

HEALTHCARE IN CANADA 2022

Montreal Economic Institute

Research Report
November 2022

© 2022 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.



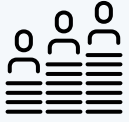
MEI

Ideas for a
More Prosperous
Society



Ipsos

Methodology



These are findings of an online Ipsos poll conducted on behalf of the Montreal Economic Institute.



A sample of 1,174 Canadian residents aged 18 years and over, with an oversample of 400 residents in Quebec, was interviewed between the 25th and 28th of October 2022.

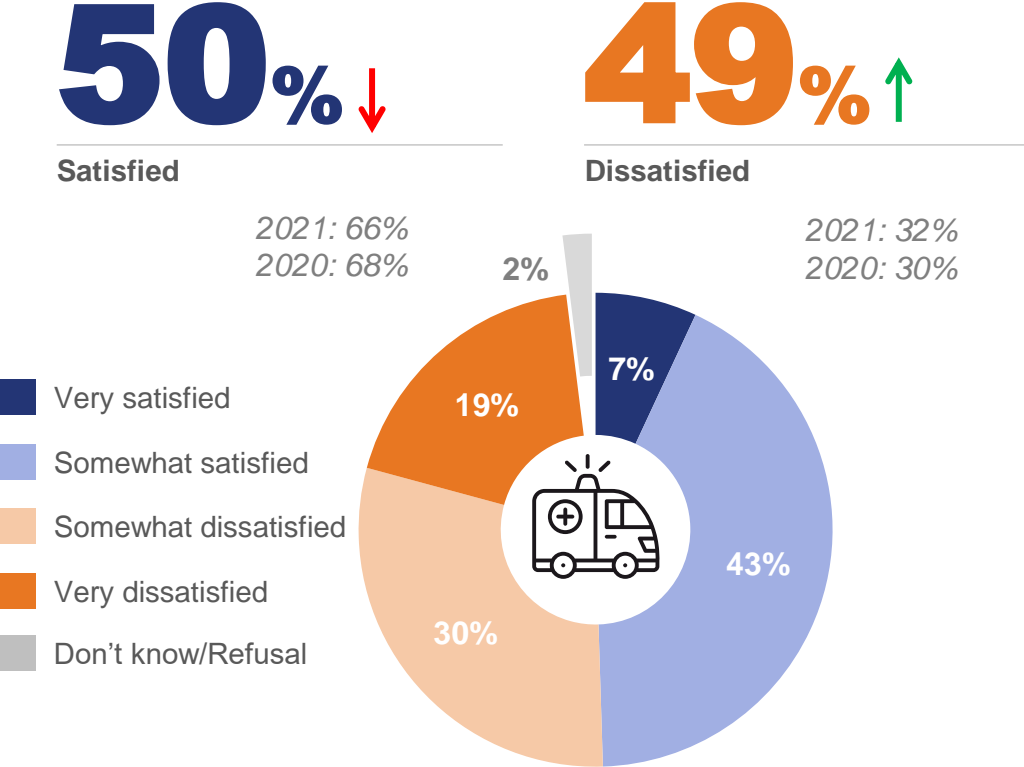


Weighting according to age, gender, region and language was employed to ensure that the sample's composition reflects the overall population according to the latest census information.



The precision of Ipsos online polls is measured using a credibility interval. In this case, the results are accurate to within +/- **3.3 percentage points, 19 times out of 20**, of what the results would have been had all Canadian adults been polled.

Steep decline in Canadians' satisfaction with the provincial health system over the last year; half of Canadians are unsatisfied.



