

Report

Greater Vancouver Board of Trade Health Forum Survey



GREATER VANCOUVER
BOARD OF TRADE

DATE **October 16, 2020**

Leger

We know Canadians

METHODOLOGY

Methodology

Study Population

- British Columbia residents, aged 18 and older.

Data Collection

- A total of n=1,004 online surveys with British Columbia residents were conducted via Leger's online panel, LEO.
- Interviews were conducted from October 9 to October 11, 2020.

Statistical Analysis

- As a non-random internet survey, a margin of error is technically not to be reported.
- If the data were collected through a random sample, the margin of error would be British Columbia residents (n=1,004) $\pm 3.1\%$, 19 times out of 20.
- Using data from the 2016 Census, results were weighted according to age, gender, and region in order to ensure a representative sample of the population.
- The numbers presented have been rounded to the nearest whole number. However, raw values were used to calculate the sums presented and therefore may not correspond to the manual addition of these numbers.

Key Findings

Key Findings (1/2)



- **Nearly six in ten (58%) BC residents needed to consult with a healthcare provider since the start of the COVID-19 pandemic.**
 - Nine in ten (92%) required consultation with a doctor, followed by a pharmacist (33%) and a dentist (30%).



- **The vast majority of those who needed a consultation were able to contact their desired healthcare provider.**
 - For consultations with a doctor, more BC residents chose to use telehealth services (73%) than in-person (42%). Pharmacists (93% in-person) and dentists (97%) had almost all in-person consultations.



- **Two-in-five (40%) patients have had healthcare appointments or treatments postponed by providers as a result of COVID-19.**
 - Moreover, individuals delayed seeking support from healthcare providers themselves, notably from dentists (48%) and doctors (31%).

Key Findings (2/2)



- **71% of those who had a telehealth experience attended by telephone because the healthcare provider offered only this option.**
 - Overall patients were satisfied with their telehealth experience.
 - Just over half of British Columbians will use telehealth in the next 6 months, especially those who already consulted with a provider in-person (70%) or using telehealth (81%).
 - Post-pandemic one-third will continue seeking healthcare via telehealth, and this is even greater among those who have consulted with a professional using telehealth, indicating its success and stickiness.



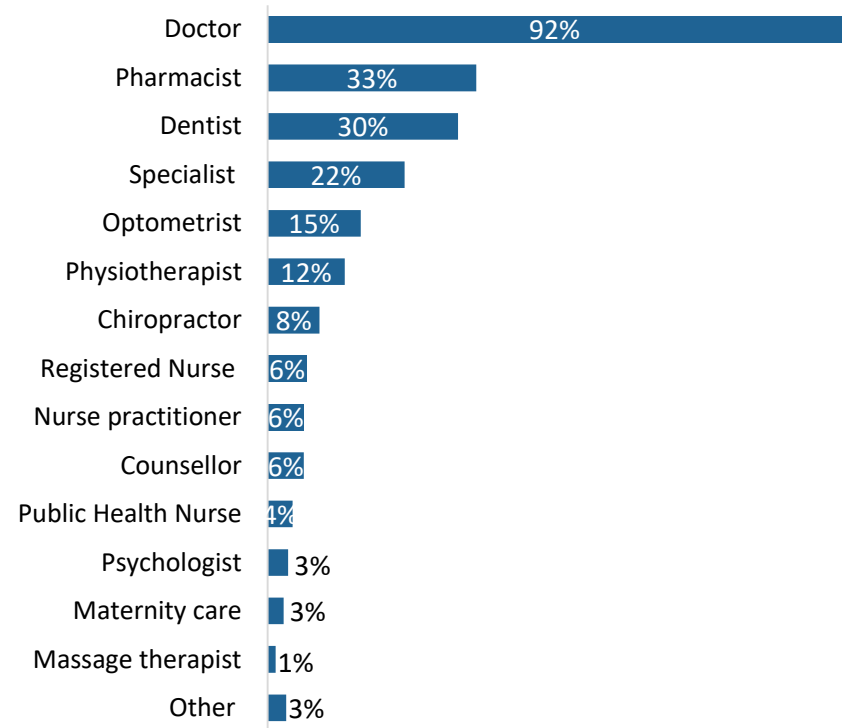
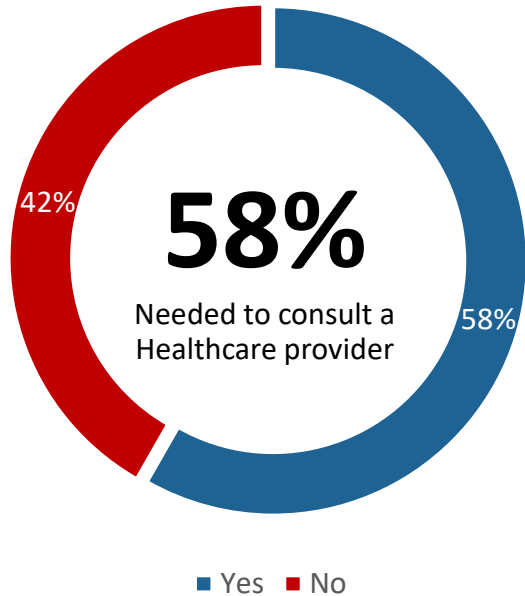
- **One-third of BC residents (32%) feel their mental health is worse now, but only 12% have sought support since the COVID-19 crisis started.**
 - Moreover, 15% of working British Columbians think their mental health has impacted their job performance.



- **Rapid Diagnostic Testing (RDT) would encourage people to engage in activities, especially in attending a family wedding (51%), going to restaurants/bars (35%), spending time at a shopping mall (34%) and travelling outside of Canada for pleasure (33%).**

Detailed Results
Impact of COVID-19 on accessing healthcare

Six in ten British Columbians needed to consult a healthcare provider with most of those seeing their general practitioner.



QA1: Since the start of the COVID-19 pandemic in mid-March, have you needed to consult a Healthcare provider? Base: British Columbia Residents (n=1004)

QA2: What kind of healthcare provider(s) did you needed to consult? (Multiple mentions) Base: BC Residents who needed to consult a Healthcare provider (n=603)

Most patients required 1 or 2 healthcare providers (58%), while fewer than one-quarter needed 4+ professionals.



