

maple

Health on hold: The need to unlock a proactive care future in Canada

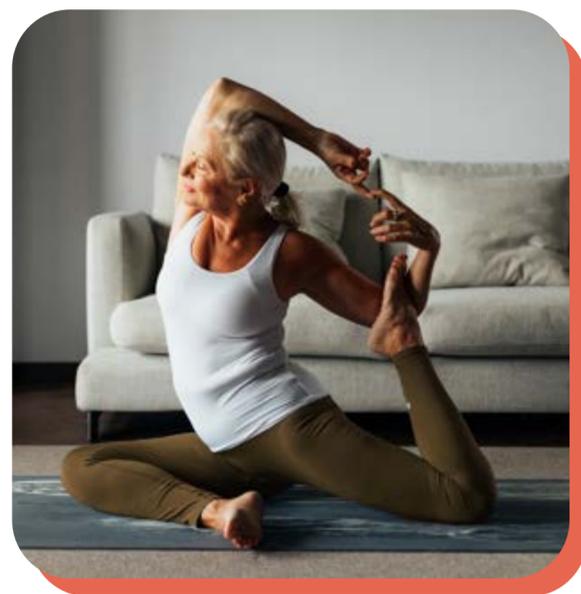
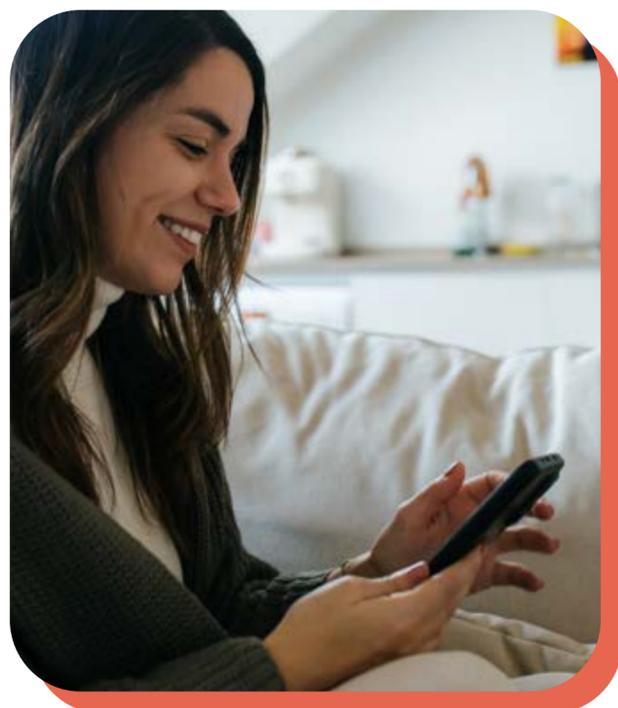
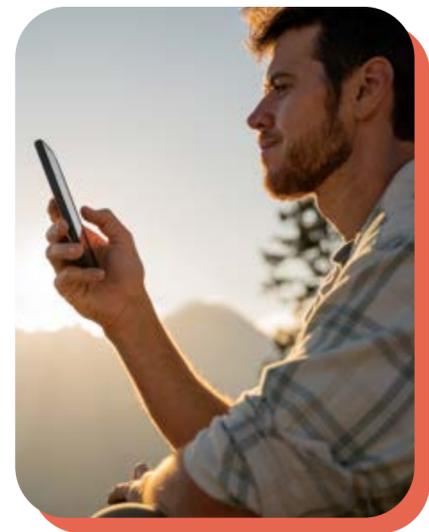
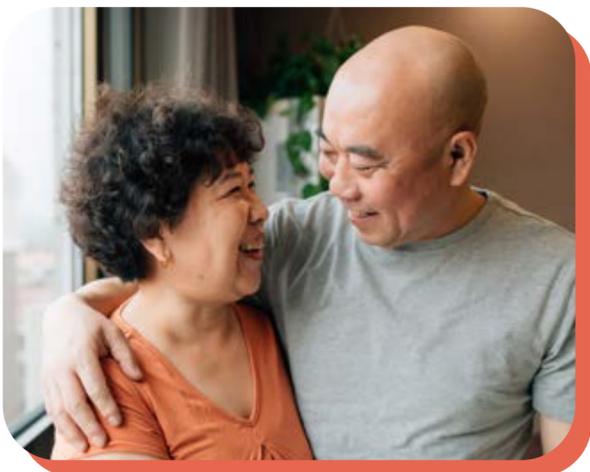


Table of contents

	Page
Executive summary	3
A letter from our CEO and co-founder	4
A state of the nation: Canadians feel out of control over their health. Period.	5
Access denied: Canadians are frustrated navigating the healthcare system	9
Paging Dr. Google: The dangerous shortcut Canadians take with their health	10
Canadians aren't getting the care they want: Coast to coast, Canadians demand more access to primary care	12
Diving deep: The unique challenges of young Canadians	14
Dissuaded and delayed: Women value proactive care, but access challenges remain	15
A look ahead: Investing in a proactive future	17
About Maple and survey methodology	18

Executive summary

Technology has transformed our everyday lives, giving us more control than ever before. With just a few taps, we can instantly order groceries, hail a taxi and manage everything from our schedules to our finances.

We've become accustomed to using technology to make everyday tasks more convenient and manageable, staying steps ahead of challenges before they become bigger problems. This kind of empowerment has reshaped our behaviour and expectations — Canadians are accustomed to having control over their lives.

Yet, this sense of control and empowerment falls away when it comes to one of the most important parts of Canadians' lives. Nearly half of Canadian adults don't feel in control of their healthcare.

Today, one in five Canadian adults don't have a regular primary care provider.¹ Many people wait to seek care until a minor issue becomes major. There are many consequences of this, such as an increase in the number of people who receive a cancer diagnosis after a visit to an emergency room.²

In the long term, spending money on proactive care makes fiscal and medical sense. A study of countries with universal healthcare, including Canada, shows that every \$1 invested in preventative healthcare saves an estimated \$14 in costs to the health system and the economy in the future.³ There is also a high human cost when proactive care isn't readily available or accessible. Based on Statistics Canada data, at least 35% of all deaths of those under 75 were potentially avoidable through proactive care efforts like lifestyle changes and vaccinations, effective screening or early detection and ongoing treatment of conditions.⁴

Despite the clear benefits of proactive care, many Canadians feel the current system isn't supporting a proactive approach. A new survey of 1,500 Canadians from across the country, conducted by Maple among Angus Reid Forum members, confirms that Canadians feel frustrated with their lack of control over their own healthcare.

86% of Canadians who don't feel in control of their healthcare want to see a doctor more often.

50% of Canadians delay seeking medical advice despite health concerns.

47% of Canadians find it challenging to access proactive healthcare services.

The evidence is clear: Canadians don't feel empowered to be proactive about their healthcare despite a deep desire to be proactive.

Proactive care — such as routine checkups, referrals for testing and preventative screening, tests and treatments — is about addressing health needs promptly rather than waiting until conditions worsen or become untreatable. This could involve anything from a breast exam to a cholesterol test. When healthcare becomes more about prevention than reaction, people can address concerns early, improving long-term health and productivity and reducing strain on the system.

The new data paints a picture of the reactive healthcare system that Canadians contend with by putting off speaking to a doctor, looking for solutions on their own and neglecting proactive care.

81% of Canadians say they've faced barriers to receiving proactive care.

55% of Canadian women delay seeking medical advice despite concerns, compared to 45% of Canadian men.

77% of Canadians have used Google to check serious health symptoms instead of consulting a healthcare professional.

