

U.S. Virtual Visits Market - Industry Analysis & Forecast 2022-2027

Market Report | 2022-08-10 | 223 pages | Arizton Advisory & Intelligence

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Report description:

The U.S. virtual visits market is expected to grow at a CAGR of 27.74% during 2022-2027.

Virtual visits are helping make access to health care more convenient. A virtual visit is the use of technology that allows a patient to visit the physician or medical professional without having to come to a clinic or hospital and accounts for far less than the cost of a primary care office visit or an emergency room. With the increasing telehealth services utilization, there is also an increase in the adoption of virtual visit platforms. From 2017 to 2019, the virtual visit doubled for Health Action Council members.

The rising occurrences of chronic conditions such as diabetes, hypertension, and much more influence market growth. Virtual visits are useful tools for continuous monitoring of chronic conditions and treatment. Virtual visit services and technologies can help address current health issues in the US and, in turn, help deliver quality and convenient patient care. The key players in the virtual visit market are AMD Global Telemedicine, American Well, and Teladoc Health.

INCREASING IMPLEMENTATION OF TELEHEALTH KIOSKS IN U.S. HOSPITALS

The U.S. is highly implementing Wi-Fi-enabled telehealth kiosks in their hospitals attributed to increasing funding for vendors offering the telehealth kiosks, which has opened prospects for growth of the virtual visits market. Telehealth kiosk is a private, standalone virtual exam room equipped with medical devices such as thermometers, pulse oximeters, blood pressure cuffs, and many more.

VIRTUAL HOSPITALS: FUTURE OF HEALTHCARE

The virtual visit has transformed the healthcare industry by reducing hospital visits, reducing patient wait time, and decreasing the physical discomfort caused to patients. Many healthcare institutions are now adopting virtual healthcare because of its many benefits. Virtual hospitals help everyone, including patients, doctors, and hospitals. Mercy Virtual Care Center, based in the US, is the prime example of a virtual hospital, the first and only facility of its kind. Key elements of a virtual hospital solution:

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- A patient app: Schedule virtual visit appointments, message medical professionals to consult about the symptoms, track health state or symptoms and medication intake, request medication refills, view treatment plans, etc.
- An app for care team: Provide online patient consultations and examinations, suggest treatment changes, access, and evaluate patient's vitals, tests results, medical images, manage patients' medication, etc.
- A video streaming server: Real-time audiovisual communication between patients and the virtual hospital care team
- A cloud data storage and processing module: Store consultation recordings and analysis of patient data (e.g., device-generated data, treatment plans)
- An admin web panel: To manage user access to virtual hospital software, view the list of patients, and many more.
- Smart medical devices for patients: To provide the virtual hospital care team real-time data on vitals, medication intake, and many more.
- EHR/EMR: to provide immediate access to a patient's medical history, chronic conditions, allergies, and contact information for the virtual hospital care team, etc.
- Practice management system: To enable patients' access to the medical specialists' schedules, automate patient billing data entering into the system, and many more.
- Laboratory information system and medical imaging software: To enable an instant view of a patient's X-rays, CT scans, and many more and lab test results for the care team to make the decision on treatment adjustment, patient readmission to a hospital, etc.

VENDOR'S ACTIVITIES IN THE MARKET

The market is highly dynamic and fragmented with key players, including AMD Global Telemedicine, American Well, and Teladoc Health.

- Vendors are highly engaged in expansion activities to strengthen their position in the US.
- Forging partnerships and collaborations with well-established manufacturers cementing the footprints of the players.
- Vendors are highly focused on inorganic growth through mergers and acquisitions.
- A diverse range of virtual visits platforms, software, application, and other integrated devices and service support is offered.
- The market is experiencing a surge in product launches and technological advancements.
- Vendors are highly investing in developing integrated software & hardware or connected devices and software.
- Key vendors operating in the market have shown the potential to provide reliable healthcare platforms to a large pool of patients at low cost or even zero cost per visit with the qualifying insurance plan in the US, depending on the type of visit.
- Several new start-up companies are entering the market with increased funding.
- The key players are making huge R&D investments and developing innovative products.
- Leading companies are taking several initiatives to keep the market competitive. For example, American Well and Teladoc Health are forming business models that blend in-person and virtual, synchronous & asynchronous, human-driven, and automated into a hybrid care model.

IMPACT OF COVID-19 PANDEMIC

Throughout the COVID-19 pandemic, people have shifted to virtual visits for medical and behavioral care because of convenience, ease of schedule, and have been found safe to avoid crowded waiting rooms. Even after post-pandemic, it is expected that about 83% of patients will use virtual care.

