



NIAGARA HEALTH SYSTEM
SYSTÈME DE SANTÉ DE NIAGARA
Working within an integrated system for a healthier Niagara.

Niagara Health System: 2012 Public Opinion Survey

POLLARA

Final Research Report

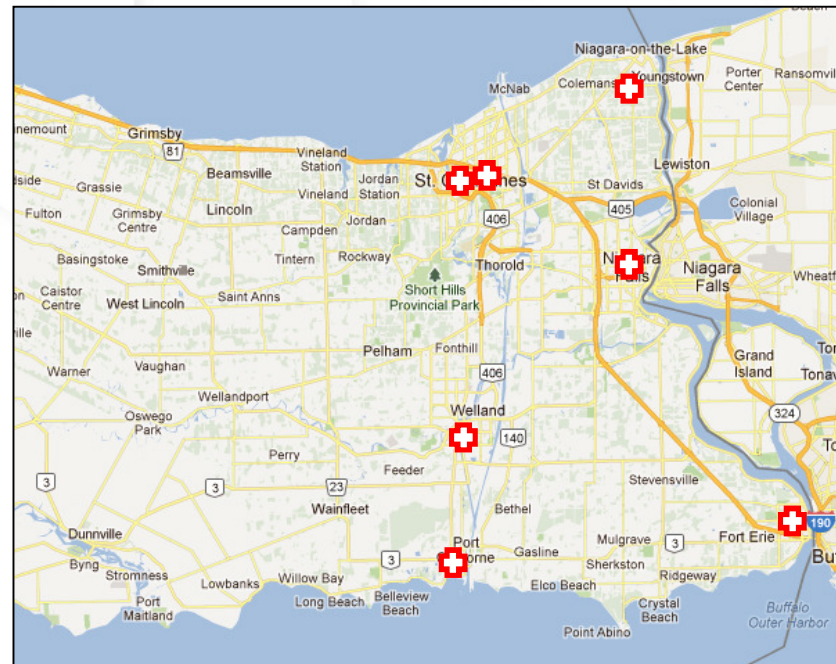
June 2012

Contents

Methodology	Slide 3
Key Findings & Recommendations	Slide 5
Part 1: Hospital Site Usage	Slide 8
Part 2: Impression Ratings	Slide 12
Part 3: Traveling to Local Hospital	Slide 20
Part 4: Attitudes Towards Hospital Care Delivery	Slide 25
Part 5: Community Response to Restructuring Proposal	Slide 28

Methodology

- From May 25 to June 5, 2012, Pollara conducted a telephone survey among a randomly selected, representative sample of at least 75 adult residents in each of the 12 communities comprising the Niagara Health System catchment area. For the purpose of this research, the Niagara Health System catchment area was defined as the area including the communities of Fort Erie, Grimsby, Lincoln, Niagara-on-the-Lake, Niagara Falls, Pelham, Port Colborne, St. Catharines, Thorold, Wainfleet, Welland and West Lincoln as depicted in this map:



✚ - Existing NHS site

Methodology

- The overall sample size for all 12 communities combined is n=1000. The margin of error for the overall sample is +/- 3.1%, 19 times out of 20. The table below shows the distribution of completed surveys across the communities:

Community	Sample Size	Margin of Error (95% Confident Interval)
Fort Erie	83	+/- 10.7%
Grimsby	80	+/- 10.9%
Lincoln	77	+/- 11.1%
Niagara-on-the-Lake	79	+/- 11.0%
Niagara Falls	81	+/- 10.9%
Pelham	76	+/- 11.2%
Port Colborne	80	+/- 10.9%
St. Catharines	127	+/- 8.7%
Thorold	81	+/- 10.9%
Wainfleet	75	+/- 11.2%
Welland	80	+/- 11.0%
West Lincoln	81	+/- 10.9%

- The results have been statistically weighted according to Statistics Canada's 2011 Census data for age, gender and region to ensure a representative sample of the entire Niagara Health System catchment area. Discrepancies in or between totals are due to rounding.

Key Findings & Recommendations:

Usage and Impressions

- Although NHS sites comprised 68% of the hospitals used most often by patients, they are considered “My local community hospital” by 83% of Niagara Region residents.
- The overall impression rating for the NHS is 4.5 out of 10, which can be considered below average compared to other hospitals in Ontario. Impressions of key NHS attributes were also below average except for the quality of doctors and the nursing staff.
- The key attributes to focus on in order to improve the region’s overall impression of the NHS are “meeting the health care needs of your community,” “the quality of hospital administration within the NHS” and “the ease and speed of access to health care.” Improving perceptions of other attributes will not have as great an impact on overall impression as these.

Key Findings & Recommendations:

Appetite for Restructuring

- Currently, it takes residents 11:41 to drive to their local hospital on average, but they are prepared to drive as much as 19:35 to their local hospital. In fact, three quarters say they are willing to drive as much as 30 minutes further if they knew they could get the highest quality of care possible.
- Respondents overwhelmingly prefer a model of care based on a distribution of programs and services across sites focused more on quality over quantity.
- As such, residents of the Niagara Region support the principles behind the supervisor's proposed restructuring plan. Support for the plan itself, however, is a different story, as outlined on the next slide.

Key Findings & Recommendations:

Response to Restructuring Proposal

- Despite a stated preference for quality over quantity and a willingness to travel further to receive better care, most Niagara residents oppose the supervisor's recommendation to close the sites in Port Colborne, Fort Erie, Niagara Falls and Welland and replace them with two new facilities in South Niagara.
- The four directly-affected communities are among the most opposed. Meanwhile, Niagara-on-the-Lake and Pelham are the only communities in favour of the restructuring plan.
- The main reason for opposing the restructuring plan is location. Gaining public support will depend largely on a careful study and selection of optimal locations for the new sites that are well within the region's travel time threshold of 19:35.
- The proposed closures represent the primary hospital sites used by residents of Fort Erie, Niagara Falls, Pelham, Port Colborne and Welland, as well as secondary sites used by Niagara-on-the-Lake, St. Catharines and Thorold. Taking such broad regional considerations into account when selecting new sites will be an important challenge to overcome.
- If residents are to accept longer travel times, the "highest quality of care possible" part of the promise must be kept. In other words, trading off quantity must yield quality.

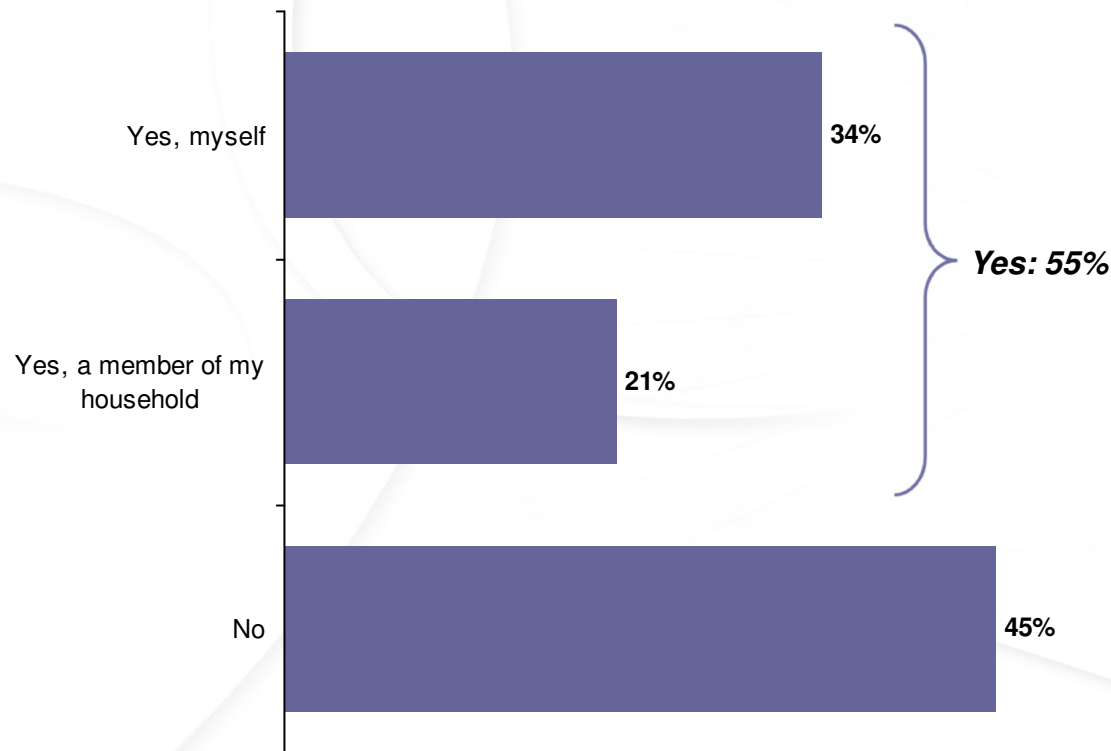
Part 1:
Hospital Site Usage

POLLARA 

Recent Visitation for Hospital Care:

Majority of Niagara households have required hospital care in past year

- More than half of all households in the Niagara Region (55%) have received health care treatment at a hospital within the past 12 months. There is not a great deal of variability in hospital visitation across the region, although households in Welland (65%) and Fort Erie (62%) are the most likely to have visited a hospital in the past year, whereas households in Pelham (40%), West Lincoln (42%) and Thorold (43%) are the least likely.



Question: "To the best of your knowledge, have you or anyone in your household received health care treatment at a hospital within the past 12 months?" [n=1000]

Local Hospital Usage:

NHS sites first choice for two-thirds of region's hospital care needs

- Combined, the seven NHS sites accounted for 68% of the hospitals gone to most often for health care services over the past 12 months by Niagara Region households. The top three – St. Catharines General, Niagara General, and Welland County General – account for a majority on their own (59%). NHS sites also comprised the majority of hospitals cited most often as being respondents' "local community hospital" (83% combined).

