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THE FUTURE OF CONNECTED HEALTH CARE

REPORTING CANADIANS' PERSPECTIVE
ON THE HEALTH CARE SYSTEM

August 2019 – A CMA / Ipsos collaboration





The 2019 CMA Health Summit is exploring the notion of “connectedness” in health care. To gain further insight, the Canadian Medical Association collaborated with Ipsos to ask Canadians how they feel about technology such as virtual care and artificial intelligence as well as online patient platforms. Questions about increasing accessibility, control of medical records, trust and privacy, and finally humanity of health care in a connected world were explored.



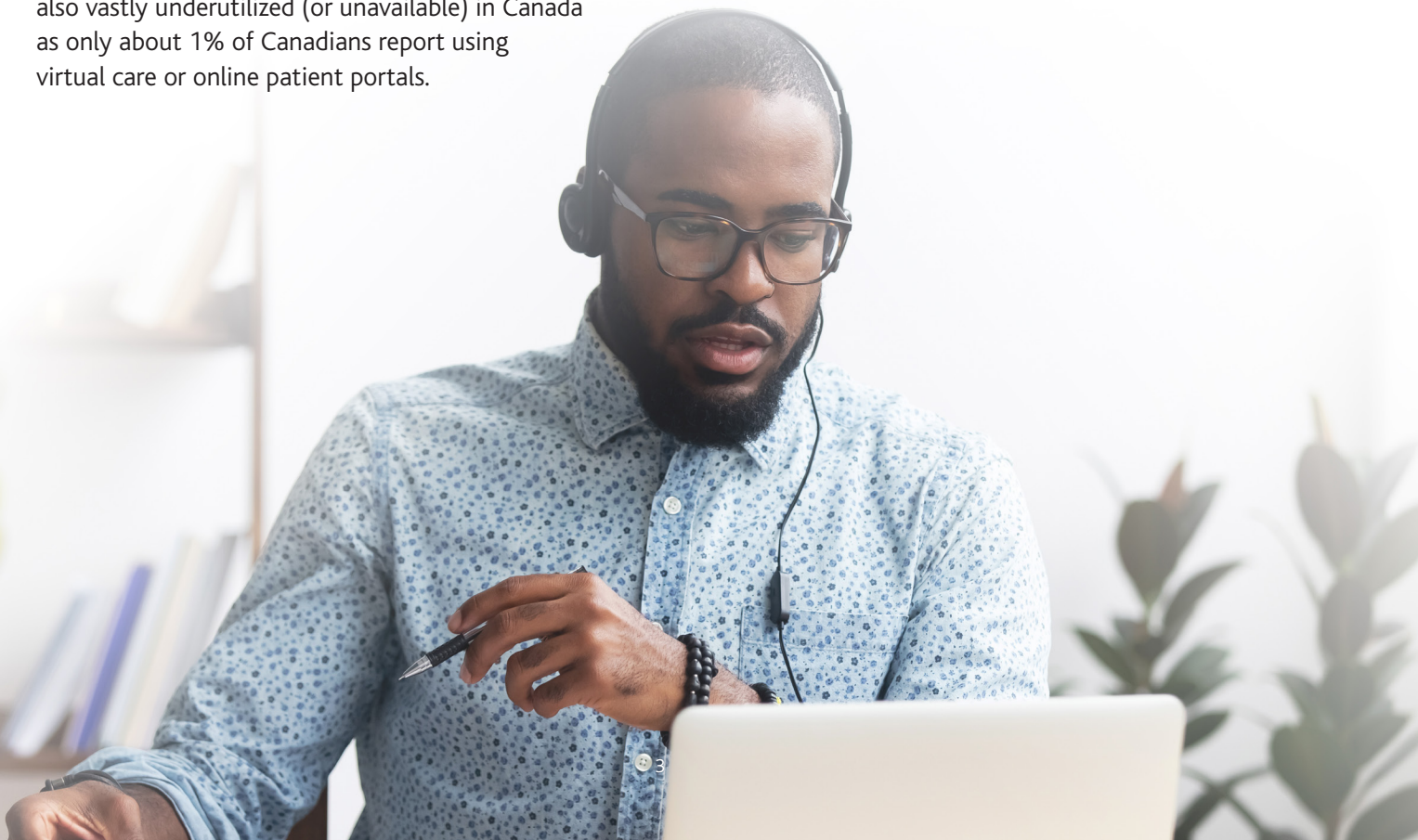
The wide spread introduction of high-speed Internet has resulted in Canadians living increasingly more connected online lives. Nearly three-quarters of Canadians spend at least 3-4 hours online per day, with more than 1 in 10 spending over 8 hours online per day, according to the 2019 Canada's Internet Factbook by the Canadian Internet Registration Authority (CIRA). Canadians are also accessing the internet through mobile devices more than ever before, and it is boomers (55+) who have seen the largest growth in surfing the web with a mobile device, climbing from just 24% in 2015 to 57% in 2019.

