PUBLIC PERSPECTIVES

Canadians and Digital Health

July 2017

GENERAL THEMES FROM THE DATA ARE…

Majority of Canadians are now online health seekers

The proportion of Canadians that has gone online for health-related information continues to increase: three-quarters have done so in the past month. And many of these people are bringing this information in to discuss with their health care providers. Health care professionals (HCPs) confirm this, with one-third saying that more than half of their patients have brought up information they found online during visits.

Many Canadians say they are ready to pay for e-consultations services .

The appetite for virtual doctor visits is significant with six in 10 Canadians saying they are comfortable with the idea of e-consultations or e-visits for routine medical issues such as consultations, review of test results, or chronic disease management. A similar proportion of HCPs are ready to meet this need and provide the service in the coming years.

Almost half of the population has tried a connected health device or app.

Digital health tools have penetrated a sizeable proportion of the market: one-third of Canadians have used a smartphone health app such as fitness tracking, nutrition and weight loss; one-quarter have used wearable trackers such as Fitbit or TICKR; and, 2 in 10 have used devices with connectivity such as a sleep tracker or heart rate monitor to help patients adhere to and manage their treatments. And, HCPs are recommending these to their patients as well – 58% have recommended at least one of these devices to their patients.

One-third of Canadians receptive to being micro-chipped.

What might come as surprise is that Canadians say they would seriously consider having a micro-chip implanted under their skin that would contain their health information. While this is a bit higher among Millennials (41%), it is not that much lower among Gen Xers (27%) and Boomers (32%).

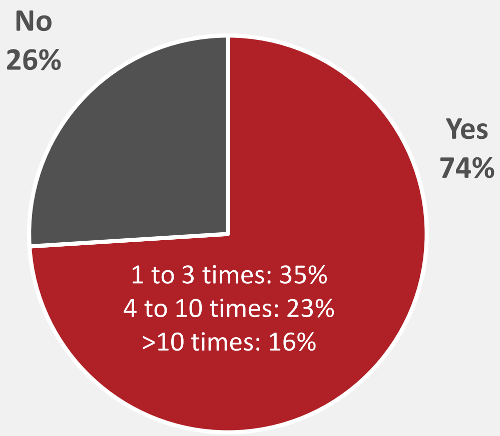
This in itself sums up how far Canadians have come in accepting digital solutions for health.

Highlights from the Canadians and Digital Health Survey

Online has become a go-to source for health-related information among Canadians and health care professionals (HCPs).

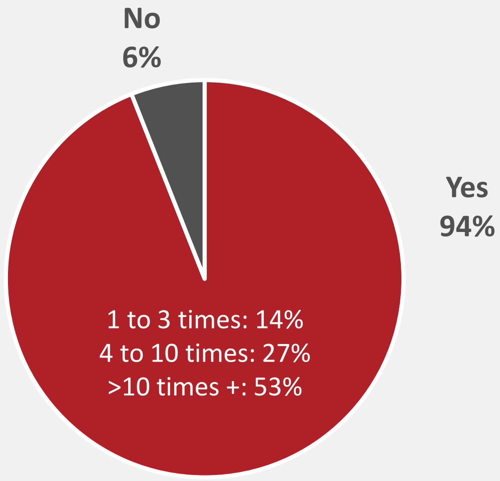
General population

% went online to research about health-related topics in past month



Health care professionals

% went online to provide information health-related for people, in general or for your patients