The consequences of this system affect all Canadians. When symptoms go unaddressed, health outcomes worsen and the costs to our public system soar.

It doesn't have to be this way. Investing in proactive and preventative healthcare isn't only good for Canadians' personal health, but for the sustainability of the country's healthcare system. Take the early detection and diagnosis of breast cancer as an example. While it's widely recommended that women over the age of 40 get a breast exam every two years, a study published this year found that annual screening for breast cancer can save the healthcare system nearly \$443 million annually. This is one of many examples that makes the case for expanding access to proactive care.⁵

By shifting towards a healthcare system that prioritizes proactive care, Canadians can take control of their health and address issues before they occur or worsen. The survey highlights that Canadians want better access to preventative care and the need for change is urgent. If we empower individuals with the right tools and timely access to care, we can improve health outcomes, reduce the burden on the healthcare system and ultimately create a healthier, more resilient Canada.

To learn more about these insights and how we can work toward a proactive healthcare system, read the full report below.

From our CEO and co-founder: The proactive care transformation must start now



As an emergency room physician, I've witnessed Canadians struggle to access healthcare first-hand, often delaying treatment for non-urgent issues until they become emergencies. This problem has only worsened with increased pressure on our healthcare system due to a growing and aging population, while the number of primary care providers hasn't kept pace with rising demand.

In 2015, I launched Maple with the belief that technology could play a key role in alleviating some of these pressures. Technology like virtual care has proven to be a valuable tool in keeping Canadians out of the ER and Canadians have embraced it.

My experiences in the ER and at Maple are the driving force behind focusing this report on the state of proactive care in Canada. Proactive care is the foundation of a healthier future. It's about preventing illnesses before they occur or escalate — whether it's routine checkups, preventative screenings or ongoing management of chronic conditions. Unfortunately, millions of Canadians face barriers to accessing this type of care, with many forced to turn to emergency services for issues that could've been prevented or treated earlier.

Despite technology advancing ways to access care, a critical gap remains in how Canadians approach their health. While we've adopted technology to proactively manage many areas of our lives, healthcare remains one of the few spaces where we often remain reactive — waiting until issues become urgent before seeking care. This reactive approach not only strains an already overburdened healthcare system but also puts lives at risk.

Shifting to a model that prioritizes proactive care can significantly reduce the strain on our system while empowering Canadians to take control of their health. It's not just about preventing illness. It's about promoting long-term wellness and creating a more sustainable healthcare system. Given the challenges in accessing healthcare providers in Canada, technology — particularly virtual care — will be a vital enabler of this shift.

The urgency for change is undeniable. Canadians increasingly feel that their healthcare is slipping out of their control and they're ready for a system that supports proactive care. Now is the time for our healthcare system to embrace the tools and technologies that'll make this future a reality.

A handwritten signature in black ink that reads "B. Belchetz". The signature is fluid and cursive, with a large initial "B" and a stylized "Belchetz" following.

— Dr. Brett Belchetz
CEO and co-founder, Maple

A state of the nation: Canadians feel out of control over their healthcare. **Period.**

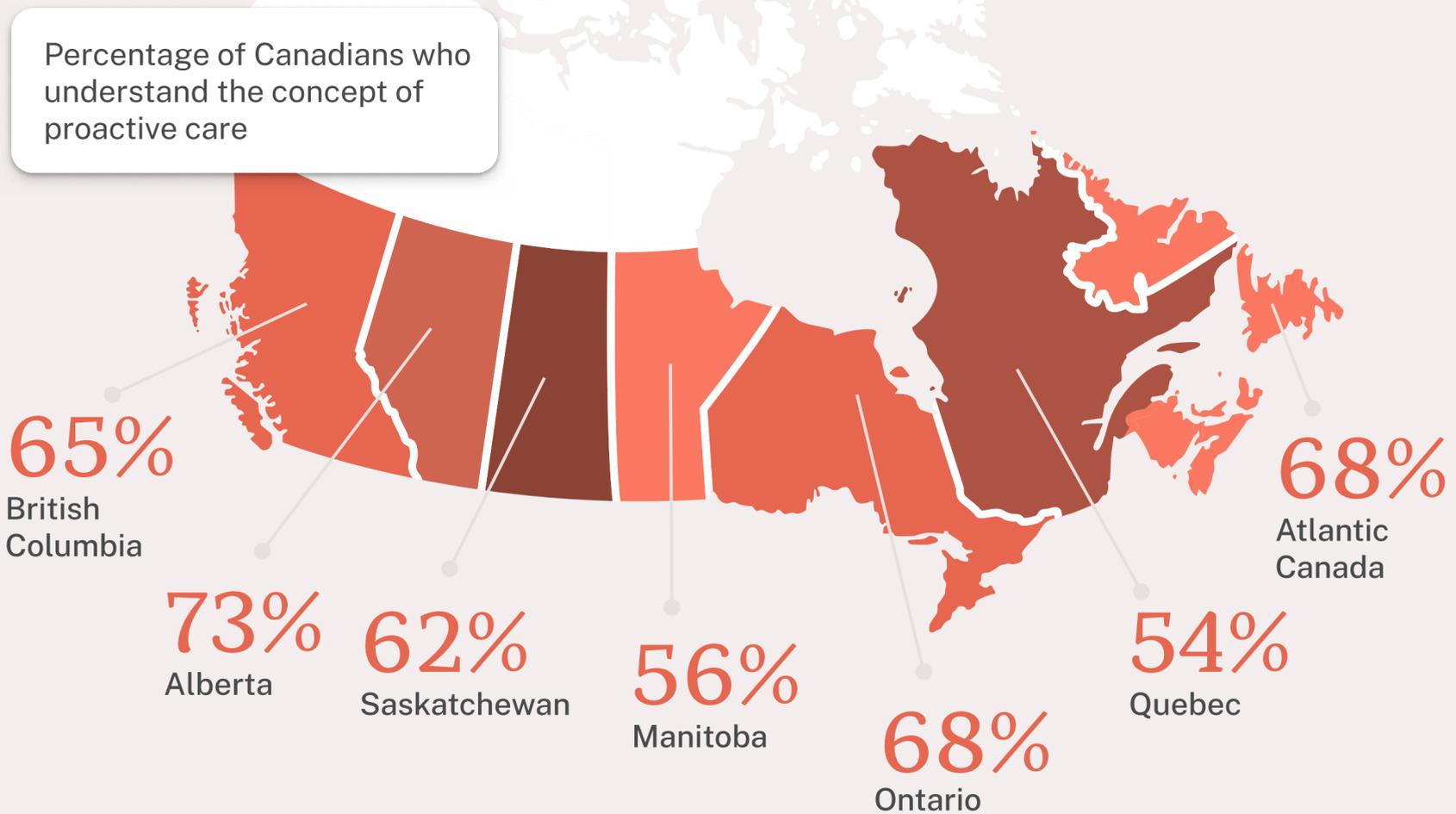
Canada's health system feels out of reach and inaccessible to many Canadians. The survey revealed that many Canadians understand the importance of proactive care. Yet, they're forced to put it off due to an inability to find a doctor or to access the healthcare providers they have.

“ No primary healthcare provider
— no family doctor for six years.
— Survey respondent



Aware, but underserved: Canadians know better care exists

Across all provinces, a majority of Canadians reported they're familiar with care involving routine checkups, testing referrals and preventative treatments.