35%

required to consult **1** provider



23%

required to consult **2** providers



20%

required to consult **3** providers

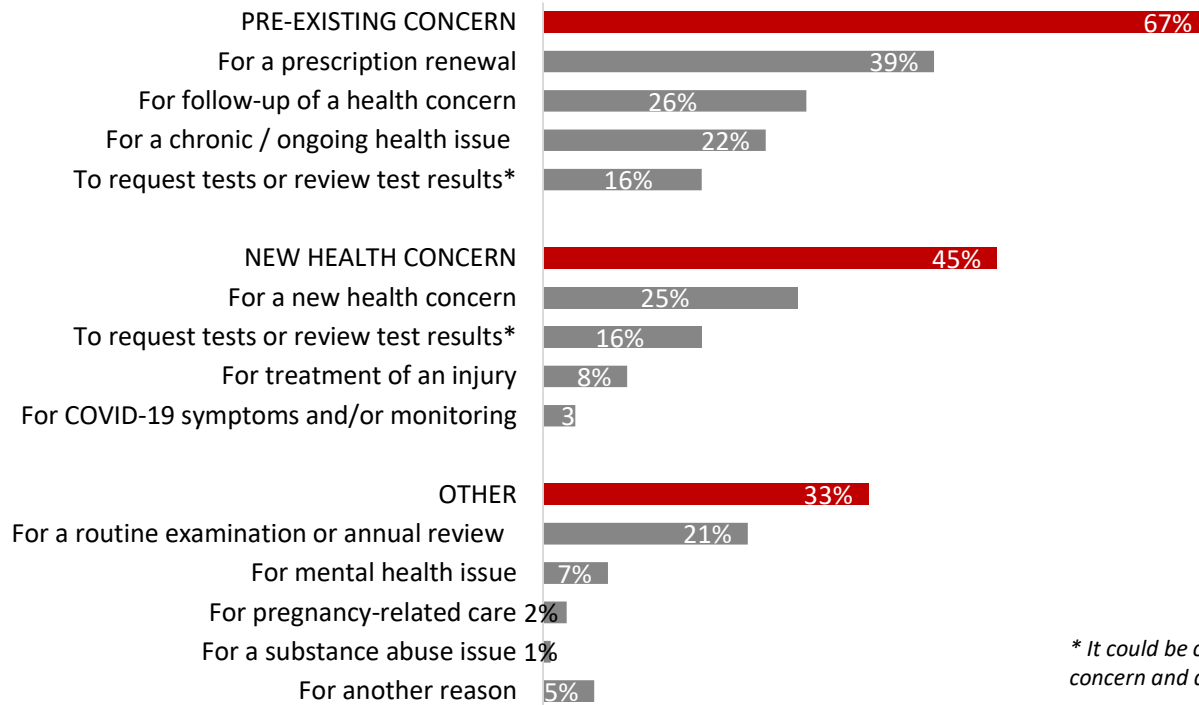


22%

required to consult **4+** providers

	18-34 (n=112)	35-54 (n=158)	55+ (n=333)	Men (n=293)	Women (n=310)	New health concern (n=271)	Pre-existing concern (n=425)	Other (n=189)
1 provider	46%	37%	27%	42%	29%	34%	28%	25%
2 providers	22%	21%	24%	24%	22%	23%	23%	26%
3 providers	15%	21%	22%	17%	22%	15%	24%	23%
4+ providers	17%	21%	27%	17%	27%	28%	25%	27%




The main reasons for consultation centre on pre-existing concerns, predominantly around a prescription renewal, or the follow-up of a health concern.



** It could be considered both as a pre-existing concern and a new health concern*

Despite the growing prevalence of Telehealth options during the COVID-19 pandemic, many Healthcare Providers were predominantly being accessed through in-person consultations.

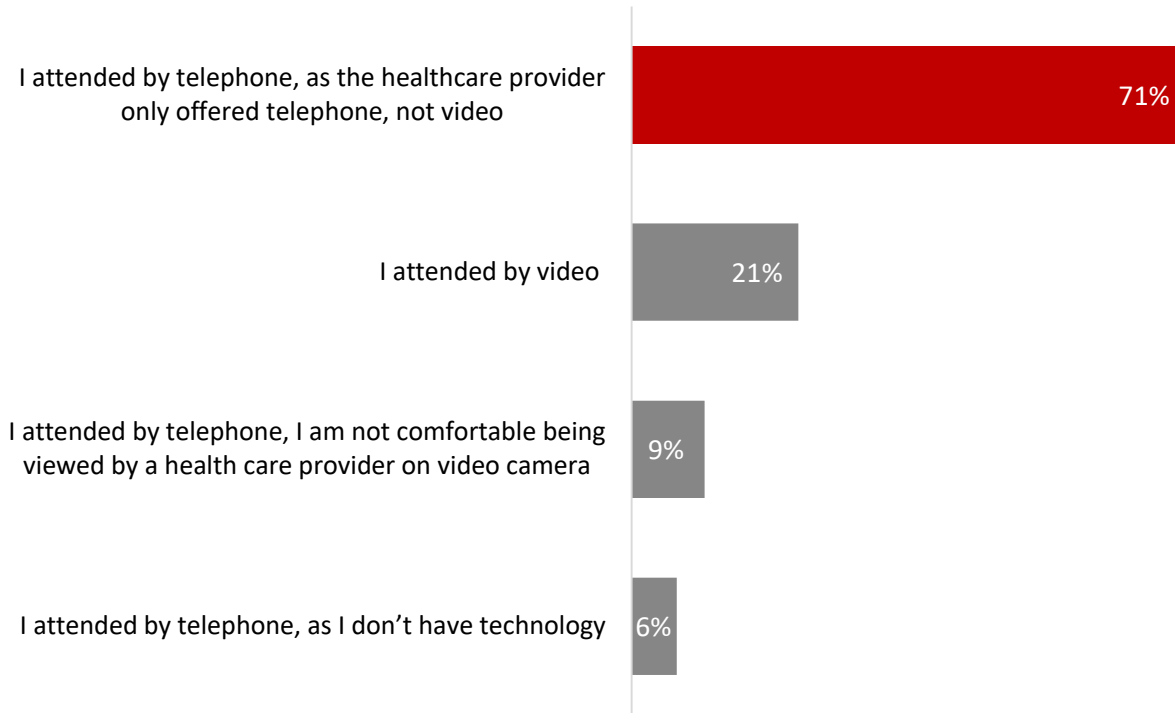


	Summary of those who consulted with a provider	 In-person	Telehealth Any	 Telehealth – video	 Telehealth - telephone
Doctor	96%	42%	73%	14%	62%
Registered Nurse	91%	63%	43%	10%	33%
Nurse practitioner	98%	52%	56%	25%	40%
Specialist	97%	62%	47%	12%	39%
Dentist	96%	97%	5%	-	5%
Chiropractor	97%	96%	6%	6%	4%
Optometrist	96%	97%	5%	2%	4%
Physiotherapist	93%	87%	19%	13%	8%
Counsellor	92%	40%	63%	22%	41%
Psychologist	100%	20%	83%	38%	45%
Public Health Nurse	86%	74%	36%	5%	31%
Pharmacist	98%	93%	13%	1%	12%
Maternity care	100%	100%	50%	13%	43%
Massage therapist	100%	100%	-	-	-
Other	100%	72%	30%	17%	20%

QA4: How did you consult with them?

