

Niagara Health Public Opinion Poll 2016



niagarahealth
Extraordinary Caring. Every Person. Every Time.

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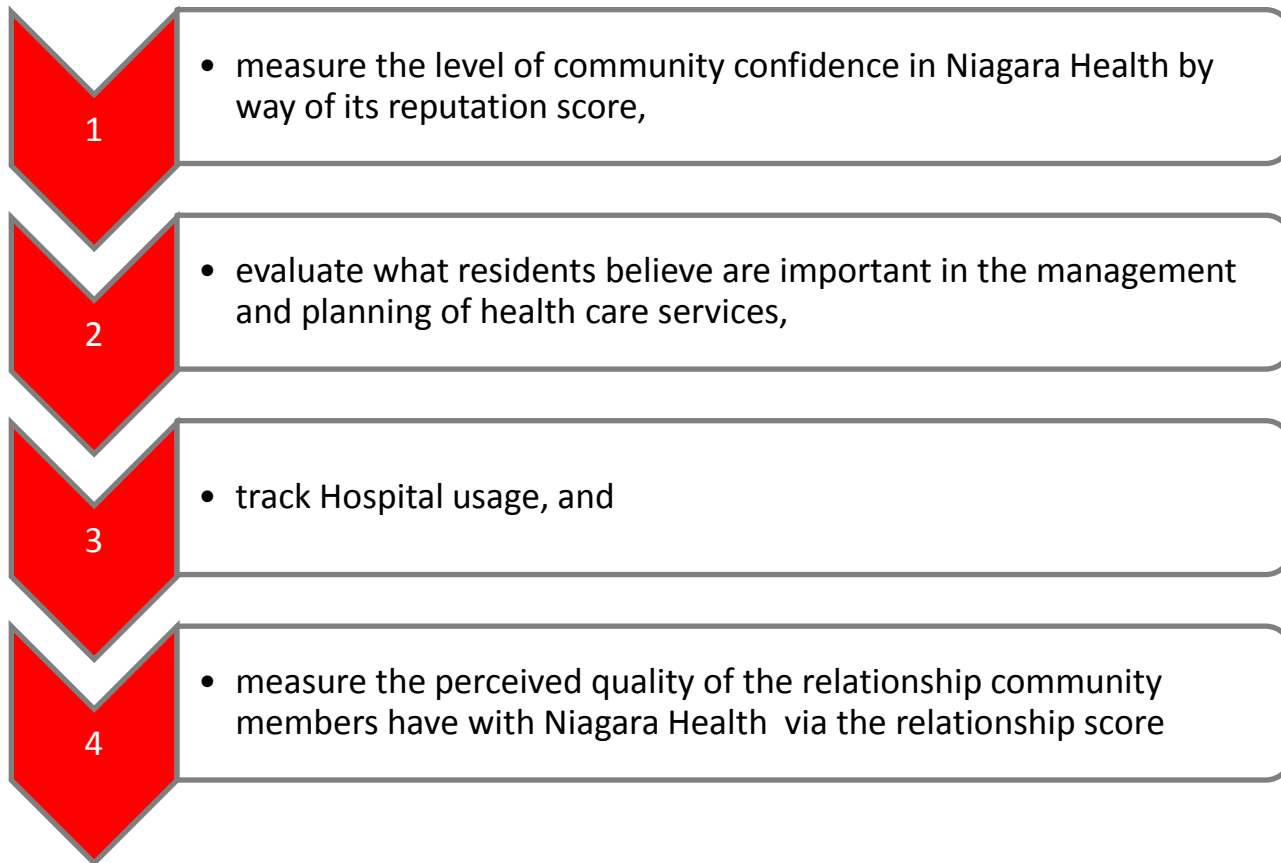
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THE RESEARCH INTELLIGENCE GROUP

CONTEXT AND OBJECTIVES

The purpose of this study was to gauge Niagara residents' attitudes, perceptions, and levels of familiarity with Niagara Health. Where possible, we will compare this year's those from previous years.

Specifically, we aim to:



METHODOLOGY

A survey of 1001 Canadians, living in the Niagara region, was completed via telephone between August 30 and Sept 9, 2016.

For the purpose of this research, the Niagara Health 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.

A probability sample of the same size would yield a margin of error of +/- 3%, 19 times out of 20.