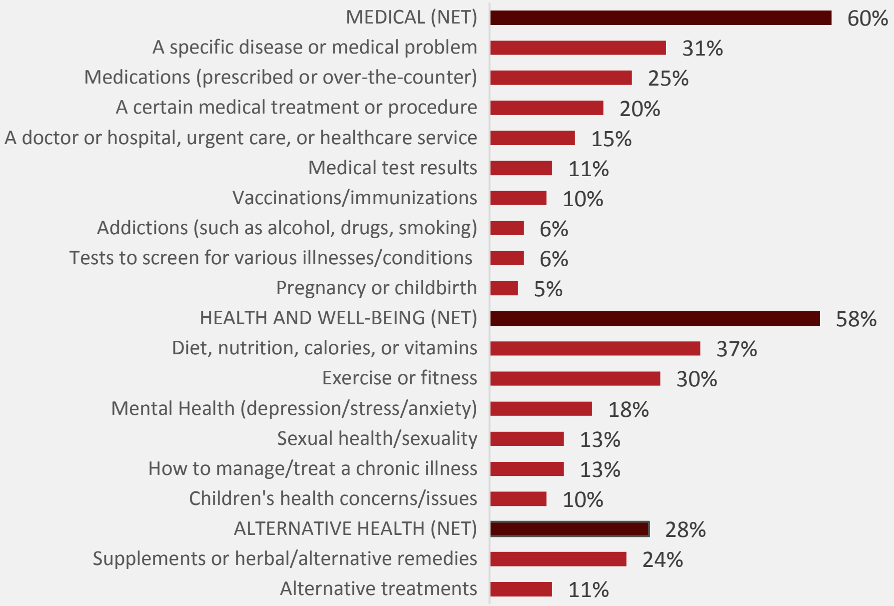
Gen pop Q1.How many times in the past month did you go to online sources/sites, including social media, to research, follow or discuss anything about health (including nutrition, fitness or medical information) for you or your family/friend? Base: Total general population, n=1,003.

HCPs Q1. How many times over the last month did you go to online sources/sites to provide information related to health, fitness or medical information for people, in general, or for your patients? Base: Total HCPs, n=989.

Canadians are seeking a wide range of health information online; HCPs say the public is discussing what they find at visits.

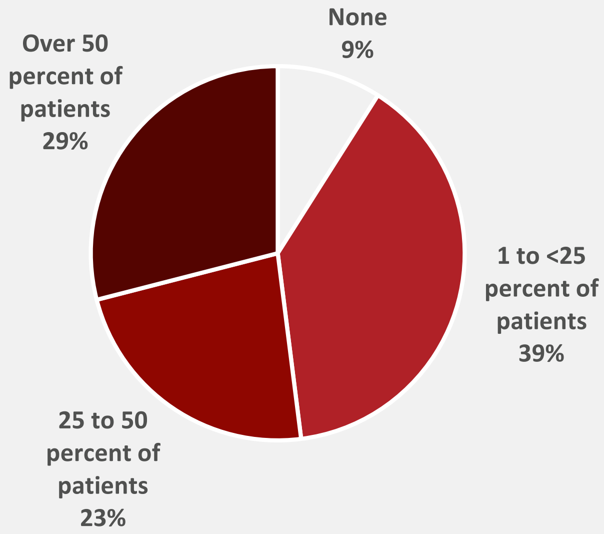
General population

Types of health-related information people seek online



Health care professionals

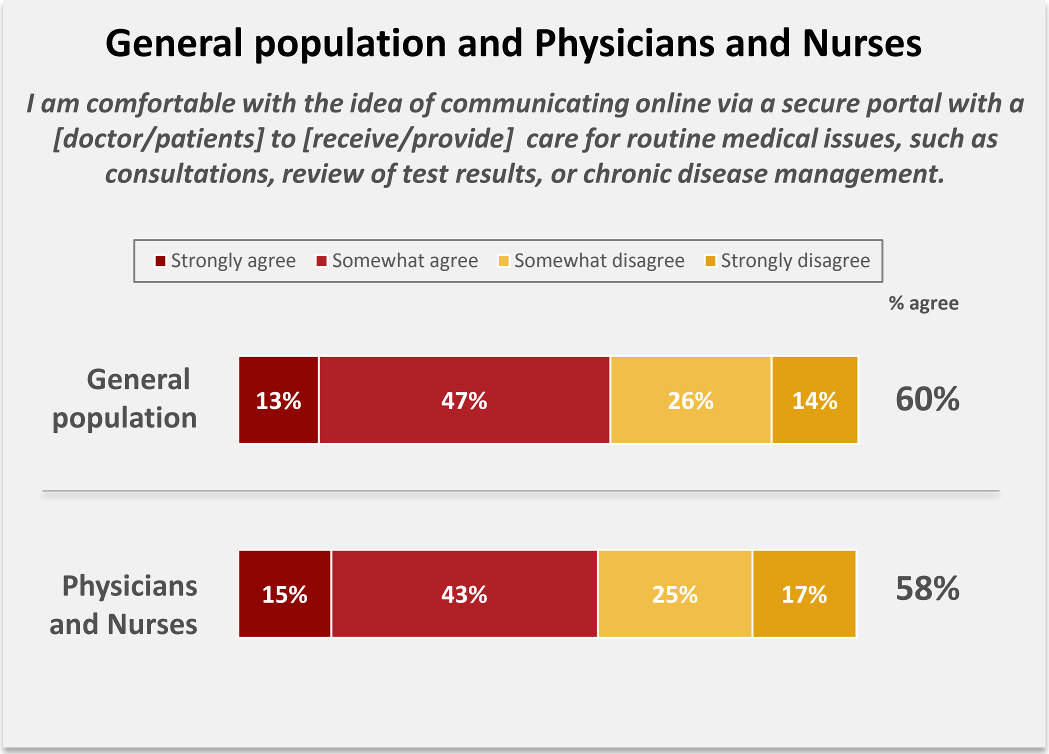
Proportion of patients, within an HCP's practice, who discuss health-related information found online during appointments