Base: BC Residents who were able to consult a Healthcare provider

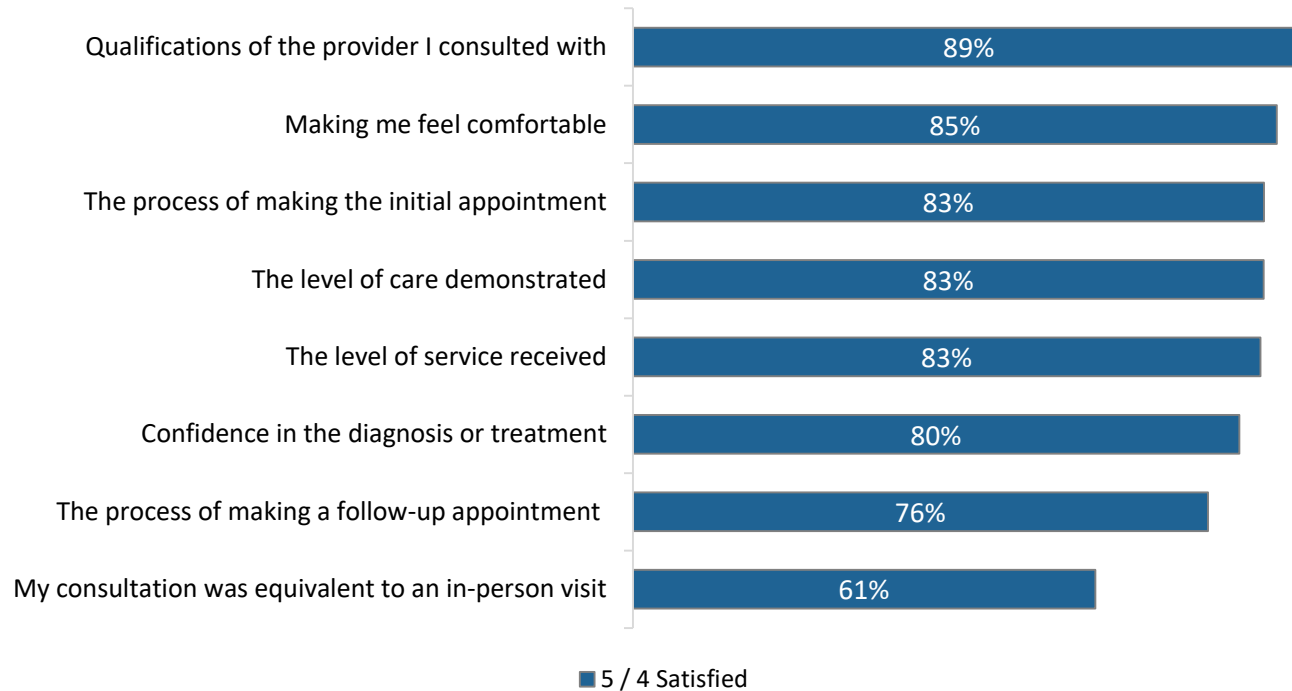
Seven in ten British Columbians attended a telehealth visit by telephone, as the healthcare provider only offered telephone and not video.



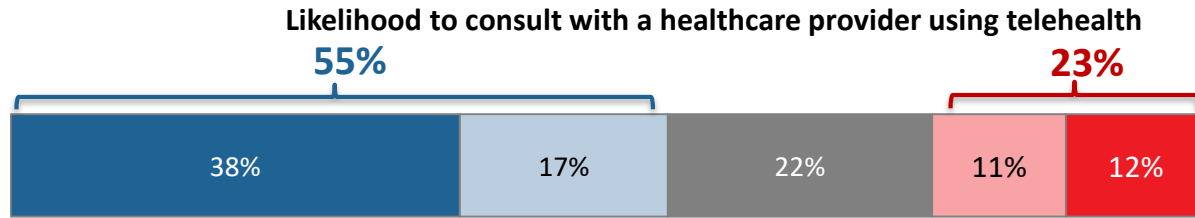
QA7: For your telehealth visit, please select the statement that best reflects your choice for how you engaged in the session.

Base: BC Residents who had a telehealth experience (n=445)

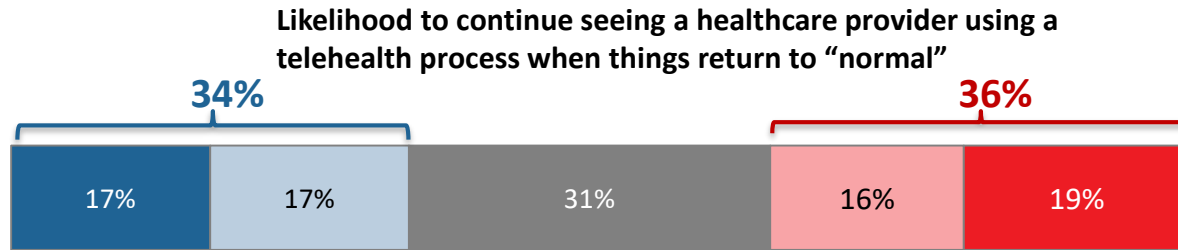
British Columbians are quite satisfied with their consultation experience with a doctor



Just over half of British Columbians will use telehealth in the next 6 months, however post-pandemic many will return to seeking healthcare in person.



Likelihood to consult with a provider using telehealth among.....	
Patients who consulted with a provider in-person	Patients who consulted with a provider using telehealth
70%	81%



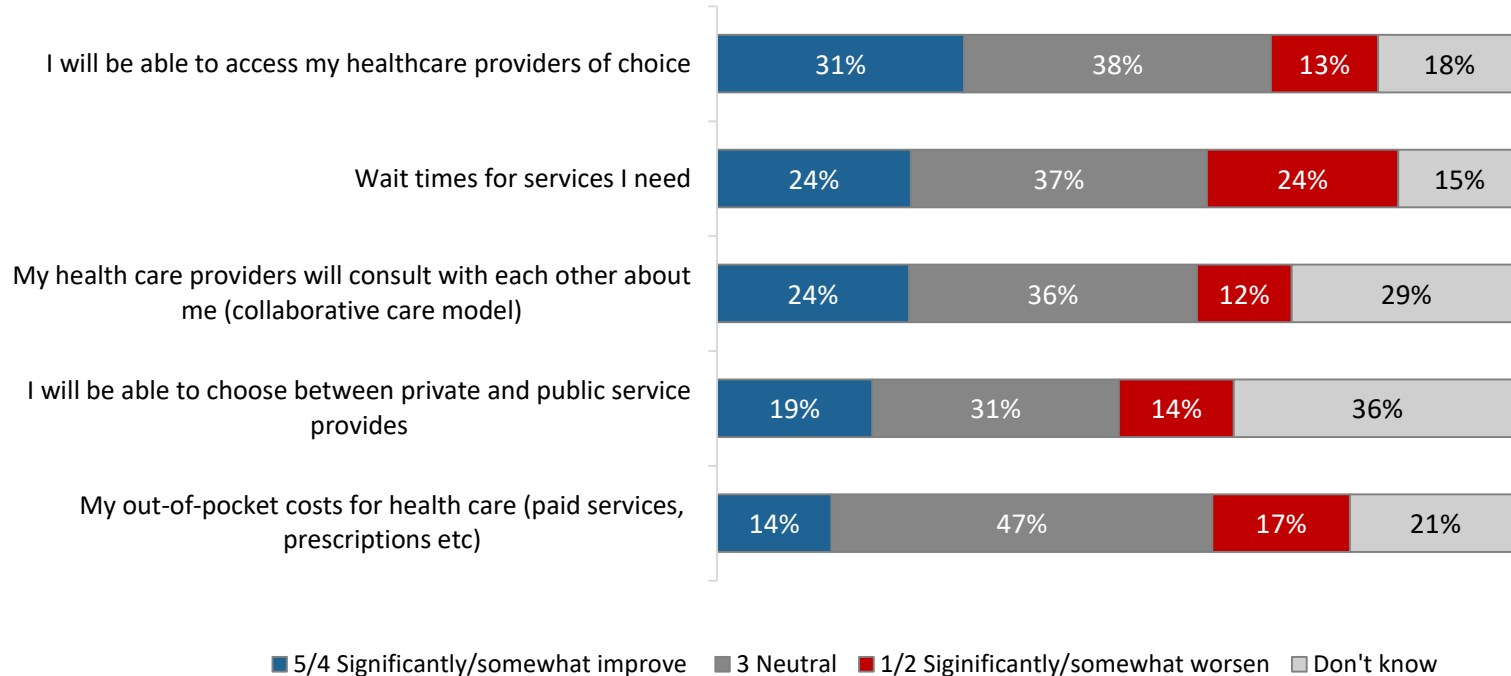
Likelihood to continue seeing a provider using telehealth when "normal" among....	
Patients who consulted with a provider in-person	Patients who consulted with a provider using telehealth
39%	45%

