

# A CRISIS OF CONFIDENCE

## ATTITUDES TOWARD HEALTHCARE IN CANADA

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August 2022

GAME CHANGERS



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# WHAT WE DID AND KEY OBSERVATIONS



# The Situation

## THE ISSUE

Canadians have regularly felt that their healthcare system was facing some sort of crisis in the past. We have experienced debates about access, wait times, funding, and responsibility over several decades.

But the current situation seems a bit different. The system largely responded during the heat of the pandemic, but that experience laid bare a variety of deficiencies. It is now not only about access and delivery, but also staffing, resourcing and even increasing privatization.

## WHAT WE DID

In order to gauge what Canadians think, in August 2022 we repeated a survey that we original conducted in 2018 and then again in 2020. The study was conducted across 29 countries to provide some country comparisons (see Methodology).

# Key Observations

## THE CURRENT

Canadians are clearly having a crisis of confidence with respect to their healthcare system. Barely half (54%) give positive ratings to “the quality of healthcare that you and your family have access to in your country.” Disturbingly, this is down a full 18 percentage points since 2020. And trust in the system stands at 53% down a full 11 percentage points since 2020.

While Canadians like to brag about their healthcare system, especially compared to the US, the international ratings suggest that this is not warranted. Canada ranks 16<sup>th</sup> of the 29 countries in positive ratings of their healthcare system (down from ranking 5<sup>th</sup> in 2020). Indeed, Canadians trail Americans in their ratings of their system by a full 12 percentage points (66% positive vs. 54% in Canada).

The deterioration in assessments of the system in Canada has happened across all demographics and regions. But Atlantic Canada emerges as the most problematic, Quebec a bit less so. This is also true for women, lower education and lower income.

## THE FUTURE

Looking to the future, Canadians increasingly expect the healthcare system to deteriorate even further. Twice as many think the system will get worse (32%) than improve (16%) (for a net of -16). This is a deterioration from 2020 (net of -5).

Moving forward, human resources (staffing) is the biggest and growing challenge facing the system according to Canadians, followed by wait times, an aging population and bureaucracy. Interestingly, lack of investment or cost to access are not high on the list.

The bottom-line is that Canada is likely at a watershed moment regarding its healthcare system. Many among the public have lost faith in the system. All kinds of groups are entering the debate and the normal *provinces versus the federal government* rifts remain. In responding to their concerns, Canadians will need to be prepared for and open to some significant changes to the system. It is not about simply throwing more money into the pot.