Hospital Gone to Most Often in Past 12 Months

- St. Catharines General Hospital Site (24%)
- Greater Niagara General Hospital Site (20%)
- Welland County General Hospital Site (15%)
- West Lincoln Memorial Hospital (10%)
- Douglas Memorial Hospital Site (4%)
- Hamilton General Hospital (3%)
- Port Colborne General Hospital Site (3%)
- Juravinski Cancer Centre (3%)
- Hotel Dieu Shaver Health & Rehab Centre (3%)

- All others: 2% or less
- Don't know (<1%)

Site Considered "My Local Hospital"

- St. Catharines General Hospital Site (34%)
- Greater Niagara General Hospital Site (24%)
- Welland County General Hospital Site (17%)
- West Lincoln Memorial Hospital (13%)
- Douglas Memorial Hospital Site (3%)
- Port Colborne General Hospital Site (3%)

- All others: 1% or less
- Don't know (1%)

Questions: "Which hospital have you or a member of your household gone to most often for the health care services you have needed over the past 12 months?" [n=532]; "Which hospital would you consider to be your local community hospital?" [n=1000]

Local Hospital Usage by Community:

Significant regional variance in choice

- This slide depicts only the most prevalent hospital sites gone to most often by households in each community for the health care services they have needed over the past 12 months.
- **Fort Erie** ▶ Greater Niagara General (38%) > Douglas Memorial (36%) > Welland County General (12%)
- **Grimsby** ▶ West Lincoln Memorial (70%) > Juravinski Cancer Centre (10%)
- **Lincoln** ▶ West Lincoln Memorial (71%) > St. Catharines General (7%)
- **Niagara-on-the-Lake** ▶ St. Catharines General (41%) > Greater Niagara General (27%) > Hotel Dieu Shaver (8%)
- **Niagara Falls** ▶ Greater Niagara General (71%) > St. Catharines General (11%)
- **Pelham** ▶ Welland County General (37%) > St. Catharines General (22%)
- **Port Colborne** ▶ Port Colborne General (50%) > Welland County General (37%)
- **St. Catharines** ▶ St. Catharines General (59%) > Hotel Dieu Shaver (7%) > Greater Niagara General (6%)
- **Thorold** ▶ St. Catharines General (55%) > West Lincoln Memorial (15%) > Welland County General (9%)
- **Wainfleet** ▶ Haldimand War Memorial (37%) > Welland County General (31%) > Port Colborne General (21%)
- **Welland** ▶ Welland County General (67%) > Greater Niagara General (10%)
- **West Lincoln** ▶ West Lincoln Memorial (58%) > Haldimand War Memorial (15%)

Question: "Which hospital have you or a member of your household gone to most often for the health care services you have needed over the past 12 months?" [n=532]

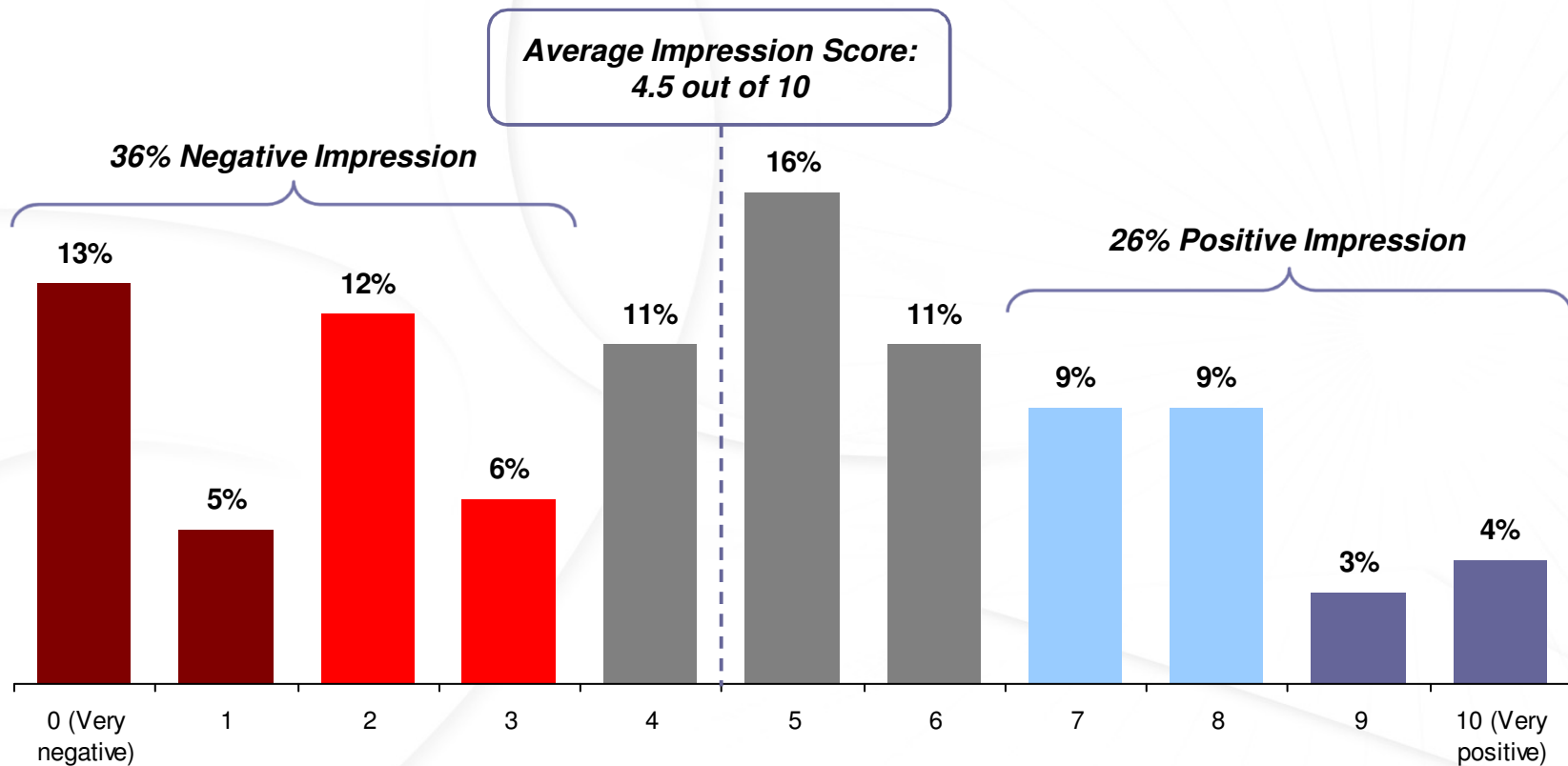
Part 2:
Impression Ratings

POLLARA 

Overall Impression of NHS:

Average impression score of 4.5 out of 10 among the lowest in Ontario

- The average impression score for the NHS among its catchment residents is 4.5 out of 10.

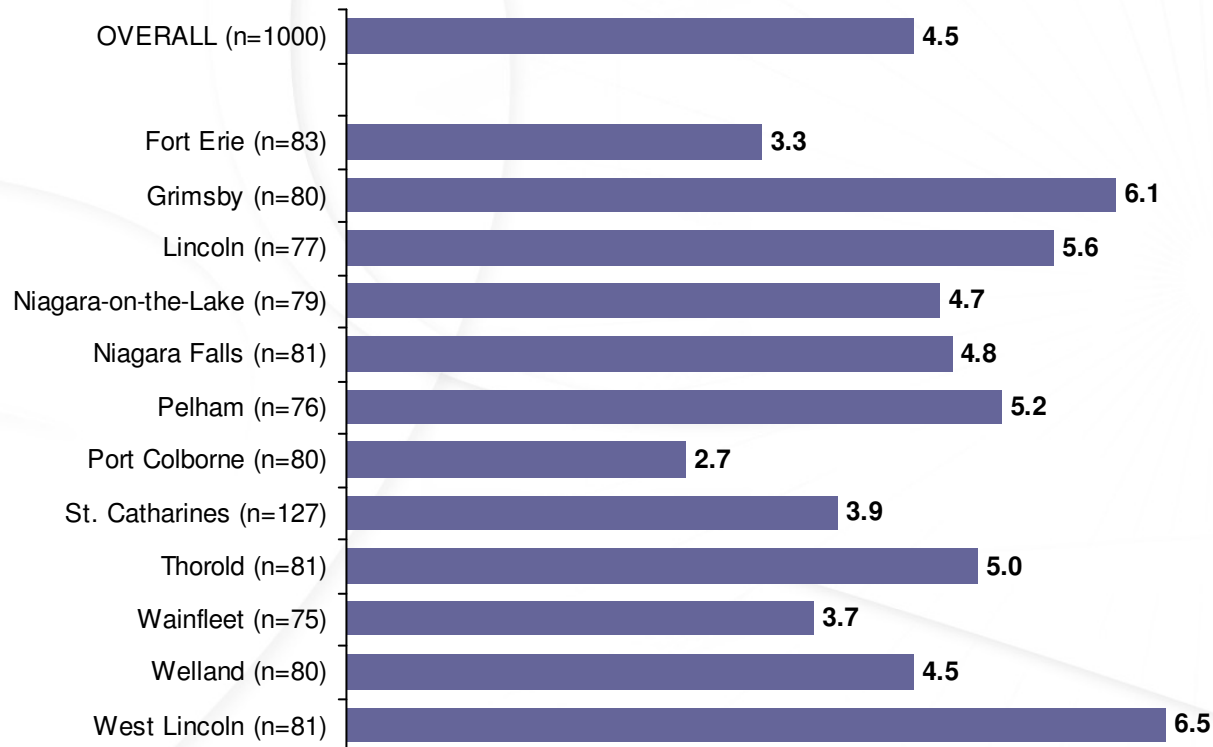


Question: "Overall, what is your impression of the Niagara Health System? Please use a scale from zero to 10, where zero means you have a 'very negative' impression and 10 means you have a 'very positive' impression." [n=1000]

Overall Impression of NHS by Community:

10 out of 12 communities have below-average impressions of the NHS

- The impression scores within each of the 12 component communities of the NHS catchment areas reveal particularly poor impressions within Port Colborne (2.7), Fort Erie (3.3), Wainfleet (3.7) and St. Catharines (3.9). The two best scores are in West Lincoln (6.5) and Grimsby (6.1).

