



Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists



Canadian Foundation for
**Healthcare
Improvement**



Canadian Foundation for Healthcare Improvement (CFHI) 7th Annual CEO Forum 2013

PATIENT AND FAMILY-CENTRED CARE AND EFFICIENCY: COMPLEMENTARY AIMS?

Checking in With Canadians and Checking Up On How They View their Healthcare System

Presented by:

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Purpose

- To check in with Canadian citizen-patients and understand their perceptions and experiences in a current and time comparison basis
- To be able to compare various regions/provinces with a net scoring system for analysis and future tracking
- Ipsos examined 24 specific elements in four categories:
 - ⇒ Ease of Access and Patient Experience
 - ⇒ Care and Compassion
 - ⇒ Coordination and Communication
 - ⇒ Efficiency of Time and Money
- Ipsos then employed a scorecard based on the net findings (removing “no change” and subtracting the positive from the negative findings) and on the gap scores in the statements sections.
- There is a huge amount of data and a report we will provide access too...for the brief time this morning that I have I will give you impressions and more of a scorecard/top line set of findings...

Methodology

- These are some of the findings of an Ipsos Reid survey conducted between January 4th and 18th, 2013, for this specific Canadian Foundation for Healthcare Improvement CEO forum.
- For this survey, a sample of 1,000 Canadians aged 18 to 64 from Ipsos' Canadian online panel was interviewed online.
- Weighting was then employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe. The precision of Ipsos online surveys is measured using a credibility interval. In this case, the survey is accurate to within +/- 3.5 percentage points had all Canadians adults been polled.

By The Numbers: Access To Family Doctor / General Practitioner for Referral...

6 in 10
(62%)

Have Own Doctor

Yes, I (we) see the same doctor regularly



62%

Yes, but they are part of a healthcare team and if we can't see them, personally, we can always see someone else who has access to our records and can treat us



16%

No, we go to a public clinic and meet any doctor who is available at the moment



15%

No, we really don't have access to the healthcare system unless it is for an emergency



4%

No, we go to the hospital emergency ward or patient intake to see a doctor

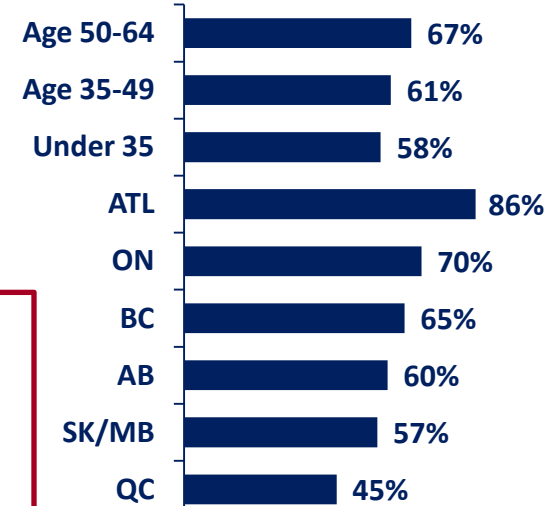


2%

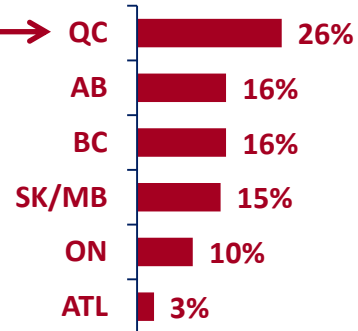
No, but we have access to a healthcare deliverer or worker who is not a doctor who can help us from time to time



1%



No Family Doctor
NET: 23%



- Ipsos examined 24 specific elements in four categories:
 - ⇒ Ease of Access and Patient Experience
 - ⇒ Care and Compassion
 - ⇒ Coordination and Communication
 - ⇒ Efficiency of Time and Money