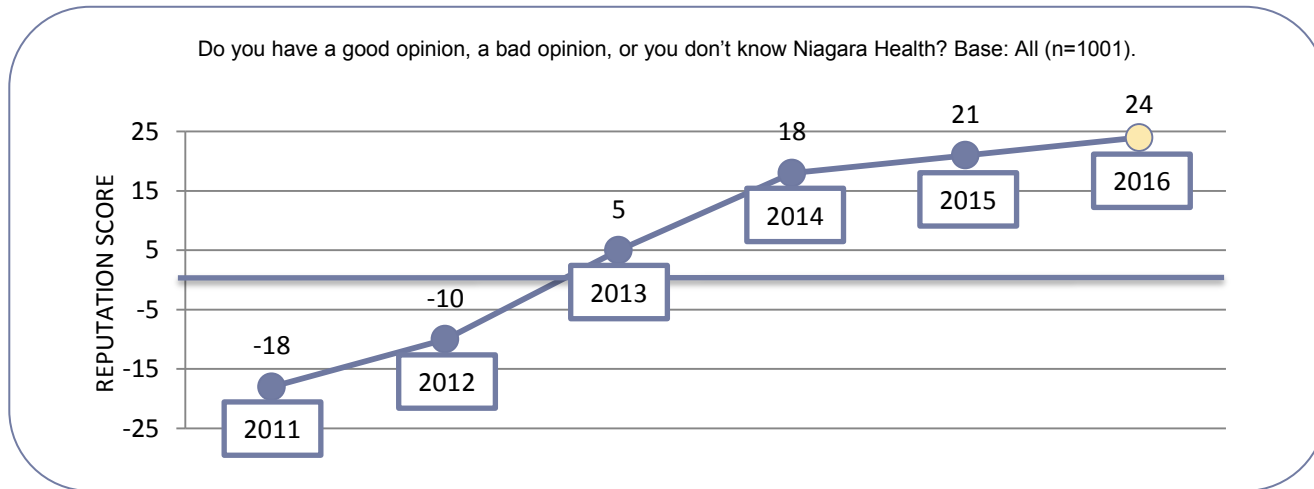
Key Insights

KEY INSIGHTS

THIS IS LARGELY A “GOOD NEWS” STORY

Niagara Health has made headway on a number of key questions and measures this wave.

- Not only has its **Reputation Score increased five points (from +21 to +24)**, measures of trust, commitment, transparency, and influence have all increased significantly since last year.
- Satisfaction levels with its services, and with the way it operates, have both seen significant increases over last year, as has the proportion of Niagara residents rating Niagara Health as “the best hospital.”
- Agreement levels on the six statements tested have all increased as well, and most of them have done so significantly since last year (i.e. all except “Niagara Health has the ability to accomplish what it says it will do”).



KEY INSIGHTS

NIAGARA HEALTH IS MOVING IN THE RIGHT DIRECTION

Half continue to believe Niagara Health is moving in the *right* direction. Though 27% believe its headed in the *wrong* direction, this percentage is significantly lower than last year. More specifically, it's at its lowest point on record.

THOSE 75+ ARE SOME OF NIAGARA HEALTH'S BIGGEST AMBASSADORS

Seventy-eight percent of those 75+ are satisfied with the services offered by Niagara Health. Furthermore, average ratings from this age group were higher than any other age group, when it came to rating Niagara Health on a 5-point scale, where a 5 indicated "the best hospital." These respondents were also more likely to agree with nearly every one of the statements tested (i.e. all except the statement relating to their level of confidence in Niagara Health's skills). Finally, they are also among those most likely to have heard of the ONE Foundation. Despite this, these respondents aren't any more likely to donate to Niagara Health (vs. other age groups). Keeping them abreast of any changes, as well as catering to their specific needs, may change an already satisfied group that is full of praise, into one that is also more likely to donate.

CONTINUED PROMOTION OF THE PROPOSED CHANGES VIA ALL AVAILABLE CHANNELS IS RECOMMENDED

More residents than last year are aware of the proposed changes to way Niagara Health will provide care across the region (32% vs. 27% last year). It is important to note that those more likely to be aware of these changes include residents:

- who are *dissatisfied* with Niagara Health's services (45% vs. 31% among those who are *satisfied*), and residents
- with a *bad opinion* of Niagara Health (41% vs. 31% among those with a *good opinion*).

Though digital media has had an impressive first showing (especially social media), pulling down percentages for traditional media sources, like newspapers, continued promotion of the proposed changes via all available channels is recommended, given (a) the wide age range of affected residents, and (b) the fact that those 75+ are among Niagara Health's biggest ambassadors *and* more likely to heard of these changes from a newspaper (relative to younger respondents).

A RESIDENT'S OPINION OF NIAGARA HEALTH IMPACTS SUBSEQUENT ANSWERS

An opinion of Niagara Health was one of the first questions posed to respondents, and that initial opinion colours respondents' answers to many subsequent questions. For example, there is a strong relationship between a respondent's opinion of Niagara Health and how he or she rates Niagara Health in terms of trust, commitment, transparency, and influence. Those who have a good opinion of Niagara Health tend to rate it significantly higher on each measure. Those who have a good opinion of Niagara Health also tend to:

- be much more satisfied, both in terms of the services being offered and in how it operates;
- rate Niagara Health as “the best hospital”, when rating it on a 5-point scale;
- show significantly higher levels of agreement for each statement tested, especially for:
 - a) “Niagara Health treats people like me fairly and justly,” and
 - b) “I feel very confident about Niagara Health’s skills;”
- believe it is heading in the right direction;
- be satisfied with the proposed changes to way Niagara Health will provide care across the region; and
- be more likely to donate.

