

Accelerating Change: **How consumers adapted to virtual health** **during the pandemic and what's next**

Presented: September 30, 2021



Today's Speaker



Advocate
Aurora
Health

Darrell Beneker

Director, Consumer Insights

Advocate Aurora Health

darrell.beneker@aah.org



75,000
TEAM MEMBERS



10,000+
VOLUNTEERS



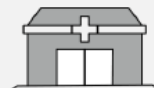
10,000
PHYSICIANS



3M
UNIQUE PATIENTS



26
HOSPITALS



500+
SITES
OF CARE



\$13B+
TOTAL
REVENUE



\$2.2B
COMMUNITY
BENEFITS
IN 2019



Top 12
NOT-FOR-PROFIT
HEALTH SYSTEM

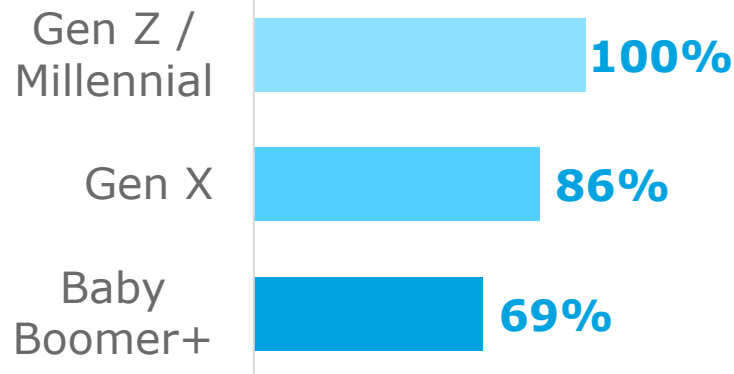
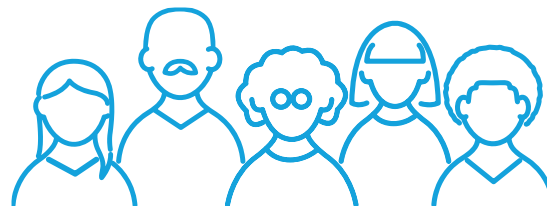
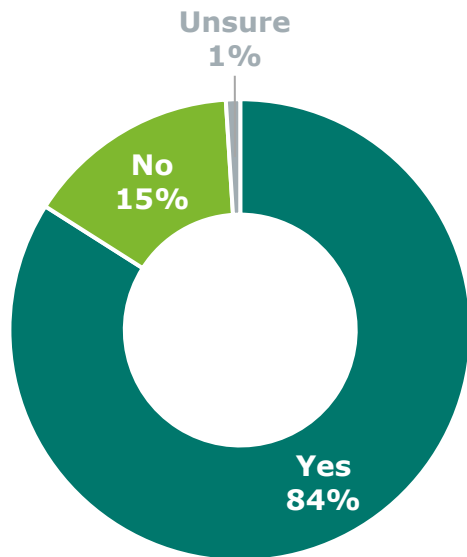


Top 10
*IN HEALTH
OUTCOMES

Information to Share

- Consumer adoption toward video chat
- Consumer experience and satisfaction scores
- Future of virtual health

Most Have Used Video Chat in General



There are many options to video chat on your phone or computer, such as Zoom, Skype, Apple FaceTime or Google Hangouts. Have you ever used video chat? n=787

