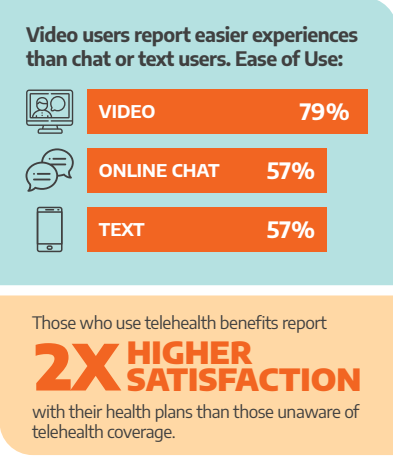


**Virtual Care Has Become Integral to Care Delivery**

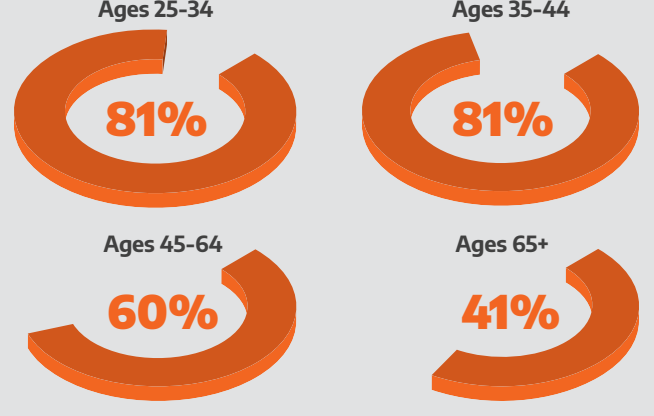
A June 2021 study among US adults with health insurance confirmed consumer perceptions of **convenience** and **affordability** translate into long-term adoption and a willingness to utilize virtual care in new use cases.



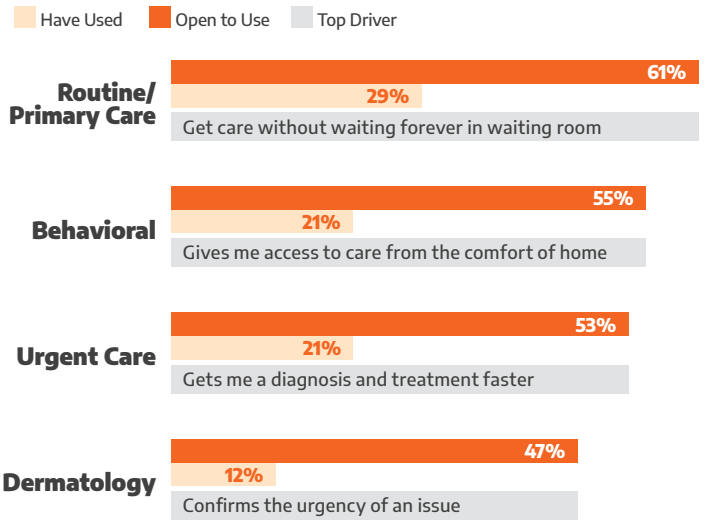
**Marketing Considerations for Different Member Populations**

Virtual care may skew toward a younger audience, but all age groups are open to using it. The insights below highlight the important similarities and differences in how each group seeks care information and uses telehealth in their care journey.

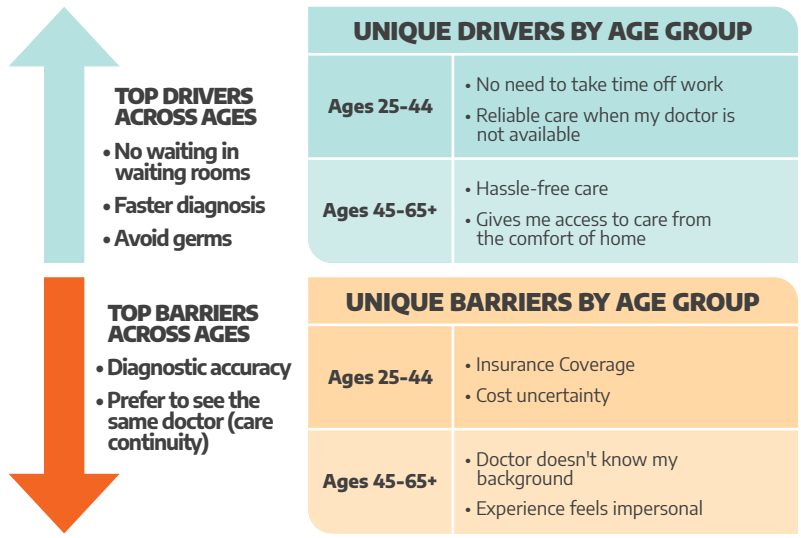
**PERCENTAGE OPEN TO USING VIRTUAL CARE**



**Virtual Care Drivers: Meeting Diverse Consumer Needs**



**Key Marketing Messages: Motivations & Barriers**



While virtual care use has increased meaningfully, there is still significant headroom to reach members who are open to using but haven't yet tried a virtual option.

Key messages are similar regardless of age: virtual care is convenient and cost-effective, with no commutes or long wait times in getting care. Younger consumers appreciate not missing work and need reassurance on coverage/cost. Older consumers appreciate comfort and less hassle while needing reassurance the virtual care experience feels personal.

**How Do Consumers Seek Information About Virtual Care?**

All age groups rely on health plans as reliable sources of information, highlighting the importance of communicating virtual care benefits. In addition, PCPs can influence supportive virtual care (e.g., behavioral health) for older members, and digital/online media can help influence younger members.

VIRTUAL CARE INFO SOURCES	TOTAL*	Ages 25-34	Ages 35-44	Ages 45-64	Ages 65+
<b>MY HEALTH INSURANCE COMPANY</b>	<b>51%</b>	Important	Important	Important	Important
<b>MY PRIMARY CARE PROVIDER</b>	<b>56%</b>	Less important	Important	Very important	Very important
<b>ONLINE SEARCH AND REVIEWS</b>	<b>31%</b>	Important	Important	Less important	Less important

\*Total respondents ages 18-64

Legend: Less important information source (White circle), Important (Light Blue circle), Very important information source (Dark Blue circle)

**The Virtual Care Services That Matter Most**

Consumers across all age groups look to virtual care for **routine care needs**, including wellness visits and Rx renewals. BH and urgent care are essential services as well, but BH should be prioritized with younger audiences.

**THE TOP 3 VIRTUAL CARE SERVICES CONSUMERS ARE OPEN TO USING, BY AGE GROUP:**

	Ages 25-34	Ages 35-44	Ages 45-64	Ages 65+
<b>1</b>	ROUTINE CARE	ROUTINE CARE	ROUTINE CARE	ROUTINE CARE
<b>2</b>	BEHAVIORAL HEALTH	BEHAVIORAL HEALTH	URGENT CARE	URGENT CARE
<b>3</b>	URGENT CARE	URGENT CARE	BEHAVIORAL HEALTH	BEHAVIORAL HEALTH