



“The Changing Face and Mindset of Health Care”

A Presentation By Allan R. Gregg
To The National Healthline Symposium
Victoria BC, April 28, 2006

Demographic Trends

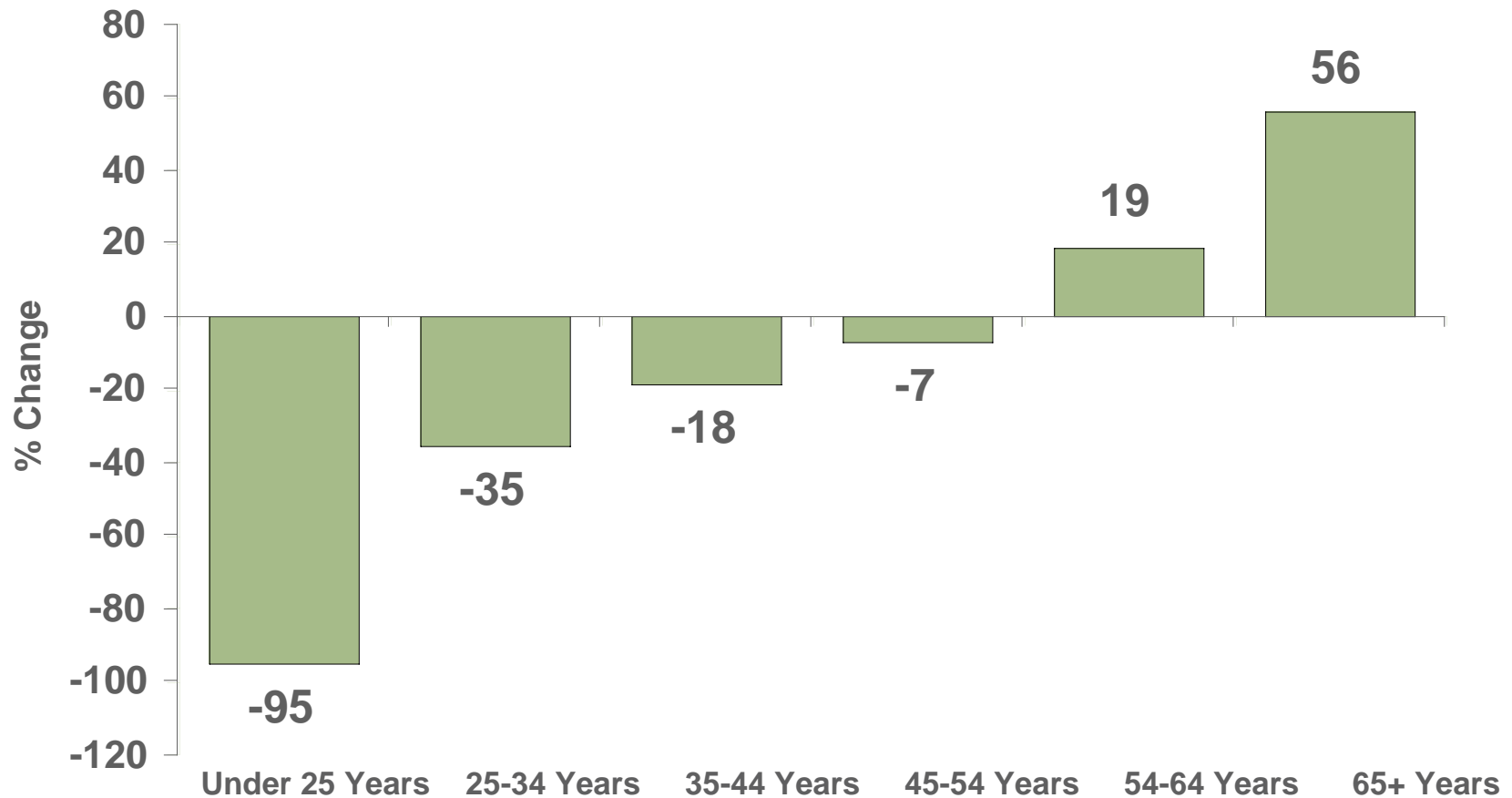
- The aging population
 - ✓ Continuing influence of “The Big Generation”

- Implications for
 - ✓ Canada Pension Plan
 - ✓ Health care spending
 - ✓ Future labour shortages

Demographic Trends

- The prospect of a “new” type of old person

Change In Median Net Worth From 1984 To 1999 – By Age



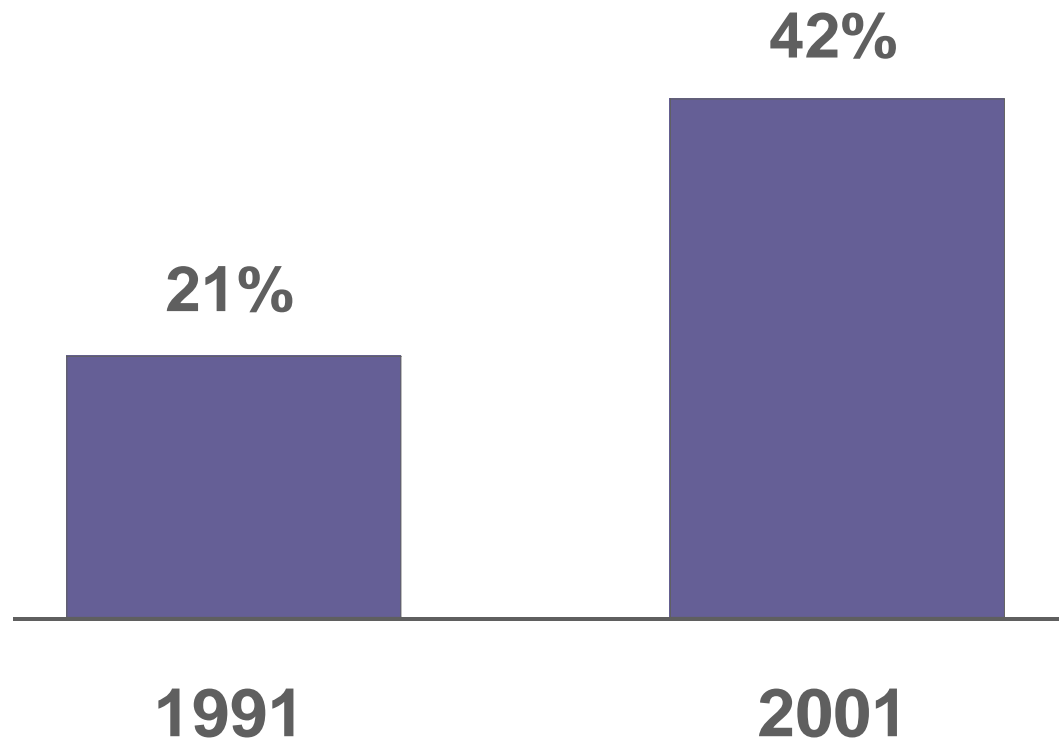
Top 5 Vehicles Purchased By 50 – 59 Years Old

1. BMW Z3
2. Infiniti G35
3. Mercedes CL Class
4. Chevrolet Corvette
5. Lexus RX

Source: The Economist/J.D. Power and Associates (April 2004)

Today's Young Canadians – The Stay-At-Home Generation

Percentage of 20 – 29 year old living with their parents



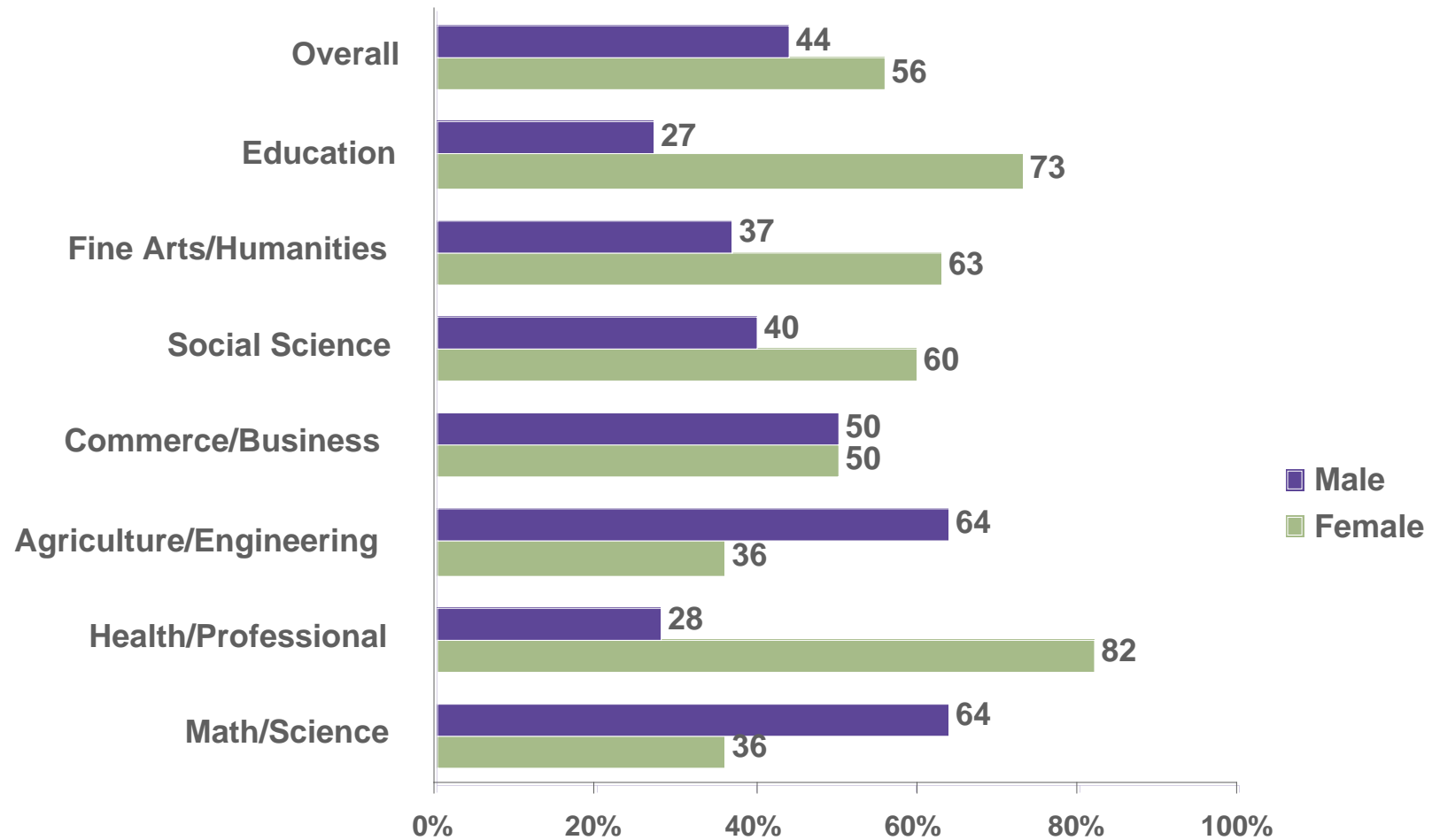
Implications

- Implications for:
 - ✓ The end of ageism
 - ✓ Mandatory retirement
 - ✓ A radical restructuring of health care
 - ✓ Non-traditional and extended family structure
 - ✓ Travel and leisure