Gen pop Q2. Now, thinking about the past year, have you gone to online sources/sites, including social media, to look for information on any of the following health-related or medical topics for yourself or your family? Base: Total general population, n=1,003.

HCPs Q2. Approximately what proportion of your patients would you say raise, bring or discuss health-related information that they found online when they have appointments with you? If none, type in "0". Base: Total HCPs, n=989.

Six in 10 Canadians and HCPs comfortable with the idea of e-consultations or e-visits.

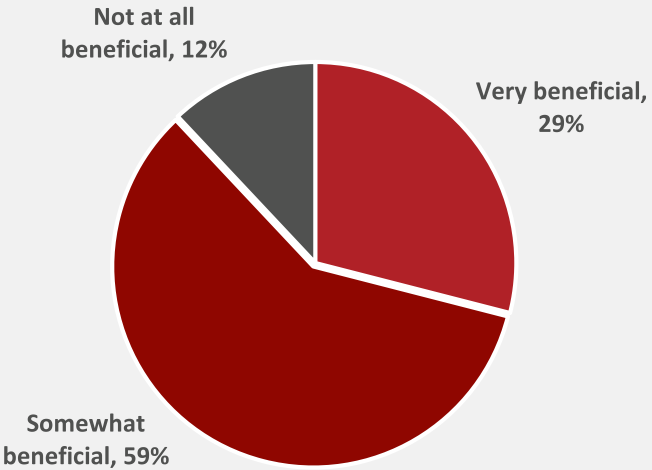


Gen Pop Q9. To what extent do you agree or disagree with each of the following? Base: Total general population, n=1,003;
HCPs Q9. To what extent do you agree or disagree with each of the following? Rebased to total of those who subscribe to AdvancingIn and mdBriefcase, n=543.

Vast majority of Canadians and health care professionals (HCPs) see the benefit of connected health devices (CHDs)/apps.

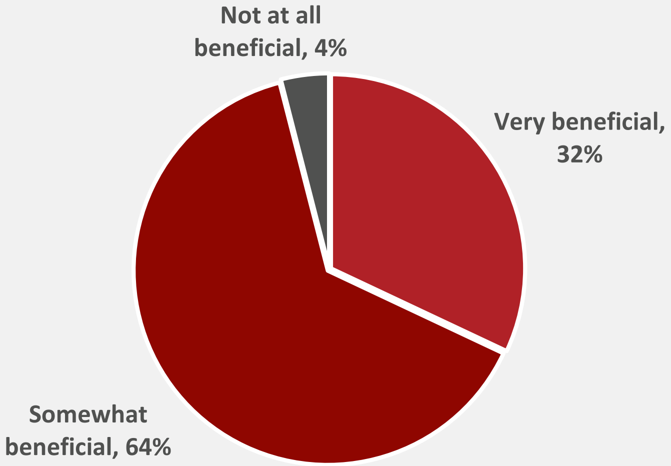
General population

See CHDs/mobile health apps as beneficial for people trying to improve their health