What access to the internet has done is allow Canadians to be more connected - whether it's connections to friends and family through social media, to their financial transactions through online banking, to the world through online news, to commerce through on-line shopping, or to their governments through an increasing array of digital services - Canadians are connecting to what is important in their day to day lives.

88% of Canadians reported using online banking last year, and more than half (53%) say it is their most common banking method (Canadian Bankers Association).

Nearly 80% of Canadians 18+ report using free versions of purchasing digital products, such as music and video streaming services, e-books, online games, apps and computer software from July 2017 to June 2018. Over the same period, **28% of Canadians 18+** report making money through online platforms (Statistics Canada).

One important area in Canada that has yet to fully embrace online connectedness is health care. Resembling a puzzle with missing pieces where you can't make out what the picture is, the Canadian health care system has many different disconnected pieces of information, making it difficult to see the full picture of someone's health. Use of more digital approaches to health care are also vastly underutilized (or unavailable) in Canada as only about 1% of Canadians report using virtual care or online patient portals.



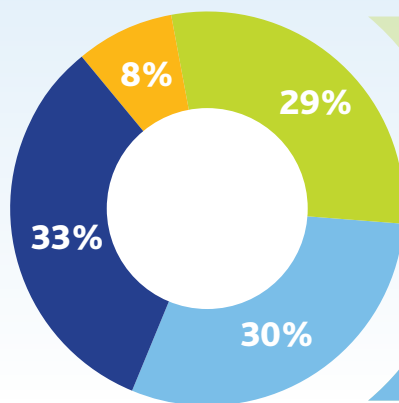


Health care in the next 10 years

Canadians are divided on whether they feel their health system will improve, worsen, or stay the same in the next 10 years.

Direction of the health care system

Canadians are divided on whether the health system will improve or worsen in the next 10 years, with nearly equal proportions believing it will improve, worsen or stay the same. The main reason to think the health system will improve is advancing technology/innovation.

