

# The State of Virtual Care

Presented by Omada Health and Digital Medicine Society



# Overview



Get an industry-level view of how buyers perceive virtual care in 2022.



Unpack the mindsets of '**Visionary Buyers**,' a savvy subset of buyers who leverage virtual care to increase patient engagement and optimize care outcomes.



Learn how these Visionaries choose care partners with smart criteria focused on evolutionary care delivery models.



Gain insight into Virtual-First Care (VIC), a care model gaining traction in the healthcare ecosystem, characterized by patient-centered solutions.



See how industry-leading VIC models achieve a proven impact on member outcomes.

# Telemedicine Accelerated During the Pandemic. *Where Do We Go From Here?*

There's a digital tool for everything, and healthcare is no exception. At the height of COVID, a digital tool widely known as telemedicine skyrocketed out of necessity; patients quickly adapted to replacing in-person appointments with video visits to satisfy social distancing measures.

Given the broad array of telemedicine and virtual care solutions offered today, The Digital Medicine Society (DiMe) and Omada set out to understand buyers' perception of virtual care offerings.

- How do buyers perceive virtual care?
- How well acquainted are they with the developing virtual-first system of care adopted by industry leaders?
- How can these perceptions shape market strategies for innovative health plans and providers?

We surveyed

**764 Buyers**

**528**

**Employers**

aka Employer Benefits Leaders

**107**

**Payers**

aka Health Plan Providers

**129**

**Consultants**

aka Benefits Consultants

Telemedicine use increased

**38X**

from the pre-COVID-19 baseline, as people were forced to take their doctor's visits online instead of in-person, according to [McKinsey](#).



WITH INSIGHTS FROM

**ROCK  
HEALTH**

Omada, in partnership with DiMe, and with insights from Rock Health, distributed an industry survey to understand how buyers view virtual care in 2022.





## Buyers Report Broad Experience With Virtual Care

Given the rapid expansion of telemedicine during the COVID-19 pandemic, it wasn't surprising that almost all buyers surveyed reported some level of experience with virtual care, or are offering a platform focusing on a specific condition. There is a near-universal openness to expanding offerings beyond the most common programs (diabetes, mental health, and weight management).



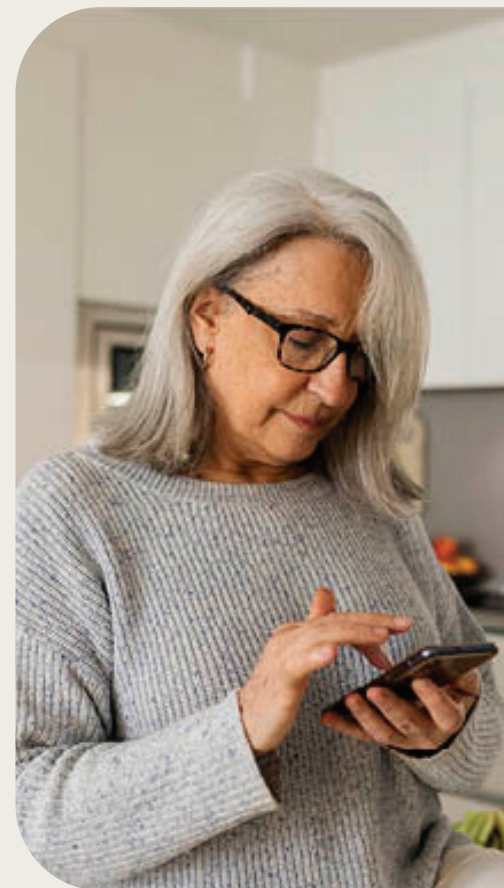
of buyers say they have some level of experience with virtual care



of those are offering a digital program for at least one condition



are offering programs that address chronic conditions



# And Most Buyers Are Optimistic about Virtual Care

Buyers also consistently expressed optimism about the possibilities of virtual care. Most employers, payers and consultants report that virtual care is a top priority for their organizations because they see its positive impact on workforces, including indicators like social determinants of health (SDOH). More than half of buyers also agree that virtual care is improving patient care and outcomes.