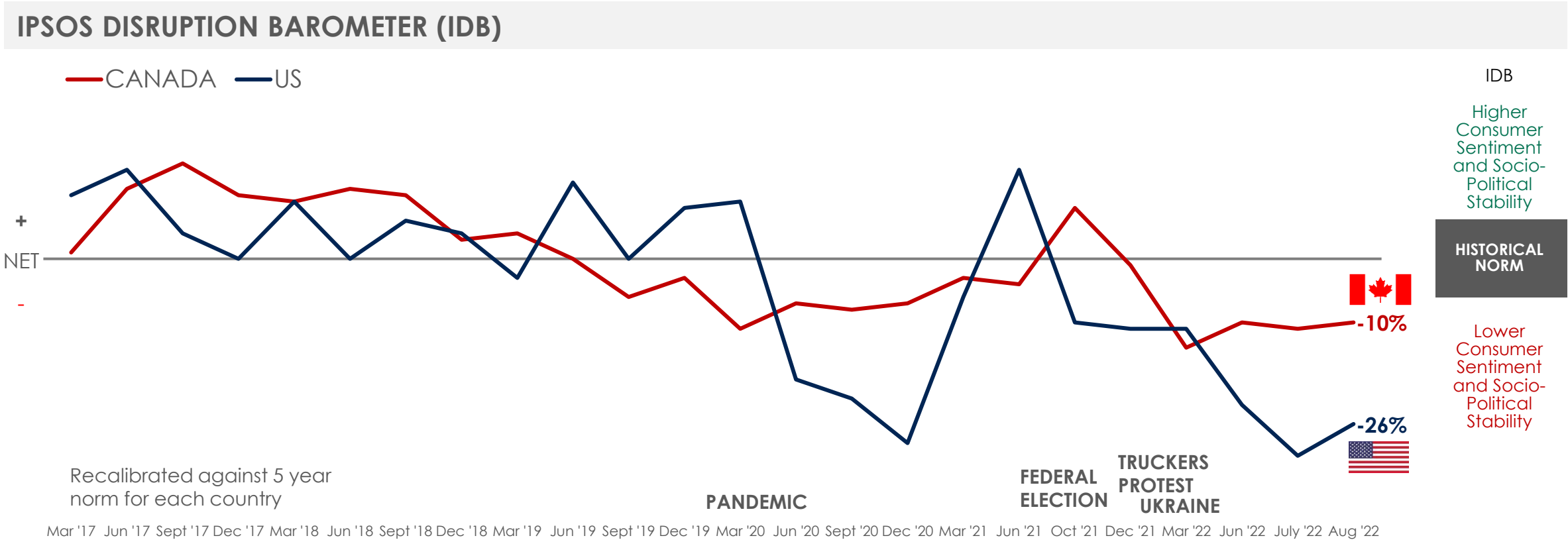


# HEALTHCARE IN CONTEXT

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# GENERAL SENTIMENT

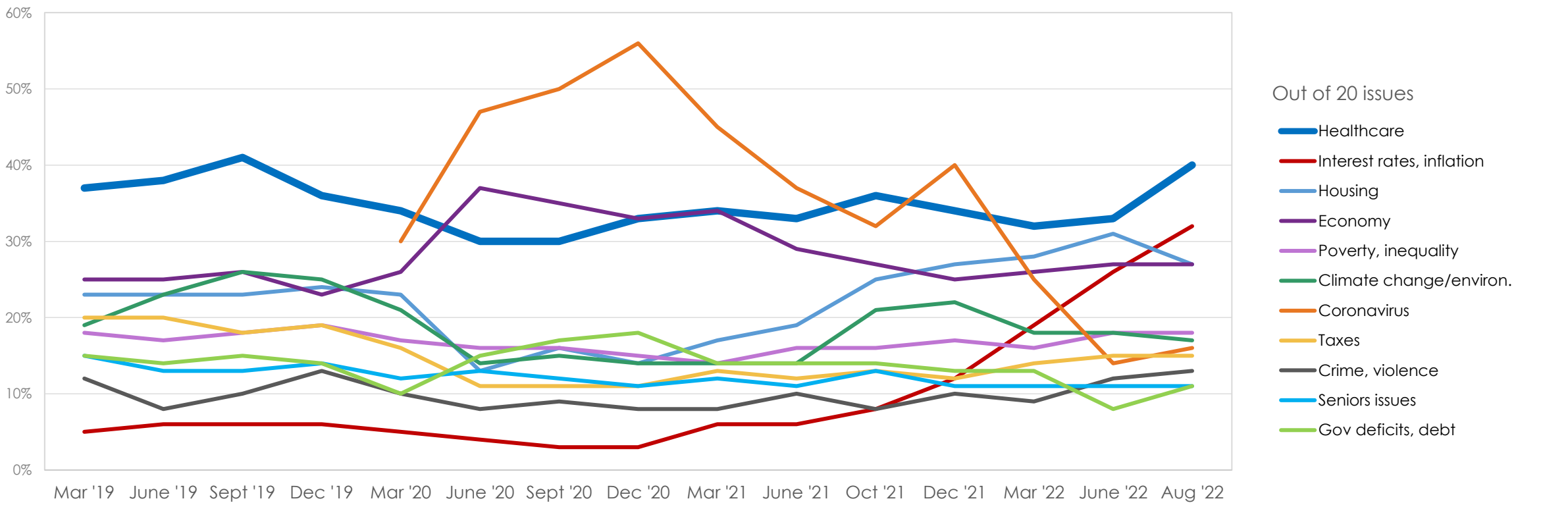
Canadians remain in a negative mindset with respect to their general sentiment. This not only impacts consumer spending, but also creates an environment with potential for socio-political disruption and more of a “me over we” than “we over me” perspective. This is relevant when addressing Canadians concerns, including healthcare.



# TOP ISSUES

Within this environment, healthcare has always been among the top issues for Canadians, but it has clearly separated itself out as the top issue in the country for August. Inflation/interest rates rank second.

**MOST IMPORTANT ISSUES FACING CANADA** (MENTIONED IN TOP 3)





# TOP HEALTH CONDITIONS

Additionally, COVID remains a top health condition issue in the country but has dropped significantly since 2020. Mental health ranks a close second and cancer third.

In Canada ... Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

		VS. 2020	VS. GLOBAL AVG
Coronavirus	49%	-24	+2
Mental health	46%	+4	+10
Cancer	30%	-5	-4
Drug abuse	17%	+1	+1
Obesity	17%	+5	-5
Stress	14%	+1	-12
Heart Disease	12%	+3	-1
Diabetes	8%	+1	-8
Alcohol abuse	7%	0	-6
Dementia	5%	+2	0
Smoking	3%	0	-8
Hospital superbugs	2%	+1	-1
STIs	1%	0	-2

