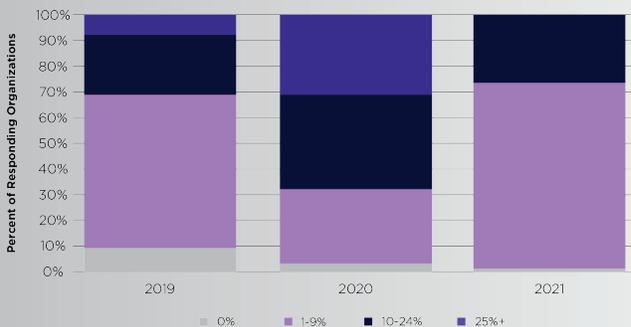


TELEMEDICINE SUPPLY AND DEMAND... IS HEALTHCARE STILL A LOCAL “THING”?

The percentage of patients using telemedicine services (DEMAND) is influenced by the percentage of providers offering telemedicine as part of their care delivery practice (SUPPLY). Read this report to explore how telemedicine use in the US varies by the supply of physicians offering telemedicine services.

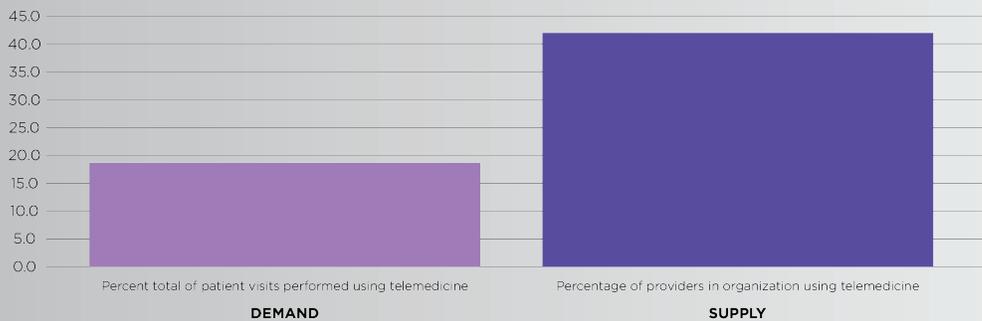
What percent total patient visits are performed using telemedicine?



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The percentage of patients using telemedicine services has increased since 2019. The volume of patients using telemedicine experienced a remarkable shift between the 2019 and 2020 survey periods. This of course can be tied to the onset of the pandemic. And will the trajectory of telemedicine usage generally increased in the 2021 survey, the “intensity” of its use appeared to recede somewhat (as evidenced by the diminished percentage of organizations reporting 25% or more of their patient encounters occurring via telemedicine).

What percent total patient visits are performed using telemedicine? What percent of your providers in your organization use telemedicine technology?

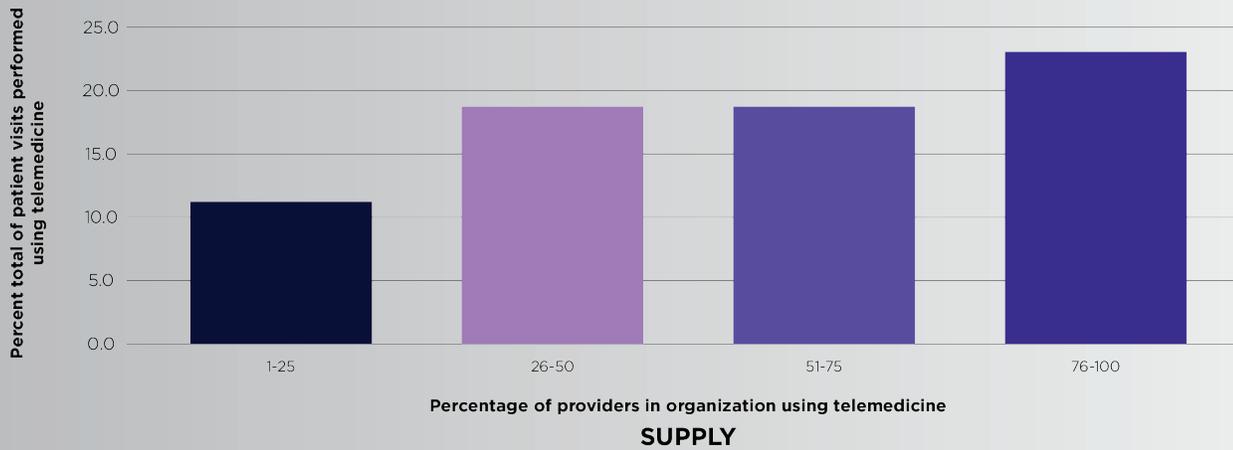


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The percentage of patients using telemedicine services (DEMAND) will be influenced by the percentage of providers in an organization integrating telemedicine as part of their care delivery practice (SUPPLY). It is therefore instructive to explore the relationship between provider SUPPLY and patient DEMAND. As evidenced below, the SUPPLY of providers leveraging telemedicine far exceeds patient DEMAND for telemedicine.

Drilling a little further into the data, we clearly see an expected association between provider SUPPLY and consumer DEMAND: as the percentage of providers in an organization offering telemedicine services increase (SUPPLY), consumer use of telemedicine (DEMAND) increases. The significance of this finding is that it provides insights into the potential volume of telemedicine visits an organization may experience as a greater percentage of affiliated providers leverage telemedicine in their practice.

