



albertapathients

Your Voice Matters

# albertapathients Virtual Care

February 2021

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This research was conducted with and for the albertapatients.ca online community, operated by the Alberta Medical Association and research partner ThinkHQ Public Affairs Inc.

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## >> Research Methodology

- Online survey was fielded via the albertapathients online research panel
  - Field dates: February 2 - 10, 2021
  - Sample size: n=4,354
- Results reflect a representative sample of patients in Alberta
- Data was weighted to reflect gender, age and region of Albertans who have used the health care system within the past year
- A random stratified sample of albertapathients.ca panelists were invited to complete the survey. For interpretation purposes, a probability sample of this size would yield a margin of error of +/- 1.5 percentage points 19 times out of 20 at a 95% confidence interval
  - Accuracy of sub-samples of the data decline based on sample size

# The Physician Relationship



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## >> The Physician Relationship

Most patients in Alberta have consulted with a physician since the first COVID outbreak in March 2020 – 84% say they have used a family physician, and 46% a specialist.

Utilization is modest. A little over one-fifth (22%) have frequent contact with physicians (at least once a month), while a plurality (42%) say they consult with a doctor every few months and about one-third (35%) require a physician two or less times per year.

Fewer than one-in-ten (7%) of patients report that they do not have a family physician, while most (71%) say they consult exclusively with one family doctor. One-in-five (20%) say they generally see one family doctor, but sometimes might receive care from another physician at their clinic, while 2% have a roster of doctors who see them at their “home clinic”.

**Alberta’s family physicians receive strong ratings from patients, particularly with respect to their skills, but also in terms of the overall management of care and the patient relationship.** Fully 87% of patients characterize their overall relationship with their family doctor(s) as excellent/very good, similar to the ratings for the care they receive from them (86%).

Continued ...  
➔



## The Physician Relationship

... Continued

Thinking about the patient experience in family medicine, the attributes where physicians receive relatively weaker scores tend to focus on access and convenience:

- Three-quarters (75%) offer positive ratings with respect to the convenience of consulting with their family doctor(s) and timeliness of setting an appointment
- Two-thirds (68%) offer top marks to their family doctor(s) with respect to the convenience of their clinic hours



# The Physician Relationship

## Access Issues

A sizeable minority (39%) of patients report that in the past 12 months, there has been at least one incident where they have been unable to consult with their family physician about a concern they were having, with 6% saying this is a frequent occurrence.

- This tends to happen more commonly with patients under 55 years of age, and among those managing chronic conditions

Among those who have had access issues with their family doctor, scheduling is a major impediment – getting a timely appointment or finding an appointment that would meet the patient's schedule. Clinic hours are also an issue for patients (one-third note this was the reason they were unable to access their physician for their needs), along with one-fifth (22%) saying their condition required more urgent/emergency care.

In these instances, most patients seek alternative physician care – 42% say they went to a walk-in clinic, and 28% made an appointment with another doctor or went to urgent/emergency care. Roughly four-in-ten (37%) noted without a doctor's appointment, they attempted to research/treat their issue themselves (online sources, OTC meds, etc.), while about one-quarter (24%) opted for assistance from 811 or a virtual care provider like Babylon/Maple.



## The Physician Relationship

### Your Primary Care Team

Of those with a regular family doctor(s), just over one-half (51%) report that their care exclusively involves consulting with their physician(s), while 43% say they have contact with other members of their primary care team such as nurses, dietitians, physiotherapists, visiting specialists, etc.

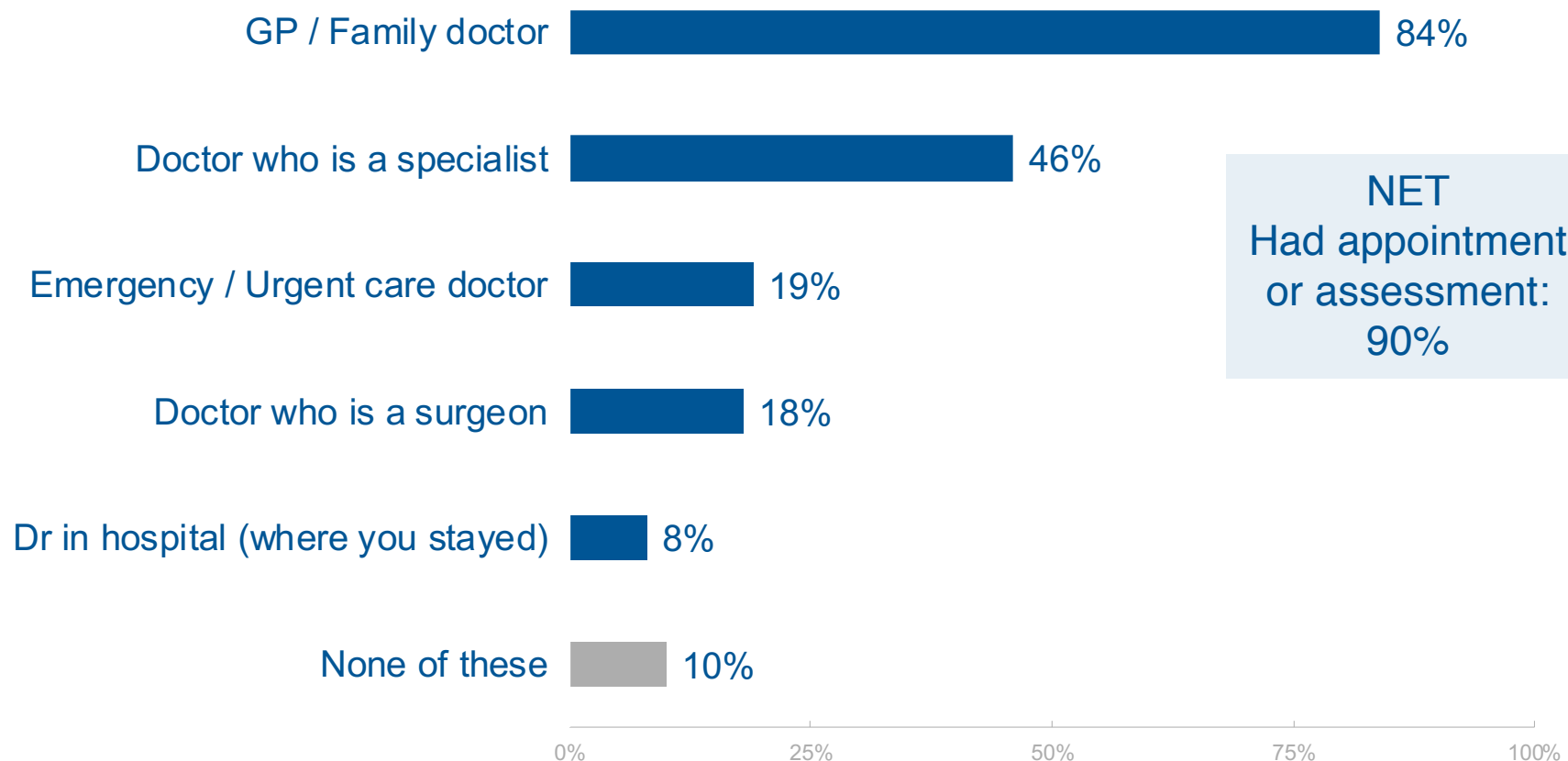




# Health System Utilization

Since March 1, 2020

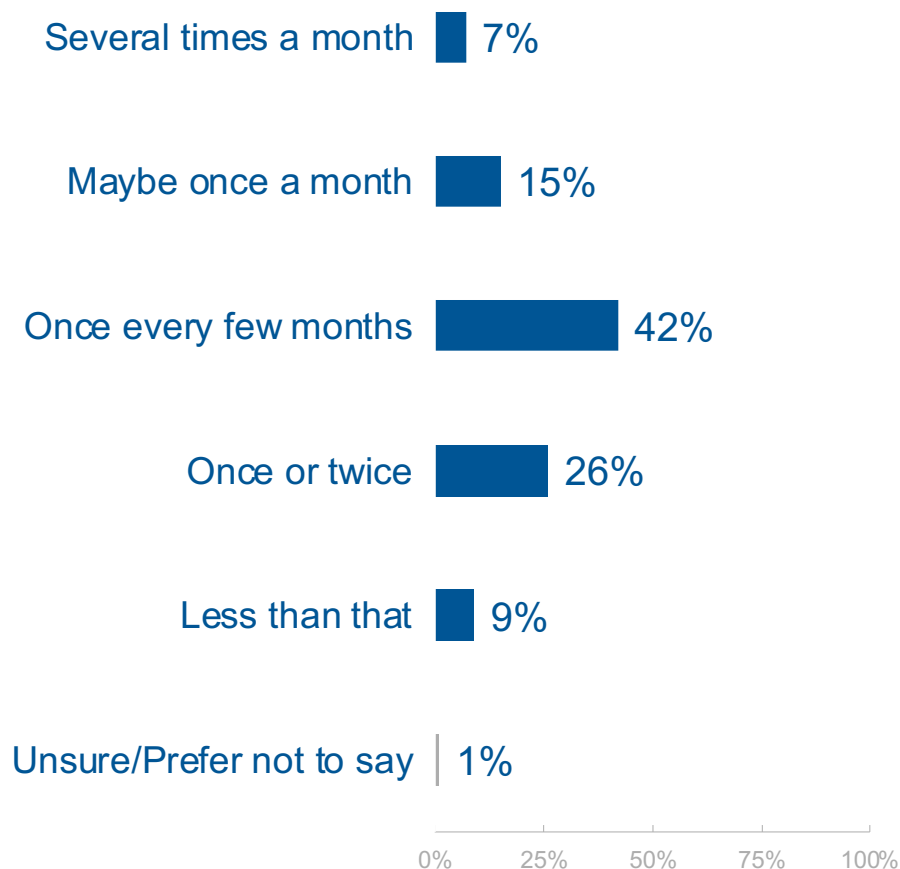
*"Since March 1st, 2020 have you personally had an appointment/assessment, either in person, over the phone or by video-conference, with any of the following health care providers?"*



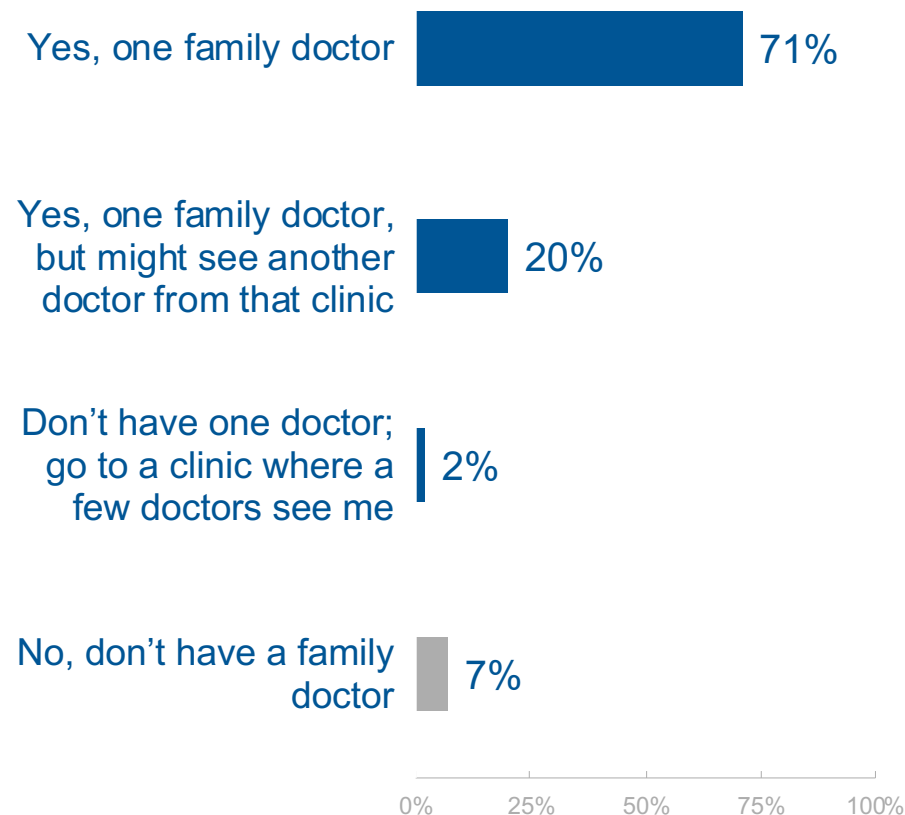
MULTIPLE MENTIONS | Base: All respondents (n=4,354)

## >> Health System Utilization

*"Still thinking about yourself, over the past year how often would you estimate that you received care or advice from a physician (of any type)? Was it...?"*



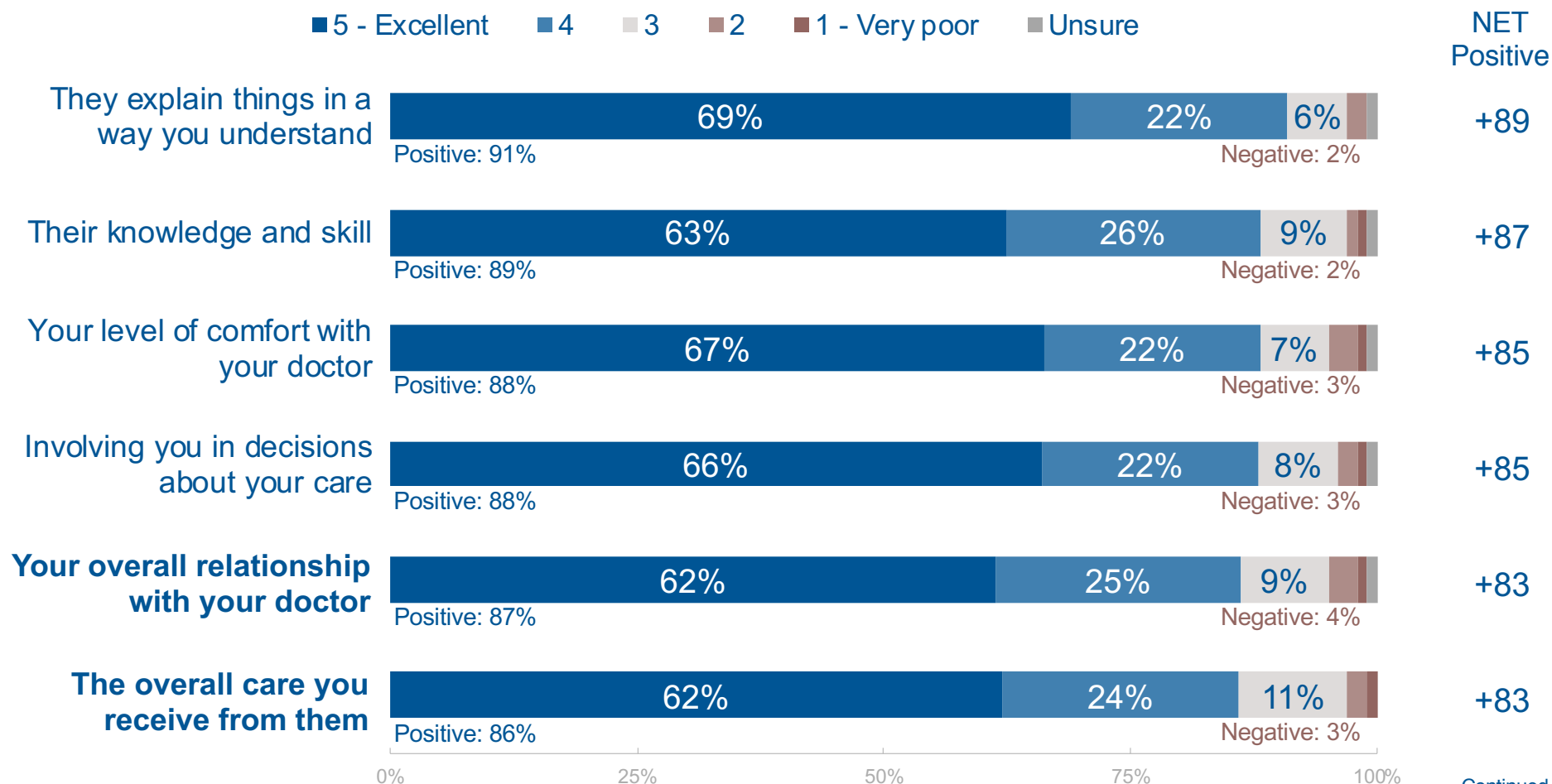
*"Thinking specifically about primary care, do you personally currently have a family doctor who you usually see or consult with for any health concerns and check-ups?"*



Base: All respondents (n=4,354)

## >> Patients Evaluate Attributes of Care from Family Doctor

*“When it comes to the care you receive from your family doctor(s), how would you rate each of the following? Please use a scale anywhere from 1 to 5 where 5 means Excellent and 1 means Very Poor.”*