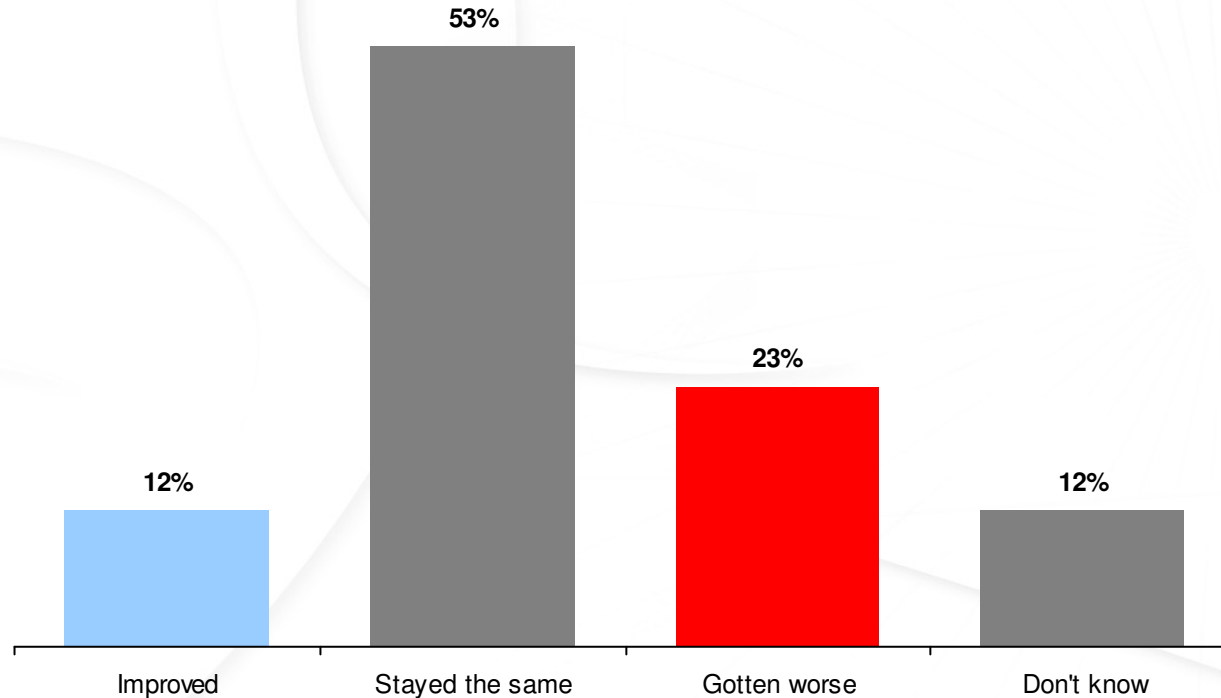


Question: "Overall, what is your impression of the Niagara Health System? Please use a scale from zero to 10, where zero means you have a 'very negative' impression and 10 means you have a 'very positive' impression." [n=1000]

Impression Momentum:

Most opinions of the NHS have not changed since the supervisor's appointment

- Most residents (53%) say their impression of the NHS has not changed since the appointment of the supervisor. Pelham is the only community wherein more residents say their opinion of the NHS has improved (21%) since the appointment of the supervisor than gotten worse (9%). There is a noteworthy difference among income groups: the improved/gotten worse ratio is better among higher-income groups (22%/19% among those earning >\$100k, 12%/21% among those earning \$50-\$100k, 7%/30% among those earning <\$50k).

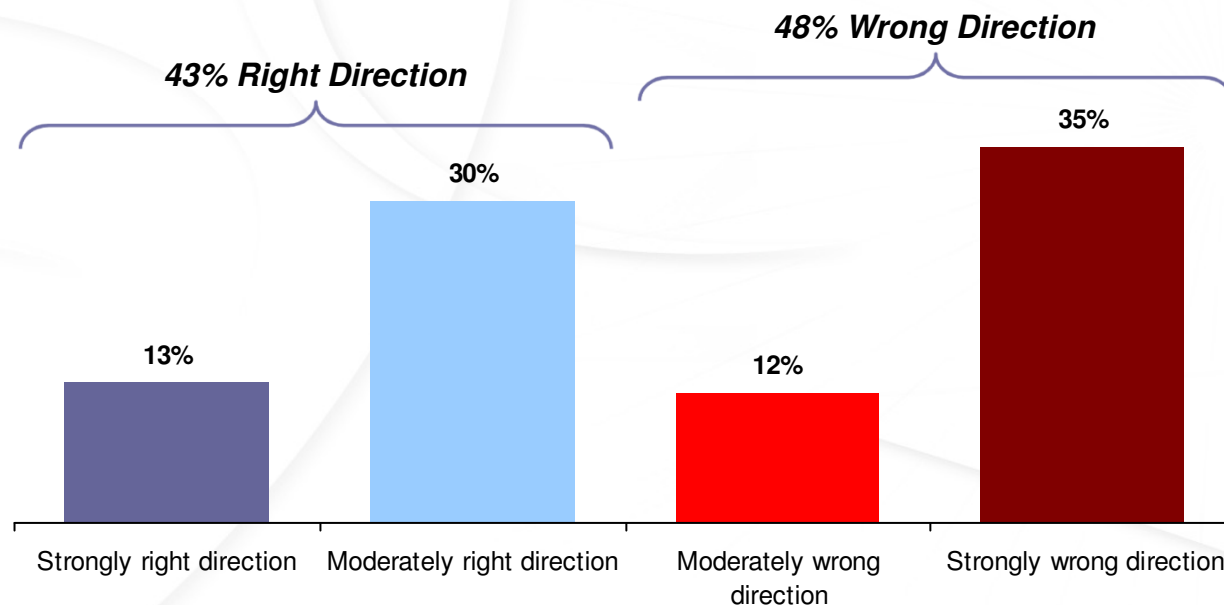


Question: "As you may know, the Ontario government appointed a supervisor to take control of the Niagara Health System in August 2011. Would you say your overall impression of the Niagara Health System has improved, gotten worse or stayed the same since the appointment of the supervisor?" [n=1000]

Current Direction of the NHS:

Moderate opinions divided; Strong opinions point to wrong direction

- Overall, residents are fairly divided on whether the NHS is currently headed in the right direction (43%) or the wrong direction (48%) (NB: 9% don't know). However, strong opinions on the matter tell a different story, as 35% feel strongly the NHS is headed in the wrong direction compared to just 13% who feel strongly that it is headed in the right direction. Residents in Pelham (57%), Thorold (56%) and St. Catharines (54%) are the most likely to say the NHS is currently headed in the right direction. Meanwhile, residents of Port Colborne (71%), Welland (64%) and West Lincoln (62%) are most likely to say the opposite. Those who have been to a hospital themselves in the past 12 months are significantly more likely to say the NHS is headed in the wrong direction than in the right direction (54% vs. 38%).

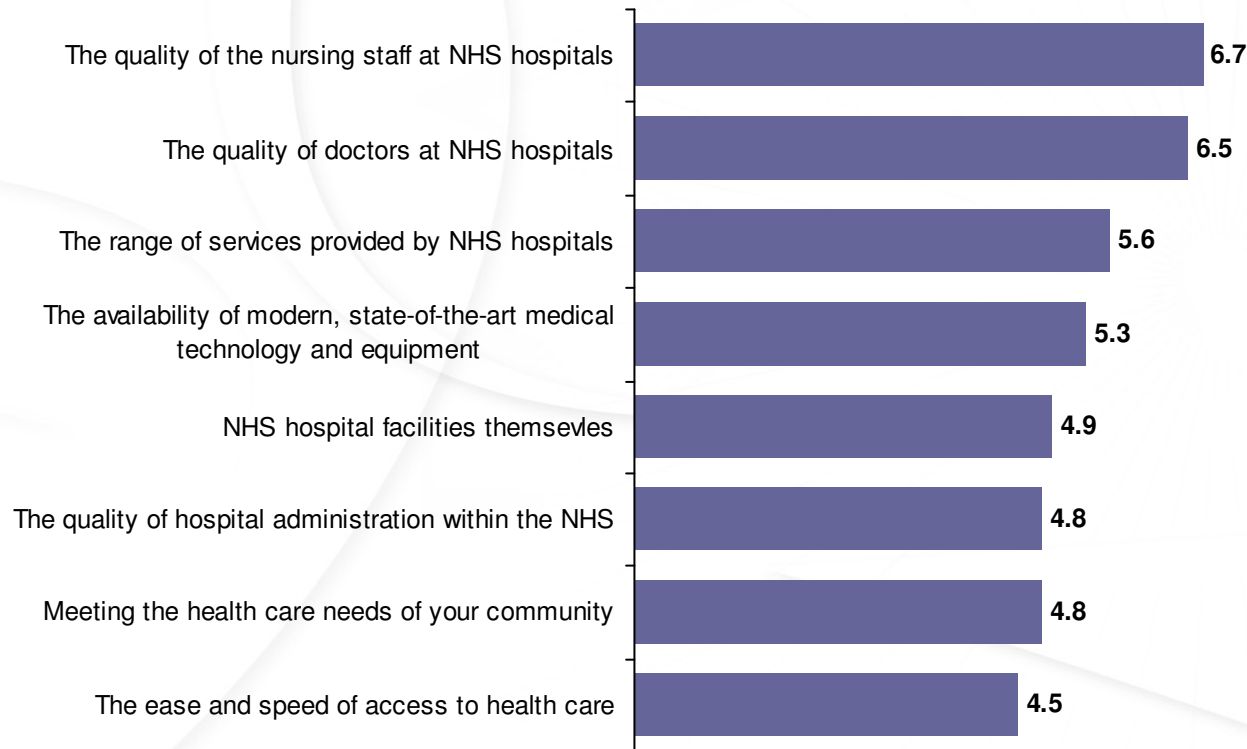


Question: "All things considered, would you say the Niagara Health System is currently headed in the right direction, or is it headed in the wrong direction? ...And do you feel strongly or moderately about that?" [n=1000]

Impression of NHS Attributes:

All attributes rated below average except quality of doctors and nursing staff

- NHS rated below average compared to other hospitals in Ontario on all of the attributes tested except the quality of the doctors and nursing staff. In terms of meeting the health care needs of the community, the NHS ranks highest in West Lincoln (6.4), Grimsby (5.9), Pelham (5.7) and Lincoln (5.5). Of those, only Pelham is principally served by an NHS site.