Health care professionals

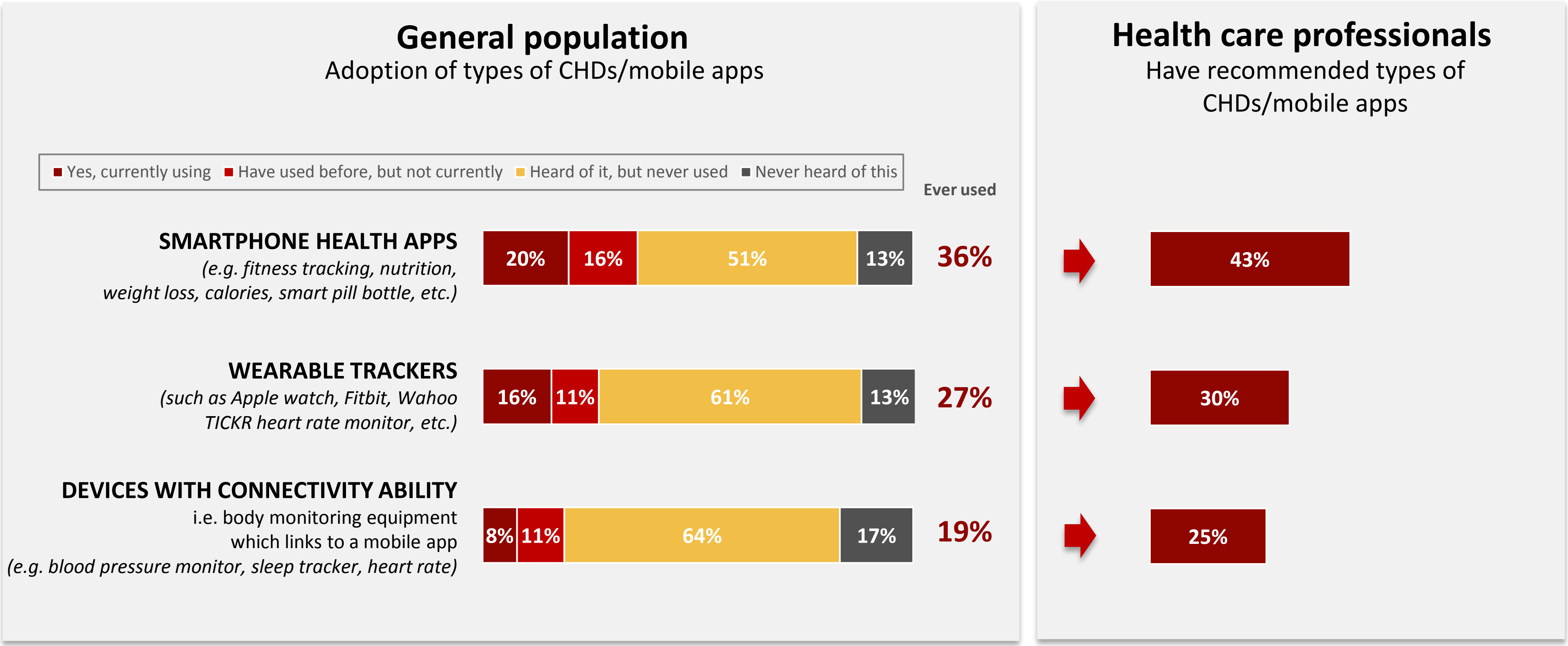
See CHDs/mobile health apps as beneficial for people trying to improve their health



Gen Pop Q7. How beneficial do you think connected health devices or tools, or mobile apps, are for people trying to improve their health? Base: Total general population, n=1,003.

