
CANADIAN
ATTITUDES ON
HEALTHCARE AND
TELEMEDICINE

FULL REPORT
2020 Edition

ENVIRONICS
RESEARCH

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INTRODUCTION

This report is published by Environics Research following a Canada-wide survey, conducted to understand Canadians' attitudes toward healthcare and telemedicine. The research was sponsored by Dialogue; however, the sponsor of the research was not shared with respondents, ensuring unbiased data collection.

The survey was completed by 1,514 Canadians – representing all age groups and all provinces (except Nunavut, Northwest Territories and Yukon Territories) – between September 4th and 21st 2020.

This is the first in a planned series of annual reports exploring Canadians' perceptions and opinions about virtual healthcare and telemedicine. Environics Research will work with Dialogue to measure evolving public attitudes on this topic in the years ahead.

SUMMARY OF KEY FINDINGS



Getting fast, convenient access to healthcare is a frustration for many Canadians. COVID-19 has exacerbated existing challenges, with Canadians reporting that the pandemic has made it more difficult to access care in a timely and efficient way.

Virtual healthcare is a potential solution to some of these frustrations, and a majority of Canadians would like to see employers include such offerings in employee benefit plans. Employers need to choose telemedicine options carefully, however, as Canadians have high expectations for these services – and employees may decline to use platforms that lack features they care about.

Accessibility (through a benefit plan), scheduling convenience, choice of channel for appointment, mental health support and follow-ups are among the most important factors contributing to virtual healthcare use. These factors should be key considerations for employers evaluating different telemedicine options as they work to support their teams' health and demonstrate their commitment to corporate wellness.

DETAILED FINDINGS

ACCESS TO HEALTHCARE IN CANADA

Canadians rightly take pride in their public healthcare system, which provides universal access and high-quality care across a country with vast geography and a diverse population. However, as they navigate the mechanics of accessing care, many Canadians encounter challenges with convenience and efficiency.