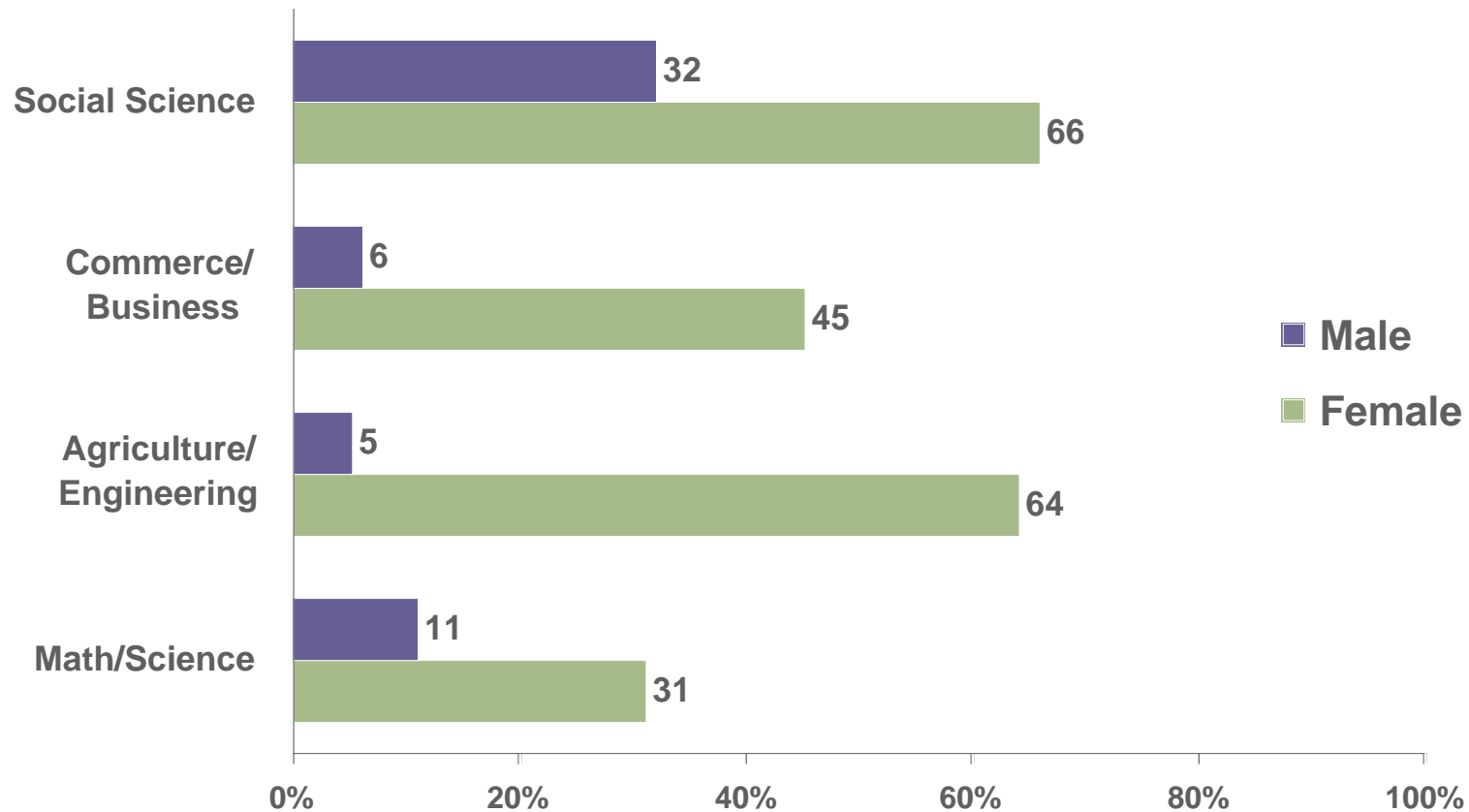
Female Participation in the Workforce

- The on-going acceleration of female participation in the workplace
 - ✓ Driven by education more than economics

University Enrollment By Gender – 1996 Census



Change In University Enrollment In Select Fields By Gender - 1986-96



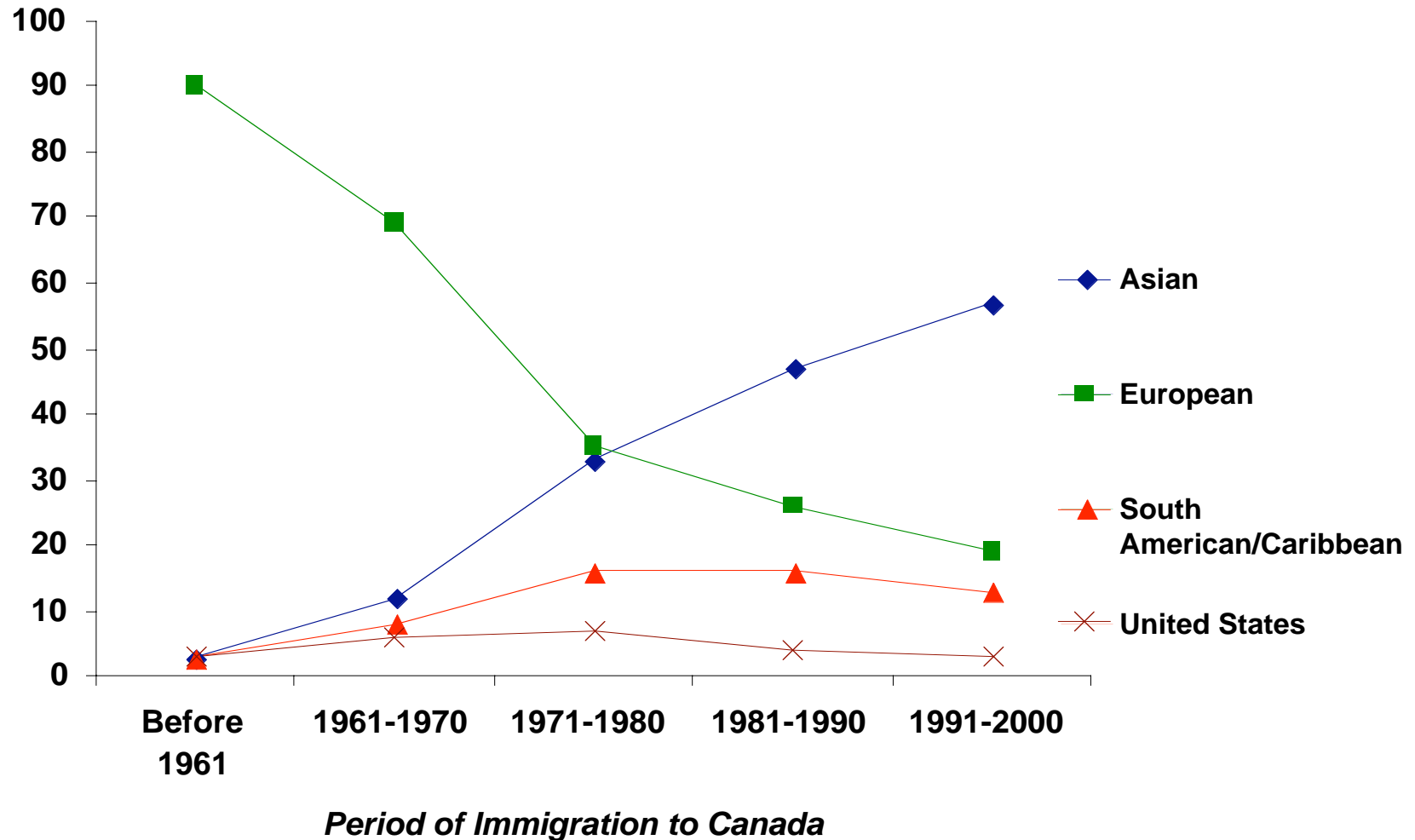
The Glass Ceiling Will Be Broken

- Implications for:
 - ✓ Spousal employment/benefits
 - ✓ The feminization of decision-making
 - ✓ Patterns of family postponement and deferment
 - ✓ “Communal” child rearing

Immigration

- Increasing immigration and the increasing need for immigration
 - ✓ Qualitatively and quantitatively different

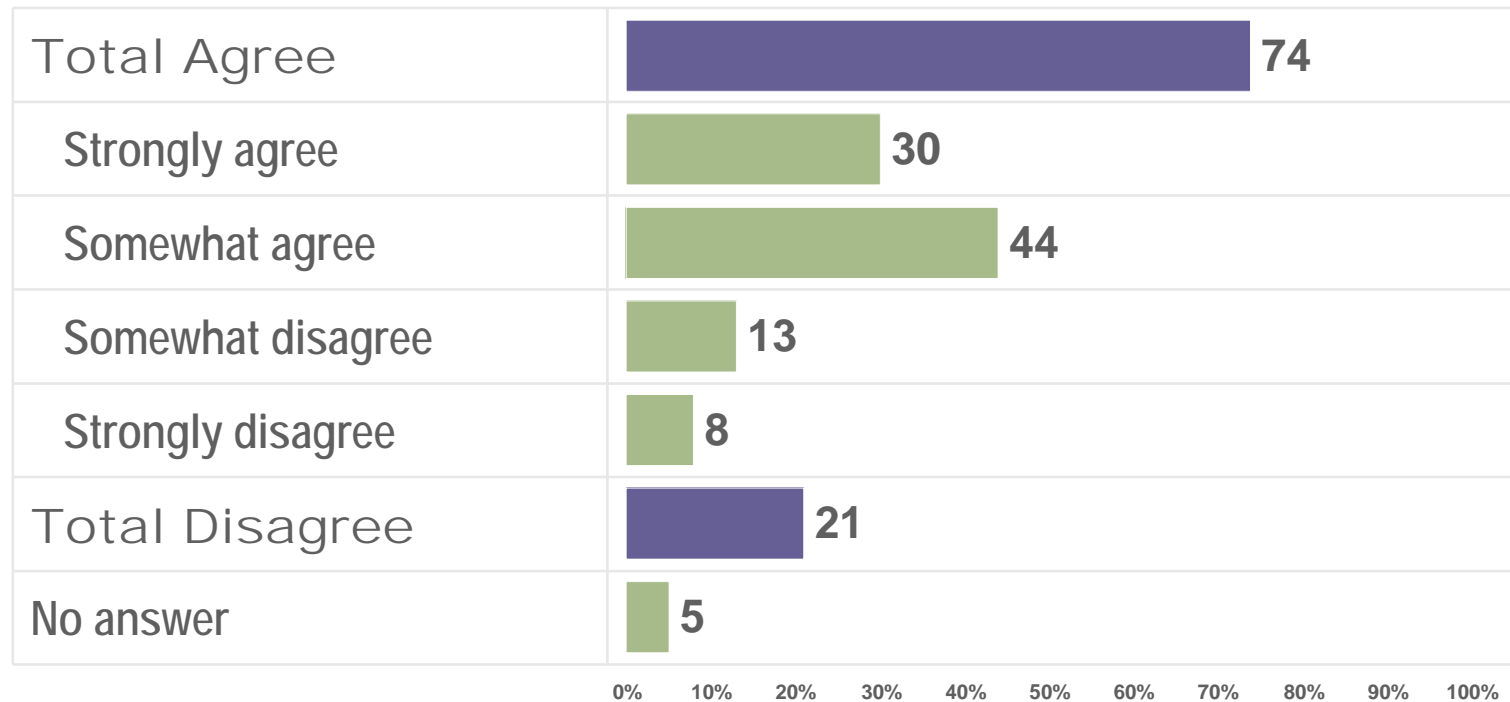
Immigrant Population, By Place of Birth and Period of Immigration



Implications for Changing Nature of Immigration

- Implications for:
 - ✓ Changing patterns of urban development
 - ✓ “Limited” identities
 - ✓ Failure to anticipate the unknown

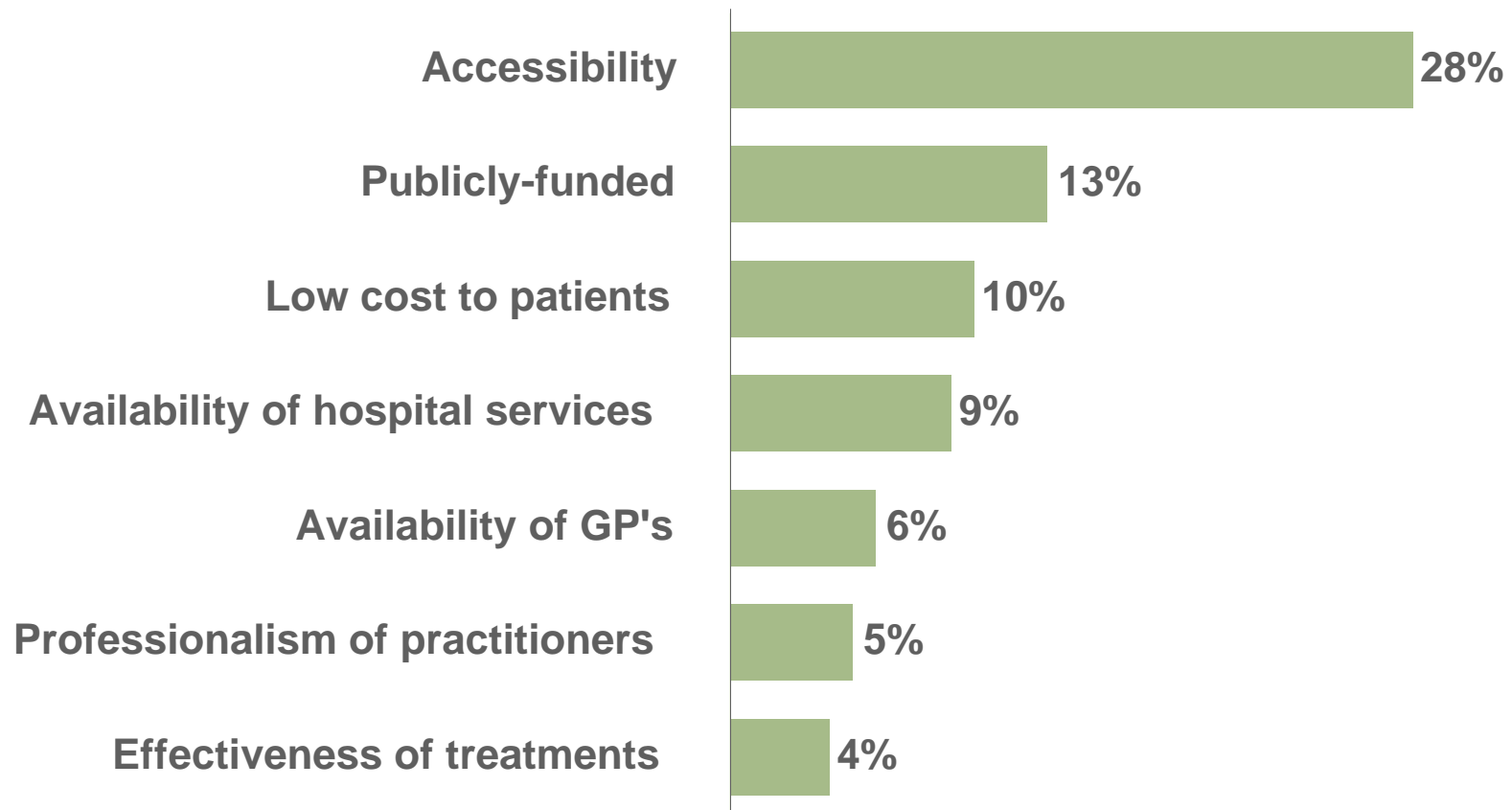
Level Of Agreement: Canada Is One Of The Best Countries To Live In Due To Health Care System



