

16th Annual National Report Card on Health Care

August 18, 2016

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2016 National Report Card:

Canadian Views on the New Health Accord
July 2016

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Introduction

These are the findings of the Canadian Medical Association's (CMA) 16th annual National Report on the Health Care System in Canada. Since 2001, the CMA has asked Canadians to assign letter grades to their healthcare system overall and to a number of key aspects of the system. In addition, each year the National Report also examines a specific area of the healthcare system. This year, Canadians were asked a series of questions about their views concerning the Federal, Provincial and Territorial Governments' negotiations in the lead up to a new national Health Accord.

Methodology

From July 22nd – 27th, 2016, Ipsos surveyed a nationally representative sample of 1,286 Canadian adults (18 and over) online. An oversample was also conducted to achieve a total sample of n=400 residents in British Columbia.

The precision of Ipsos online polls is measured using a credibility interval. In this case, the sample of n=1,286 Canadian adults is accurate to within +/- 3.1 percentage points, 19 times out of 20.

The data was weighted by region, age and gender to ensure that the sample accurately reflects the population according to Census data.

Key Findings

In 2004 the leaders of the Federal and Provincial/Territorial Governments held a three-day meeting to negotiate a long-term funding agreement covering health care services in Canada. At the time, health care was considered the most important issue facing Canada's leaders by 63% of Canadians - far ahead of the economy/unemployment at 15% (October 2004, an open ended question). Part of the session was televised and the result was a 10-year health accord.

In 2011, the Federal Minister of Finance pre-empted discussion among health ministers by announcing a change in the funding agreement two years before the health accord expired at the end of 2013. In last year's election the Liberal Government promised to negotiate a new long-term agreement with the provincial and territorial governments. With this history as the backdrop, we asked Canadians about their priorities for a new long-term agreement on health.

Surprisingly, given that health care still sits as the highest priority issue for Canadians at 42% - ahead of unemployment and jobs at 34% (July 2016, in responses to prompted issues) only 15% of Canadians say that they are aware of the upcoming discussions between their governments. However, not being aware doesn't mean that Canadians don't have some firm opinions on the likely success of the discussions and on the priorities for health care moving forward.

Indeed, half of Canadians are confident (vs 40% who lack confidence) that their governments will actually be able to reach a new long-term funding agreement covering health care services in Canada. In a not-so-ringing endorsement, confidence drops six points to 44% when asked if they think the agreement will actually result in a better healthcare system.

When it comes to what should be priority areas to focus on in the next health accord, Canadians seem fairly united, however, their views differ somewhat from the Federal Government's stated intentions. The Federal Government has noted that it would like to see 'transformative improvements' made to the healthcare system, including new investments in home care, a commitment to help coordinate bulk prescription drug purchases by the provinces and new investments in mental health. While these initiatives are all strongly supported by Canadians, a majority of Canadians feel that the current system needs to be shored up before new initiatives and any modernization is put forward. Over half of Canadians (55%) indicate that any new money should be spent on fixing existing healthcare services rather than investing in efforts to modernize and transform the healthcare system (45%), and this sentiment increases in strength (70% fix the current system) among Canadians who have had more interactions with the healthcare system (more visits to hospital, visits to ER, etc.).

When asked in an open ended question for the one thing the Federal Minister of Health should do to transform the health system to meet the future needs of Canadians, the top response was to increase the availability of doctors (14%), followed by increasing funding (9%) and decreasing wait times (9%). When presented with a list of possible items and asked how important it is that they be included in a new long term health care funding agreement, Canadians prioritized an improved prescription drug plan (58% ranking it first, second or third), a strategy for seniors' health (54%), improved mental health services (51%) and more homecare (47%). While Canadians have prioritized an improved prescription



drug plan, opinions on split on the benefits of such a program – extended coverage, or lower drug prices.

There has been much debate and discussion over the last few years about the impact of Canada's aging population on the health care system, and as a result 74% of Canadians support a change in the overall funding agreement that would see a system where the provinces with older populations would receive more money to deal with the pressures placed on them by an aging population.

Finally, when it comes to a new health accord, a majority of Canadians (67%) agree that the Federal Government should identify common indicators for reporting requirements for each province/territory to encourage accountability and that new funding should be made contingent on these reporting requirements (60% agree).

Despite the high level of concern, and perhaps one of the reasons for the low level of attention being paid to the health care accord negotiations, is that Canadians generally give the healthcare system higher grades than they have in the past.

Today 37% of Canadians assign a letter grade of A to the overall quality of health care services available to them and their families compared to 32% in 2015. Canadians also give higher marks this year than in previous years to their ability to access a family doctor in their community (36% giving an A grade), to wellness/preventative care (25%), to healthcare services for seniors (24%) and home healthcare services (20%).

Not only do they give current services stronger marks but they are more optimistic about the future, with 42% of Canadians saying that health care services in their community will get better over the next two or three years (35% in 2015) compared to 43% who think it will get worse (47% in 2015).

All in all, the Federal, Provincial and Territorial governments enter their negotiations with a public environment that is best characterized as cautiously optimistic, in agreement on areas that require the greatest attention going forward, but of the view that there are gaps in the current system that need to be filled before the business of transformation for the future needs of Canadians can begin.

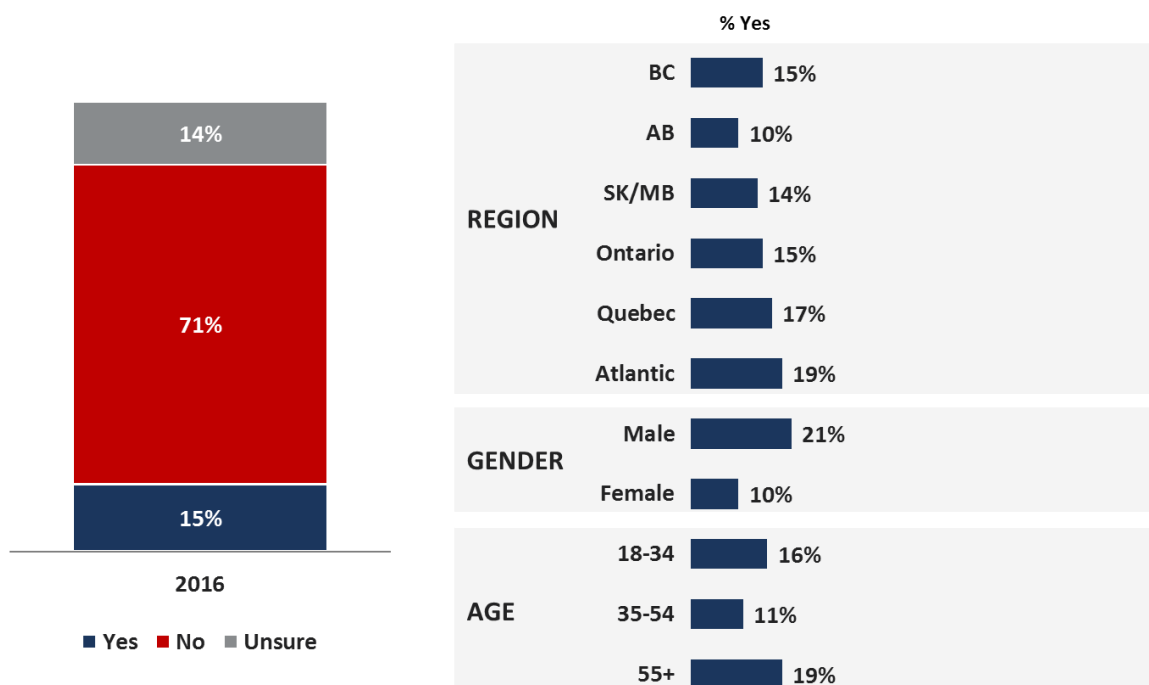
Toward A New Health Accord

Awareness of the new Health Accord

Over one in ten (15%) are aware that the Federal Government has committed to negotiating a new Health Accord, leaving over eight in ten who are unaware (71%) or don't know (14%).

Men are twice as likely to be aware of the new Health Accord (21% vs. 10%). Middle-aged Canadians 35-54 years old (11%) are less likely to be aware than those younger or older. There are no significant regional variations in awareness.