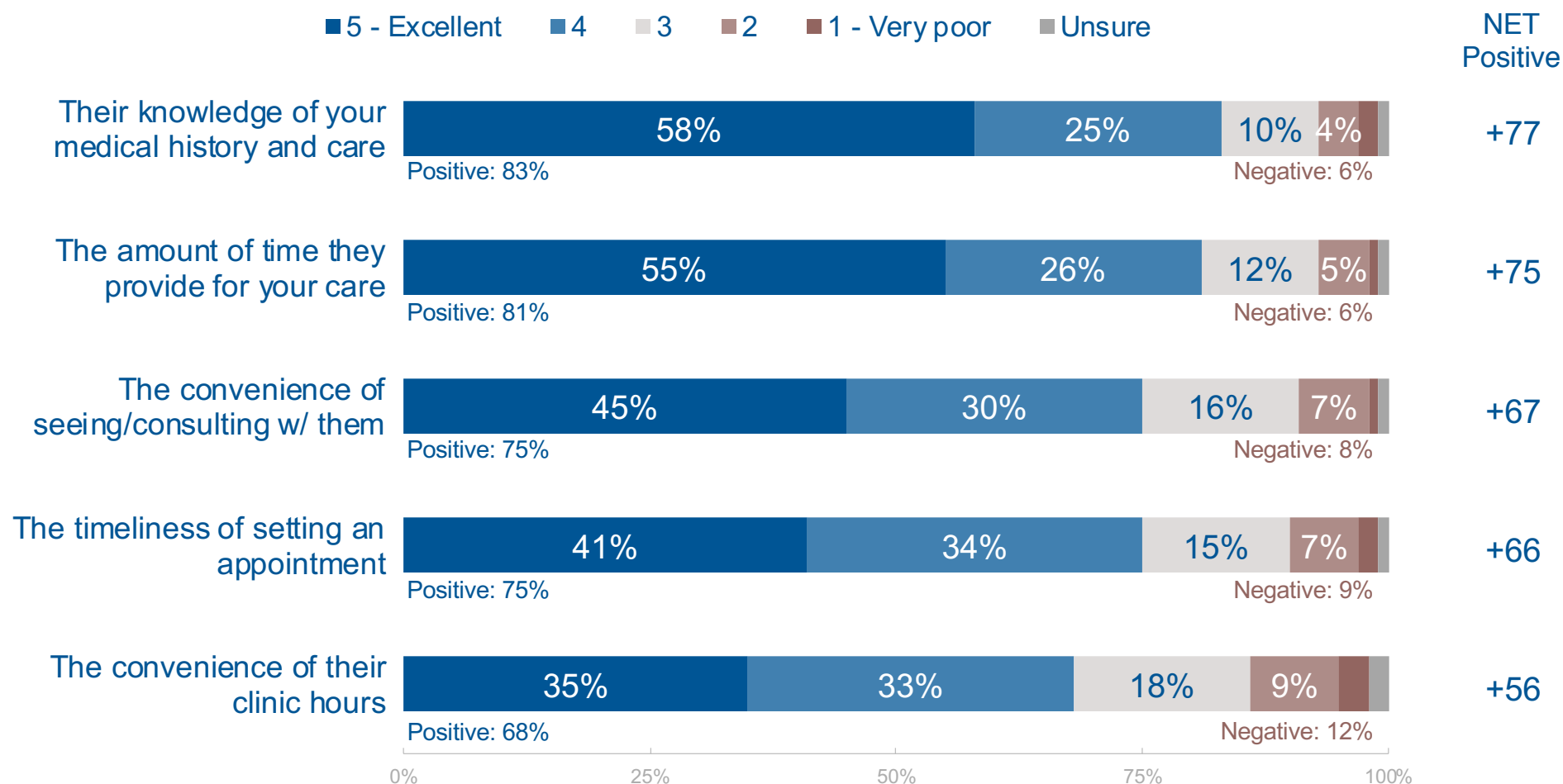


Continued ...

NET: Positive minus negative | Base: Has a family doctor (n=4,043)

## >> Patients Evaluate Attributes of Care from Family Doctor

*“When it comes to the care you receive from your family doctor(s), how would you rate each of the following? Please use a scale anywhere from 1 to 5 where 5 means Excellent and 1 means Very Poor.”*



NET: Positive minus negative | Base: Has a family doctor (n=4,043)



# Patients Evaluate Attributes of Care from Family Doctor

By Region

*“When it comes to the care you receive from your family doctor(s), how would you rate each of the following? Please use a scale anywhere from 1 to 5 where 5 means Excellent and 1 means Very Poor.”*

% saying excellent (4 or 5)	Total (n=4,043)	Region				
		CGY (n=1,438)	EDM (n=1,288)	North (n=442)	Central (n=456)	South (n=420)
Their ability to explain things in a way you understand	91%	89%	94%	88%	94%	93%
Their knowledge and skill	89%	86%	92%	88%	90%	85%
Your level of comfort with your doctor	88%	86%	92%	87%	88%	90%
Involving you in decisions about your care	88%	87%	89%	84%	88%	88%
<b>Your overall relationship with your doctor</b>	<b>87%</b>	86%	90%	84%	85%	87%
<b>The overall care you receive from them</b>	<b>86%</b>	84%	89%	80%	86%	85%
Their knowledge of your medical history and care	83%	82%	87%	81%	84%	80%
The amount of time they provide for your care	81%	78%	86%	77%	81%	82%
The convenience of seeing/consulting with them	75%	73%	80%	69%	71%	75%
The timeliness of setting an appointment with them	75%	77%	76%	65%	76%	74%
The convenience of their clinic hours	68%	67%	70%	68%	71%	69%

 Significantly higher

 Significantly lower

Base: Has a family doctor



# Patients Evaluate Attributes of Care from Family Doctor

By Age

*“When it comes to the care you receive from your family doctor(s), how would you rate each of the following? Please use a scale anywhere from 1 to 5 where 5 means Excellent and 1 means Very Poor.”*

% saying excellent (4 or 5)	Total (n=4,043)	Age (Years)			
		<45 (n=1,976)	45-54 (n=723)	55-64 (n=667)	65+ (n=677)
Their ability to explain things in a way you understand	91%	90%	93%	92%	94%
Their knowledge and skill	89%	86%	89%	91%	93%
Your level of comfort with your doctor	88%	86%	89%	90%	92%
Involving you in decisions about your care	88%	85%	89%	89%	91%
<b>Your overall relationship with your doctor</b>	<b>87%</b>	<b>85%</b>	<b>86%</b>	<b>89%</b>	<b>91%</b>
<b>The overall care you receive from them</b>	<b>86%</b>	<b>83%</b>	<b>84%</b>	<b>89%</b>	<b>90%</b>
Their knowledge of your medical history and care	83%	80%	85%	88%	89%
The amount of time they provide for your care	81%	78%	81%	84%	87%
The convenience of seeing/consulting with them	75%	70%	76%	79%	84%
The timeliness of setting an appointment with them	75%	73%	72%	78%	82%
The convenience of their clinic hours	68%	63%	72%	73%	79%

☐ Significantly higher

☐ Significantly lower

Base: Has a family doctor



# Patients Evaluate Attributes of Care from Family Doctor

By Gender and Chronic Condition

*“When it comes to the care you receive from your family doctor(s), how would you rate each of the following? Please use a scale anywhere from 1 to 5 where 5 means Excellent and 1 means Very Poor.”*

% saying excellent (4 or 5)	Total (n=4,043)	Gender		Chronic Condition		
		Male (n=1,978)	Female (n=2,064)	Self (n=1,968)	Other (n=1,134)	None (n=1,431)
Their ability to explain things in a way you understand	91%	91%	92%	89%	93%	93%
Their knowledge and skill	89%	88%	89%	88%	89%	89%
Your level of comfort with your doctor	88%	89%	88%	84%	89%	92%
Involving you in decisions about your care	88%	87%	88%	86%	88%	87%
<b>Your overall relationship with your doctor</b>	<b>87%</b>	<b>88%</b>	<b>86%</b>	<b>85%</b>	<b>87%</b>	<b>88%</b>
<b>The overall care you receive from them</b>	<b>86%</b>	<b>84%</b>	<b>87%</b>	<b>83%</b>	<b>85%</b>	<b>87%</b>
Their knowledge of your medical history and care	83%	84%	83%	83%	86%	83%
The amount of time they provide for your care	81%	80%	83%	78%	82%	82%
The convenience of seeing/consulting with them	75%	73%	77%	73%	76%	76%
The timeliness of setting an appointment with them	75%	76%	74%	73%	76%	75%
The convenience of their clinic hours	68%	71%	67%	66%	69%	71%

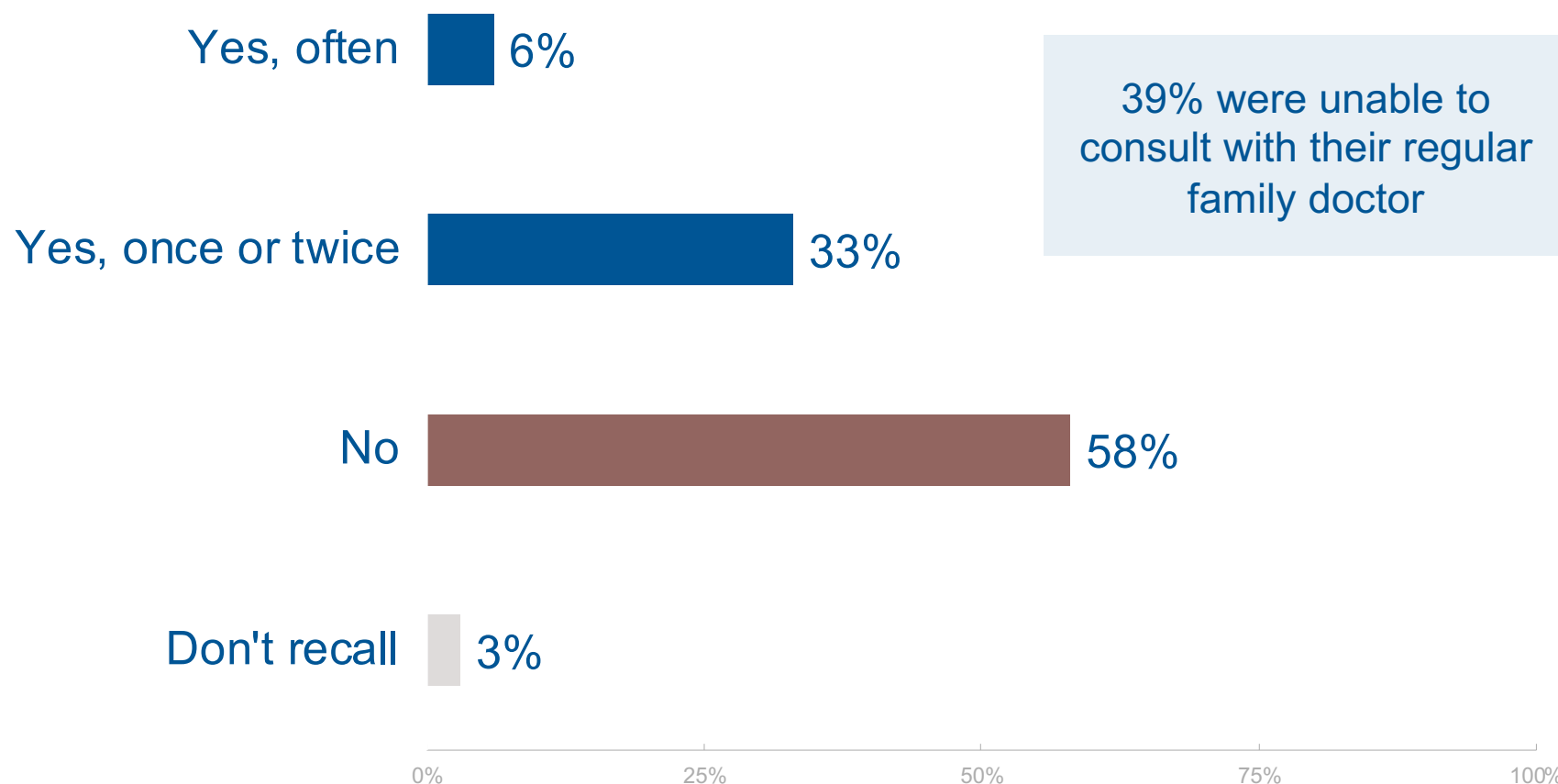
☐ Significantly higher

☐ Significantly lower

Base: Has a family doctor

## >> Family Doctor Consultation Availability

*"In the past year, have you ever found yourself in a situation where you were not able to consult with your regular family doctor(s) about a health issue you were having?"*



Base: Has a family doctor (n=4,043)



# >> Family Doctor Consultation Availability

## By Age and Chronic Condition

*"In the past year, have you ever found yourself in a situation where you were not able to consult with your regular family doctor(s) about a health issue you were having?"*

		Age (Years)				Chronic Condition		
	TOTAL	<45	45-54	55-64	65+	Self	Other	No
	(n=4,043)	(n=1,976)	(n=723)	(n=667)	(n=677)	(n=1,968)	(n=1,134)	(n=1,431)
NET: YES	39%	44%	41%	33%	29%	47%	44%	31%
Yes - Often	6%	9%	6%	3%	3%	9%	9%	3%
Yes - Once or twice	33%	35%	35%	30%	26%	37%	35%	28%
No	58%	53%	55%	65%	68%	50%	54%	66%
Don't recall	3%	3%	4%	2%	3%	3%	3%	3%

□ Significantly higher ○ Significantly lower

Base: Has a family doctor

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## >> Reasons for No Family Doctor Consultation

*"And why were you unable to consult with your regular family doctor(s) in these situations?"*



Base: Was unable to consult with regular family doctor (n=1,590)

## >> Family Doctor Consultation Alternatives

*"And in a situation where you are not able to see your regular family doctor about a health issue you are having, what do you typically do?"*



MULTIPLE MENTIONS | Base: Was unable to consult with regular family doctor (n=1,590)

# >> Family Doctor Consultation Alternatives

## By Age

*"And in a situation where you are not able to see your regular family doctor about a health issue you are having, what do you typically do?"*

	Total (n=1,590)	Age (Years)			
		<45 (n=874)	45-54 (n=293)	55-64 (n=224)	65+ (n=199)
Go to a walk-in clinic	42%	50%	27%	33%	34%
Treat the issue myself / search online / use OTCs	37%	40%	38%	33%	30%
Go to urgent care / emergency care	28%	27%	34%	23%	25%
Make appoint. with a different family doctor	28%	29%	24%	27%	29%
811 / Babylon / Maple	24%	33%	8%	15%	16%
Wait until doctor was available	6%	4%	9%	6%	5%
Pharmacist / Nurse practitioner	2%	1%	2%	3%	3%
Something else	2%	2%	2%	2%	1%
Don't recall	2%	2%	4%	2%	2%

□ Significantly higher

○ Significantly lower

MULTIPLE MENTIONS | Base: Was unable to consult with regular family doctor

# >> Family Doctor Consultation Alternatives

## By Chronic Condition

*"And in a situation where you are not able to see your regular family doctor about a health issue you are having, what do you typically do?"*

	Chronic Condition			
	Total	Self	Other	No
	(n=1,590)	(n=918)	(n=496)	(n=444)
Go to a walk-in clinic	42%	41%	46%	36%
Treat the issue myself / search online / use OTCs	37%	40%	44%	30%
Go to urgent care / emergency care	28%	30%	36%	21%
Make appoint. with a different family doctor	28%	27%	22%	35%
811 / Babylon / Maple	24%	23%	29%	24%
Wait until doctor was available	6%	6%	4%	6%
Pharmacist / Nurse practitioner	2%	1%	3%	2%
Something else	2%	3%	3%	1%
Don't recall	2%	3%	1%	2%

