

HEALTHCARE IN CANADA 2024

Montreal Economic Institute

Research report

April 2024



MEI



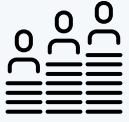
Ipsos

Emergency
Entrance →

Main →
Entrance

© 2024 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

Methodology



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



A sample of 1,116 Canadian residents aged 18 years and over, with an oversample of residents in Quebec (n=406) was interviewed online between March 22nd and 27th, 2024.



Weighting and quotas according to age, gender, region and language were 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.

Key Findings

1

Less than half (48%) of Canadians are **satisfied with their provincial healthcare system**, similar to 2023 figures. Satisfaction is lowest among residents of Atlantic Canada (30%).

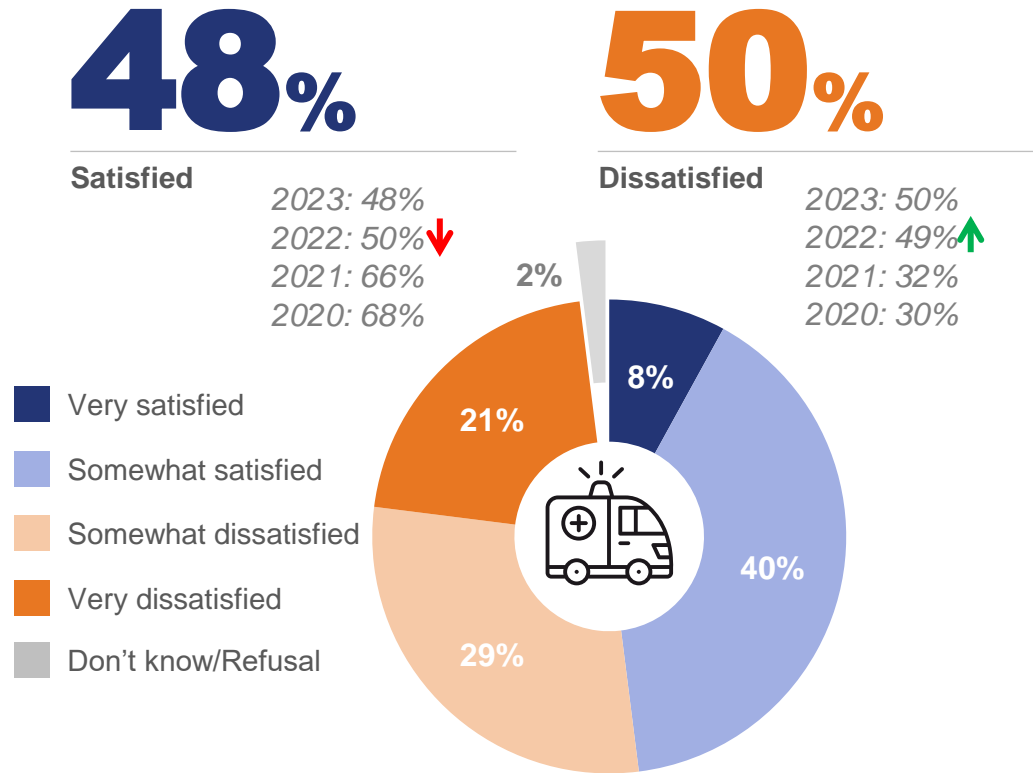
2

More than three-quarters of Canadians (78%) believe **their provincial healthcare system is too bureaucratic**, a proportion which is higher among those aged 55 and over (83%) and residents of Quebec (87%), as in 2023.

3

Seven in ten Canadians (70%) believe that **private entrepreneurs can deliver healthcare services faster than hospitals managed by the government**, with those residing in Quebec (77%) most likely to think this way.

Less than half (48%) of Canadians are satisfied with their provincial healthcare system, similar to 2023 figures.



Satisfaction with province's healthcare system

Q1. In general, are you satisfied or dissatisfied with your province's healthcare system?

Base: All respondents 2024: (n=1,116), 2023: (n=1,164), 2022: (n=1,174), 2021: (n=1,168), 2020: (n=1,150).