ACCESS TO ASPECTS OF THE HEALTHCARE SYSTEM

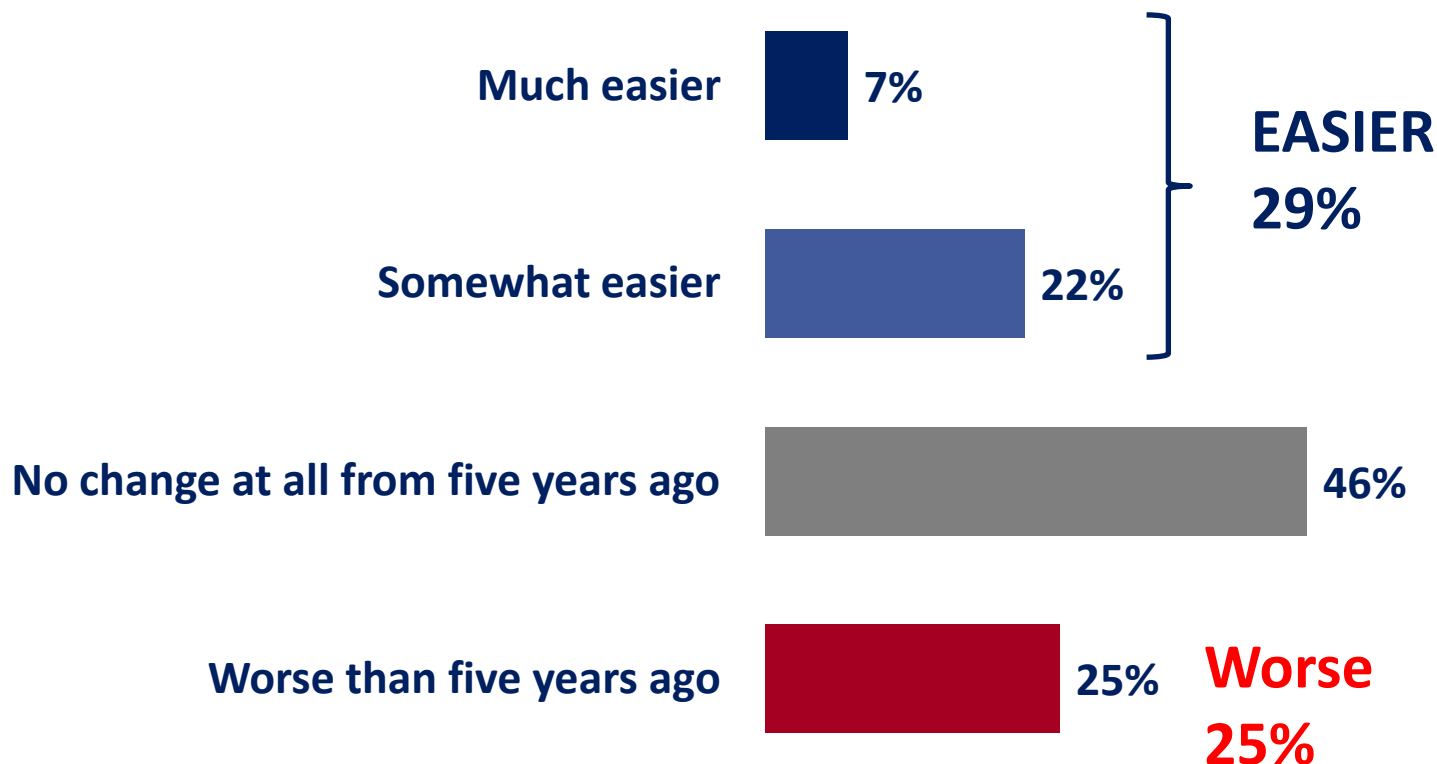
Compared To Five Years Ago

Respondents were asked to think about the access that they and members of their household personally have to healthcare services overall—including doctors, specialist physicians such as surgeons, hospitals, tests for diagnosis and drugs to treat various ailments—as a patient in their local community and indicate how much easier is their ability to access those services today compared to five years ago (in 2008)



Nationally, Easier Access to Healthcare System Compared to Five Years Ago for Many (29%) is Traded Off Against Those Who Find it Worse (25%) for Only +4 Momentum... Almost Half (46%) See No Change...

NET IMPROVEMENT SCORE + 4



Q1. Thinking about the access that you and members of your household personally have to healthcare services overall--including doctors, specialist physicians such as surgeons, hospitals, tests for diagnosis and drugs to treat various ailments--as a patient in your local community, how much easier is your ability to access those services today compared to five years ago (in 2008): Base: Canadians aged 18-65 (n=1000)

National Majorities Cite No Change, But Improvements to Access Evident...

Much Easier
 Somewhat Easier
 No Change at all from 5 years ago
 Worse than 5 years ago