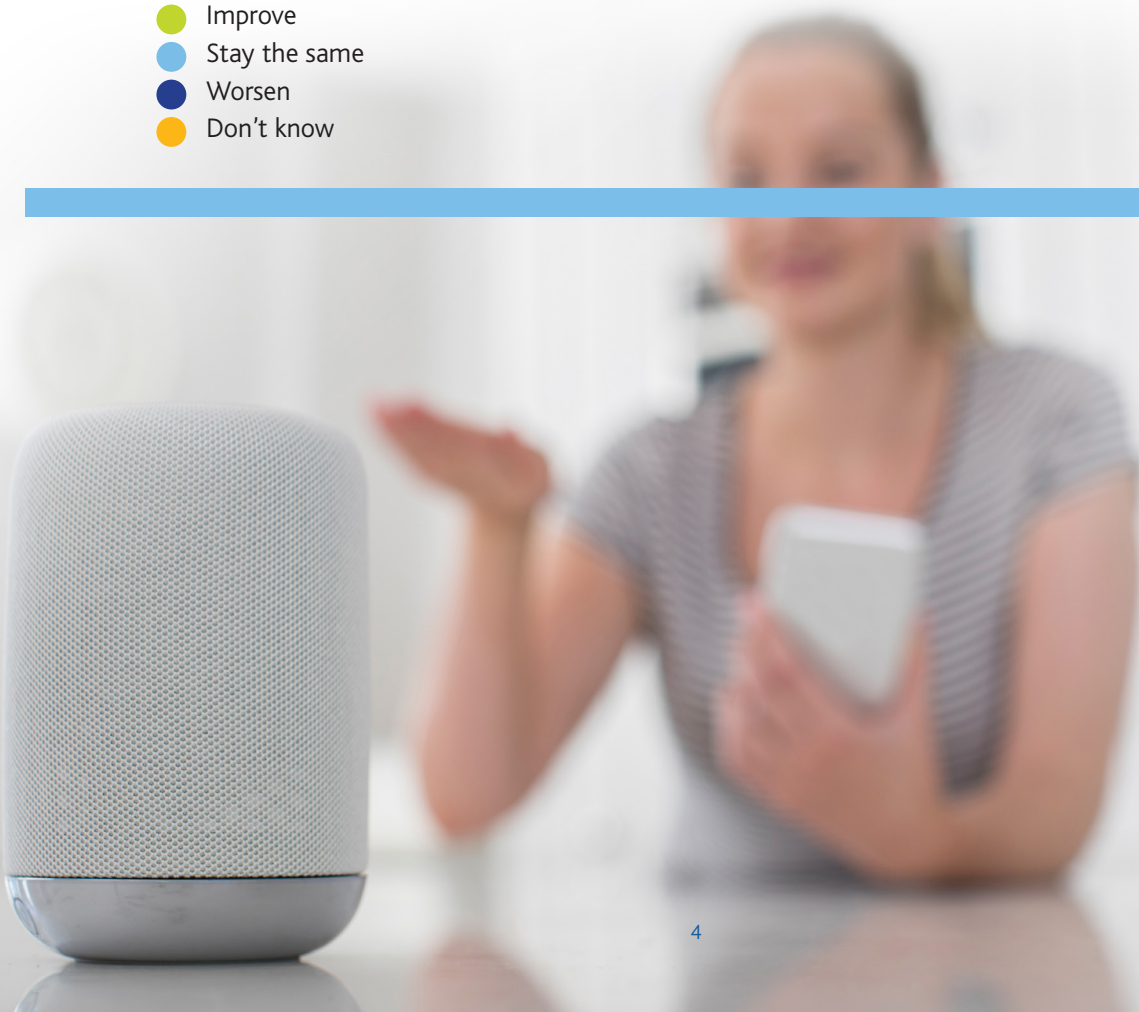


- Improve
- Stay the same
- Worsen
- Don't know

Among those who believe the health system will improve in the next 10 years, the **top reason why is advancing technology/innovation** (28%), which is well ahead of next highest mention more funding/support/policies/attention/efforts from the government (16%)

"Better technology and innovations will make things easier. More doctors should be available."

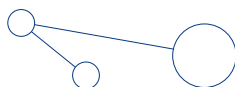
"Technology will be integrated into it especially people being able to talk to doctors on the internet."



In fact, most Canadians are already reporting a positive impact of technology in health care, whether it is improving the flow of information between them and their physician (68%) or improving their health care experience (63%).



The anticipation that technology will lead to even greater improvements in the health care system should not come as a surprise as Canadians have experienced rapid growth of new technologies across all aspects of their lives over the last decade and a half.



Canadians predictions on the future health care

When it comes to their health, Canadians anticipate being even more connected in the next 10 years, and a majority believing these will make their lives better. In the next 10 years, Canadians think it is likely...

	% Likely	% Make Life Better
They'll be able to track their upcoming specialist appointment through a system that will show where they are in the queue	79%	79%
They'll be able to have access to and contribute to their complete medical history and be able to share it with their doctor anytime	77%	83%
They'll be able to see their health professional virtually through a digital platform	71%	65%
Everything about their health – from blood work to medication to fitness to sleeping patterns – will be monitored through a centralized platform	62%	69%
The data from my Fitbit/wearable device will be connected with my medical/hospital data	60%	66%

The role of AI in health care

Canadians also recognize the role Artificial Intelligence (AI) will play in the future of health care. Nearly 6 in 10 think it is likely that in the next 10 years AI programs or robots will be able to provide real health care services, such as robot assisted surgery, early diagnosis, etc. and over half think it is likely that AI programs will be able to accurately diagnosis various diseases and conditions. Seven in 10 Canadians believe medical appointments are likely to be booked through an AI system in the next 10 years. Over two-thirds believe these advancements in AI technology will have a positive impact on their lives.

Health changes in next 10 years and impact

Seven in 10 Canadians believe medical appointments are likely to be booked through an AI system in the next 10 years, and over half believe it is likely AI will be able to deliver real health services, and accurately diagnosis various diseases/conditions – with the majority believing these will have a positive impact.

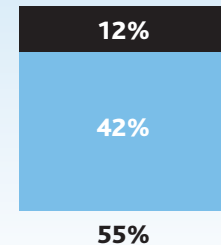
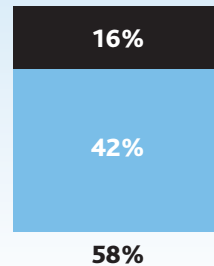
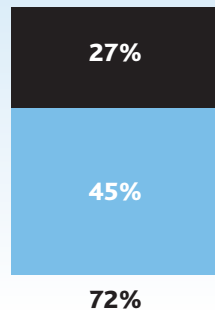
Medical appointments will be booked through a robot/Artificial Intelligence.