■ 5. Very likely ■ 4 ■ 3 ■ 2 ■ 1. Not at all likely

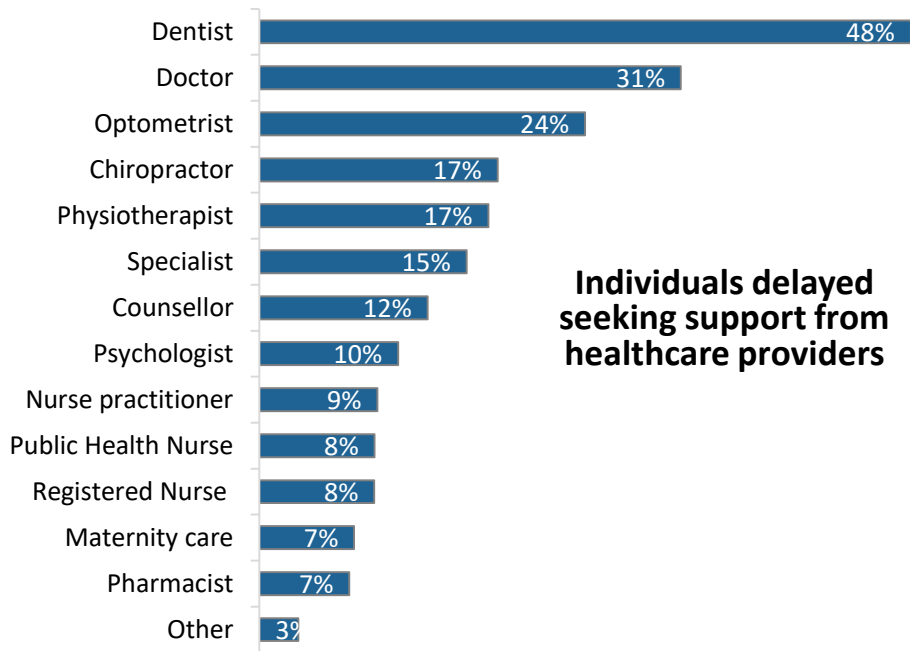
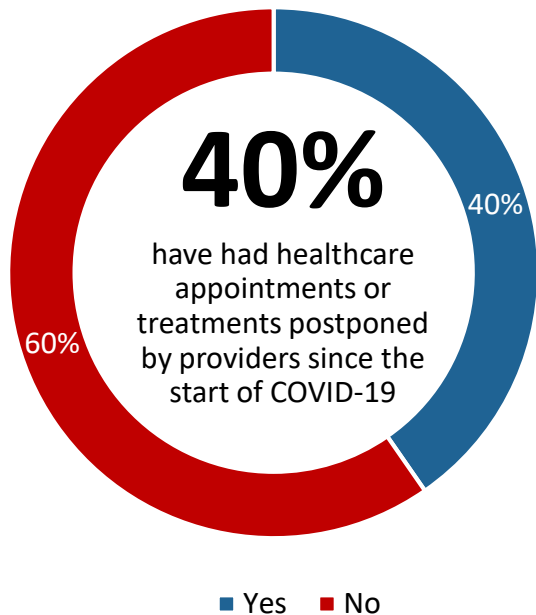
Blue indicates significantly higher results compared to other groups;
 Red indicates significantly lower results compared to other groups.¹⁴

QA6. How likely are you to consult with a healthcare provider using telehealth (e.g. telephone or video consult) during the next 6 months?
 QA7.2 Depending on the reasons for the consult, when things return to "normal" (post COVID-19) how likely are you to continue to see your healthcare provider using a telehealth process? Base: British Columbia Residents (n=1004)

British Columbians perceive most components of the healthcare experience are likely to improve post-pandemic



Healthcare visits were delayed as a result of COVID-19

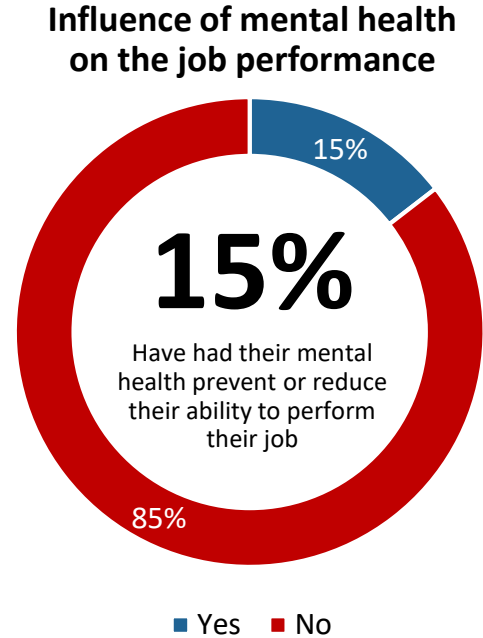
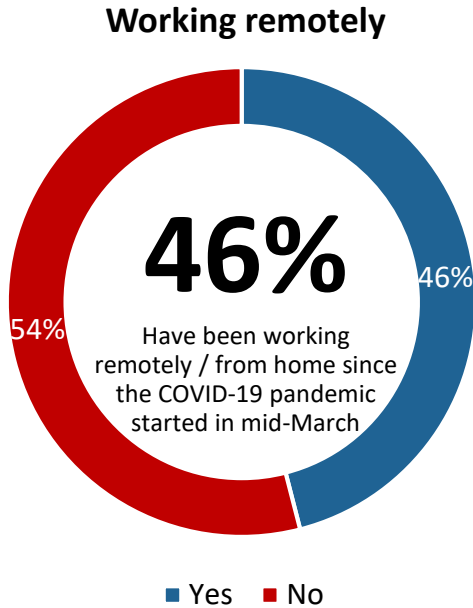


QA10. Since the start of COVID-19, have you delayed or put off seeking support from healthcare providers?

QA11. Since the start of COVID-19, have you had healthcare appointments or treatments postponed by providers?