Drugs to treat various ailments

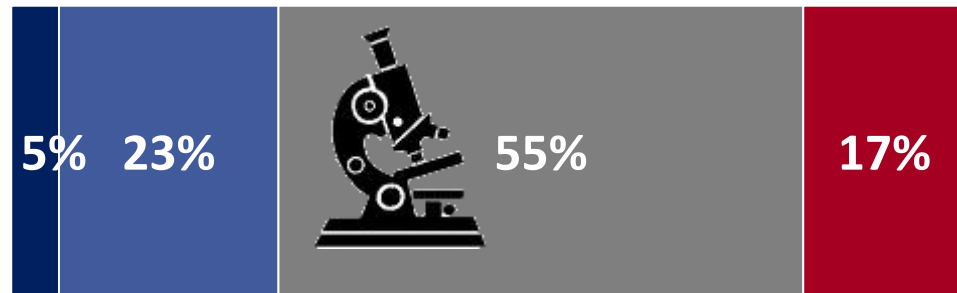


%
Easier

NET
Score

30% + 19

Tests for diagnosis such as x-rays or blood and urine tests

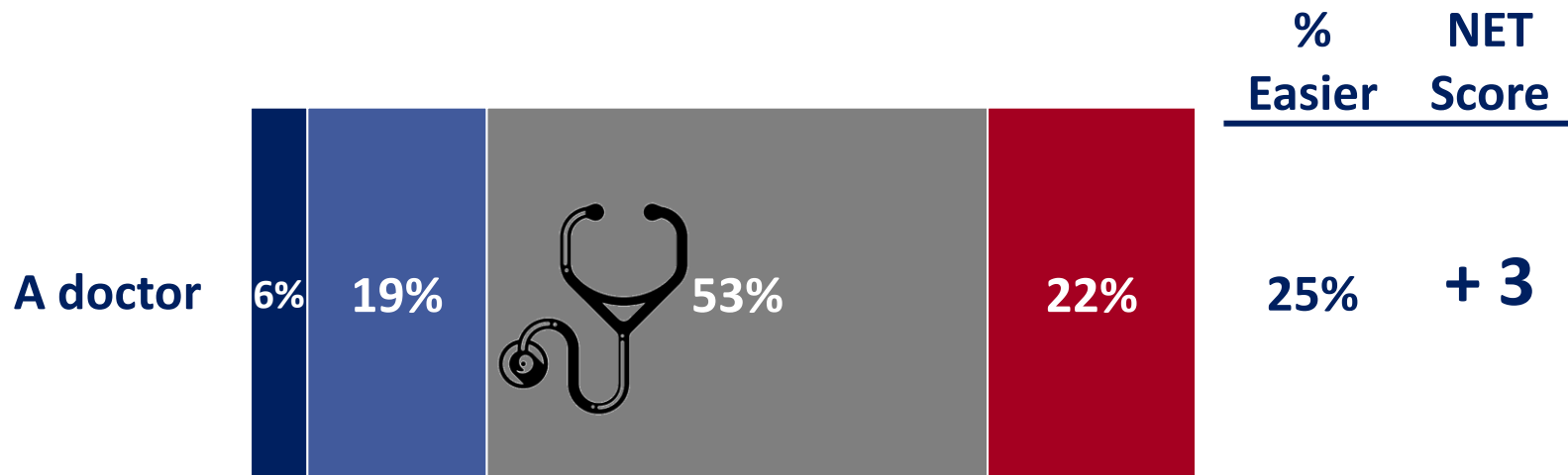


28% + 12

Q2. Now thinking about the access that you and members of your household personally have to each healthcare service in your local community, how much easier is your ability to access those services today compared to five years ago (in 2008) Base: Canadians aged 18-65 (n=1000)

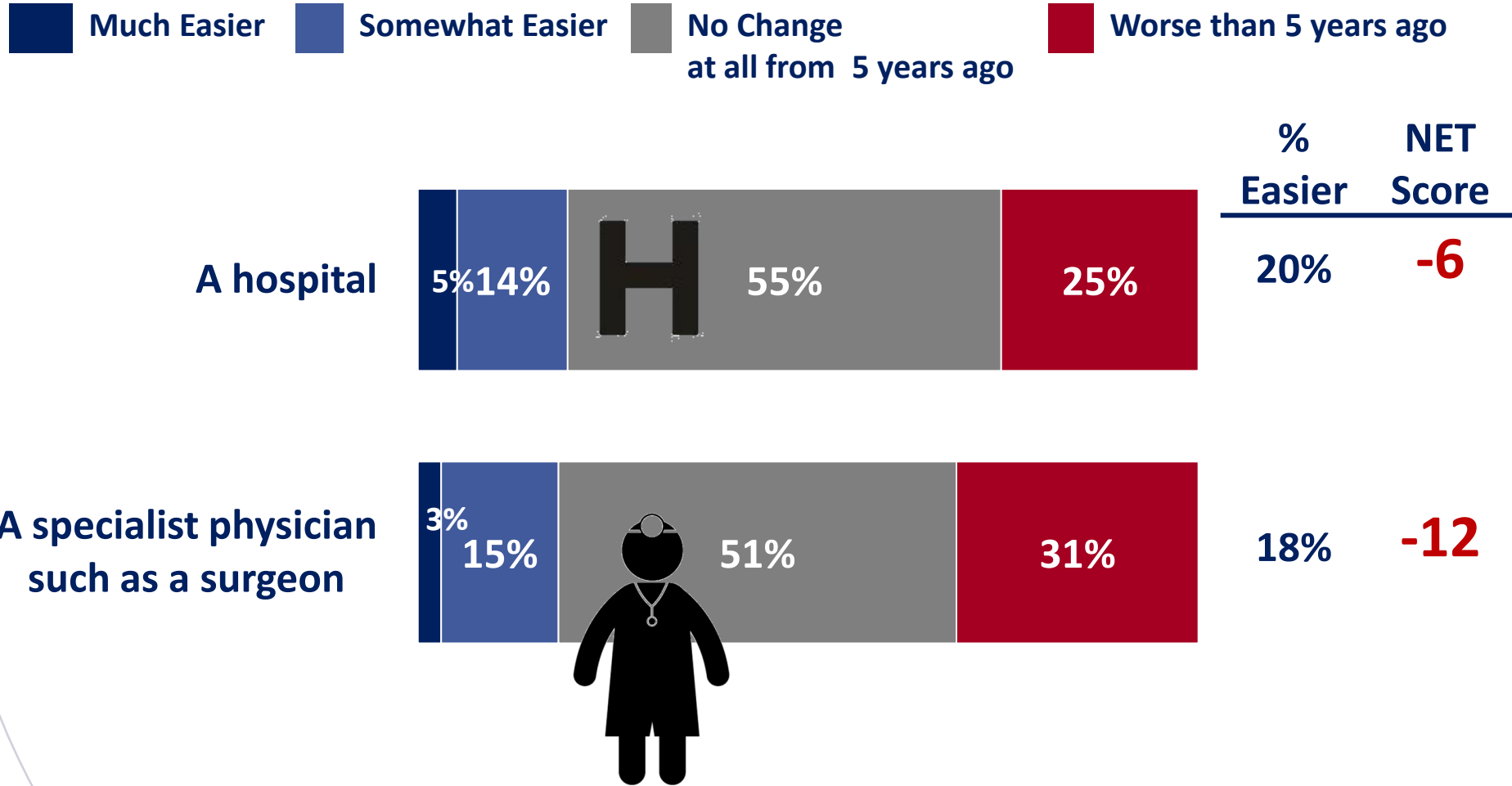
Nationally, Majority (53%) Say No Change to Access...