Buyers' Levels of Optimism About Virtual Care	Employers	Payers & Consultants
Virtual care is an extremely/very high priority	66%	69%
Virtual care is a real opportunity to transform healthcare in ways that positively address SDOH	56%	54%
Virtual care is a principal means of improving patient care and outcomes	53%	53%
Virtual care is here for the long term (regardless of COVID)	59%	51%

## However, They're Not as Enthusiastic About Its Larger Impact

When asked more specific questions about virtual care's influence on the industry, less than half of respondents reported positively.

Impact of Virtual Care	Employers	Payers & Consultants
Virtual care will drastically change/revolutionize how healthcare is provided and outcomes are achieved	29%	34%
Virtual care applications have barely scratched the surface, the sky is the limit in terms of what it may be in the future	36%	33%
Virtual care will become the main model of care for most situations over time	43%	40%

# Why Are We Seeing This Contradiction?

Most buyers today are only using telemedicine, which means that they lack the experience they may need to imagine use cases beyond this model. When they look to the future, they see more of the same. For example, less than half of employers have implemented remote monitoring devices.

	Employers	Payers & Consultants
Experience with telemedicine	83%	76%
Experience with health coaching	68%	75%
Experience with sensors & devices	45%	50%

While most buyers reported high levels of experience with and optimism about virtual care, the survey found that the term “virtual care” itself is understood to mean different things among these respondents. When asked more detailed questions about the functionality of virtual care, many buyers instead described the common characteristics of **telemedicine**.

There is some overlap between telemedicine and virtual care, but they are actually two different care delivery models. **Telemedicine** is the entry point for virtual care. It aims to replicate 1:1 the experience of in-person care in a digital environment without fundamentally changing the care journey. **Virtual care**, as described to our surveyees, aims to deliver a broader scope of remote healthcare services, including clinical and non-clinical support for a wide variety of conditions.



## Telemedicine

A digital replacement of conventional, in-person care.

- Delivered online or over the phone
- Based on the availability of the care team
- Siloed data collection and limited information sharing
- Limited opportunity for collaboration across care teams

vs.



## Virtual Care

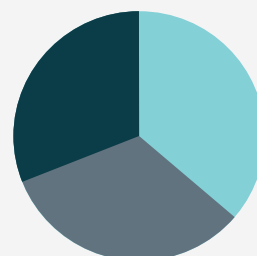
A broader scope of remote healthcare services, including clinical and non-clinical support.

- Delivered online via apps
- Patient support, education and engagement through coaches, specialists and/or AI
- May include at-home tests, treatments and remote monitoring
- Specialized care delivery for a variety of conditions

# A Cohort of Visionary Buyers Understand the Full Potential of Virtual Care

One-sixth of buyers report a deep understanding of virtual care beyond telemedicine.

These **Visionary Buyers**, made up of equal parts employers, payers, and consultants, agree that the healthcare ecosystem is poised to undergo tremendous change thanks to the innovations made possible by virtual care.



Visionary Buyers are made up of:

**36% Employers**

**33% Payers**

**31% Consultants**

## Revisiting the Impact of Virtual Care

Virtual care will drastically change/revolutionize how healthcare is provided and outcomes are achieved

Employers

**29%**

Payers  
& Consultants

**34%**

**Visionary Buyers**

Employers, Payers,  
& Consultants

**81%**

Virtual care applications have barely scratched the surface, the sky is the limit in terms of what it may be in the future