Artificial Intelligence (AI) programs or robots will be able to provide real health care services, such as robot assisted surgery, early diagnosis, etc.

Artificial Intelligence (AI) programs or robots will be able to accurately diagnosis various diseases and conditions.

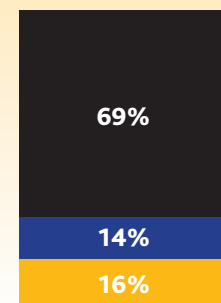
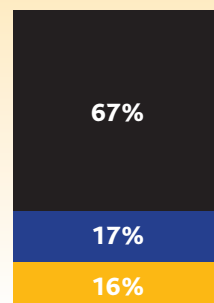
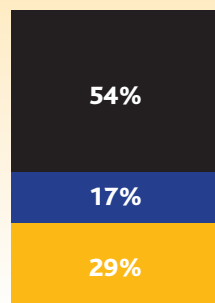
Likely to happen in next 10 years...

- Very likely
- Somewhat likely
- % Likely



Impact on life

- Better
- Worse
- No impact





The future of virtual care

Canadians are ready for a more connected approach to health care. A majority of Canadians are interested in virtual care, with many believing this to be a step in the right direction for the health care system that will lead to improved access, more timely care and better health care overall. While there is much optimism, Canadians remain concerned about losing the human connection of health care (77%), putting their privacy at risk (75%) or opening the door to private health care (71%).

Virtual care – optimism and concern

While many Canadians believe virtual care will lead to improved access, more timely care, greater convenience and better care overall, there is sizeable concern related to a loss of human connection, privacy risks, and opening the door to private health care.

% Strongly/somewhat agree

Virtual care will improve access to health care services

73%

Virtual care will lead to more timely care

71%

Virtual care is more convenient than visiting in person

67%

Virtual care will lead to better overall health care

63%

The human connection and compassion are lost with virtual platforms

77%

Personal privacy is at risk with virtual visits

75%

Virtual care opens the door to private health care in Canada

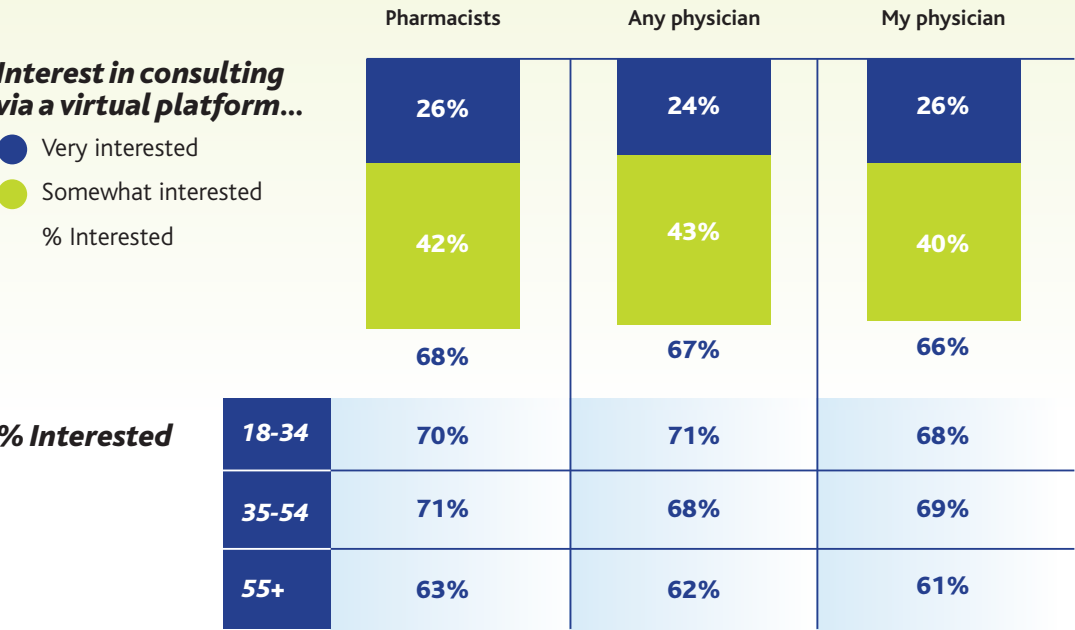
71%



The generation gap is decreasing. While younger Canadians express higher interest, a majority of boomers are also interested in virtual care.

