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Telehealth Varies by Market, with Champion in Behavioral Health

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Chartis and Kythera Labs are continuing to follow trends in telehealth adoption across the country. With the most recent data available through May 18, after an initially [rapid expansion of telehealth](#) in the first phase of COVID, we are starting to see some decline in telehealth adoption as shelter-in-place orders are starting to lift and phased reopening plans are initiated. A few highlights regarding what this latest data shows include:



Decreasing Utilization of Telehealth

Not unexpectedly, while total physician visit volumes are beginning to recover as practices reactivate, the relative proportion of telehealth visits is beginning to decline. By the week of May 18th, telehealth adoption declined to 29 percent (from a peak of 47 percent) of total physician visit volumes. This proportional shift is a result of both a significant increase in in-person care as well as decreased telehealth utilization in certain specialties.



Telehealth Adoption Varies by Market

As noted in our original [article](#), we've seen telehealth adoption trends vary by market based upon COVID-19 incidence and state and local guidelines for stay-at-home orders. Markets that reopened more quickly such as Dallas and Jacksonville saw adoption decline to 25 percent and 17 percent, respectively, whereas markets with a higher incidence of COVID-19 remained above the national average of telehealth adoption through mid-May, such as Detroit (42 percent) and New York City–Newark (45 percent).



Behavioral Health as a Telehealth Champion

Behavioral health has shown more resilience in sustaining telehealth utilization than have other specialties. As physician visit volumes for behavioral health/psychiatry begin to return, telehealth adoption is continuing to build momentum, reaching 64 percent as of mid-May. This suggests this specialty may have turned a corner in how to effectively embed telehealth within care models.



Telehealth for Pediatric Populations

Telehealth utilization varies for like-specialties in pediatric vs. adult populations. For example, during the week of April 11th, neurology specialists saw pediatric telehealth utilization spike to 79 percent vs. only 63 percent in the adult population. Notably, pediatric neurology telehealth utilization only declined to 69 percent, as compared to 46 percent for adults in the most recent week of data. Similar patterns are occurring across several other pediatric medical specialties, including gastroenterology and pulmonology.

As the telehealth landscape continues to evolve, we will continue to monitor the trends to answer key questions, including: When will telehealth visits level out and form a new status quo? Which specialties will continue to see higher levels of telehealth adoption in the long term? How is telehealth addressing or exacerbating health disparities between geographic, socioeconomic, racial/ethnic and other population segments?

Underlying data provided by Kythera Labs are sourced from clearinghouse claims vendors which comprise a national representation of submitted professional medical claims. These claims include self-insured and fully insured health plans across most major commercial payors and Medicare Advantage. The level of claims coverage varies by geography. Geographic and specialty utilization patterns may change over time based upon timing and mix of claims reporting by clearinghouse. Data is refreshed on a weekly basis, which includes data for the subsequent week, in addition to newly submitted claims from prior weeks.

Effective July 2020: Modified methodology has been implemented for geographic analysis, now defined based upon patient location.

Data excludes providers billing from US territories: Puerto Rico, Guam and the Virgin Islands. Telehealth adoption rates for multi-state CBSAs will aggregate into the respective telehealth adoption rate calculation, identified and assigned by the respective provider state. Physician specialties are determined based upon the specialty assigned to the rendering provider NPI. Certain physician specialties are combined or excluded to form the 20 specialties reported in the analysis. APP-defined practitioners have been excluded from this analysis. Percentage telehealth rate is calculated as the ratio of unique telehealth visits as a proportion of total physician visits.

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