**36%**

**33%**

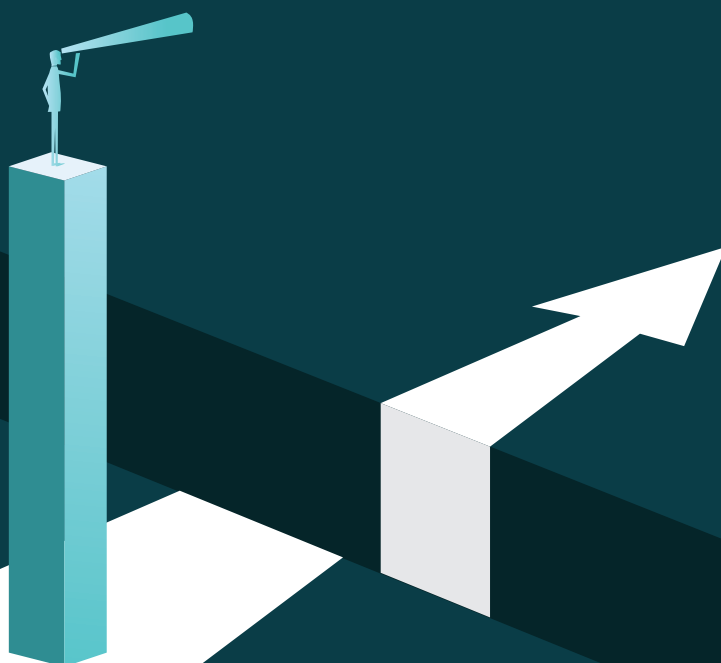
**74%**

Virtual care will become the main model of care for most situations over time

**43%**

**40%**

**82%**





# Visionaries' Priorities Illuminate the Virtual-First Care Model

Visionary Buyers want digital tools that do more than what telemedicine offers. Understanding their priorities can help other buyers evaluate virtual care offerings, and understand the developing model of virtual-first care (more on that to follow).

Visionary Buyers prioritize **three key characteristics of virtual care: Patient Engagement, Access to Data and Information, and Personalized Care Solutions.**



1.

## Visionaries seek out digital solutions that can impact **patient engagement.**

Patient engagement supports outcomes and is increasingly recognized as a primary objective of forward-looking healthcare. But buyers have struggled with digital tools that promise to improve patient engagement—only to fail at delivering results. Instead, Visionaries seek virtual-first care solutions that have a specific perspective on what activities, platforms, and tools engage patients, and include measurements that assess it. These solutions ideally release agile updates designed to optimize engagement based on assessment data.

2.

## Visionaries prioritize innovative and ethical **data collection.**

They see the potential for virtual care solutions to collect and share data in ways that help organize care plans around what is most critical to the patient at a specific time. They see how a seamless flow of information across the care team and with the patient may boost patient involvement and care team collaboration.

3.

## Visionaries adopt digital tools that improve **personalization.**

No two patients are the same. Cookie-cutter coaching apps and courses cannot respond effectively to every individual's case. Visionaries see a strong potential for integrated, real-time data systems to support personalization and optimization of care.



## Visionaries' Priorities Compared to More Traditional Buyers

	Visionary Scores
Better integration of patient information and data across the healthcare providers involved in a patient's care	+16 pts
Highly innovative future forward options for employee care and benefits	+15 pts
Ease of use of technology, engaging & enabling analysis and understanding for patient	+12 pts
Providing the best model of care for members	+12 pts
The opportunity to advance patient engagement in their care and outcomes	+10 pts

## Visionary Buyers See ROI Differently

Surprisingly, in contrast to more traditional buyers, Visionary Buyers are almost three times more likely to view ROI-measured as near-term cost savings per customer—as least important in the decision to adopt or expand virtual care options. Visionaries agree that virtual care makes sense regardless of the initial impact on cost savings. But Visionaries do focus on how virtual care can impact costs in the long term, by providing the best model of care to patients.

**68%** of Visionary Buyers believe that virtual care makes sense regardless of ROI measurement.



**58%** of traditional buyers believe that virtual care only makes sense if near-term ROI can be measured.



# From Virtual Care to Virtual-First Care

Visionary Buyers' priorities align closely with the developing model of virtual-first care (VIC),— yes, another term to grasp in this intricate paradigm. Stick with us here.