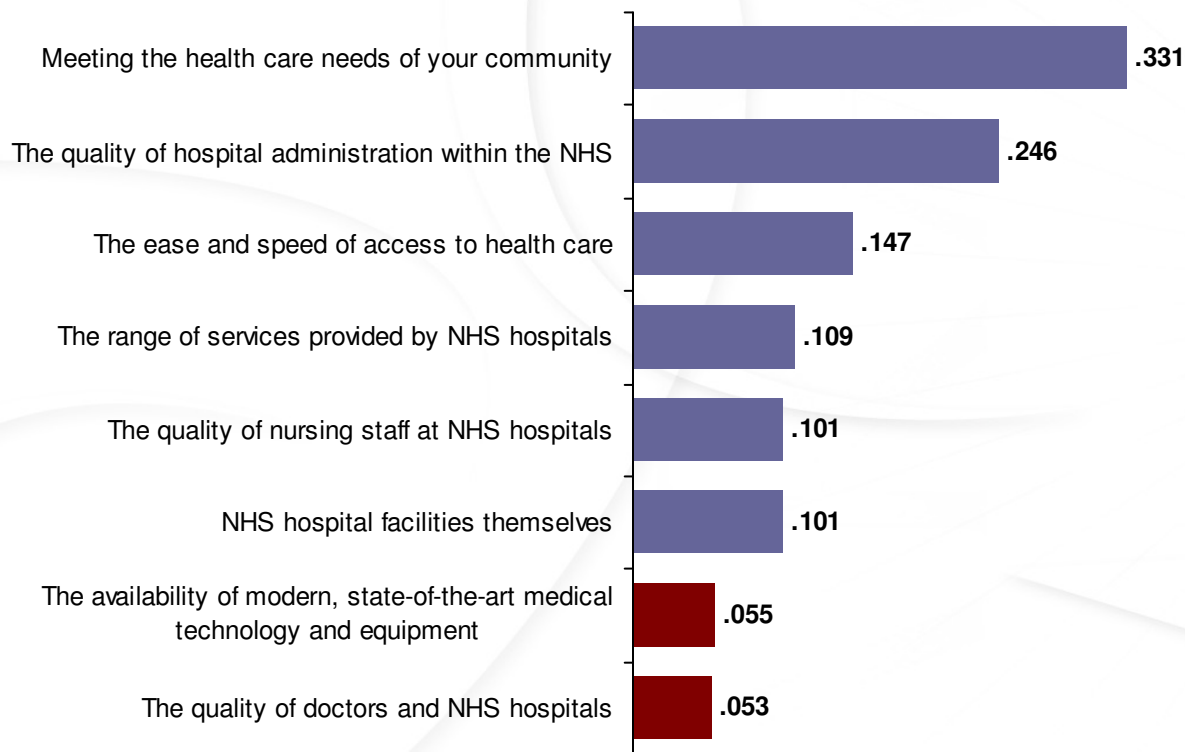


Question: "Now, I would like you to tell me your impression of each of the following aspects of the Niagara Health System. Please use the same zero-to-10 scale as before for each." [n=1000]

Relative Importance of Attributes on Overall Impression:

Quality of hospital administration should be a target for improvement

- A regression analysis was used to determine which attributes are the most important drivers of overall impression. Combined, these eight attributes explain 63% of an individual's overall impression of the NHS. The graph below shows the absolute standardized coefficient of each attribute, and this value shows how important each attribute is in explaining the overall impression ratings. Improving impressions of the attributes with the highest coefficients will have the most significant impact on improving overall impression.



These attributes play a significant role in explaining overall impression of the NHS. Changes in these attributes will have an impact on overall impression.

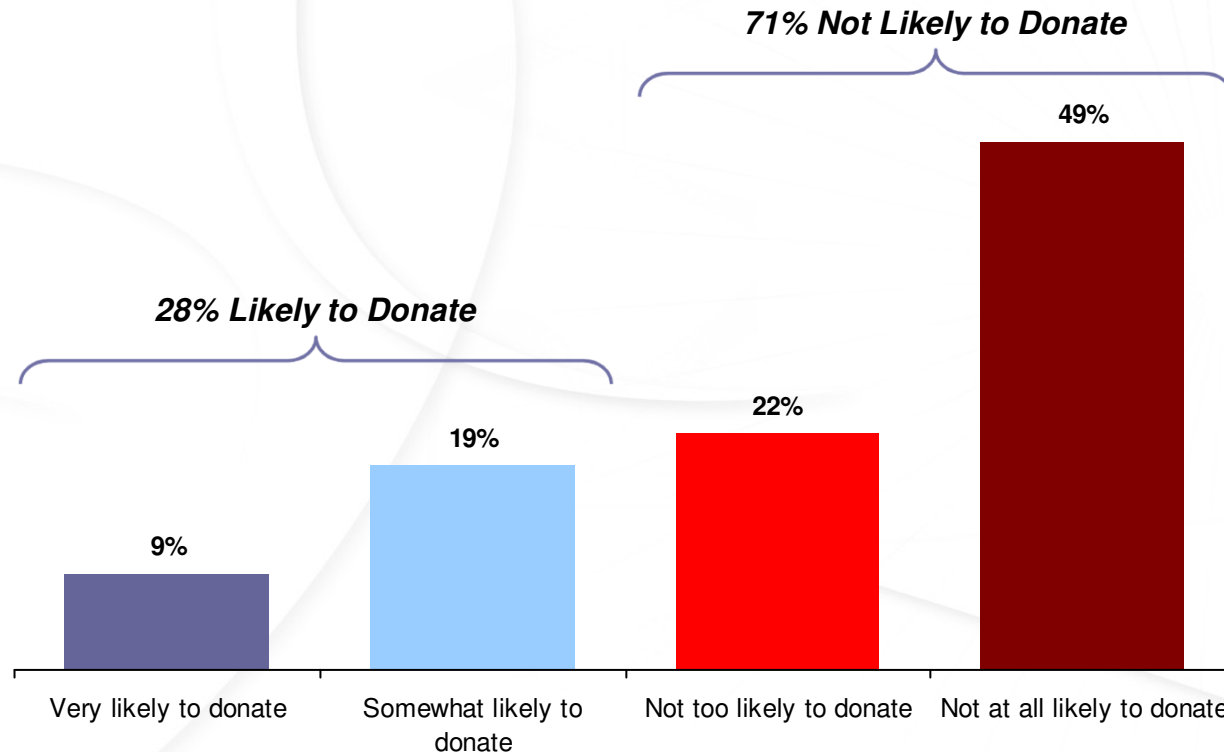
These attributes do not contribute significantly to overall impression of the NHS. Changes to these attributes will make little difference.

Question: "Now, I would like you to tell me your impression of each of the following aspects of the Niagara Health System. Please use the same zero-to-10 scale as before for each." [n=1000]

Likelihood to Donate:

Experience with the NHS is not helping to create good will

- Niagara residents who have been themselves or have had a family member go to a hospital for treatment in the past 12 months are no more likely to express a likelihood to donate to the NHS than those who have not (27% vs. 28%). This stands in contrast to the pattern of responses observed for most other Ontario hospitals and suggests a degree of dissatisfaction with the experience they or a family member have had while in the NHS's care.



Question: "How likely would you be to make a financial donation within the next 12 months to the Niagara Health System?"
[n=1000]

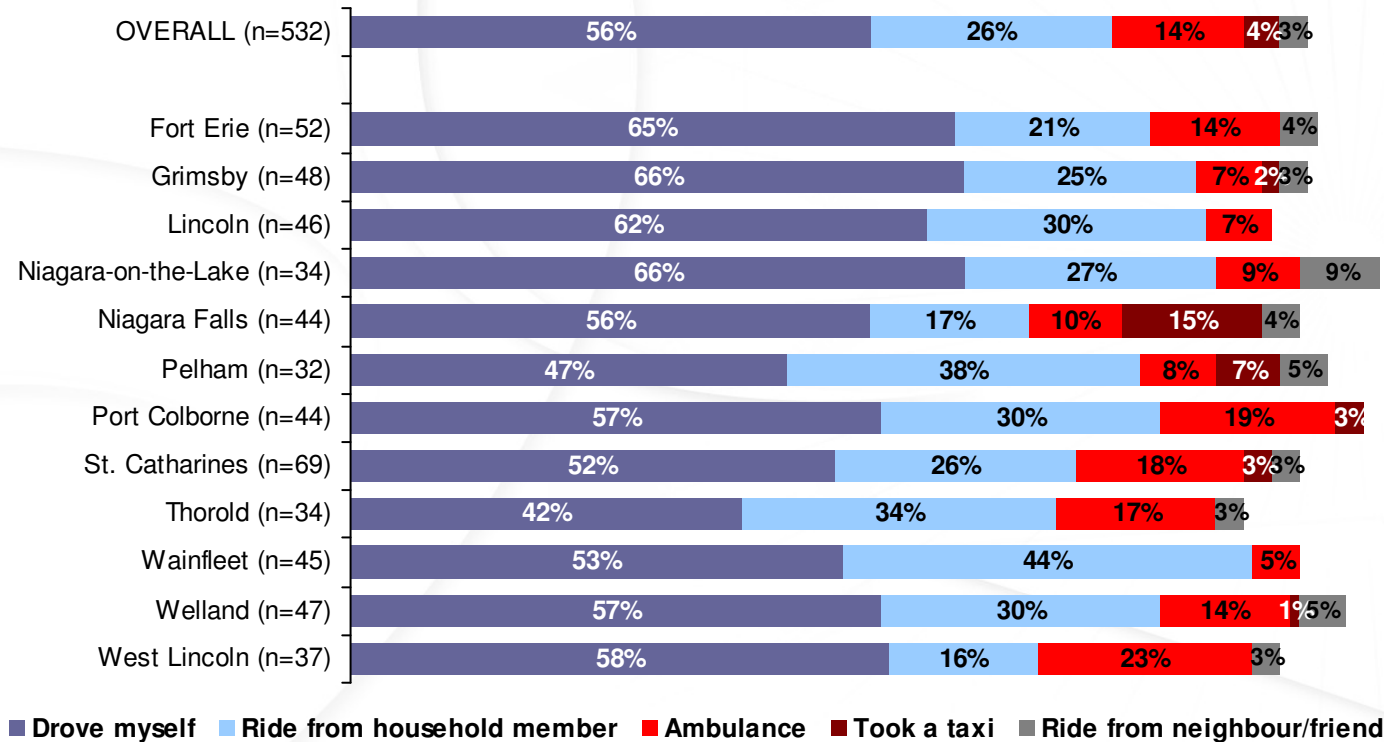
Part 3:
Traveling to Local Hospital

POLLARA 

Method of Transportation:

Most Niagara residents drive themselves to the hospital

- Income plays a notable role in method of transportation. Residents in higher income households (>\$100k/year) are much more likely to drive themselves to the hospital than lower income households (<\$50k/year) by a 76%-to-41% margin. Meanwhile 22% in lower income household took an ambulance, compared to just 5% in higher income households. Residents aged 55 and over are also more likely to have taken an ambulance to the hospital than those aged 18-34 (21% vs. 5%), although both age groups are equally as likely to have driven themselves.