Base: British Columbia Residents (n=1004)

COVID-19's impact on working British Columbians has meant almost half are now working remotely

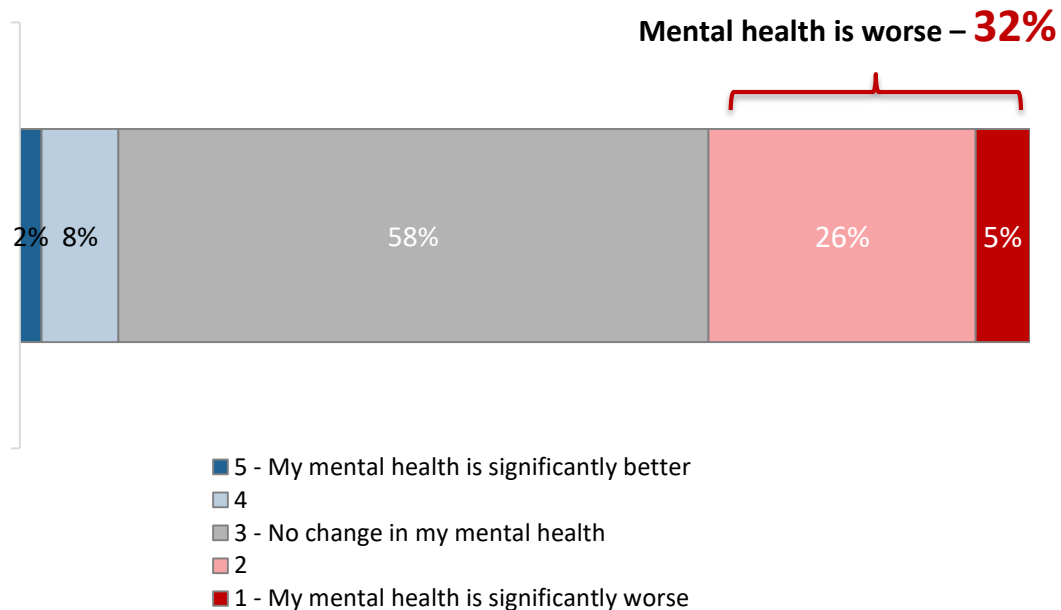
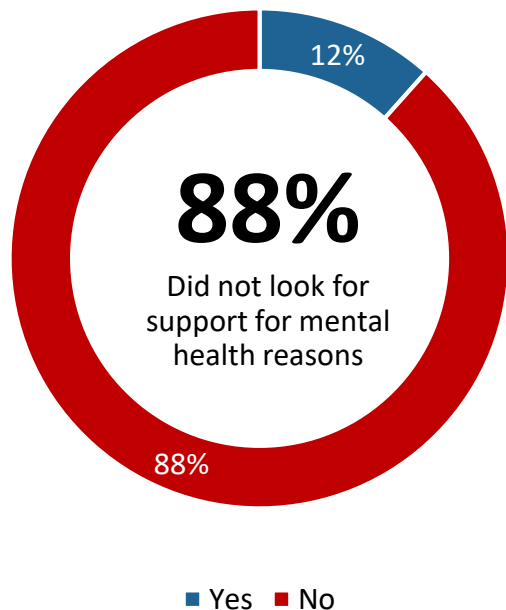


QA12. Have you been working remotely / from home since the COVID-19 pandemic started in mid-March?

QA15. Has your mental health prevented or reduced your ability to perform your job?

Base: British Columbia Residents who are currently employed (n=493)

One-third report a negative change in their mental health, but only 12% have sought support

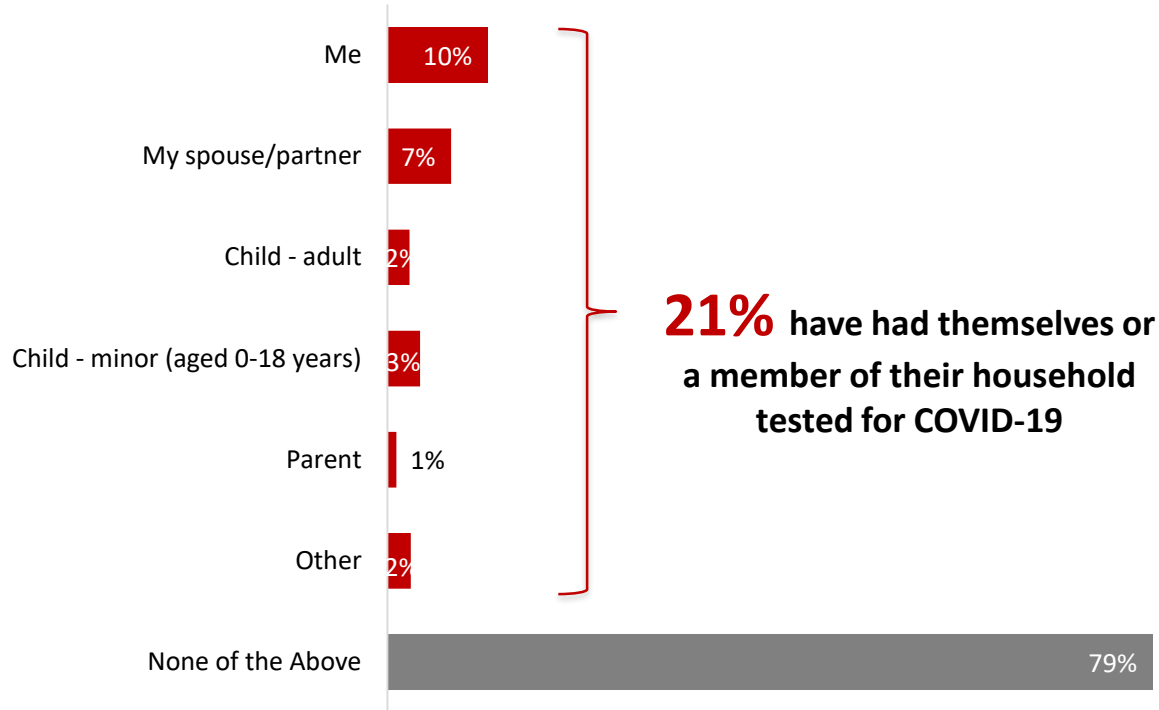


QA13. Since the beginning of the COVID-19 crisis, has there been any change in your mental health?

QA14. Have you sought support for mental health reasons since the COVID-19 crisis started in mid-March?

Base: British Columbia Residents (n=1004)

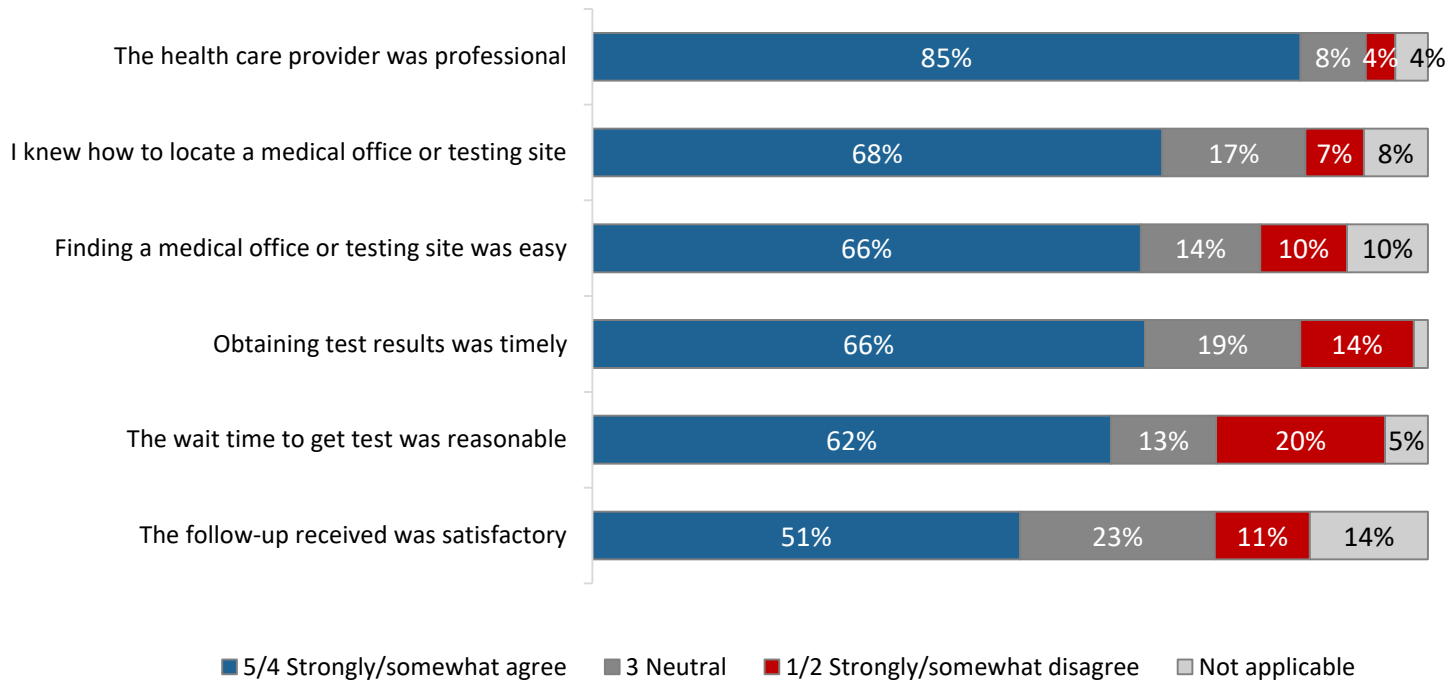
One in Five (21%) British Columbians have been tested for COVID-19