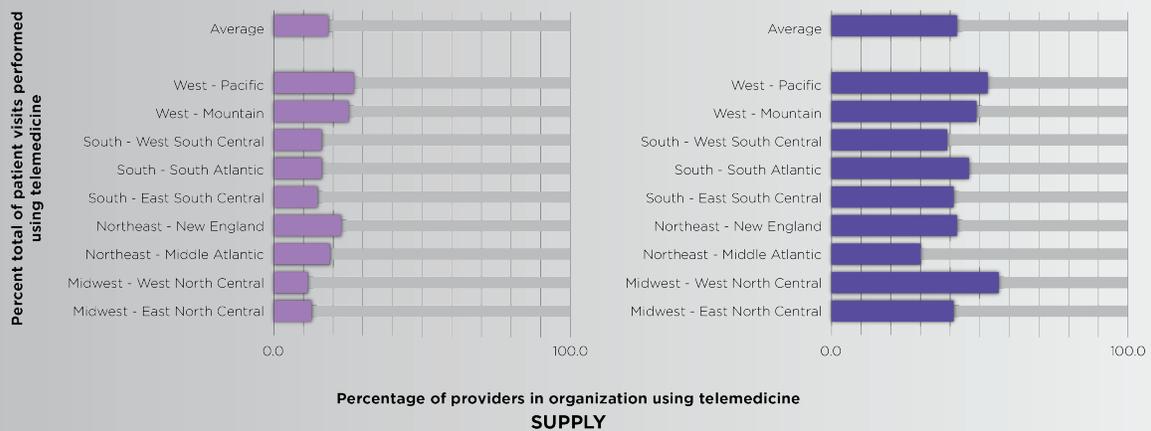
**What percent total patient visits are performed using telemedicine?
What percent of your providers in your organization use telemedicine technology?**



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Healthcare experiences vary by many factors, to include regional dynamics. This is especially significant to the discussion of telemedicine as proximity to a healthcare provider varies throughout the country. As such, it would be easy to posit that telemedicine plays a more significant role in geographically dispersed population areas of the country (e.g. the Midwest and West - Mountain parts of the country). As noted below, telemedicine SUPPLY exceeds patient DEMAND in all regions of the country.

**What percent total patient visits are performed using telemedicine?
What percent of your providers in your organization use telemedicine technology?**

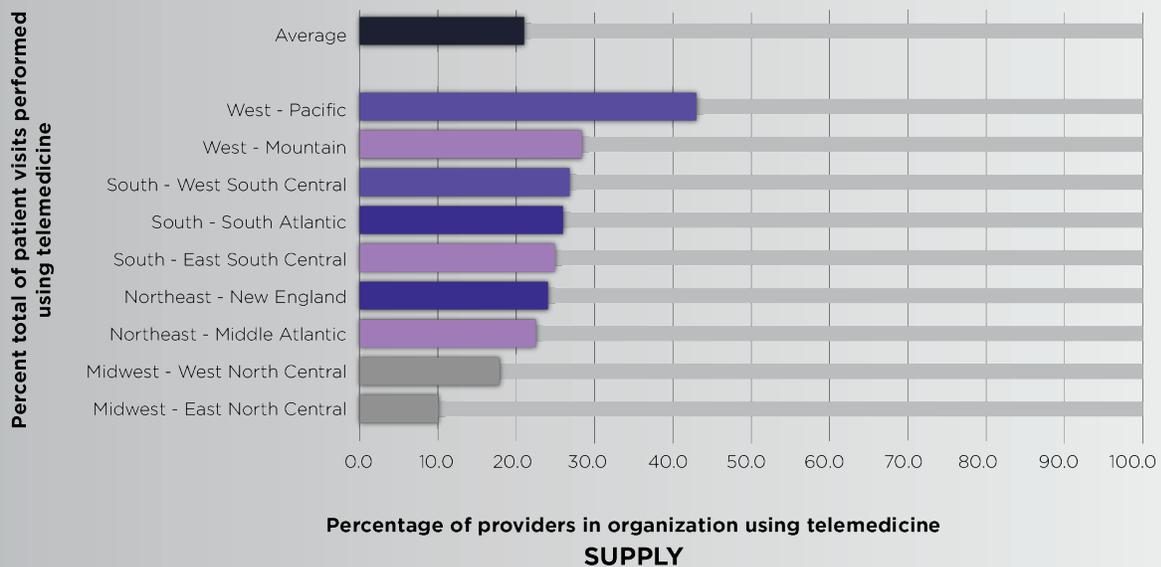


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Another way of looking at the data in the previous graph is to consider the divide between telemedicine Supply and Demand by region. The “gap” between these two factors offers valuable insights into the market’s alignment regarding telemedicine. Markets where the gap is the greatest (e.g. Midwest – West North Central) are arguably those markets most challenged in encouraging patients to leverage virtual care opportunities.

As evidenced below, the region of the country with the greatest concentration of people (Northeast) and by extension the population group with the closest proximity to a healthcare provider, presents as the most aligned telemedicine market in the U.S.

**What percent total patient visits are performed using telemedicine?
 What percent of your providers in your organization use telemedicine technology?**



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