# ASSESSMENTS OF THE SYSTEM

# 3

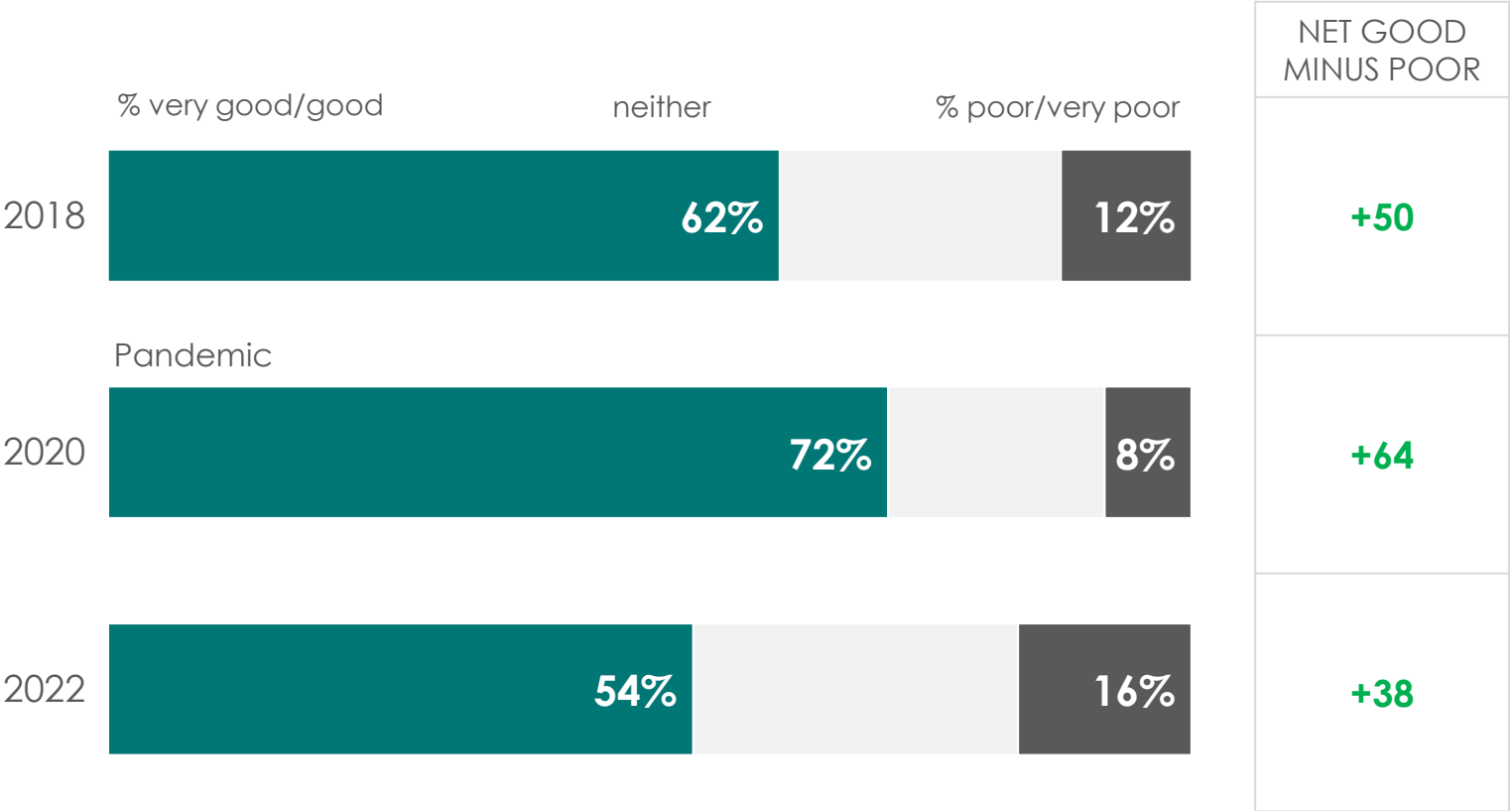


# QUALITY OF HEALTHCARE

Canadians rallied around their healthcare system when the pandemic was in full fury – perceived quality of care increased by 10 percentage points from 2018 to 2020.

But post-pandemic, Canadians have become much more critical of the system. Positive ratings of the system have dropped a full 18 percentage points from 2020 to 2022.

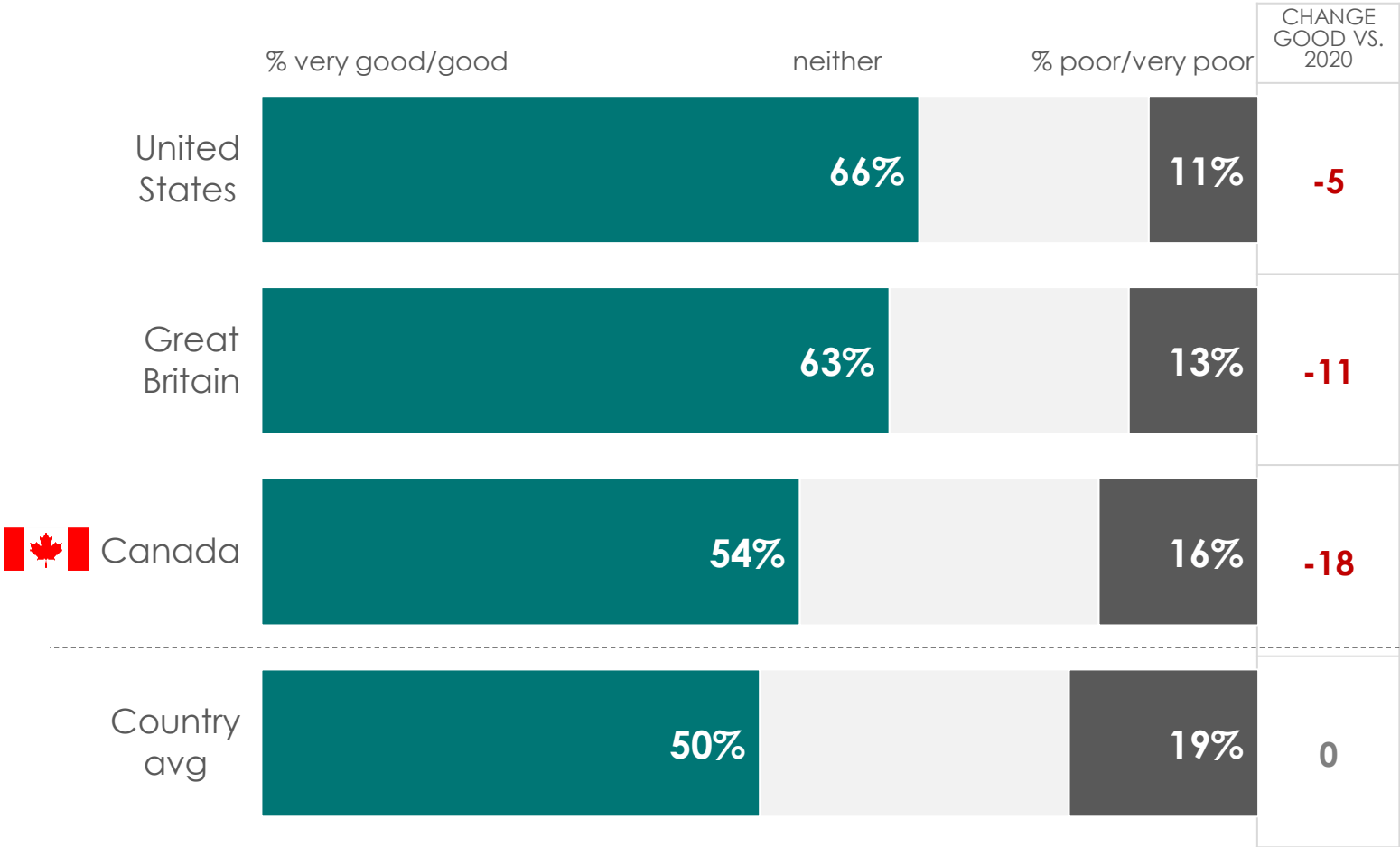
**How would you rate the quality of healthcare that you and your family have access to in your country?** By healthcare we include doctors, specialist physicians such as surgeons, hospitals, tests for diagnosis and drugs to treat various ailments.



# QUALITY OF HEALTHCARE

While Canadians like to brag about their healthcare system, many other countries, including the US, receive higher overall quality ratings than Canadians give theirs.

