

DATA & ANALYSIS

Telehealth now a permanent fixture for U.S. healthcare delivery

Telehealth Adoption Trends 2 Years into the Pandemic & Implications for Provider Organizations

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<https://www.chartis.com/insights/telehealth-now-permanent-fixture-us-healthcare-delivery>

As we have tracked and analyzed telehealth adoption trends since the start of the COVID-19 pandemic, the staying power of telehealth has become clear. From its pre-pandemic position as a general outlier of clinical care model integration, telehealth has secured an ongoing role within the clinical domain.

Key findings of our latest analysis include:



Behavioral health specialties remain the clinical leader of telehealth adoption, which represents 57% of all outpatient visits within that clinical service domain. Many medical and some surgical specialties also have been transformed by telehealth adoption.

Telehealth Trend by Medical Specialty



Significant variation in telehealth adoption rates exist across states. In many cases, payment parity policies at the state level appear to bolster rates of sustained adoption.

Top & Bottom States for 2022 Telehealth Adoption Rate & Payment Parity Status



When it comes to modality, states lean heavily in one direction or another. Patients in states with the lowest video & audio use are the highest users of telephone telehealth visits.

Top & Bottom 5 States for Telehealth Visits in 2022 by Visit Type

	2019	2020	2021
Primary Care	12.5%	15.2%	18.7%
Specialty Care	8.3%	10.1%	12.9%
Emergency	5.1%	6.8%	8.5%
Behavioral Health	3.2%	4.7%	6.3%
Other	1.1%	1.5%	2.0%

What This Means for Provider Organizations

As provider organizations continue to set their course forward with telehealth, several considerations will be important:

- **Telehealth’s staying power underscores the importance of making virtual visits available to patients, even if utilization varies across service lines or patient cohorts.** While provider organizations could likely remain competitive without offering telehealth services in the pre-pandemic era, that is no longer the case—especially as new market entrants, like retail giants, make significant inroads toward building their own technology-enabled care models.
- **Telehealth is an important component to a successful patient retention strategy** since most virtual visits are being conducted with patients who have existing relationships with their providers. A broader swath of patient cohorts, some with distinctly more complex care needs, can be effectively managed once providers know more about their disposition and are familiar with their care plans, effectively cultivating a longer-term relationship with those patients.
- **Telehealth can be a viable solution in more clinical specialties and with broader patient groups than might be expected.** Beyond traditional roles in primary care and some medical specialties, telehealth is proving notably valuable across nearly all clinical disciplines. Likewise, telehealth can help providers reach new patient groups, like those who have limited English-speaking proficiency. Providers should consider the accessibility of telehealth services, given the popularity of these visits in geographic areas with fewer English speakers.
- **Providers looking to integrate behavioral health services into traditional access points like primary care or Emergency Department (ED) care should strongly consider a digital-first model of care for patients presenting with such needs,** given the widespread adoption of telehealth in behavioral health specialties.
- **Clear patterns in telehealth utilization are emerging to inform more efficient program planning at provider organizations.** As we enter the winter months when telehealth volumes tend to spike, it is imperative for providers that want to continuously meet the needs and preferences of their patients to plan accordingly with appropriate staffing and care models that account for predictable spikes in demand.

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