Satisfaction with province's health care system

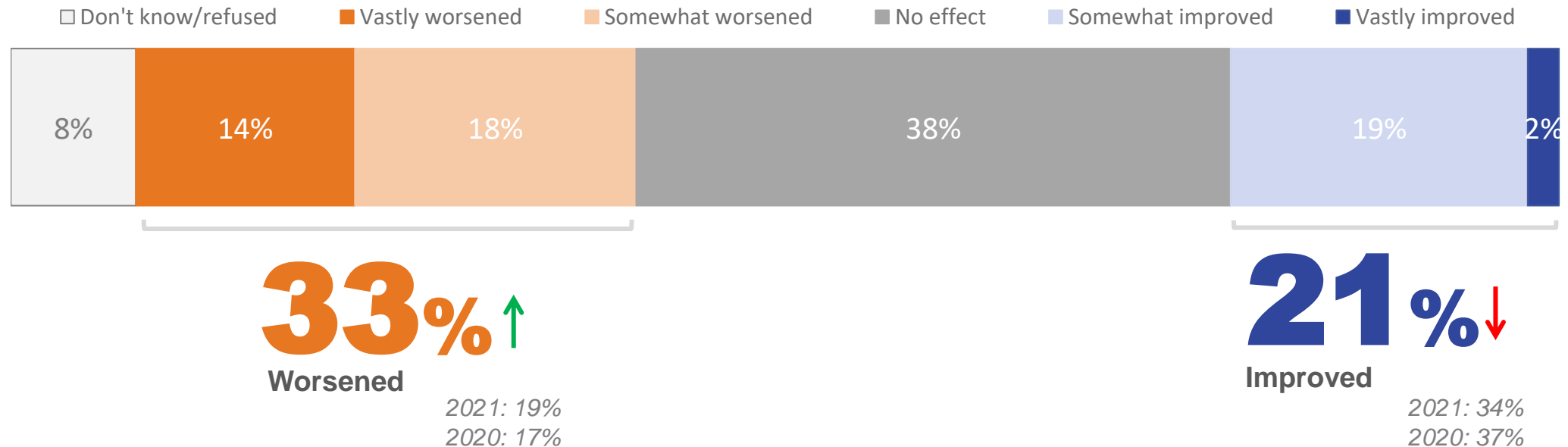
Q1. In general, are you satisfied or dissatisfied with your province's health care system?
Base: All respondents 2022: (n=1,174); 2021: (n=1,168); 2020: (n=1,150).

↑ ↓ Significantly higher or lower compared to previous wave

Satisfaction with the provincial health system by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Satisfied (Very/Somewhat)	50%	55% BC	47%	48%	54% E	45%	51% K	54% K	55% K	53% JK	46% K	30%
Dissatisfied (Very/Somewhat)	49%	43%	52% A	50% A	45%	53% D	49%	44%	45%	45%	52% I	70% FGHIJ

A plurality of Canadians (38%) say that additional amounts injected into the healthcare system have had no effect. A third think that it has deteriorated (33%) – a 14-point increase.



Q2. In your opinion, have the additional amounts injected into the healthcare system over the past ten years by the government of your province improved the healthcare system?
 Base: All respondents 2022: (n=1,174); 2021: (n=1,168); 2020: (n=1,150).

↑ ↓ Significantly higher or lower compared to previous wave

Improvement of the healthcare system by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Improved (Very/Somewhat)	21%	27% BC	20%	19%	28% E	15%	25% K	25% K	27% K	22% K	19%	11%
Worsened (Very/Somewhat)	33%	24%	32% A	39% AB	31%	34%	30%	27%	30%	34%	30%	51% FGHIJ

Half of Canadians (52%) would allow increased access to private healthcare services, a 6-point decrease since 2021; A third disagree – an increase of 5 points.

52% ↓

Agree

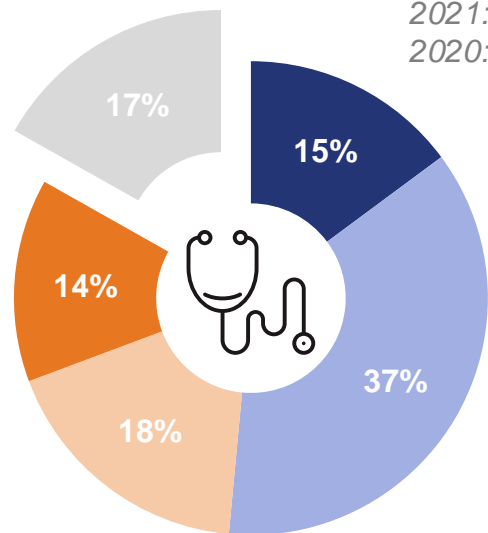
2021: 58%
2020: 63%

32% ↑

Disagree

2021: 27%
2020: 23%

- Completely agree
- Somewhat agree
- Somewhat disagree
- Completely disagree
- Don't know/refused



Access to independent health entrepreneurs

Q3. Would you agree or disagree that governments in Canada allow patients increased access to healthcare services provided by independent health entrepreneurs?
Base: All respondents 2022: (n=1,174); 2021: (n=1,168); 2020: (n=1,150).