↑ ↓ Significantly higher or lower compared to previous wave

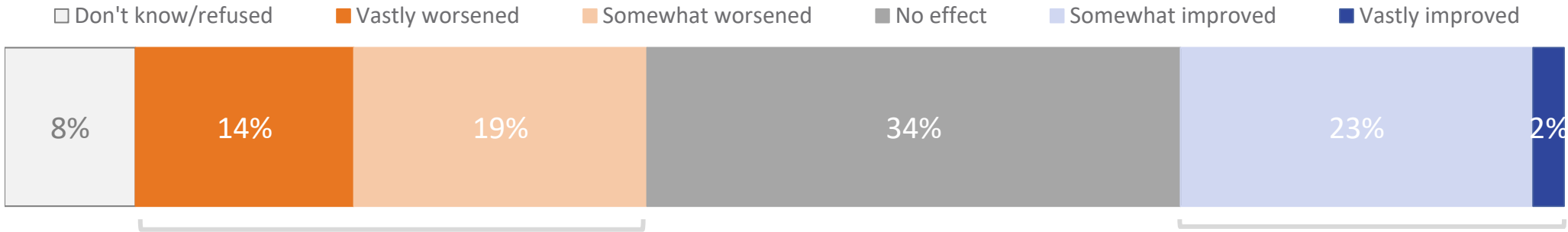
Satisfaction with the provincial health system by socio-demographic group

Women (55%) tend to be more dissatisfied than men (44%), which is also the case for residents of Atlantic Canada (67%).

	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)	47.9%	46.2%	43.1%	53.2% B	53.4% E	42.6%	44.1%	44.2%	50.1% K	53.4% K	47.3% K	30.0%
Dissatisfied (Very/Somewhat)	49.7%	51.8%	52.9% C	45.5%	43.7%	55.4% D	53.5%	53.1%	49.9%	43.4%	51.2% I	67.2% IJ



Only a quarter of Canadians (25%) think additional public funds injected in the healthcare system over the past ten years led to improvements.



33%

Worsened

2023: 30%
 2022: 33% ↑
 2021: 19%
 2020: 17%

25%

Improved

2023: 24%
 2022: 21% ↓
 2021: 34%
 2020: 37%

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 2024: (1,116), 2023: (n=1,164), 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

Women (36%) are more likely to have noticed a deterioration of the healthcare system.

	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)	24.6%	26.0%	19.7%	27.9% B	29.1% E	20.3%	24.9%	19.0%	25.2%	25.3%	26.7%	20.6%
Worsened (Very/Somewhat)	32.8%	30.0%	34.9%	32.9%	29.9%	35.5% D	30.2%	32.1%	33.2%	38.2% J	23.5%	40.4% J

Similar to the last two years, half of Canadians (52%) would like increased access to healthcare provided by independent health entrepreneurs.

52%

Agree

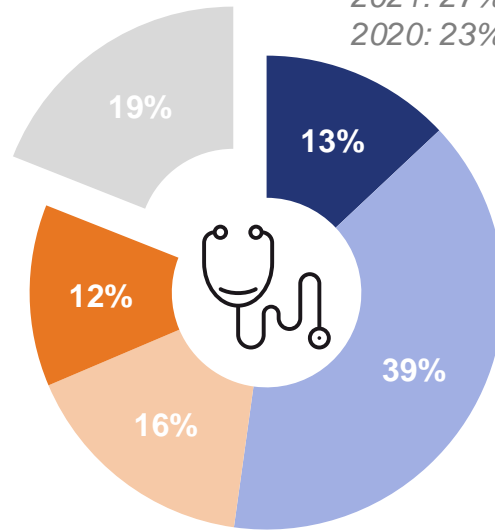
2023:	52%
2022:	52% ↓
2021:	58% ↓
2020:	63%

29%

Disagree

2023:	31%
2022:	32% ↑
2021:	27% ↑
2020:	23%

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly 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?

↑ ↓ Significantly higher or lower compared to previous wave

Access to independent healthcare entrepreneurs by socio-demographic group

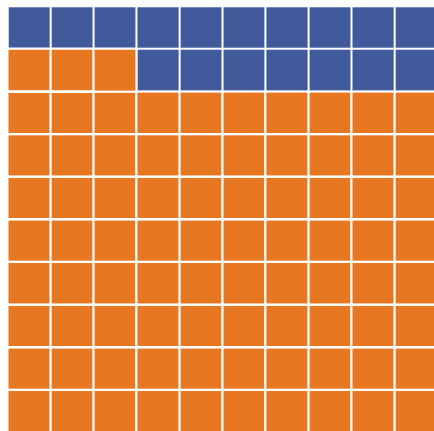
Men (57%) and residents of Quebec (66%) are more likely to want increased access to privately supplied healthcare.