Pandemic Prompted Many to Use Video Chat More

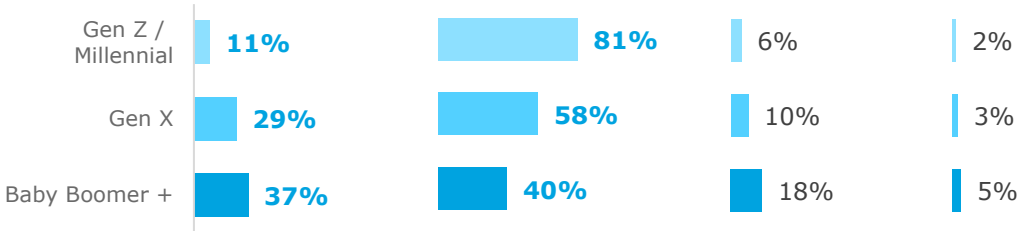


24% Tried for the first time

62% Used more

11% Used about the same

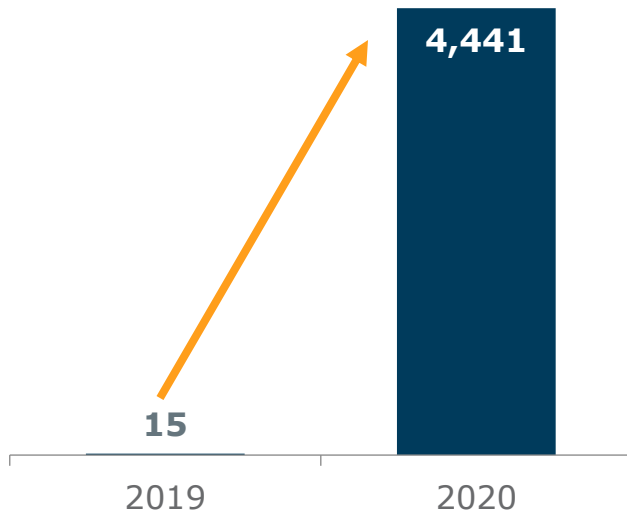
3% Used less



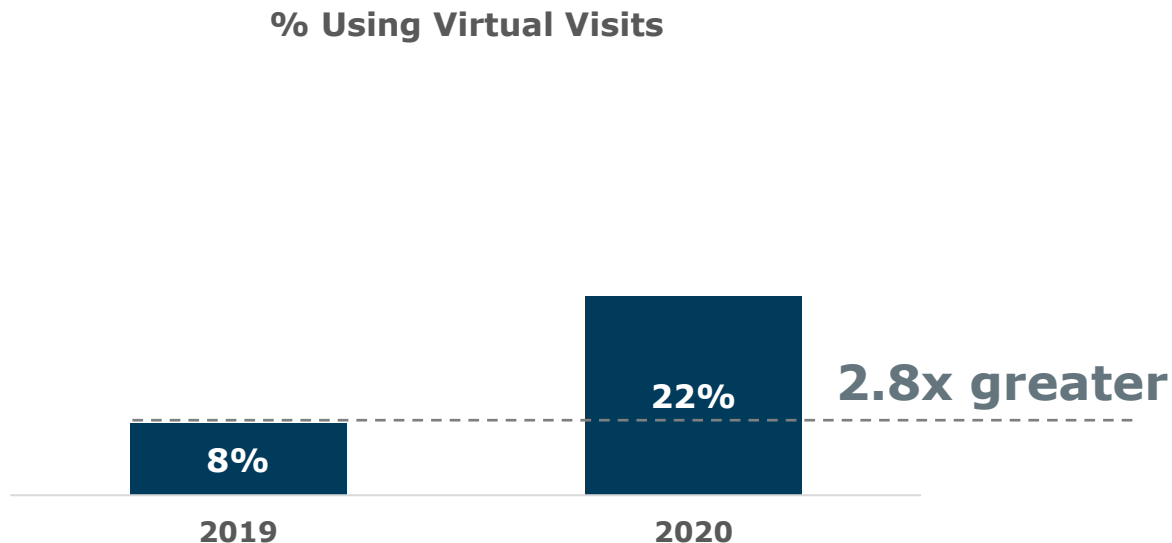
The pandemic stay-at-home orders had some people communicating differently. Which best describes how you used video chat over the past few months? n=570

