



An in-depth look at the
**Canadian virtual
healthcare landscape.**

While Canadians may have initially hesitated to use virtual care, the COVID-19 pandemic catalyzed a change. In the weeks after the virus forced many healthcare professionals to close the doors of their clinics and health centres, scores of Canadians turned to virtual appointments to receive the care they needed. In fact, 60% of visits became virtual by April 2020.¹

Most Canadians approved of their first foray into virtual care. According to research commissioned by TELUS Health, their experiences were generally positive, with patients citing benefits such as greater convenience and better health outcomes. Not surprisingly, the majority of Canadians now expect virtual care to remain a permanent option.

Patients are not alone in their enthusiasm for virtual care. Companies and employers are embracing virtual care offerings as part of their benefits strategy and employee assistance programs. Camille Lalonde, Head of Clinical Services at TELUS Health Virtual Care, observes that “employers are constantly looking for a way to differentiate themselves in the market and to offer something to make their employees happier and healthier...because a workforce that is well looked after is a more productive workforce.”

Virtual care has emerged as that key differentiator, with extensive benefits. Core to its value for employers and employees is the accessibility of services that virtual care offers: “If you can take a consultation on your phone during a break at work without having to book off an afternoon to sit for hours in your family doctor’s office, that’s huge,” says Lalonde.

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Roe Ben-Eli, Director of Strategic Programs at TELUS Health

Virtual Care, agrees: “While virtual care was previously a nice-to-have, it’s now a must-have. And the pandemic has highlighted just how much is possible virtually.”

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To understand the effect of the changing landscape on Canadians’ expectations and to help organizations deliver offerings that meet the needs of their teams, TELUS Health commissioned two studies on Canadians’ perceptions of virtual care: the Virtual Healthcare Landscape Study conducted by MD Analytics in June 2021 and The Changing Pharmacy and Virtual Care Landscape led by PMG Intelligence in January 2022. This white paper cites key findings from both reports.



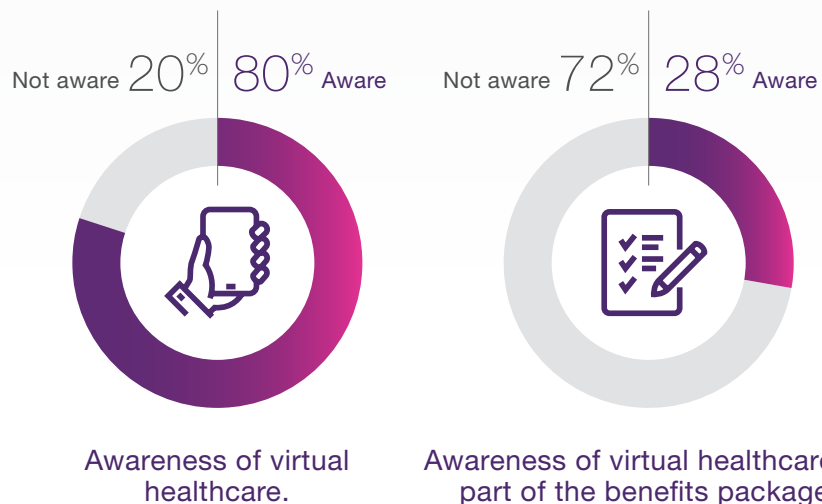
What is virtual healthcare?

TELUS Health defines virtual care as any interaction between a patient and healthcare professional that occurs through communication technology, such as video visits, that enable a patient to consult a healthcare professional face-to-face and receive quality care from the comfort and safety of their home or office.

What Canadians know about virtual care and who is using it.

Most Canadians have heard of virtual care and what it is. According to research conducted by PMG Intelligence,² four in five respondents are aware of virtual healthcare services, while half have used a form of it. MD Analytics found that most Canadians define “virtual healthcare” accurately — that is, as virtual access to healthcare professionals.³ This awareness and interest has increased since 2019, when 71% expressed interest in receiving virtual care as an employment benefit, but only 9% of employers offered it.⁴

Respondents who are more likely to be aware of these services are female, have a health condition, have a primary care physician, currently have group benefits, and have group benefits that cover virtual care.⁵ Moreover, 28% of Canadians with a benefits plan are aware that virtual care is included within it.⁶ Lalonde finds that young working parents are particularly motivated to seek employers that provide the security of personalized benefits programs, and to familiarize themselves with the offerings. “They’re really looking for something that applies not just to them as the employee, but to their family,” she says.