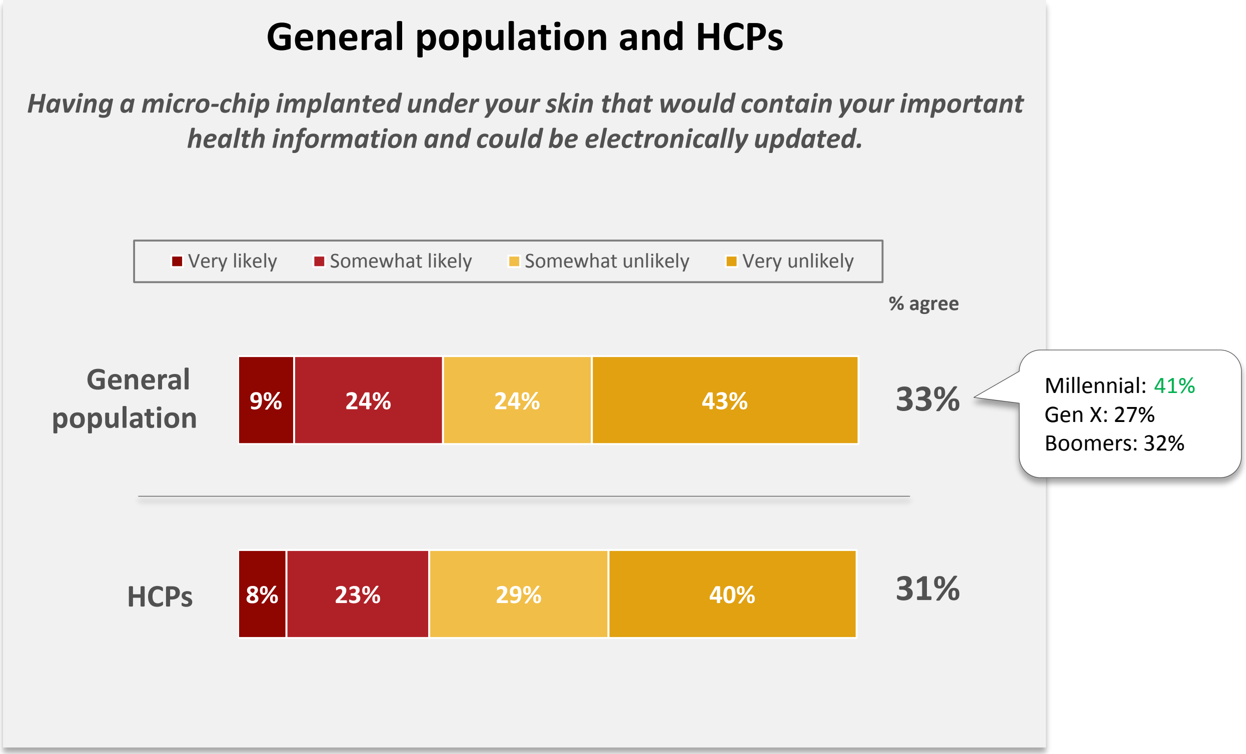
HCPs Q7: How beneficial do you think connected health devices or tools, or mobile apps, are for people trying to improve their health? Base: Total HCPs. n=989.

Specifically, smartphone health apps show highest use among Canadians, and highest recommendation among HCPs.



Gen Pop Q4.Which of the following connected health devices or mobile apps have you used to manage your health? Base: Total general population (n=1,003).
HCPs Q3. Have you recommended any of the following connected health devices or mobile apps to your patients to manage their health? Select all that apply. Base: Total HCPs (n=989)

One-third of Canadians and HCPs receptive to going as far as having a micro-chip implanted.



Gen Pop Q11. If it were available, how likely would you be to seriously consider…Base: Total general population, n=1,003.
HCPs Q11. If it were available, how likely would you be to seriously consider… Base: Total HCPs, n=989.

Methodology

Methodology

SURVEY METHOD	SAMPLE	WEIGHTING
Ipsos conducted two surveys: one among the general public and one among health care professionals. The general population was conducted online using Ipsos' online I-say panel. The survey was in field from April 20 to 24, 2017. For the health care professionals survey, Ipsos partnered with mdBriefcase to access their database of members across Canada, including family physicians/general practitioners, pediatricians nurses and pharmacists. The survey was in field from May 4 to May 9, 2017. mdBriefcase offers free online accredited continuing medical education to Canadian physicians and healthcare professionals.	General population: a total of n=1,003* online interviews were completed among a representative sample of Canadians aged 18 and older. The credibility interval on a sample of this size is +/- 3.1 percentage points. Health care professionals: a total of n=989 completed the survey online. ** The precision of Ipsos online surveys is measured using a credibility interval. This is similar to standard confidence limits assigned to traditional phone and other surveys, but has been tailored for online surveys.*	The general public data was weighted to the most recent Statistics Canada Census data according to age, gender and region. The health care professionals data was not weighted.

CONTACTS

This report highlights findings from a larger study on digital health that includes information on the proportion of Canadians:

- **Who have subscribed to paid medical e-consultations;**
- **Who are currently using, have used but not currently, and are likely to use connected health devices or mobile apps in the near future; and,**
- **Who support financial incentives from the government for covering these digital tools.**

If you are interested in a copy of the full study or would like to understand how demographics play a role in Canadians' views and the adoption of digital health tools, please contact:

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