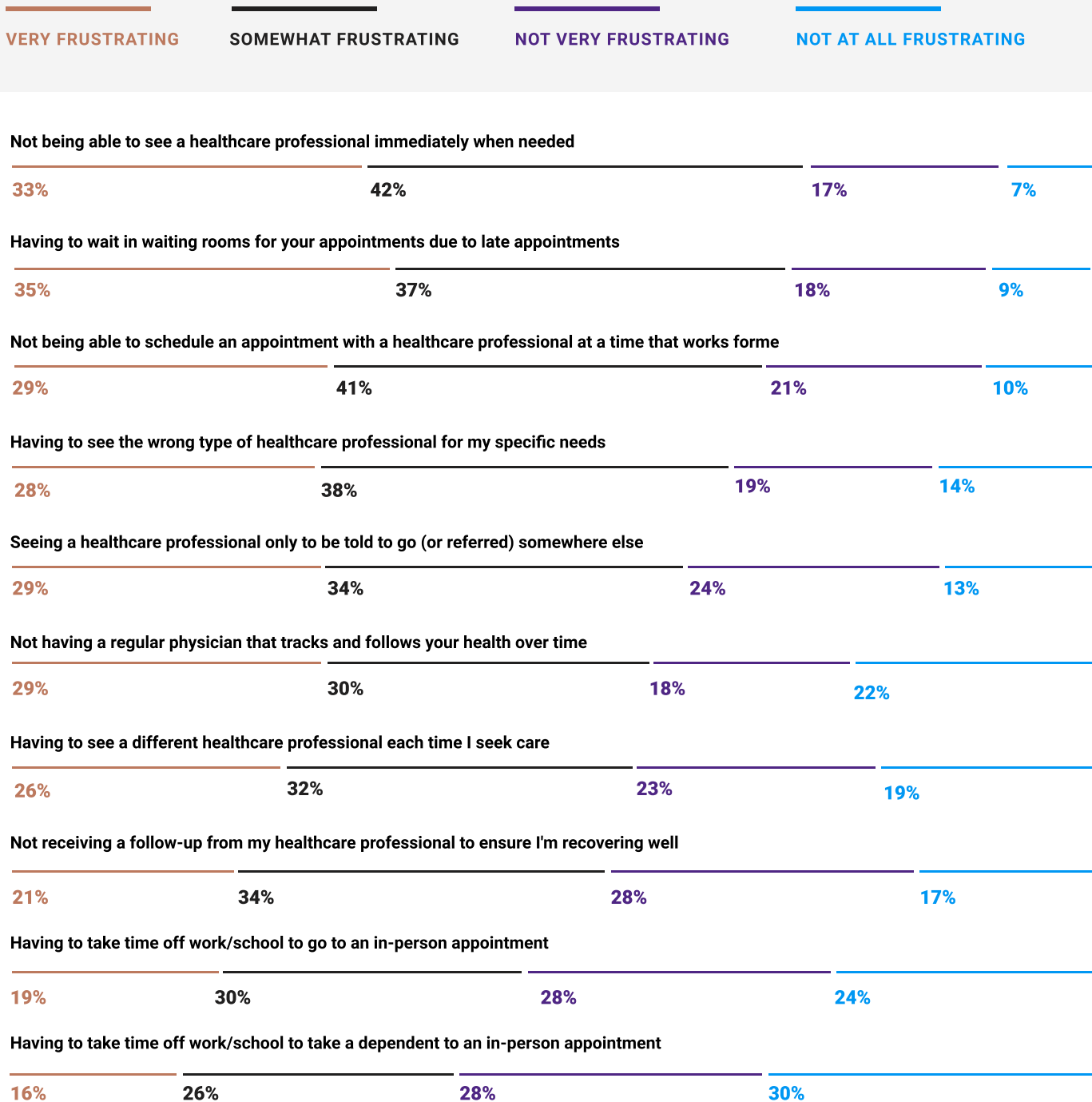
A large majority of Canadians surveyed (86%) report having a family physician. But close to half of them, 46%, indicate that it would typically take over four days for them to see a healthcare professional for a minor health concern, and close to a quarter (22%) say it would take more than a week. Such wait times can have negative health impacts (minor issues can become more serious) and can lead to lost productivity and disruptions in daily life.

In addition to wait times, Canadians experience other challenges in accessing care. Over half of those surveyed report frustrations with excessive wait times at clinics, a lack of choice in appointment times, and being directed to the wrong healthcare professional. These challenges can take time away from other activities: about one in three Canadians say that they attend four medical appointments a year, with each appointment demanding three or more hours away from work or school. Lack of follow-up care is another common frustration that may, like delays in initial consultations, cause health concerns to worsen because they have not been fully resolved.

**46% OF CANADIANS
WILL ONLY BE ABLE TO
SEE A HEALTHCARE
PROFESSIONAL AFTER
FOUR DAYS FOR MINOR
HEALTH CONCERNS**



ACCESS, WAITING, SCHEDULING, NAVIGATION AND LACK OF FOLLOW-UP CARE ALL CONTRIBUTE TO FRUSTRATION WITH CANADIAN HEALTHCARE