A loss of control over healthcare

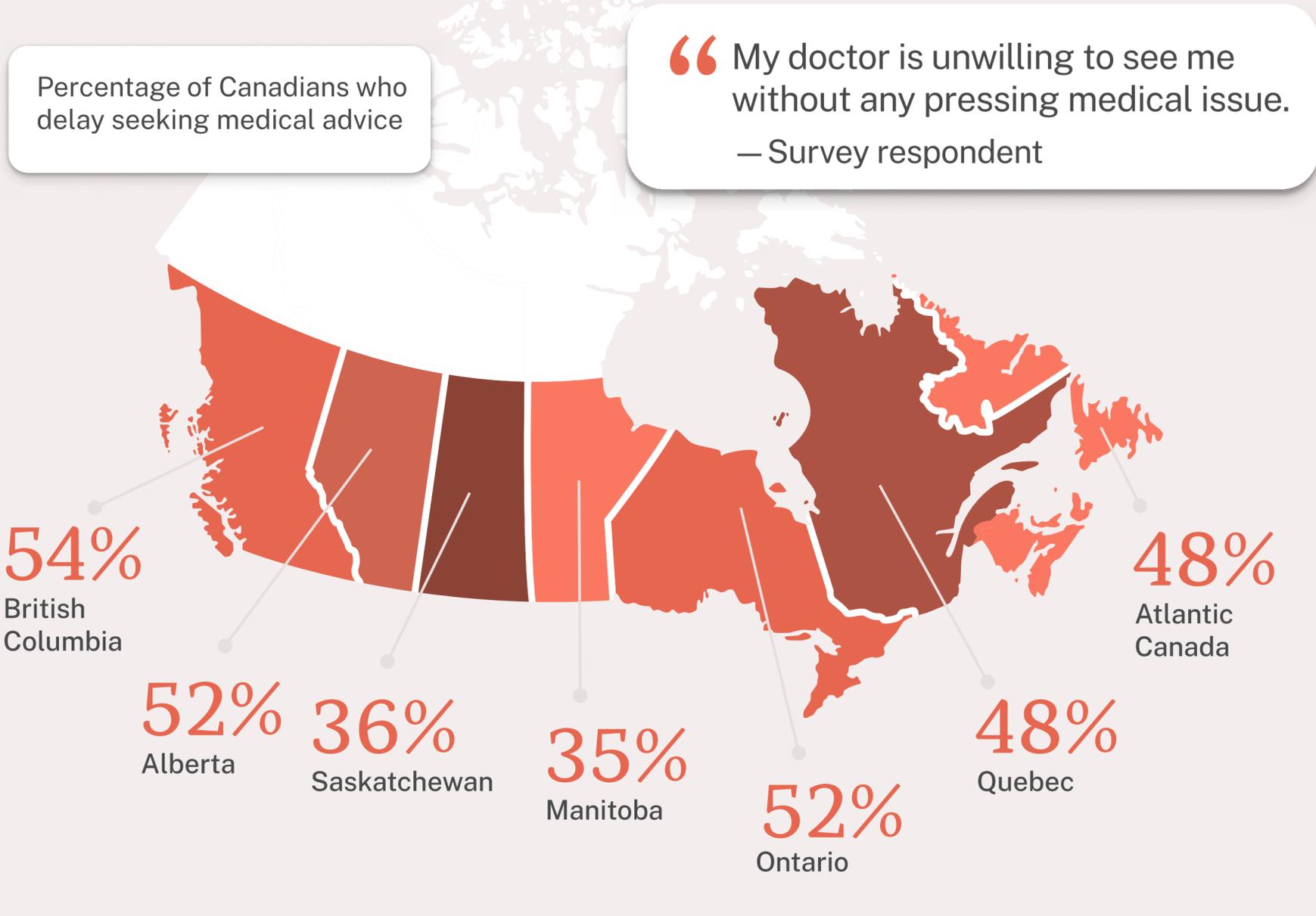
Nationwide, people are delaying getting the medical care they want and need, even when it comes to proactive measures. These delays have led to a troubling trend — the survey revealed that many Canadians feel diminished control over their healthcare journeys.

The delays have also conditioned Canadians into an alarming pattern: postponing medical consultations out of fear of wasting a doctor's time or enduring long wait times.

This leads to delaying care until symptoms become too serious to ignore, often requiring more extensive treatment from specialists that translates directly into significant economic costs.

A risky decision: Canadians **delay seeking** medical advice

Despite the long-term risks, Canadians currently delay seeking care for both physical and mental health concerns.



Hesitation to seek care

If Canadians are so aware of the dangers of delaying care and understand the benefits of proactive and preventative care, why are so many still delaying it?

The vast majority know that the healthcare system is stretched to its limits and don't want to stress it further. Canadians recognize that 60% of family doctors are reporting declining mental health due to stress, with more than half considering reducing their clinical hours and some retiring without enough new doctors to fill the gaps.⁶ In this challenging landscape, Canadians are increasingly taking it upon themselves to either self-diagnose or alleviate pressure on the system by avoiding care altogether.



The healthcare system should serve Canadians, **not leave them fending for themselves**

Canadians are carrying the weight of the system when pursuing care

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I've more or less given up on ever receiving proactive care, and feel I'm compelled to wait until I become seriously ill or injured before receiving medical care of any kind.