Satisfaction levels with Niagara Health play a similar role. For example, when rating Niagara Health on a 5-point scale, those already satisfied with Niagara Health's services are much more likely to rate it as “the best hospital” (i.e. a 4 or 5 out of 5). Residents already satisfied with Niagara Health's services are also more likely to:

- believe it is heading in the right direction,
- be satisfied with the proposed changes to way Niagara Health will provide care across the region; and
- be more likely to donate.

To a lesser extent, any past experience with Niagara Health weighs on respondent opinions as well, including their likelihood to donate.

Detailed Results

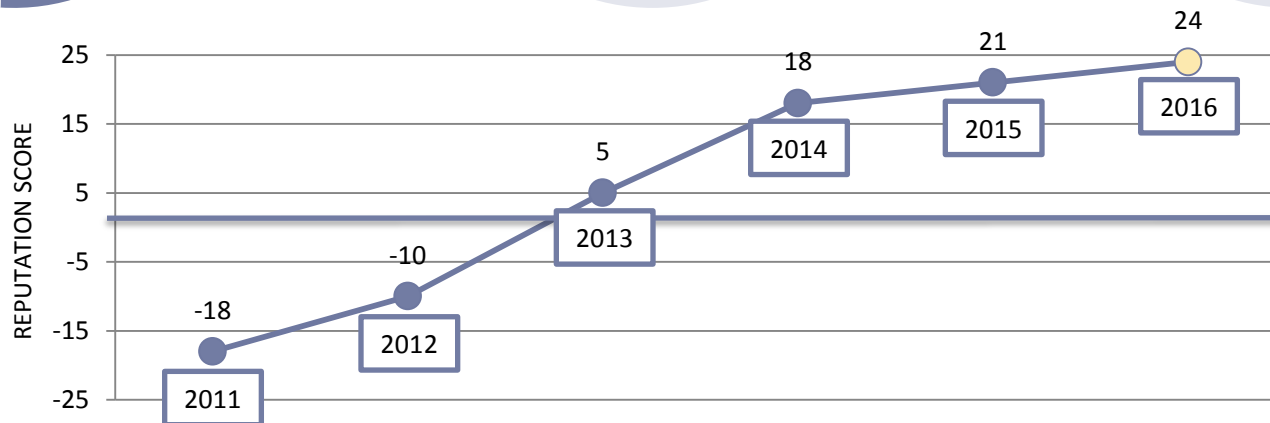
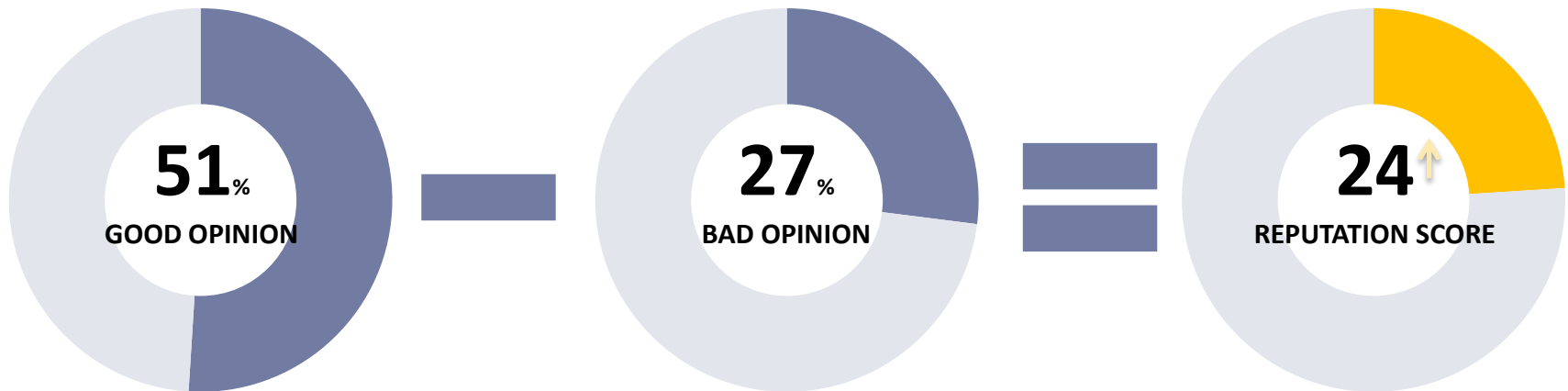