Only 15% of Canadians are Aware of Negotiations and that Health Accord expires in 2017



7. Are you aware that the Federal Government has committed to negotiating a new Health Accord with the provincial and territorial governments before the current accord expires in 2017?

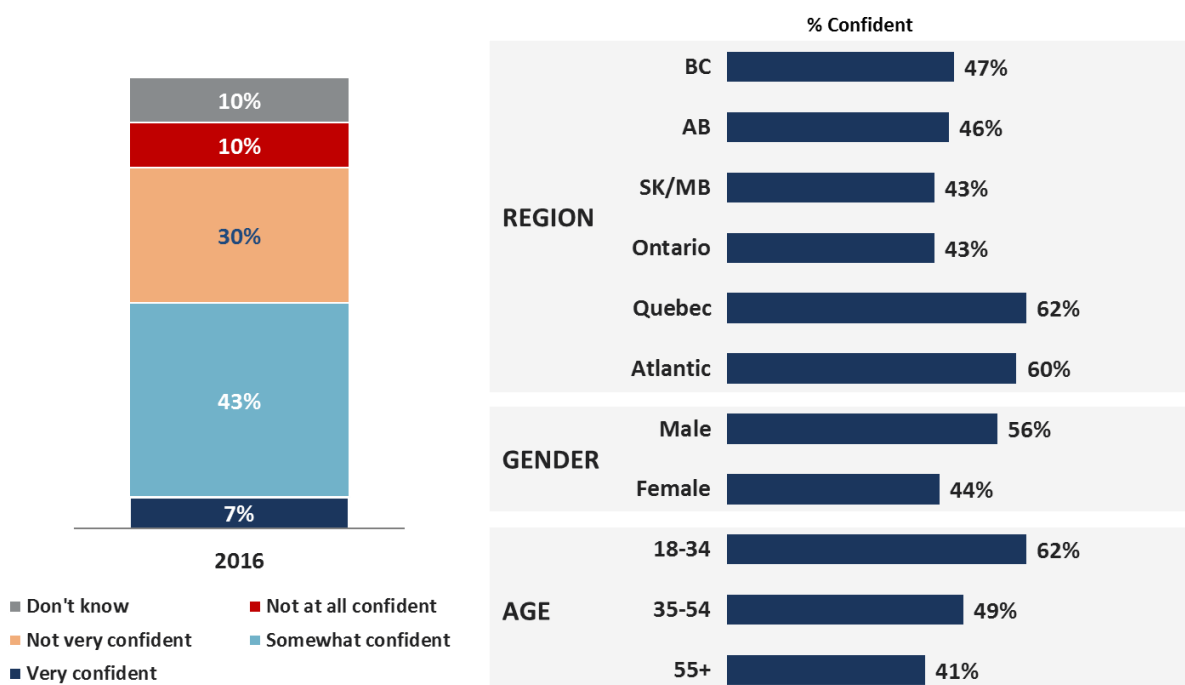
Base: All respondents (n=1286)

Confidence that Governments Will Reach Agreement

Confidence that the Federal and Provincial/Territorial governments will reach an agreement on long-term funding for health care is 'soft', with the proportion indicating they are confident is only slightly greater than those who are not confident (50% vs. 40%).

Confidence decreases with age: six in ten young adults are confident that the governments will reach an agreement, whereas half of middle-aged Canadians are confident, and just four in ten Canadians 55+ are confident. The eastern provinces tend to be more confident and men are more likely to be confident compared to women (56% vs. 44%).

Half of Canadians are Confident that Federal, Provincial and Territorial Governments will reach an Agreement on Long Term Funding



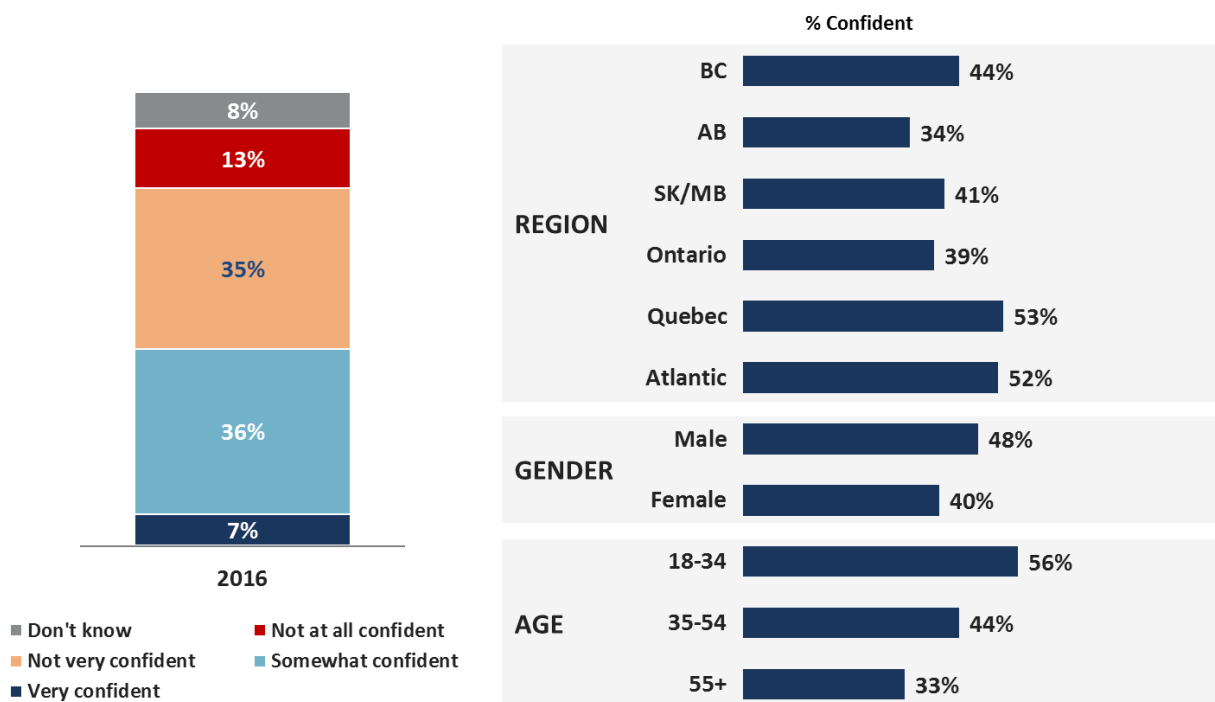
8. How confident are you that the Federal, Provincial and Territorial governments will be able to reach an agreement on new long-term funding for health care?

Base: All respondents (n=1286)

When asked if the new Health Accord will result in a better healthcare system, confidence decreases even further with a similar proportion indicating they are confident (44%) vs. not confident (48%).

The same demographic trend presents itself for confidence that the new Health Accord will result in better healthcare system for Canadians: confidence decreases with age, men are more confident than women, and the eastern provinces are more confident than other provinces/regions.

Confidence drops to 4 in 10 who believe that an agreement on Health Care will result in a better health care system for Canadians

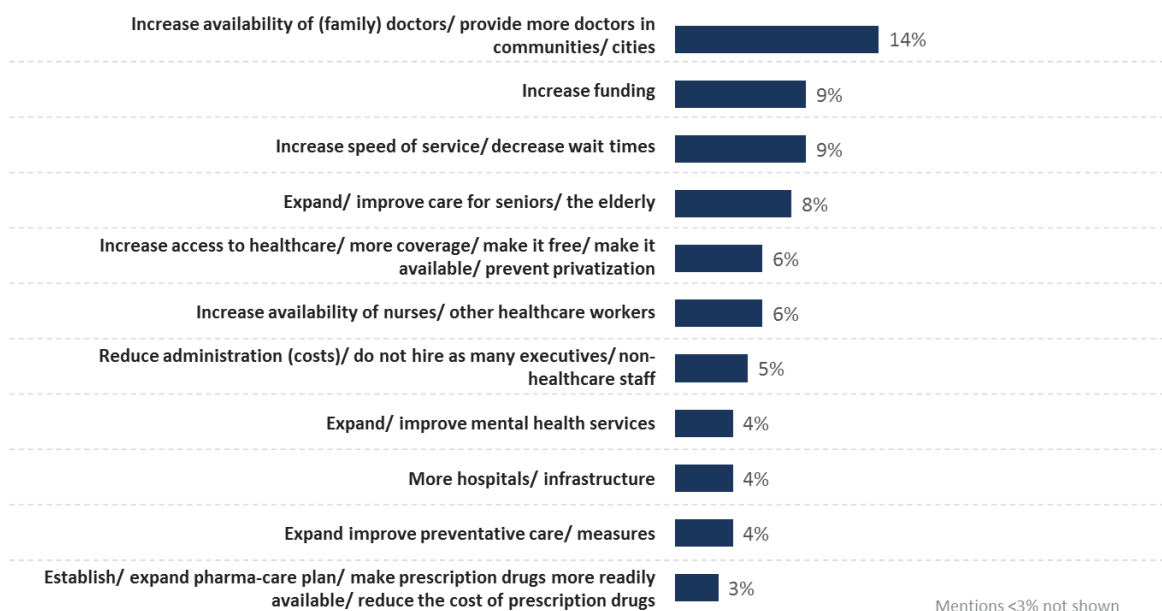


9. How confident are you that Federal, Provincial and Territorial governments will be able to reach an agreement on health care that results in a better health care system for Canadians?