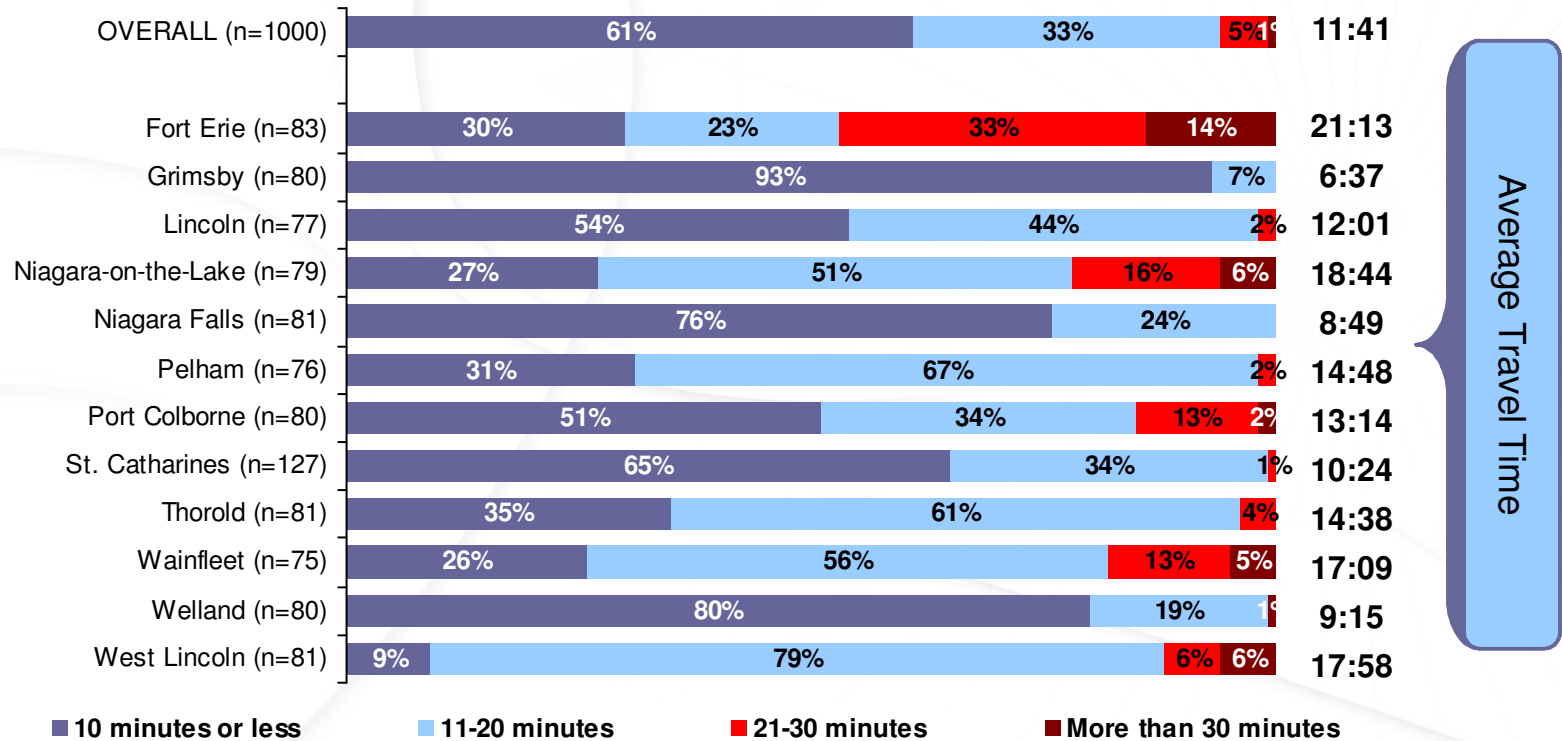


Question: "Thinking of the last time you or a member of your household went to a hospital as a patient, what method of transportation was used to get there?" [n=532]

Current Driving Distance:

Residents say they are a 11:41 drive from their closest hospital on average

- The average travel time of 11:41 across the region is not shared by all communities. Those living in Fort Erie (21:13), Niagara-on-the-Lake (18:44), West Lincoln (17:58) and Wainfleet (17:09) face significantly longer-than-average driving distances. Meanwhile, residents in Grimsby (6:37) and Niagara Falls (8:49) have below average travel times to their closest hospital. Whether related to geography or not, the perception of travel time increases with age, from an average of 9:55 among those aged 18-34 to an average of 13:22 among those aged 55 and over.

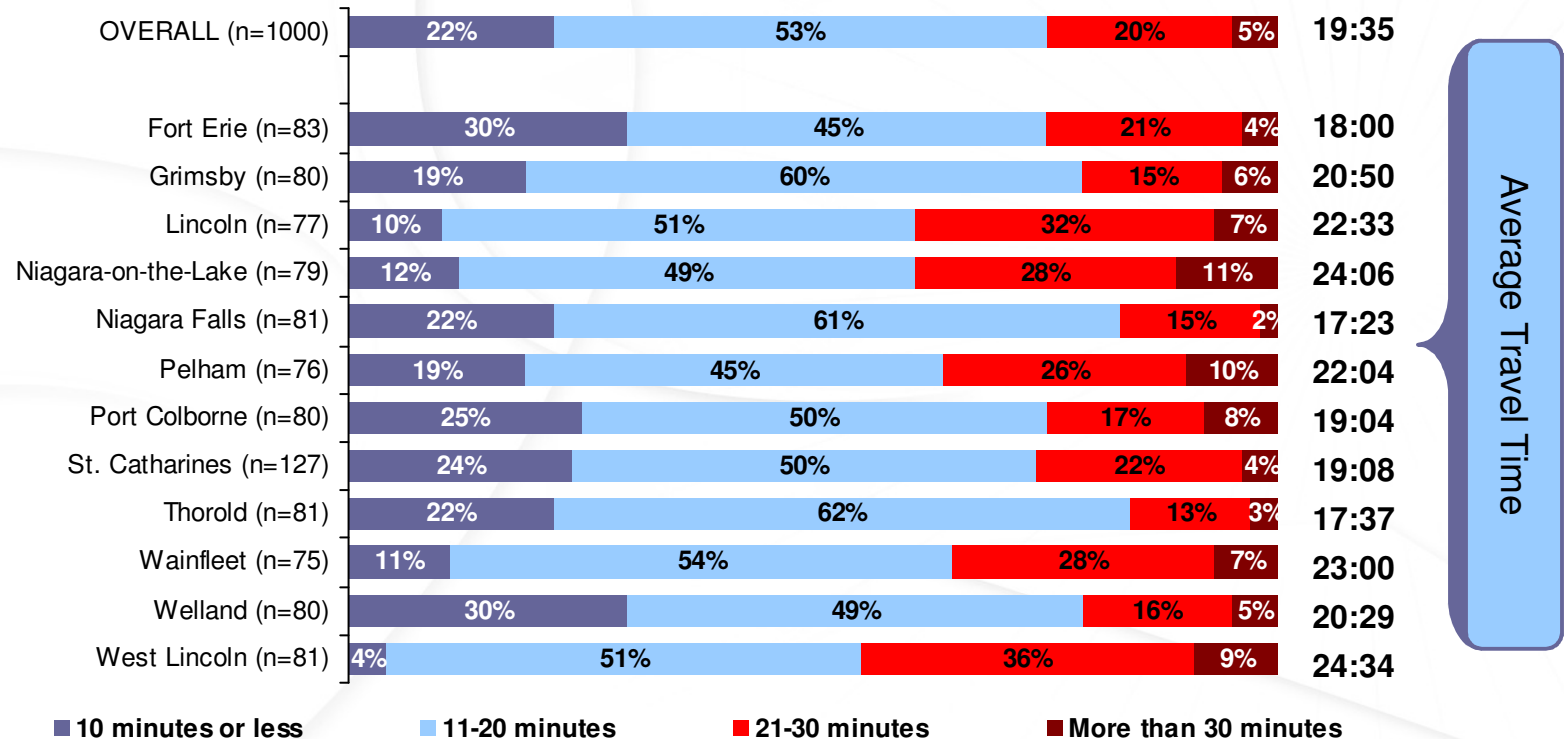


Question: "Roughly how long do you think it would take to get to the closest hospital from your home by car?" [n=1000]

Maximum Acceptable Driving Distance:

Residents willing to drive as much as 19:35 to their closest hospital on average

- With a maximum acceptable driving distance of 18:00, Fort Erie is the only community not willing to drive longer for hospital care than currently on average (21:13). In fact, Niagara region residents are willing to travel for an average of 7:54 longer for hospital care – an increase of 68%. On an individual basis, 56% of residents are willing to have a longer travel time to the hospital than they do currently, compared to 34% who want travel times to stay the same and 10% who want to travel for less time.

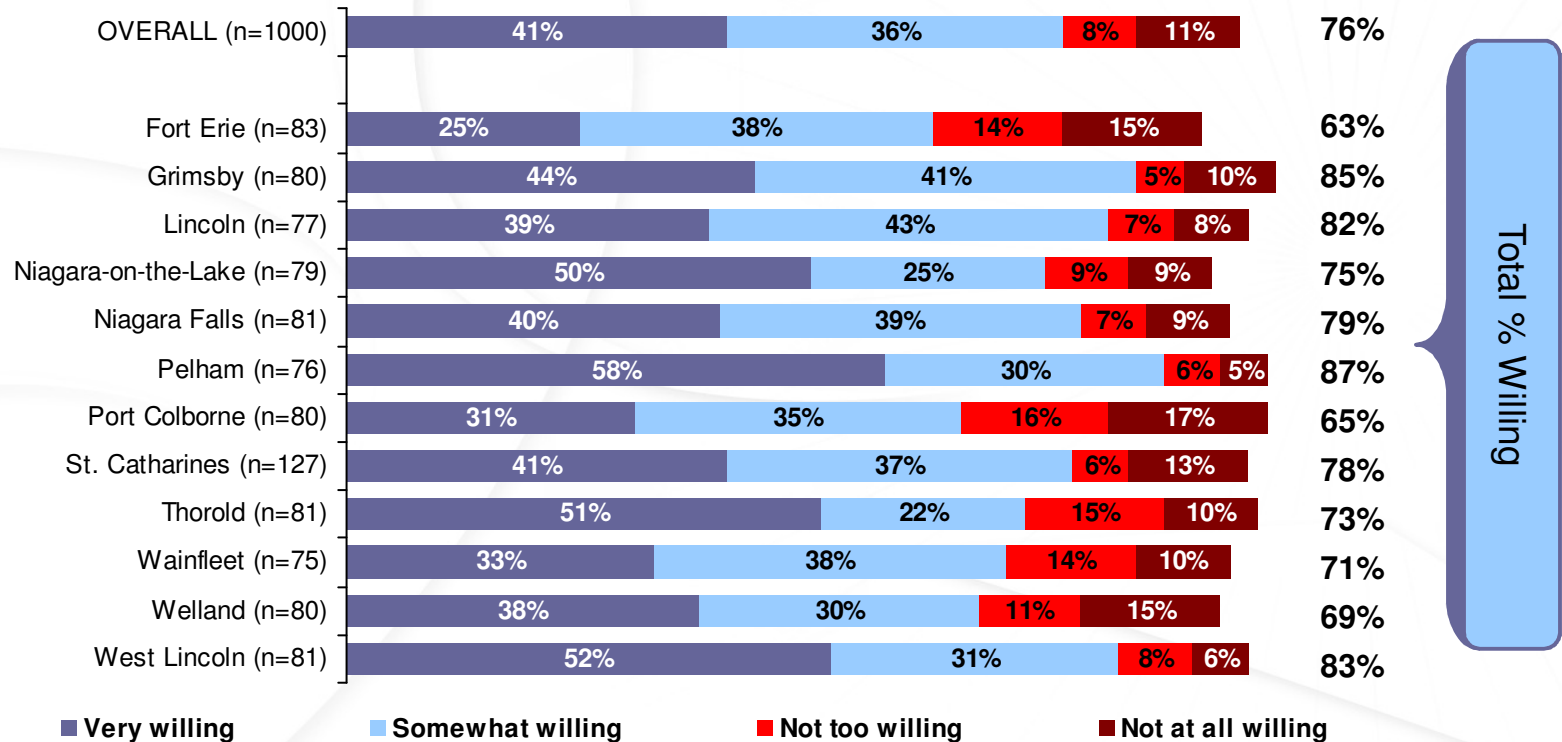


Question: "Generally speaking, what do you think is the maximum amount of time it should reasonably take somebody to drive to their local hospital from their home? That is, at what point would a hospital be too far away?" [n=1000]

Willingness to Travel for Higher Quality of Care:

Three quarters willing to drive as much as 30 minutes further for the best care

- It should be noted that this question was asked after respondents were asked about the supervisor's recommendation to close certain sites and open new facilities. This helps explain why the willingness to travel further – while still a majority – is somewhat lower in the four directly affected communities of Port Colborne, Fort Erie, Niagara Falls and Welland (72% combined). By comparison, the willingness to travel further for the best available care is 79% in the rest of the Niagara Region combined.



