What do patients really think of Telehealth? A study revealing authentic emotional responses using revolutionary voice capture and analytics



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Advocacy | Community | Professional Development

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Where Great Minds Meet





Fresh opinions on Telehealth from a range of patients.



Emotion analysis of voice data—qual depth at quant scale.

Positives, negatives and propensity to use during Covid-19 and beyond.

Audio responses and data visualizations of the emotion hidden in human speech.

What we'll share today

Telehealth predictions and learnings on voice tech for MR.

Is Telehealth here to stay? How did voice affect engagement and reveal new insights?





Methodology Survey of Rare Patient Voice's patient/caregiver panel with the option to answer by voice



Adoption of Voice

More Than Half



of patients/caregivers surveyed choose to answer by voice



Most respondents had participated in Telehealth recently Many had participated often (mean: four times; median: two times)

Two-Thirds Participated in the Last Three Months



Q1. Have you participated in a Telehealth appointment in the past three months, where you've had a doctor appointment remotely? N=494

Rare Patient Voice Patient Telehealth Study featuring voice capture and analysis by Phebi Ltd.; Sept. 2020 (C)

Most Participated as Patients



Is Telehealth here to stay?





Most respondents expect to take part in Telehealth more This is true both in the immediate and after Covid-19

86%

83%



Most respondents expect Telehealth to replace some or most appointments



While support for Telehealth is strong, it is also quite nuanced.





Safety, convenience and time saved are driving Telehealth usage



Which reasons in favor of Telehealth are most important to you?

Overall, patients gave Telehealth high marks

Q6.1. How satisfied were you with your most recent Telehealth experience? 1 - not at all satisfied to 10 - extremely satisfied.

Lack of precision vs. in-person is the top reason preventing use of Telehealth

Not as precise as in-person

Technology glitches

None

Not covered by my insurance

Not delaying treatment of symptoms

Concerns about security

Other

Lack of privacy at home

I don't have the right equipment

I don't like filling out electronic forms

Which reasons preventing use of Telehealth are most important to you?

Voice is like an emotional microscope revealing richer insights

Talking is faster and easier than typing.

Voiced responses were longer and richer.

Even from '30,000 feet,' new insights emerged.

What we found

Emotion scores are reliable and clear.

Beyond what people say, emotion reveals what they truly <u>feel</u>.

Consistent themes on pros/cons of Telehealth popped.

Talking is faster and easier than typing People want to engage by voice and when they do, they say more

Voiced Responses

> were significantly longer and richer than typed responses

Emotion scores are reliable and clear

High-level views reveal relationships and trends

Q19: Do you have any suggestions for improving this survey?

Beyond what people <u>say</u>, emotion reveals what they truly <u>feel</u>

HAPPINESS

We saw high levels of **happiness** related to:

- 1. Time saved
- 2. Convenience
- 3. Safety

I think that TeleHealth is perfect for the pandemic and is very much safer	
strong calm anxious happy sad	

- Even when **happiness** was the dominant emotion, it was tempered with concern around:
- 1. Missing the 'Human Element'
- 2. Desire to maintain option of in-person care
- 3. Insurance coverage

Beyond what people <u>say</u>, emotion reveals what they truly <u>feel</u>

We saw high levels of **anxiety** related to:

- 1. Less precise service and a desire to be examined in-person when needed/wanted 1. Time saved
- 2. Technology
- Insurance 3.

basically	ly I thought it took care of my needs but there are certain doctors that I need to see in person and I dc Sav
strong calm anxious happ sad	ng course

ANXIETY

- Even when **anxiety** was the dominant emotion, it was tempered with satisfaction around:
- 2. Convenience
- 3. Safety

Beyond what people <u>say</u>, emotion reveals what they truly <u>feel</u>

People talk differently from how they type. In a handful of instances, stream of consciousness-style input and repetition signaled strong feelings and deep concern.

Can you guess this woman's top concern?

I think Telehealth will replace eventually in-person patient health and the only drawback to that is when you have when you need a physical exam so I do believe that we still should have physical exams if you have say a nodule that needs looked at or a physical exam so I do believe that physical exams are still important and Telehealth is good for minor health issues and things like that but overall I still believe we still should have in-person exams.

REPETITION

7. Telehealth is here to stay.

Overall, people are strongly supportive, yet providers should take care to address pain points and anxieties. 2. Voice data illuminates valuable new insights at scale.