QA16. Have you or a member of your household been tested for COVID?

Base: British Columbia Residents (n=1004)

The testing experience was predominantly viewed as successful, although there is room for improvement on being followed-up



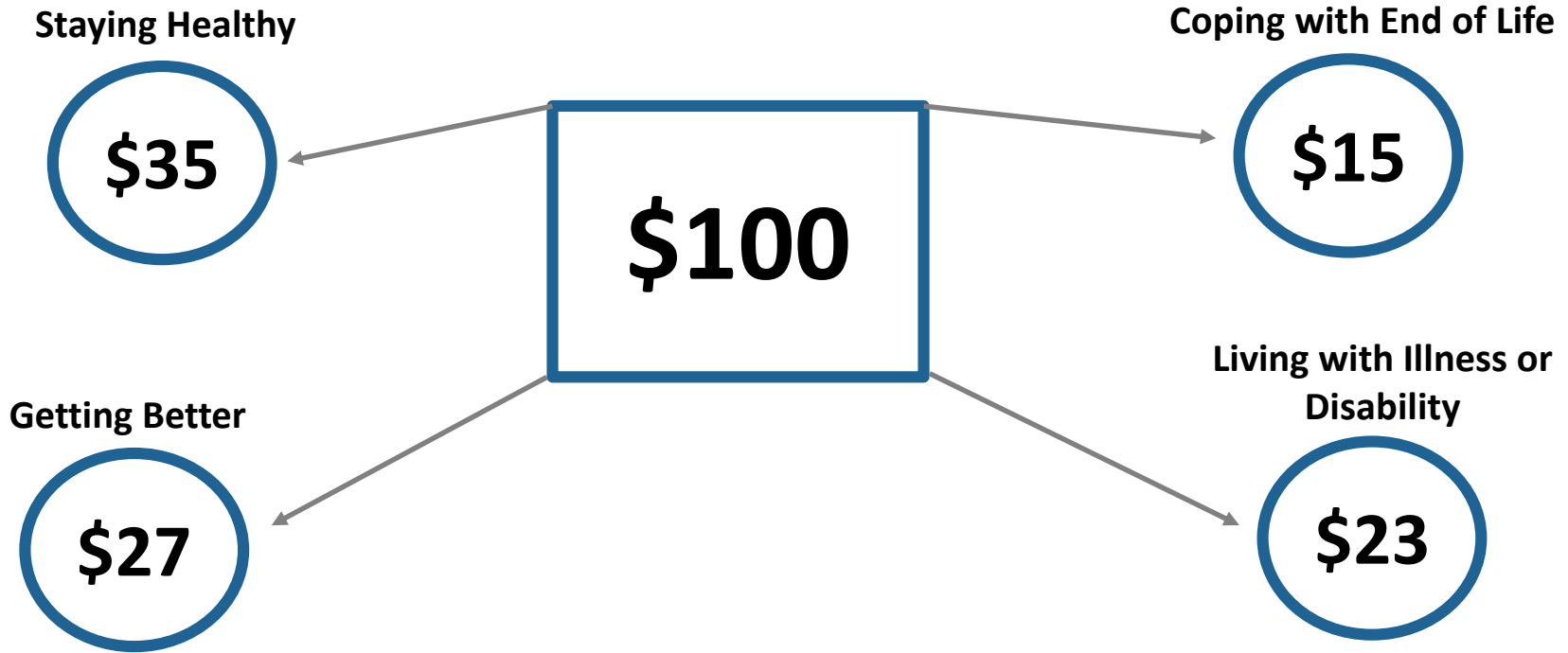
QA17. Please rate the experience of being tested for COVID-19.

Responses 2% and less not labelled

Base: British Columbia Residents who have been tested for COVID-19 themselves (n=94)

Detailed Results
Impact on policy

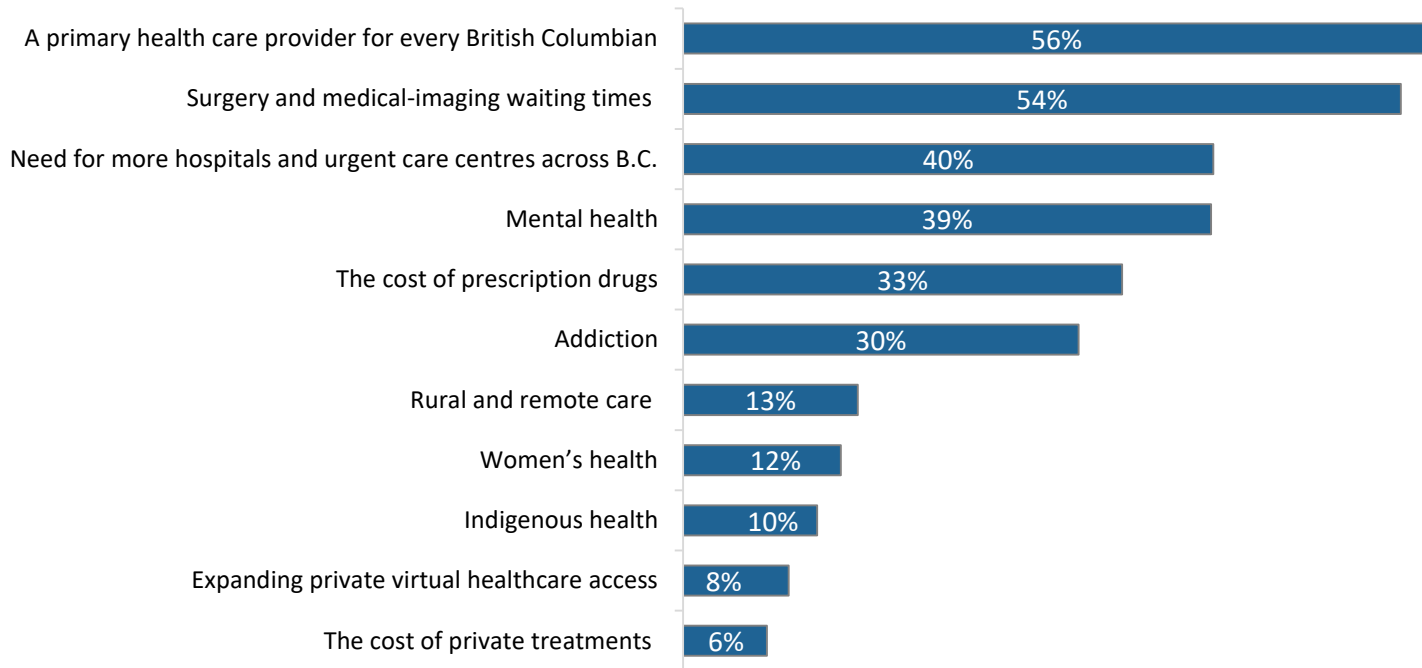
British Columbians prefer money allocated toward health care resources focused on staying healthy and getting better, rather than coping mechanisms.