— Survey respondent



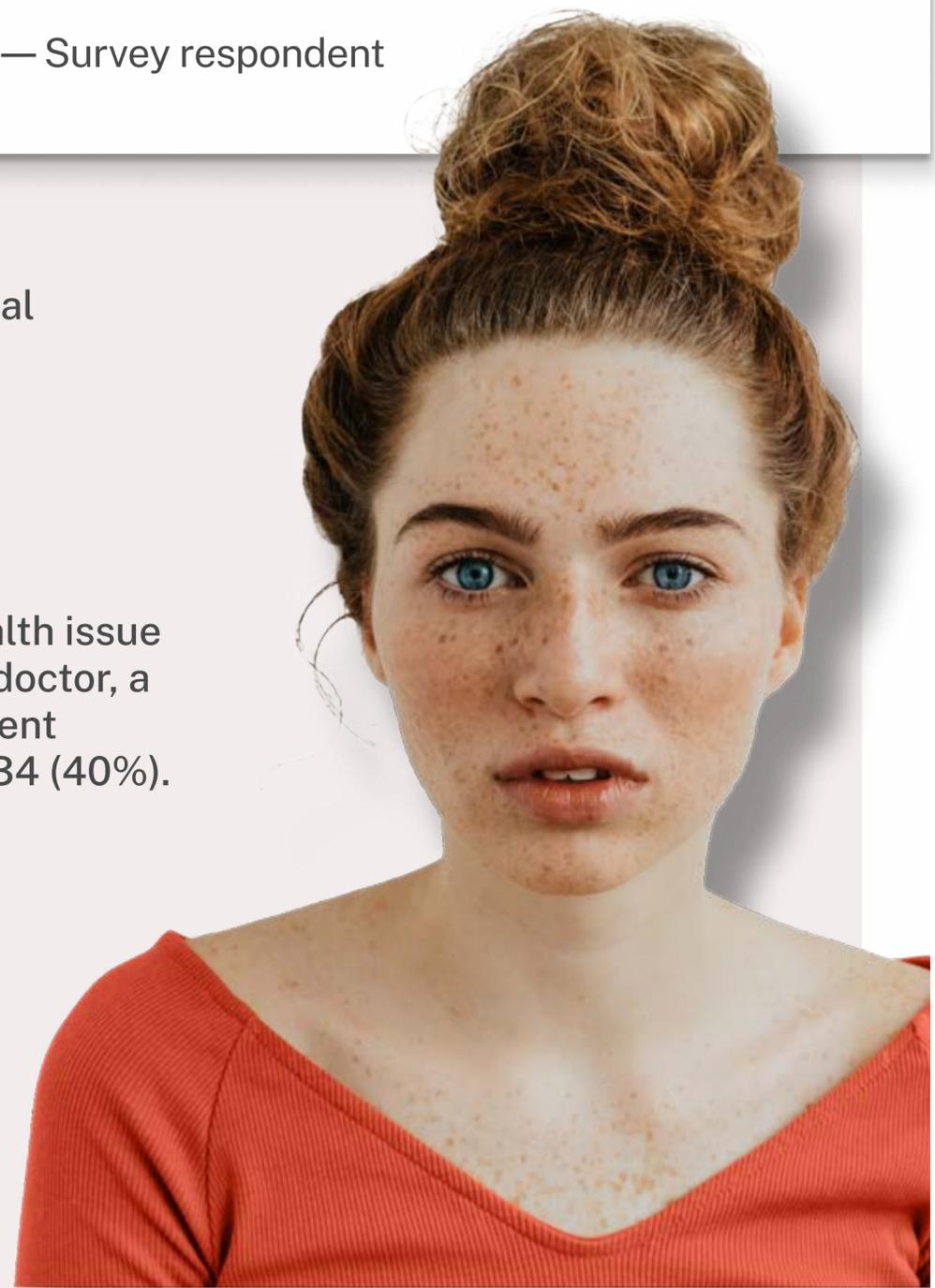
50%

of Canadians delay seeking medical advice despite physical or mental health concerns.



29%

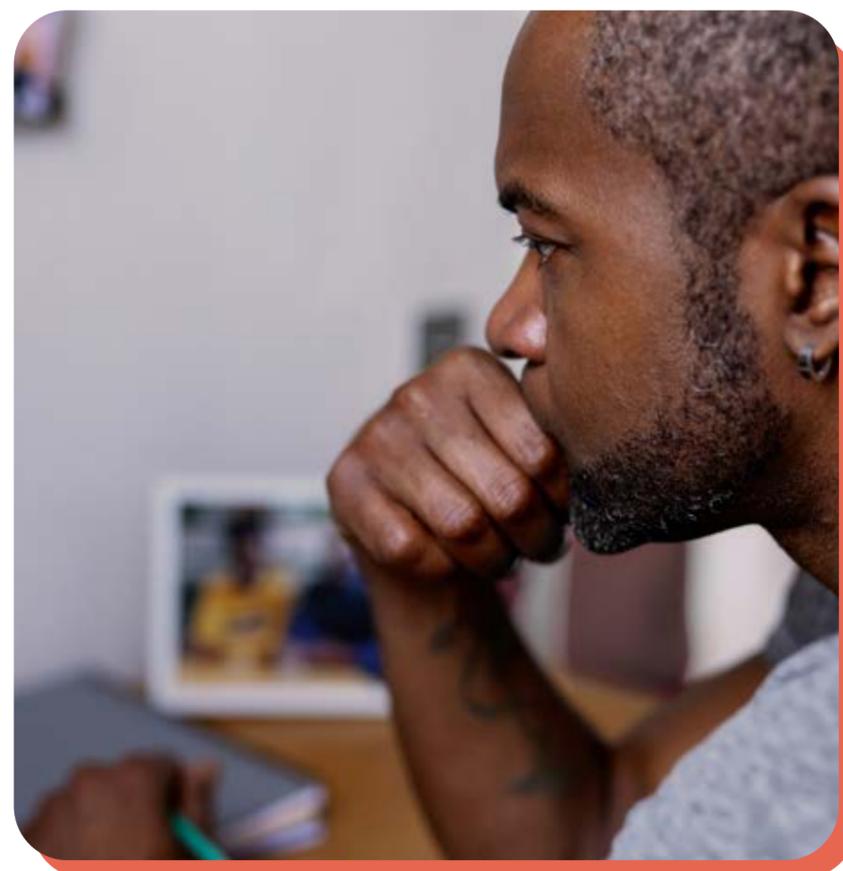
of Canadians believe their health issue isn't serious enough to visit a doctor, a perception particularly prevalent among Canadians aged 18 to 34 (40%).



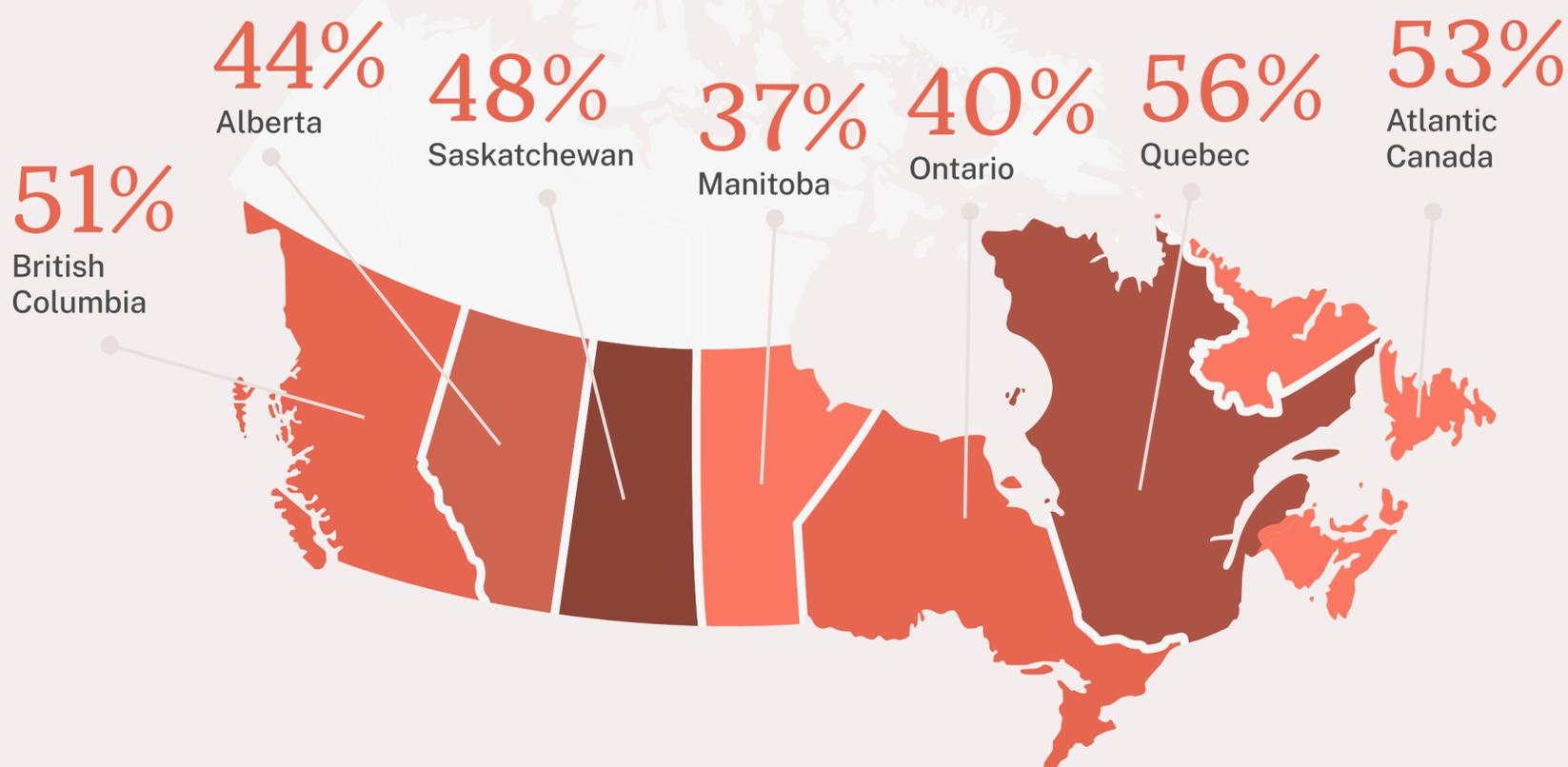
Access denied: Canadians feel **frustrated** when navigating the healthcare system

When Canadians do seek out proactive care, they don't find navigating the system easy. Many survey respondents expressed frustration with struggling to find doctors accepting new patients.