Those who are more educated and have children are among the groups that show the highest willingness to use virtual care,⁷ but comfort levels fluctuate across demographics.

Younger Canadians, for instance, have more confidence accessing healthcare remotely.⁸ In particular, those under age 35—who are now entering the workforce— noted the greatest comfort with using an app or email to access care remotely, while those over 35 are more comfortable with a phone or with video conferencing via a computer or tablet.⁹ Yet this is still an evolving situation: according to Lalonde, “we are continuing to see more and more usage in the 45 to 65 to over 65 group. When they have a good experience, they come back for a second, third, and fourth visit.”



Profile of the average virtual care user.

- Young adult
- Female
- Has a health condition
- Parent
- Lives in Alberta, British Columbia, or Ontario
- Has a primary care physician
- Has a benefits plan that covers virtual care

Despite the evidence that Canadians are overall highly aware of virtual care, Ben-Eli believes that many valuable healthcare services have been overlooked.

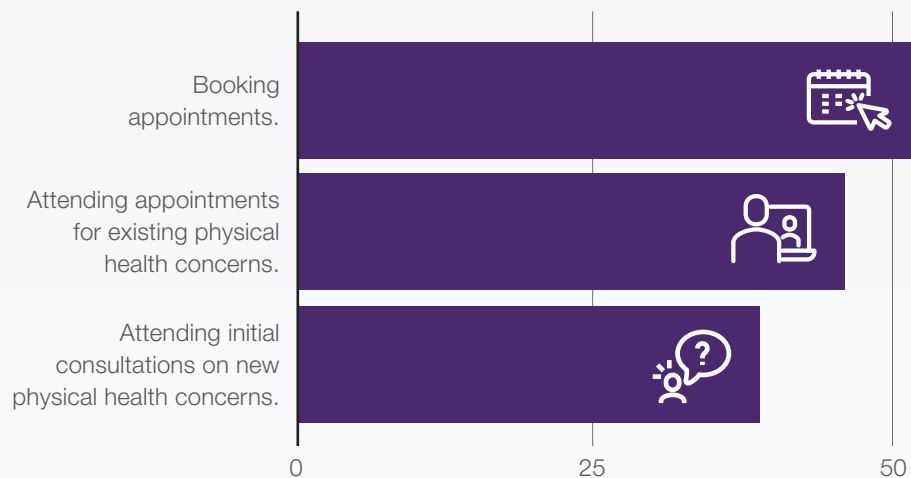
“Virtual care utilization was very high at the start of the pandemic, especially across industries that needed to be screened in order to go to work,” he explains. “But I don’t think people understood the full extent of how they could benefit from it, whether that’s to receive a prescription renewal, consult a doctor, get referrals for x-rays, or see specialists and nutritionists.” However, that’s beginning to change, and Ben-Eli urges employers to take responsibility for educating employees about virtual care benefits to help ensure their teams know what services are available to them.

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How Canadians have used virtual care so far — and their preferences for the future.

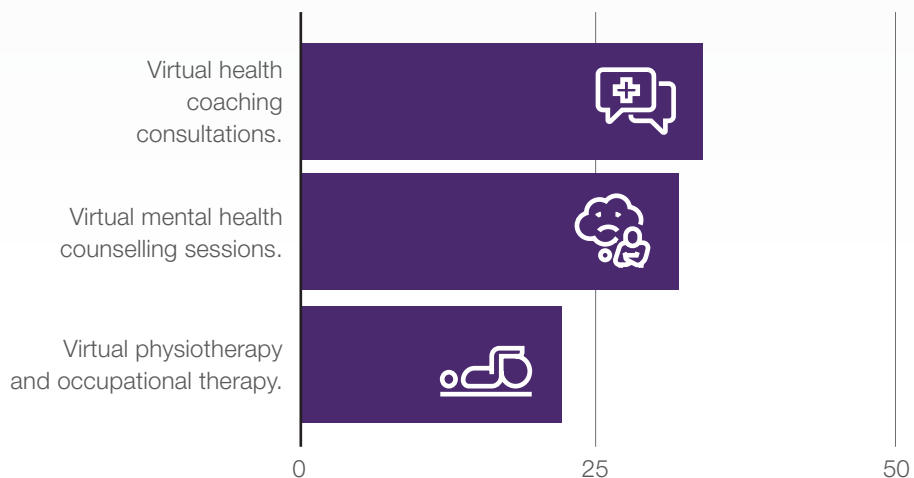
PMG Intelligence discovered Canadians mostly use virtual care to book appointments and attend appointments related to new or existing physical health concerns. In Lalonde's experience, "it's primary care consultations that are the most used service."