Base: All respondents (n=1286)

When asked to name one thing they would encourage the Federal Minister of Health to do to transform the health care system, Canadians indicate increasing the availability of family doctors (14%) as a top priority. This is followed closely by an increase in funding (9%), decrease in wait times (9%), and expanding services/care for seniors (8%).

More doctors, more funding, shorter wait times and more seniors care top this list when asked what should be done to ensure the health care system meets the future needs of Canadians.



10. If you could encourage the new Federal Minister of Health to do just one thing that would transform the health care system to meet the future needs of Canadians what would that one thing be?

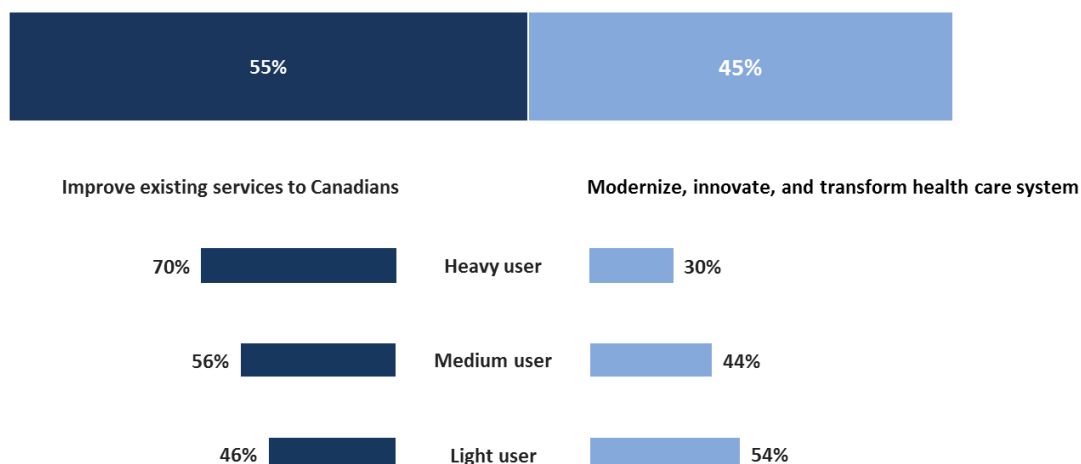
Base: All respondents (n=1286)

More Canadians (55%) are of the opinion that the healthcare system is underfunded, and any new money should be used to improve existing services, and fewer (45%) indicate that any new money should go toward modernization and innovation to transform the healthcare system.

As the degree of interaction with the healthcare system increases (from light user to heavy user), the opinion that new money should be used to improve existing services also increases. In fact, seven in ten (70%) ‘heavy users’ of the healthcare system choose improving the existing system over transforming the system.

More Canadians choose “improve the existing system” than “modernize, innovate and transform” the health care system

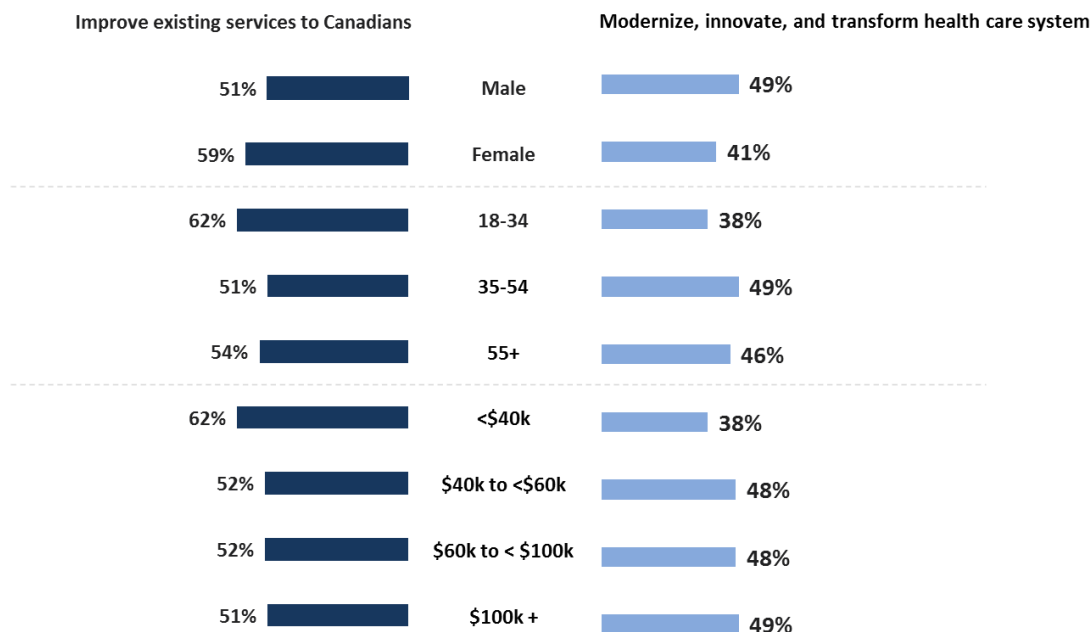
- The health care system we currently have is underfunded and any new money from the Federal Government should go toward improving existing services to Canadians.
- The health care system we currently have is out of date and any new money from the Federal Government should go toward efforts that modernize, innovate and transform Canada's health care system.



17. Which of the following statements is closest to your personal opinion?
Base: All respondents (n=1286)

Women are more likely to choose “improving the existing system” compared to men (59% vs. 51%), as are younger Canadians 18-34 (62%) compared to middle age 35-54 (51%) and older Canadians 55+ (54%). Canadians earning less than \$40,000 per year are at least 10% higher in their choice to improve the system compared to those with a higher income.

Females, younger Canadians (18-34) and those earning less than \$40k are more likely to choose “improve the existing system”



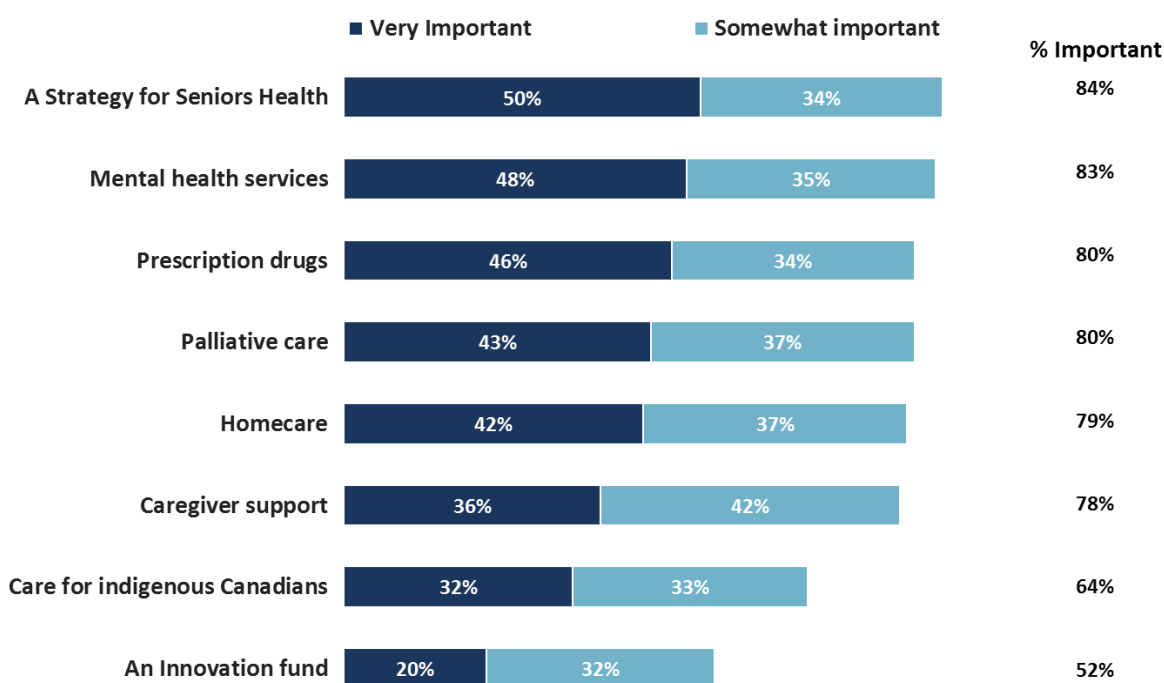
17. Which of the following statements is closest to your personal opinion?