So what's the difference between virtual care and VIC? And why is knowing the difference important? First, a little background:

DiMe's IMPACT group, a consortium of investors, payers, patients, actuaries and VIC providers like Omada Health, is dedicated to defining VIC across the healthcare industry, creating standards in a currently open-ended industry, and expanding access to patients, healthcare providers, and payers to improve clinical and economic outcomes.



**“Virtual-first practices optimize care team workflows for efficient, effective remote care, and don’t require reverse-engineering into existing workflows.”**



**Jennifer Goldsack**  
CEO  
Digital Medicine Society

## Virtual-First Care: Patient-centered care, *where and when they need it.*

- Delivered through asynchronous digital communication channels
- Seamless data collection and sharing
- Care team collaborates on personalized care plans for each patient
- The right combination of virtual and in-person care

With VIC, patients are empowered to be an active participant in their care plan, with the aim of achieving the best possible clinical outcomes. Patients can initiate care anytime, anywhere, intentionally selecting the care setting matched to their clinical needs and preferences. Their data is ethically shared, and protected under all applicable standards of care, safety, security, privacy, and data rights.



of Visionaries say the ability to initiate care from anywhere at any time via digital technology is the most valuable aspect of VIC (vs. 31% of more traditional buyers).



of Visionaries think integration of information through digital platforms and tools so that an individual's data can be viewed, analyzed, and discussed collaboratively by their healthcare providers is the most valuable (vs. 39% of more traditional buyers)



of Visionaries believe that VIC will play a significant role in impacting patient care in the next 5 years (compared to 37% of more traditional buyers).

# Capturing the Promise of Virtual-*First* Care: Characterizing High-Value Partnerships

Choosing a virtual or VIC solution that aligns with your organization's Visionary aspirations can be difficult because vendors commonly position their products as virtual care, knowing that there is an appetite for this type of solution. Savvy buyers can spot the difference between telemedicine and virtual care (and VIC) by using the criteria that Visionaries employ to vet their provider partnerships.



## Does the partner offer programs that activate patients and get them engaged in their care?

How does the partner define and measure patient engagement? How does the partner plan to optimize patient engagement?



## How do they handle patient data?

Does the platform provide two-way data integration, connecting the patient, the larger care team, and the healthcare system? Do they have an ethical and clear plan for this data?



## Do they offer innovative options that deliver the best model of care?

Do care models prioritize customization? Is the partner actively testing new care delivery models?



## Do they validate hard ROI measures and value?

How does the partner measure and track financial and non-financial value to members and buyers?



**“There’s a difference between recreating an in-person approach with digital tools and designing the safest and most efficient way to achieve an optimal outcome.”**



**Sean Duffy**  
CEO & Co-Founder  
Omada Health

Learn more with IMPACT's VIC contracting toolkit:

<https://impact.dimesociety.org/toolkit/>

# Virtual-*First* Care Providers Lead the Industry

IMPACT's roster of industry-leading VIC providers are validating Visionaries' priorities. In alignment with its IMPACT peers, Omada's platform uses proven patient engagement strategies and cutting edge data science to deliver the best model of care to members and the best value to buyers.



## Patient Engagement

Building trusted relationships with members by leveraging the science of behavior change, clinical best practices, and proprietary data analytics. Coaches support lifestyle changes with proven techniques like motivational interviewing and shared decision making. The platform also uses data patterns to identify the most effective interventions for each member—and to deliver those at the right moment to prompt behavior change.



## Effective and Ethical Data Analytics

The platform is powered by the Omada Insights Lab, an internal data corps that collates expertise across multi-condition care pathways. With members' full consent, relevant care teams can view real-time member data, presented with context and clarity. This data informs collaborative, timely care plans. Omada rigorously updates its platform to optimize members' engagement and clinical outcomes.



## Best Model of Care

For many patients, support between office visits is necessary for staying healthy. Omada Health's human-led—not AI—coaching service communicates with members about their data, educates them on their unique conditions, helps manage medications, and helps them navigate their care. Care teams consistently review the effectiveness of individual interventions, the best of which are built into routine care workflows.

In collaboration with members' personalized care teams, Omada's platform is ready to assist members wherever they might be, whenever they may need care support.