Canada ranks 16<sup>th</sup> of 29 countries in positive ratings of their healthcare system.

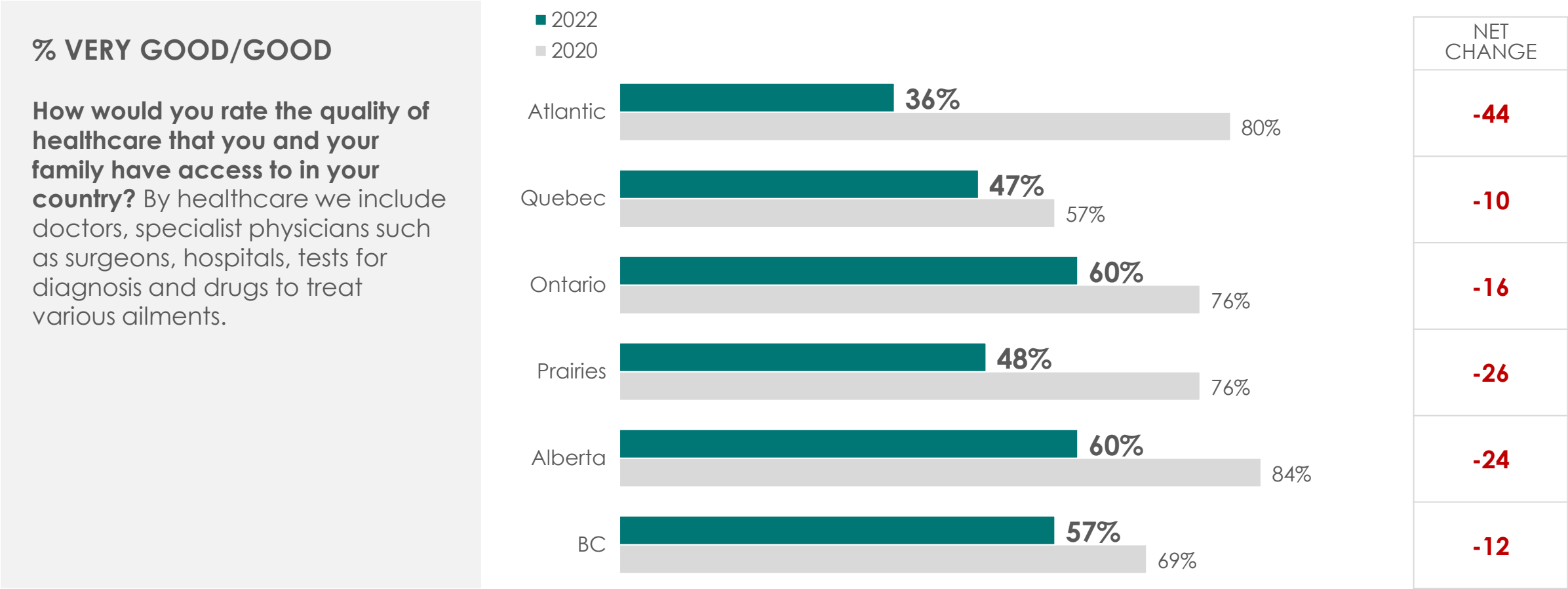


How would you rate the quality of healthcare that you and your family have access to in your country? By healthcare we include doctors, specialist physicians such as surgeons, hospitals, tests for diagnosis and drugs to treat various ailments.



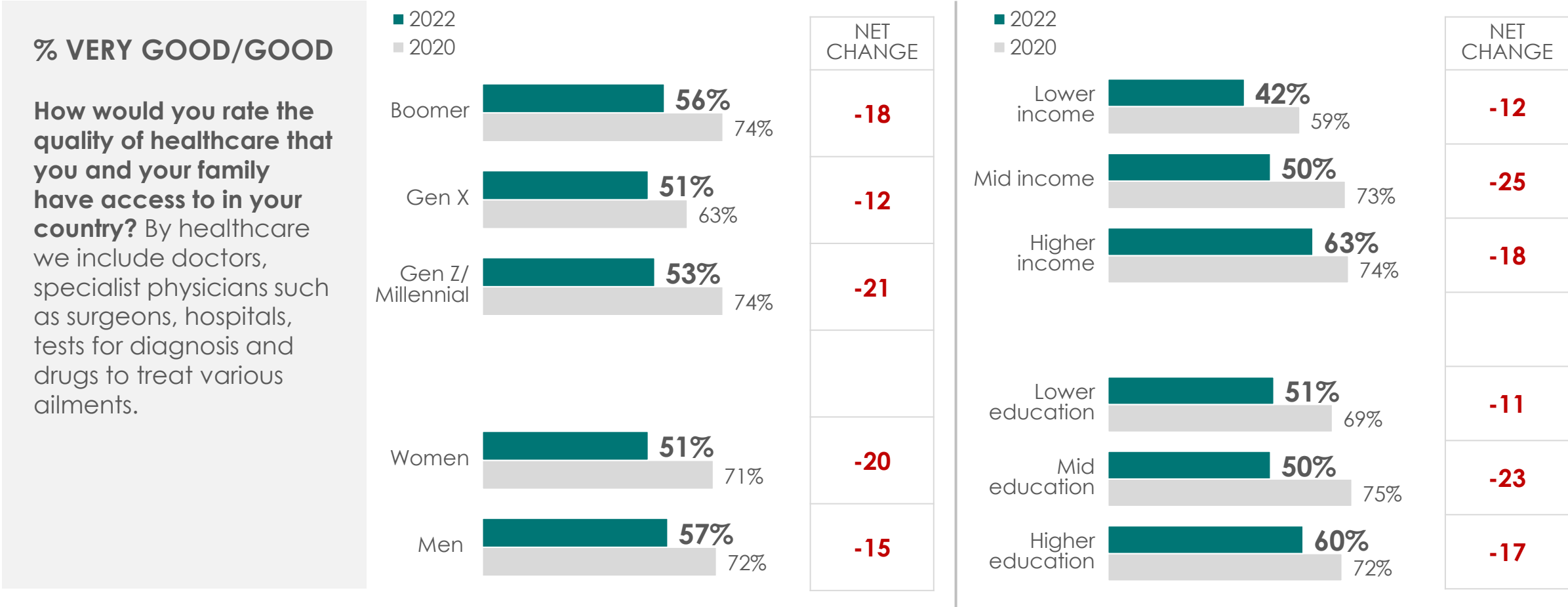
# QUALITY OF HEALTHCARE BY REGION

Ontarians, Albertans and British Columbians are much more positive toward their healthcare system than other regions, especially the Atlantic. But all regions have dropped significantly since 2020, most precipitously in the Prairies, Alberta and especially Atlantic.