Interest in virtual care

Roughly two-thirds of Canadians are interested in consulting with various health care providers through a virtual platform. While younger Canadians show greater interest, 6 in 10 of those 55+ are interested.

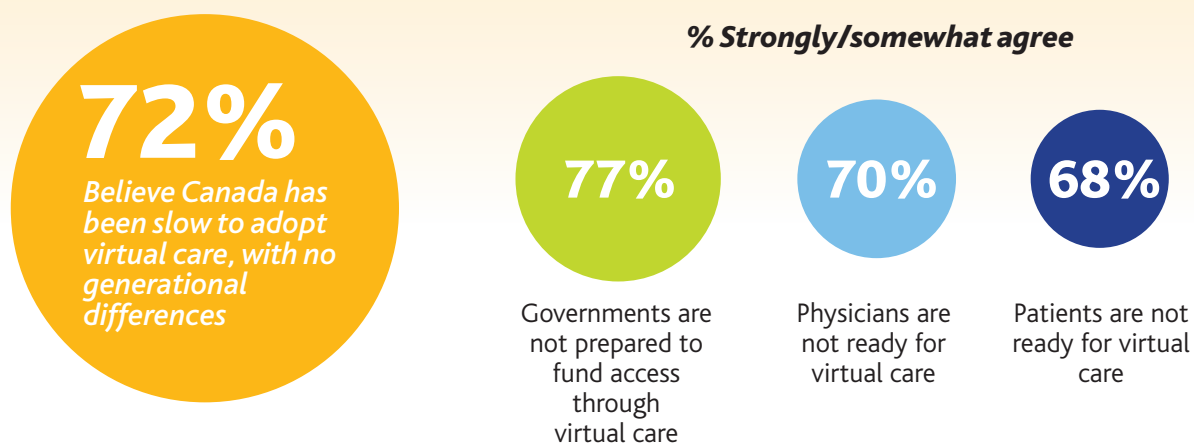




The interest in virtual care is there, however a majority of Canadians believe the country has been slow to adopt virtual care and 8 in 10 think governments are not prepared to fund access through virtual care.

Is Canada ready for virtual care?

Seven in 10 believe Canada has been slow to adopt virtual care, with nearly 8 in 10 believing government is not prepared to fund access through virtual care. There is also a sense that both physicians and patients are not ready for virtual care.



However, there is a belief that it is not just governments slowing adoption, as many believe both physicians and patients are not ready for virtual care. This slow adoption is reflected in the very low number of Canadians utilizing virtual care mentioned earlier.

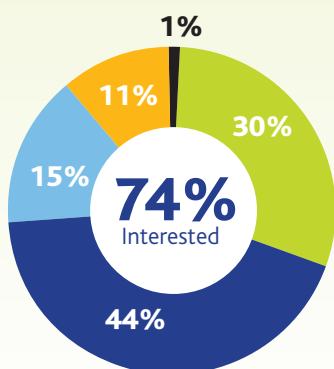


The demand for connected patient portals

A patient portal is a secure online website that gives users 24-hour access to their personal health information and connects them to their family doctor/health team. Users may also be able to book appointments and have secure conversations with their doctors online.

Interest in patient portals

Three-quarters of Canadians are interested in using patient portals, with 3 in 10 being very interested.



While younger Canadians show greater interest in patient portals (**79%** 18-34, **75%** 35-54), 7 in 10 (**68%**) of those 55+ are interested.

- Very interested
- Somewhat interested
- Not very interested
- Not at all interested
- I already use a patient portal

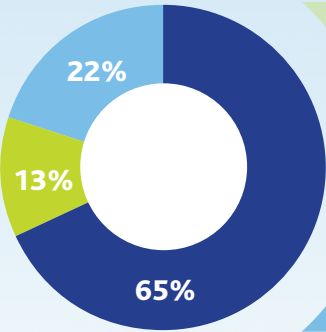
Four in 10 Canadians would subscribe to a paid virtual service offered by a private company like Google or Apple that offered 24-7 access to **their family physician or a group of health professionals they had experience with**. Over half of those 18-34 say they would subscribe to such a service (55% vs. 45% 35-54, 31% 55+).

A third say they'd subscribe to such a service if it offered access to **a range of licensed health professionals and continuous monitoring of their health through a wearable device**. Again, younger Canadians are the most likely to say they'd subscribe, with half saying they would (49% 18-34 vs. 34% 35-54, 25% 55+).