Much Easier
 Somewhat Easier
 No Change at all from 5 years ago
 Worse than 5 years ago



Q2. Now thinking about the access that you and members of your household personally have to each healthcare service in your local community, how much easier is your ability to access those services today compared to five years ago (in 2008) Base: Canadians aged 18-65 (n=1000)

National Majorities Also Say No Change But Worsening Access Evident...



Q2. Now thinking about the access that you and members of your household personally have to each healthcare service in your local community, how much easier is your ability to access those services today compared to five years ago (in 2008) Base: Canadians aged 18-65 (n=1000)

Ease of Access – Compared to 5 Years Ago

REGIONAL NET SCORES

	OVERALL	BC	AB	SK/MB	ON	QC	ATL
Access Perception	4	-1	4	15 ✓	11	-9 ✗	8
Drugs	19	10 ✗	12	29 ✓	20	24	13
Test for Diagnosis	12	2	3	10	18 ✓	13	-3 ✗
A Doctor	3	-3	8	11 ✓	10	-7 ✗	-3
A Hospital	-6	1 ✓	-13	-6	1 ✓	-15 ✗	-7
Specialist (e.g. Surgeon)	-12	-18	-18	-9	-5 ✓	-17	-21 ✗
NET TOTAL	20	-9	-4	50	55 ✓	-11	-13 ✗



Positive



Negative



Highest of Regions that Category



Lowest of Regions that Category

Ease of Access – Compared to 5 Years Ago



Regional Net Scores:

MOST Improved

LEAST Improved

OVERALL (NET)

ON

+55

ALT

-13

Perceived Total Access

SK/MB

+15

QC

-9

Drugs

SK/MB

+29

BC

+10

Test For Diagnosis

ON

+18

ALT

-3

A Doctor

SK/MB

+11

QC

-7

A Hospital

BC/ON

+1

QC

-15

Specialists (e.g. Surgeon)

ON

-5

ALT

-21

RATING THE PATIENT EXPERIENCE

Compared To Five Years Ago

Now thinking about your patient experience recently compared to five years ago (in 2008) in going to a doctor and then being diagnosed, referred to a specialist or for surgery, or treated for an accident or serious ailment or condition, have you found it to be...

Nationally—Much Improved Patient Experience For These...

Agree Very Much
 Agree Somewhat
 No Change at all from 5 years ago
 Worse than 5 years ago