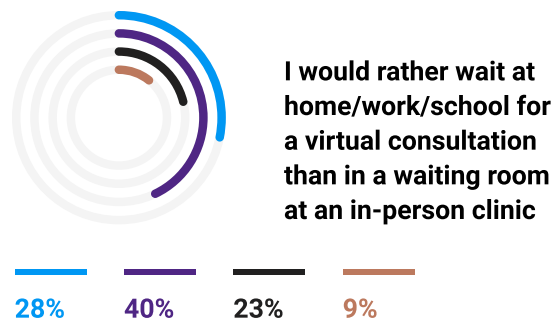
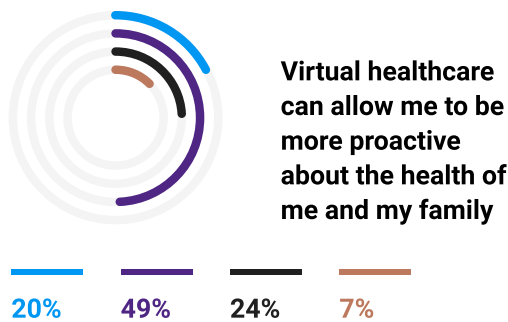
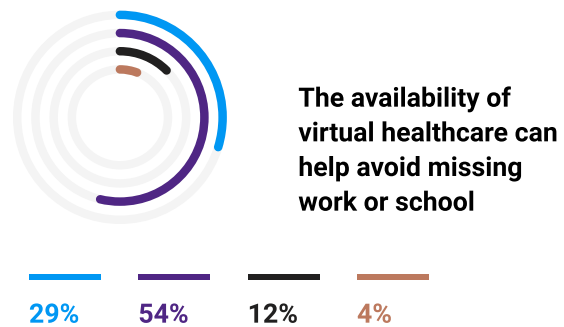
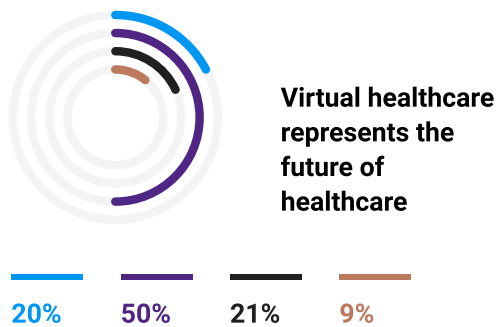
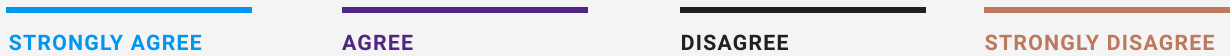
The pandemic has only added to the strains on the healthcare system and the challenges many Canadians have in accessing it: 46% report that COVID-19 has made it more difficult to access healthcare. These added pandemic-driven challenges increase the chances that some conditions will not be addressed in a timely way, with potential negative consequences for the health system and for Canadians.

1 IN 2 CANADIANS INDICATE THAT COVID-19 HAS MADE IT MORE DIFFICULT TO ACCESS HEALTHCARE

FUTURE OF HEALTHCARE

How should Canada move forward? How can leaders manage costs, show commitment to corporate wellness and reduce barriers to access, especially given the growing share of older adults in the population? Most Canadians (70%) agree that “virtual healthcare represents the future of healthcare”. Most also agree that access to virtual healthcare can help Canadians reduce the number of hours they spend away from work or school, allow them be more proactive about their health, and can provide a way to access care from the comfort and safety of their own space.

70% **AGREE THAT “VIRTUAL HEALTHCARE REPRESENTS THE FUTURE OF HEALTHCARE”**



OVER HALF OF CANADIANS ASSOCIATE THE FOLLOWING ADVANTAGES WITH VIRTUAL HEALTHCARE:



**No travel
necessary**



**Does not
expose you to
other sick
people**



**Can do from
anywhere**



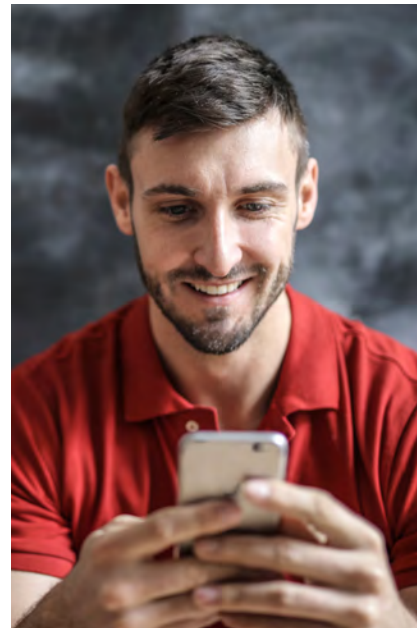
**Reduced
wait times**

Some of these advantages address the very access issues that Canadians name as frustrations. Moreover, it is worth noting that Canadians cite these perceived advantages of virtual healthcare regardless of whether they have direct experience of such care. There is reason to believe that the more familiar people become with telemedicine and virtual healthcare, the more persuaded they are of its benefits.

