



Virtual Healthcare **Industry Report**

September 2020 Update

 **TELUS** Health



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Introduction

Welcome to the TELUS Health Virtual Healthcare Industry Report, September 2020 Update.

In 2019 Medisys Health Group, now part of TELUS Health, launched a virtual healthcare industry report, Virtual Healthcare in Canada: The solution at our fingertips based on the most recent data available at the time.

Following significant developments in healthcare access and delivery since the release of the report, TELUS Health initiated this research update to be able to report on the changes to Canadian healthcare in recent months.

The 2019 report stated a hope that 2019 would be Canada's year to embrace virtual care — the gravely needed healthcare service at our fingertips. However, amidst the tragic circumstance of a global pandemic it appears as though 2020 will in fact be marked in history as the year that virtual care was propelled forward in Canada. Virtual care is clearly here to stay and evolve.

The following update was developed based on research and perspectives that were available at the time. It will address both changes to virtual healthcare in Canada to date, as well as new perspectives on expected outcomes following this significant cultural shift.



Dr. Dominik Nowak
Physician Lead and Chair,
TELUS Medical Advisory Council



Dr. Van Hoa Phong Le
Medical Director,
Medisys Occupational Health Clinic

The brink of change: Canadian healthcare enters 2020.

By late 2019 it was clear that an explosion of interest in pursuing digital health strategies had begun in Canada.¹ It's now clear that 2020 was the true turning point.

In 2019 the majority of Canadian physicians' offices and primary care facilities used some form of digital record keeping.¹ More specifically, 86% of family doctors in Canada were using electronic medical records (EMRs), a 13% improvement compared to the 73% adoption reported in 2015.²

According to Canada Health Infoway, a 2019 survey of Canadians showed that 63% said they would like to connect with their care providers by email, 58% said they'd like to use SMS or an app, and 44% said they'd like to use video calls.³ Similarly, the Ontario Telemedicine Network reported 1,045,389 virtual events (a 36% increase from the year prior) and 353,000+ patients accessing virtual care - more than ever seen before.⁴



Canada has really been delivering
analogue health care in a digital world.⁵

- Dr. Gigi Osler, Virtual Care Task Force co-chair for the Canadian Medical Association



In 2018, 62% of Canadians surveyed found quality of virtual care to be no different from that of office visits.⁶ In contrast, Canadian adoption of virtual solutions for healthcare delivery lagged significantly behind its Commonwealth (CMWF) counterparts.²

Despite efforts to drive the adoption of digital health solutions, such as ongoing programs and initiatives launched by Canada Health Infoway, Canadian adoption of virtual healthcare remained comparatively low. In 2019 it was reported that fewer Canadian primary care practices offered their patients the option to electronically view their information and make requests, including viewing patient visit summaries online (Canada: 5%; CMWF: 26%) and requesting prescription renewals online (Canada: 10%; CMWF: 52%).²

Thus, as Canada entered 2020, there was no shortage of mechanisms for virtual healthcare — as there had been for decades¹ — but still in 2019 the barriers to adoption remained high and consequently access and outcomes remained low.¹



Pandemic culture: A new relationship with virtual care.

The early months of 2020 brought a period of significant social, cultural and economic change as the COVID-19 pandemic spread across the world. Seemingly overnight, Canadians were forced to adapt to a new and unsettling reliance on technology for work, social gatherings, education, healthcare and more.⁷

Within a matter of weeks, the new realities of a pandemic culture had turned Canadian healthcare access and delivery on its head:



60% of visits became virtual rather than in-person by the end of April (up from 20%).³



240% growth in virtual care, and 114% growth in virtual mental health (new users over existing users).⁸



81% satisfaction among patients was reported when asked about the modality of their virtual visit.⁹

But what is virtual care, really?

Simply put, virtual care is any interaction between a patient and a care professional that occurs via communication technology.

Often used interchangeably with telehealth, telemedicine and digital healthcare, virtual care more specifically enables easier, smarter and faster healthcare that helps to minimize geographic and socio-demographic and cultural barriers.⁴

Although it is understood to be a subset of telehealth, virtual care encompasses far more than video conferencing. Phone calls, texts, emails, video-conferencing and remote monitoring with wearable devices are all examples of channels used for virtual care.¹¹

To date virtual care has been used primarily for traditional patient consultation, however significant opportunities for more in-depth diagnosis and treatment remain.

“ People often think about virtual care or telemedicine based on the technology. But virtual care is really about being able to deliver care over space and time. It is a mindset.¹² ”

- Dr. Sacha Bhatia, Chief Medical Innovation Officer, Women's College Hospital

Key challenges

As virtual healthcare grows in popularity, so too do the challenges that it poses for both patients and providers. According to Dr. Nowak, some key challenges resulting from increased reliance on virtual means of healthcare delivery include:

1. Digital literacy - the general ability to understand and manipulate the internet and supporting technology becomes a social determinant of health when the delivery of care is reliant even partially on virtual solutions.
2. Continuity of care could be disrupted as virtual means of care become increasingly prominent. To protect quality of care and to ensure the patient remains heard and understood, patient-centered care must remain a top priority for all providers.
3. The prioritization of physical visits for both diagnosis and as a ritual that furthers the therapeutic relationship between patient and healthcare professional may be threatened amidst advancements in virtual care.

Canadian healthcare frameworks: A swift transition.

