

## Predictions 2020: Invest In Virtual Care To Meet Soaring Patient And Member Demand In 2020



April 2nd, 2020 | Jeff Becker, Arielle Trzcinski

### At A Glance

- Consumers avoid traditional care — it's inconvenient, expensive, and scarce.
- Forrester predicts that virtual care visits will exceed 1 billion in 2020 due to the COVID-19 pandemic, ongoing care management, mental health needs, and the 2020 flu season.
- Economic and clinical forces will drive more virtual care enrollment.
- HCOs that don't deliver virtual care will face customer attrition.

### Consumers Face A Crisis Finding Quick, Cost-Effective Care

- Consumers wait an average of 24 days for an in-person appointment.
- Forty-four percent of Americans don't make appointments due to cost.
- Lack of available appointments leads to patient attrition.

### Virtual Care Visits Will Soar To More Than 1 Billion This Year In The US

The COVID-19 pandemic will forever change the face of healthcare, as a paradigm shift has occurred. The traditional barriers to adoption, such as awareness, cost, and regulation, are no longer valid in today's reality, and demand for telehealth (virtual care) will soar well beyond the period of crisis. Forrester recognizes the shift in consumer demand and has revised its original predictions for virtual care visits, including both physical care and mental health support.

We now predict that virtual care visits will soar to more than 1 billion in 2020. This new projection includes:

- **900 million visits related to COVID-19.** Many public health experts project the pandemic to continue into the summer months.
- **200 million visits related to general care.** This includes the 2020 flu season later in the year.
- **80 million visits related to mental health needs.** We anticipate a spike during the pandemic as citizens grapple at home with the stress and anxiety that come with a period of uncertainty.

The question is no longer about demand but rather providers' ability to give adequate support for consumers seeking this model. Forrester found that only 24% of US healthcare organizations (HCOs) had an existing virtual care program as of January 2020, and the most successful virtual care deployments prior to the pandemic [were able to shift more than half of their outpatient volumes to virtual care](#).<sup>(1)</sup>

Even without barriers like implementation cost and lack of reimbursement, HCOs can only shift so many of their providers to focus on virtual care during the pandemic, as acute cases are expected to increase and peak in late April. We expect time and resource constraints to create a supply crisis for virtual care during the pandemic.

Additional technologies, such as self-triage and screening tools, will help mitigate the demand surge and ensure that the most critical cases get the necessary care, and other capabilities such as remote monitoring and secure messaging will enable others to continue to care for themselves at home and manage their care safely with open communication.

HCOs investing in virtual care and self-triage will continue to reap the rewards through the end of 2020 and beyond as consumers seek a virtual-care-first model for everything from chronic care management to acute illness (such as the flu) to ongoing mental health support needs.

#### Sources

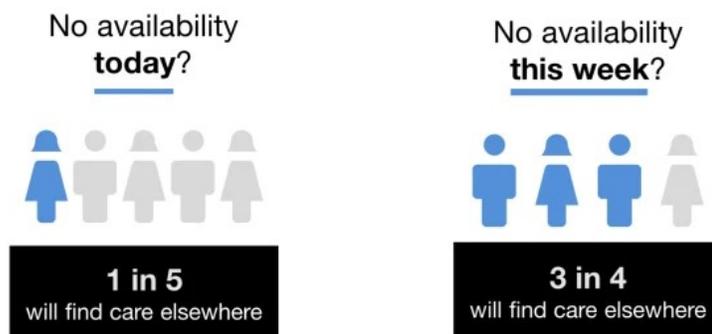
1. Forrester/HIMSS Q1 2020 US Experiential Healthcare Benchmark Survey.

## Virtual Care Will Enable Healthcare Organizations To Maintain Market Share, Patient Volume, And Population Health

- Large employers such as Walmart are advocating for employee adoption of virtual care; Amazon deployed its own virtual care offering for employees.
- Rapid adoption of these services will be critical in 2020 as healthcare organizations push to combat the clinical and economic impact of the lack of access to care.
- Healthcare organizations that don't provide access to virtual care will experience customer attrition in 2020 and beyond.

## Healthcare Organizations Must Focus On Convenient Care Options To Prevent Customer Attrition

Virtual care provides a way to **increase appointment availability**, stemming potential customer attrition.



Source: "2018 Consumer Healthcare Report: Rise Of The Practical Patient," Solv and the Urgent Care Association of America

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#### Related Resources

[Predictions 2020: Healthcare](#)

[The Forrester New Wave™: Virtual Care Solutions For Digital Health, Q2 2019](#)

**Forrester Recommends**

Health Insurers Must Invest In Virtual Care To Meet Consumer Demands

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