How Canadians currently use virtual care.



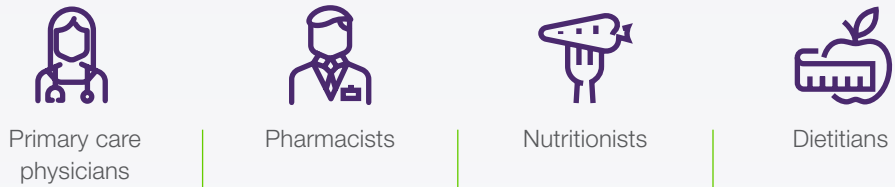
However, the research also revealed that people intended to branch out and widen their use of the service. In June 2021, Canadians expressed they were likely to use virtual care for health coaching, mental health counselling, physiotherapy, and occupational therapy.¹⁰

How Canadians are likely to use virtual care.



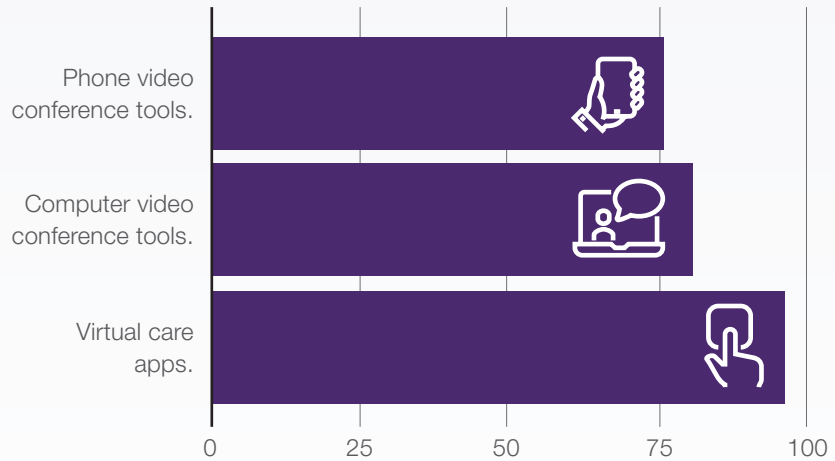
By 2022, their intentions for virtual care had evolved to include consulting primary care doctors, pharmacists, nutritionists, and dietitians.¹¹ This suggests Canadians are becoming more aware of the diverse range of services they can access. Lalonde sees that many employees using virtual care through their benefits plans are using primary care consultations as a starting point to then extend into specialty referrals. “They can access our services, see a nurse practitioner and get a referral to a specialist that they can’t always get in a walk-in clinic or emergency department,” she says. “I’m finding more and more that we’re the gate to help them navigate the healthcare system.”

Healthcare professionals most consulted virtually:



It’s interesting to note that although a large portion of the population came to virtual care abruptly in 2020, they are pleased with their experience.¹² And it’s particularly encouraging to see exceptionally high comfort levels among those who have tried a virtual care app, with 96% of Canadians indicating they were satisfied.¹³

Satisfaction with virtual care services.



A lot of people are realizing that virtual care is not as complicated as they thought it would be. “We’re often getting high satisfaction scores because the experience surpasses what they were expecting.” Not only that, but Lalonde has observed that even technologically inexperienced patients are quickly convinced by their first encounter with virtual care “as they realize that the technology is not scary.”

“ People are realizing that virtual care is not as complicated as they thought it would be. ”

Yet, barriers still remain: those who had poor experiences with video consultations listed awkward interactions and challenges with diagnosis. Technological issues, however, were not as prevalent, suggesting that solutions have come a long way in delivering a seamless patient experience.¹⁴

Reasons that Canadians use (or don't use) virtual care.