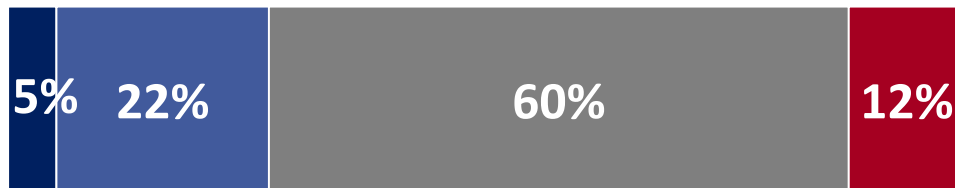
%
Agree NET

Better information shared with me



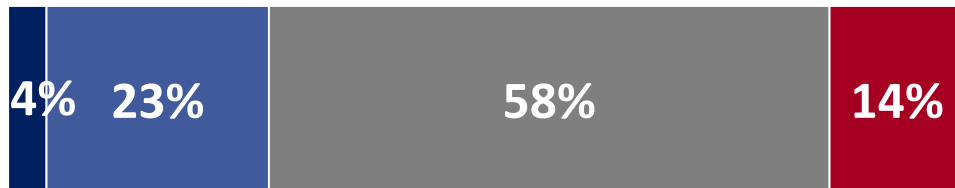
30% + 19

More options given to me for treatment



28% + 16

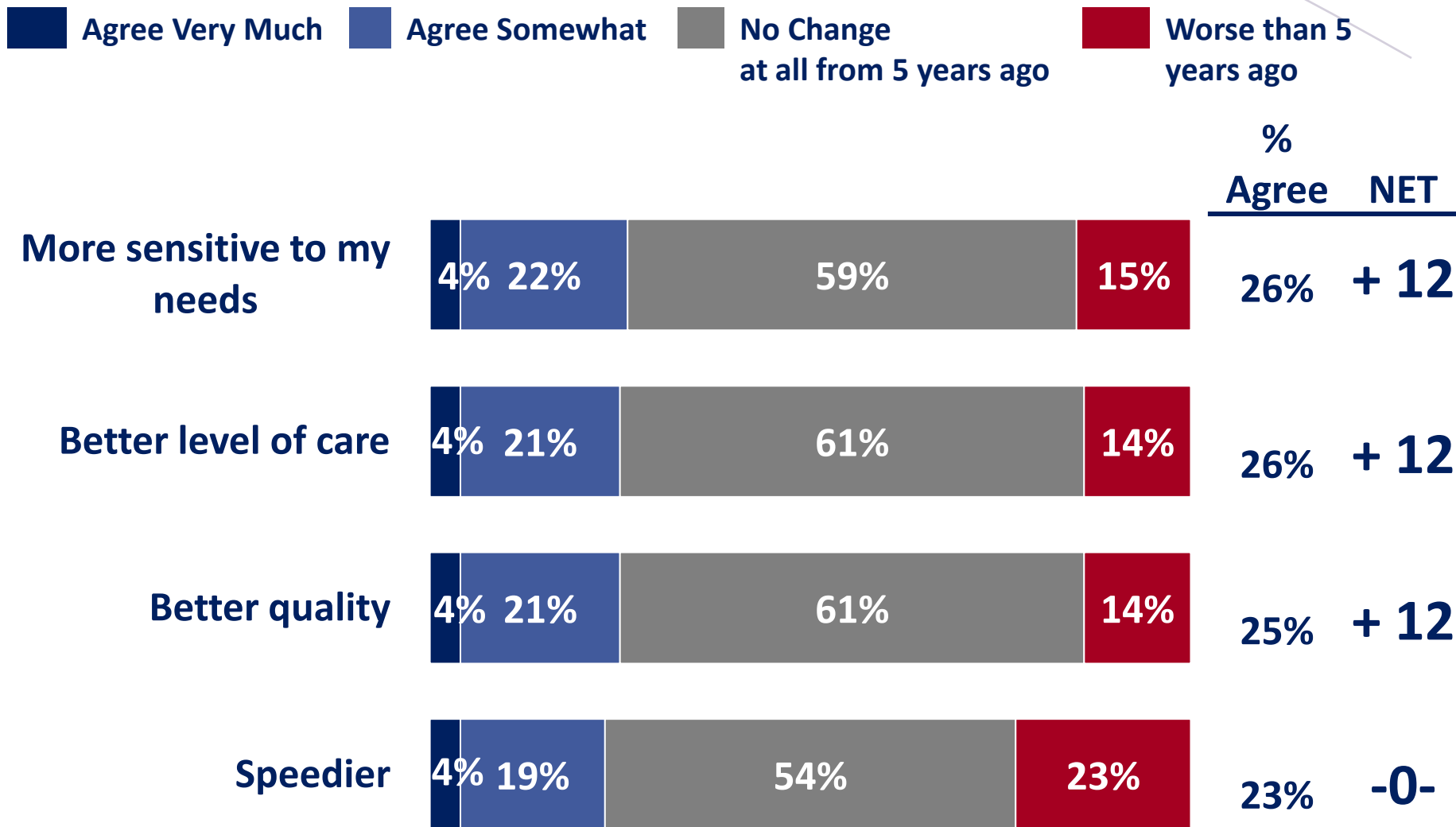
Better coordinated



28% + 14

Q3. Now thinking about your patient experience recently compared to five years ago (in 2008) in going to a doctor and then being diagnosed, referred to a specialist or for surgery, or treated for an accident or serious ailment or condition, have you found it to be: Base: Canadians aged 18-65 (n=1000)

Nationally—Somewhat Improved Patient Experience With These... But Not in Speed...



Q3. Now thinking about your patient experience recently compared to five years ago (in 2008) in going to a doctor and then being diagnosed, referred to a specialist or for surgery, or treated for an accident or serious ailment or condition, have you found it to be: Base: Canadians aged 18-65 (n=1000)

Patient Experience – Compared to 5 Years Ago

REGIONAL NET SCORES

	OVERALL	BC	AB	SK/MB	ON	QC	ATL
Better information shared	18	8 ☒	28 ☑	14	19	22	15
More options for treatment	16	4 ☒	23 ☑	17	18	14	16
Better level of care	12	3 ☒	11	13	10	21 ☑	3
Better coordinated	14	7 ☒	18 ☑	11	12	18 ☑	14
More sensitive to needs	12	3 ☒	7	20 ☑	10	15	15
Better quality	12	1 ☒	16	9	11	18 ☑	8
Speedier	0	-6 ☒	-2	3	8 ☑	0	-3
Net Total	+84	+20 ☒	+101	+87	+88	+108 ☑	+68