Q. Do you agree or disagree with the following statement? One of the things that makes Canada one of the best countries in the world to live is the quality and availability of health care.

Base: Total respondents

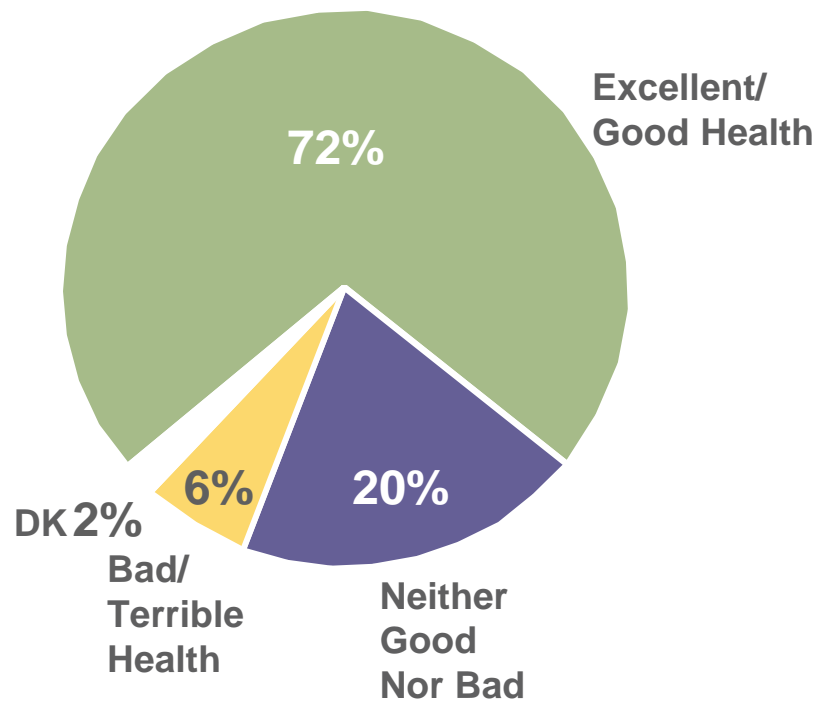
Most Valued Aspect of Canada's Health Care System



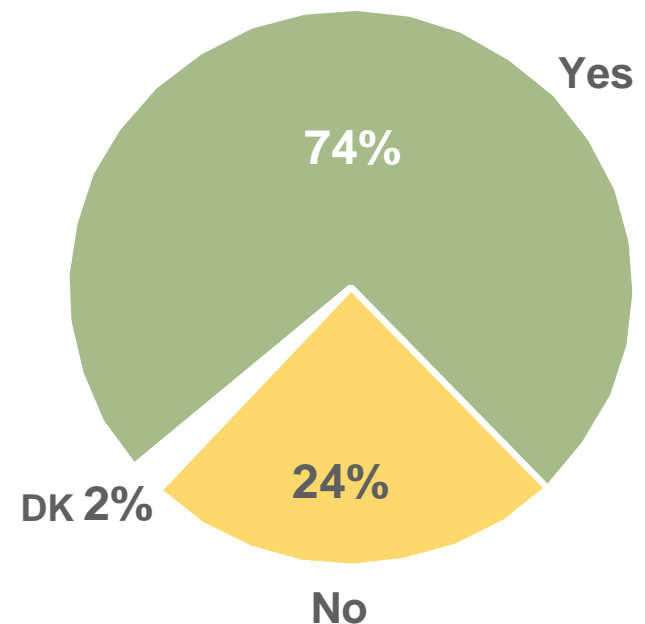
Q. What aspect of Canada's health care system do you value most?
Base: Total respondents (n=1404)

Three-Quarters of Canadians Report Overall Good Health and Regular Health Care Visits

*Self-Assessed
Personal Health
Status*



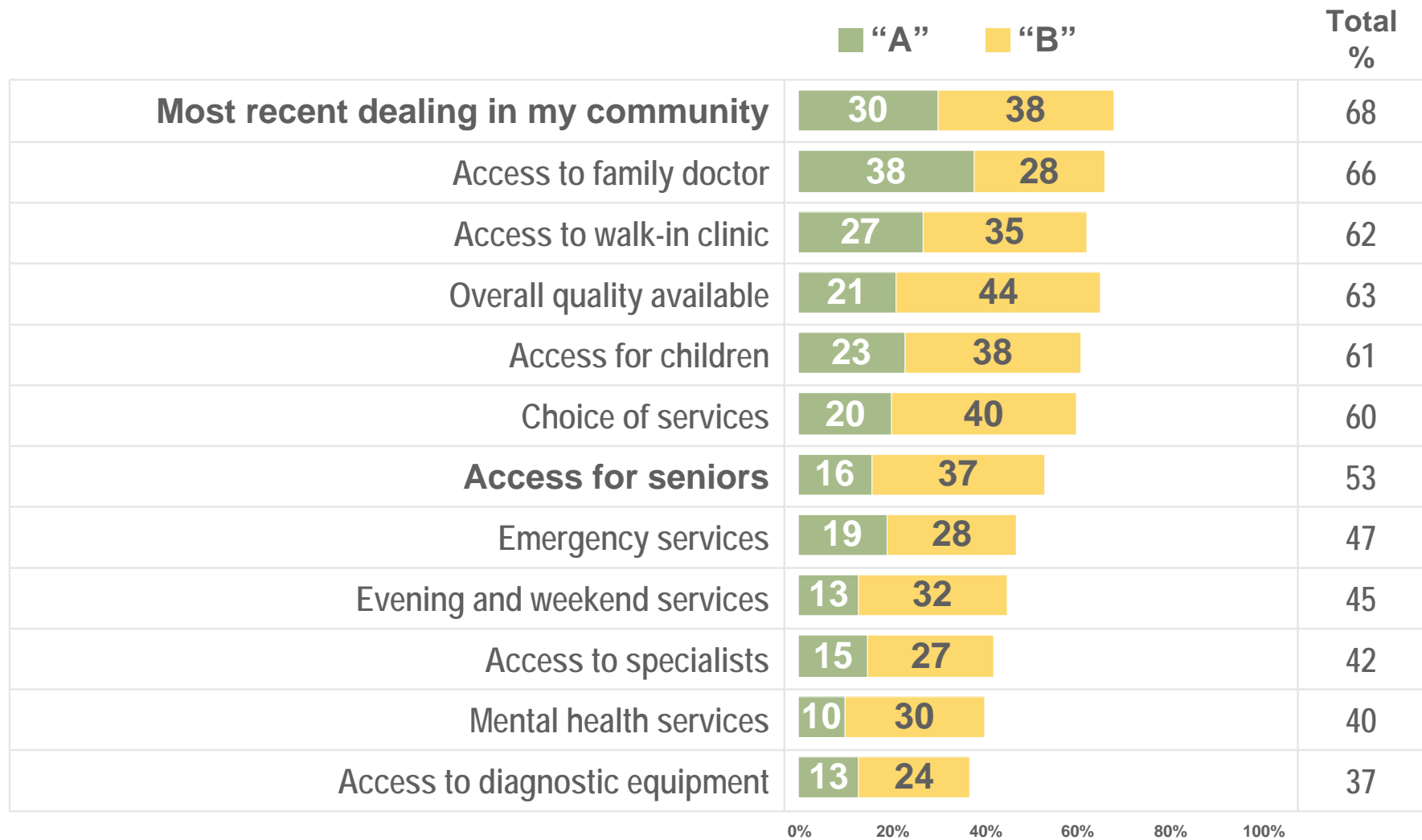
*Personal Use of Health
Care Services Within the
Past Year*



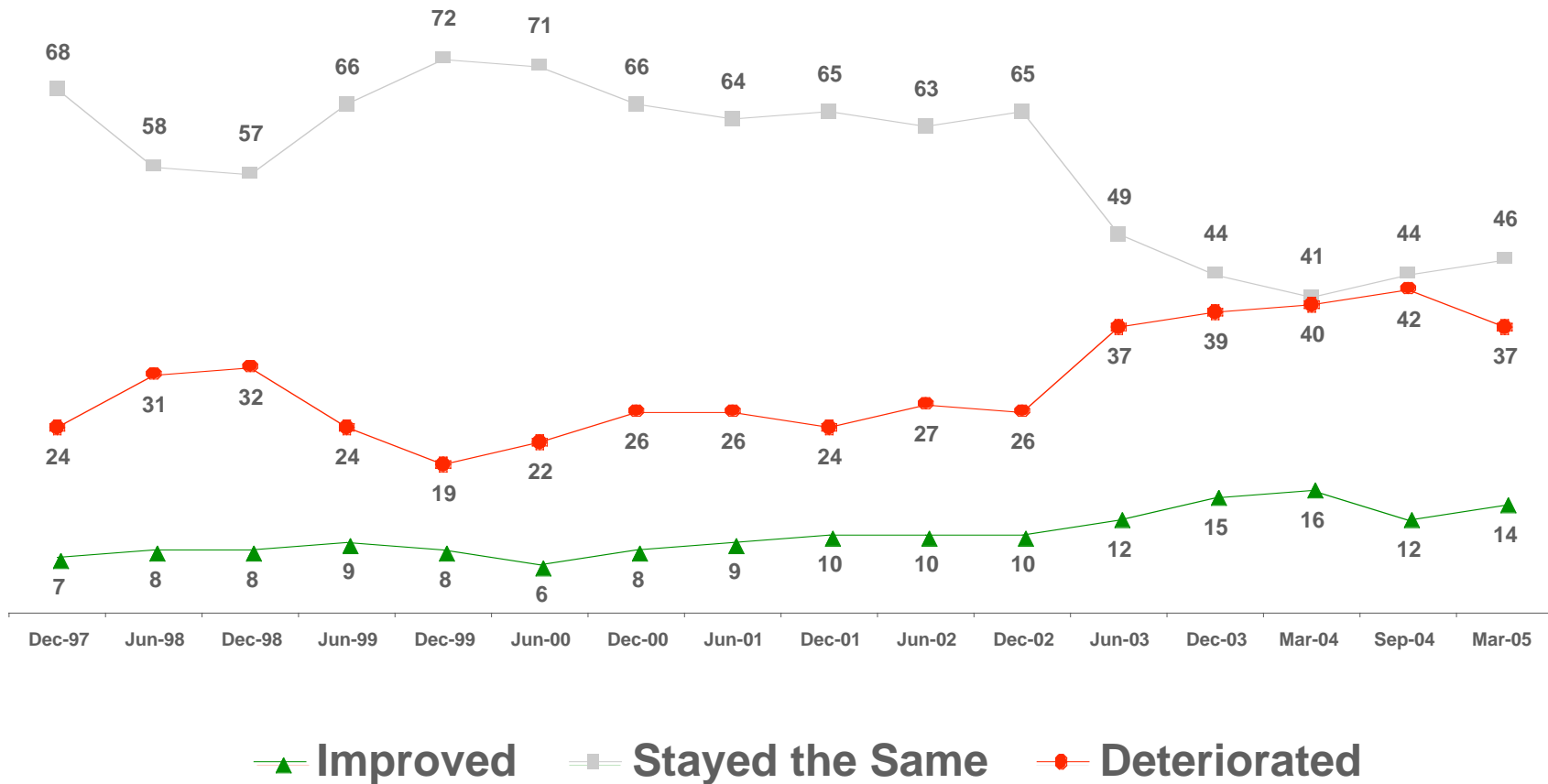
Ratings Of The Quality Of The Level Of Health Care Personally Received In The Last Year