Pandemic Forced Providers to Offer Video Chat

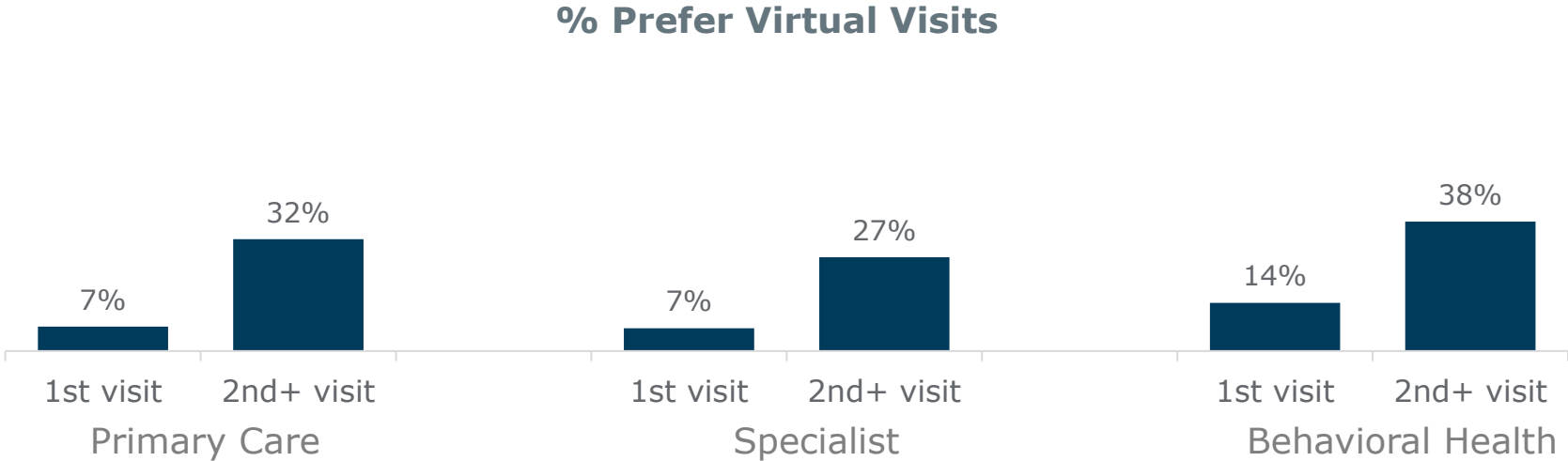
Advocate Aurora Providers
Using Virtual Visits



Consumer Adoption Towards Virtual Tripled



Patient Adoption to Virtual Visits Varies



As more virtual health care options emerge and clinics / hospitals are starting to open full access again, which do you prefer when seeking care from your provider - video visit or in-person / face to face? (5-point scale) n = 787

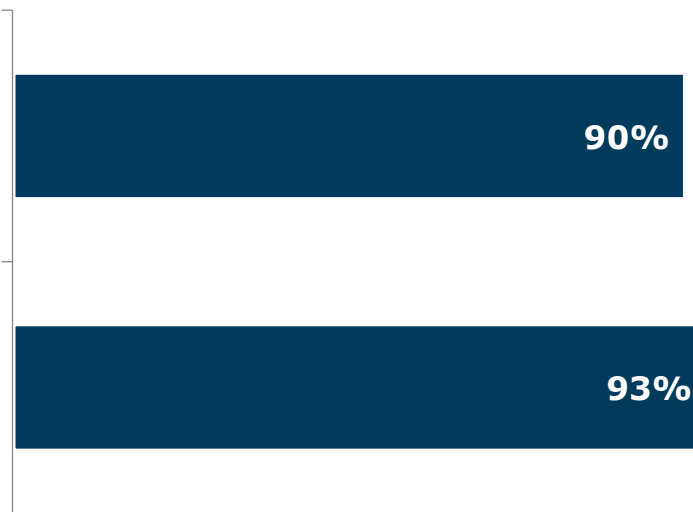
Easy to Check-in and Interact with Providers



Complete the check in process

Provider interaction

Ease of Video Visits



How easy or difficult is it to... n = 2,420

Most are Satisfied and Likely to Use Again

Satisfaction and Likely to Use Again Video Visits



Overall, how satisfied are you with your video visit?, n = 2,409 – 2,426
How likely are you to use Advocate Aurora Video Visits again? n = 2,409 – 2,426

Virtual Health Moving Forward

More Common for Select Specialties



More Competitors Outside of Health Systems

Technology companies
using data to enter
healthcare market and
consolidate capabilities



Retail organizations
expanding capabilities or
leveraging physical
footprint and targeting
healthcare deserts with
virtual services



DOLLAR GENERAL®

Reimagine OP Rehab

**Text Message to
Patient for On
Demand Scheduling**

**Service To
Order Written
by Provider**



**Care When
Consumers Want
It**



On-line



Phone

**Care Where
Consumers Want
It**



In Clinic



Virtual Visit



On Demand Visit



Home

Pediatric Care Expansion

Patients targeted include those at high risk, with need for frequent exams and/or difficulty transporting.

Current patient populations:

- Pediatric Complex Care
- Pediatric Pulmonology (High Risk Asthma and Cystic Fibrosis)
- Pediatric Allergy/Immunology (immunodeficiency patients)



Questions?