□ Significantly higher

○ Significantly lower

MULTIPLE MENTIONS | Base: Was unable to consult with regular family doctor

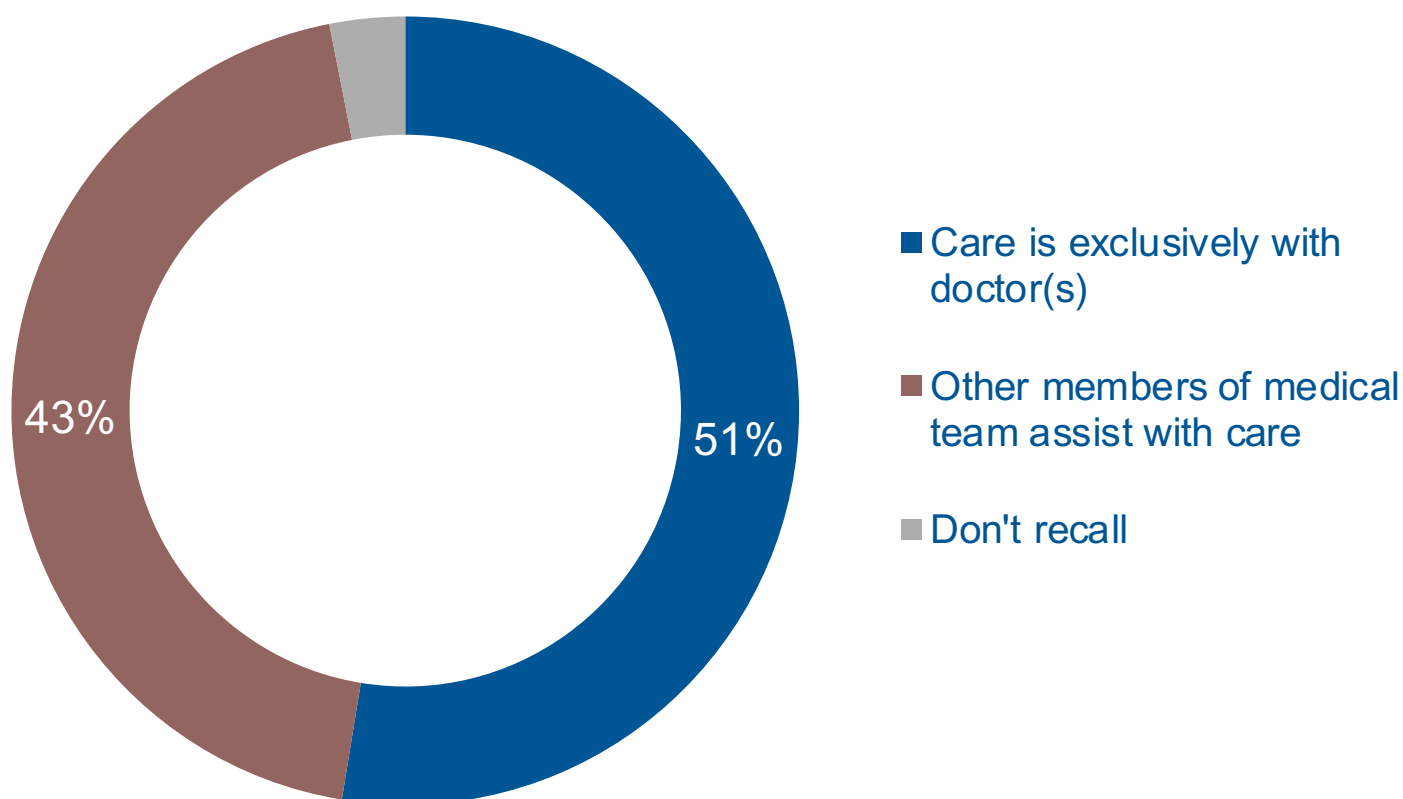
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## >> Doctor's Office Care

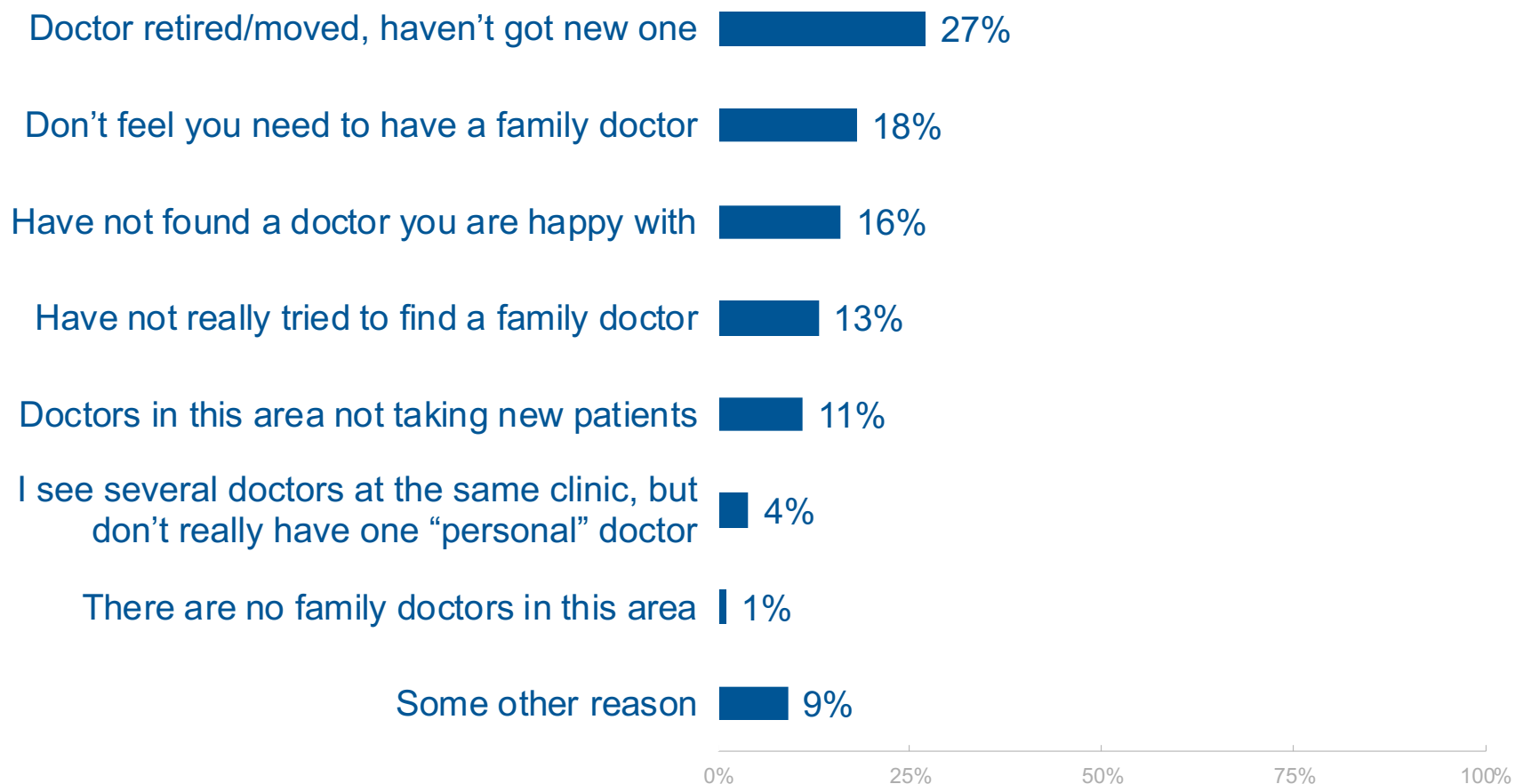
*“Thinking about the care you receive from your family doctor’s office, is your care handled exclusively by the doctor(s) or are there also connections to other members of the medical team at or associated with the clinic who assist directly with your care? (e.g. nurse, dietician, physiotherapist, visiting specialists like a rheumatologist, psychiatrist, etc.)?”*



MULTIPLE MENTIONS | Base: Has a family doctor (n=1,590)

## >> Reasons for Not Having a Family Doctor

*"What would you say is the main reason you do not currently have a personal family doctor?"*



Base: Does not have a family doctor (n=311)

# Patient Views on Virtual Care



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## >> Virtual Care in Alberta

Patients in Alberta are almost universally aware of both the concept of virtual care and its availability in the province – only 4% have never heard the term “Virtual Care” before, and only 7% were not aware it is available in Alberta. Indeed, a majority of those interviewed (51%) have actually used virtual care for their own health care before.

Virtual consults in Alberta are generally by telephone (95%), though 15% have used video conference and 10% used messaging portals to consult with their physicians.

**Satisfaction with virtual care is very high – fully 92% who have used VC before say they were satisfied with the experience (57% very satisfied) vs. only 7% who were not.**

Nearly three-quarters (73%) of albertapathients say they are likely to use virtual care in the future (for appropriate situations), with telephone and video conferencing the most appealing options.

- Virtual care intentions increase slightly with age, are higher among women than men, and are more appealing for those managing chronic conditions (either for themselves or someone in their household)

Continued ...  
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## Virtual Care in Alberta

... Continued

Patients see a great appeal in virtual care for situations that currently limit their access to their family doctor, such as those living in or traveling in remote areas of the province (86% appealing), outside of regular clinic hours (86%) and if their physician is not able to accommodate in-person appointments.

While appealing, patients don't see Virtual Care as a replacement for all in-person appointments, but definitely find it attractive for circumstances that wouldn't likely require physical examination of their condition. For example, for prescription refills, reviewing lab or diagnostic results, checkups after surgery or coordination of specialty care, and on-going management of chronic conditions.

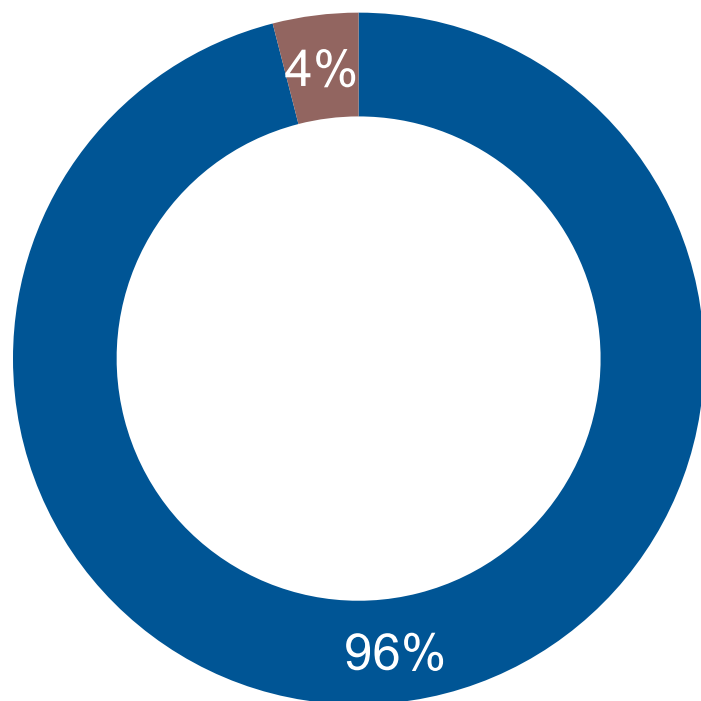
The ability to access virtual care could influence where a minority of patients seek their care. One-half (53%) of those currently without a family physician say they would consider registering with a family medical practice in order to access virtual care. Among those with a family doctor(s) one-quarter (25%) say they would be likely to consider switching practices if their current doctor does not provide virtual care.

Adapting virtual care may provide an opportunity for family practices to enhance the relationships with their patients, providing them with options attached to their "medical home" when they might otherwise seek care elsewhere. About two-thirds of patients say that if for some reason their own family doctor(s) was unavailable, it would be appealing to have a virtual consult with another member of their clinical team or another doctor from the same clinic.

## >> Awareness of “Virtual Care”

*"Before today, have you ever heard of the term “Virtual Care” before? That is, being able to consult with a physician by phone, video conference or a secure messaging portal rather than in person?"*

■ Yes ■ No



*"Virtual Care is something that is now available in Alberta through most physicians' offices, regardless of the type of medicine they practice. Before today, was this something you were aware of?"*

Yes, aware and have consulted with doctor using virtual care 51%

Yes, aware but have not used it yet 42%

No, wasn't aware this service was available 7%

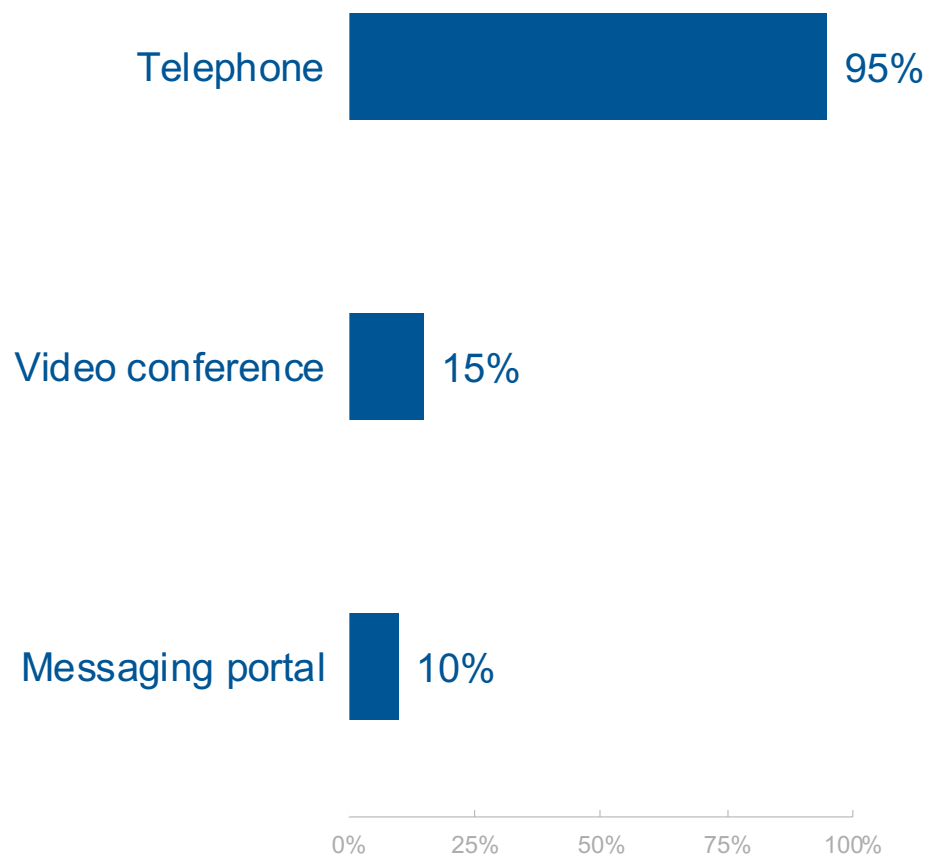


Base: All respondents (n=4,354)

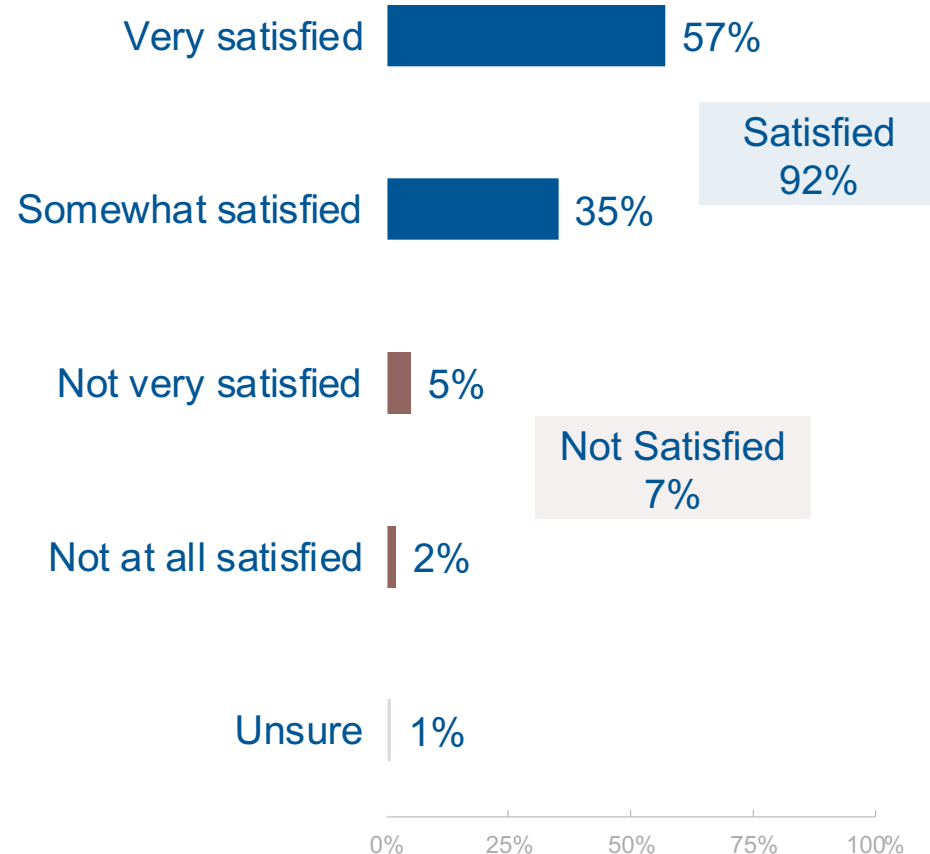
## >> “Virtual Care” Methods Used and Satisfaction

*"What method or methods did you use to communicate with your doctor using Virtual Care?"*