GenderAge	%Male	%Female		%	(n=490)%25-34		%35-44	%45-54	%55-64
									○
				○	○	○	○		□

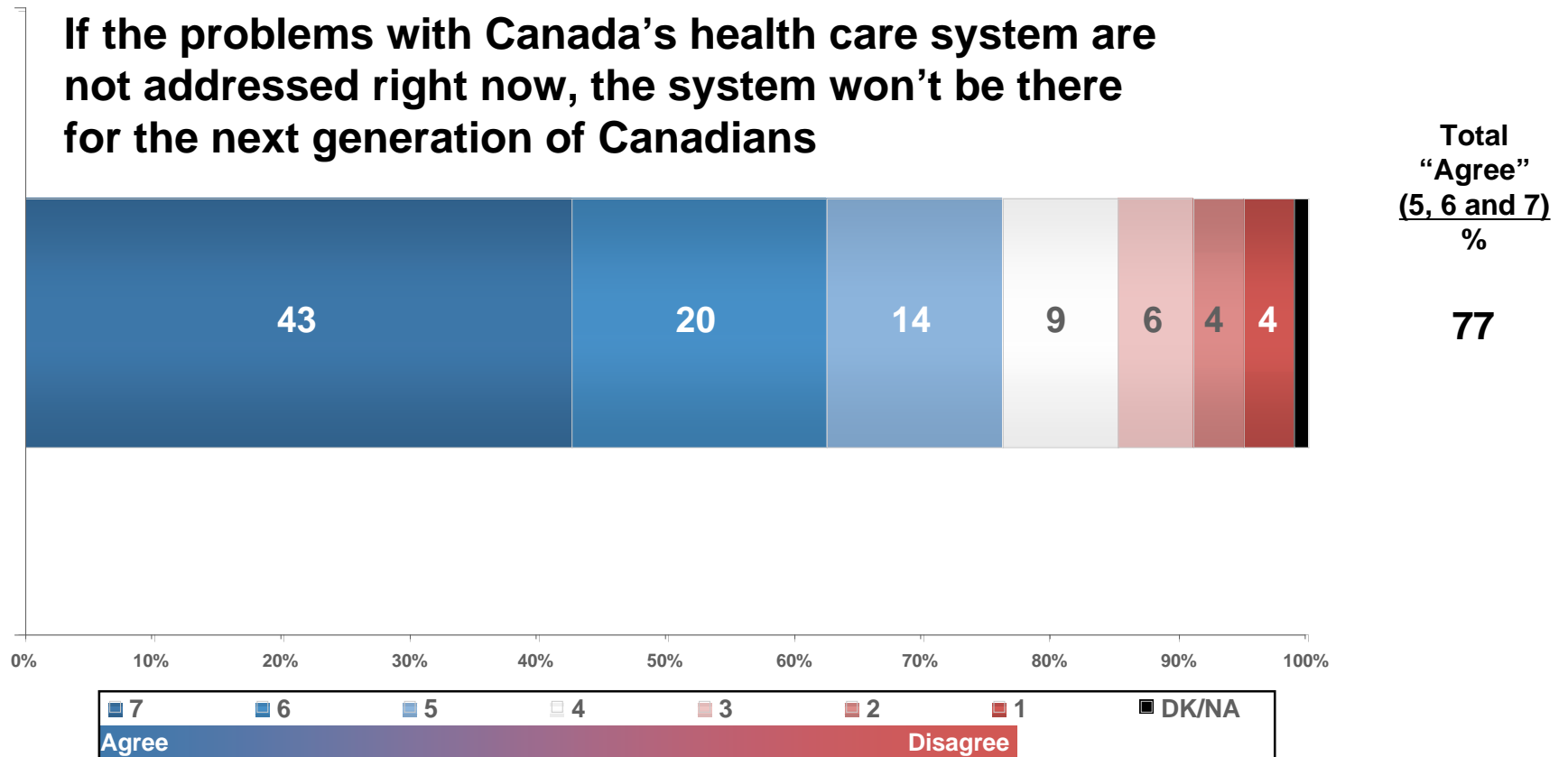
Grading The Health Care System - % of Canadians Offering an “A” or “B” Rating For...



Tracking the Perceived Quality of Health Care Over Time – Has The Slide Been Arrested?



Perceived Urgency of Reform



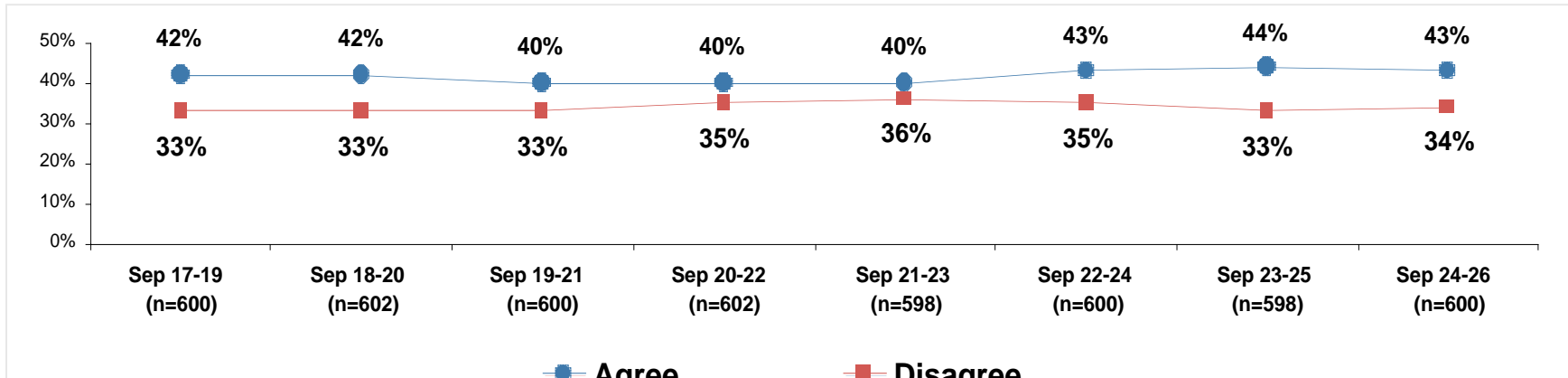
Q.4a-e Using a scale of 1 to 7, where 7 means you strongly agree, 1 means you strongly disagree and the mid-point 4 means you neither agree nor disagree, please tell me if you agree or disagree with the following statements.

Base: Total respondents (n=2,446)*

* Weighted sample

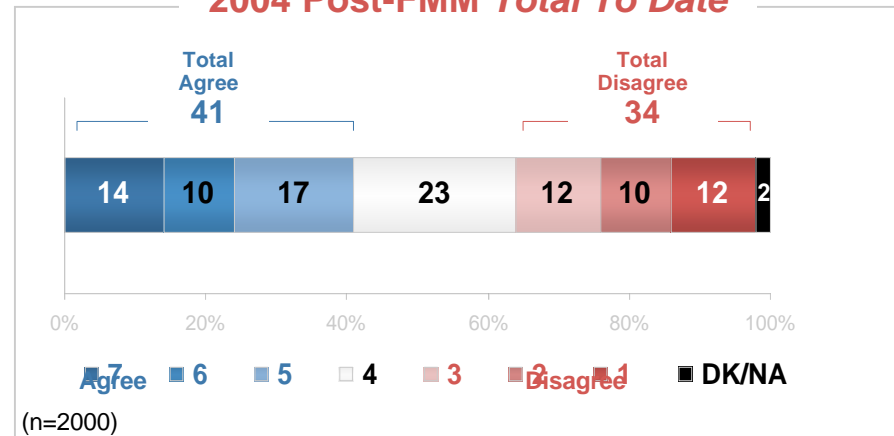
Confidence in Governments to Solve Health Care Problems

2004 Post-FMM 3-Day Rolling Results



Q.
I am not confident that the federal, provincial and territorial governments can solve the problems with Canada's health care system.

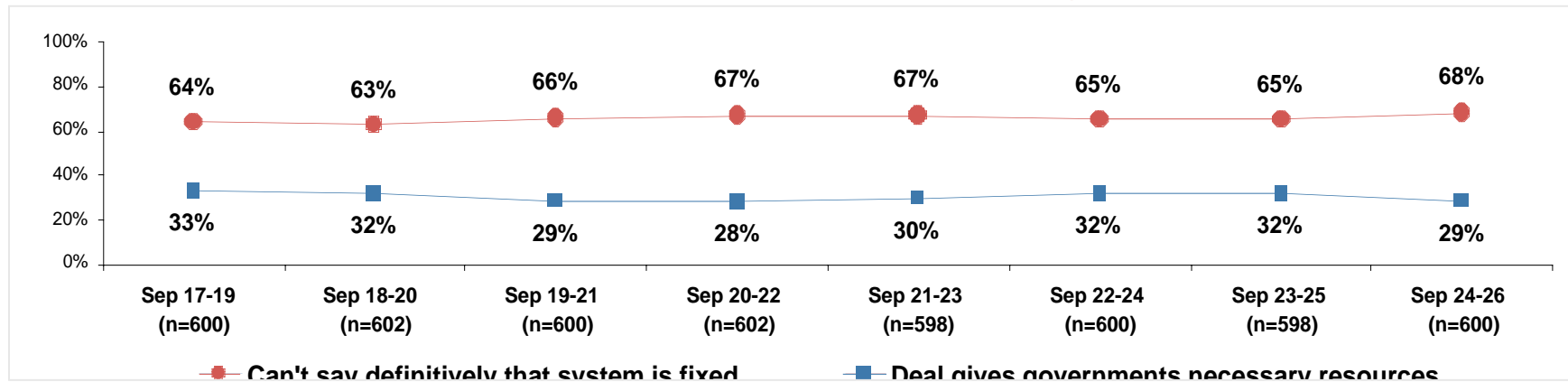
2004 Post-FMM Total To Date



Base: Total respondents (weighted sample)
 Source: Health Canada Post-Agreement Survey

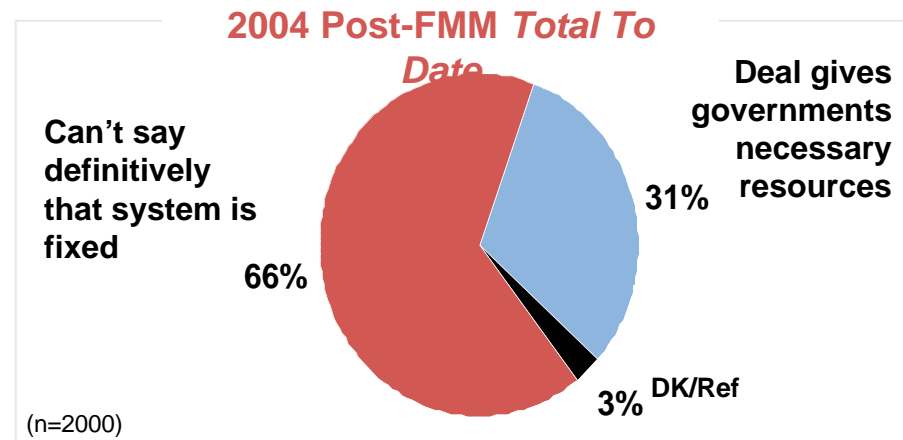
Necessity for Further Negotiations on Health Care