While Canadians seem to be anxiously waiting for the benefits of virtual care to come, they are also ready to jump into the world of connected patient portals and it seems to matter little whether these are offered by our public health system, or private companies like Google or Apple.

Direction of patient portals for health system

Two-thirds of Canadians believe patient portals are a step in the right direction for the health system, with improved/easier access and faster/reduced wait times cited as the main systems why.



The main reasons for believing patient portals are a step in the right direction for the health system are that it will lead to:

- Improved/easier access to services/care/information/records (44%)
- Faster/ reduced wait times/ quicker treatment/care/diagnosis (23%)

"Will improve time management, making care more efficient and therefore more cost effective"

"The huge increase in accessibility and timely medical advice on a standardized platform"

● Step in the right direction ● Don't know ● Step in the wrong direction

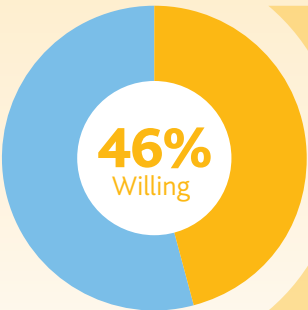
While younger Canadians are more likely to think patient portals are a step in the right direction (70% 18-34, 67% 35-54), 6 in 10 (60%) of those 55+ believe they are as well.



Close to half of Canadians are also willing to both input their health data into a program like Google, Alexa or Siri to share it with their health care provider and to allow such technology to track and monitor their health. Willingness jumps to nearly 6 in 10 among those under 35.

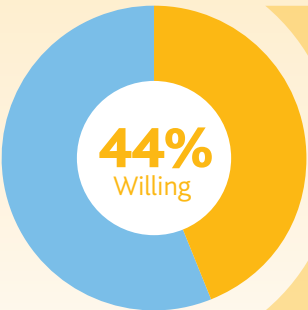
Willingness to use a private health service

Over 4 in 10 Canadians are willing to both input health data into a platform like Google and to allow it track and monitor their health. This is largely driven by those under 35.



Input my health data into a program like Google, Alexa, Siri, Fitbit, etc., that would be shared with my health and report any issues

18-34: 58%
35-54: 48%
55+: 36%



Allow a program like Google, Alexa, Siri, Fitbit, etc., to **track and monitor your health** and report any issues to your health care provider

18-34: 57%
35-54: 46%
55+: 33%

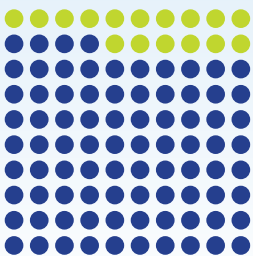




Eight in 10 Canadians are interested in the ability to access all of their health information from one platform and 7 in 10 believe having all their information on one electronic platform will reduce the chance of medical errors.

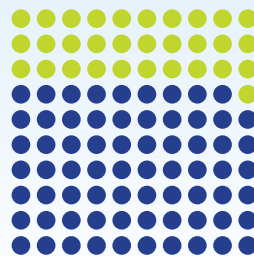
Interest in online health platforms

Eight in 10 Canadians are interested in the ability to access all of their health information from one platform and 7 in 10 believe having all their information on one electronic platform will reduce the chance of medical errors.



84%

Are interested in the ability to access all of their health information from one platform, including 4 in 10 who are **very interested**, with no generational differences



69%

Believe that having their information in one electronic platform will reduce the chances of medical errors, again, no generational differences

Over 8 in 10 Canadians are interested in the ability to access all their health information from one platform, including 4 in 10 who are very interested – with no differences across generations, further suggesting this is something Canadians of all ages want and are ready for.