MULTIPLE MENTIONS



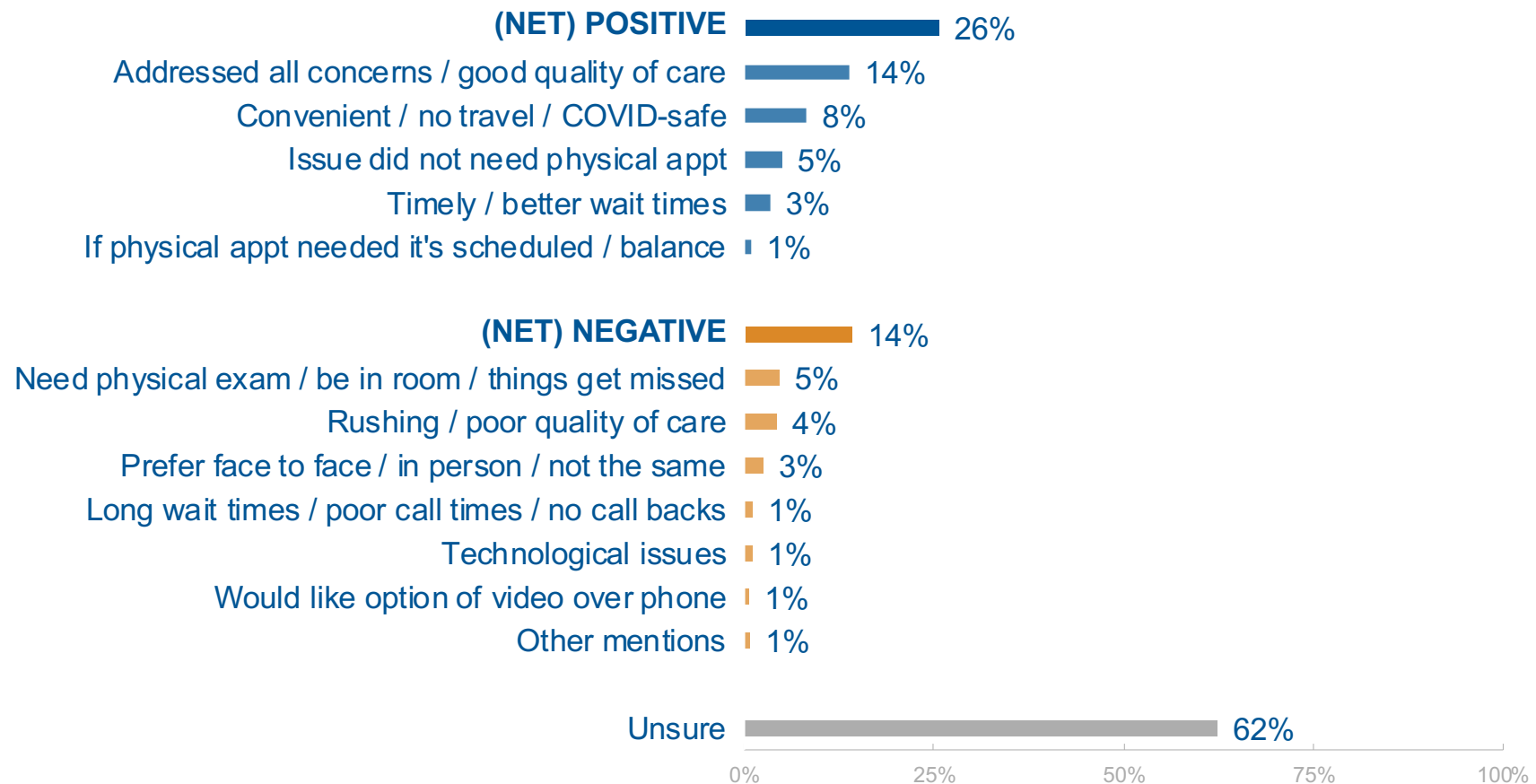
*"Generally speaking, how satisfied are you with the care you received from your doctor(s) using Virtual Care?"*



Base: Have used virtual care (n=2,238)

## >> Top-of-Mind Reasons for Satisfaction / Dissatisfaction with Virtual Care

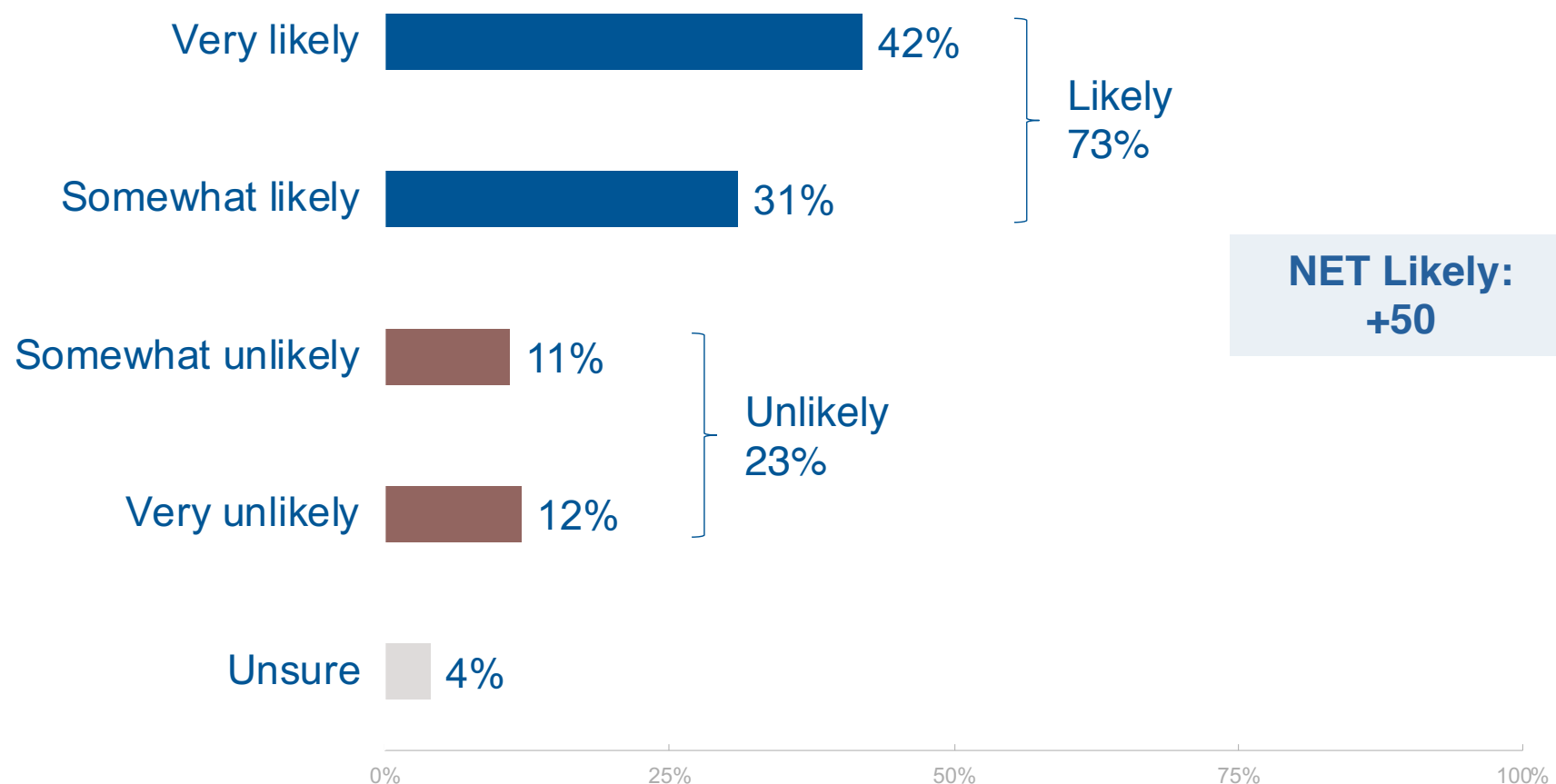
*"Why do you say you are satisfied / dissatisfied with the care you received from your doctor(s) using Virtual Care?"*



Base: Have used virtual care - voluntarily offered a comment  
Open-ended question: Comments were coded into common themes mentioned

## >> Likelihood to Use Virtual Care

*"As a patient how likely or unlikely are you to use Virtual Care when appropriate to consult with your doctor(s) in the future?"*



NET: Likely minus unlikely | Base: All respondents (n=4,354)



# Likelihood to Use Virtual Care

By Age and Gender

*"As a patient how likely or unlikely are you to use Virtual Care when appropriate to consult with your doctor(s) in the future?"*

■ Very likely ■ Somewhat likely ■ Unsure ■ Somewhat unlikely ■ Very unlikely

NET  
Likely



+50

## AGE



+47



+50



+54



+54

## GENDER



+42



+56

0% 25% 50% 75% 100%

NET: Likely minus unlikely | Base: All respondents



# Likelihood to Use Virtual Care

## By Region

"As a patient how likely or unlikely are you to use Virtual Care when appropriate to consult with your doctor(s) in the future?"

■ Very likely ■ Somewhat likely ■ Unsure ■ Somewhat unlikely ■ Very unlikely

NET  
Likely



### REGION



### CHRONIC COND.



0% 25% 50% 75% 100%

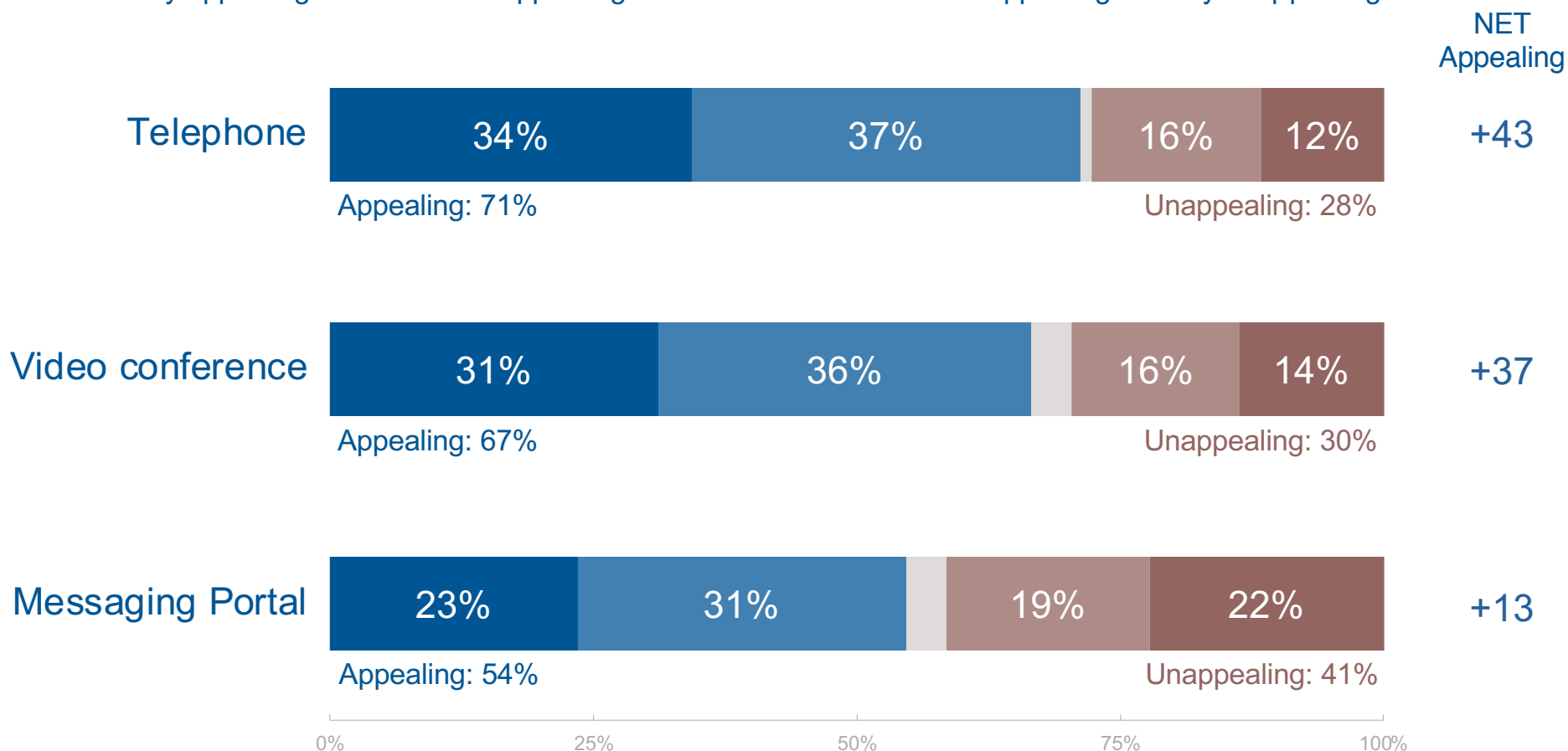
NET: Likely minus unlikely | Base: All respondents



## >> Appeal of Virtual Care Consultation Methods

*“Thinking about your own situation personally, how appealing or unappealing are each of the following methods for consulting with a doctor using Virtual Care?”*

■ Very appealing ■ Somewhat appealing ■ Unsure ■ Somewhat unappealing ■ Very unappealing



NET: Appealing minus unappealing | Base: All respondents (n=4,354)

## >> Appeal of Virtual Care Access in Varied Circumstances

*“Still thinking about virtual care for your family medical needs, how appealing or unappealing would it be to you as a patient to be able to access care in the following circumstances?”*

■ Very appealing ■ Somewhat appealing ■ Unsure ■ Somewhat unappealing ■ Very unappealing

If you live in or were travelling in a remote area of the province



NET  
Appealing

+78

Outside of regular clinic hours (e.g. weekends, evenings, etc.)



+75

If no “in person” appointments available to meet your needs



+62

0% 25% 50% 75% 100%

NET: Appealing minus unappealing | Base: All respondents (n=4,354)



# Appeal of Virtual Care Access in Varied Circumstances

By Region

*“Still thinking about virtual care for your family medical needs, how appealing or unappealing would it be to you as a patient to be able to access care in the following circumstances?”*

		Region					
		TOTAL (n=4,354)	CGY (n=1,520)	EDM (n=1,374)	North (n=525)	Central (n=487)	South (n=448)
If you live in or were travelling in a remote area of the province	<b>Appealing</b>	<b>86%</b>	<b>88%</b>	<b>87%</b>	<b>78%</b>	<b>89%</b>	<b>85%</b>
	Unappealing	8%	5%	8%	21%	8%	10%
	Unsure	6%	7%	6%	1%	3%	5%
Outside of regular clinic hours (weekends, evenings)	<b>Appealing</b>	<b>86%</b>	<b>88%</b>	<b>86%</b>	<b>80%</b>	<b>87%</b>	<b>85%</b>
	Unappealing	11%	8%	11%	18%	10%	10%
	Unsure	3%	3%	3%	2%	3%	5%
If no “in person” appoint’s available to meet your needs	<b>Appealing</b>	<b>80%</b>	<b>80%</b>	<b>82%</b>	<b>73%</b>	<b>81%</b>	<b>83%</b>
	Unappealing	18%	18%	16%	26%	15%	15%
	Unsure	2%	2%	2%	2%	3%	2%



Significantly higher



Significantly lower

Base: All respondents



# Appeal of Virtual Care Access in Varied Circumstances

By Age

*“Still thinking about virtual care for your family medical needs, how appealing or unappealing would it be to you as a patient to be able to access care in the following circumstances?”*

		TOTAL (n=4,354)	Age (Years)			
			<45 (n=2,207)	45-54 (n=766)	55-64 (n=693)	65+ (n=688)
If you live in or were travelling in a remote area of the province	<b>Appealing</b>	<b>86%</b>	88%	86%	85%	82%
	Unappealing	8%	8%	10%	10%	9%
	Unsure	6%	4%	4%	5%	9%
Outside of regular clinic hours (weekends, evenings)	<b>Appealing</b>	<b>86%</b>	89%	84%	82%	82%
	Unappealing	11%	9%	11%	13%	12%
	Unsure	3%	1%	5%	5%	5%
If no “in person” appoint’s available to meet your needs	<b>Appealing</b>	<b>80%</b>	83%	76%	77%	77%
	Unappealing	18%	16%	19%	20%	20%
	Unsure	2%	1%	5%	3%	3%



Significantly higher



Significantly lower

Base: All respondents

# >> Appeal of Virtual Care Access in Varied Circumstances

## By Gender and Chronic Condition

*“Still thinking about virtual care for your family medical needs, how appealing or unappealing would it be to you as a patient to be able to access care in the following circumstances?”*

		TOTAL (n=4,354)	Gender		Chronic Condition		
			Male (n=2,170)	Female (n=2,184)	Self (n=2,046)	Other (n=1,234)	None (n=1,586)
If you live in or were travelling in a remote area of the province	<b>Appealing</b>	<b>86%</b>	<b>85%</b>	<b>87%</b>	85%	88%	86%
	Unappealing	8%	11%	6%	9%	6%	10%
	Unsure	6%	4%	6%	6%	5%	4%
Outside of regular clinic hours (weekends, evenings)	<b>Appealing</b>	<b>86%</b>	<b>85%</b>	<b>87%</b>	87%	88%	84%
	Unappealing	11%	12%	9%	10%	10%	13%
	Unsure	3%	3%	4%	4%	2%	3%
If no “in person” appoint’s available to meet your needs	<b>Appealing</b>	<b>80%</b>	77%	83%	79%	83%	79%
	Unappealing	18%	21%	15%	18%	15%	19%
	Unsure	2%	2%	2%	3%	2%	2%