At the start of the pandemic, the number of in-person visits fell dramatically while virtual visits increased overall, and virtual visits have seen a drastic growth. In 2020, virtual care quickly became an integral component of care delivery due to complete lockdown and the need for healthcare, mainly mental health. The sudden growth in virtual visits adoption is observed to be due to

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an increase in reimbursements and ease of regulations for telehealth services. Before the COVID-19 pandemic emergence, the adoption of virtual visits remained low due to a lack of reimbursement and internet connectivity. Virtual visits increased more than 200-fold from 14,000 in 2019 to 3.1 million in 2020. In 2020, with the surge in COVID-19 cases, 53% of US patients said they were more satisfied with live video than with previous in-person interactions.

SEGMENT INSIGHTS

Component

The service segment is the fastest growing by component, with the highest revenue of USD 3.91 billion in 2021, whereas hardware and software have generated USD 1.15 billion. Several vendors offer a wide range of services in various specialties. The healthcare providers offer services giving both the options of a scheduled or on-demand visit. The services have widely been adopted in the country and are further expected to gain momentum in the US in the coming future.

Application

General consultation is the fastest growing segment, with the revenue generated of USD 1.47 billion in 2021, and is expected to grow at a CAGR of 26.74%. During the pandemic, the US was the most hit country, and there was a complete lockdown in the US. The fear of getting COVID-19 infection within hospitals led to increased virtual visits in the US. The behavioral health segment is expected to grow at the highest pace in the forecast period, with the highest CAGR of 28.53%, which is attributed to increasing cases of mental health issues in the US because of the increasing elderly population. Also, there are increasing initiatives to support mental health virtual visit services. Hence, it is expected that it will grow at a very good pace. Sexual and reproductive health virtual visits are the least preferred service due to inadequate insurance coverage. Many platforms are not accepting Medicaid or other public insurance for this specialty.

Patient Group

Adults are the fastest growing segment because of their increasing use of virtual visits. A rising aging population and increasing chronic diseases have increased the demand for virtual visits. The use of virtual visit platform and services is very high among the adults in the US as the country has very good IT infrastructure, good internet access, awareness, and most insurance plans covers the cost of most specialty visits. Many companies, in collaboration with virtual visit providers, cover the cost of the visit of their employees. The pediatric group is likely to grow at a good pace with a CAGR of 28.62% in the forecast period.

Health Plans

The commercial or private health plan segment generated the highest revenue of USD 2.50 billion in 2021 and is expected to grow at a very good pace with a CAGR of 28.59%. Private health insurance coverage has been more prevalent than public coverage, covering about 68.0% and 34.1% of the population in 2019. Employer-based insurance has been the most common subtype. Most Medicaid programs pay the same for telehealth-delivered services as for in-person services. As compared, online and phone visits have witnessed an 8.64% increase in the reimbursement from Medicaid for online visit reimbursement from April 2020 to December 2020. The number of people without health insurance coverage increased in 19 states in the US between 2018 and 2019. All states, including the District of Columbia, have shown a lower uninsured rate in 2019 compared to 2010. In 2019, the percentage of people with employer-provided coverage was slightly higher, from 55.2% in 2018 to 55.4% in 2019.

Market Segmentation by Component

-□Service

-□Hardware & Software

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Market Segmentation by Application

- General Consultation
- Behavioral Health
- CCM
- Urgent Care
- Others

Market Segmentation by Patient Group

- Adults
- Pediatric

Market Segmentation by Health Plans

- Commercial
- Medicare
- Self-Paid
- Others

Key Vendors

- AMD Global Telemedicine
- American Well
- Koninklijke Philips
- Teladoc Health.

Other Prominent Vendors

- Baptist Health
- BetterHelp
- Blue Sky Telehealth
- CareClix
- Cerner
- CHI Health
- Chiron Health
- Cisco Systems
- CVS Health
- Doctor On Demand
- Doxy.me
- Eagle Telemedicine
- edgeMED Healthcare
- eVisit
- HealthTap
- K Health
- Masimo
- MDLIVE
- NextCare
- Nurx
- PlushCare
- Piedmont Healthcare

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- []Reкуро Health
- []RO
- []SOC Telemed
- []SteadyMD
- []Talkspace
- []Optum
- []Vidyo
- []VSee
- []Walmart Health Virtual Care
- []Zipnosis
- []98point6

KEY QUESTIONS ANSWERED

- 1.[]WHAT WILL BE THE MARKET SIZE OF THE U.S. VIRTUAL VISITS MARKET?
- 2.[]WHAT IS THE GROWTH RATE IN THE U.S. VIRTUAL VISITS MARKET?
- 3.[]WHO ARE THE KEY PLAYERS IN THE U.S. VIRTUAL VISITS MARKET?
- 4.[]WHAT ARE THE GROWTH FACTORS IN THE U.S. VIRTUAL VISITS MARKET?
- 5.[]WHAT ARE THE LATEST TRENDS IN THE U.S. VIRTUAL VISITS MARKET?

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