Even with limited experience, approximately three in four Canadians recognize that dedicated virtual healthcare platforms are safer and more secure than multi-purpose communication platforms such as Skype or Zoom, and that advanced technologies like artificial intelligence, trained using big data, can help reduce human bias during the diagnosis process.

Canadians' belief that virtual healthcare is the future of healthcare, combined with the advantages they associate with virtual healthcare, suggests that the public are comfortable with the technologies associated with telemedicine and that technology would not be a major barrier to adoption.

A common concern with virtual healthcare is privacy. About half of Canadians say privacy is their biggest concern when it comes to accessing healthcare through a virtual platform. However, in a survey of Canadians who have used Dialogue's services found that those who had experience with Dialogue's virtual healthcare platform had fewer privacy concerns. As Canadians gain experience with authorized telemedicine platforms like Dialogue, we expect that worries around privacy will be eased.



WHAT PEOPLE WANT FROM TELEMEDICINE

Creating positive perceptions and experiences of telemedicine is critical to expanded use. A vital first step is ensuring that virtual platforms incorporate the services and access options that are most important to Canadians.

To measure what matters to Canadians, we created a set of possible attributes for a hypothetical virtual healthcare platform. We created various combinations of these attributes to help users imagine a range of “products”, and then asked respondents which product they would choose based on its attributes. This exercise revealed that when choosing a potential virtual healthcare platform, the following five key attributes account for 76% of the decision-making process. A virtual healthcare platform that performs well on these five attributes is much more likely to be adopted than one that does not.

TOP 5 ATTRIBUTES CANADIANS SEEK FROM A VIRTUAL CARE PLATFORM



Accessibility, as defined by availability through work, school association or financial institution benefits



How appointment is conducted, as defined by giving the choice to user (phone, video, text, chat, etc.).



Follow-ups



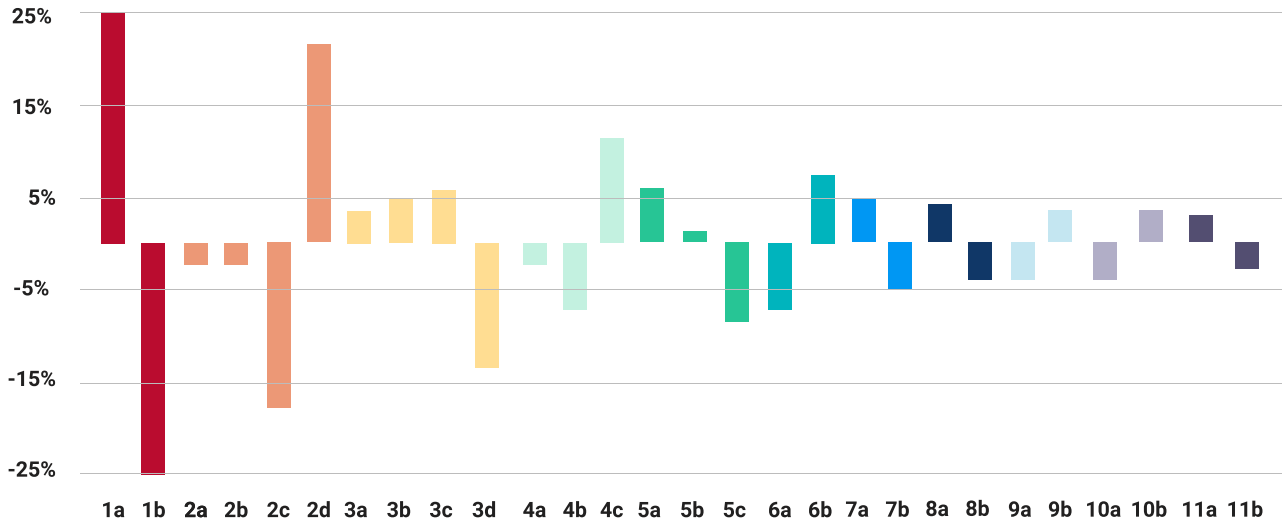
Appointment timing, as defined by scheduling based on user availability



Mental health support

The graphic below offers more detail on the results of the exercise described on the previous page, showing the scale of each feature’s influence on adoption – positive or negative. For example, offering consultations only by phone would have a moderate negative effect on users’ likelihood of using a given virtual healthcare platform. By contrast, letting users choose any mode of communication (phone, video, chat, text, etc.) would have a substantial positive effect on adoption.