# QUALITY OF HEALTHCARE BY DEMOGRAPHICS

Higher income, higher education and men tend to be more positive in assessing the healthcare system. There is no real difference by generation. All demographics have declined significantly since 2020, with the biggest declines among younger Canadians, women, middle education and middle income.





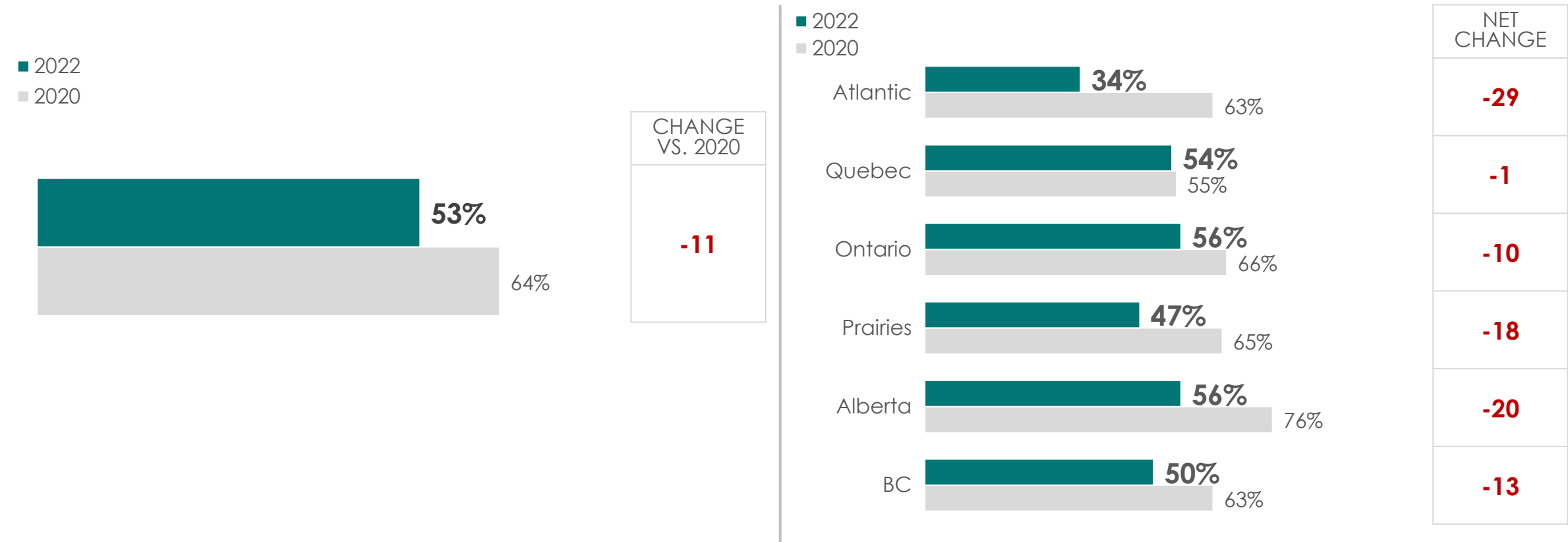
# ATTITUDES TOWARD THE SYSTEM

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# ATTITUDES TOWARD THE SYSTEM – TRUST

Trust is fundamental to citizen confidence in the healthcare system. This is under assault in Canada. Only half of Canadians trust the system to provide them with the best treatment, down a full 11 percentage points from 2020. Trust is generally similar across regions except in Atlantic where it is especially low. It has declined in all regions except Quebec, but a little less in Ontario and again especially in Atlantic.