 Positive
  Negative

☑ Highest of Regions that Category ☒ Lowest of Regions that Category

Patient Experience – Compared to 5 Years Ago



Regional Net Scores:

MOST Improved

LEAST Improved

Overall (NET)

QC

+108

BC

+20

Better Information Shared

AB

+28

BC

+8

More Treatment Options

AB

+23

BC

+4

Better Level Of Care

QC

+21

BC

+3

Better Coordinated

AB/QC

+18

BC

+7

More Sensitive To Needs

SK/MB

+20

BC

+3

Better Quality

QC

+18

BC

+1

Speedier

ON



+8

BC

-6

ADDING IT UP

Ease of Access and Patient Experience – Combined – Compared to 5 Years Ago - NET SCORES

Rank:							
		#5	#3 (Tie)	#2	#1	#3 (Tie)	#4
	OVERALL	BC	AB	SK/MB	ON	QC	ATL
NET TOTAL ACCESS	+20	-9	-4	+50	+55 <input checked="" type="checkbox"/>	-11	-13 <input checked="" type="checkbox"/>
NET TOTAL EXPERIENCE	+84	+20 <input checked="" type="checkbox"/>	+101	+87	+88	+108 <input checked="" type="checkbox"/>	+68
NET TOTAL	+104	+11 <input checked="" type="checkbox"/>	+97	+137	+143 <input checked="" type="checkbox"/>	+97	+55



Positive



Negative



Highest of Regions that Category



Lowest of Regions that Category

*Net scores were determined on select questions by removing those who felt there was “no change” and then calculating the difference from the positive and negative results.

THREE OTHER SECTIONS:

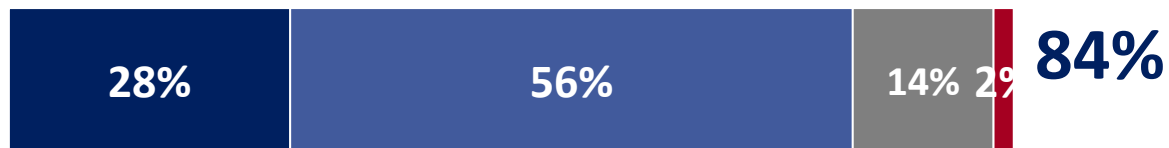
- 1. Care & Compassion**
- 2. Coordination & Communication**
- 3. Efficiency of Time and Money**

CARE AND COMPASSION—Agreement With Statements:

Agree Very Much
 Agree Somewhat
 Disagree Somewhat
 Disagree Very Much

% AGREE

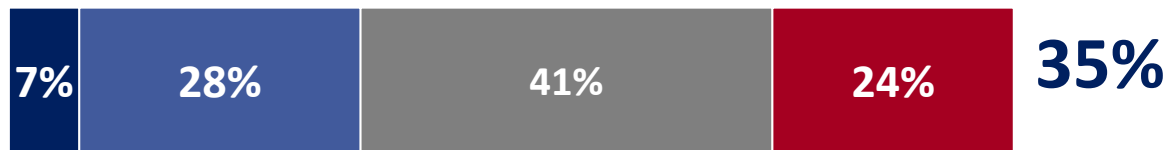
Generally, as a patient I am treated with respect and sensitivity when I'm interacting with health care providers



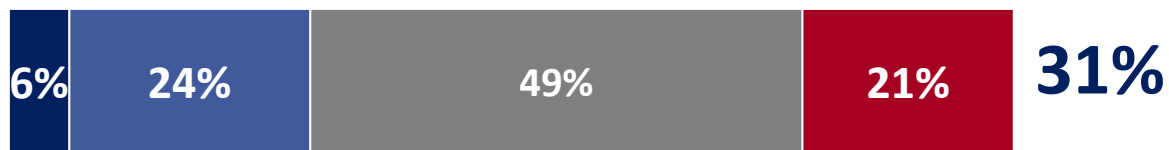
My experience has made me not trust any process in the healthcare system or its professionals: I personally stay on top of everything, whether for me or my family, and I question, monitor and demand full explanations for decisions along the way and thereafter



I feel abandoned and on my own to figure out what to do next



I'm scared to be referred to other parts of the healthcare system because ultimately my experience in terms of how others treat me for my ailment will be bad



Q5. Now we'd like you to think about the times over the past two years when you have been referred by your doctor or caregiver as a patient to other parts of the healthcare system for tests, extra diagnosis or actual treatment. Do you agree or disagree with the following statements...When I am referred to other parts of the healthcare system as a patient to be diagnosed further or treated: Base: Canadians aged 18-65 (n=1000)