↑ ↓ Significantly higher or lower compared to previous wave

Access to private healthcare by socio-demographic group

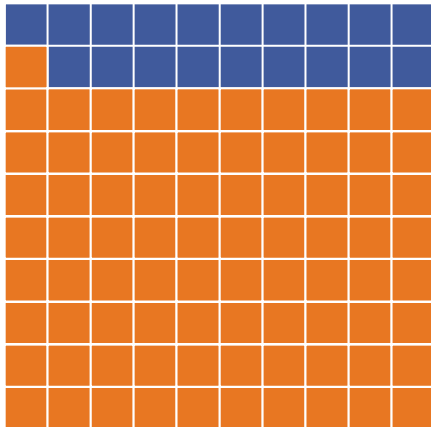
	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Agree (Completely/Somewhat)	52%	52%	52%	52%	55% E	49%	55% HI	50%	41%	44%	67% FGHIK	51%
Disagree (Completely/Somewhat)	32%	29%	31%	34%	33%	30%	31% J	33% J	26%	37% J	22%	34% J

Eight in ten Canadians (81%) are unaware of the French or Swedish healthcare models.

19%

Yes

2021: 17%



81%

No

2021: 83%

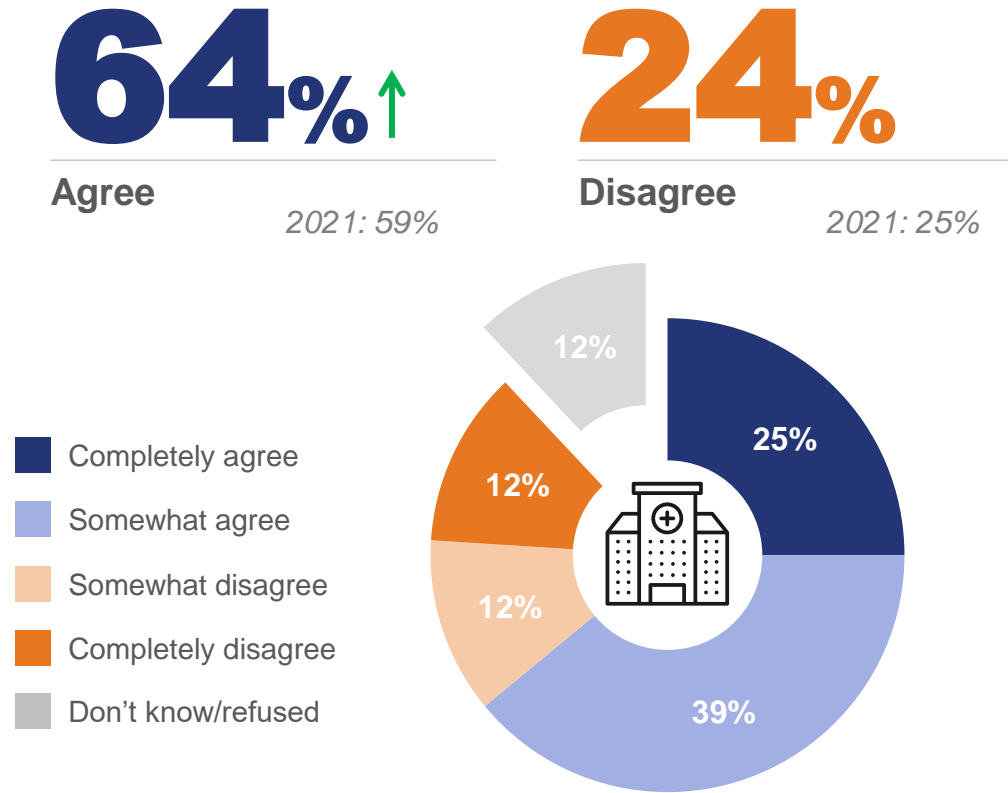
Awareness of the French or Swedish models

↑↓ Significantly higher or lower compared to previous wave

Awareness of the French or Swedish models by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Yes	19%	19%	20%	18%	25% E	13%	22% H	19%	10%	18%	20% H	23% H
No	81%	81%	80%	82%	75%	87% D	78%	81%	90% FJK	82%	80%	77%

Almost two-thirds (64%) of Canadians agree that the healthcare system should follow the French/Swedish model, a 5-point increase.