QB1. We'd like to know how you think BC should prioritize its health care resources. Imagine you have an overall budget of \$100 on behalf of all British Columbians, how much would you spend on each category...

Base: British Columbia Residents (n=1004)

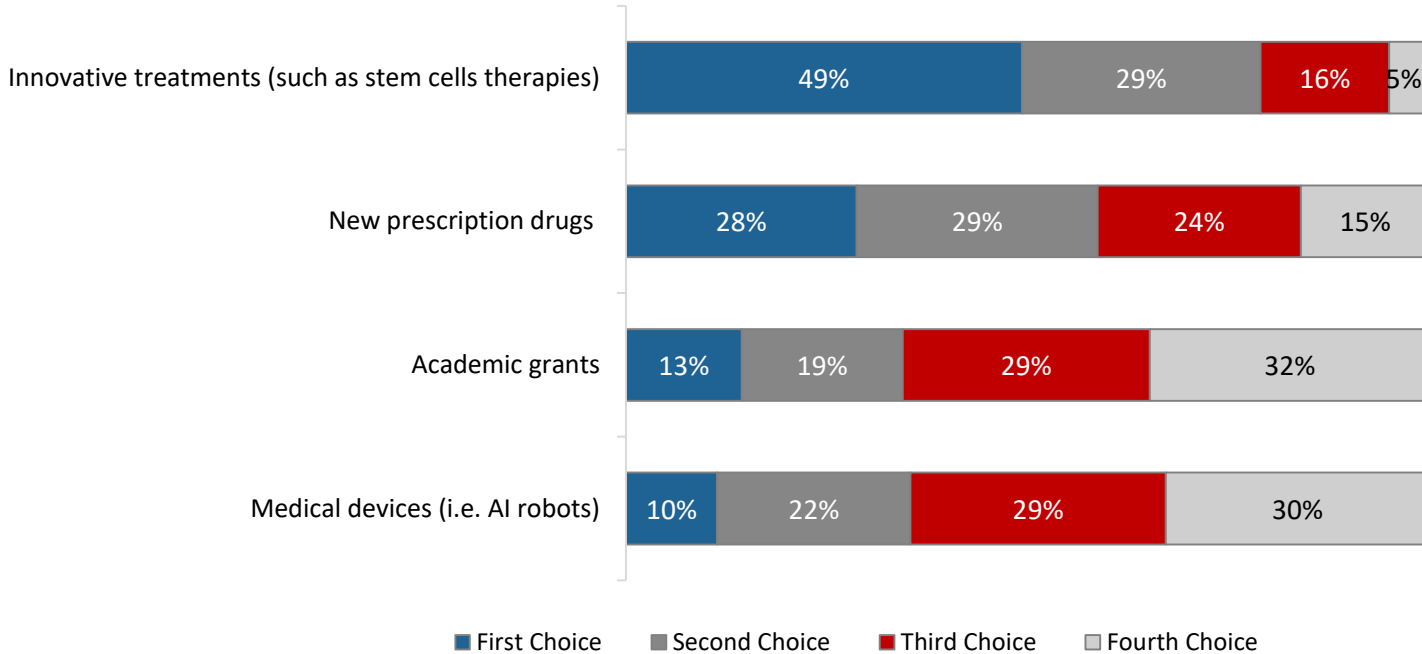
The most significant issues facing BC healthcare today include the number of providers, and reducing wait times.



QB2: Rank the 3 most significant issues facing BC healthcare today. 1 means it's the most significant, 2 means it's the second most significant, and 3 means it's the third most significant.

Base: British Columbia Residents (n=1004)

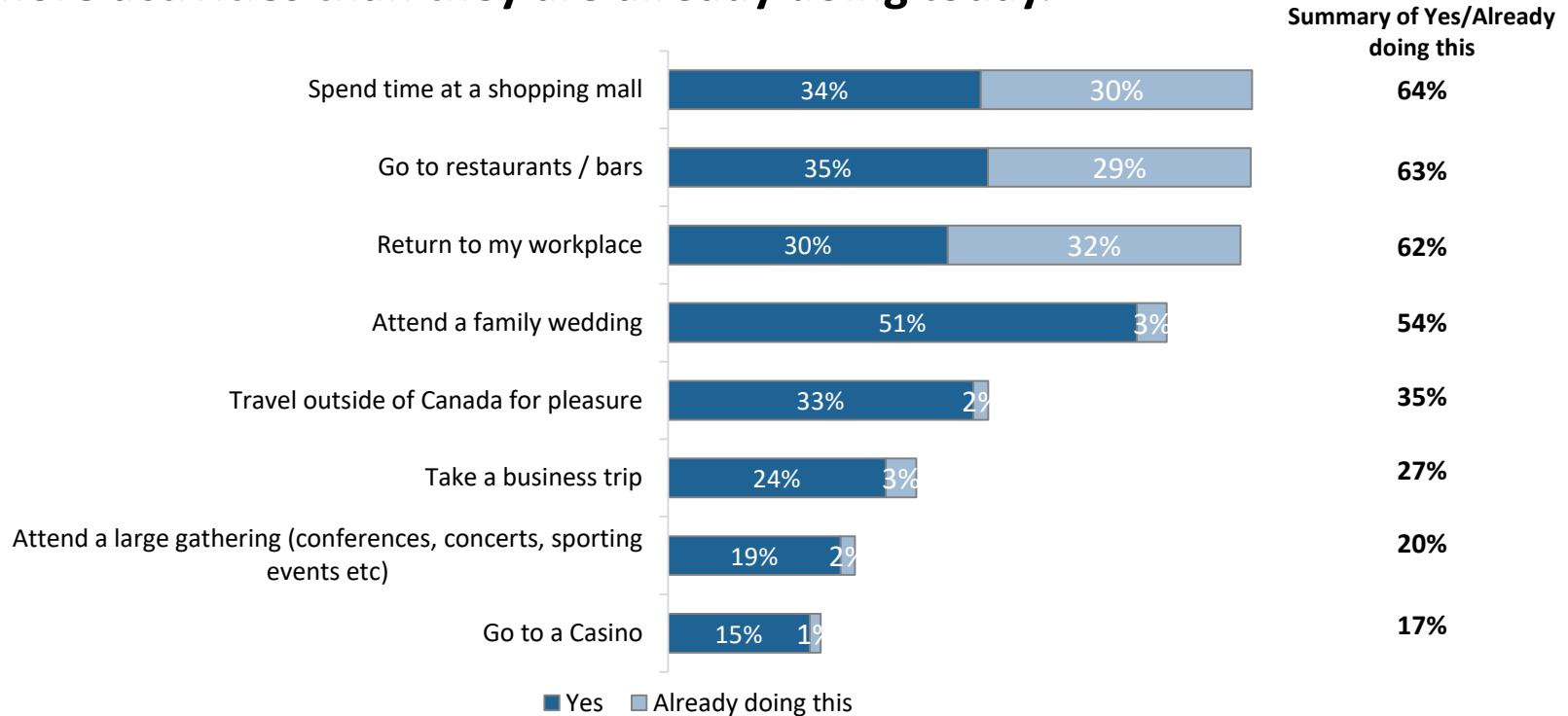
British Columbians favour funding innovative treatments