Base: All respondents (n=1286)

Funding Priorities for the New Health Accord

While Canadians consider many aspects of the healthcare system important for funding considerations, there are some areas that are more important than others. The top funding considerations are a strategy for seniors health (84%) and mental health services (83%). This is followed closely by eight in ten who consider prescription drugs (80%), palliative care (80%), homecare (79%), and caregiver support (78%) to be important. Relatively less importance is placed on care for indigenous Canadians (64%) and an innovation fund (52%).

A Seniors Strategy and Mental Health Services Top the List for Funding in a New Health Accord

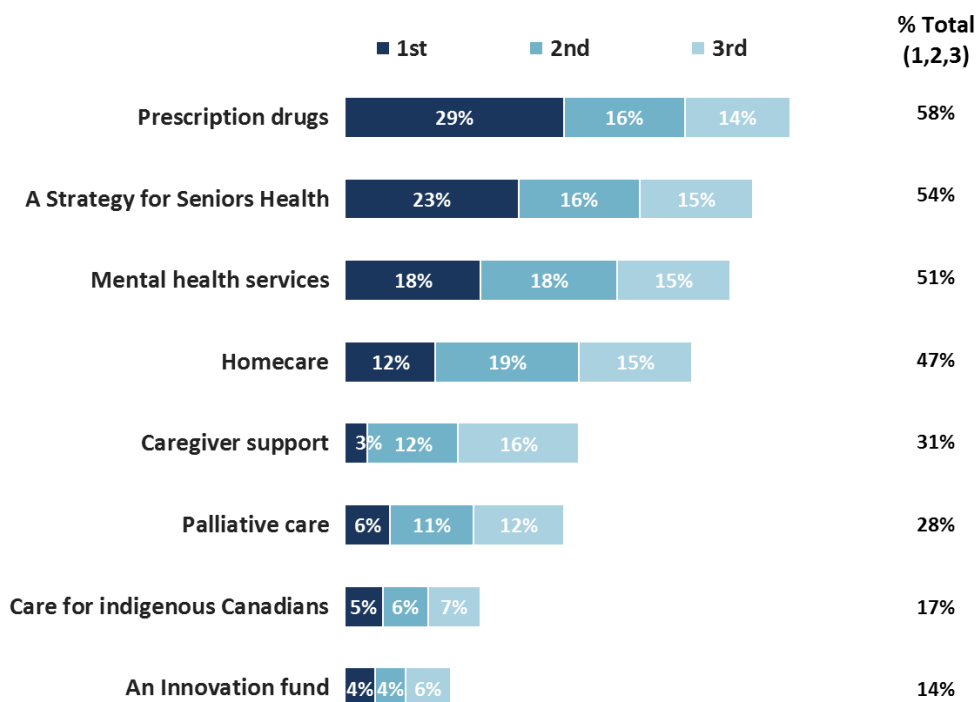


12. How important is it that funding provisions for the following aspects of care be included in a new Health Accord?
Base: All respondents (n=1286)

When asked to rank the initiatives that would truly transform the healthcare system, prescription drugs topped the list along with a strategy for seniors health.

Mental health services were a close third, and homecare the fourth choice pick. Caregiver support, palliative care, care for indigenous Canadians, and an innovation fund were relatively further down the list.

When It Comes To Truly Transforming The Health System, An Improved Prescription Drug Program And A Seniors Strategy Top The List



13. From the list below which initiative do you think is required the most to truly transform the health system in Canada? And which would you say is second most important? And which would you say is the third most important?

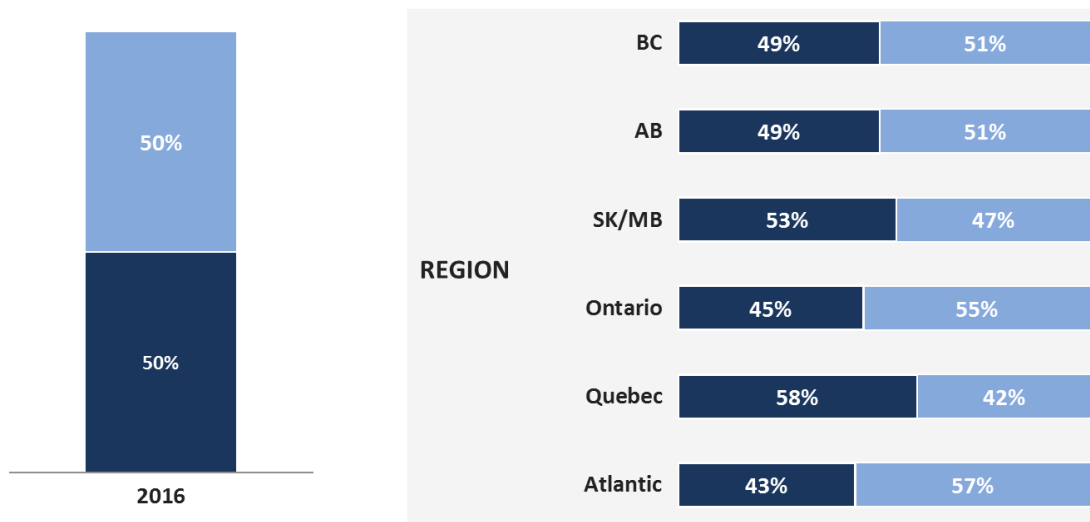
Base: All respondents (n=1286)

In terms of a publicly-funded universal drug program, Canadians are split on the main benefits of the proposed program – either to extend prescription coverage to those who don’t have it, or to lower drug prices.

Residents in Quebec are more likely to view the advantage of a universal drug program as lowering drug prices, on the other hand, residents of Ontario and the Atlantic are more likely to say extended drug coverage.

Canadians Are Split Between The Main Advantage Of A Universal Drug Program. Quebecers Are More Likely Than Those In Ontario And Atlantic To Agree Lower Drug Prices Is The Main Advantage.

- Some people say that the main advantage of such a program is that it would provide lower drug prices because all provinces would work together and purchase large quantities of prescription drugs.
- Other people say that the main advantage of such a program is that it would extend prescription drug coverage to those Canadians who do not have it.