2004 Post-FMM 3-Day Rolling Results

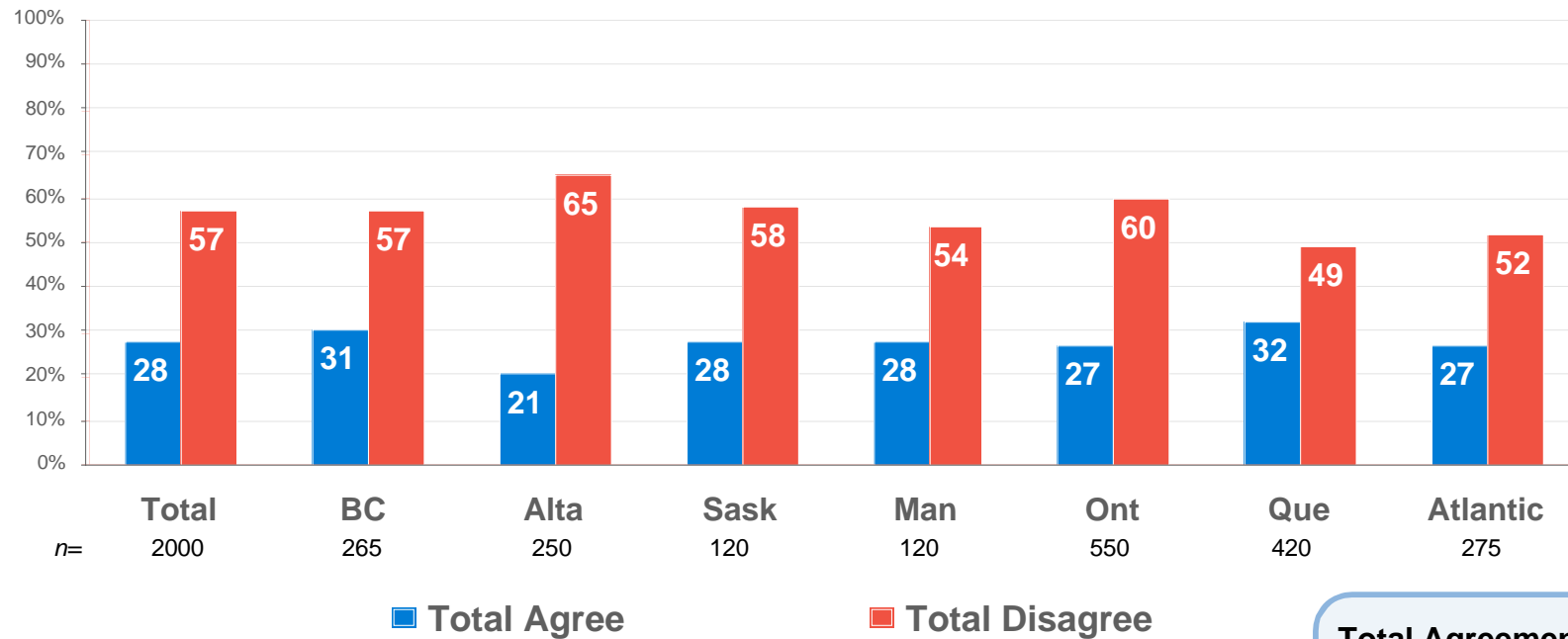


Q.21B

Some people say that we have had enough meetings on health care, and that this deal gives governments the necessary resources to get on with implementing health care reform. Other people say that managing the health care system will continue to require regular meetings because the needs of the system are constantly changing and it is impossible to say definitely that the system is fixed. Which point of view is closest to your own?



Canadians Should Lower Expectations of Health Care System



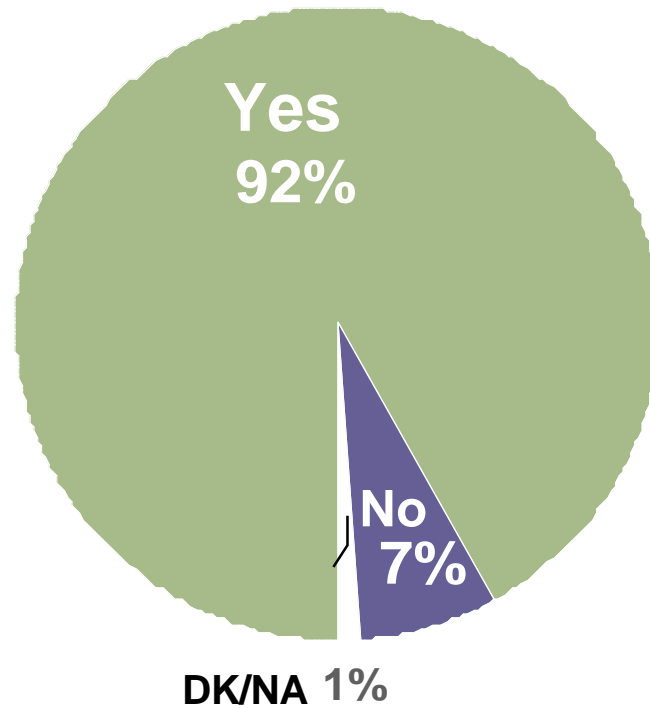
Q.
Canadians should lower their expectations about what the health care system of the future can deliver.

Total Agreement by age and gender	
18-29	21%
30-39	24%
40-49	25%
50-59	29%
60+	36%
Male	31%
Female	25%

Base: Total respondents (weighted sample)
 Source: Health Canada Post-Agreement Survey

Belief That Health Care Can be Improved Given the Right Plan and Resources

(asked of those rating health care as “poor/very poor”)



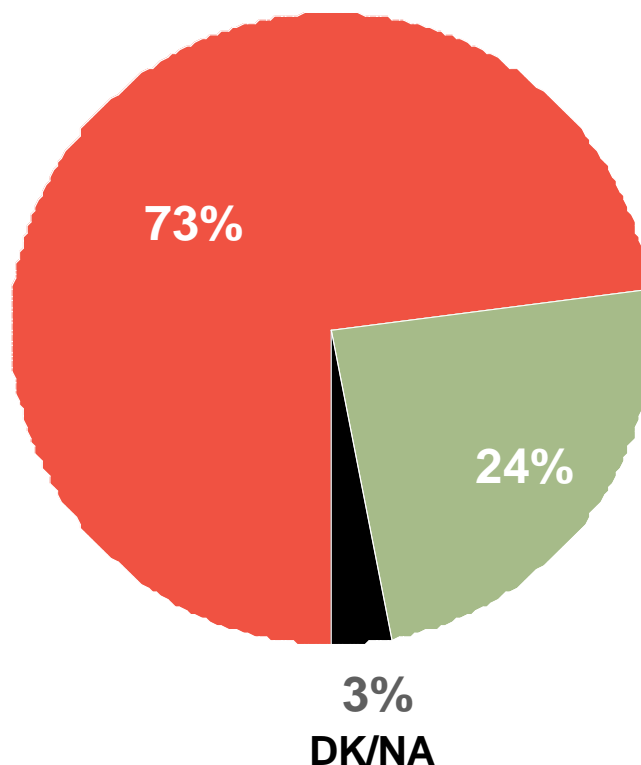
Q.3 Do you think that, with the right plan and enough resources, it is possible to improve the quality of health care?

Base: Those respondents who answered “poor” or “very poor” in Q.2 (n=536)*

* Weighted sample

The Principle of Universality (in the Context of Funding Pressures)

**Universality
is important
regardless of
cost**



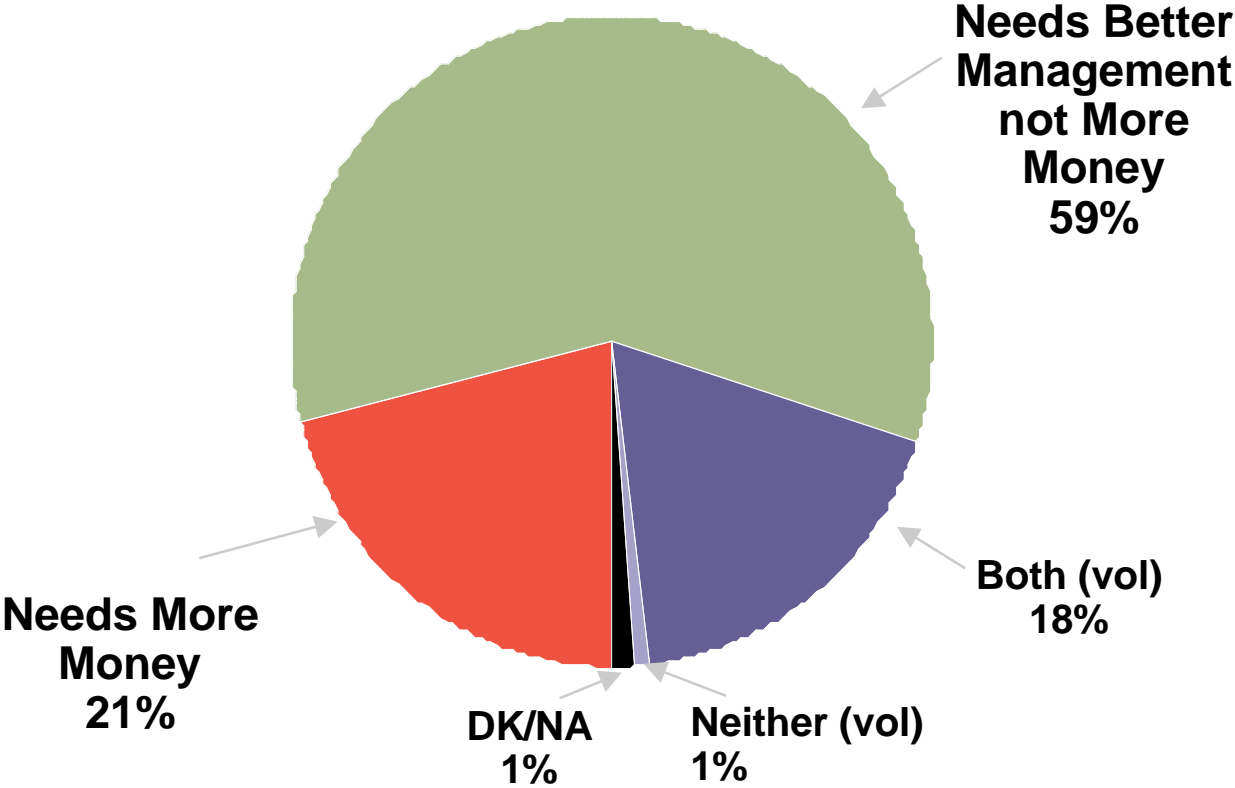
**Ensuring universality
is simply too costly
and we can no longer
afford to expect so
much from system**

Q.5 Some people say that ensuring that health care is universally available to everyone, regardless of their ability to pay, is so important that we must do everything we can to protect these principles. Other people say that ensuring universal access, regardless of ability to pay, is simply too costly and we can no longer afford to expect so much from the health care system. Which point of view best reflects your own?

Base: Total respondents (n=2,446)*

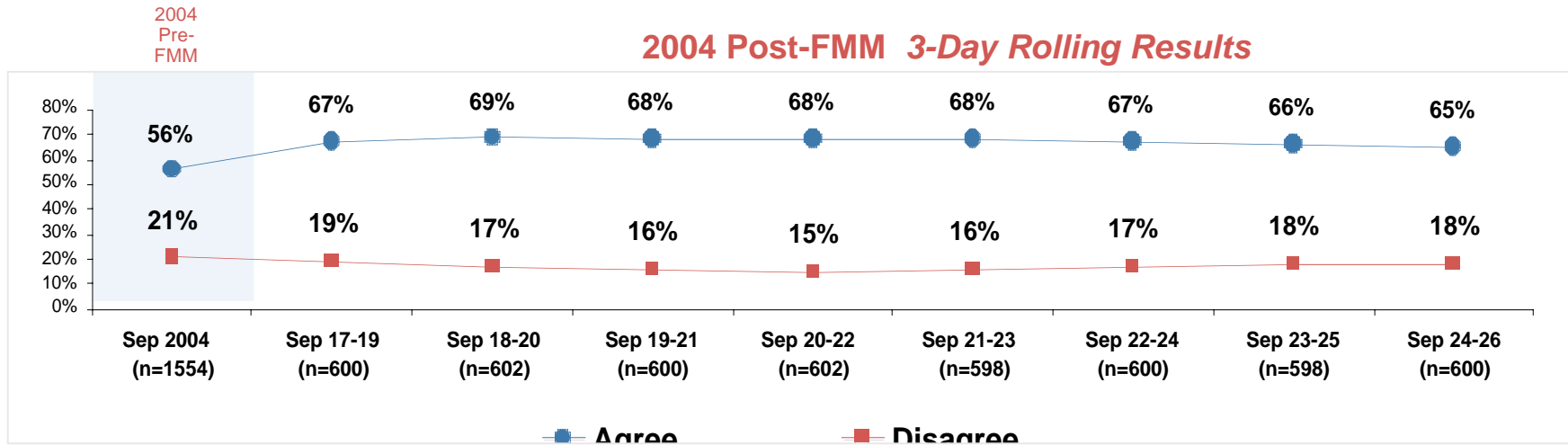
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The Fundamental Issue: More Dollars or Improved Management?