QB4. The life sciences industry, which includes pharmaceutical, biotechnology, medical device, academic, and other has been central to innovation in healthcare. What further innovation to the life sciences and healthcare ecosystems do you think the BC government should support with funding or tax breaks? Please rank the following innovation in order of your preference.

Base: British Columbia Residents (n=1004)

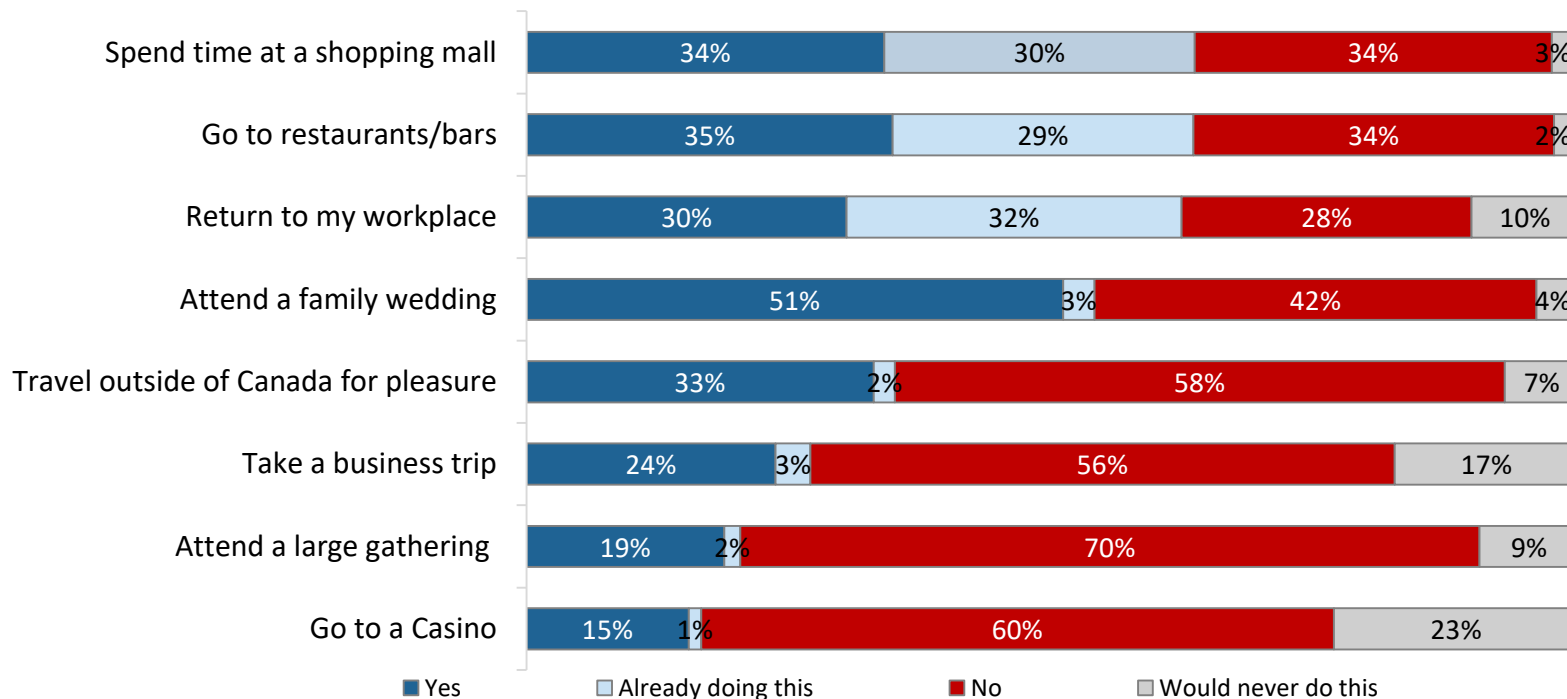
Rapid Diagnostic Testing (RDT) would encourage people to engage in more activities than they are already doing today.



QB5. Currently governments in Canada are exploring rapid diagnostic testing (RDT) which may detect the presence of the COVID-19 virus, generating results within 30 minutes. If this were to be available to you and those around you, would you participate in the following:

Base: British Columbia Residents (n=1004)

Rapid Diagnostic Testing (RDT) would encourage people to engage in more activities than they are already doing today.



QB5. Currently governments in Canada are exploring rapid diagnostic testing (RDT) which may detect the presence of the COVID-19 virus, generating results within 30 minutes. If this were to be available to you and those around you, would you participate in the following:

Base: British Columbia Residents (n=1004)

RESPONDENT PROFILE – *British Columbia*



	Weighted
n=	1004
Gender	(%)
Male	48
Female	52
Age	
18 to 34	27
35 to 54	33
55 years of age or older	40
Region	
Greater Vancouver (Metro)	53
Greater Victoria	8
Rest of BC	39

	Weighted
n=	1004
Household Income	(%)
Less than \$40K	19
\$40K to less than \$80K	29
\$80K and over	44
Visible Minority	
Yes	20
No	75
Don't know	4
Ethnicity	
Caucasian (white)	73
Other	26
Prefer not to answer	2

OUR SERVICES

- **Leger**
Marketing research and polling
- **Leger Metrics**
Real-time VOC satisfaction measurement
- **Leger Analytics**
Data modeling and analysis
- **Legerweb**
Panel management
- **Leger Communities**
Online community management
- **Leger Digital**
Digital strategy and user experience
- **International Research**
Worldwide Independent Network (WIN)

600
EMPLOYEES



185
CONSULTANTS



8
OFFICES

CALGARY | EDMONTON | MONTREAL | PHILADELPHIA
QUEBEC CITY | TORONTO | VANCOUVER | WINNIPEG

OUR CREDENTIALS



Leger is a member of the [Canadian Research Insights Council \(CRIC\)](#), the industry association for the market/survey/insights research industry.



Leger is a member of [ESOMAR](#) (European Society for Opinion and Market Research), the global association of opinion polls and marketing research professionals. As such, Leger is committed to applying the [international ICC/ESOMAR](#) code of Market, Opinion and Social Research and Data Analytics.



Leger is also a member of the [Insights Association](#), the American Association of Marketing Research Analytics.

Leger

We know Canadians



leger360.com



@leger360



/LegerCanada



/company/leger360



@leger360