Nearly half of Canadians say it's challenging to access proactive healthcare services and three in four Canadians want increased access to a doctor or medical practitioner. This disparity has created a gap between the strong desire for increased access and the ability to find the care they seek.



A significant proportion of residents in all provinces reported that they felt it was challenging to access proactive care

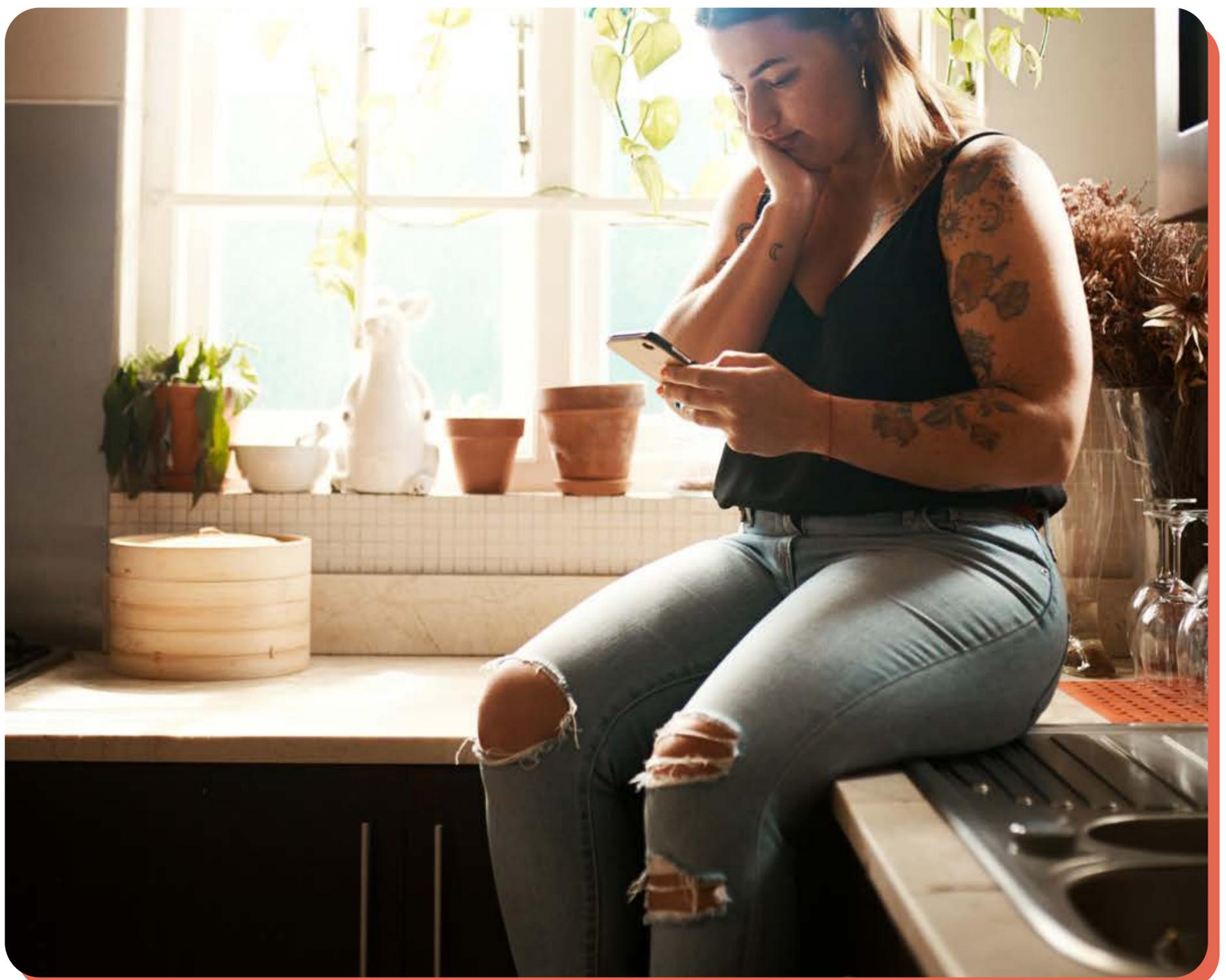


Paging Dr. Google: The **dangerous shortcut** Canadians take with their health

Thanks to technology, Canadians have become accustomed to accessing services quickly, conveniently and with a sense of control in most aspects of their lives. However, healthcare remains an exception. They still have to make phone calls to set up appointments, spend hours in waiting rooms and fill out paper forms.

Faced with these obstacles when seeking primary care and the challenges of getting timely medical advice from licensed providers, many Canadians are turning to the tools they have at hand to look for answers on their own.

The survey revealed that more than three in four Canadians have used Google to address serious health concerns instead of consulting a healthcare professional. While this isn't a substitute for real medical advice, it fills a critical need for people who want to understand their health better and determine whether their symptoms require further investigation, diagnosis or treatment.