□ Significantly higher ○ Significantly lower

Base: All respondents

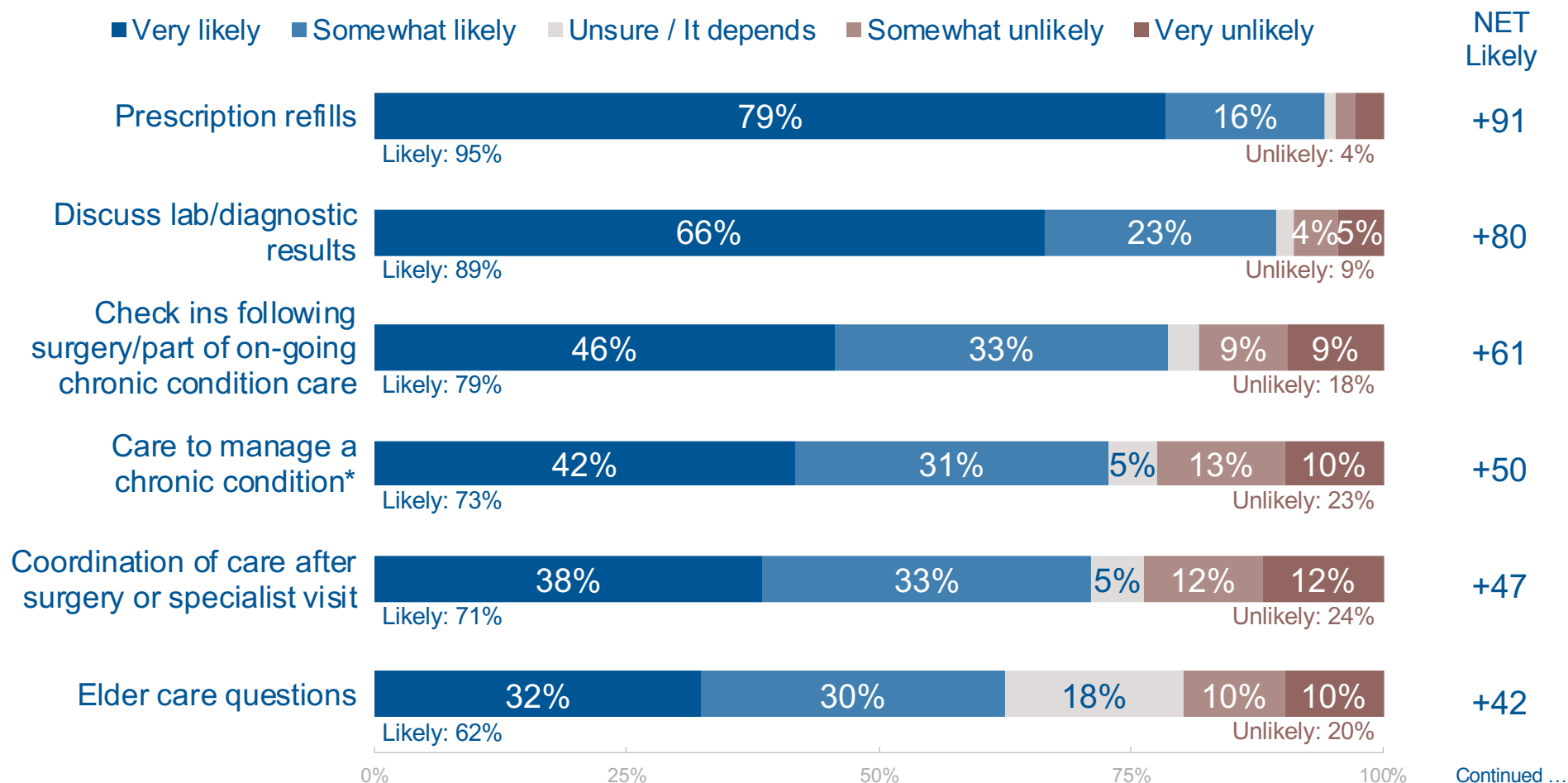
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## >> Likelihood to Use Virtual Care for Varied Needs

*“The following are a list of some of the more common reasons why people book appointments with their family doctor. Thinking about yourself personally, how likely or unlikely would you be to want to use a virtual consultation with your doctor for this if you needed to?”*



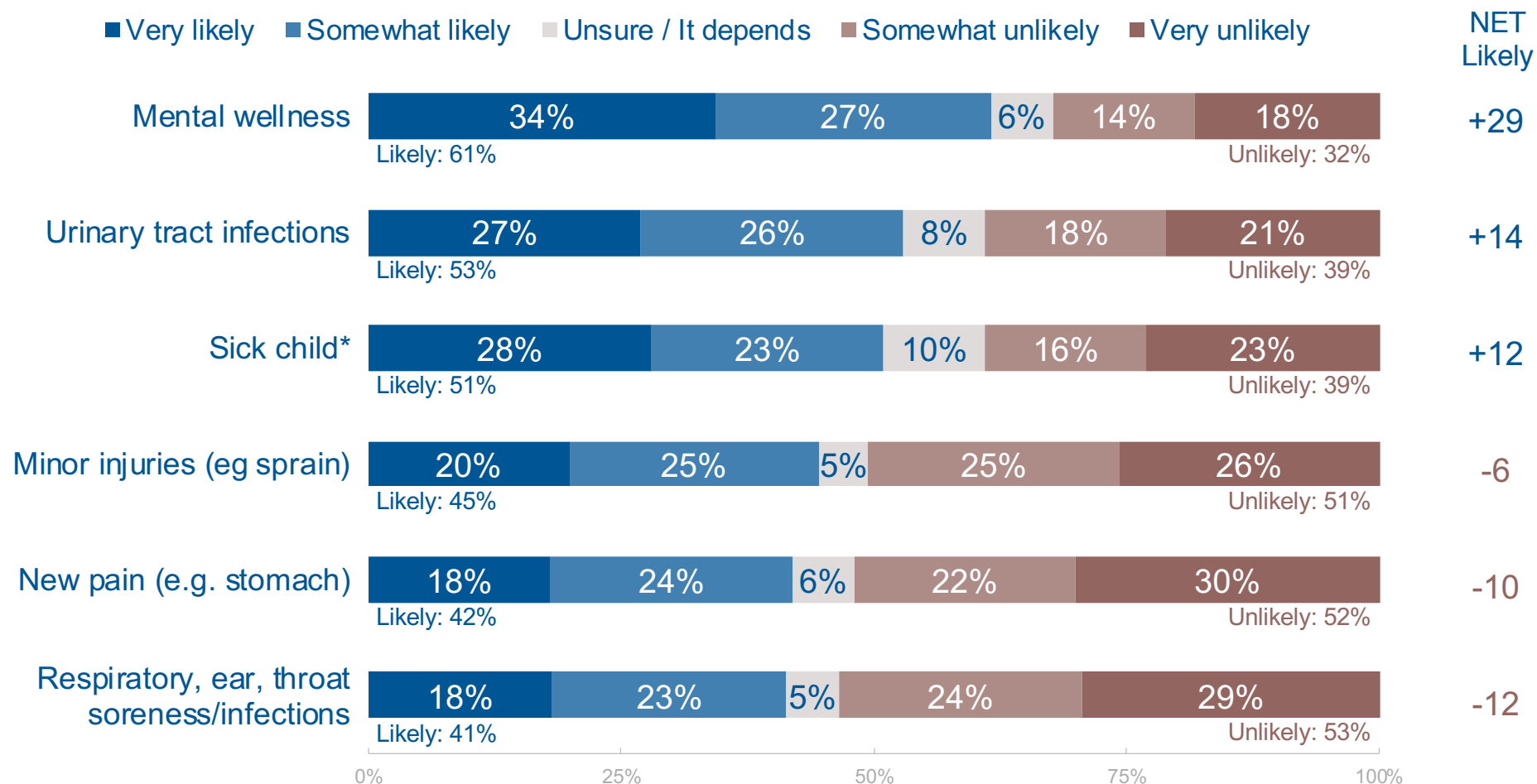
\*Base: Has a chronic condition (n=2,046)

NET: Likely minus unlikely | Base: All respondents (n=4,354)

## >> Likelihood to Use Virtual Care for Varied Needs

... continued

*“The following are a list of some of the more common reasons why people book appointments with their family doctor. Thinking about yourself personally, how likely or unlikely would you be to want to use a virtual consultation with your doctor for this if you needed to?”*



\*Base: Has kids at home (n=1,418)

NET: Likely minus unlikely | Base: All respondents (n=4,354)

## >> Top-of-mind Concerns with Virtual Care

*"Do you have any concerns or questions about using Virtual Care to consult with your doctor(s)?"*



Base: All respondents - voluntarily offered a comment  
Open-ended question: Comments were coded into common themes mentioned

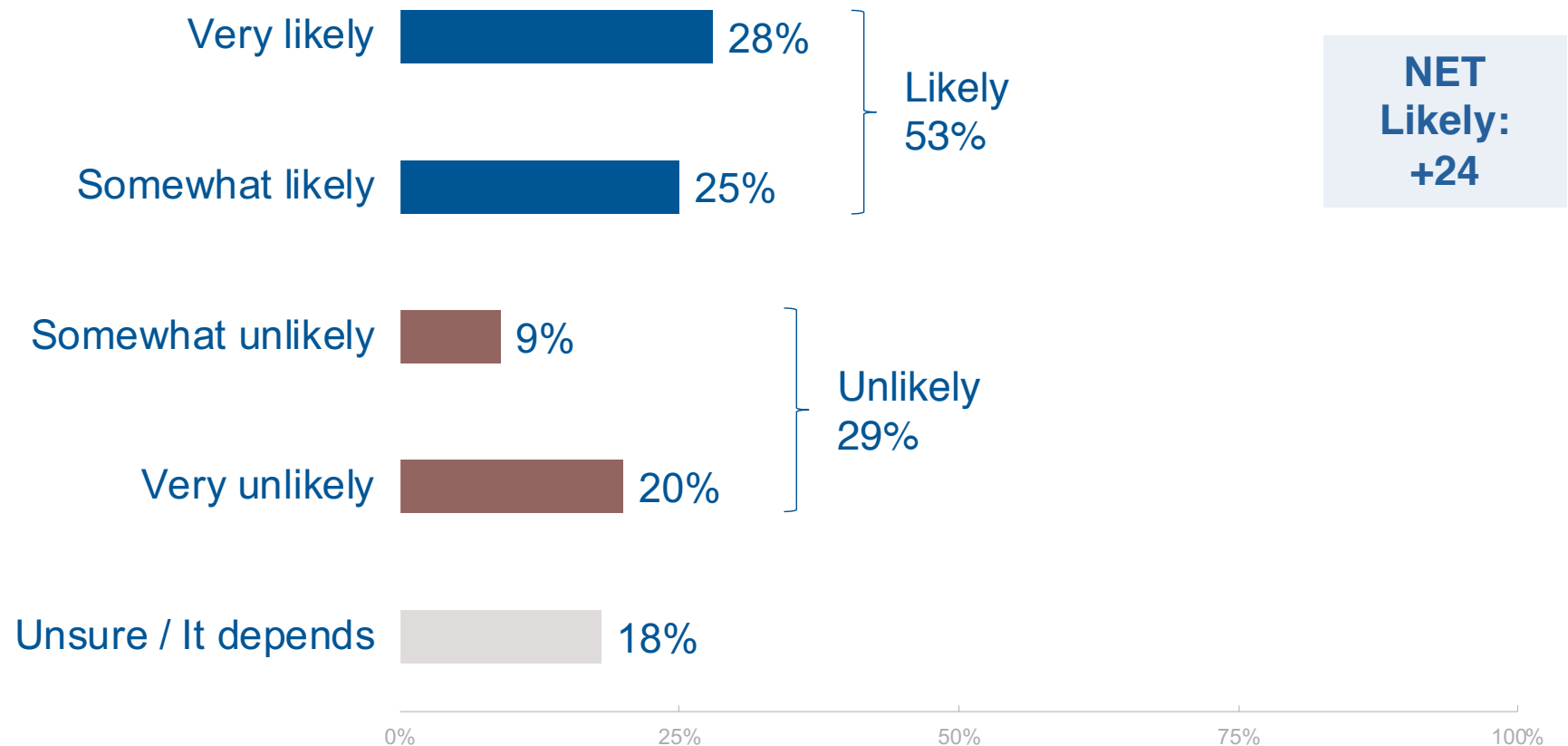




## Likelihood to Register with Clinic to Access Virtual Care

From those who do not have a family doctor

*"You mentioned earlier that you currently do not have a family doctor. How likely or unlikely are you personally to consider registering with a family medical practice if it allowed you to access virtual care for your needs?"*



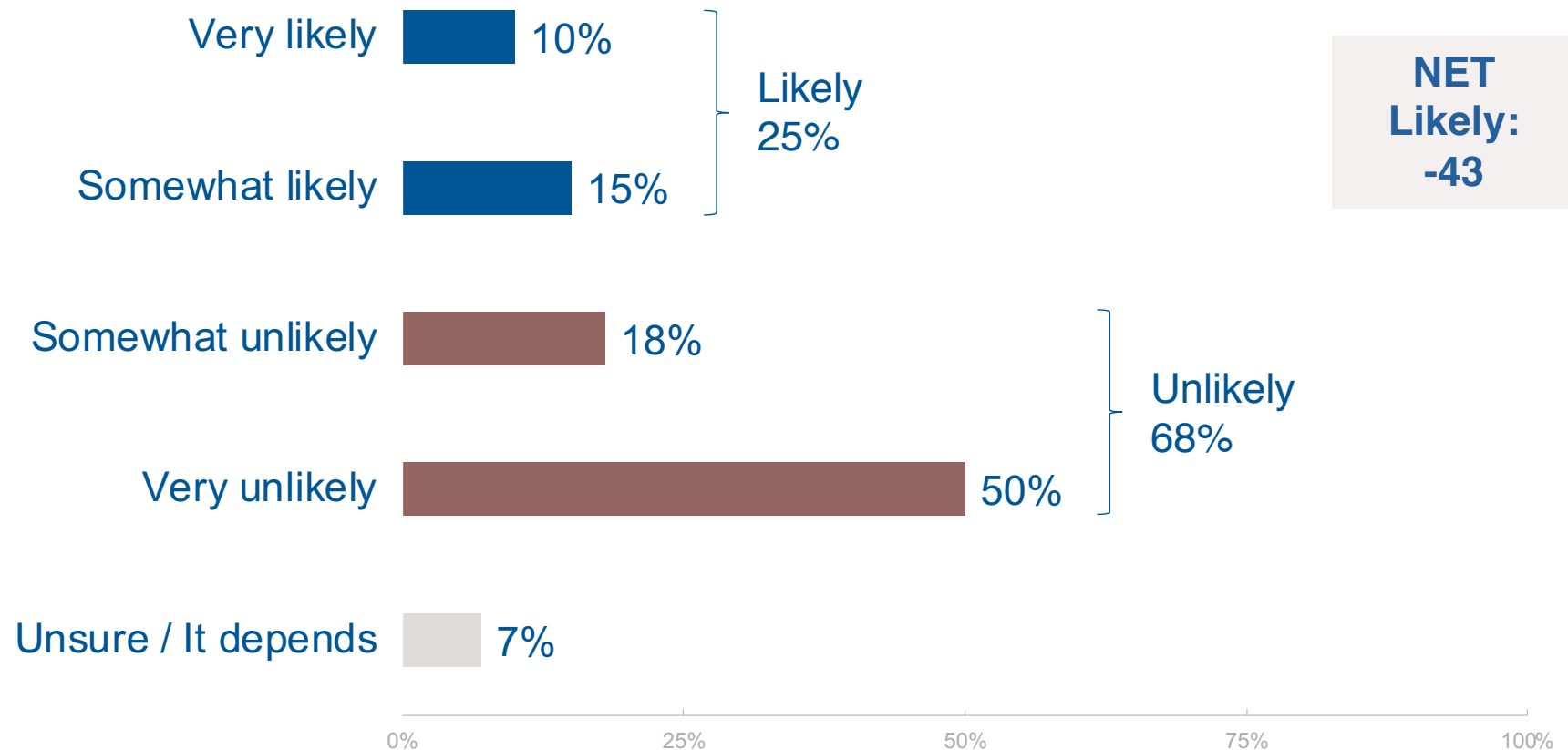
NET: Likely minus unlikely | Base: Does not have a family doctor (n=311)



## Likelihood to Switch Doctors to Access Virtual Care

From those who have a family doctor

*"Not all family doctors in Alberta currently offer virtual care for patients. Thinking about your own situation, how likely or unlikely would you personally be to consider switching to a new family doctor if yours doesn't offer virtual care?"*



NET: Likely minus unlikely | Base: Has a family doctor (n=4,043)

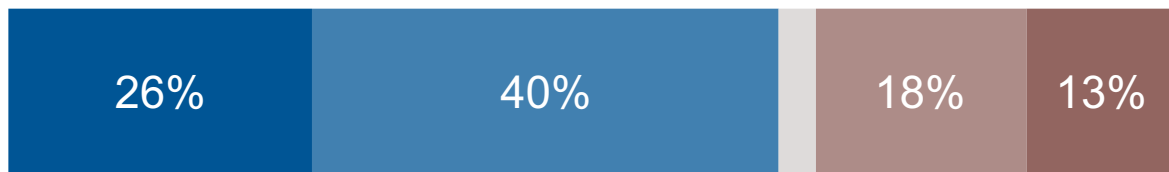
## >> Appeal of Virtual Care Appointment Options

*“And if for some reason you were unable to speak to your own family doctor(s) about a concern (e.g. they were fully booked with appointments, the issue happened on weekends/evenings/after hours, etc.), how appealing or unappealing would the following options be to you?”*

■ Very appealing ■ Somewhat appealing ■ Unsure ■ Somewhat unappealing ■ Very unappealing

NET  
Appealing

A virtual care appointment with another member of the medical team (e.g. a nurse) at your doctor's clinic

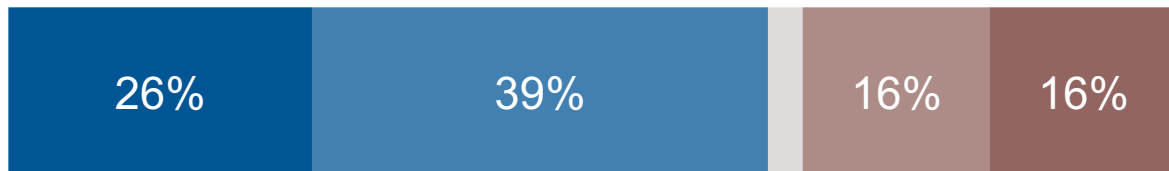


Appealing: 66%

Unappealing: 31%

+35

A virtual care appointment with another doctor (who you don't normally see) from the same clinic



Appealing: 65%

Unappealing: 32%

+33

0% 25% 50% 75% 100%

NET: Appealing minus unappealing | Base: Has a family doctor (n=4,043)

# Patient Views on Associated Virtual Medical Clinics



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## >> Associated Virtual Medical Clinics (AVMC)

There are a growing number of entities beginning to occupy the pure “virtual clinic” space in Canada, with services like Babylon, Maple, Tia Health and Well Health.