Question: "Overall, how willing would you be to travel as much as 30 minutes further for hospital care services if you knew the extra distance travelled meant that you could get the highest quality of care possible?" [n=1000]

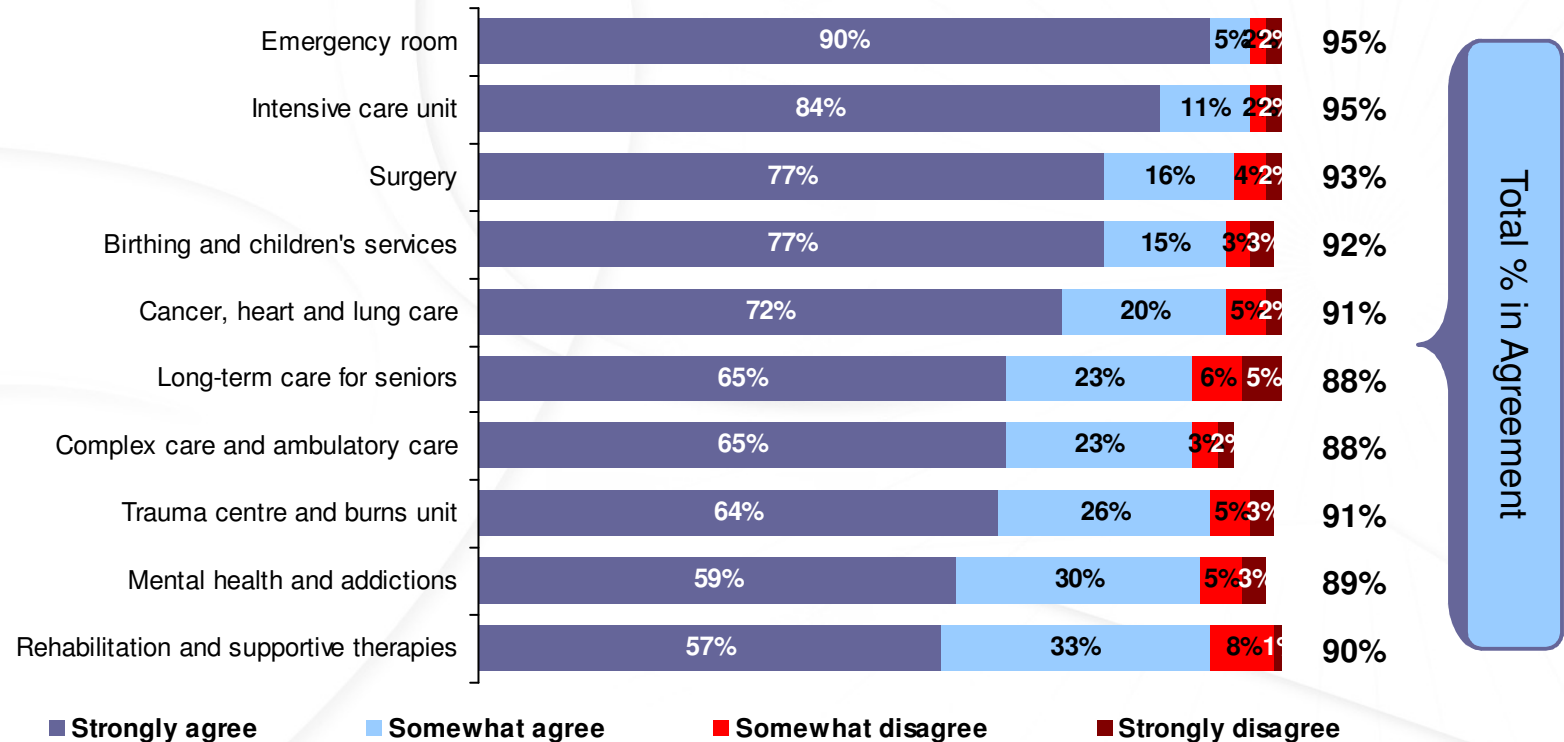
Part 4:
Attitudes Towards Hospital Care Delivery

POLLARA 

Essential Hospital Care Services:

Directly affected communities react most negatively to recommended closures

- As the “Total % in Agreement” figures in the chart below show, roughly nine in 10 respondents agree that all of the tested hospital services are essential to their community. It’s the *intensity* of that agreement that reveals priority areas – namely ER, ICU, surgery, and paediatrics/maternity. For each of the six remaining services, there is some flexibility from the public’s perspective in terms of what is offered and at what sites. Mental health/addictions is particularly important in St. Catharines (70%), but otherwise all services are similarly important to each community (within the survey’s margin of error).

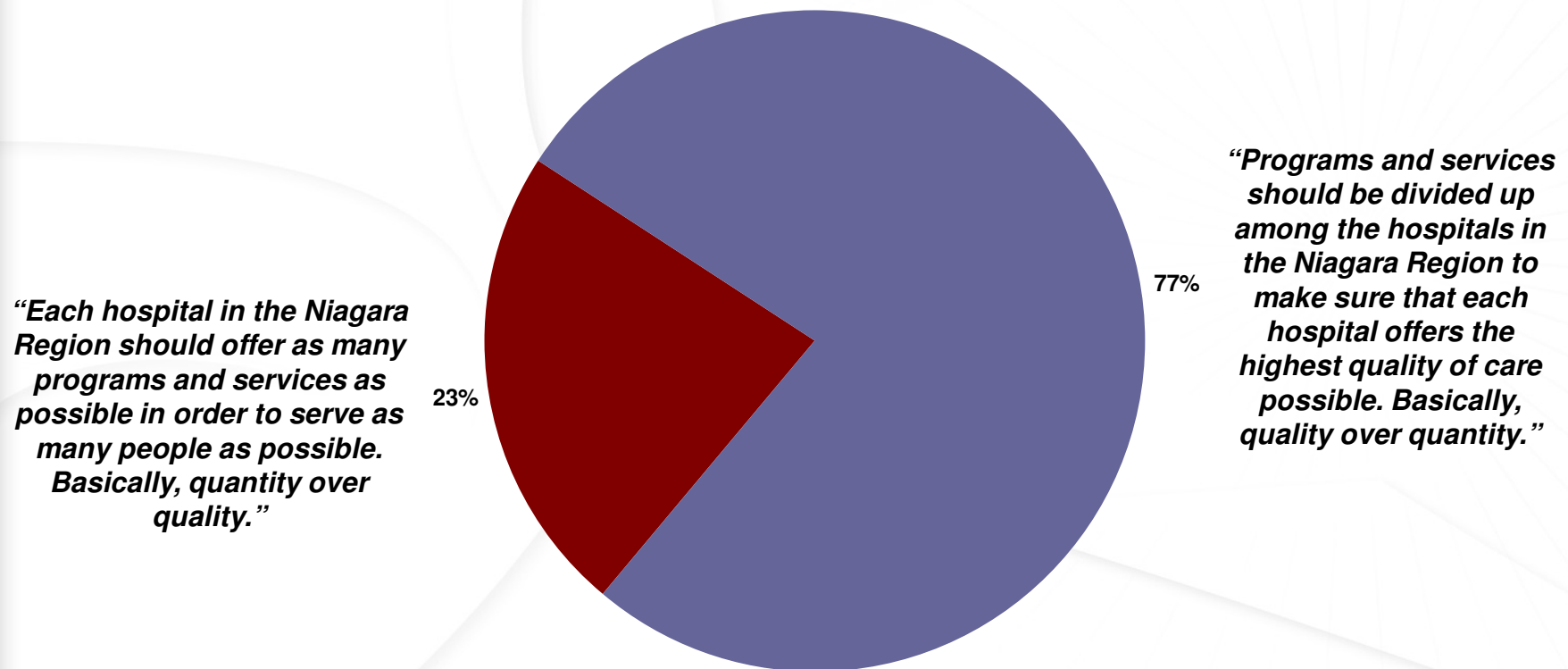


Question: “I am going to read you a list of some hospital care services that may or may not be offered at various hospitals throughout the Niagara Region. For each, please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree that it is an essential service to your community?” [n=1000]

Attitudes Towards Guiding Principle of Care:

Three-quarters choose “quality” over “quantity”

- Most Niagara Region residents (77%) side with the viewpoint that “programs and services should be divided up among the hospitals in the Niagara Region to make sure that each hospital offers the highest quality of care possible. Basically, quality over quantity.” The principle of quality is preferential to the principle of quantity in all 12 communities and across all demographic and socio-economic groups.