For women, researching symptoms online is even more common



77%

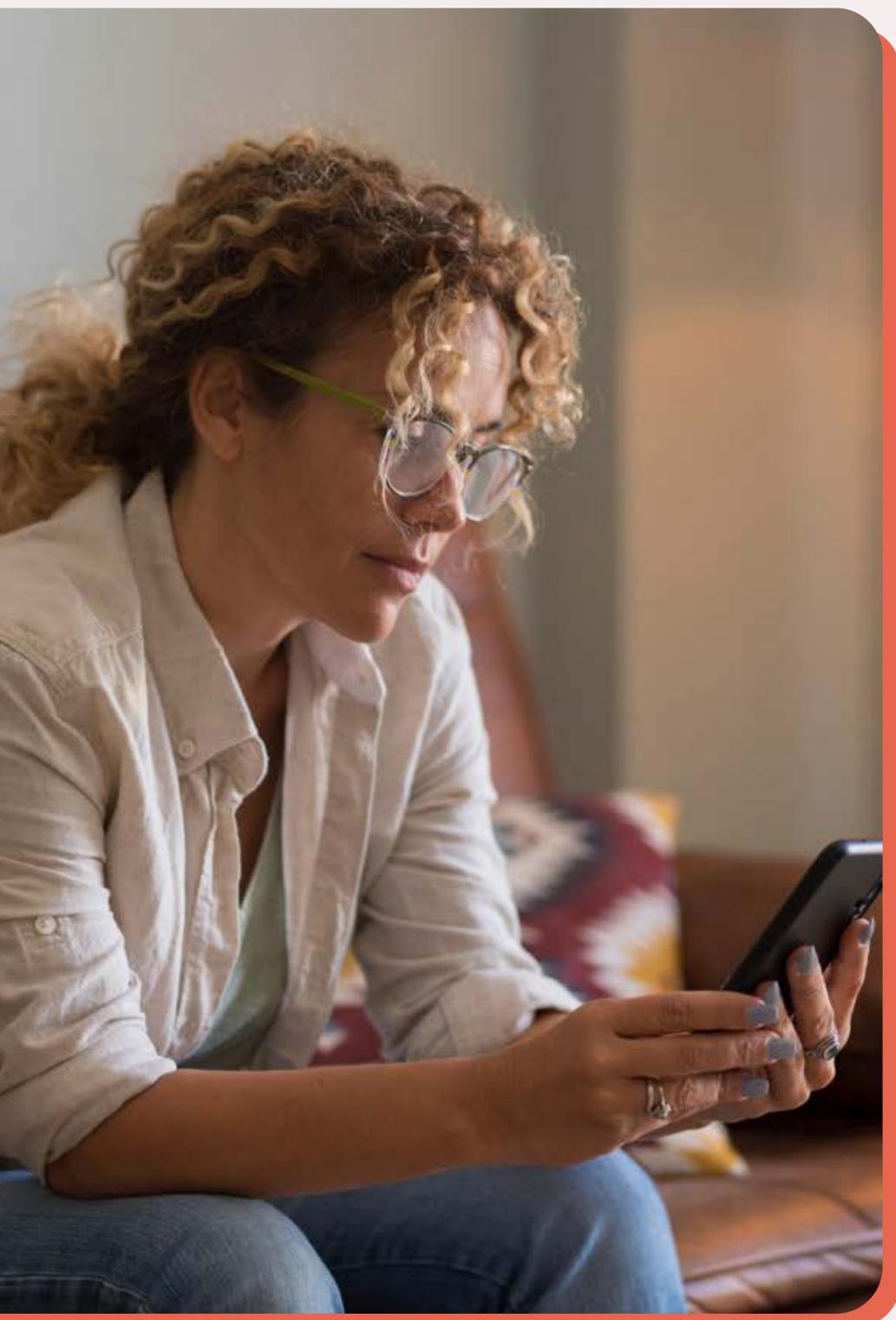
of Canadians have used Google to check serious health symptoms instead of consulting a healthcare professional.

Among women, this number rises to

82%

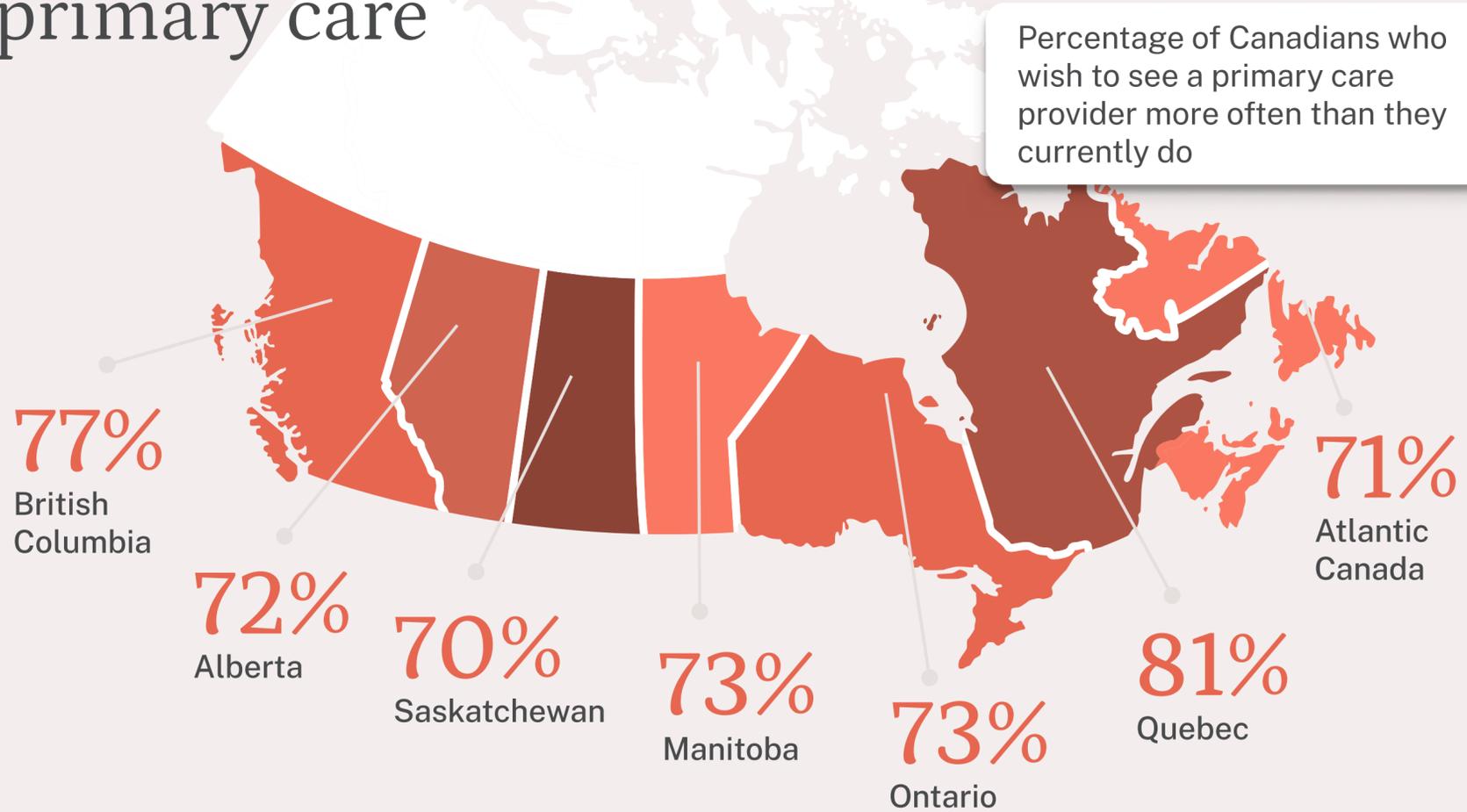
Despite the convenience, medical information found through Google isn't only potentially misleading but also generic, failing to account for the specific details of an individual's health condition. A study by Edith Cowan University examined the quality of medical advice on free websites and online symptom checkers. The study found that these sources, commonly surfaced by search engines like Google, provided a correct diagnosis only 36% of the time, and only 52% of the time within the top three results.⁷

This exposes the danger of online medical misinformation, highlighting the growing need for accessible, personalized medical care that Canadians can trust.



Canadians aren't getting the care they want:

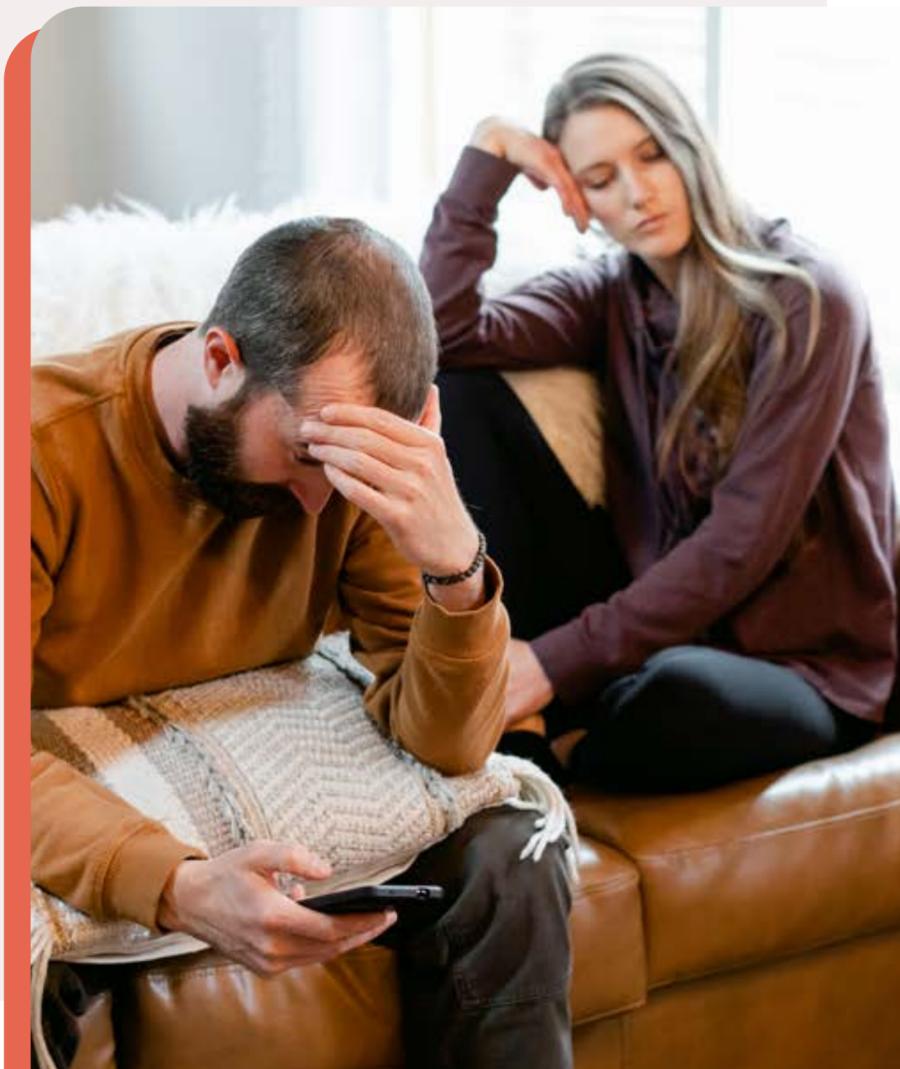
Coast to coast, Canadians demand more access to primary care



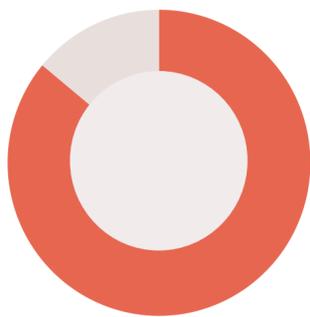
The trend of researching health symptoms online reflects Canadians' desire for quick and easy access to medical guidance. It's clear they want to be proactive about their health, but they aren't equipped with the right tools to do so.

Primary care providers are a crucial first point of contact for accessing proactive care services as they can build a long-term relationship with patients based on their health history, answer questions on health concerns and provide referrals to specialist services. If primary care providers are the front door to the healthcare system that helps Canadians navigate the system effectively, not having timely access to a primary care provider will have a cascading impact on care across the system.

From coast to coast, Canadians overwhelmingly seek more access to primary care providers. The survey showed that, regardless of where they live, Canadians frequently feel a lack of control regarding their healthcare. This sense of helplessness is particularly pronounced among younger Canadians, with 57% of those aged 18 to 34 reporting a diminished sense of control, compared to 36% of Canadians aged 55 and older. When Canadians feel disconnected from their own healthcare, it discourages them from seeking proactive care, contributing to poorer health outcomes and further straining an already overburdened system down the line.

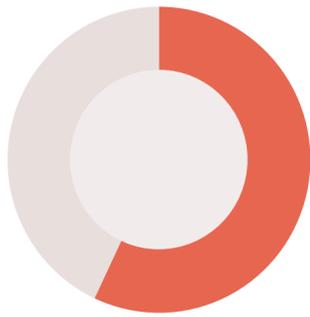


46% of Canadians don't feel in control of their health



86%

of those feeling a lack of control wish to see a doctor more often.



57%

of those aged 18 to 34 report a diminished sense of control.

“

Our healthcare is in extreme crisis and it's **incredibly challenging to navigate.**

— Survey respondent



Diving deep: The unique **challenges** of young Canadians

While Canada's public health system doesn't charge patients a fee to access essential care, it doesn't mean there aren't significant costs associated with accessing care.

Financial strain, inconvenient access and long wait times may lead young Canadians to avoid seeking medical support, posing serious risks to their long-term health.

When they have health concerns, 64% of young Canadians (18 to 34) delay seeking medical advice — the highest out of any age group. In fact, 28% of young Canadians said they feel deterred from seeking medical support unless it's absolutely necessary.

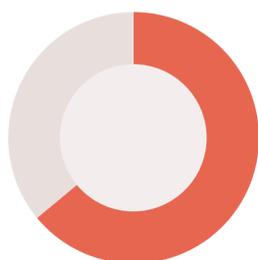
Compared to other demographics, young people are less likely to have a primary care provider⁸ and more likely to work hourly jobs. This makes timely access to care even more challenging, as taking time off work for a half-day appointment or visit to the ER — where those without family doctors may turn for care — can result in losing an entire day's wages. As a result, some choose to avoid care altogether.

A common feeling among young Canadians is that there are challenges to accessing proactive care. Almost all (92%) say they've faced barriers, compared to 69% of Canadians aged 55 and older.

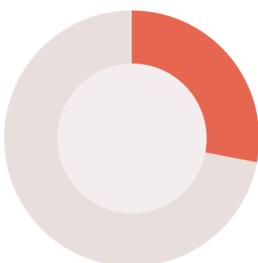
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I have to take time off work because I work longer hours than the doctor and the same Monday to Friday schedule. **I also need to let work know two weeks or more in advance to take time off.**

-Survey respondent



64%
of young Canadians (18 to 34)
delay seeking medical advice.



28%
of young Canadians said they
feel deterred from seeking
medical support unless it's
absolutely necessary.



Dissuaded and delayed: Women value proactive care, **but access challenges remain**

While Canadians at large face hurdles in accessing care, women are disproportionately affected, with their experiences often discouraging them from seeking proactive treatment, even when they recognize a health issue.

Gender bias within the healthcare system significantly impacts the quality of care women receive. Studies show that women are more likely to report severe, long-lasting pain but are often denied pain relief and treated with less aggression than men. This discouragement can lead women to delay seeking care.

For those struggling with painful conditions, diagnosis can take years. A 2020 study published in the *Journal of Obstetrics and Gynaecology Canada* found that Canadian women wait an average of five years for diagnosis and treatment of endometriosis, a debilitating condition where the uterine lining grows outside the uterus.¹⁰

These negative experiences contribute to long-term health consequences for women. Research from Women's College Hospital shows that while mortality rates for heart disease are improving for most groups, this isn't the case for young women.¹¹ By age 80, the number of women with two or more chronic conditions is double that of older men.

“ I've been waiting three years to get a new family doctor. I've phoned urgent care centres and emergency departments and simply been **told 'no' when asking if proactive care was possible.**

— Survey respondent

The persistent gender bias in healthcare means that women struggle to access timely and effective care when needed and feel disempowered from seeking proactive care. The survey further highlights these challenges, revealing that women are more likely than men to be discouraged from seeking support unless absolutely necessary. They're also more likely to report having previous negative experiences with healthcare providers.

Despite biases in medicine and challenges accessing care, the survey showed that Canadian women see proactive care as a higher priority than men, with 79% saying it was a high or moderate priority, compared to 69% of men. While women place a strong emphasis on proactive care, systemic barriers such as gender bias, delayed diagnoses and negative healthcare experiences prevent them from receiving the timely, effective care they need, leading to serious long-term health consequences.



of Canadian women delay seeking medical advice despite concerns, compared to 45% of Canadian men.



of Canadian women feel dissuaded from seeking support unless necessary, compared to 15% of Canadian men.