ATTRIBUTES IMPACTING CHOICE OF VIRTUAL HEALTHCARE PLATFORM



Accessibility

- 1a** Available through your work, school association, or financial institution benefits
- 1b** Service you have to pay for out-of-pocket

How appointment is conducted

- 2a** Via video only
- 2b** Via phone only
- 2c** Through text messaging or chat only
- 2d** Allows you to choose the mode of communication (phone, video, text, chat, etc.)

Mental health support

- 3a** Offers mental health support through a general practitioner only
- 3b** Offers mental health support through a mental health specialist or social worker

Mental health support

- 3c** Offers mental health support through a psychologist or psychiatrist
- 3d** Does not offer mental health support

Appointment timing

- 4a** Appointment booked for a later time or date - based around practitioner availability
- 4b** Appointment begins immediately - no ability to book for a later time or date
- 4c** Appointment booked for a later time or date - based around your schedule and availability

Follow-up

- 5a** The same healthcare professional follows up with you after your appointment to ensure treatment success
- 5b** A different healthcare professional follows up with you after your appointment to ensure treatment success

Follow-up

- 5c** There is no post-appointment follow-up by a healthcare professional to ensure treatment success

History

- 6a** Requests your medical history before every appointment
- 6b** Keeps a record of your medical history that healthcare professionals can access before your appointment

Team

- 7a** From a team of healthcare professionals who take dedicated shifts on the platform to provide focused patient consultations
- 7b** From HCPs that “moonlight” during their lunch break, coffee break, or other pockets of available time during their day or night

Navigation

- 8a** Takes care of booking referral and testing appointments for you
- 8b** Gives you a list of places for referrals or testing for you to contact and book

Triage

- 9a** Asks close-ended questions about my health to help narrow down diagnosis and secure appointment with the right HCP
- 9b** Asks open-ended questions about your health that you have to type answers to before seeing a healthcare professional

Scope of Diagnosis

- 10a** Can assess, provide a plan, and store health information securely for most of your health concerns through a single app or platform
- 10b** Can assess, provide a plan, store health info securely for only a few health concerns and direct you elsewhere for other issues

Choice of healthcare professional (HCP)

- 11a** Platform chooses the right healthcare professional for your specific health concern
- 11b** Platform books you with any healthcare professional or a generalist only

Accessibility, through benefit plans, is among Canadians' most important considerations when they contemplate using a virtual healthcare platform. Eight in ten say they would not be willing to pay out of pocket for virtual healthcare – an unsurprising finding, given the universal access provided by the public healthcare system. However, the majority (82%) of working Canadians agree that “employers should provide virtual healthcare options for their employees”, and 66% say they would be likely to use virtual healthcare if it was available through their benefit plan.

82%

OF WORKING CANADIANS AGREE THAT EMPLOYERS SHOULD PROVIDE VIRTUAL HEALTHCARE FOR EMPLOYEES

When Canadians contemplate what they would want from virtual healthcare offered through their benefit plans, their expectations are significant – meaning that employers' choice of telemedicine providers is likely critical to adoption. Almost all Canadians indicate that talking to the right healthcare professional is important, suggesting that a platform that offers a multidisciplinary team targeting patients' specific issues will be well received. In addition, over 3 in 4 indicate that not feeling rushed, having access across Canada, having help navigating the system and 24/7 access are all important features.