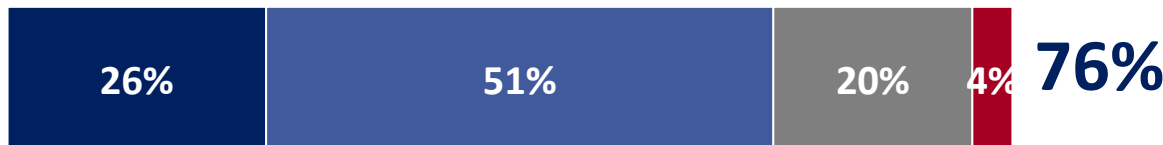
COORDINATION AND COMMUNICATION

Agreement With Statements:

Agree Very Much
 Agree Somewhat
 Disagree Somewhat
 Disagree Very Much

% AGREE

My personal Doctor who refers me is always up to date with information about my diagnosis and treatment



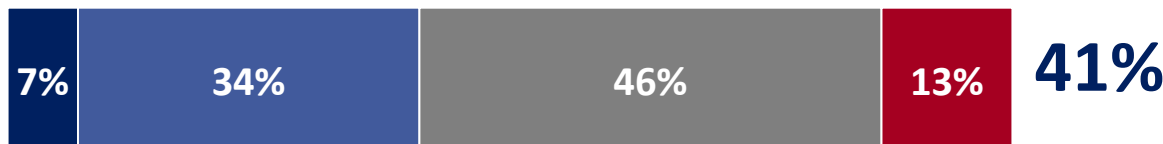
I am confident that once I am referred into the healthcare system for further diagnosis and treatment that the doctor or caregiver that referred me will get continuous updates and copies of what's happening to me so everything is in one place



It is really very easy where all of the doctors and caregivers talk to each other along the way and know what the other person has done or is doing



It seems that no parts of the diagnosis and treatment process are coordinated to get regular and important information about my condition

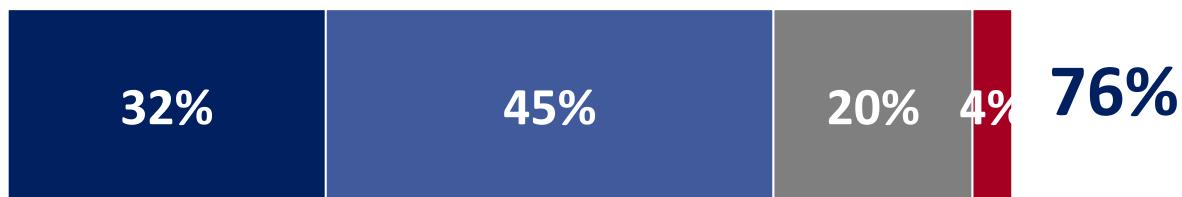


EFFICIENCY AND RESOURCES—Agreement With Statements:

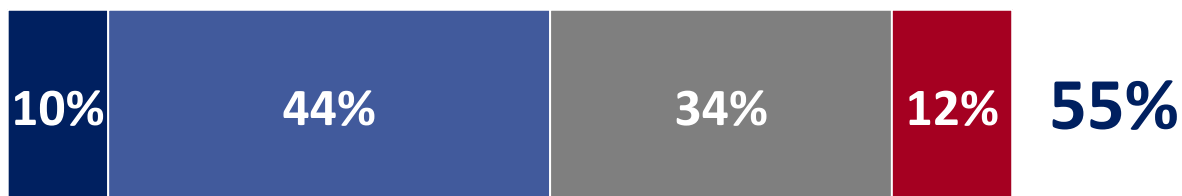
Agree Very Much
 Agree Somewhat
 Disagree Somewhat
 Disagree Very Much

% AGREE

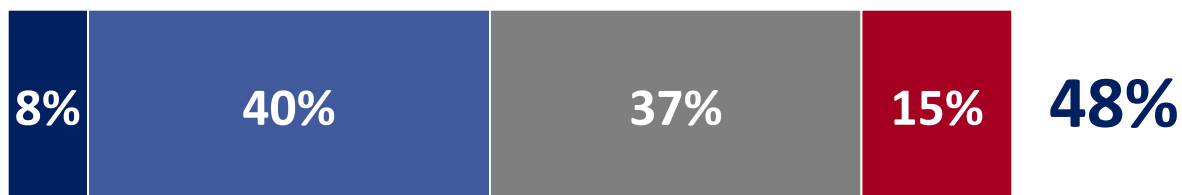
If a diagnosis came back to my doctor that was bad and I required urgent treatment I know they would call me at home right away and tell me what to do



The healthcare system I experience is efficient in the best possible way without wasting time or effort



The healthcare system I experience is efficient in a way that maximizes the use of dollars allocated or paid for healthcare in ways that don't waste money or resources



Q5. Do you agree or disagree with the following statements...When I am referred to other parts of the healthcare system as a patient to be diagnosed further or treated:
Base: Canadians aged 18-65 (n=1000)

Agreement/Disagreement with Statements on **CARE AND COMPASSION:**

Net Gap Scores by Region

Generally, as a patient I am treated with respect and sensitivity when I'm interacting with health care providers

I'm scared to be referred to other parts of the healthcare system because ultimately my experience in terms of how others treat me for my ailment will be bad
(results *inverse to actual Q*)

I feel abandoned and on my own to figure out what to do next (results *inverse to actual Q*)