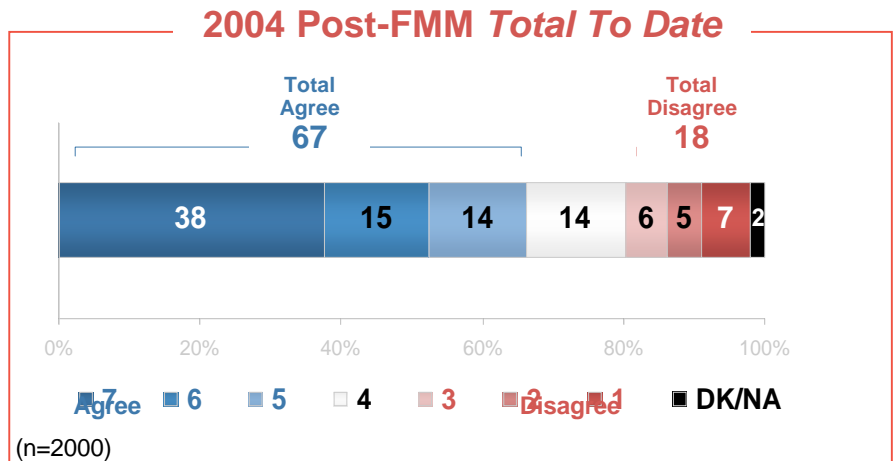


Q.8 Some people have said that the basic problem is that the health care system needs more money to be spent on improving it. Other people have said that there is already enough money being spent and that the system simply needs to be better managed. Thinking of these two points of view, which one best reflects your own?
Base: Total respondents (n=1404)

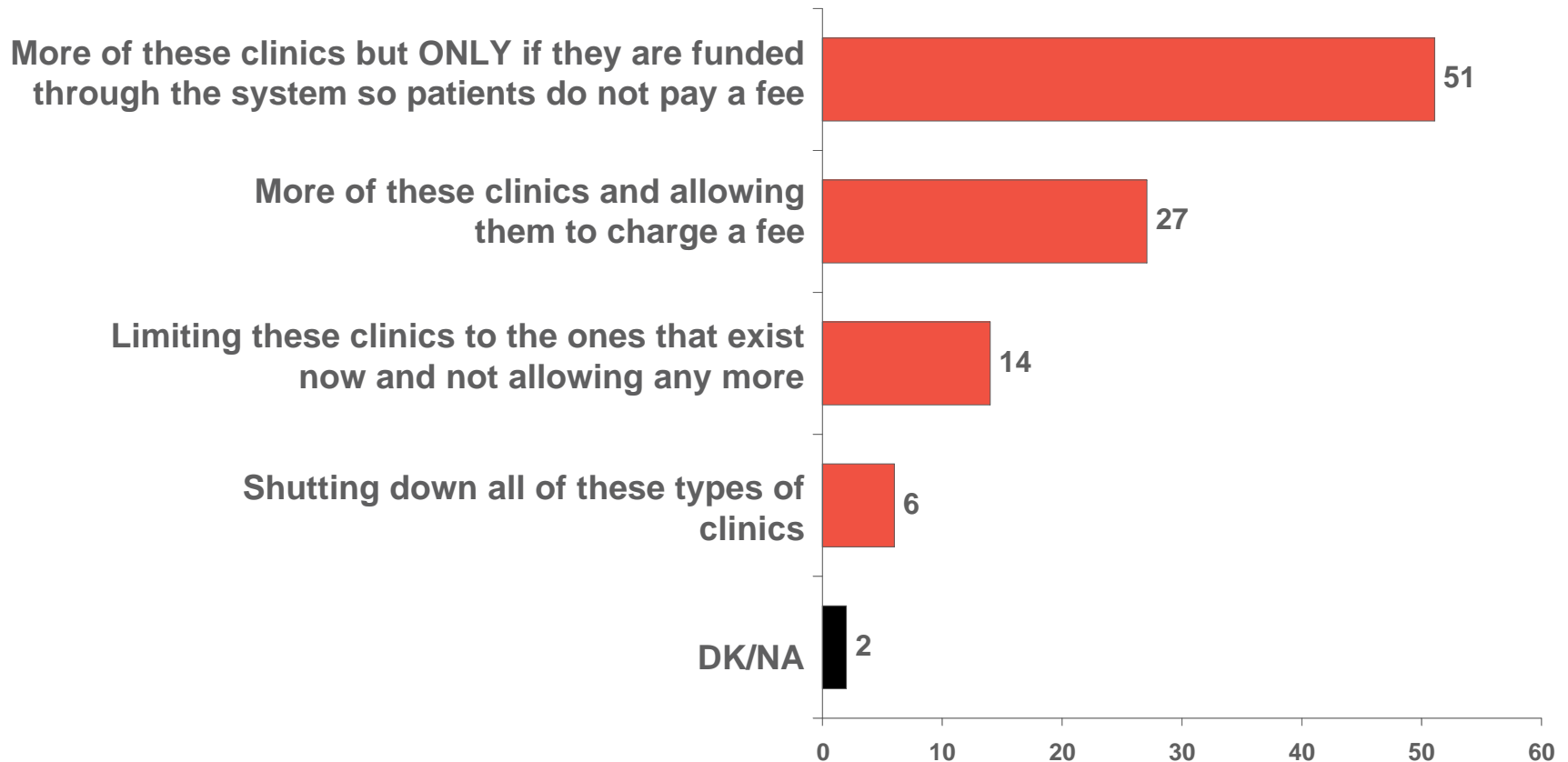
Perceived Waste and Mismanagement of Existing Funds



Q.
The biggest problem with the health care system is that there is too much waste and mismanagement of the money that is already there.



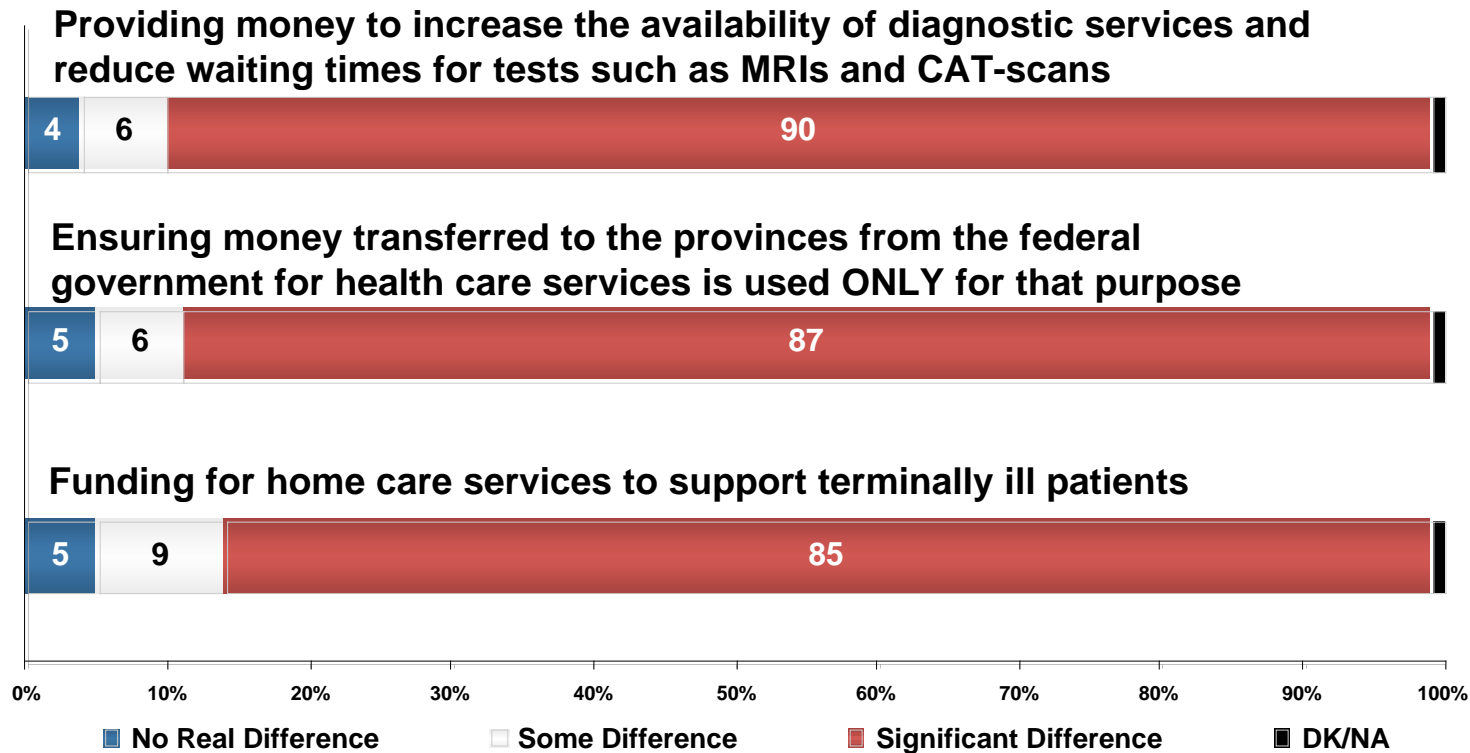
Attitudes Towards Private Sector Clinics



Q.13 Right now, in some provinces, there are health clinics offering diagnostic and surgical services through the private sector. If you had your way, would you like to see

...
Base: Total respondents (n=2,446)*
* Weighted sample

Extent to Which Proposed Reforms Would Make a Difference in Improving Health Care



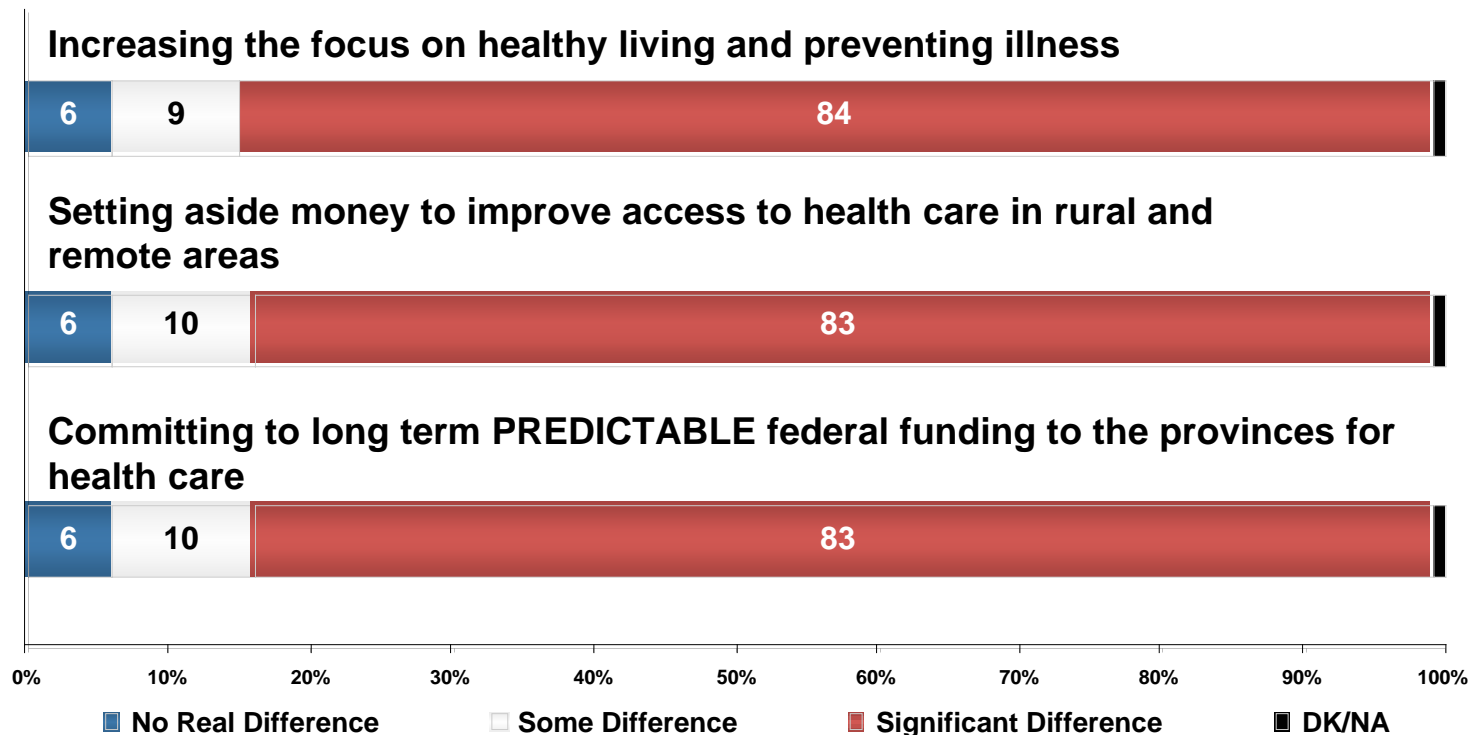
Q.8a-l The Royal Commission on The Future of Health Care in Canada has come forward with a series of recommendations to reform health care. I'd like you to tell me the extent to which you think each of these proposed reforms, if implemented, would make a difference to improving health care. Please use a scale of 1 to 7, where 7 means it will make a significant difference, 1 means it will make no difference at all and the mid-point 4 means it will make some difference.