In 2019, the Canadian Medical Association's Virtual Care Task Force reported that a national framework for virtual healthcare was required to establish standards for quality service and continuity of care.¹ In the absence of this national framework, the last three decades have seen efforts to implement virtual care at the provincial/territorial level only.¹

Alongside improvements to health technology and data sharing, virtual care has become a core part of the healthcare ecosystem, however jurisdictional differences continue to act as a barrier. Without the patient as the connector, Canadians will run into the challenge of facing 12 jurisdictions that are not – and cannot be – linked.¹²

Early reports following the outbreak of the pandemic showed significant reductions in overall patient loads (-50%), new diagnoses (-60%) and prescribing levels (-52%).¹³

In response, governments and communities made quick changes to keep in accordance with the health authorities' recommendations for more use of telehealth.¹⁴

The federal government increased funding to virtual healthcare programs to support Canadians and help ease the burden on the healthcare system.¹⁵ In Ontario, the Minister of Health made an order to temporarily list the assessments of or counselling to insured persons by telephone or video as insured service.¹⁶

Businesses and insurers are being prompted to react similarly. The CDC recently recommended that health plans, healthcare systems and insurers message beneficiaries to promote the availability of covered telehealth, telemedicine, or nurse advice line services.¹⁴

“ Healthcare doesn't tend to move at the pace of other industries, but these circumstances have advanced things by 10 years in 30 days.¹² ”

- Dan Pawliw, General Manager, Akira by TELUS Health

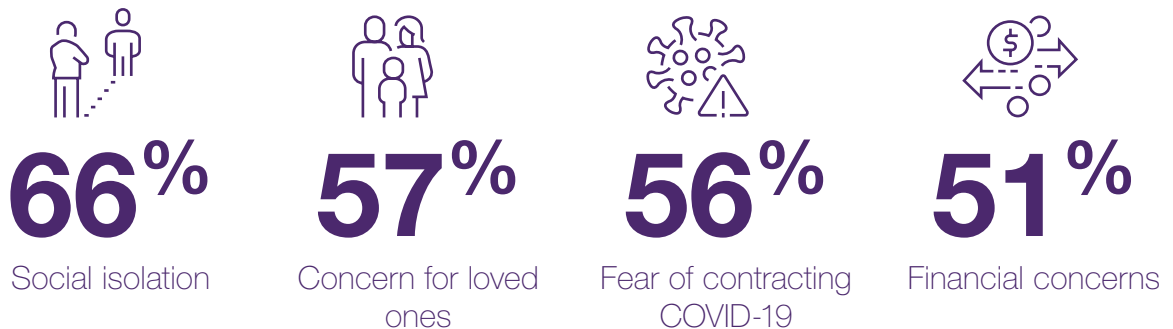
The next frontier: Virtual mental health.

A clear side-effect of the changing social and cultural circumstances of many Canadians in the first half of 2020 has been a decrease in overall mental health and wellness.

A shocking 56% of Canadians have reported negative impacts to their mental health since the outbreak of this global pandemic.¹⁷

A recent survey found that although only 5% of those surveyed reported high-to-extreme levels of anxiety prior to the pandemic, that number increased to 20% after the outbreak.¹⁷

Leading causes for COVID-related mental health issues include:¹⁷



Considering the severity of the impact that global events have on the mental health of Canadians, government leaders talk about mental health almost every day at their news briefings. In May 2020, Justin Trudeau announced an investment of \$240.5 million to develop, expand, and launch virtual care and mental health tools for Canadians.¹⁵

Similarly, virtual mental health service providers are working to increase capacity and provide Canadians with much needed support. In June 2020, TELUS Health reported increased demand for Akira by TELUS Health virtual mental health services up to 7 times what they were before the outbreak of the pandemic.⁸

It's clear from reports that those who engage in virtual mental health have found their experience to be successful. 48% of participants in a recent survey responded that they intend to continue using, or to increase their use of virtual mental health services.⁸

Thus, a significant opportunity remains in the delivery of mental health services to Canadians via virtual care.



Moving forward: The virtual first model of care.

It's clear that in the future, healthcare industry leaders will need to take a closer look at the effectiveness of virtual care in treatment to accurately pinpoint successes and failures of the pandemic culture of care. These are still early days.

“ There has been a bit of a free for all in terms of how this has been done. We're actively going to be engaged in trying to understand what the impact of this has been, so that we can optimize best practice moving forward.”⁴

- Dr. Sasha Bhatia, Chief Medical Innovation Officer, Women's College Hospital

The consensus to date has been that the continued combination of virtual care with in-person visits will be key to success in healthcare models moving forward.¹²

A survey from May 2020 showed that 38% of Canadians from across age groups would prefer virtual methods rather than in-person as the first point of contact with their doctors moving forward.²⁰

It's clear that virtual care will play a significant role in Canadian healthcare moving forward. The question is, how significant? A survey of healthcare executive attitudes toward virtual care that was released prior to the pandemic found that 50% of those surveyed thought at least a quarter of all outpatient care, preventive care, long-term care, and well-being services would move to virtual delivery by 2040.²¹

Will this predicted timeline hold up, or might it be surpassed? Will today's increased adoption of virtual healthcare solidify interest in similar models of care delivery in years to come, or will we see a retrenching to where we were? In the words of Dr. Sacha Bhatia, this is the “multi-billion-dollar question.”¹²

Appendix

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