

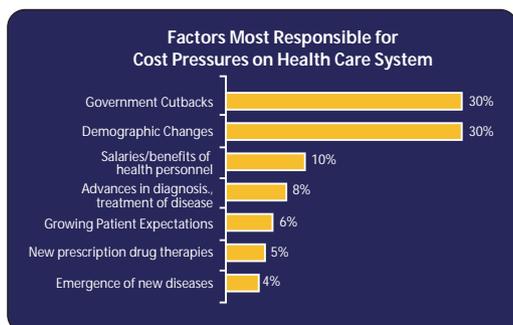
Survey

Public Sentiment Driving Health Reform Tipping in New Directions

The Canadian public has come to the conclusion that now is the time to make tough choices to secure a sustainable, relevant, responsive healthcare system for the future. While the public does not feel it has all the answers, or all the information to provide informed directions, it does feel competent to say what is wrong with the system, what values should drive repairs and what new directions should be explored for the future.

What's Driving Cost Pressures?

Nearly every Canadian (93%) has an opinion regarding what is most responsible for the cost pressures on the healthcare system. Figure 1 illustrates that Canadians are equally likely to cite demographic changes, like the aging cohort of baby boomers, and government cutbacks (30% each), as most responsible for cost pressures on the healthcare system. Fewer Canadians see the salaries of healthcare workers (10%), advances in diagnosis and treatment (8%), or growing patient expectations (6%) as most responsible for the cost pressures currently facing the system.

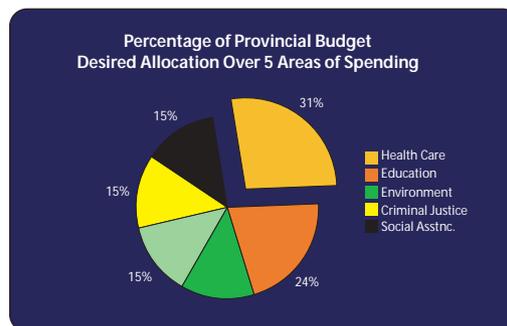


Another 5% say new prescription medicine therapies are to blame for cost pressures on the healthcare

system, and 4% point to the emergence of new diseases. Residents of Atlantic Canada are the most likely to cite government cutbacks (37%), while Quebecers are most likely to point to demographic changes (37%).

Healthcare the Top Priority (but Not the Only Priority)

Canadians also indicate that they want their provincial governments to make healthcare their top priority among areas of social spending. On average, Canadians want their provincial governments to devote more money to healthcare (31% of the budget) than to education (24%), the environment (15%), criminal justice (15%) or social assistance (15%). The strongest advocates of healthcare spending are those over age 55, who say that an average of 35% of provincial budgets should be spent on healthcare. Response patterns are remarkably similar across various regions.

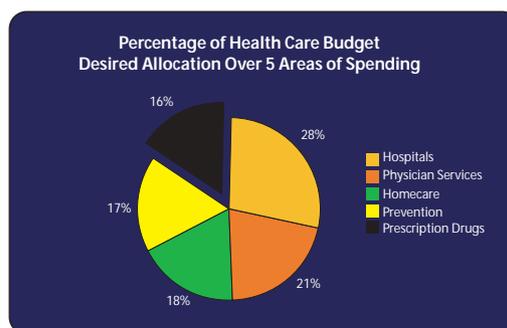


Given the opportunity to develop a healthcare budget on their own, Canadians would devote considerably more dollars

to the suite of services which encompasses home care, prevention and prescription medicines than are currently being spent.

Canadians would tend to triple the portion of the budget allocated to home care, increasing from the current national average of 6% to 18%. The portion dedicated to prevention would also increase substantially to 17%, up from a national average of 7%. Finally, prescription medicines would also receive a greater share of the healthcare budget, doubling from 8% to 16%.

When informed about how much provincial governments

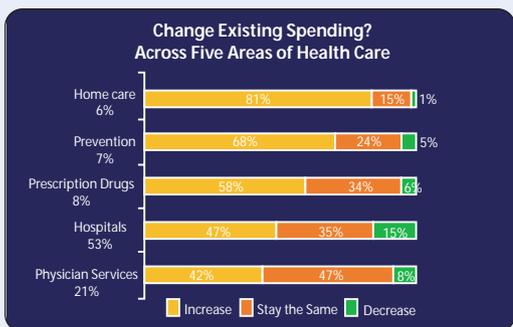


spend on the various sectors of healthcare (CIHI, *Preliminary Provincial and Territorial Government Healthcare*

Expenditure Estimates, 1975/76 to 2001/02) the majority of Canadians would like to see more spending on home care (81%), prevention (68%), and prescription medicines (58%), the areas that currently receive the lowest amount of provincial funds. While fewer would like to see increased spending on hospitals (47%) and physician services (42%), there is little appetite for decreased spending in any of these areas.

Regionally, residents across Canada are consistently in favour of increasing spending on home care. However, more variation in opinion is evident in other areas. For example, residents of Québec are more agreed on the need to increase spending on hospitals (60%) in contrast to those in BC, who are the least likely to think so (36%). Also, residents of Alberta (81%) are most in favour of increasing spending on prevention, in sharp contrast to other western residents (63%).

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It is important to note that very few Canadians want funding for any of these elements actually reduced. Instead, a majority of Canadians appear to believe that greater priority should be attached to providing accessibility to home care, preventative care and prescription medicines than currently indicated. And increasingly, Canadians are willing to pay ... through their taxes. More on that next quarter.

Don Guy is Senior Vice President with POLLARA Inc.

GlaxoSmithKline commissioned POLLARA to conduct the Pharmaceuticals in Canadian Healthcare survey in January 2002 involving telephone interviews with 2,223 randomly selected adults from across Canada. Survey respondents were equally divided between men and women, and ranged in age from 19 to 94.

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Call for submissions to win the second annual Ted Freedman Award for Innovation in Education in health, health services and health management

This annual national award is presented by the Educational Services Group of the Ontario Hospital Association and the editors of *Hospital Quarterly*. It is made entirely possible by a grant from Philips Medical Systems. The award recognizes those individuals or organizations who inspire, advocate and enable education in healthcare.

Submission guidelines: This is a wide-open national competition. Any one or any group can submit. Adjudicators will look particularly at the effectiveness of the innovation as an agent of change. Effective use of technology counts. Your response to these touchstones is critical. Also provide us with a name, title, contact information, organization, objectives, and outcome. Supporting links, charts, graphs or other visuals can be submitted. Electronic submissions only. Please keep it brief. There are no other guidelines.

Submit your material to Anton Hart at ahart@longwoods.com.
 Deadline October 2, 2002.

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