Applying the French/Swedish healthcare models

Q5. To what extent do you agree or disagree that Canada should follow this 'French or Swedish model' and allow private entrepreneurs to manage some public hospitals, provided that medically required care remains covered and fully reimbursed by the government?
Base: All respondents 2022: (n=1,174); 2021: (n=1,168).

↑ ↓ Significantly higher or lower compared to previous wave

Applying the French/Swedish healthcare models by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Agree (Completely/Somewhat)	64%	63%	66%	63%	62%	66%	60%	58%	69%	58%	73% FGI	76% FGI
Disagree (Completely/Somewhat)	24%	25%	22%	26%	29% E	20%	24%	31% JK	19%	30% HJK	17%	14%

More than three-quarters of Canadians (77%) think their provincial healthcare system is too bureaucratic – a 6-point increase.

77% ↑

Agree

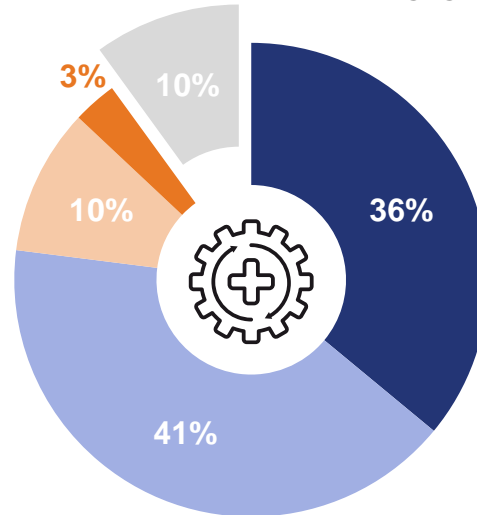
2021: 71%
2020: 61%

13% ↓

Disagree

2021: 18%
2020: 24%

- Completely agree
- Somewhat agree
- Somewhat disagree
- Completely disagree
- Don't know/refused



My province's health care system is too bureaucratic

Q6_1. To what extent do you agree or disagree with the following: My province's healthcare system is too bureaucratic to respond quickly or adequately to the needs of the population.
Base: All respondents 2022: (n=1,174); 2021: (n=1,168); 2020: (n=1,150).

↑ ↓ Significantly higher or lower compared to previous wave

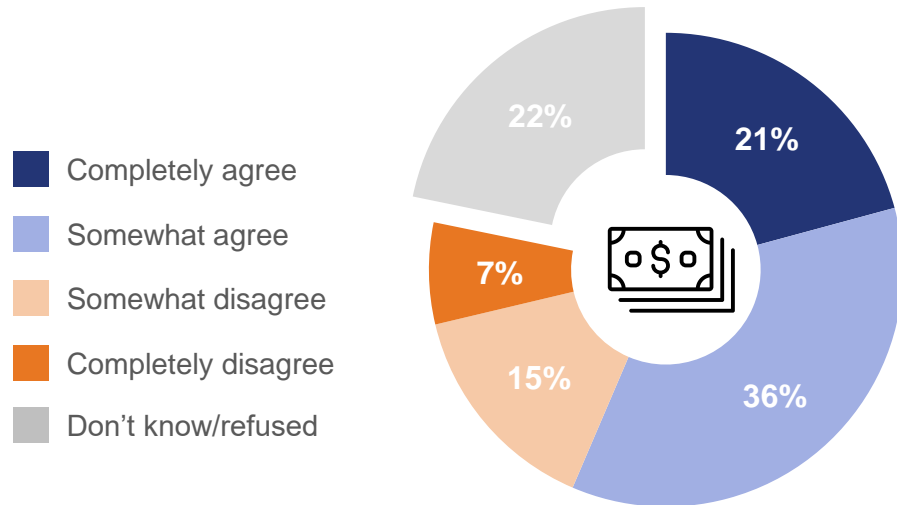
The bureaucratic nature of the healthcare system by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Agree (Completely/Somewhat)	77%	68%	78%	82%	77%	77%	70%	74%	76%	74%	84% FGI	85% FGI
Disagree (Completely/Somewhat)	13%	19% BC	11%	10%	14%	12%	16% JK	15% JK	15% JK	15% JK	8%	6%