Question: “I am now going to read you a couple different viewpoints regarding how hospital programs and services should be provided. Which one comes closest to your own viewpoint?” [n=1000]

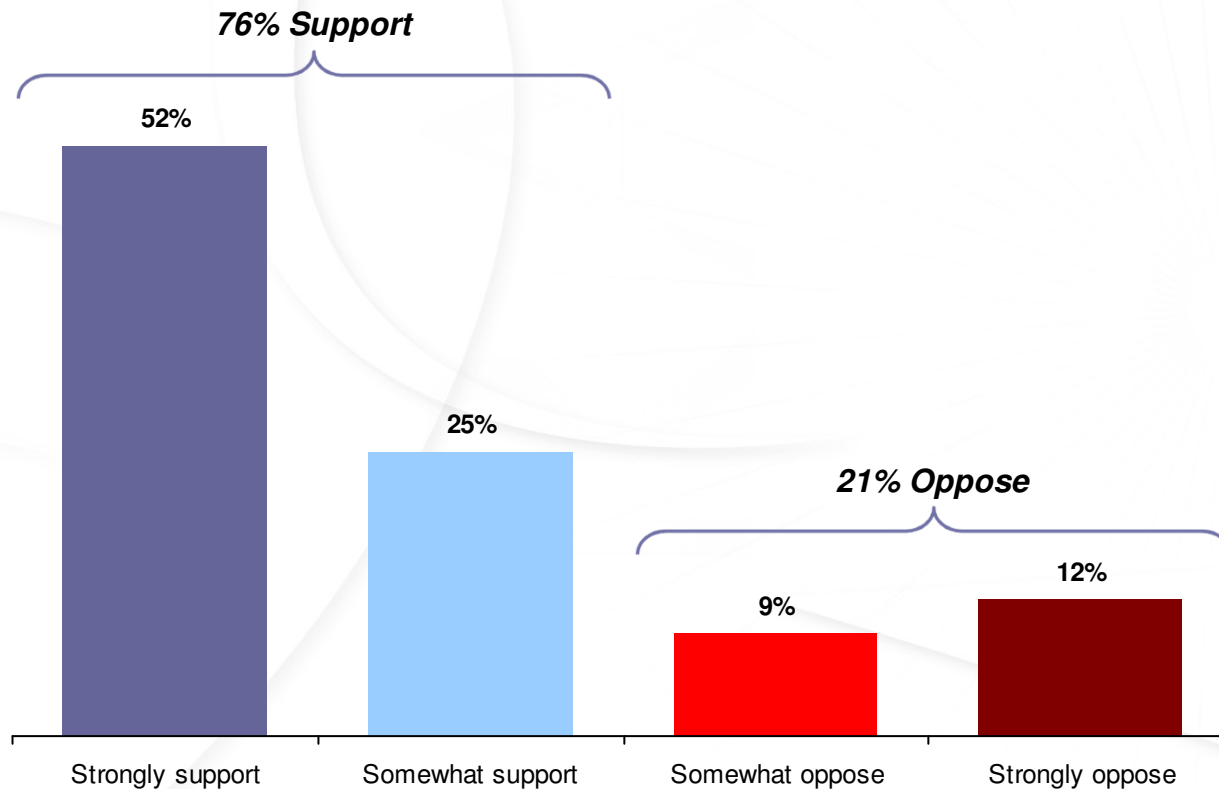
Part 5:
Community Response to Restructuring Proposal

POLLARA 

Support for New Facilities:

Three-quarters of residents support the proposed new facilities on their own

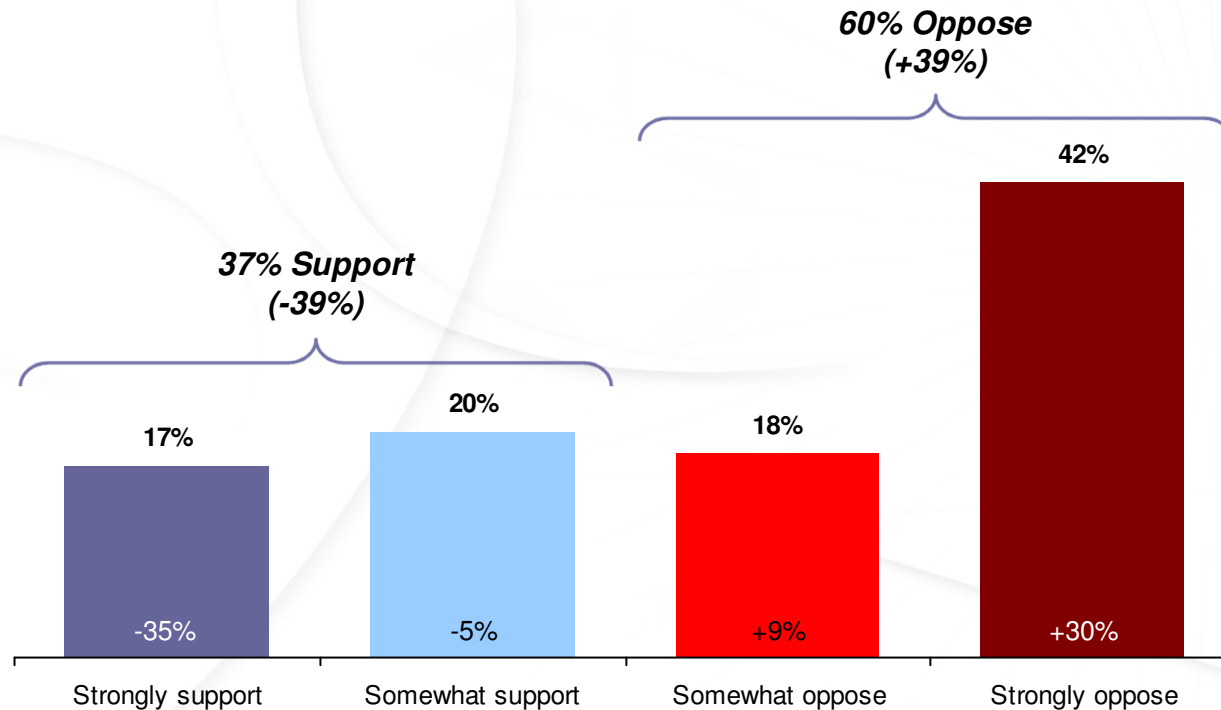
- Within a vacuum, 76% of Niagara region residents say they support opening a new general acute care hospital and a new urgent care centre in South Niagara. Support is strong across all 12 communities, even those in North Niagara such as Niagara-on-the-Lake (78%) and St. Catharines (85%).



Question: "How much would you support or oppose opening a new general acute care hospital and a new urgent care centre in a conveniently accessible location somewhere in South Niagara?" [n=1000]

Support for New Facilities While Closing Others: Majority support reverts to majority opposed amid 39-point swing

- Support for the new facilities erodes when offset by the proposed closures in Port Colborne, Fort Erie, Niagara Falls and Welland. Only 37% of residents continue to support the restructuring in this case, a decrease of over 50%. However, a majority of those in households earning over \$100,000 annually would continue to support the recommended openings despite the closures (56%).



Question: "Now, how much would you support or oppose closing the existing hospital sites in Port Colborne, Fort Erie, Niagara Falls and Welland and replacing them with a new general acute care hospital and a new urgent care centre in a conveniently accessible location somewhere in South Niagara?" [n=1000]

Support Retention Pools:

Most of those who support the openings would oppose them due to closures

- A majority of those who support opening a new general acute care hospital and a new urgent care centre in South Niagara would oppose it if it meant closures in Port Colborne, Fort Erie, Niagara Falls and Welland (53%). Meanwhile 15% of those who originally opposed the new openings would actually support them alongside the concomitant closures. Having said that, the general trend is that the recommended closures make Niagara Region residents less likely to support the recommended openings.

Support for Openings →	TOTAL SUPPORT	Strongly Support	Somewhat Support	TOTAL OPPOSE	Somewhat Oppose	Strongly Oppose
Support for Openings/ Closures ↓						
TOTAL SUPPORT	44%	48%	35%	15%	18%	13%
Strongly Support	21%	27%	7%	6%	3%	7%
Somewhat Support	23%	21%	29%	10%	15%	6%
TOTAL OPPOSE	53%	48%	63%	84%	81%	86%
Somewhat Oppose	19%	17%	22%	14%	23%	9%
Strongly Oppose	34%	31%	41%	69%	57%	77%

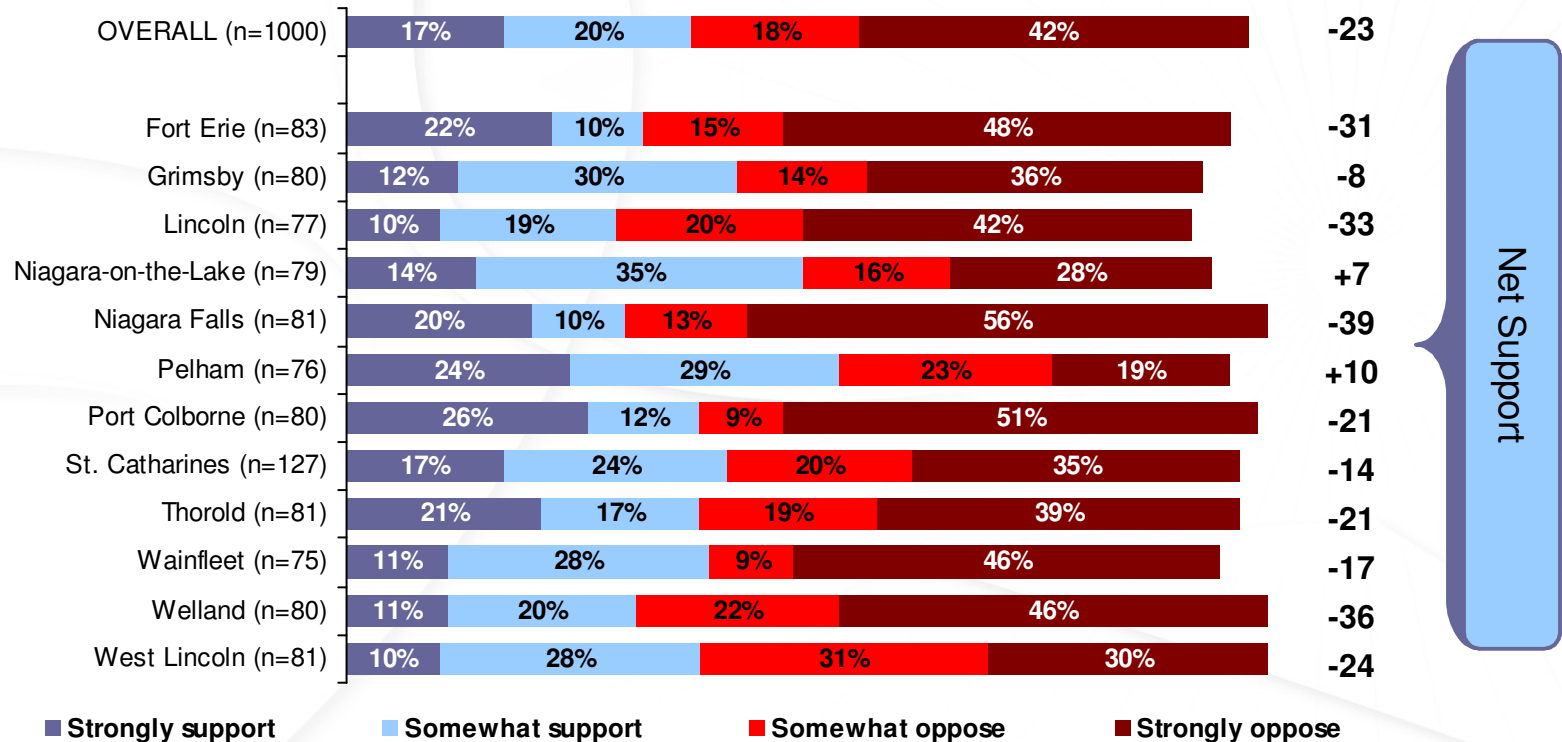
NB: Highlighted cells in table above denote the proportion of respondents who provided the same answer to both questions.