Base: Total respondents (n=2,446)*

* Weighted sample

Note: "No Real Difference" is the sum of 1, 2 and 3 responses; "Some Difference" is '4' responses; "Significant Difference" is the sum of 5, 6, and 7 responses.

Extent to Which Proposed Reforms Would Make a Difference in Improving Health Care (cont'd)



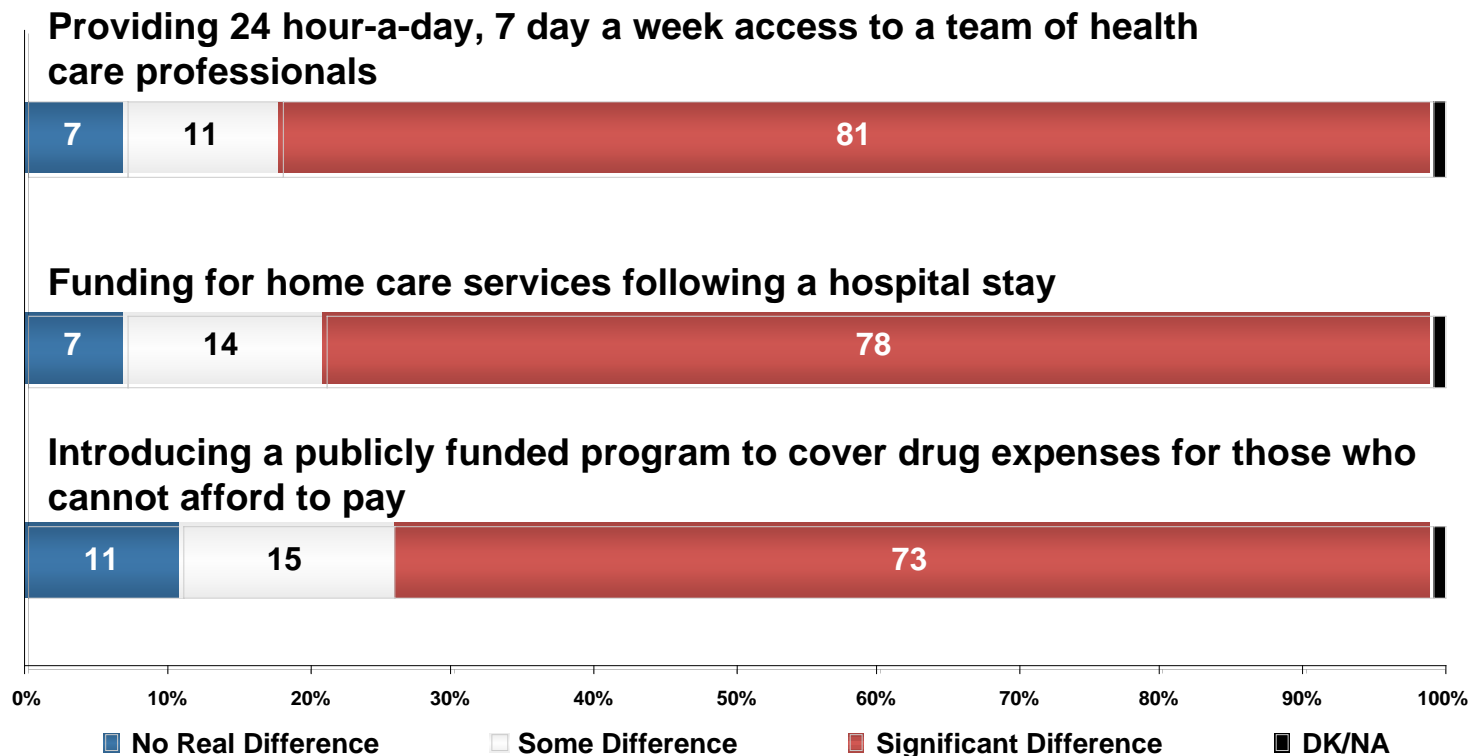
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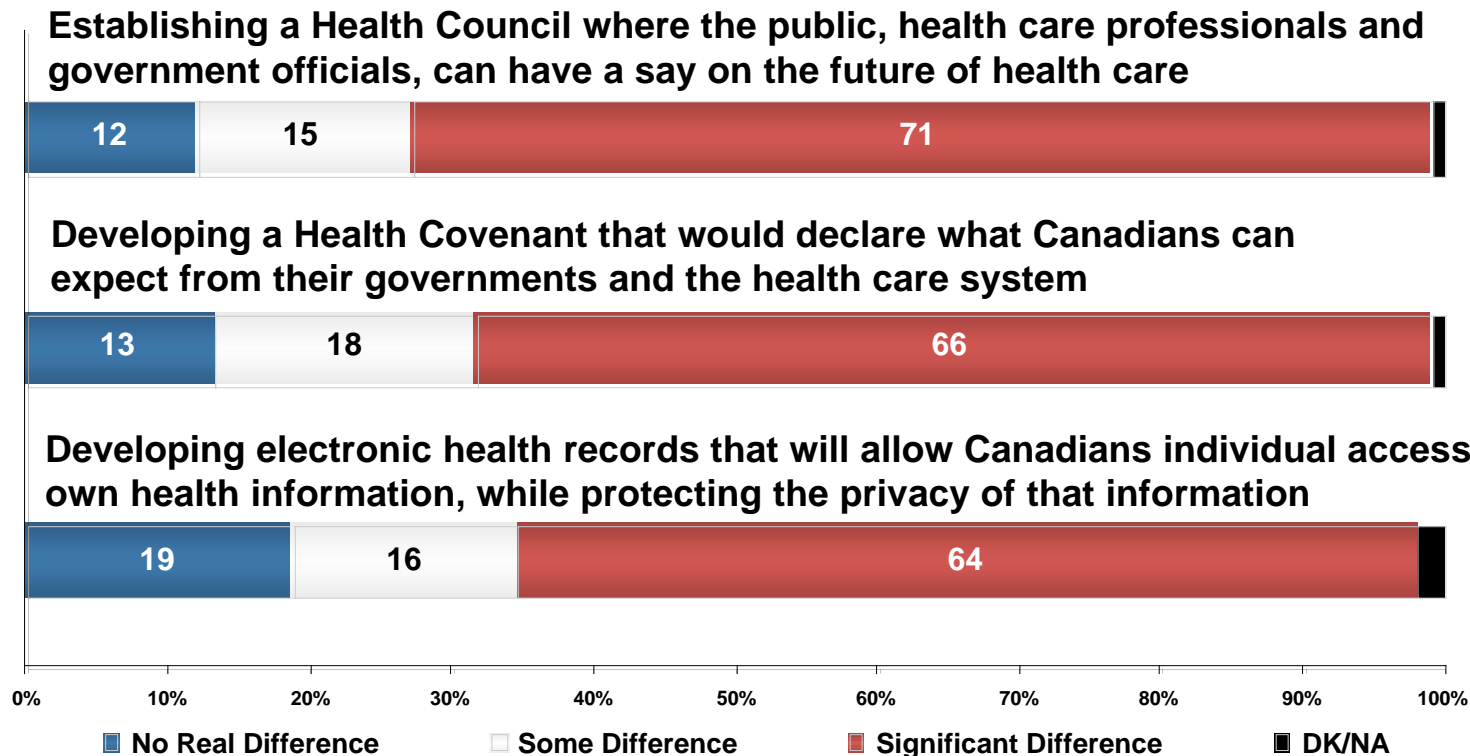
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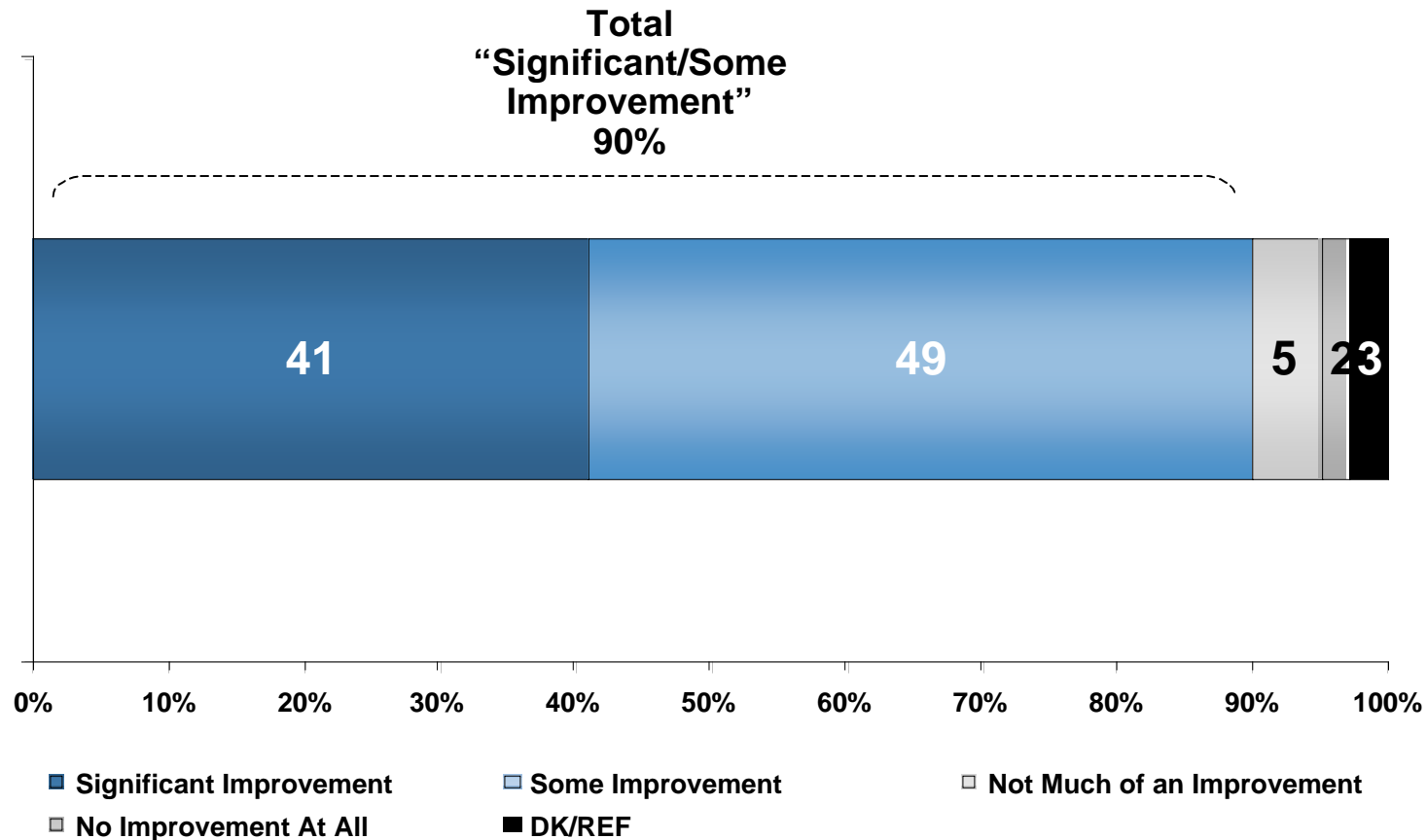
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Expected Improvement to Health Care System With the Implementation of Most/All Recommendations