	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 (Strongly/Somewhat)	52.2%	52.1%	49.1%	55.0%	56.5% E	48.2%	51.6%	51.5%	49.6%	46.5%	65.3% FGHIK	44.3%
Disagree (Strongly/Somewhat)	28.8%	29.9%	28.2%	28.6%	28.5%	29.1%	26.8%	27.8%	23.4%	33.9% J	24.2%	26.9%

Stable over time, eight in ten Canadians (83%) are unaware of the French or Swedish healthcare models.

17%

Yes
2023: 19%
2022: 19%
2021: 17%



83%

No
2023: 81%
2022: 81%
2021: 83%

Awareness of the French or Swedish models

↑ ↓ Significantly higher or lower compared to previous wave

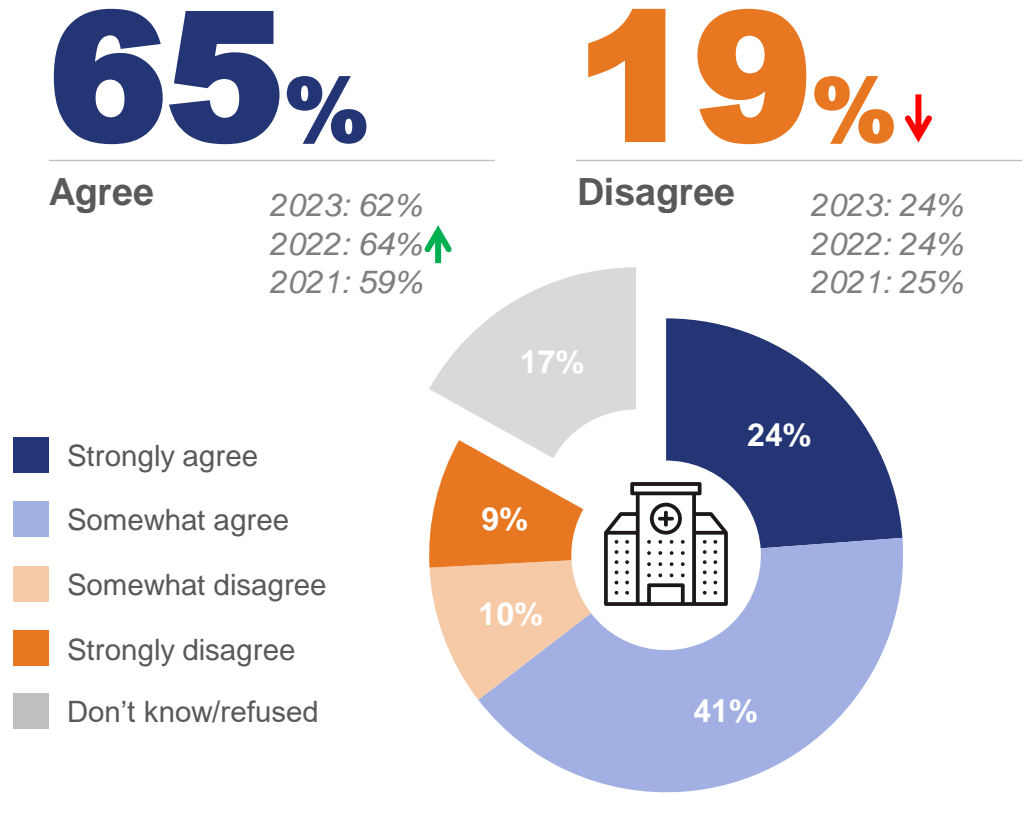
Q4. Did you know that France and Sweden allow private entrepreneurs to manage some public hospitals, while still fully reimbursing patients for the medically required care they receive?

Base: All respondents 2024: (1,116), 2023: (n=1164), 2022: (n=1,174), 2021: (n=1,168).

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	17.4%	20.7%	15.2%	17.0%	23.0% E	12.1%	18.2%	21.4%	15.0%	16.7%	17.5%	15.0%
No	82.6%	79.3%	84.8%	83.0%	77.0%	87.9% D	81.8%	78.6%	85.0%	83.3%	82.5%	85.0%

Over six in ten Canadians (65%) agree that Canada should emulate the French or Swedish healthcare system – a similar proportion to the last two years.