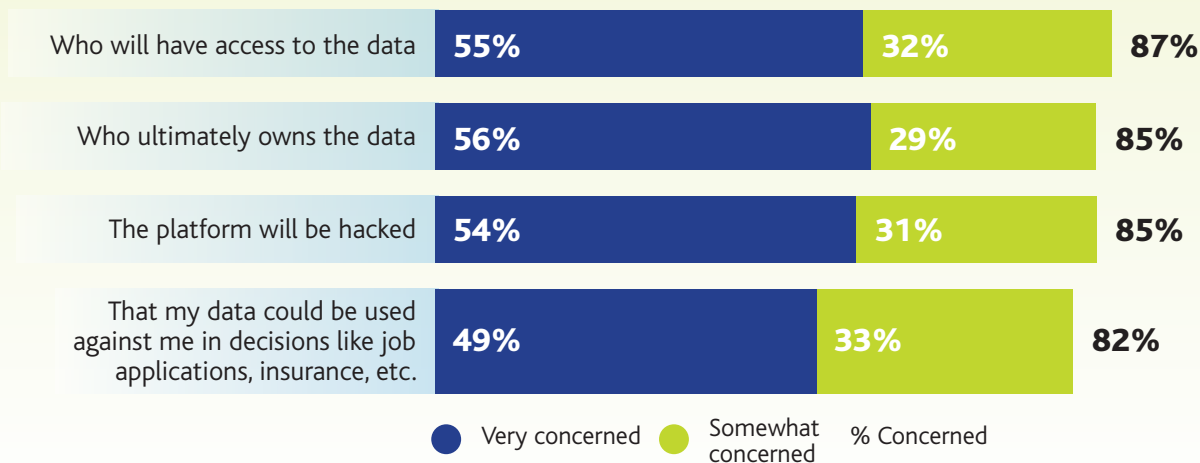


Trust and privacy

This openness to more connected health care comes with concerns, as the majority of Canadians express angst over who will have access to their data, who ultimately owns it, and that it could be used against them in decisions like job applications and insurance. Canadians want control over their personal health data and believe they should get to approve who receives access to their health data, and that they, not the government or technology platforms, own their health data.

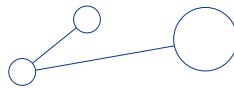
Concerns over online health platforms

While there is interest in online platforms, there are clear concerns that will need to be addressed.



Concern increases with age:

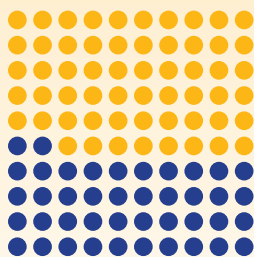
- Who ultimately owns the data (Canadians over 55: 66% very concerned vs. Canadians 18-34: 45%)
- Who will have access to the data (Canadians over 55: 64% very concerned vs. Canadians 18-34: 43%)
- The platform will be hacked (Canadians over 55: 62% very concerned vs. Canadians 18-34: 46%)
- That my data could be used against me in decisions like job applications, insurance, etc. (Canadians over 55: 55% very concerned vs. Canadians 18-34: 40%)



Four in 10 believe that all health care data (e.g. anonymized health records and information from wearables) should be collected and made available to health researchers and governments, and 1 in 3 say they don't care who has access to their health data as long as it's used for good.

Anonymized health data

Four in 10 believe that all health care data (e.g. anonymized health records and information from wearables) should be collected and made available to health researchers and governments, and 1 in 3 say they don't care who has access to their health data as long as it's used for good.



42%

Believe that all health care data such as anonymized health records and anonymized information from wearables such as Fitbits and Apple Watches should be collected and made available to health researchers and governments



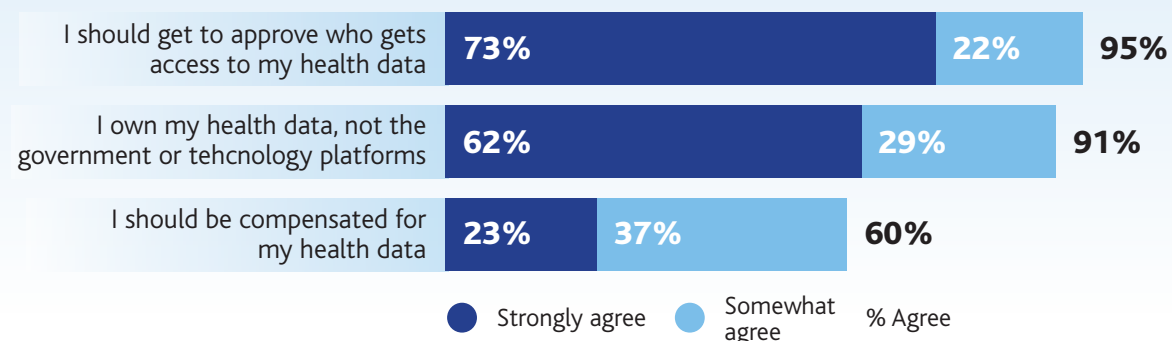
This increases to over half among those 18-34 (54% vs. 42% 35-54, 31% 55+)