These services are somewhat less well known to patients than virtual care offered by their own physician(s), and considerably less appealing. Just under three-in-ten (28%) patients have never heard of this sort of purely virtual clinic services, while 48% are very familiar with them.

However only 29% of patients say they would be personally likely to try such a service (9% very likely), while six-in-ten (59%) would not (42% very unlikely).

- Patients expressing a willingness to use AVMCs tend to highlight convenience and speed as a driver
- For those unlikely to use an AVMC, a desire for continuity in care and preference for an existing relationship with their physician are most commonly cited, along with issues such as not supporting “privatized” medicine, privacy and confidentiality, etc.

Only 4% of those interviewed say they have already used an AVMC before, with half each saying they would or would not do so again (and roughly equal proportions reporting satisfactory and unsatisfactory experiences).

## >> Concerns About AVMCs

As they currently operate, there are a number of limitations to AVMCs (many of which patients are unlikely to be aware of), which significantly hinder appeal of these services among patients.

The inability of AVMC physicians to access private medical records (either to review a patients' history or to update them following a consult) is a significant concern for patients, but at the same time a high proportion are uncomfortable with a private company retaining information about their personal medical history. Other issues of considerable concern relate to the continuity of care for patients such as the inability for follow up consults or getting a different physician every time they call.

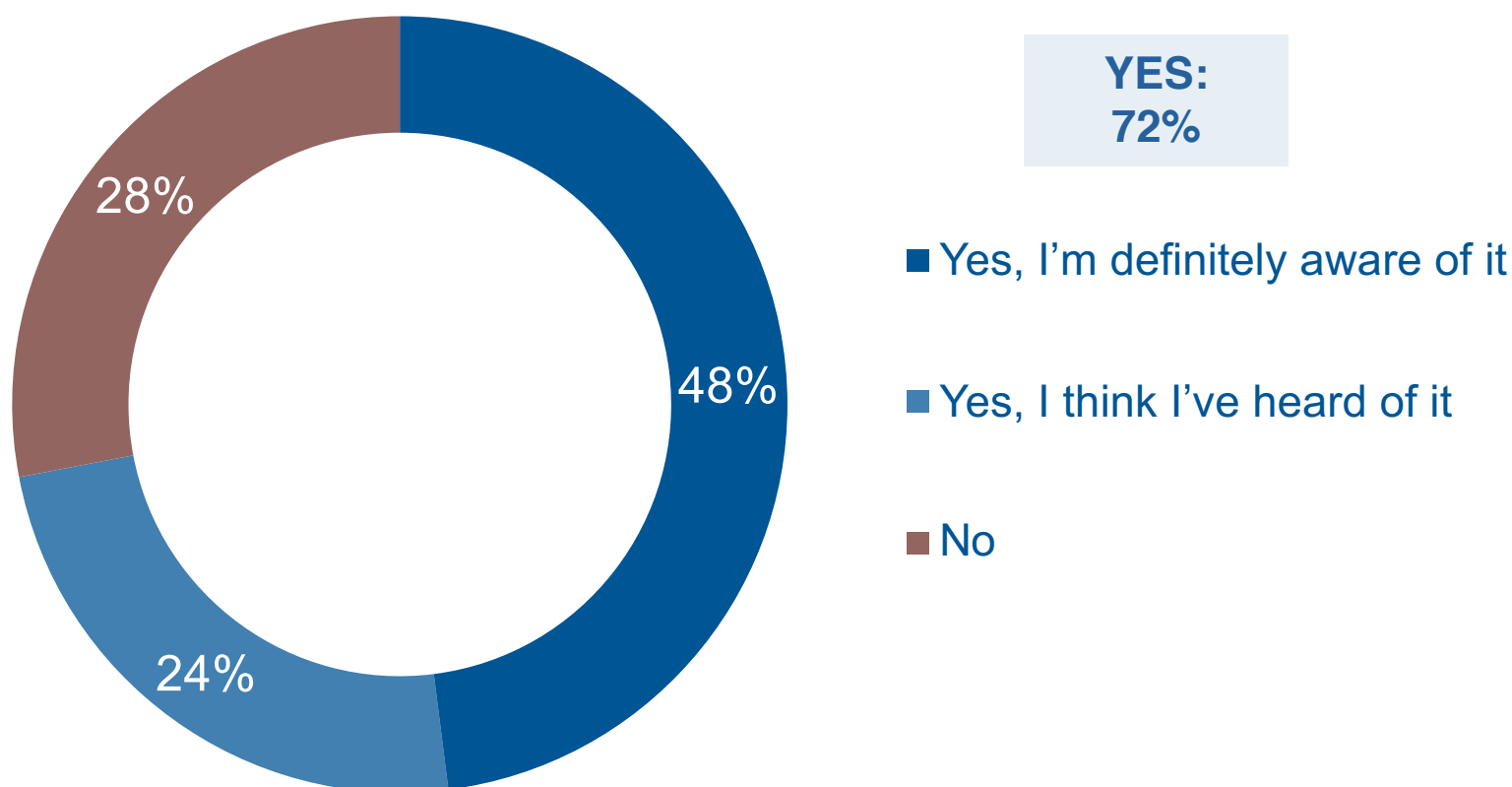
After evaluating some of the limitations of AVMCs, patients were again asked their likelihood of using such a service in the future, with intentions down notably from their initial responses. Just over one-in-five (21%) say they are at all likely to use an AVMC (6% very likely), down from 29% initially.

- AVMC intentions are slightly higher among those under the age of 55, and among men

The vast majority of patients would prefer to access care virtually through their medical home (even if their own doctor isn't available) than through an AVMC.

## >> Awareness of AVMC's

*"Before today have you ever heard of medical care being offered to people which is strictly virtual, that is they don't have any "bricks and mortar" medical clinics? Examples of these would be services like Babylon by TELUS, Maple by Shopper's Drug Mart, Tia Health or Well Health Virtual Clinic?"*

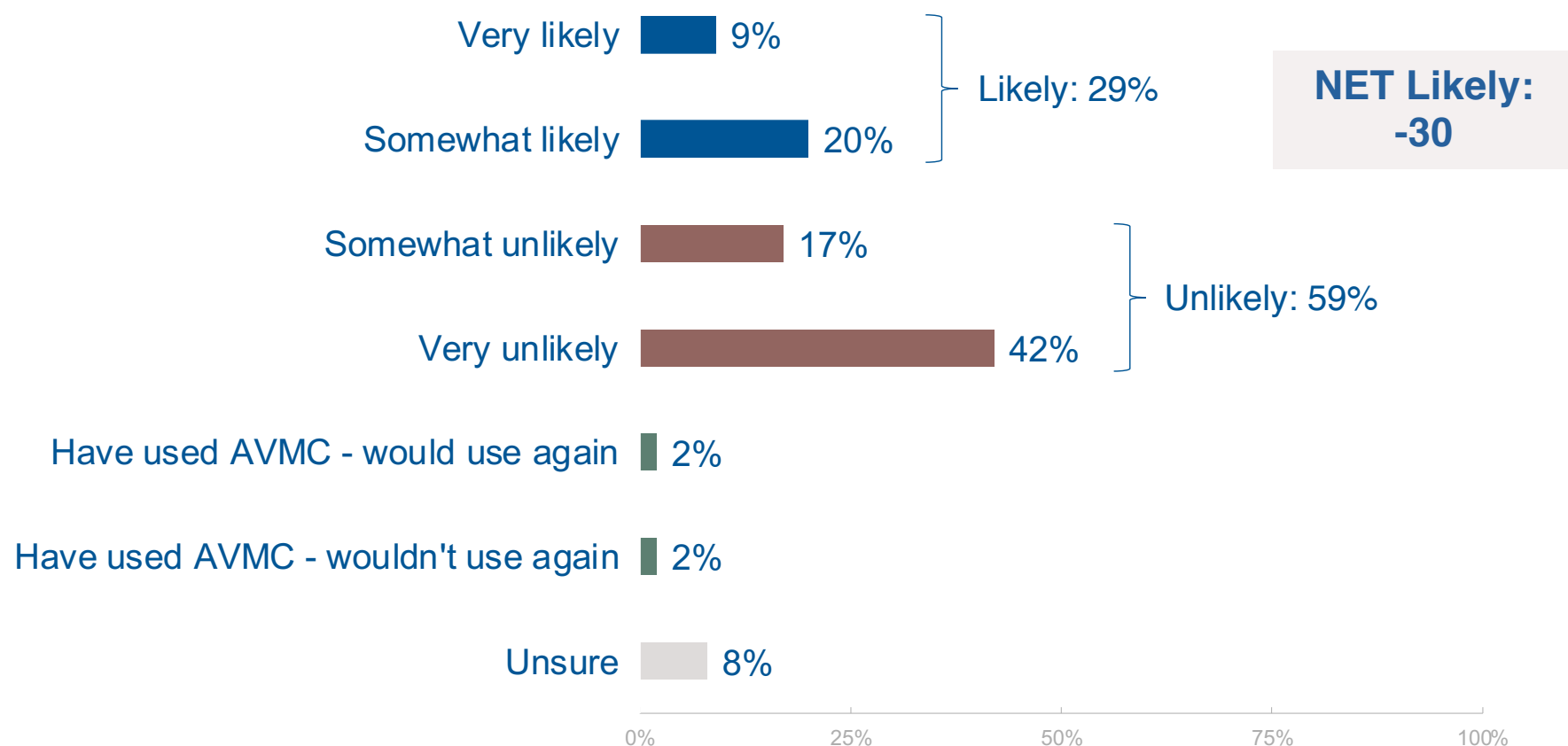


Base: All respondents (n=4,354)

## >> Likelihood to Use AVMC

*"Associated virtual medical clinics (AVMCs) like Babylon, Maple, Tia Health and Well Health allow people to connect (via telephone, app or web portal) with Canadian licensed doctors (and other health care providers like dietitians or mental health counsellors) for on-demand virtual appointments. The doctors with these services are able to provide medical advice and write prescriptions for treatment."*

**"As a patient, how likely or unlikely would you personally be to use an AVMC in the future?"**



Base: All respondents (n=4,354)

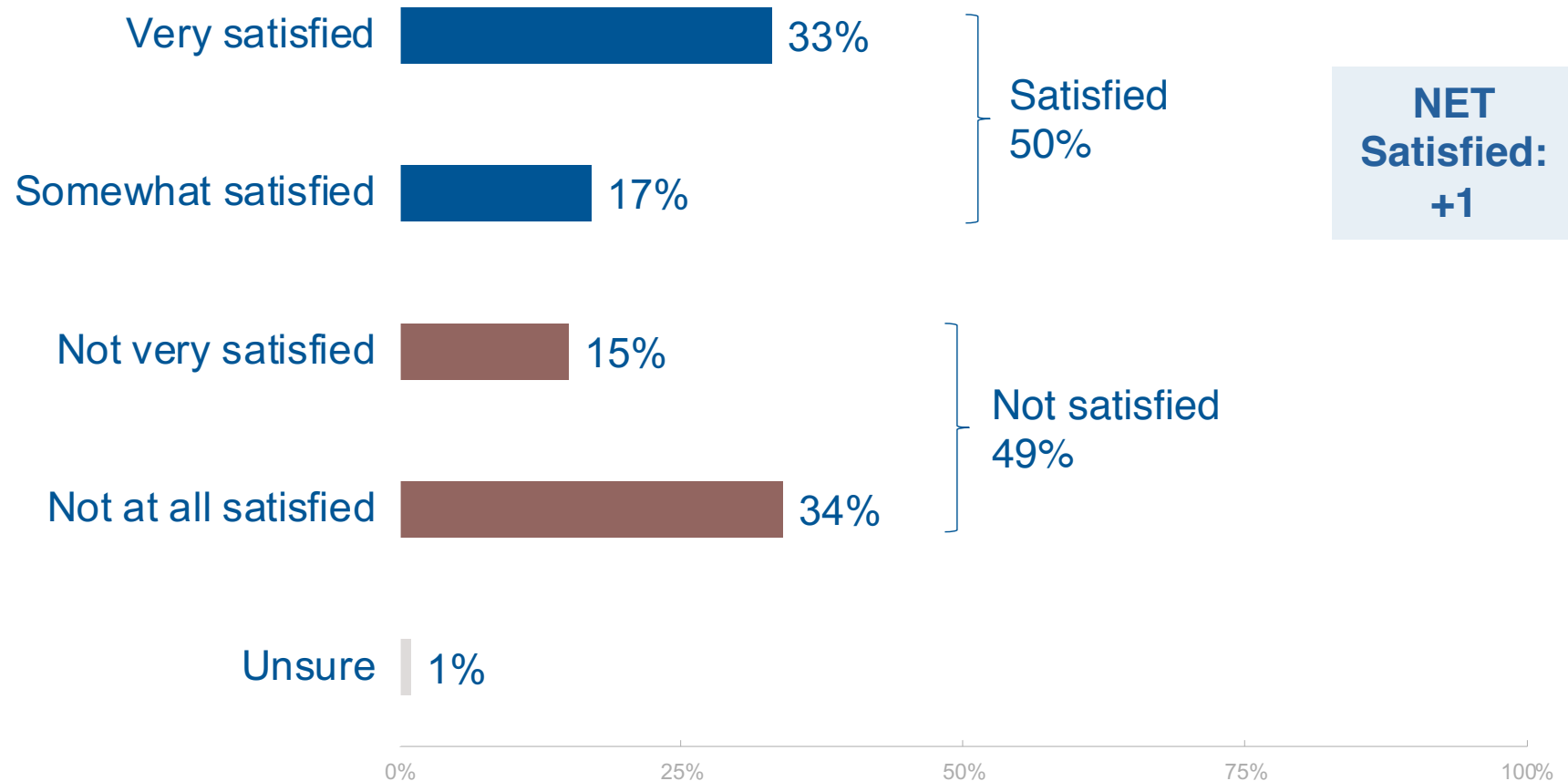




## Satisfaction with AVMC's

From those Likely to Use AVMC / Would Use Again

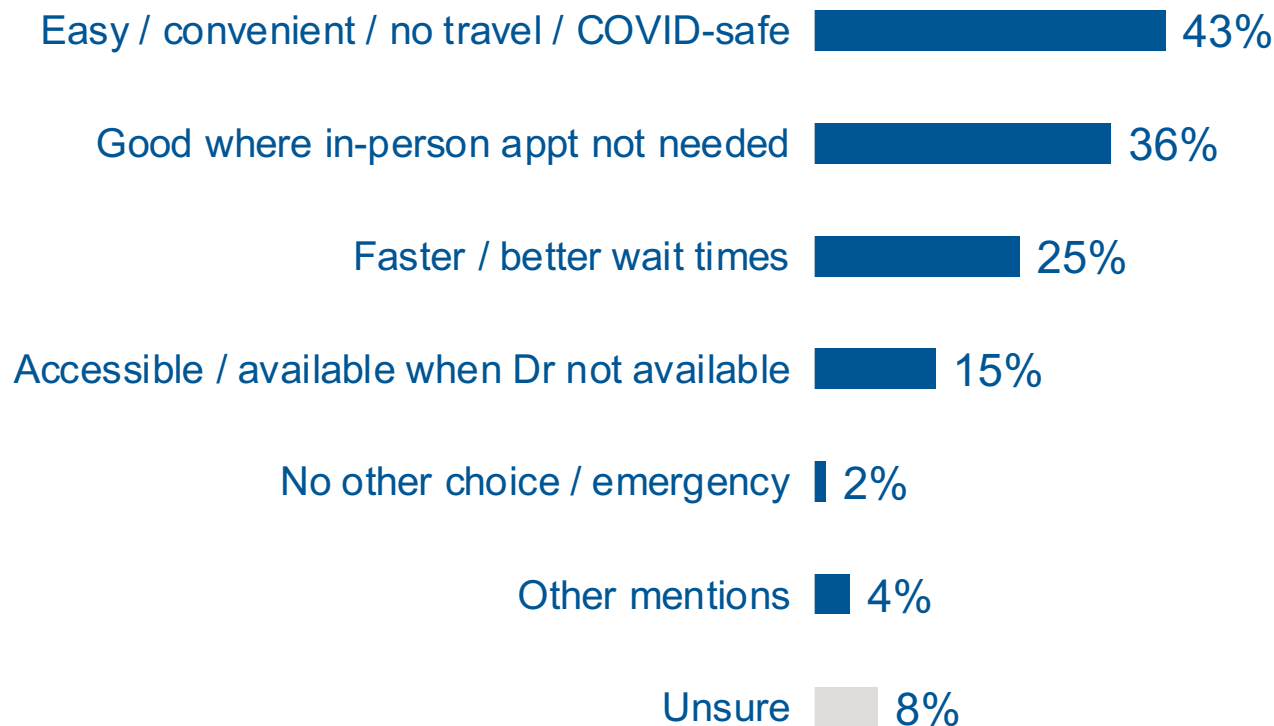
*"Generally speaking, how satisfied were you with the care you have received from these services?"*