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 2024: (1,116), 2023: (n=1,164), 2022: (n=1,174), 2021: (n=1,168).

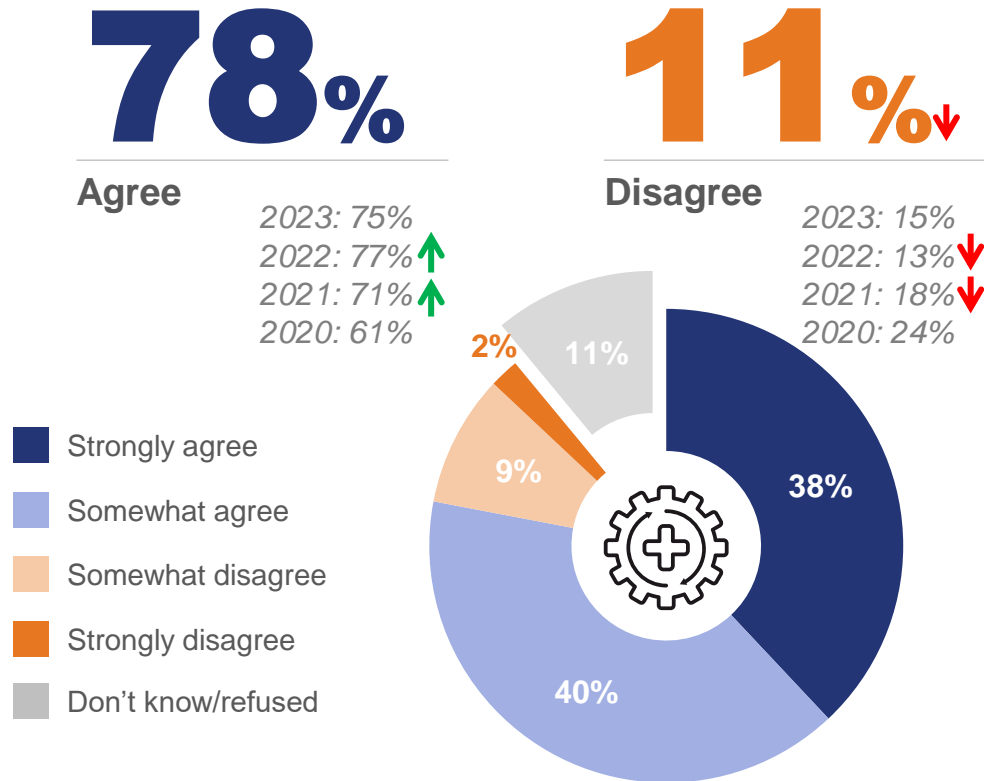
↑ ↓ Significantly higher or lower compared to previous wave

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

Residents of Quebec (75%) are most likely to agree that Canada should follow the French/Swedish model.

	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 (Strongly/Somewhat)	64.5%	66.5% B	59.1%	67.8% B	64.6%	64.4%	62.4%	55.3%	56.7%	64.4%	75.1% FGHIK	55.4%
Disagree (Strongly/Somewhat)	18.6%	15.6%	20.2%	19.2%	21.3% E	15.9%	20.7%	25.2% J	18.3%	18.3%	14.6%	18.9%

More than three-quarters of Canadians (78%) believe their provincial healthcare system is too bureaucratic, a steady increase since 2020.



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 2024: (n=1,116), 2023: (n=1,164), 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

Residents of Quebec (87%) are most likely to agree that their provincial healthcare system is too bureaucratic, which is also the case for those who are aged 55 or more (83%).

	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 (Strongly/Somewhat)	77.9%	72.1%	76.5%	83.2% AB	75.8%	79.9%	75.2%	76.3%	69.0%	74.8%	87.3% FGHI	79.5%
Disagree (Strongly/Somewhat)	10.8%	13.3% C	11.9%	8.1%	13.1% E	8.7%	14.0% HJ	11.3%	3.2%	13.6% HJ	7.2%	7.9%

More than half (58%) of Canadians agree that the rate of spending in their provincial healthcare system is unsustainable.