Most Canadians appreciate the fact that virtual care reduces travel and makes healthcare easier to access.¹⁵ According to the PMG Intelligence study, 59% indicated they have encountered no barriers to access and experienced no challenges. Yet some cited concerns about security and privacy, the need to have a physical exam or to see symptoms in person, costs, not having the technology, and experiencing difficulty using the platform.¹⁶ In fact, cost was the top factor influencing their likelihood of accessing care,¹⁷ making it an important consideration for employers who can help lower that barrier by adding virtual care to their employee benefits.

What would make Canadians more likely to use virtual care?



Low or no cost



Recommended by their primary care physician



Easy to use



Reduced waiting time and availability



Privacy and security



Offered by employers

Of the minority who do encounter barriers or challenges with virtual care, 58% say they simply prefer in-person appointments,¹⁸ which might reflect a lack of experience with or misperceptions about continuity and the genuine human touch that virtual care can offer.

Lalonde's perspective is that virtual care offers unmatched value to patients who grew up with the "old system" of primary care. "In the past, the same doctor delivered your baby, acted as your paediatrician, followed your parents, and provided in-house palliative care at end of life. We're just not seeing that anymore," she says. And though some limitations remain, Lalonde is optimistic that virtual care is "mirroring what proper primary care used to be" by centralizing and creating continuity within the healthcare experience.



The potential of **virtual care** in **Canada**.

Today, virtual care is being embraced by a wide range of healthcare specialties. This extends beyond primary care to include coaching, counselling, nutritionist and pharmacist consultations, and physiotherapy. And that's only the beginning — specialists across healthcare disciplines are using virtual care in truly innovative ways to elevate how they deliver care.

“[Virtual care] fills the gaps so a person is never left alone when they need support.” That includes extending their support to patients between in-person appointments.

“Telemedicine, asynchronous care, and general monitoring through technology allow us to support employees and plan members between appointments,” Ben-Eli says.

“I think that's a huge area where telemedicine plays a role — it fills the gaps so a person is never left alone when they need support.

The future of virtual care will be elevated by employers, which play a role in facilitating their employees' access. Employer promotion of virtual care would encourage 15% of Canadians to use it.¹⁹ However, according to Ben-Eli, many employers face challenges with implementation, communication, and onboarding to virtual care. They need solutions that streamline and simplify it for their employees, ones that integrate with their existing systems.

“Today, a lot of companies are looking for a more integrated version of virtual care,” he says. “Employers tell us all the time, ‘We want it to be as simple as possible.’ And really that's where the power of TELUS Health comes to the table”: the power of a robust healthcare ecosystem.

The next era.

For countless Canadians, the pandemic brought the advantages of virtual care into focus. As innovation in this space continues, and as employers continue to embrace it, Lalonde sees a future where it shapes employee experience across the workforce:

“I think virtual care is having a massive effect on the general wellbeing of employees. There’s a certain sense of gratitude they have towards their employer for offering this service. We hear that they feel grateful that their employers care about their health and their mental health. And with gratitude comes wanting to give more of yourself to the company that’s giving you, in return, access to healthcare that you may not get elsewhere.”

By understanding Canadians’ attitudes and behaviours toward virtual care, employers can ensure they are delivering products that will best support them.

Leading the charge.

TELUS Health is at the forefront of the movement to enhance virtual care, providing employers and employees with a variety of virtual care solutions:

- **TELUS Health Virtual Care** delivers accessible, personalized support from compassionate clinicians for prescriptions, referrals, medical test requisitions, and more
- **TELUS Health LifeJourney™** evolves the employee assistance program with convenient, 24/7 service to employees, including personalized plans developed by care advocates, that integrates with companies’ existing benefits programs
- **Specialized Digital Therapy** offers effective, lower-cost, self-paced mental health care programs that address a range of employee needs, from managing addiction to returning to the workplace, at a cost that is lower than one-on-one therapy sessions
- **Espri by TELUS Health** caters to the unique mental health and wellness priorities of any organization by enabling employers to deliver mental health resources, from informative articles to peer support, that are targeted to their staff

A variety of digital health solutions and services deliver benefits for patients, healthcare professionals, and organizations.

**How organizations
can benefit from
TELUS Health
solutions.**

Offer quality, on-demand care for employees.

- Help attract and retain top talent
- Help reduce absenteeism

Encourage and help protect productivity.

- Support employees’ mental health and wellbeing

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TELUS Health Virtual Care can help deliver compassionate care, every step of the way.

Learn more at telushealth.com/virtualcare