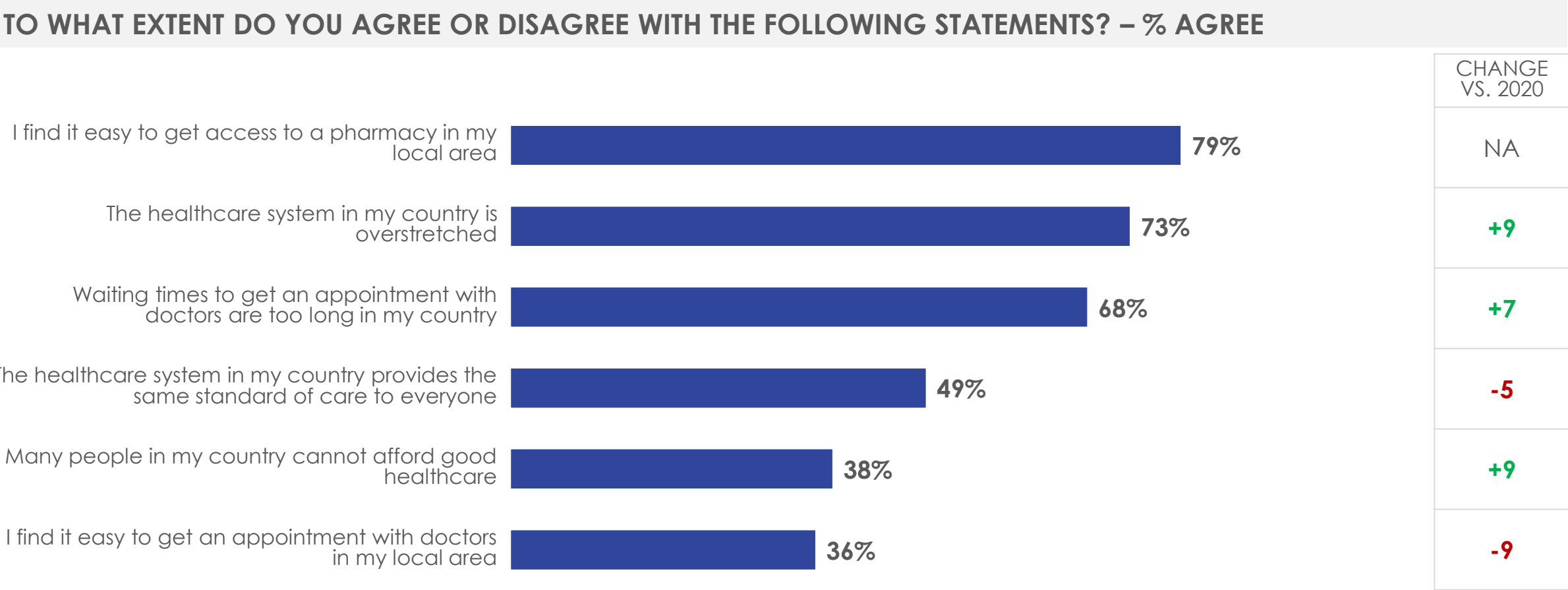
I TRUST THE HEALTHCARE SYSTEM IN MY COUNTRY TO PROVIDE ME WITH THE BEST TREATMENTS – % AGREE





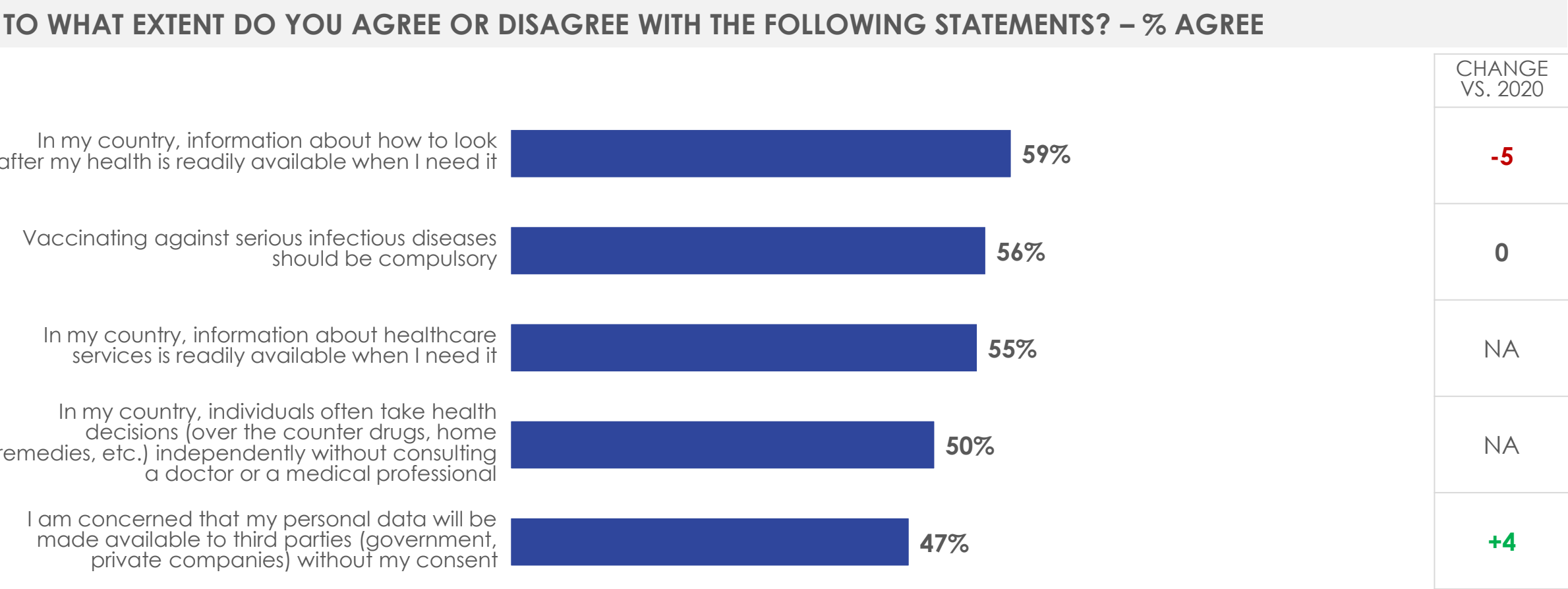
# ATTITUDES TOWARD THE SYSTEM – ACCESS

While Canadians say they have no real problems accessing pharmacy services, they increasingly believe the system is overstretched and that appointment wait times are too long, and decreasingly believe that standard of care is universal and it is easy to get a doctor’s appointment.