My experience has made me trust any process in the healthcare system or its professionals: I personally stay on top of everything, whether for me or my family, and I question, monitor and demand full explanations for decisions along the way and thereafter
(results *inverse to actual Q*)

NET TOTAL

Overall	BC	Alberta	Prairies (SK/MB)	Ontario	Quebec	Atlantic
+ 68	+ 74	+ 80	+ 86	+ 62	+ 60	+ 84
+ 38	+50	+ 46	+ 46	+ 38	+ 26	+ 60
+ 30	+ 22	+ 44	+ 18	+ 42	+ 6	+ 56
+ 14	+ 22	+ 14	+ 14	+ 22	- 6	+ 32
+ 150	+ 168	+ 184	+ 164	+ 164	+ 86	+ 232



Highest Region in Category



Lowest Region in Category

Agreement/Disagreement with Statements on **COORDINATION AND COMMUNICATION**

Net Gap Scores by Region

	Overall	BC	Alberta	Prairies (SK/MB)	Ontario	Quebec	Atlantic
My personal Doctor who refers me is always up to date with information about my diagnosis and treatment	+ 52	+ 52	+ 45	+ 34	+ 54	+ 54	+ 64
I am confident that once I am referred into the healthcare system for further diagnosis and treatment that the doctor or caregiver that referred me will get continuous updates/copies of what's happening to me so everything is in one place	+ 36	+34	+ 38	+ 18	+ 36	+ 42	+ 42
It is really very easy where all of the doctors and caregivers talk to each other along the way and know what the other person has done or is doing	+28	+ 12	+ 12	+ 4	+ 24	+ 54	+ 26
It seems that no parts of the diagnosis and treatment process are coordinated to get regular and important information about my condition	+ 18	+ 10	+ 28	+ 26	+ 28	- 6	+ 44
If a diagnosis came back to my doctor that was bad and I required urgent treatment I know they would call me at home right away and tell me what to do	+ 52	+ 54	+ 68	+ 52	+ 50	+ 48	+ 54
NET TOTAL	+ 186	+ 162	+ 191	+ 134	+ 192	+ 192	+ 230



Highest Region in Category



Lowest Region in Category

Agreement / Disagreement with Statements about **EFFICIENCY OF TIME AND MONEY**

NET GAP SCORES BY REGION

The healthcare system I experience is efficient in the best possible way without wasting time or effort

The healthcare system I experience is efficient in a way that maximizes the use of dollars allocated or paid for healthcare in ways that don't waste money or resources

NET TOTAL

Overall	BC	Alberta	Prairies (SK/MB)	Ontario	Quebec	Atlantic
+ 10	- 24	- 0 -	+ 10	+ 6	+ 30	+ 28
- 4	- 12	+ 6	+ 20	- 4	- 10	+ 4
+ 6	- 36	+ 6	+ 30	+ 2	+ 20	+ 32



Highest Region in Category



Lowest Region in Category

Adding it All Up— The Net Scores Combined

GAP NET SCORES	OVERALL	BC	AB	SK/MB	ON	QC	ATL
Ease of Access & Patient Experience	+ 104	+ 11	+ 97	+ 137	+ 143	+ 97	+ 55
Care and Compassion	+ 150	+ 168	+ 184	+ 164	+ 164	+ 86	+ 232
Coordination and Communication	+ 186	+ 162	+ 191	+ 134	+ 192	+ 192	+ 230
Efficiency of Time and Money	+ 6	- 36	+ 6	+ 30	+ 2	+ 20	+ 32
NET TOTAL	+ 446	+ 305	+ 478	+ 465	+ 501	+ 395	+ 549



Highest Region in Category



Lowest Region in Category

Points To Ponder

Before anyone Pops the Champagne Cork...

**A Majority of Canadians Don't See any
Change in Ease of Access Over the Past Five
Years...**

Drugs	60%
Test for diagnosis	55%
A doctor	53%
A hospital	55%
Specialist such as surgeon	51%
NET AVERAGE	55%

Points to Ponder...

The Same With A Majority of Canadians Who Don't See any Change in their Patient Experience Over the Past Five Years...

Better information Shared With Me	58%
More Options Given To Me For Treatment	60%
Better Coordinated	58%
More Sensitive To my Needs	59%
Better Level of Care	61%
Better Quality	61%
Speedier	54%
NET AVERAGE	59%

Points to Ponder...

- Overall, things are getting better, not worse...and certain Provinces and Regions trump others...
- So, take your score cards home and study them...
- But it raises a fundamental question:
- After pumping \$Billions and \$Billions into the collective healthcare system—with provincial government healthcare budgets growing ever so vastly, do we want the public to feel better or do we want them to opt for something else?

Points to Ponder...

- If the institutions and key stakeholders in a public system continually form parades that chant that the system is chronically underfunded, when does the accountability hammer fall or when do citizen-patients opt for other ways?
- The latter may be a desirable motive for some—a more privatized system—which may be inevitable given the growing aging population and even more challenges...
- But if we are doing better should we not be celebrating those successes?

Thank you very much...



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