Understanding patients on a deeper, emotional level naturally drives better care and business decisions.

Takeaways and future implications

3.

Researchers will move to track what patients feel in addition to what they <u>say</u>.

Feelings and comfort levels evolve quickly; those who track them will be two steps ahead.

Questions?

Rare Patient Voice's Patient/Caregiver Panel 114+ diseases represented

Acne	Bipolar	Ehlers-Danlos Syndrome (EDS)	Headache	Irritable Bowel Syndrome (IBS)	Myelodysplastic syndrome (MDS)	Polychrondritis	Sepsis
Addison's Disease (Adrenal insufficiency)	Bronchitis	Endometriosis	Heart Disease	Juvenile Arthritis (JA)	Narcolepsy	Polycystic Ovarian Syndrome (PCOS)	Short Bowel Syndrome (S Short Gut)
Allergies	Cancer	Eosinophilic Esophagitis (EOE)	Hemophilia	Kidney Disease	Neuromyelitis optica (NMO)	Polymyalgia Rheumatica (PMR)	Sickle Cell Disease (SCD
Amyotrophic Lateral Sclerosis (ALS)	Celiac Disease (CCD)	Epilepsy	Hidradenitis Suppurativa (HS)	Low Blood Pressure (Hypotension)	Neuropathy	Posttraumatic Stress Disorder (PTSD)	Sjogren's Syndrome (SjS
Anemia	Chiari Malformation (CM	Erectile Dysfunction (ED)	High Blood Pressure (Hypertension HBP)	Lupus	Obesity	Primary Immunodeficiency (PID)	Sleep Apnea (OSA)
Ankylosing Spondylitis (AS)	Chronic Fatigue Syndrome (CFS ME)	Fabry disease	High Cholesterol (Hyperlipidemia)	Mastocytosis (Mast Cell Activating Disease MCAD)	Organ Transplant	Psoriasis Psoriatic Arthriti	Spina Bifida (SB)
Antiphospholipid Syndrome (APS)	Chronic obstructive pulmonary disease (COPD)	Fibromyalgia (FM)	ніх	Mental Illness	Osteoarthritis (OA)	Pulmonary Arterial Hypertension (PAH)	Spinal Muscular Atroph (SMA)
Anxiety	Chronic Pain Back Pain	Gastroesophageal Reflux Disease (GERD)	Hyperparathyroidism	Methicillin-Resistant Staphylococcus Aureus (MRSA)	Pancreatitis	Pulmonary Embolism (PE)	Stomach Ulcer
Asthma	Cognitive Impairment (CI)	Gastroparesis (GP)	Hypersomnia	Migraine	Paralysis	Pulmonary Fibrosis (PF)	Stroke
Atrial Fibrillation (AFIB)	Crohn's Disease (CD)	Gluten Intolerance	Hypothyroidism	Mixed Connective Tissue Disease (MCTD)	Parkinson's Disease (PD)	Rheumatoid Arthritis (RA)	Thyroid Nodule
Attention Deficit Hyperactivity Disorder (ADHD ADD)	Cystic Fibrosis (CF)	Gout	Immune Thrombocytopenic Purpura (ITP)	Multiple Sclerosis (MS)	Paroxysmal Nocturnal Hemoglobinuria (PNH)	Rosacea	Trichotillomania (TTM)
Autism	Depression (MDD)	Graft Versus Host Disease (GVHD)	Insomnia	Muscular Dystrophy (MD)	Pelvic Floor Dysfunction	Sarcoidosis	Ulcerative Colitis (UC)
Autoimmune Disease	Diabetes (DM)	Grave's Disease (GD)	Interstitial Lung Disease (ILD)	Myasthenia Gravis (MG)	Plantar Fasciitis (PF)	Scleroderma	Von Willebrand Diseas (VWD)
Avascular Necrosis (AVN Osteonecrosis)	Dysautonomia	Hashimoto's Disease (HT)	Intracranial Hypertension (IH Pseudotumor Cerebri)	Myelin oligodendrocyte glycoprotein Antibody- Associated Disease (MOG- Ab)	Pneumonia	Secondary Adrenal insufficiency	Waldenstrom's Macroglobulinemia (WN
Barrett's Esophagus	Eczema (Atopic Dermatitis)						