NET: Satisfied minus not satisfied | Base: Likely to use AVMC / Would use again (n=165)

## >> Top-of-mind Appeal and Reasons to Use AVMC

*"You mentioned that you are likely to use or have used this sort of AVMC service. Why do you say that? What is appealing about it or what sorts of things would you/did you use it for?"*

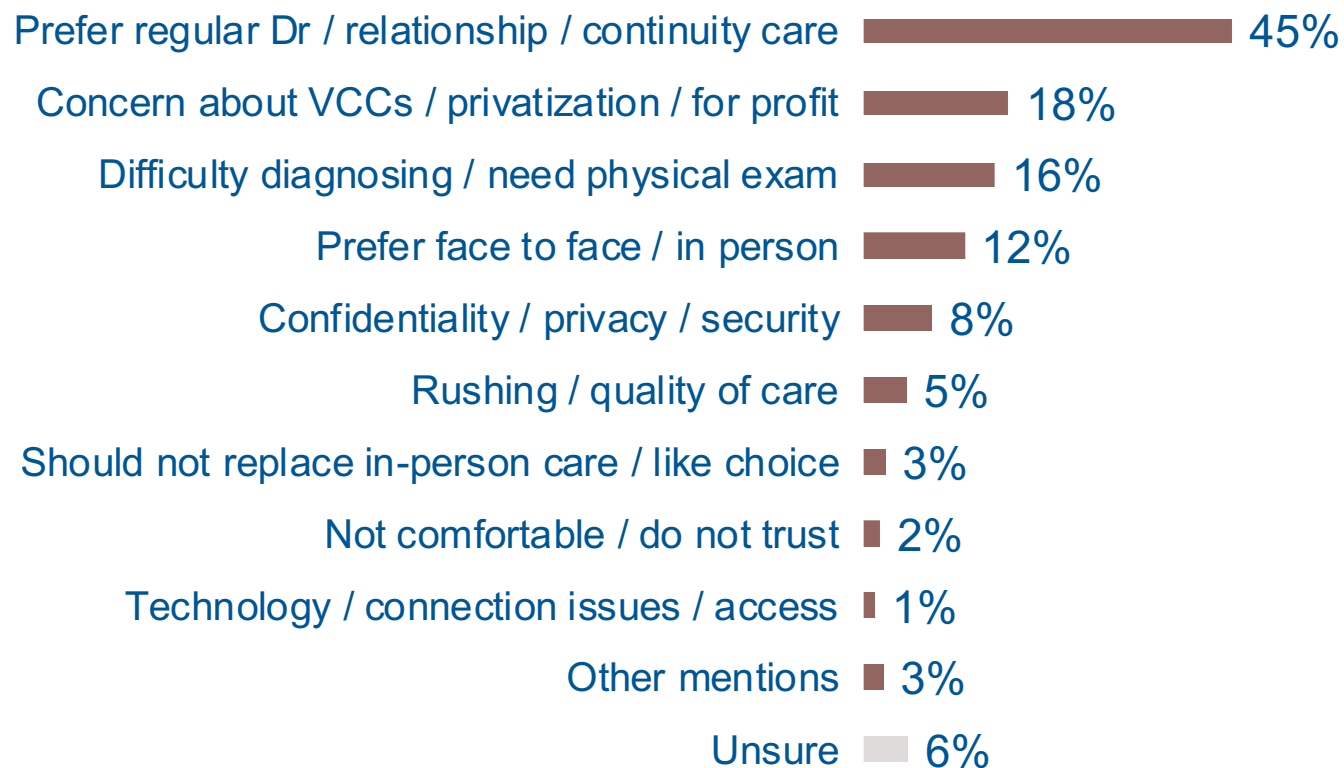


31% say they are likely to use an AVMC, or have used and would use again

Base: Likely to use AVMC / Would use again - voluntarily offered a comment  
Open-ended question: Comments were coded into common themes mentioned

## >> Top-of-mind Reasons to Not Use AVMC

*"You mentioned that you are unlikely to use an AVMC service or would never use one again. Why do you say that?"*

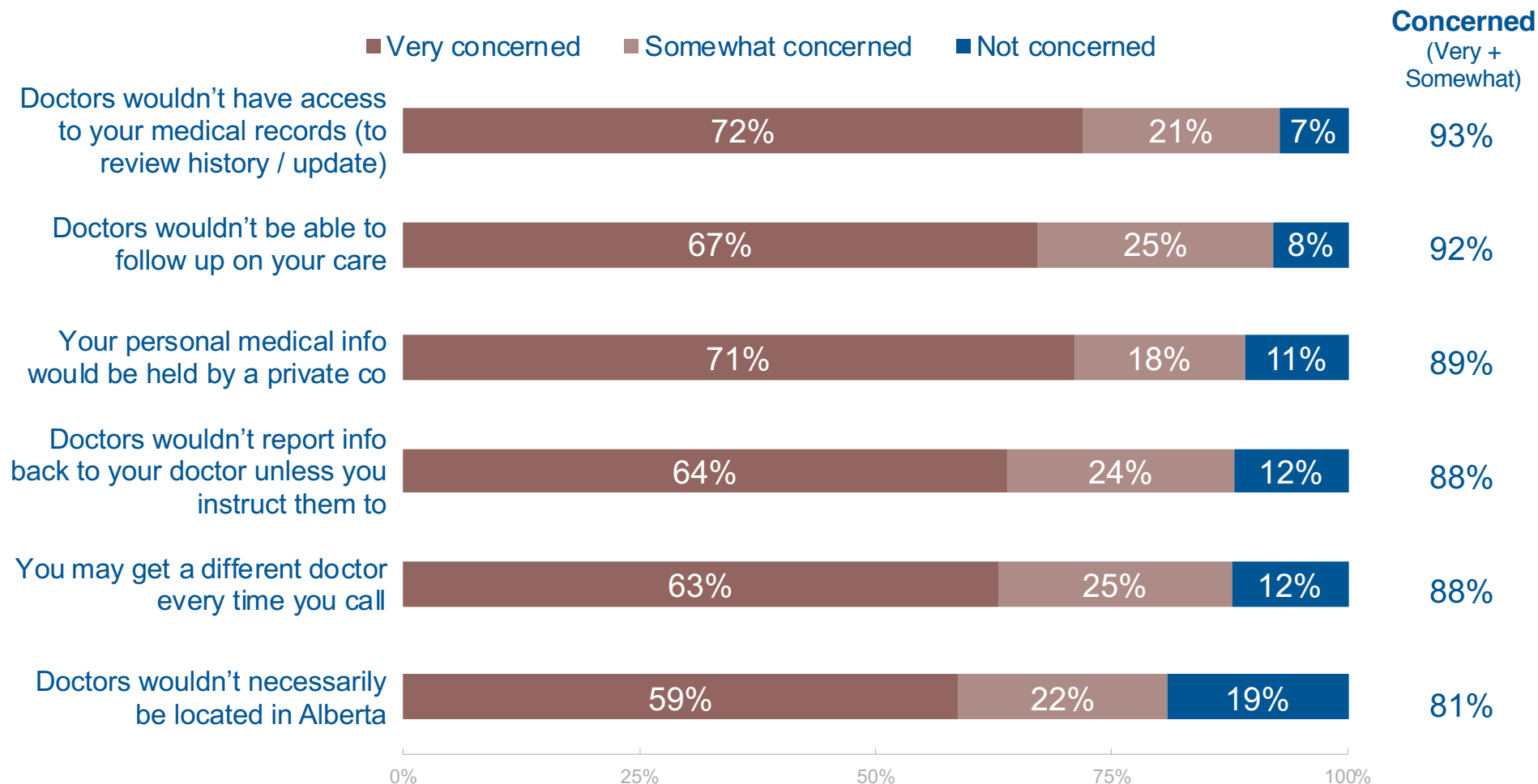


61% say they are unlikely to use an AVMC, or have used and would not use again

Base: Unlikely to use AVMC / Wouldn't use again - voluntarily offered a comment  
Open-ended question: Comments were coded into common themes mentioned

## >> Concerns with AVMC Services vs. Regular Doctor VC

*“Using AVMC services is a little different than the virtual care you would receive from your regular doctor(s). As a patient, to what degree, if any, would you have concerns about some of these differences?”*



Base: All respondents (n=4,354)



# Concerns with AVMC Services vs. Regular Doctor VC

By Age

*“Using AVMC services is a little different than the virtual care you would receive from your regular doctor(s). As a patient, to what degree, if any, would you have concerns about some of these differences?”*

Total “Concerned” (Very + Somewhat)	Total (n=4,354)	Age (Years)			
		<45 (n=2,207)	45-54 (n=766)	55-64 (n=693)	65+ (n=688)
Doctors wouldn’t have access to your medical records (to review history / update)	93%	92%	91%	94%	96%
Doctors wouldn’t be able to follow up on your care	92%	90%	93%	94%	97%
Personal medical info would be held by a private co	89%	85%	92%	94%	93%
Doctors wouldn’t report info back to your doctor unless you instruct them to	88%	85%	88%	90%	94%
You may get a different doctor every time you call	88%	85%	88%	91%	93%
Doctors wouldn’t necessarily be located in Alberta	81%	76%	81%	87%	91%

☐ Significantly higher

☐ Significantly lower

Base: All respondents

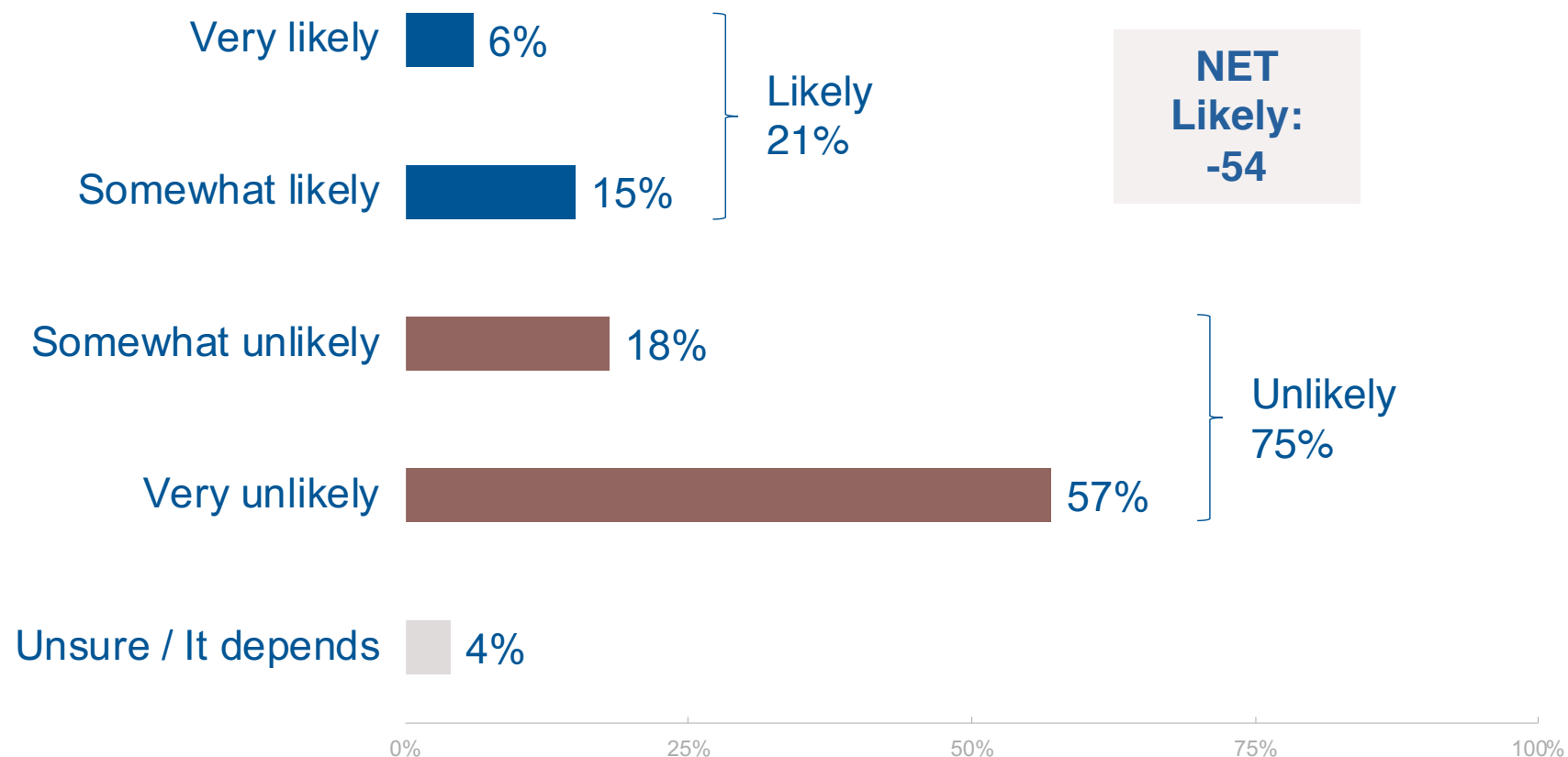
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## >> Likelihood to use AVMC

*"Now knowing some of the differences in virtual care offered by a family doctor and those offered by AVMCs, as a patient, how likely or unlikely would you personally be to use an AVMC in the future?"*



NET: Likely minus unlikely | Base: All respondents (n=4,354)



# Likelihood to use AVMC

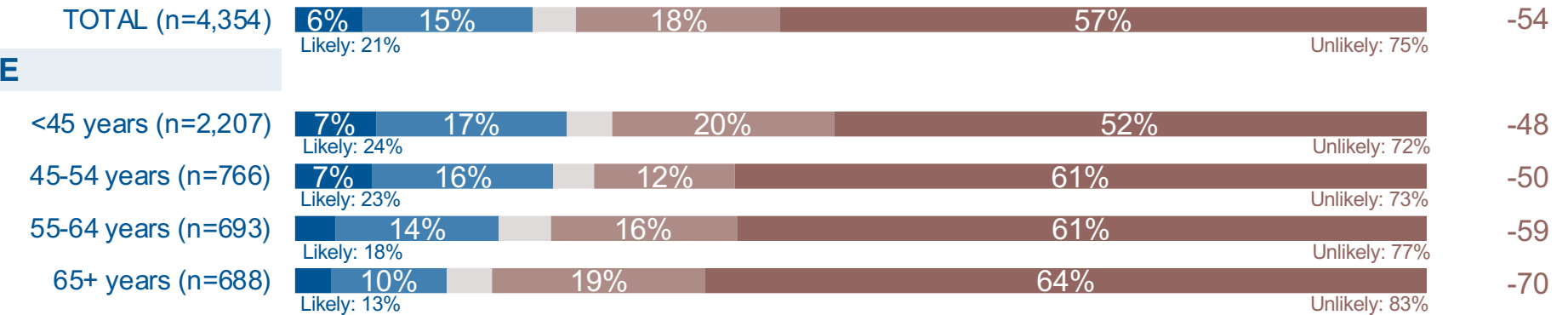
## By Age, Gender and Chronic Condition

*"Now knowing some of the differences in virtual care offered by a family doctor and those offered by AVMCs, as a patient, how likely or unlikely would you personally be to use an AVMC in the future?"*