58%

Agree

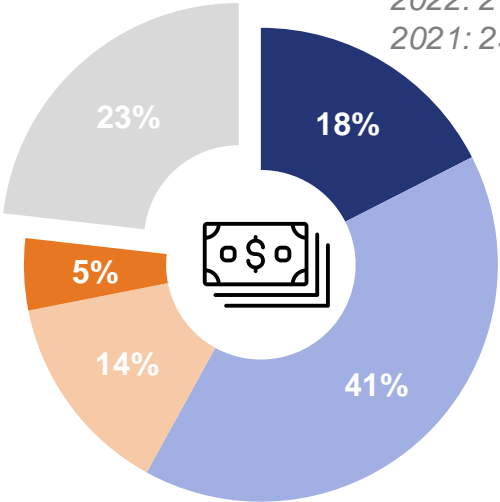
2023: 54%
 2022: 57% ↑
 2021: 52%

19% ↓

Disagree

2023: 24%
 2022: 21%
 2021: 23%

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



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 2024: (1,116), 2023: (n=1,164), 2022: (n=1,174), 2021: (n=1,168).



Sustainability of spending in healthcare by socio-demographic group

Residents of Quebec (71%) are more likely to believe that the rate of spending in the healthcare system is unsustainable.

	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 (Strongly/Somewhat)	58.0%	53.6%	55.3%	63.4% AB	60.0%	56.1%	55.0%	49.1%	53.4%	56.1%	70.6% FGHIK	50.0%
Disagree (Strongly/Somewhat)	18.8%	22.7%	17.5%	17.2%	21.1%	16.6%	21.2% J	24.6% J	17.1%	22.3% J	10.5%	14.7%

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 2024 (n=1,116).

More than six in ten Canadians (62%) believe that the healthcare system should be decentralized – the same percentage as in 2021.

62%

Agree

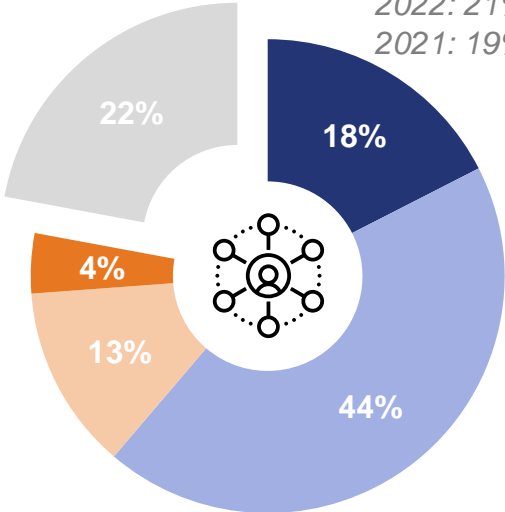
2023: 58%
2022: 60%
2021: 62%

17%↓

Disagree

2023: 22%
2022: 21%
2021: 19%

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



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 2024: (1,116), 2023: (n=1,164), 2022: (n=1,174), 2021: (n=1,168).

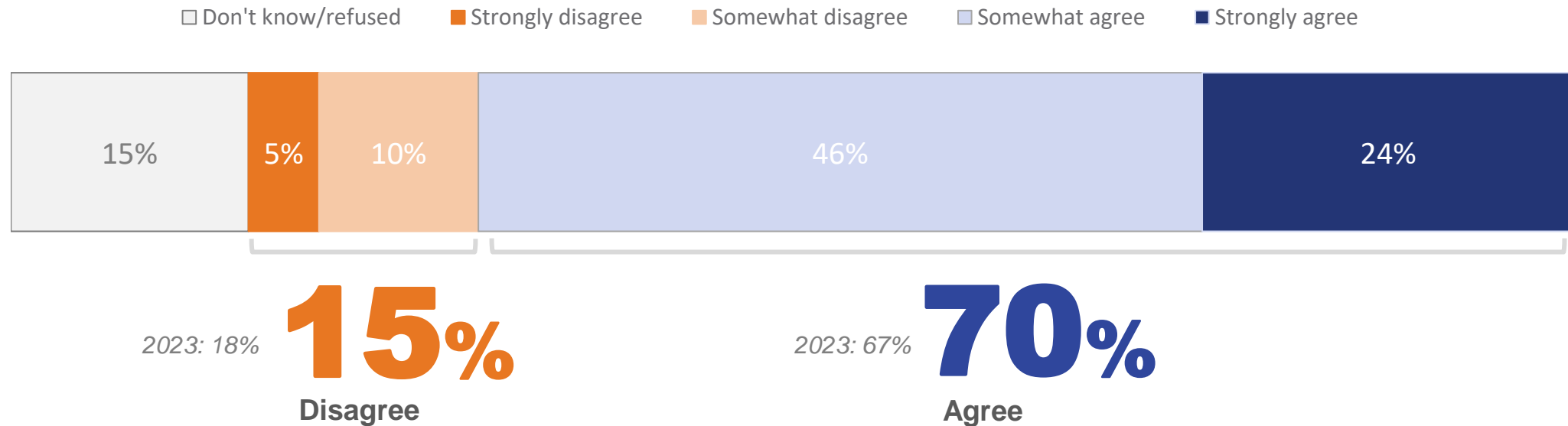
↑ ↓ Significantly higher or lower compared to previous wave