CANADIANS HAVE HIGH EXPECTATIONS FROM A VIRTUAL HEALTHCARE PLATFORM, STARTING WITH TALKING TO THE RIGHT HEALTHCARE PROFESSIONAL

VERY IMPORTANT

IMPORTANT

NOT VERY IMPORTANT

NOT AT ALL IMPORTANT

Talking to the right healthcare professional for my specific issue



Not feeling rushed during my appointment with the healthcare professional



Ability to easily access a healthcare professional no matter where in Canada I am when the need arises



Ability to access healthcare in the language of my preference



Having a healthcare professional assist with booking a specialist or referral appointment (instead of doing it myself)



Ability to easily access a healthcare professional 24 hours a day, 7 days a week, 365 days a year



Having a healthcare professional follow-up after my appointment to ensure I'm recovering well



IMPLICATIONS FOR EMPLOYERS AND ORGANIZATIONS

Employers in Canada recognize that the health and safety of their workers is paramount to a productive and successful work environment. Since the start of the COVID-19 pandemic, employers across Canada have acted to protect the health of their employees, with many supporting remote work, and others adopting procedures and protocols to keep their employees safe when their roles require them to be in a shared workplace.

But making sure employees' working conditions are safe is only one part of supporting a team's health. To ensure that employees remain productive, leading employers prioritize corporate wellness and take proactive steps to support their teams' overall physical and mental health, in part by ensuring employees and their families have access to the support they need.

Our research identifies opportunities for many Canadians to access healthcare using virtual platforms, potentially reducing the burden on in-person care providers and increasing safety and satisfaction. This study has also shown that while Canadians enjoy universal access to healthcare, in practice those seeking care sometimes encounter barriers, frustrations and lost hours.

Virtual healthcare is a solution, it provides an approach to easily access healthcare when needed; allowing Canadians to take control of their own health and wellbeing and that of their families. Not only does virtual healthcare benefit employees, it also benefits employers as they strive to keep their employees healthy and productive. Canadians would like to see their employers provide more options for telemedicine as part of their benefit plans. They report that if such an offering were available to them – and included the right features – they would be likely to use it.

Taken together, these findings suggest that for employers seeking to promote corporate wellness, build healthy, productive teams and competitive benefits packages, virtual healthcare may be an important part of the answer – sooner rather than later.



ABOUT ENVIRONICS RESEARCH

Environics Research delivers evidence-based solutions to clients working in a range of sectors and industries. Our team is drawn from many disciplines – from business and marketing to sociology and urban affairs. This mix makes Environics a creative and intellectually vibrant research and consulting firm, where methodological rigour and unrivaled analytical capabilities come together. Our experience, our people and our sophisticated tool kit help our clients get answers to their most important questions.

Today, Environics' international clients include a number of the world's largest consumer marketers. In Canada, most of the country's governments, many leading non-profit entities, and businesses working in a range of industries (including financial services, telecommunications, natural resources, print and broadcast media, healthcare and pharmaceuticals, and packaged goods) trust Environics to develop actionable insights that inform evidence-based decision-making.

Environics has an extensive record of conducting health-related research, and of delivering evidence and insight to inform public health strategies and health policies at provincial and federal levels.

Headquartered in Toronto, we employ more than 50 staff across Toronto, Montreal, Ottawa, Vancouver, Calgary and San Francisco.

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ABOUT DIALOGUE

Dialogue is a pioneering telemedicine company, dedicated exclusively to the world's leading organizations. We elevate expectations and experiences through standard-setting healthcare practice, security, and utilization.

Our innovative, in-house technology improves the efficiency of the consultation to allow for more meaningful time with our expert, multi-disciplinary team. We call this: Humanized Healthcare™. Thanks to the largest and most experienced team of healthcare professionals in Canada, we offer true continuity of care as patients can talk to the same healthcare professional. Follow-ups help ensure our members are on the mend and have taken the next steps required. We help connect with local specialists or resources, as well as a broad range of services. Our results-based approach ensures long-lasting health outcomes for organizations and their members.

We are proud to deliver much needed care to millions of Canadians through thousands of organizations.

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