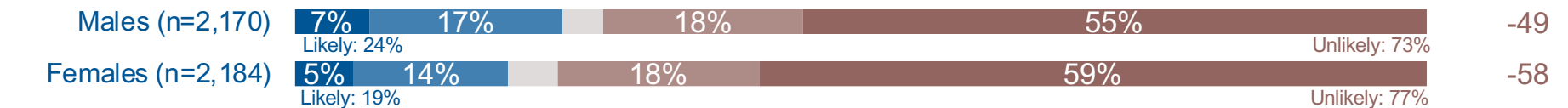
■ Very likely ■ Somewhat likely ■ Unsure ■ Somewhat unlikely ■ Very unlikely

NET  
Likely

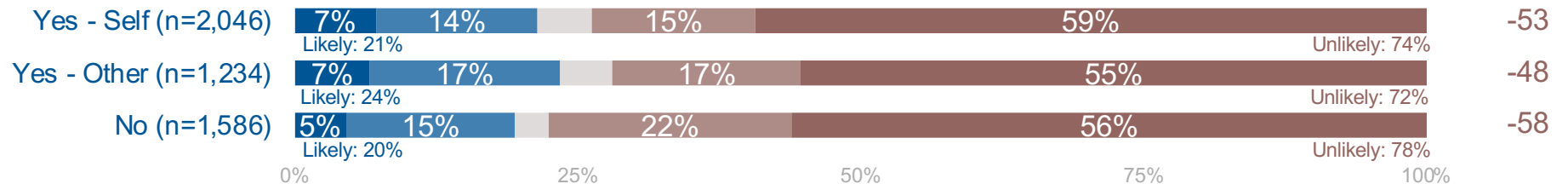
### AGE



### GENDER



### CHRONIC COND.



NET: Likely minus unlikely | Base: All respondents

## >> Likelihood to use AVMC - Hypothetical Scenarios

### SCENARIO 1

(Speak to another doctor)

*"If you had a medical issue, concern or question and for some reason were not able to speak to your family doctor(s) as quickly as you would like, which of the following would you be most likely to do if it were available to you?"*

Have VC consult w/  
another doctor from  
clinic  77%

Use an AVMC  
consultation  5%

Unsure  18%

0% 25% 50% 75% 100%

### SCENARIO 2

(Speak to other member of team)

*"Using the same hypothetical situation – you are unable to connect with your regular family doctor(s) as quickly as you would like – which of the following would you be most likely to do if it were available to you?"*

Have VC consult w/  
other member of  
medical team  76%

Use an AVMC  
consultation  7%

Unsure  17%

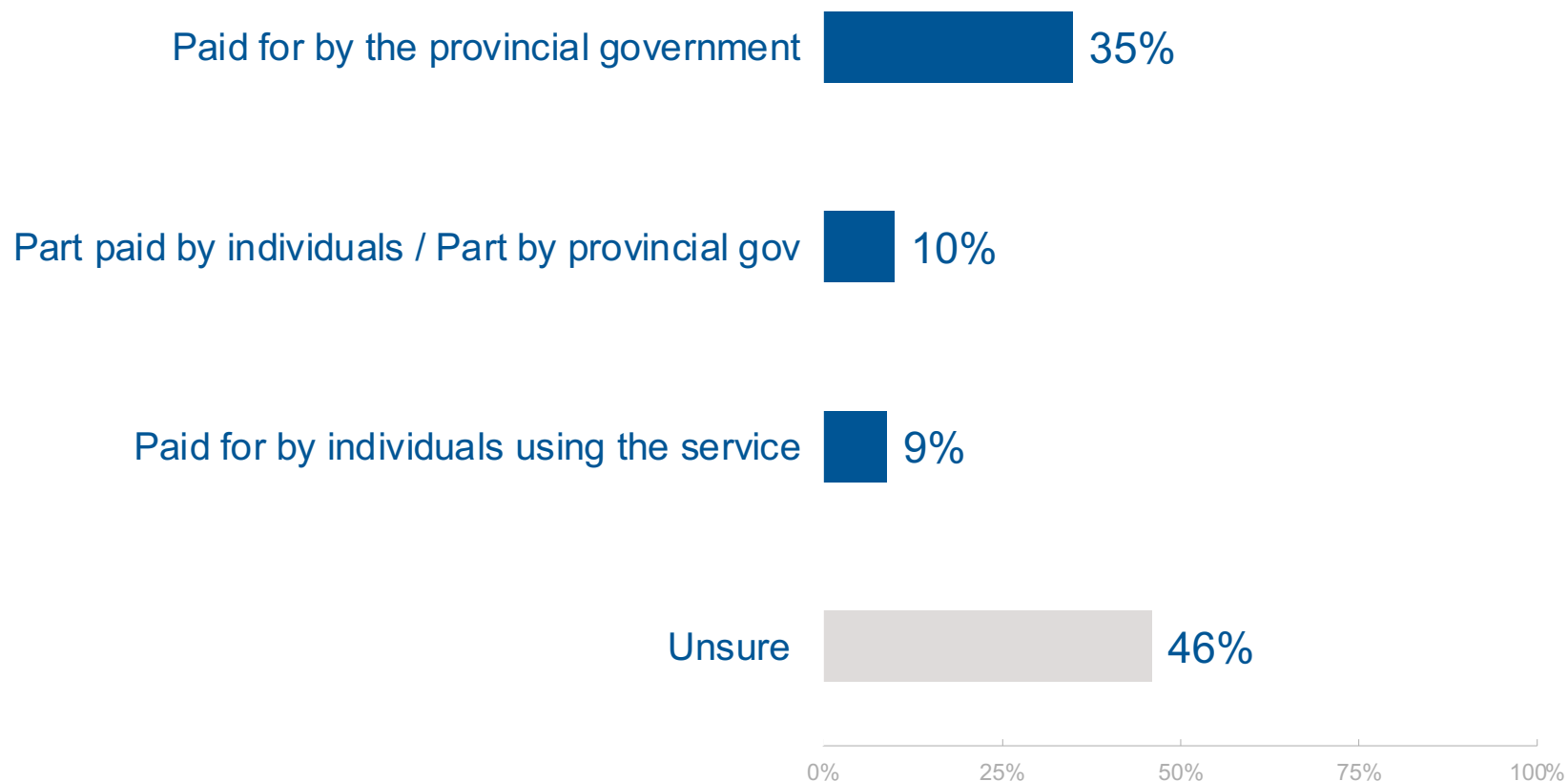
0% 25% 50% 75% 100%

Base: Has a family doctor (n=4,043)



## >> Patient Views on Who Pays AVMC Consultations

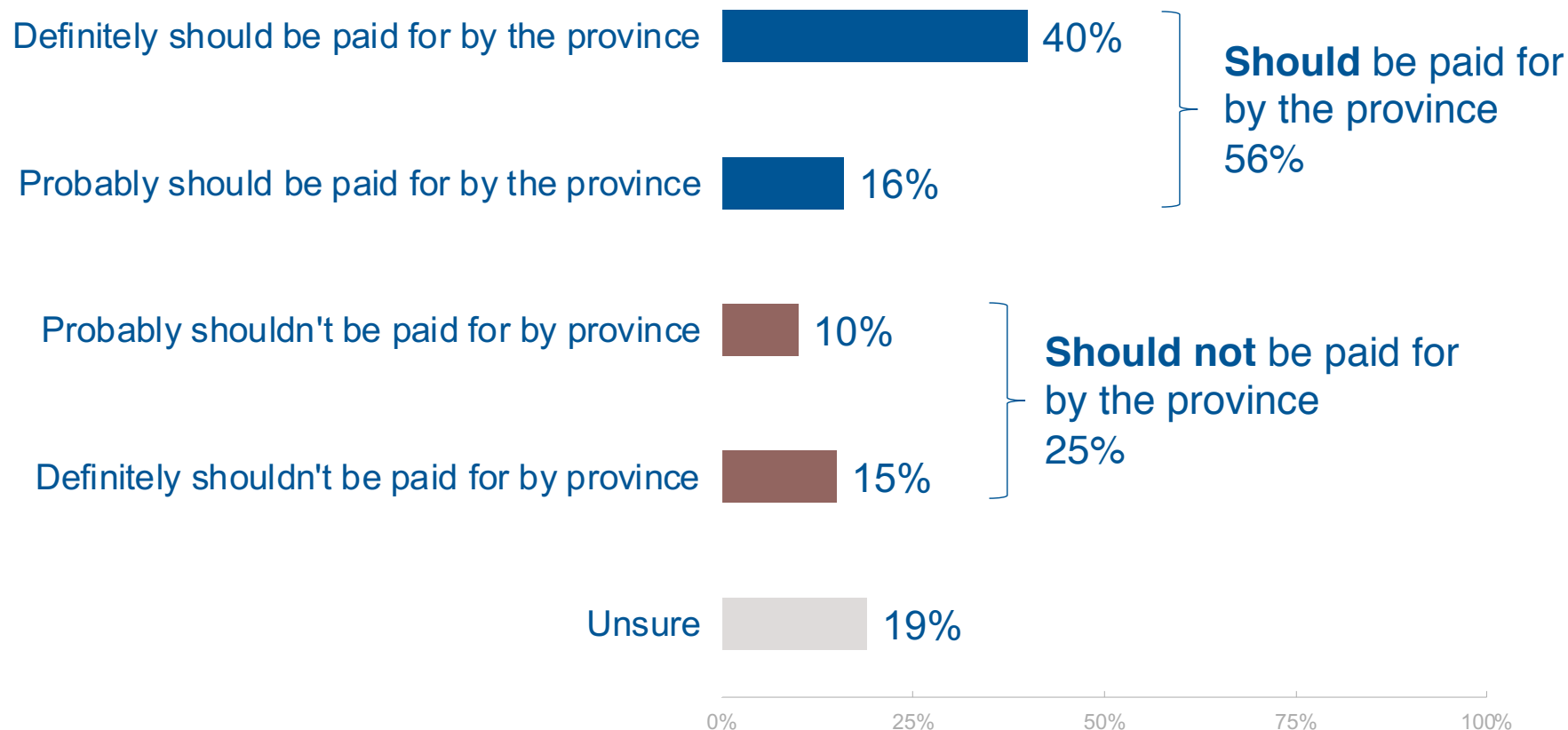
*"To the best of your knowledge, is consultation from an AVMC paid for by the provincial health care system (like seeing your regular doctor) or do individuals using those services pay for accessing them personally?"*



Base: All respondents (n=4,354)

## >> Patient Views on Who Should Pay AVMC Consultations

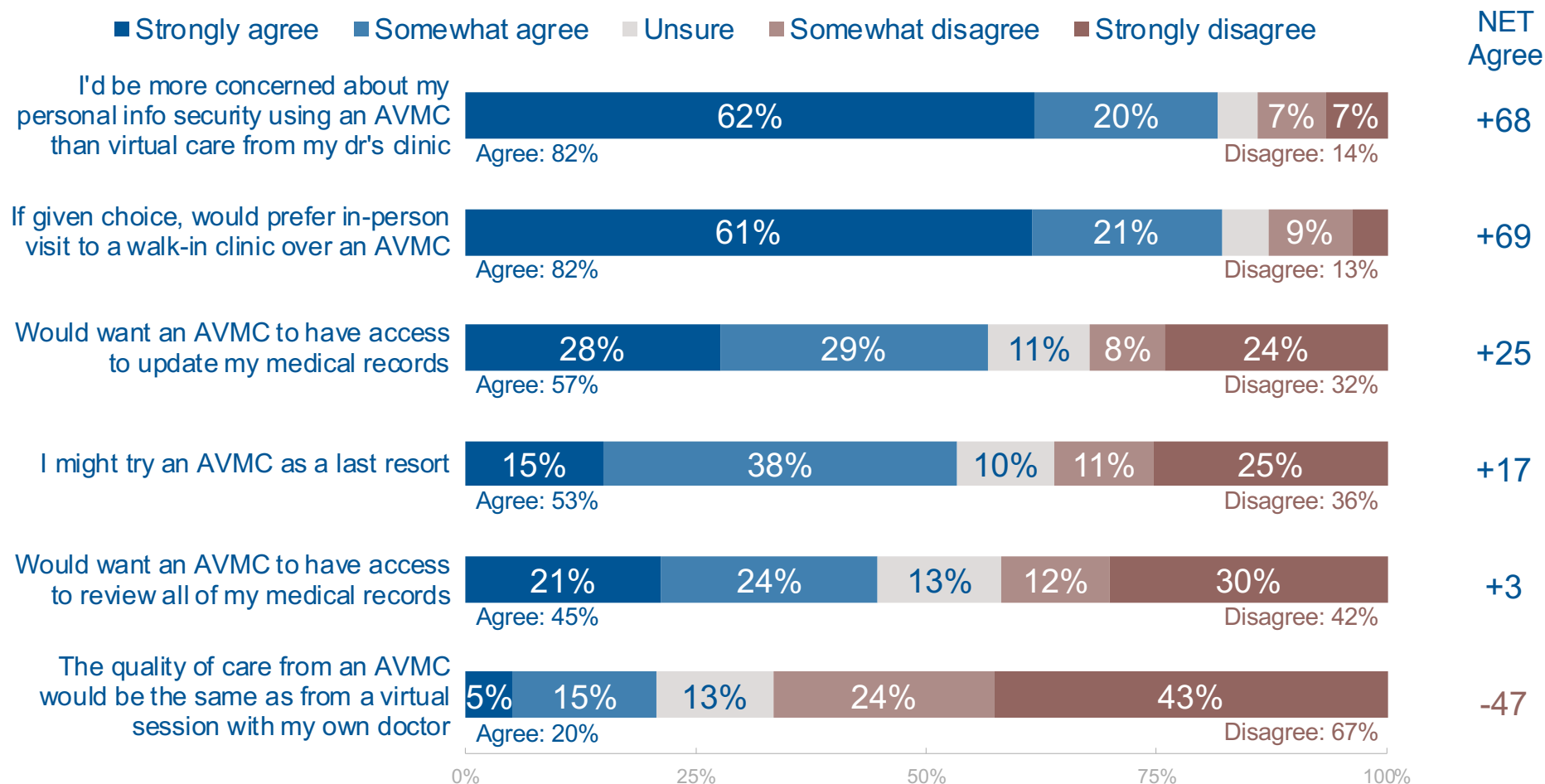
*"And based upon your own personal feelings, do you think that consultations from AVMCs should or should not be paid for by the provincial health care system like seeing your regular doctor(s)?"*



Base: All respondents (n=4,354)

# >> Associated Virtual Medical Services Attitudinals

*“The following is a list of things that some people might say about associated virtual medical services like Babylon and Maple. To what extent do you personally agree or disagree with each?”*



NET: Agree minus disagree | Base: All respondents (n=4,354)

## >> Associated Virtual Medical Services

### Attitudinals by Region

*“The following is a list of things that some people might say about associated virtual medical services like Babylon and Maple. To what extent do you personally agree or disagree with each?”*

% saying Agree (Strongly or Somewhat)	TOTAL (n=4,354)	Region				
		CGY (n=1,520)	EDM (n=1,374)	North (n=525)	Central (n=487)	South (n=448)
More concerned about info security using AVMC than VC from dr's clinic	82%	80%	85%	79%	83%	80%
Would prefer in-person visit to a walk-in clinic over an AVMC	82%	78%	83%	84%	87%	85%
Would want AVMC to have access to update medical records	57%	59%	55%	58%	53%	58%
I might try an AVMC as a last resort	53%	55%	50%	49%	58%	60%
Would want AVMC to have access to review medical records	45%	45%	45%	50%	40%	43%
Quality of care from an AVMC would = a virtual session with own doctor	20%	18%	19%	32%	23%	22%

□ Significantly higher ○ Significantly lower

Base: All respondents

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## >> Associated Virtual Medical Services

### Attitudinals by Age and Gender

*“The following is a list of things that some people might say about associated virtual medical services like Babylon and Maple. To what extent do you personally agree or disagree with each?”*

% saying Agree (Strongly or Somewhat)	TOTAL (n=4,354)	Age (Years)				Gender	
		<45 (n=2,207)	45-54 (n=766)	55-64 (n=693)	65+ (n=688)	Male (n=2,170)	Female (n=2,184)
More concerned about info security using AVMC than VC from dr's clinic	82%	81%	82%	85%	81%	80%	84%
Would prefer in-person visit to a walk-in clinic over an AVMC	82%	78%	83%	85%	90%	84%	80%
Would want AVMC to have access to update medical records	57%	61%	52%	52%	52%	60%	53%
I might try an AVMC as a last resort	53%	54%	54%	51%	52%	56%	51%
Would want AVMC to have access to review medical records	45%	46%	40%	44%	46%	45%	45%
Quality of care from an AVMC would = a virtual session with own doctor	20%	22%	23%	18%	16%	23%	18%

  Significantly higher   Significantly lower

Base: All respondents

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