The decentralization of the healthcare system by socio-demographic group

Residents of Quebec (72%) are more likely to agree that the healthcare system should be more decentralized.

	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 (Strongly/Somewhat)	61.2%	58.0%	62.2%	62.7%	65.6% E	57.1%	61.3%	59.0%	47.9%	59.4%	71.8% FGHIK	51.6%
Disagree (Strongly/Somewhat)	16.7%	20.4%	15.0%	15.6%	18.6%	14.9%	17.7%	18.3%	20.8%	16.5%	14.7%	16.4%

Seven in ten Canadians (70%) believe that private entrepreneurs can deliver healthcare services faster than hospitals managed by the government.



Q7. Would you agree or disagree that private healthcare entrepreneurs can deliver services to patients faster than hospitals operated by the government?
Base: All respondents 2023: (n=1,164), 2024: (n=1,116)

Speed of delivery of healthcare services 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 (Strongly/Somewhat)	70.1%	68.3%	69.9%	71.6%	70.1%	70.1%	76.5% G	58.3%	70.3%	68.0%	77.1% G I K	64.3%
Disagree (Strongly/Somewhat)	14.6%	17.3%	15.1%	12.3%	15.8%	13.5%	11.8%	20.2%	8.5%	16.4%	13.2%	12.3%



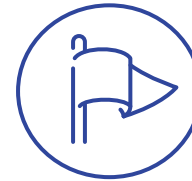
More than seven in ten Quebecers (73%) agree with the government's proposition to open two new mini-hospitals managed by private entrepreneurs

73%

Agree
2023: 69%

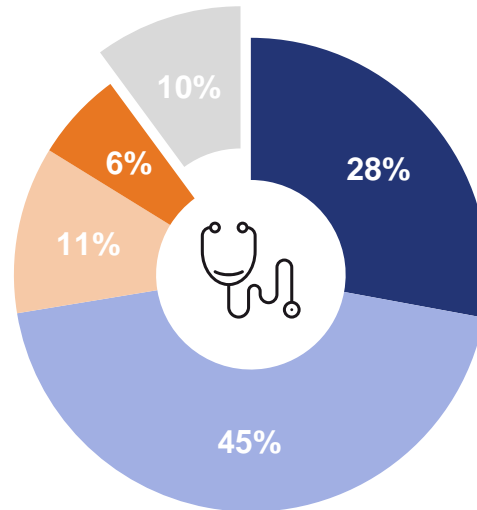
17%

Disagree
2023: 18%



**Quebec
only**

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



Opening two new mini-hospitals in Quebec managed by private entrepreneurs

Q8. Would you agree or disagree with the government of Quebec's proposition to open two new mini-hospitals that would be managed by private entrepreneurs?
Base: Those who live in Quebec 2023: (n=302), 2024: (n=406).

Agreement/disagreement on opening two new mini-hospitals managed by private entrepreneurs by the government of Quebec

	Total	Age			Gender	
		18-34	35-54	55+	Male	Female
		A	B	C	D	E
Agree (Strongly/Somewhat)	72.4%	74.2%	69.5%	73.7%	70.8%	74.0%
Disagree (Strongly/Somewhat)	17.4%	15.6%	18.1%	18.1%	19.9%	15.1%



About Ipsos

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 19,000 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.