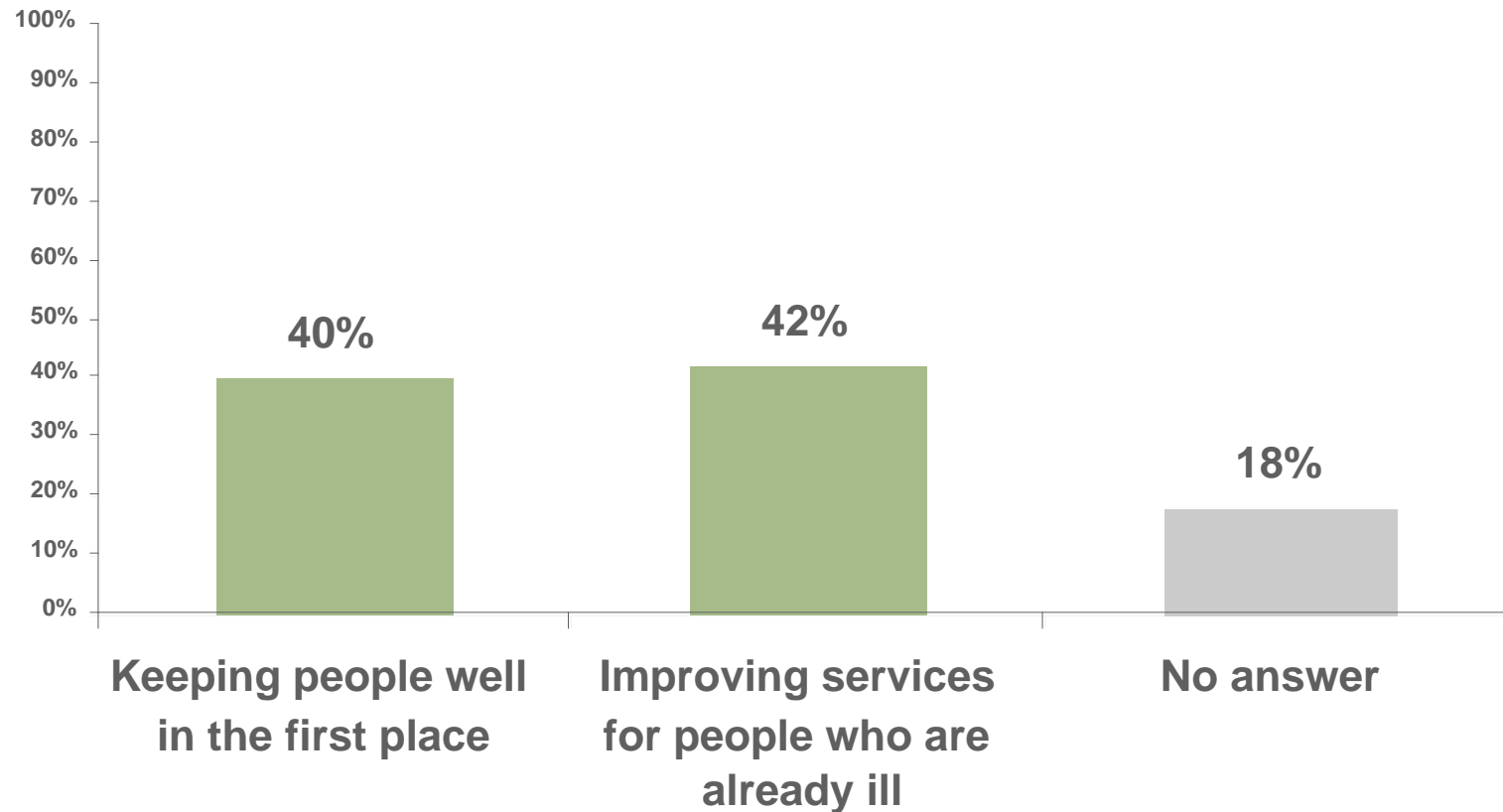


Q.9 If most or all of the Royal Commission's recommendations were implemented, how much of an improvement do you think they would make to the health care system? Do you think they would make a significant improvement, some, not much or no improvement at all?

Base: Total respondents (n=2,446)*

* Weighted sample

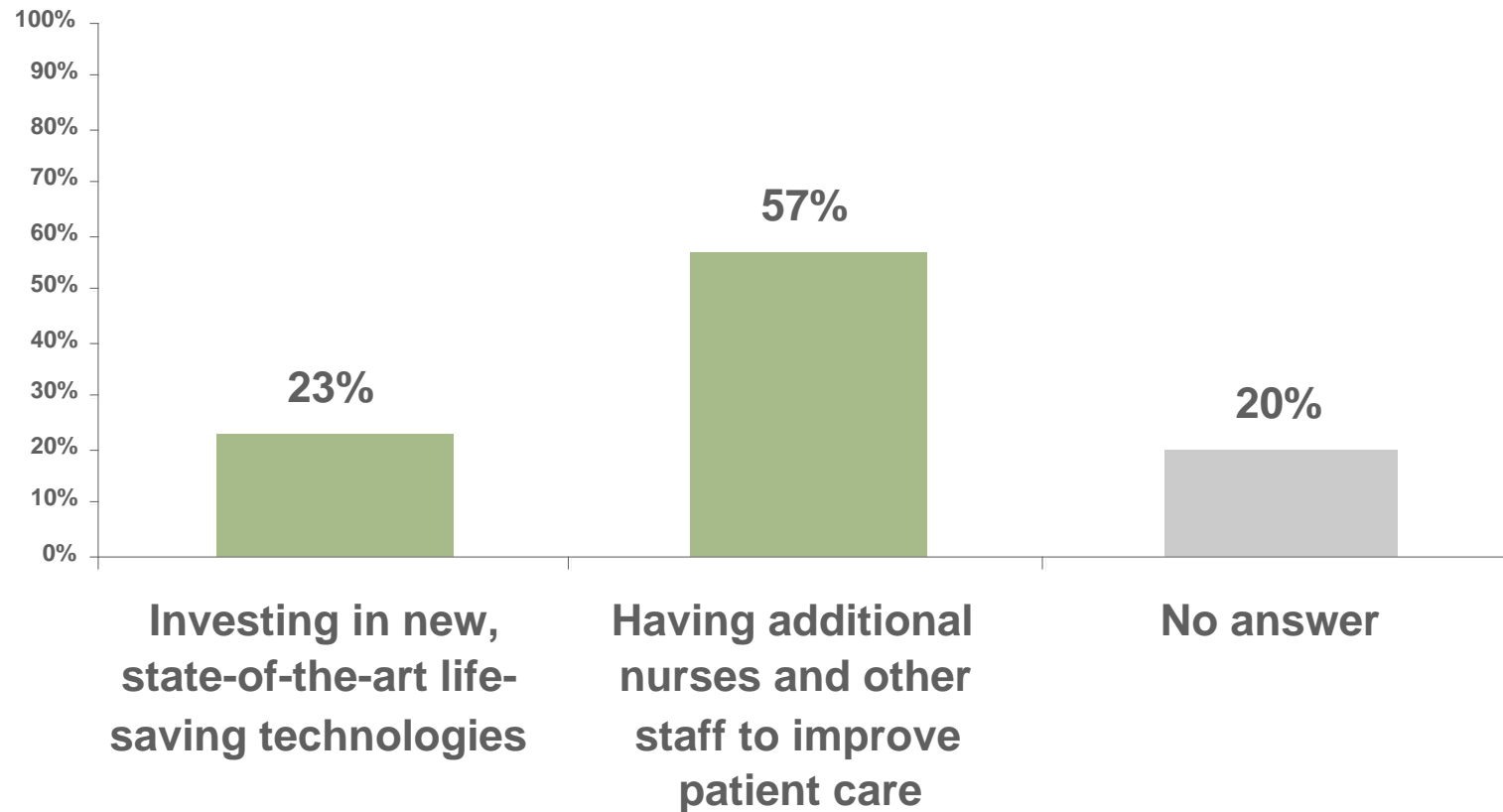
Importance Of Health Care Choices



Q. In the next several questions you will be presented with some choices facing the health care system today. For each set of choices, please tell us which one is most important to you by circling your choice.

Base: Total respondents

Importance Of Health Care Choices



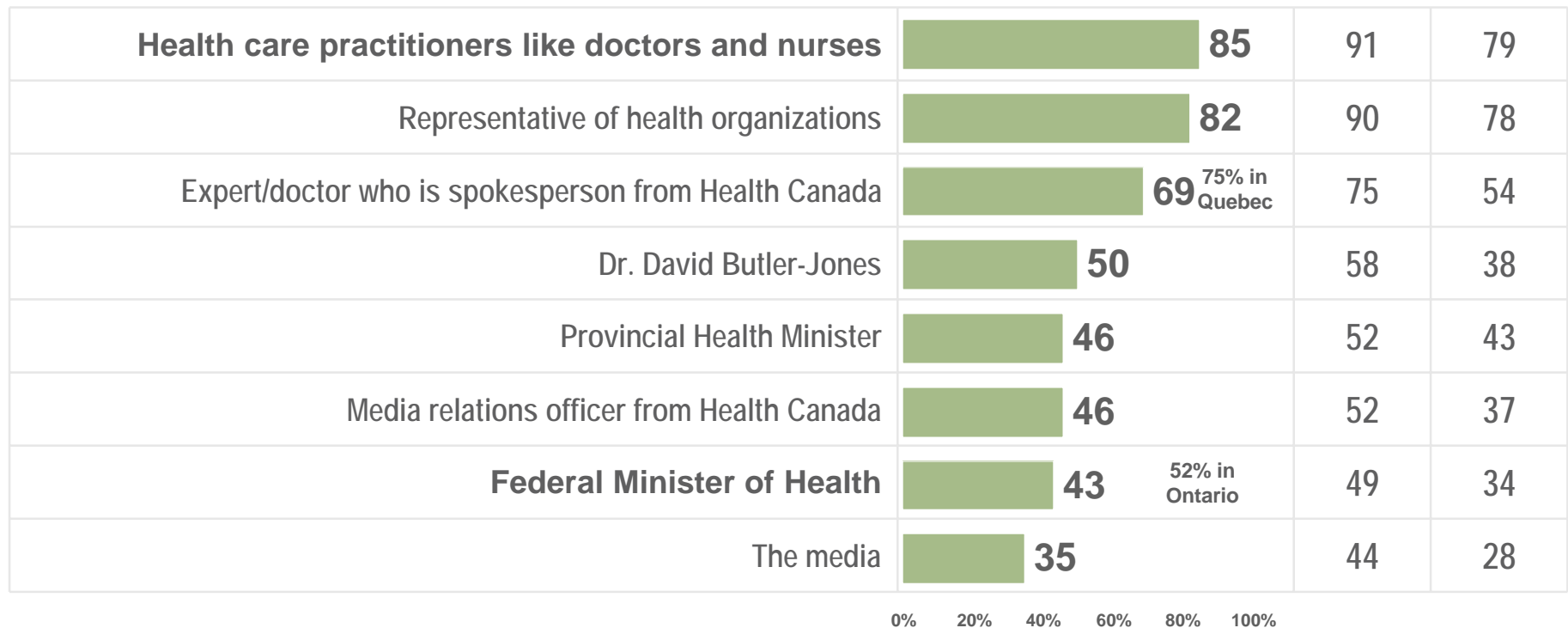
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Base: Total respondents

In Terms of Credibility of Spokesperson, Front-Line Health Care Practitioners Rate the Highest

Generally, credibility ratings are:

Higher in Atlantic *Lower in Alberta*



Implications

- There has been a fundamental shift in the public opinion agenda over the last six years
 - ✓ “Defining the future” should begin now
 - ✓ Know who and know how to mobilize your natural constituency in aid of your goals

Implications

- A new generation of disaffected is coming through the system
 - ✓ "Crisis" will get worse before it gets better
 - ✓ Get ahead of the curve now

Implications

- Health care forms a central part of the Canadian identity
 - ✓ Quality and access are not negotiable or subject to trade-offs

Implications

- There is a growing consensus that health care is a problem. There is no consensus however as to what is the solution
 - ✓ The population has eliminated the status quo as an option
 - ✓ Will entertain alternatives
 - Must be positioned as a means of maintaining quality and access rather than an end of cost reduction or fiscal sustainability

Implications

- Consumers believe funding of the system is a major priority
- Do not believe that increased funding, unto itself, will solve problems
 - ✓ Recognizing and acknowledging inefficiencies part of the key to public credibility

Implications

- Many perceived problems in the system remain largely in the abstract
 - ✓ Patient experience is decidedly better than perceptions
- Exception is in “catastrophic care”, where system is seen to lack the resources, flexibility or discretion to deal with emergency needs
- Must galvanize consensus as to what the real problems in the system are.

Implications

- The population is prepared to accept that they are part of the problem
 - ✓ Consumer education and delineating and defining “How to” use different aspects of the system key to public compliance

Implications

- Politicians are attempting to force consensus before taking major initiatives

Implications

- Private sector partnerships will be tolerated, but only if they are seen to be part of and operating under the rules of the public system
 - ✓ Tap into business efficiencies of private sector but frame their involvement under the umbrella of public trust and regulation

Implications

- A high tech/high touch posture is most advantageous to the public acceptance
 - ✓ Technological solution geared the efficiencies -- means
 - ✓ Consumer service including health promotion and prevention as the driving focus of change -- ends