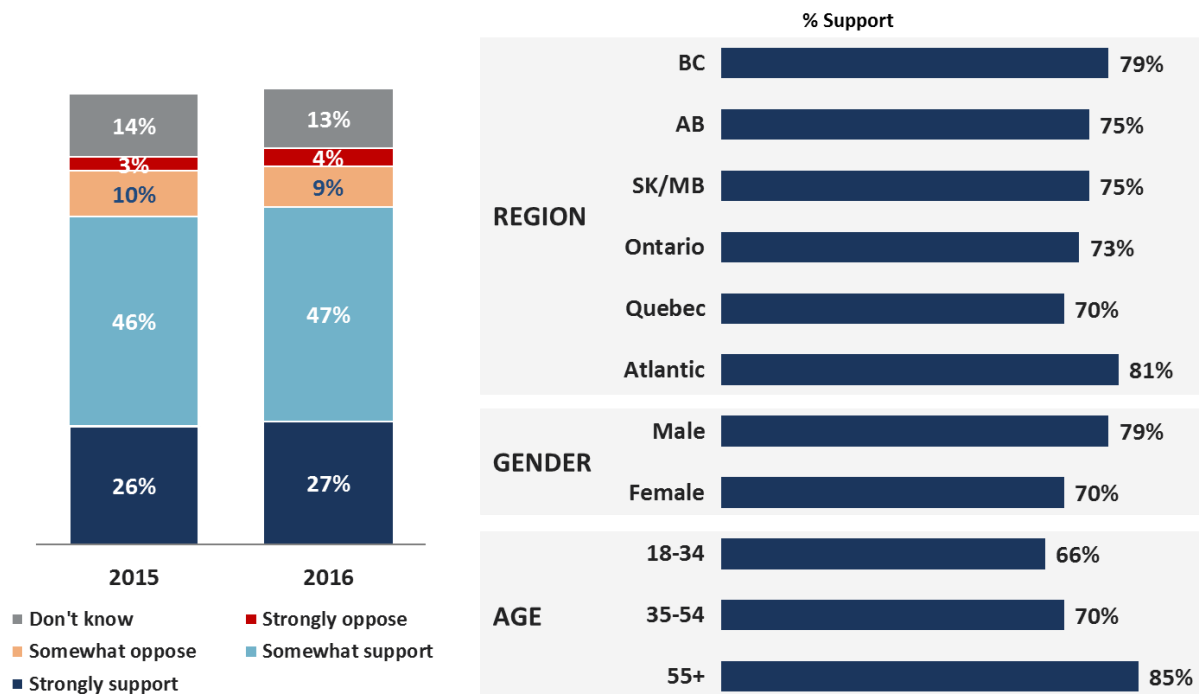
18. Various proposals have been put forward for a government-sponsored and publicly funded prescription drug program. Which of the following statements is closest to your personal opinion?

Base: All respondents (n=1286)

Three quarters (74%) of Canadians support the Federal Government providing additional healthcare funds to provinces based on the age of their population, unchanged from 2015.

Support for a funding system based on the age of a provinces population increases with age: over eight in ten Canadians 55+ support this measure compared to seven in ten middle-age Canadians, and only two thirds of younger Canadians. Men are also more likely to support this type of funding system compared to women (79% vs. 70%).

Close To 3/4s Of Canadians Support A System Where Provinces With Older Populations Receive More Money



5. The federal government currently transfers health care funds to provinces based on the overall population of the province. Would you support or oppose providing additional funding to provinces based on the age of their population, so that provinces with an older population receive more money?

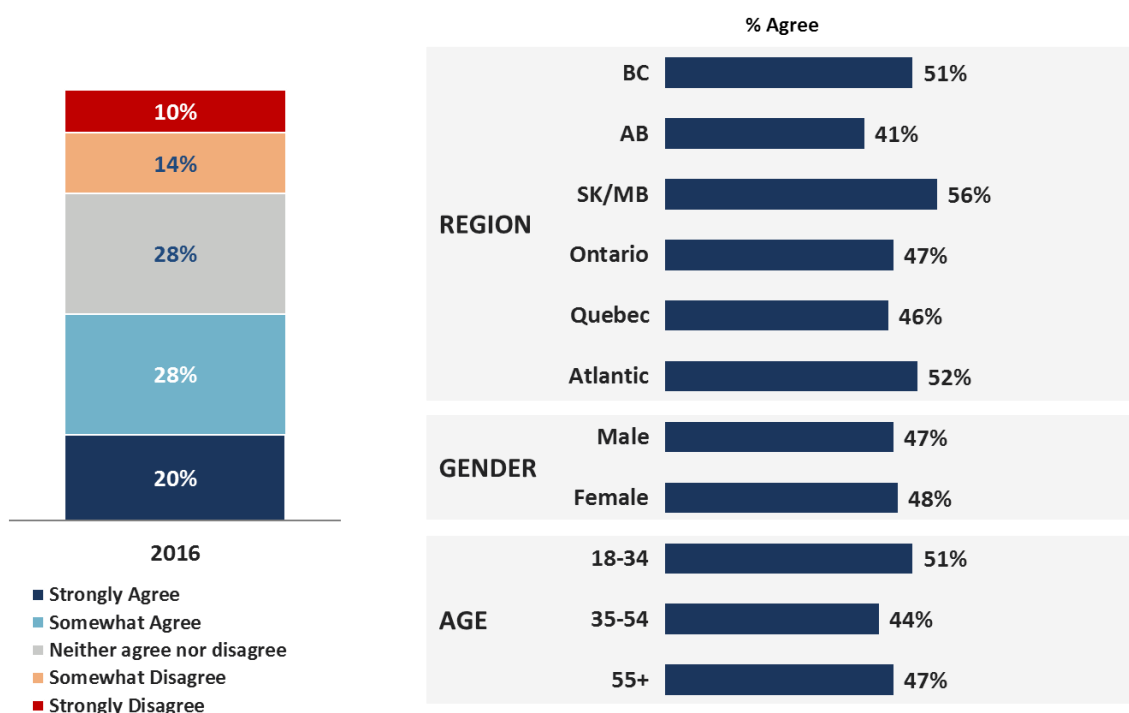
Base: All respondents (n=1286)

Reporting Requirements and Technology & Health Under the New Health Accord

Half of Canadians (47%) agree that people should be able to access health records, book appointments, via their mobile phone or tablet. A notable three in ten (28%) neither agree nor disagree with this statement, indicating a general uncertainty about system access via mobile phone or tablet.

There are no statistical differences by demographics, including age.

Half Of Canadians Agree That They Should Be Able To Access Health Records, Book Appointments, Renew Prescriptions, Review Findings Of Tests, Etc. Via Mobile Phone



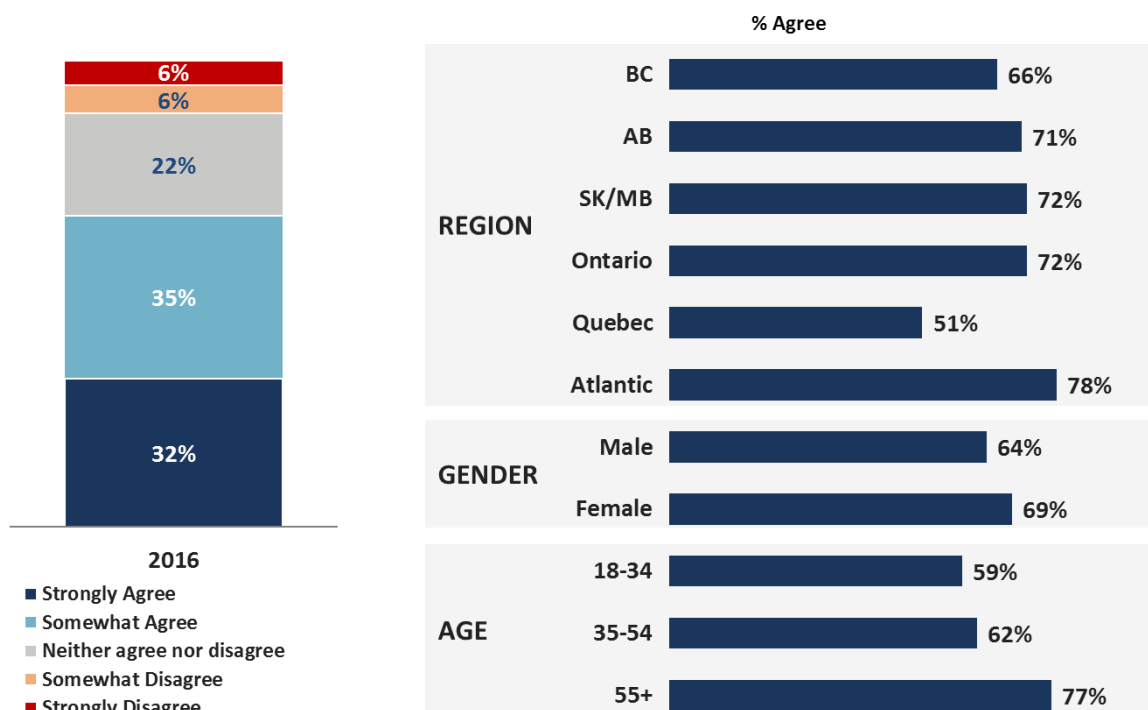
19. Do you agree with the statement "I would like the health care system to be more like Google and Amazon?" By that I mean I should be able to access my health records, book appointments, renew prescriptions even do simple check ins to review findings from routine tests, etc. via my mobile phone or tablet.

