## Virtual care adoption is here to stay. For some Canadians—even after the pandemic.

Embracing virtual Health Care really depends on how Canadians view their health and use technology



Healthy Techies and Busy Singles are most interested in health tech adoption.



program must be challenging

and rewarding.

but still likes an in-person visit. diet. Health management

Busy Single Riteish Average health but can't make the time to improve. Likes to save time with virtual consults, particularly for mental needs,

Enthusiastic about apps and

sharing the data they collect.

17%



**Healthy** Retiree Anne

29%

In good health, with a managed chronic condition, and very proactive in staying healthy. Not too concerned about privacy, and not interested in apps-but could be, if those are recommended by a doctor.



Jessica In poor physical and mental health, takes medication and works with a healthcare professional to manage this condition. Heavy user of virtual

consults, moderate user of

health apps.

Michael In decent health, prefers to see doctors face-to-face. Skeptical of the new tech due to lack of exposure, distrust, or both. Concerned with data security, unwilling to share data. Does not use wearables or apps.

26%

Tech

**Skeptic** 

**81%** 

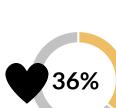
**63%** ▲

Advanis identified five (5) segments/personas among study participants using the Multiple Correspondence Analysis and Hierarchical Clustering approach to segmentation. Segments differ in their openness to health tech adoption, from ■ most interested to ■ least interested.



OVERALL HEALTH ASSESSMENT

Just over 6 in 10 Canadians report they are in good physical health, while 4 in 10 struggle with their mental health...

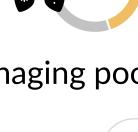


physical health as average or poor

describe their



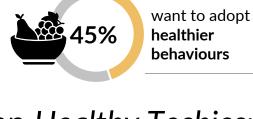
describe their mental health as average or poor



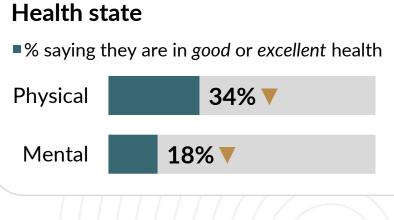
Mental

a chronic condition

say they have



Midlife Strugglers more likely to be managing poor health than Healthy Techies:









Virtual healthcare during the pandemic has fueled post-pandemic adoption.

virtual consultation

uptake before

the pandemic

VIRTUAL CONSULTATIONS

Uptake of virtual health

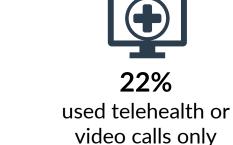
The phone is the preferred mode for virtual health consultations:

consultations has grown **6 times** 

compared to pre-pandemic:



9%





virtual consultation

uptake since

the pandemic

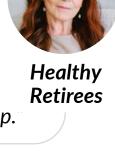
"My regularly scheduled appointments with my neurologist are twice per year. My MS hasn't

VS.

But...Healthy Retirees and Busy Singles still want to consult face-to-face...

progressed, so a phone appointment is totally acceptable to me. If it were to progress, I would change my appointments to in person with him. With my family doctor I may need an appointment because something new cropped up.

44%





environment, rather than my own home where things can get hectic."

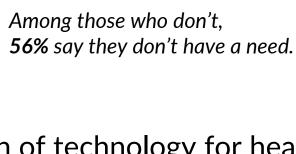
I would much rather be in a more calming

"While I enjoy virtual consultations,



sensors—but adoption of more advanced technology remains low. % of Canadians using health-related apps on a type of device:



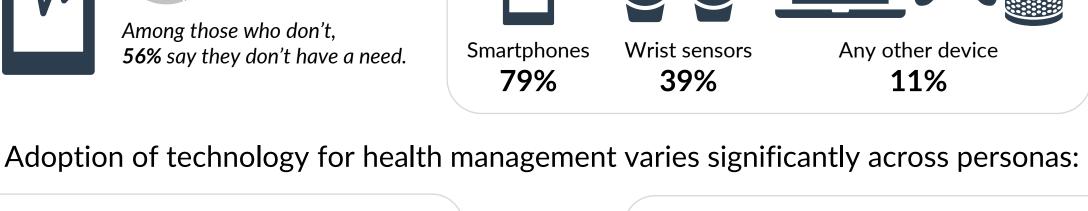


use a health-

related app

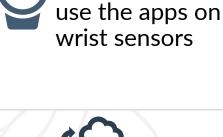






100% 0%▼ 88% **28%** 





if offered by

an employer







an insurance company

56%

if offered by

use health



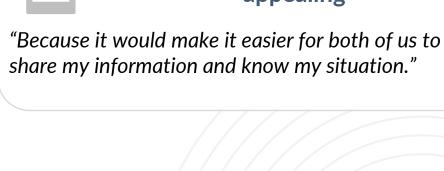
use the apps on

wrist sensors

Not surprisingly, app-enabled health platforms are more appealing to Busy Singles than Tech Skeptics:

VS.

management program in exchange for rewards to improve their health.





A centralized government health portal...

% agreeing with statement

allows healthcare

do their jobs

85%

**64%** 

appealing

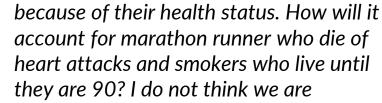
find the program





Tech

**Skeptics** 



find the program

"This sounds like ... a platform that will

governments to discriminate against people

allow companies and potentially

unappealing



insurance

companies

55%

But privacy concerns linger.

DIGITAL HEALTH DATA



87%

allows patients to be

more in-tune with

their healthcare

94% ▲ find the portal

appealing "Ease of access to my own personal data, being able to bypass calling offices for appointments, being able to access data and supports without

Midlife Strugglers

privacy concerns would

using it

providers to better make me uncomfortable



**Skeptics** 

physician

potential for someone's health records being tampered/altered is exponentially

having to make an in-office visit, freeing up my healthcare providers to see people who are truly unwell." **ADVANIS** 



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For more details contact

**75%**▼ find the portal appealing Tech "Hackers [are] going to hack [it] and the

specialists

high."