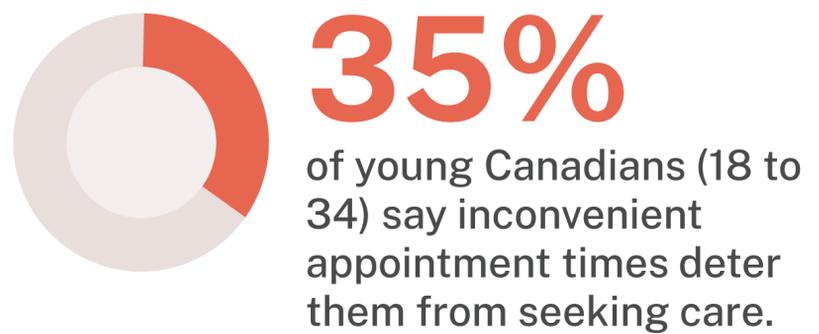


of Canadian women say they've had negative experiences with healthcare providers, compared to 10% of Canadian men.

The hurdles Canadians face getting healthcare

So, what's stopping people from accessing the proactive care they want? The most common barriers are long appointment wait times and limited healthcare provider access.

For young Canadians, inconvenient appointment times are also a deterrent — reflecting the challenge of accessing care outside working hours.



A look ahead: Investing in a proactive future

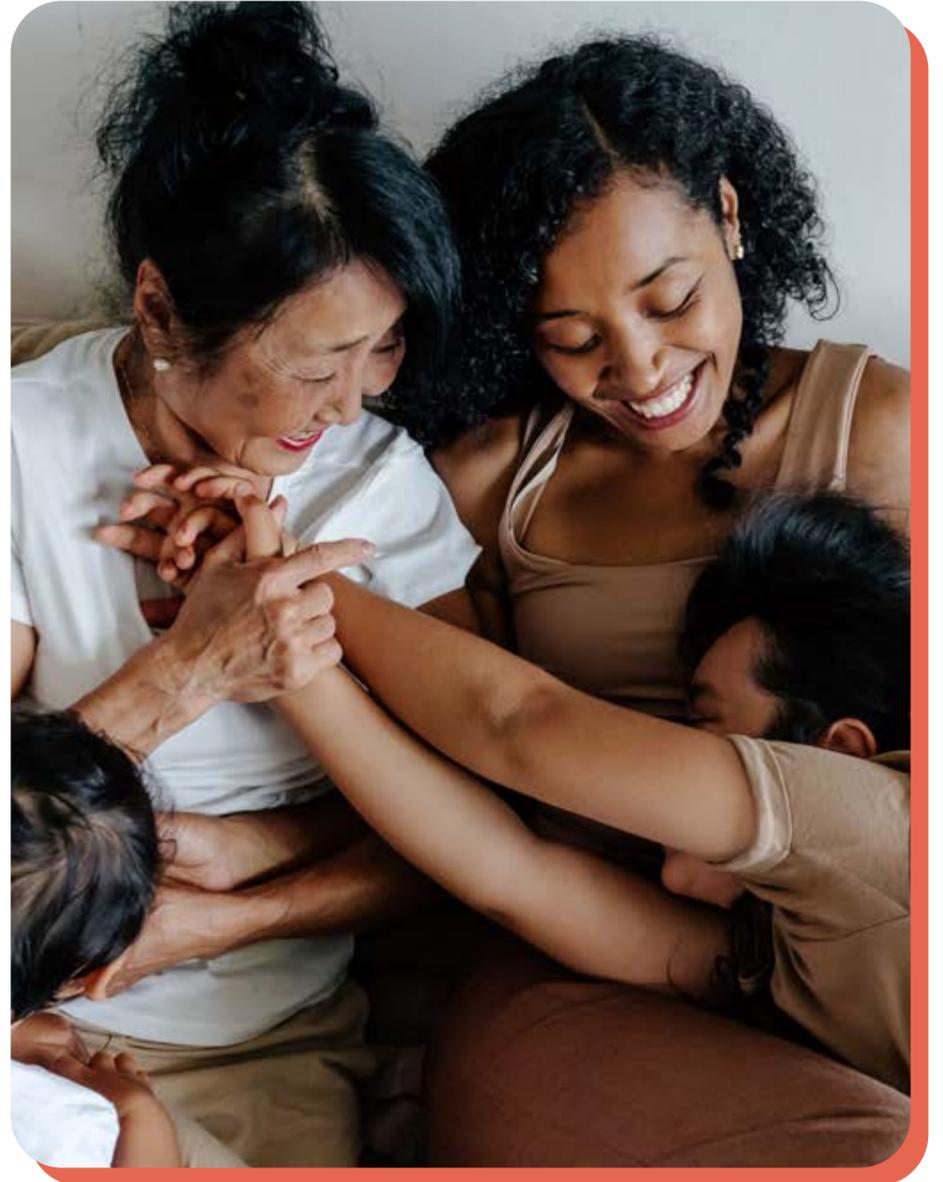
Our findings demonstrate that Canadians want and need proactive care options, highlighting a critical opportunity for the Canadian healthcare system.

Proactive care isn't just a preference — it's a necessity that Canadians are calling for. However, long wait times, limited appointment availability and barriers to accessing primary care providers have made it difficult for individuals to engage in proactive care.

We'll need to adopt innovative technology in healthcare to bridge this gap and make care more efficient, accessible and personalized. Automating processes like health reminders and medical data sharing can enable patients to receive many elements of proactive care without the need for an appointment. At the same time, using digital platforms for triaging and scheduling, coupled with wider availability of virtual primary care, can solve many of the access challenges for those cases where appointments are required.

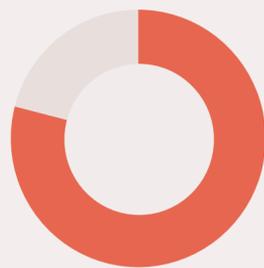
Eliminating access barriers to proactive care has the power to enable a sweeping shift in Canadian healthcare. This shift can lead to a healthier population, freeing up healthcare system resources to address the most unavoidable illnesses. At the same time, fewer preventable illnesses translate to a more resilient and productive workforce, benefiting both individuals and the broader economy.

Embracing proactive care is a win-win for Canadians and the economy alike. By leveraging technology and prioritizing patient-centred approaches, we can build a stronger and more sustainable healthcare system for all.



74%

of Canadians prioritize proactive care.



79%

of women emphasize its importance.



62%

of young Canadians recognize proactive care as vital.

About Maple

Maple's virtual care platform addresses Canada's healthcare challenges by providing convenient, high-quality care. Founded in 2015 by a Toronto ER physician, Maple offers 24/7 access to primary care providers and direct access to specialists for appointments. With over five million Canadians served — including all Nova Scotians through a provincially-funded virtual care program launched in November 2023 — the platform also offers proactive care screenings and connects patients to a network of 2,000 providers. Maple further provides custom solutions for employers and insurers. More information is available at getmaple.ca.

Survey methodology

These findings are from a survey conducted by Maple from August 7 to August 9, 2024, among a representative sample of 1,510 online Canadians who are members of the Angus Reid Forum. The survey was conducted in English and French. For comparison purposes only, a probability sample of this size would carry a margin of error of +/-2.53 percentage points, 19 times out of 20.

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