Questions: "How much would you support or oppose opening a new general acute care hospital and a new urgent care centre in a conveniently accessible location somewhere in South Niagara?" [n=1000]; "Now, how much would you support or oppose closing the existing hospital sites in Port Colborne, Fort Erie, Niagara Falls and Welland and replacing them with a new general acute care hospital and a new urgent care centre in a conveniently accessible location somewhere in South Niagara?" [n=1000]

Support for Restructuring by Community:

Directly affected communities react most negatively to recommended closures

- A couple of communities continue to have majority support for the recommended openings and closures; i.e., Niagara-on-the-Lake (50%) and Pelham (52%). The four directly affected communities – Port Colborne, Fort Erie, Niagara Falls and Welland – all react negatively to the recommended closures. The combined net support of these four communities is a strongly negative -35. Meanwhile, net support throughout the rest of the Niagara Region combined is not nearly as negative, at -13.



Question: "Now, how much would you support or oppose closing the existing hospital sites in Port Colborne, Fort Erie, Niagara Falls and Welland and replacing them with a new general acute care hospital and a new urgent care centre in a conveniently accessible location somewhere in South Niagara?" [n=1000]

Main Reasons for Position on Restructuring:

Site location is the most significant reason for opposing the restructuring

- Fears about the adverse impact of reducing/changing hospital site locations represent the primary reasons for opposing the recommended openings and closures. If the restructuring is to gain any measure of public support, location-related concerns must be allayed. A careful study into optimal locations for the proposed new facilities will be necessary to ensure easy access well within the 19:35 travel time tolerance threshold for the region and the 17:23 threshold for Niagara Falls in particular.

Main Reasons for Supporting the Recommendation

- **Current facilities are old / in disrepair (23%)**
- **Good idea (20%)**
- **Location: Current sites not accessible / too far (13%)**
- **New facilities will have modern equipment / technology (12%)**
- **New facilities will provide better continuity / quality of care (11%)**
- **Location: Centralized / Conveniently located (10%)**
- **New facilities will be more cost efficient (9%)**
- **Location: Each city needs its own site (8%)**
- **All others: 4% or less**
- **Don't know (4%)**

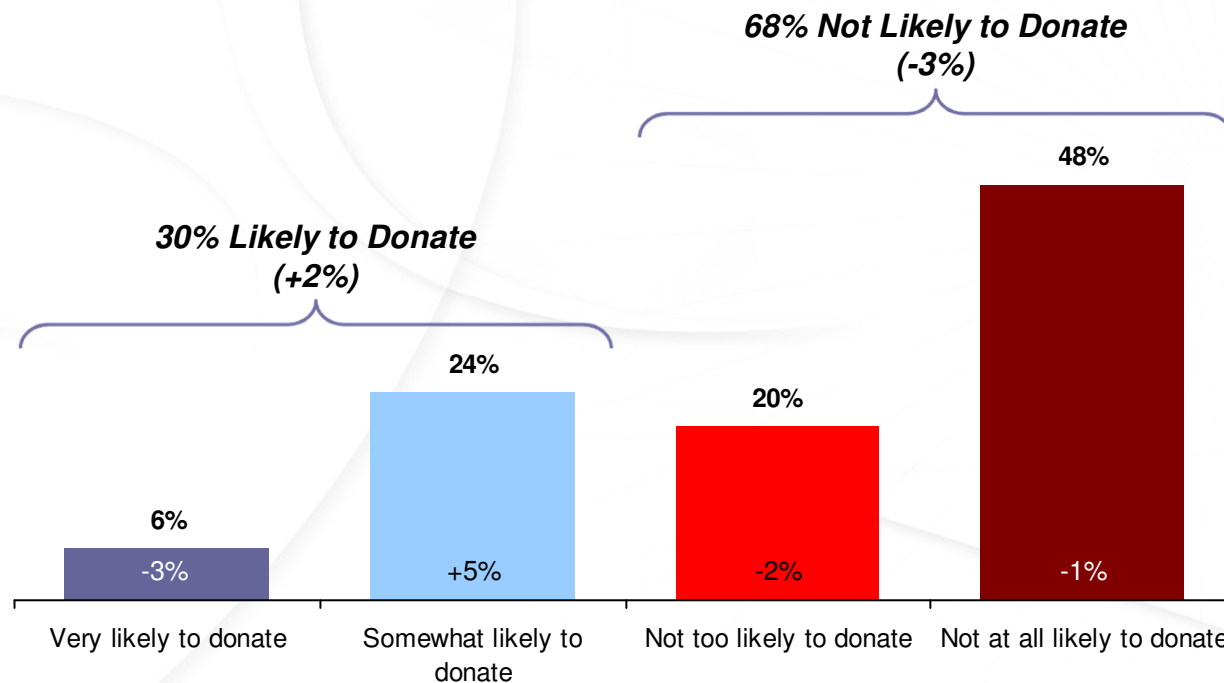
Main Reasons for Opposing the Recommendation

- **Location: New sites not accessible / too far (51%)**
- **Location: Each city needs its own site (21%)**
- **Bad idea (9%)**
- **Concern about wait times increasing (8%)**
- **Nothing wrong with current facilities (7%)**
- **Location: Possible loss of life due to increased travel time (7%)**
- **Should improve current facilities instead (6%)**
- **Costing tax payers / wasteful (6%)**
- **All others: 5% or less**
- **Don't know (1%)**

Question: "What is the main reason why you [support/oppose] closing the existing hospital sites and replacing them with new facilities as described?" [Support n=396; Oppose n=555]

Likelihood to Donate If NHS Proceeds with Restructuring: *Net donor behaviour largely unchanged despite opposition to closures*

- Overall, the likelihood to donate to the NHS remains roughly the same if the restructuring plan is approved. However, the small changes in the overall numbers belie massive shifts in the underlying numbers. In terms of donor retention, just 61% who initially said they would be likely to donate would maintain this position if the plan were to proceed. Meanwhile, the closures and openings would inspire 18% of those who were initially unlikely to donate to become likely donors. Part of this is explained by gender as men grow less likely to donate and women grow more likely with the restructuring. There is also a regional component as likely donors in Grimsby, West Lincoln and Welland are lost while others are gained in St. Catharines and Wainfleet.

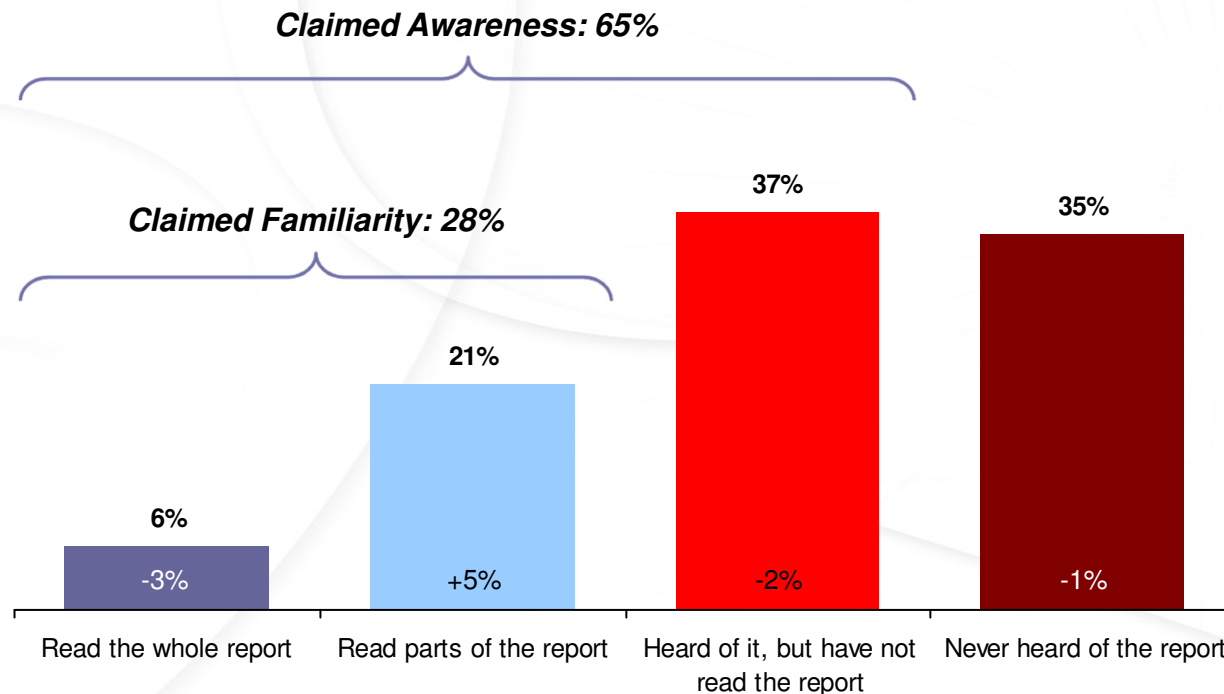


Question: "Now, please imagine that the plan to close the existing hospital sites in Port Colborne, Fort Erie, Niagara Falls and Welland and replace them with a new general acute care hospital and a new urgent care centre in a conveniently accessible location somewhere in South Niagara is approved. If this happens, how likely would you be to make a financial donation within the next 12 months to the Niagara Health System?" [n=1000]

Awareness of Supervisor's Interim Report:

Two-thirds say they are aware of the report; A quarter claim to have read it

- Those who claim to be aware of the report also tend to have a more negative impression of the NHS (4.1 out of 10 vs. 5.1 for the unaware) and are more likely to say the NHS is headed in the wrong direction (52% vs. 40% for the unaware). They are, however, more likely to support the restructuring plan (40% vs. 32% for the unaware).
- It should be noted that these are self-reported figures that likely suffer from the pitfalls of social desirability bias. As such, the claimed awareness and readership numbers are probably overstated to some degree.



Question: "As you may know, NHS Supervisor Dr. Kevin Smith recently released a report to the Niagara community on the restructuring of the Niagara Health System. How familiar are you with this report?" [n=1000]

POLLARA

1255 Bay Street, Suite 900

Toronto, ON M5R 2A9

Tel: 416.921.0090 | Fax: 416.921.3903

www.pollara.com