

What Canadians Think

Do we really know?



Introduction

Since 2010, Canada Health Infoway has been tracking Canadians' attitudes and perceptions about digital health, through an annual survey.

The insights gleaned from these reports inform *Infoway* strategy and provide an indication of Canadians' levels of support for and awareness of digital health and how they are changing over time.

Methodology

The survey was conducted with members of Harris/Decima's proprietary online panel who are Canadian adults, 18 years of age and over.

The data were been broken out into 6 key audiences, including

- General Population
- Opinion Leaders
- Seniors
- Female Caregivers
- Those with Chronic conditions
- High System Users

Data results were weighted to reflect the population.

There is a high perceived value of digital health for consumers and clinicians

- Nearly all Canadians (93%) continue to support the development of electronic health records (EHRs).
- 74% of the general population believe the federal government should continue to invest in digital health generally.
 - This increases to 84% for opinion leaders and 83% for seniors.
 - This has increased by 15% since 2011 .
- Almost half of Canadians (48%) believe that without EHRs, the quality of health care in Canada will deteriorate over time.
 - This has increased by 9% since 2012.

Canadians want access to health information and services for themselves

- Canadians are consistent across the country and across demographics in their support for consumer-facing technologies such as:
 - View electronic health records (92%)
 - View lab results online (90%)
 - View medications/prescriptions online (89%)
 - Request e-prescriptions (89%)
 - E-book appointments (89%)
- 90% of Canadians believe that these types of investment are worthwhile.
 - This is highest in Atlantic Canada (94%) Ontario (92%) Alberta (93%) and British Columbia (90%); only slightly lower in Quebec (86%).
 - Highest for Canadians 55+ (94%).

There is a gap between what Canadians want and what is currently available

- While Canadians overwhelmingly want access to these services, few are able to access them today:
 - View information (e.g. lab results) online (want: 90% vs can: 11%)
 - Email their doctor (89% vs 11%)
 - Request e-prescriptions (89% vs 6%)
 - E-book appointments (89% vs. 7%)

Canadians want access to health information and services for themselves

- 87% believe government should make consumer health technologies a priority within five years, with 55% saying within 2 years.
- Canadians believe accessing electronic access to health information will:
 - Make accessing healthcare services easier and more convenient (76%). This increases to 88% for opinion leaders and 81% for seniors.
 - Make interacting with multiple healthcare providers better and easier (76%). This increases to 87% for opinion leaders and 83% for seniors.
 - Make the healthcare system more efficient (74%). This increases to 86% for opinion leaders and 81% for seniors.

There's a significant opportunity to make health care easier and more efficient with innovative 'patient online' services

- A significant proportion of those who have used a consumer health solution such as e-scripting; e-booking; accessing records online or virtual visits claim they have avoided an in-person visit.
 - 63% avoided an in-person visit because they could request the prescription electronically.
 - 58% avoided an in-person visit because they had an online consultation with the health care provider.
 - 47% avoided an in-person visit because they used an electronic medical record.



Canada Inforoute
Health Santé
Infoway du Canada

Thank you

Shelagh Maloney
smaloney@infoway-inforoute.ca
@12Maloney

Research Approach

National Survey	1,512
Atlantic	90
Quebec	324
Ontario	667
Manitoba/ Saskatchewan	91
Alberta	150
British Columbia	190
Opinion Leaders	181
Seniors	498
Female Caregivers	190
Chronic Condition	673
High System Users	141
Field dates	February 24 – March 12, 2014
Survey length	15 minutes

Definition of Key Audiences

Key Audiences	Definition
General Population	Representative sample of Canadian adults 18+ based on age, gender and region.
Opinion Leaders	Occupation = Executive/Managerial or Professional and income of \$80K+; above average activism (e.g. writing on blogs/letters to media, volunteerism, talk about political and social issues) and above average early adopter.
Seniors	Representative sample of Canadians aged 55+ based on gender and region.
Female Caregivers	Women aged 40+ who have an adult family member, relative or close friend 50 years of age or older that they are personally helping deal with their healthcare issues.
Chronic Condition	Those suffering from a chronic disease, illness or condition.
High System Users*	Those who have used the healthcare system 20 times or more in the past 6 months.

*Valid open-ended responses from High System Users are coded as their actual value (as opposed to another number as previously done in 2013) which would accurately depict the number of interactions respondents have had with the health care system. Valid open-ended were counted once towards the total health care interactions.