## Value to Buyers and Members

The Omada Insights Lab continuously monitors outcomes and engagement tracking, including the cost effectiveness of individual interventions.

Hyper-focused on measuring health and economic outcomes, Omada Health has authored 24 peer reviewed studies and counting.

Learn how other IMPACT members implement the VIC model:

<https://impact.dimesociety.org>



# Case Study

## Virtual-First Care in Action: How one Visionary Buyer Improved Employee Engagement and Outcomes



Omada's fully integrated VIC solution for diabetes prevention and management is characterized by collaborative care teams, personalized support systems, and high patient engagement. Omada has helped many Visionary Buyers achieve convincing results for their workforces' health and wellbeing.

When Minnesota-based Federated Mutual Insurance Company noted rising prescription and care costs associated with chronic conditions, including diabetes, their HR department became concerned that a large number of employees may be at-risk for suffering from a chronic condition. Federated Insurance is committed to employees' success and wellbeing, and leadership prioritizes investing in the long-term health of its workforce.

Federated Insurance has the characteristics of a Visionary Buyer: they sought a solution that went beyond supplementary wellness programs and instead offered personalized care in a manner that was engaging and personalized to individual employees. Leadership recognized that these features are key for improving patient outcomes—and at Federated, the efficiency and efficacy of a solution is top of mind when considering a new benefit.

Federated Insurance's health plan provider and benefit consultant company referred them to Omada. They cited Omada's proven reputation for incorporating behavioral science in digital care to drive patient engagement and long-term health outcomes. Upon implementation, more than 80% of Federated's workforce who enrolled in the program were appreciative toward their employer for choosing Omada. And leadership was pleased with solutions to enrollment, engagement, and the quality of care that Omada delivered.

Omada's health coaches and certified specialists motivated and inspired Federated employees, guiding them to over

**2,300**  
pounds of total weight loss



Nearly  
**one-third**  
saw >5% total weight loss

**90%**

Employee Satisfaction  
with Omada's Diabetes  
Management Program



Federated employees  
sent more than  
**1,000**  
messages to Omada  
health coaches



Patients engaged with Omada on average  
**26.3** times per week



# When Virtual-First Care Engages Patients, Clinical Results Improve

We know that virtual-first care works, thanks to a foundational commitment to clinical rigor and precision. Omada's platform is proven to meaningfully impact chronic disease management outcomes. When choosing Omada, our members know that we are consistently measuring and working to optimize patient engagement and health.

## Engagement



Omada members who complete goals with the help of their care team are

**2.5X more likely**

to lose weight or improve blood sugar control.



Omada Coaches are

**10% more effective**

at re-engaging members than nudges.

## Outcomes



### Diabetes



**1.4%**

average decrease in hemoglobin A1C for members with an HbA1c of >9.0% at baseline



Improved medication adherence



Reduced diabetes distress scores



Decreased cholesterol



### Hypertension



**13.4 mmHg**

decrease in systolic BP for participants with stage 2 HTN at baseline



**7.7 mmHg**

decrease in diastolic BP for participants with stage 2 HTN at baseline



### Musculoskeletal

On a scale of 1-10, participants achieved:



**- 2.69 pt**

reduction in pain



**+ 2.67 pt**

improvement in physical function



# Conclusion

## Future-Oriented Benefits Packages Feature *Virtual-First* Care

Buyers today are inundated with vendors labeling themselves “virtual care providers,” regardless of the care model they’re selling. This phenomenon is blurring their perception of VIC’s potential impact, and what that means for improvements in healthcare delivery and outcomes.

VIC solutions like Omada Health are changing the market, supporting patients’ health through strong engagement, high-quality data science, and human-led care delivery. Visionary Buyers are accelerating the new era of VIC by making innovative and informed investments in their workforces’ health. At the same time, there’s still work to be done to paint a clearer picture for the industry.

Follow [Omada Health](#) for more learnings from the 2022 State of Virtual Care Industry Survey.