Base: All respondents (n=1286)

Two thirds (67%) of Canadians agree the Federal Government should require common indicators and reporting requirements to encourage accountability for healthcare funds given to each province and territory.

The Atlantic provinces are most likely to agree, while Quebec is significantly less likely to agree to identifying common indicators/reporting requirements. Agreement also increases with age, as three quarters of Canadians 55+ agree with identifying reporting requirements compared to only six in ten middle-age and younger Canadians.

2/3rds Of Canadians Agree The Federal Government Should Identify Common Indicators/Reporting Requirements To Encourage Better Accountability

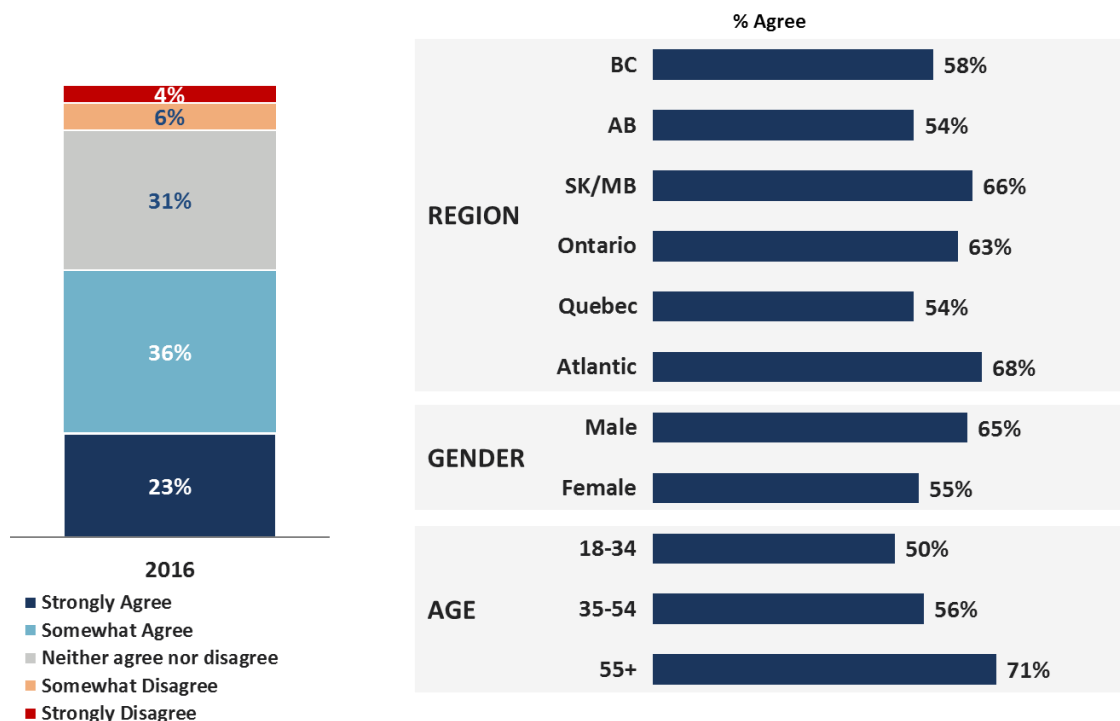


15. Do you agree that the federal government should identify common indicators and reporting requirements across provinces/territories to encourage better accountability for health care funds?
Base: All respondents (n=1286)

While two thirds of Canadians agree with identifying reporting requirements, slightly fewer agree that the Federal Government should make increased funding contingent on fulfilling reporting requirements. Six in ten (60%) agree with this measure, while three in ten (31%) are unsure and very few (10%) disagree.

Similarly, the Atlantic provinces are more likely to agree that increased funding be contingent upon reporting requirements, and this sentiment increases with age. Men are also more likely to agree compared to women (65% vs. 55%).

6 In 10 Canadians Agree Increased Funding For Health Care Should Be Contingent Upon Provinces And Territories Fulfill Reporting Requirements



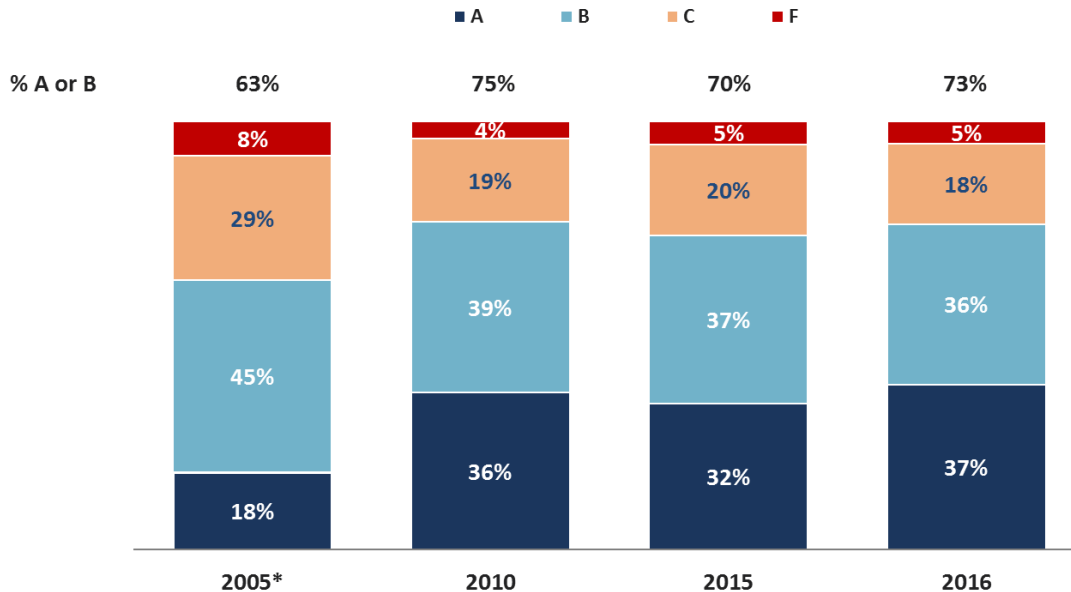
16. Do you agree that the federal government should make increased funding for health care contingent upon the provinces and territories fulfilling any reporting requirements that are agreed on as part of the health accord?

Base: All respondents (n=1286)

Annual Report Card

After a slight dip in 2015, Canadian's ratings of overall quality of healthcare have rebounded back to three quarters assigning an 'A' or 'B' letter grade – with 'A' letter grades up 5 points from last year.

Canadian's Perceptions On Overall Quality Of Healthcare Have Rebounded Back To 2010 Levels, With A 5% Increase In 'A' Letter Grades