A majority of Canadians (57%) believe that the rate of spending increase in healthcare is unsustainable.

57% ↑
Agree 2021: 52%

21%
Disagree 2021: 23%



Spending increase in public health care is unsustainable

↑ ↓ Significantly higher or lower compared to previous wave

Q6_2. To what extent do you agree or disagree with the following: The rate of spending increase in my province's public healthcare system is unsustainable
Base: All respondents 2022: (n=1,174); 2021: (n=1,168).

Sustainability of spending in healthcare by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Agree (Completely/Somewhat)	57%	52%	56%	61% A	59%	55%	59% G	44%	52%	53%	69% FGHI	61% G
Disagree (Completely/Somewhat)	21%	26% BC	20%	19%	24% E	19%	20% J	33% FIJK	22% J	24% J	12%	22% J

Q6_2. To what extent do you agree or disagree with the following: The rate of spending increase in my province's public healthcare system is unsustainable
 Base: All respondents 2022 (n=1,174).

Six in ten Canadians (60%) believe that the healthcare system should be more decentralized to enable hospitals to be more autonomous.

60%

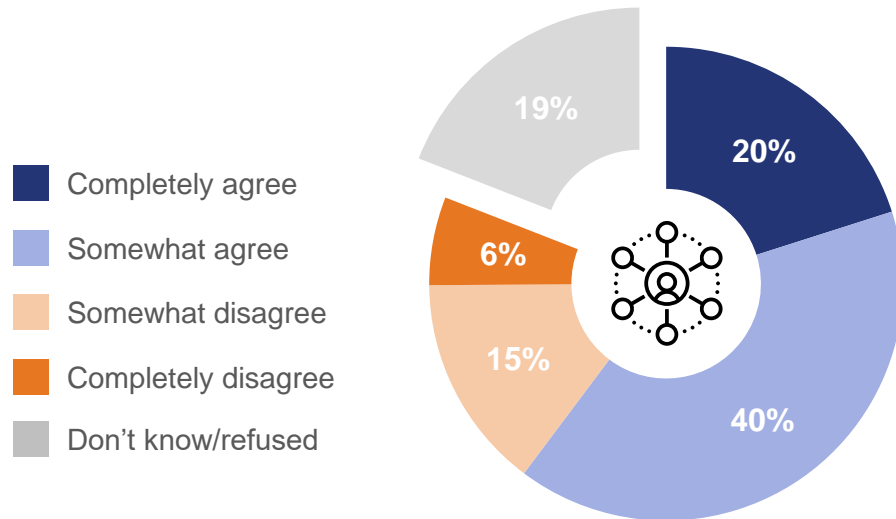
Agree

2021: 62%

21%

Disagree

2021: 19%



My province's health care system should be decentralized

Q6_3. To what extent do you agree or disagree with the following: the healthcare system should be more decentralized and allow hospitals to be more autonomous and remunerated on the basis of the services they actually deliver
Base: All respondents 2022: (n=1,174); 2021: (n=1,168).



Significantly higher or lower compared to previous wave

The decentralization of the healthcare system by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	BC	AB	SK/MB	ONT	QC	ATL
		A	B	C	D	E	F	G	H	I	J	K
Agree (Completely/Somewhat)	60%	55%	62% A	62% A	65% E	55%	58% G	47%	66% G	55%	75% FGIK	57%
Disagree (Completely/Somewhat)	21%	26% BC	19%	19%	22%	20%	19% J	30% FJ	20% J	25% J	11%	23% J

About Ipsos

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.