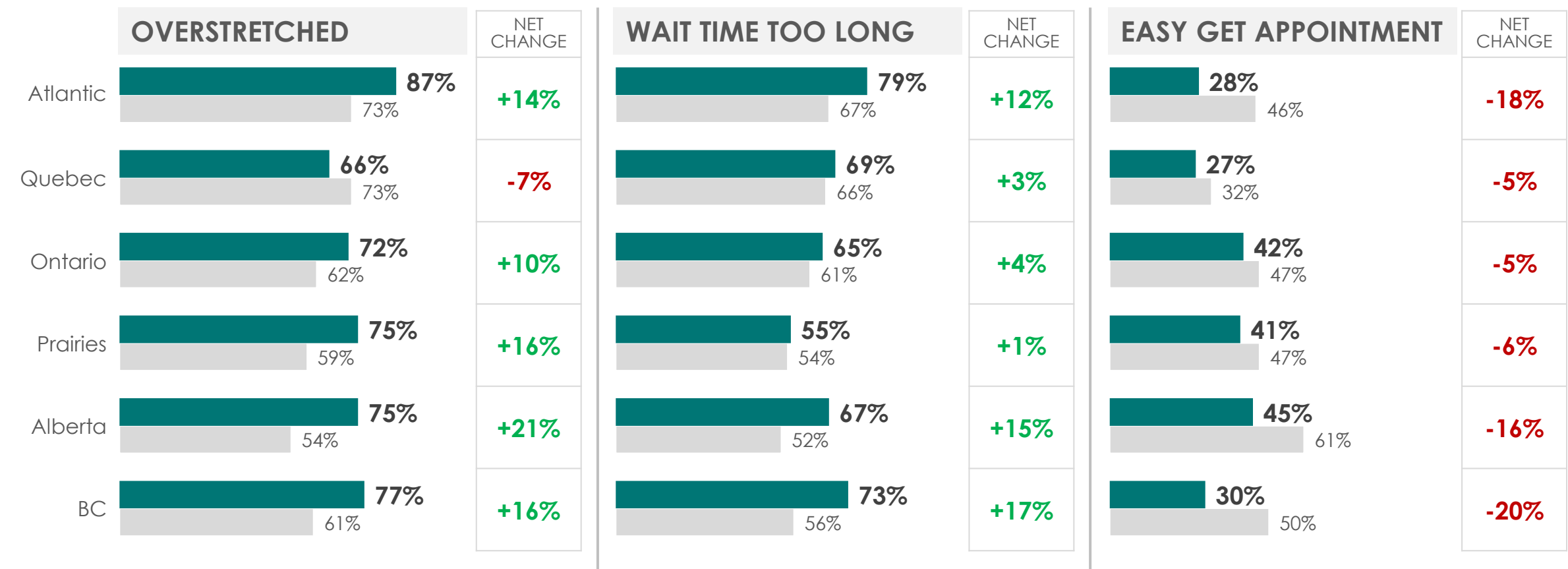
# ATTITUDES – OTHER

Canadians are generally not overly positive about the amount of healthcare information available to them. They remain divided on mandatory vaccinations and half continue to be concerned about the confidentiality of their personal information.



# SELECT ATTITUDES BY REGION

A majority in all regions believe the system is overstretched, highest in Atlantic and a bit lower in Quebec. Wait times are considered to be too long in all regions, again highest in Atlantic and a bit lower in the Prairies. Finally ease of getting a doctor's appointment is relatively low in all regions, although is relatively higher in Ontario, Alberta and the Prairies.



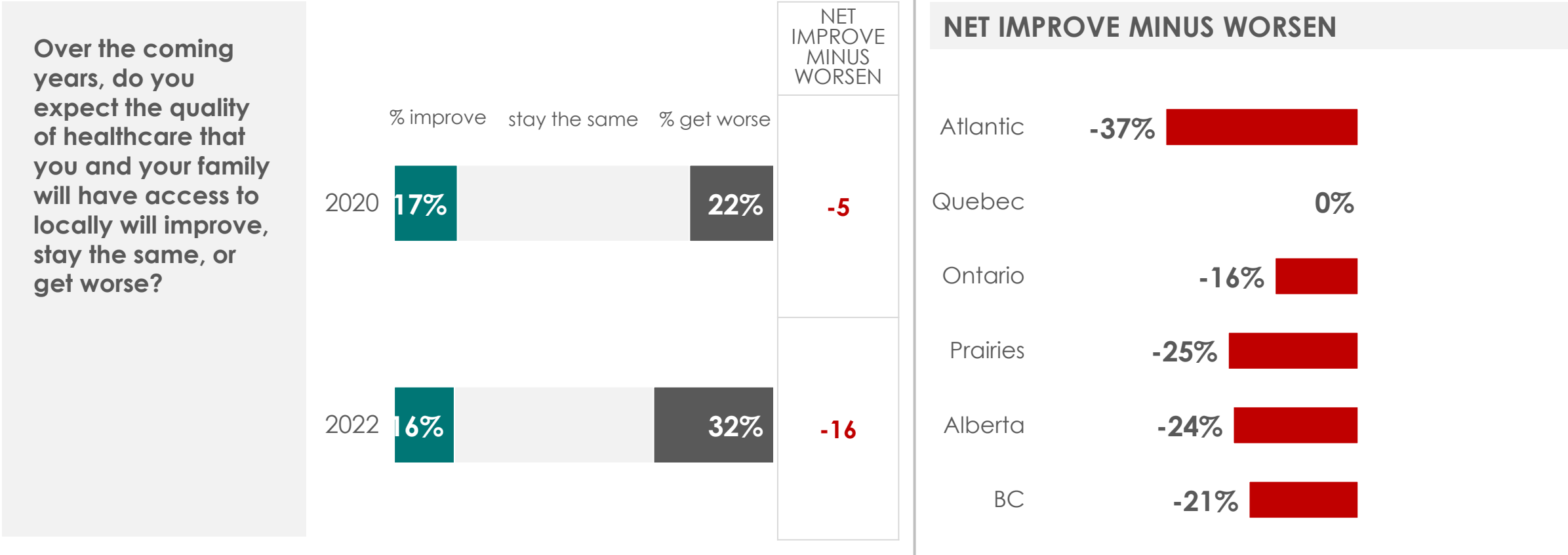


# FUTURE EXPECTATIONS

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# FUTURE QUALITY OF HEALTHCARE