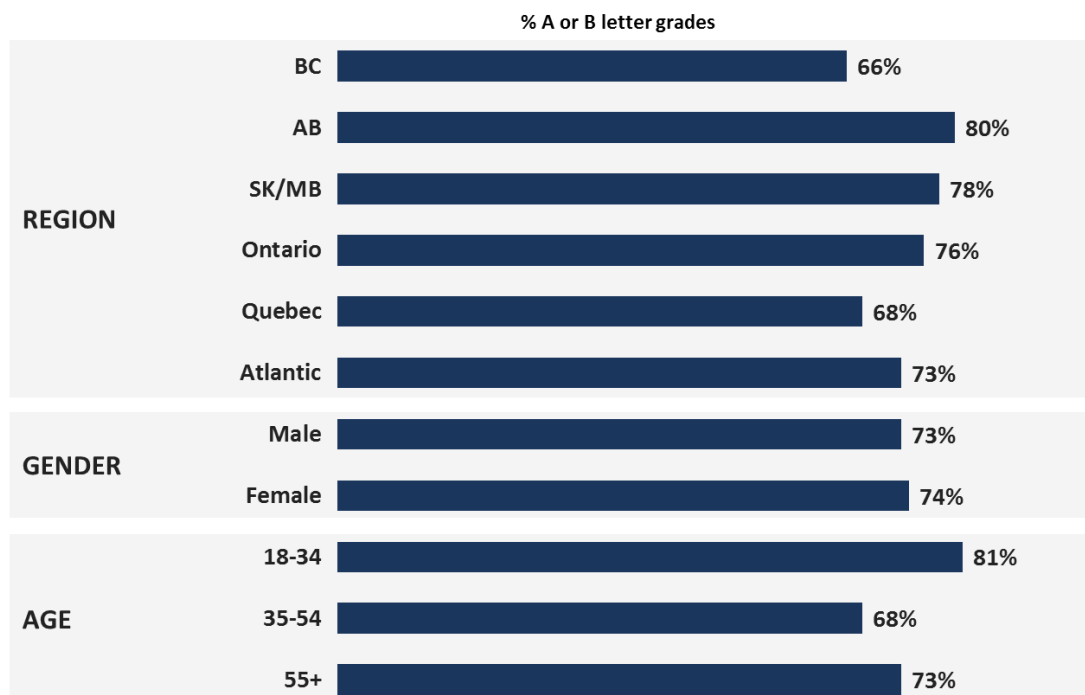
*Telephone survey

1_1. The following questions are about your overall views on the health system in Canada. Regardless of whether you have used the health system recently or not we would like to know your opinions. I would like you to grade each of the following aspects of the health system in your community with a letter grade, that is an A, a B, a C or an F, with A being the highest grade and F being a failing grade.

Base: All respondents (n=1286)

Ratings of overall quality are positive in all provinces, although slightly less so in British Columbia and Quebec. Younger Canadians 18-34 (81%) are more likely to assign an 'A' or 'B' grade compared to middle age 35-54 (68%) and older Canadians 55+ (73%).

Perceptions Of Overall Quality Of Health Care Higher In Prairie Provinces, Ontario, And Atlantic Provinces



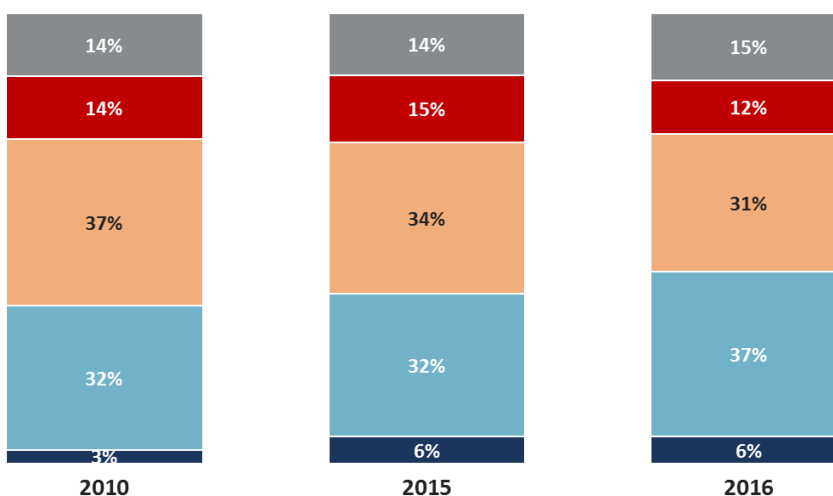
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Base: All respondents (n=1286)

Canadians are also more optimistic about the future of healthcare services in their communities compared to previous years. Four in ten (42%) think healthcare services will get better, and the same proportion (43%) think they will get worse – an improvement compared to 2015 where only 38% believed healthcare services would get better and 49% believed it would get worse.

Perceptions Of Improvements To Healthcare In The Community Over The Next Few Years Have Increased Compared To 2015 And 2010

■ Much better ■ Somewhat better ■ Somewhat worse ■ Much worse ■ Don't know



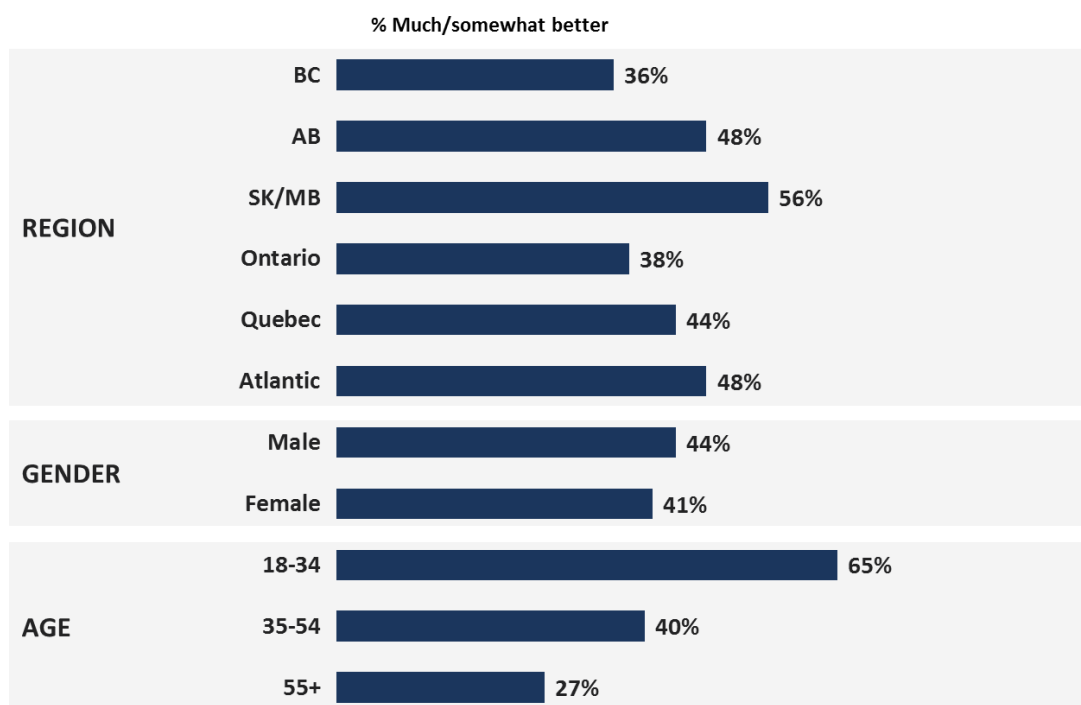
*Telephone survey

3. Overall, do you think health care services in your community will get much better, somewhat better, somewhat worse, or much worse over the next two or three years?

Base: All respondents (n=1286)

Residents of Saskatchewan/Manitoba are the most optimistic about the future of health care in their communities, and optimism is much higher among younger Canadians 18-34 compared to those middle-aged and older.

Saskatchewan/Manitoba Most Likely To Think Health Care In The Community Will Improve Over The Next Few Years



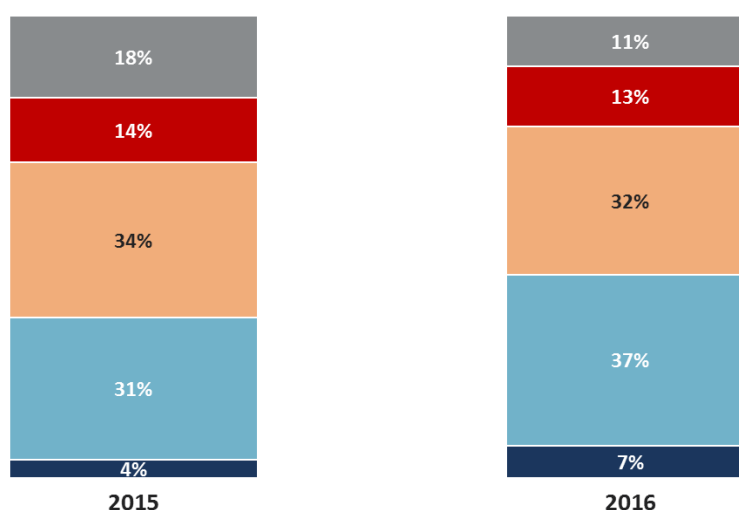
3. Overall, do you think health care services in your community will get much better, somewhat better, somewhat worse, or much worse over the next two or three years?

Base: All respondents (n=1286)

Canadian's more positive attitudes can also be seen in their comparisons of healthcare services to the recent past. Today 44% of Canadians think healthcare services in their community are better than they were five years ago, up 9 points from last year. A similar proportion think services are worse (unchanged since 2015), while the rest are unsure.

