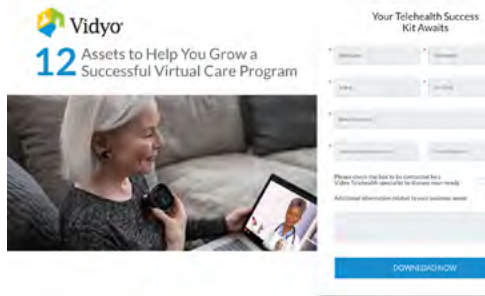


The ABCs of APIs

If you find yourself among the cohort of providers who are developing a solution internally, consider a communications platform-as-a-service (CPaaS) like vidyo.io, which enables developers to embed high-quality, real-time video capabilities without having to develop complex codecs.

What's Next? The Future is Now

1



Get Vidyo's Telehealth Success Kit

A collection of valuable content designed to help you plan and expand your virtual care program.

2



Take the Vidyo Maturity Model Assessment

Determine how your virtual care program stacks up.

3

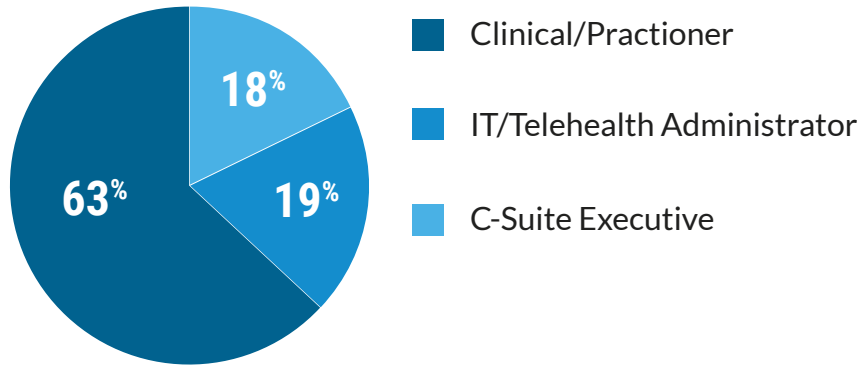


Most important of all: Get started.

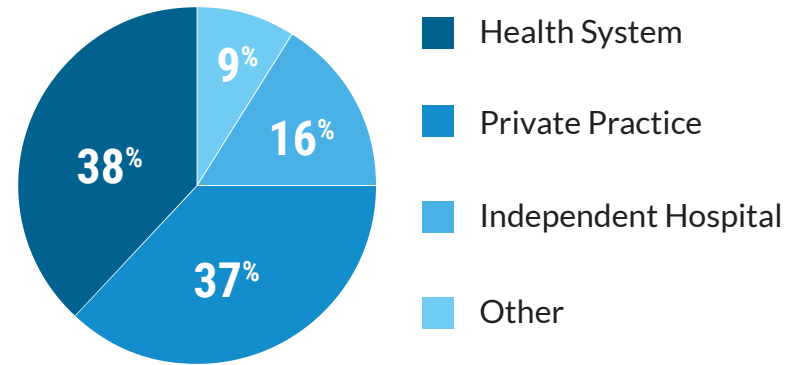
Discover what telehealth solutions can do to bring better patient outcomes and optimal ROI for all healthcare providers.

Respondent Profile Sample size: 273

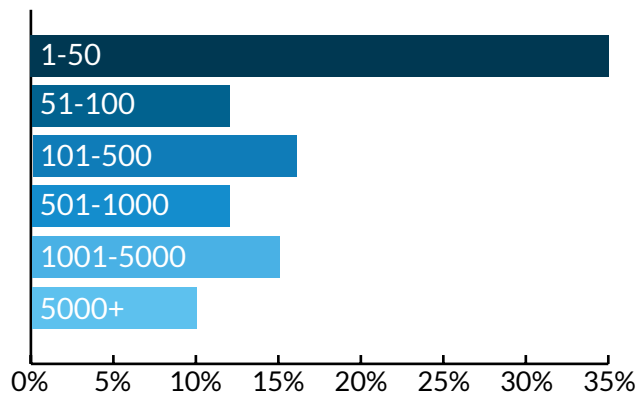
Job Function



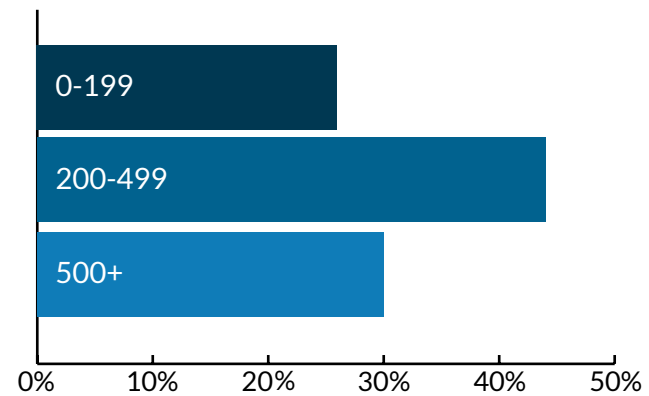
Setting



Number of Staff



Number of Beds





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