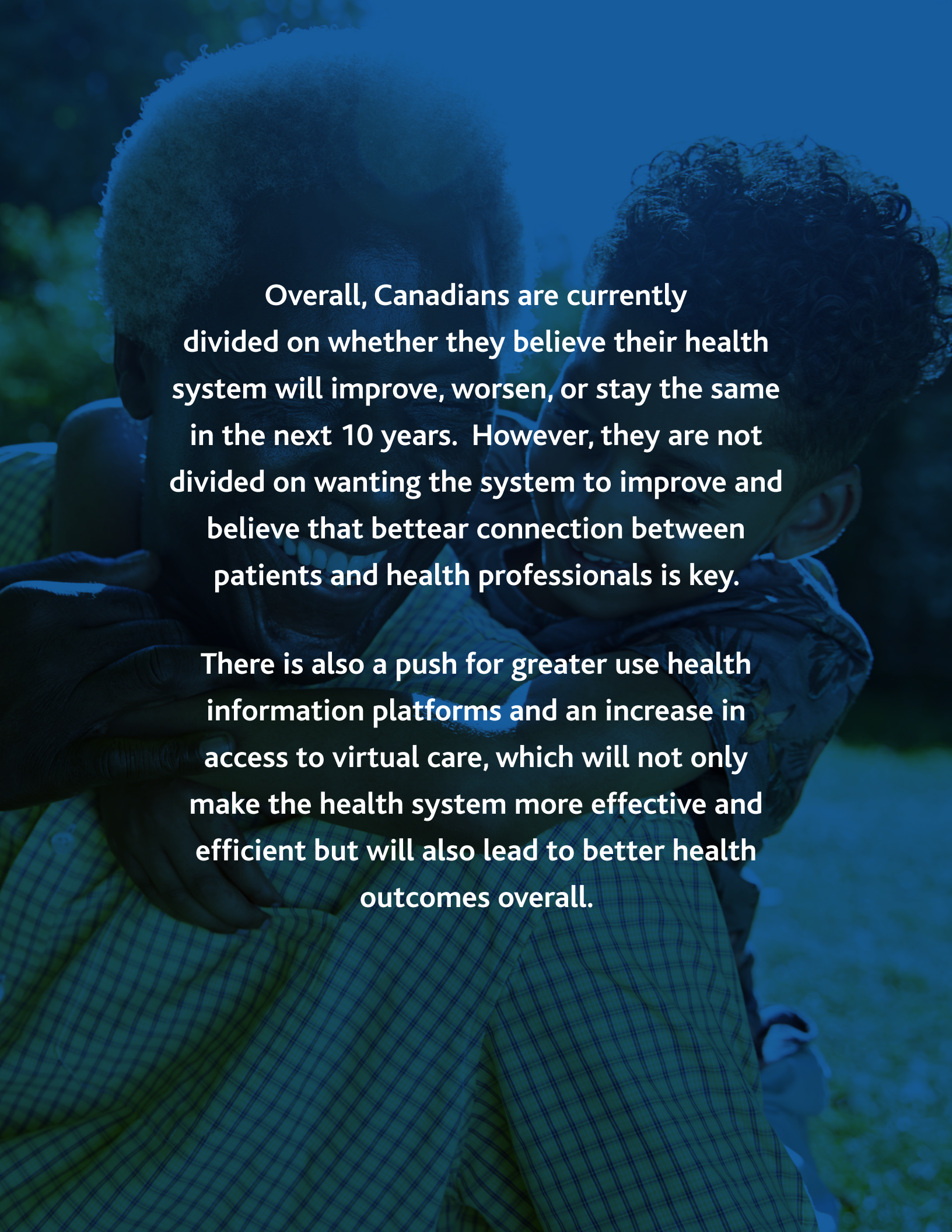
34%

Say they don't care who has access to their anonymized health data if it's being used for good. Those under 35 are significantly more likely to believe this (47% vs. 32% 35-54, 27% 55+).

Control over health data

It is clear Canadians want control over their health data, with over 9 in 10 saying they should get to approve who has access to their health data, and that they own their health data, not the government or technology platforms. Six in 10 also believe they should be compensated for their health data.



A photograph of a man and a young boy embracing outdoors. The man is on the left, smiling, and the boy is on the right, also smiling. They are both wearing patterned shirts. The image has a blue overlay, and the text is centered over the middle of the image.

Overall, Canadians are currently divided on whether they believe their health system will improve, worsen, or stay the same in the next 10 years. However, they are not divided on wanting the system to improve and believe that better connection between patients and health professionals is key.

There is also a push for greater use health information platforms and an increase in access to virtual care, which will not only make the health system more effective and efficient but will also lead to better health outcomes overall.

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