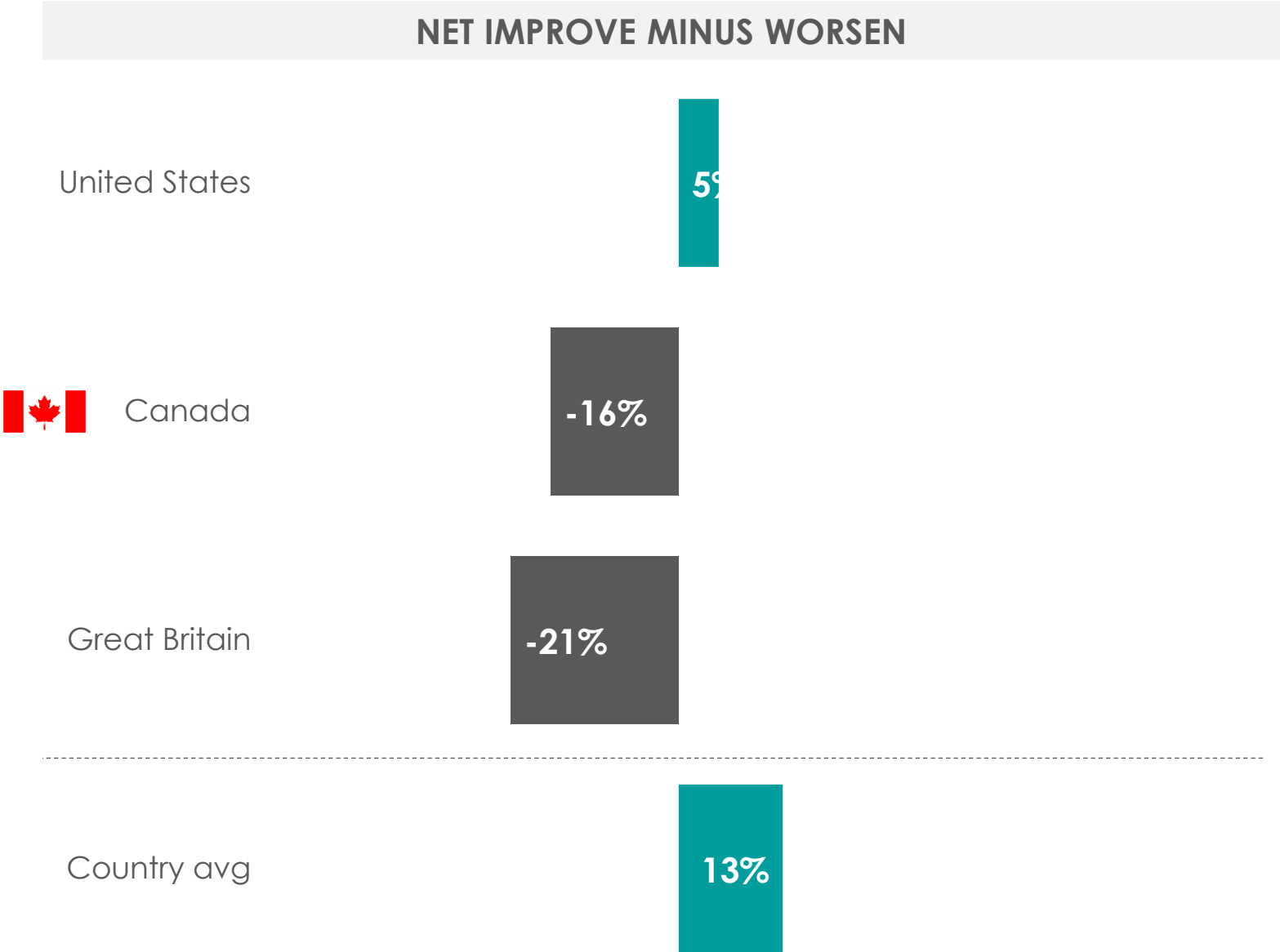
Canadians were mildly more pessimistic than optimistic in 2020 in their expectations for the healthcare system (-5 points). They have become more decidedly pessimistic in 2022 (-16 points). All regions except Quebec expect significant deterioration in the healthcare system in the future. Atlantic Canadians are the most pessimistic, and aside from Quebec, Ontario relatively less so.



# FUTURE QUALITY OF HEALTHCARE

Canadians are among the most pessimistic countries in what they expect for changes to the quality of their healthcare system. They are the 8<sup>th</sup> lowest of 29 countries.

Over the coming years, do you expect the quality of healthcare that you and your family will have access to locally will improve, stay the same, or get worse?





# CHALLENGES FUTURE QUALITY OF CARE

Moving forward, human resources (staffing) is the biggest and growing challenge facing the system according to Canadians, followed by wait times, an aging population and bureaucracy. Interestingly, lack of investment or cost to access are not high on the list.

Overall, which of the following, if any, do you see as the biggest problems facing the healthcare system in your country?

		NET CHANGE VS. 2020	VS. GLOBAL AVG
Not enough staff	<div></div> 63%	+9	+21
Access treatment/wait times	<div></div> 47%	+5	+5
Aging population	<div></div> 29%	-7	+10
Bureaucracy	<div></div> 20%	-5	-5
Lack invest preventative	<div></div> 18%	+2	-4
Lack investment	<div></div> 16%	+4	-4
Cost to access	<div></div> 12%	+1	-19
Poor quality treatment	<div></div> 7%	+1	-10
Lack choice	<div></div> 7%	+2	-2
Poor safety	<div></div> 4%	+2	-5
Low cleanliness standards	<div></div> 3%	-2	-4

# METHODOLOGY

This 29-country Global Advisor survey was conducted between July 27 and August 7, 2022 via the Ipsos Online Panel system among 21,000 adults aged 18-74 in Canada, Malaysia, South Africa, Turkey and the United States, and 16-74 in all other countries.

The sample consists of approximately 1000+ individuals in each of Australia, Belgium, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Mexico, Spain, Sweden, and the US, and approximately 500+ individuals in each of Argentina, Chile, Hungary, India, Malaysia, the Netherlands, Switzerland, Peru, Poland, Saudi Arabia, South Africa, South Korea, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland and the U.S. can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, China, India, Malaysia, Mexico, Peru, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of these populations.

Weighting has been employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent census data.

The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of don't knows or not stated responses.

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