Canadians Have A More Optimistic View Of Health Care Services Over The Previous 5 Years Compared To 2015

■ Much better ■ Somewhat better ■ Somewhat worse ■ Much worse ■ Don't know

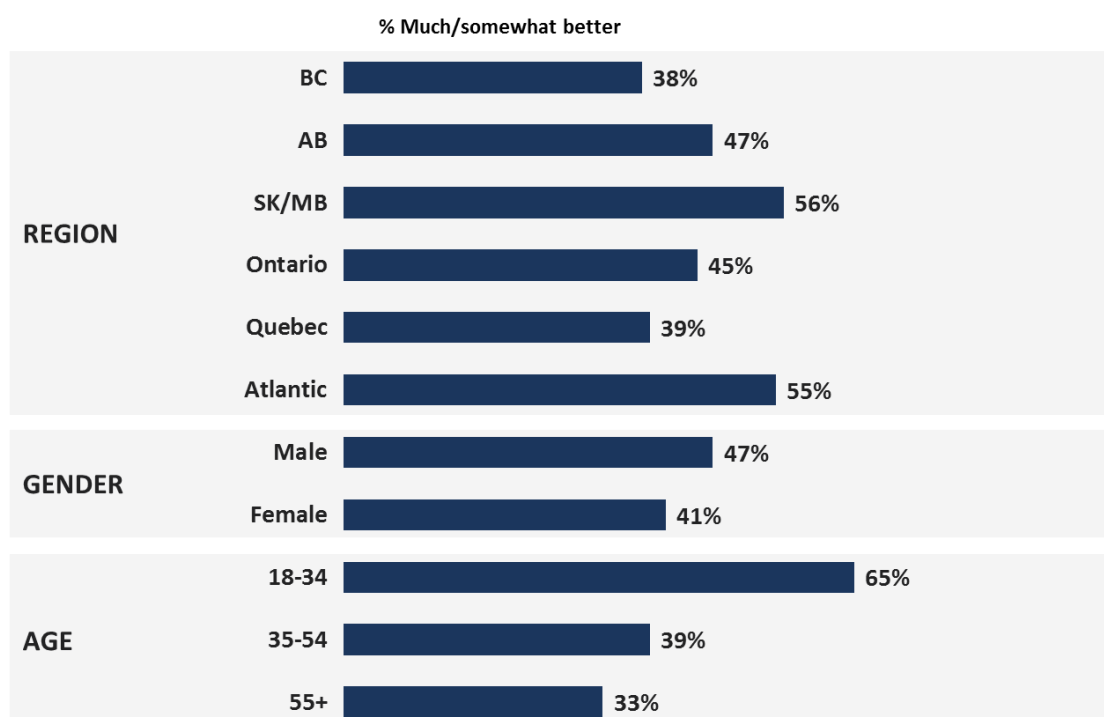


4. Looking back, do you think health care services in your community are much better, somewhat better, somewhat worse, or much worse compared to five years ago?

Base: All respondents (n=1286)

The same demographic patterns persist for feelings of improvement. Residents of Saskatchewan/Manitoba and the Atlantic provinces are more optimistic about healthcare services improving over the previous five years, as are younger Canadians 18-34 (65%) compared to middle age 35-54 (39%) and older Canadians 55+ (33%).

Saskatchewan/Manitoba And Atlantic Provinces More Likely To Think Health Care In The Community Has Improved In The Previous 5 Years

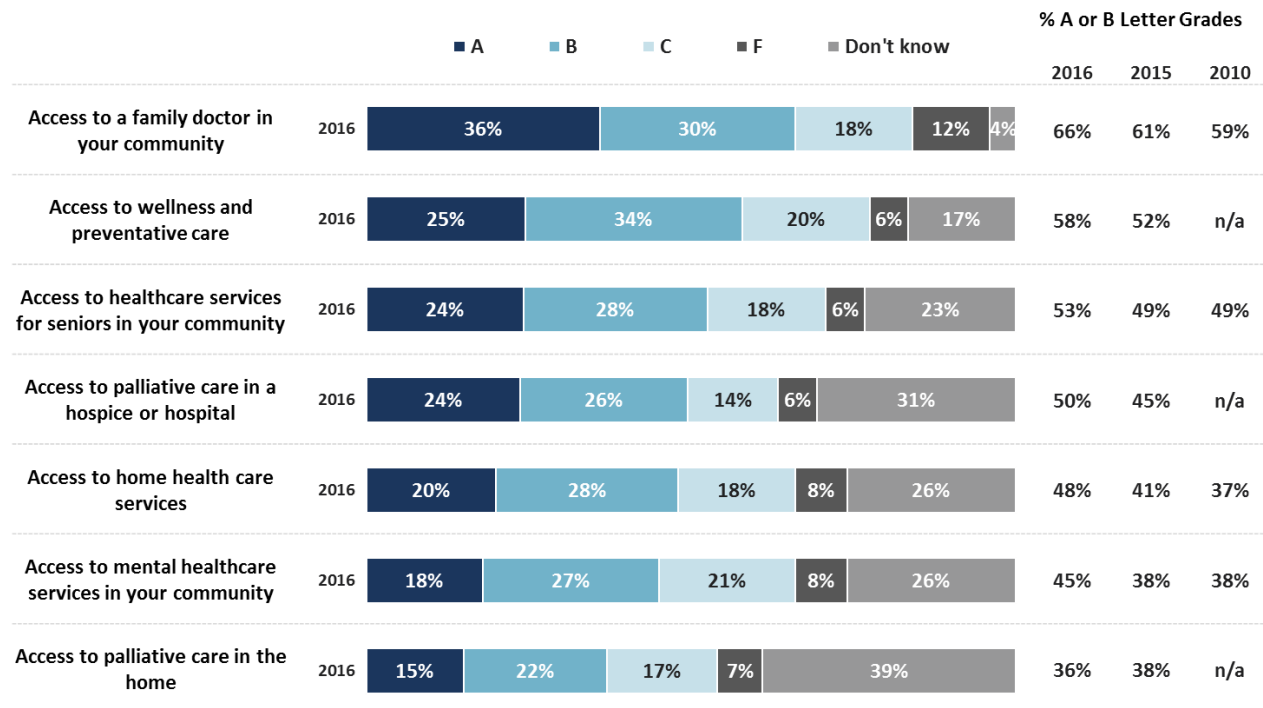


4. Looking back, do you think health care services in your community are much better, somewhat better, somewhat worse, or much worse compared to five years ago?

Base: All respondents (n=1286)

Canadian's perceptions of access to healthcare have improved in all services tested (with the exception of one) compared to 2015. Two thirds (66%) rate their access to a family doctor as an 'A' or 'B', and less than six in ten rate access to wellness and preventative care (58%) and healthcare services for seniors (53%) as an 'A' or 'B'. Around half of Canadians assign this rating to access to palliative care (50%), home health care services (48%), and mental healthcare services (45%). One third (36%) assign an 'A' or 'B' to access to palliative care in the home – the only healthcare service not increasing in letter grades since 2015.

Perceptions Of Access To Various Health Care Services Have Improved In 2016, Particularly Access To Home Care And Mental Health Services



2. The next question is about your ability to access healthcare services in your community. By access we mean you can get prompt health care services for you and your family when you need to. Again, please grade each of the following aspects of the health system with a letter grade, that is an A, a B, a C or an F, with A being the highest grade and F being a failing grade.

Base: All respondents (n=1286)

The upswing in perceptions of overall quality of health care services, perceived improvements in health care, and access are largely due to the increasingly optimistic views of younger Canadians (18-34). Since 2015, younger Canadians have become more optimistic about the health care system – possibly a reflection of the optimism toward the new Federal Government.

There has been an increase in Canadian youth (18-34) optimism on overall quality of the healthcare system and perceptions of improvements in the system over the past five years and into the next few years.

	18-34 YEAR OLDS		
	2010	2015	2016
Overall quality of health care services available to you and your family (% A or B letter grade)	79%	72%	81%
Health care services in community will get better over the next two or three years (% Better)	47%	47%	65%
Health care services in community are better compared to five years ago (% Better)	n/a	43%	65%