1. Reputation
2. Satisfaction
3. Hospital Usage
4. Attitudes and Perceptions
5. Familiarity and Views on Proposed Changes
6. The ONE Foundation

NIAGARA HEALTH'S REPUTATION CONTINUES TO RISE

Niagara Health's reputation score has been on the climb since tracking it began, and this year is no different. Half the residents surveyed this year (51%) have a good opinion of Niagara Health, while 27% have a bad opinion, generating a positive reputation score of +24. This is up three points over last year's score of +21. Those more likely to have a good opinion of Niagara Health include those who have been treated (or know someone who's been treated) by Niagara Health (53%), and those who are satisfied with Niagara Health's services (66%).

Niagara Health made no significant gains in overall awareness this year, however. Like last year, roughly two-in-ten (18%) lack enough familiarity with Niagara Health in order to form an opinion (2014: 19%).



QUALITY SERVICE AND CARE DRIVE POSITIVE OPINION

ALL RESPONDENTS (n=1001)

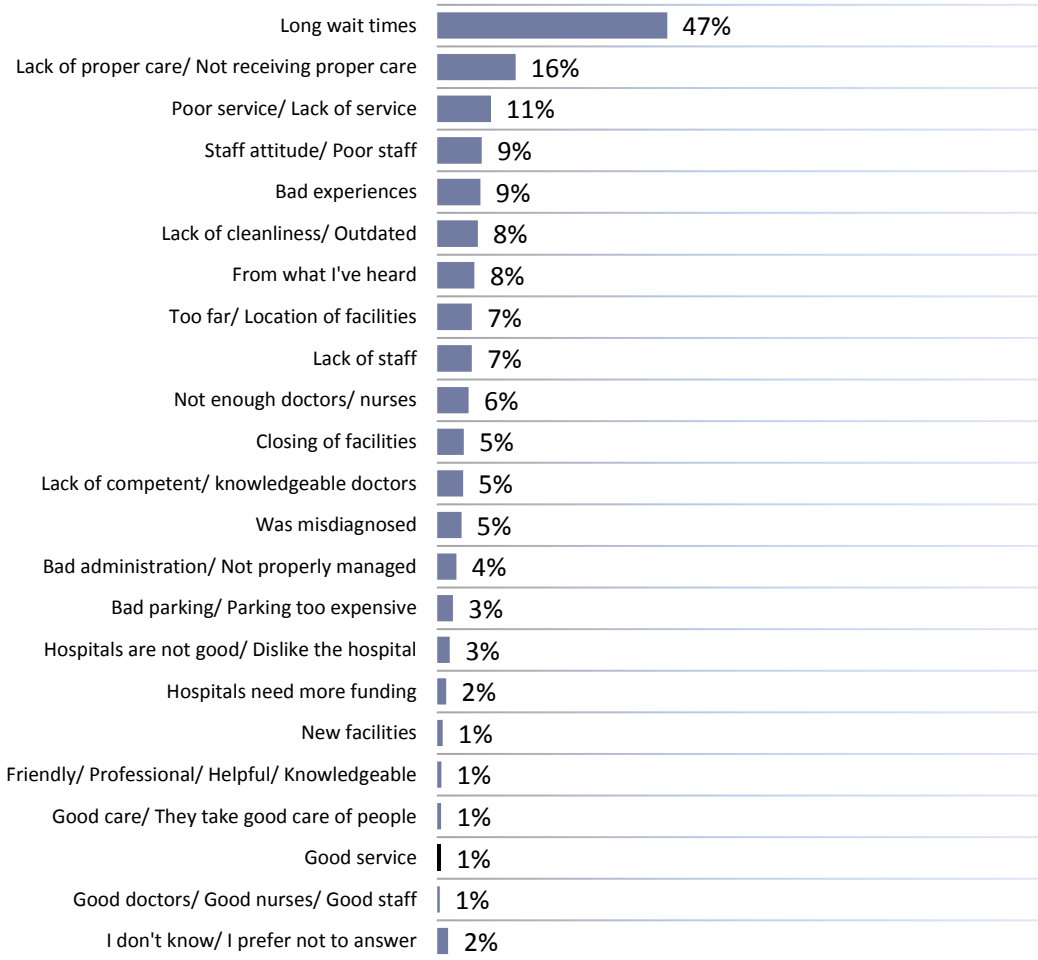
Good service	21%	41%
Good care/ They take good care of people	16%	
Satisfied/ Never had a problem	15%	
Quick/ fast/ timely service	13%	17%
Friendly/ Professional/ Helpful/ Knowledgeable	11%	
Good experiences	10%	
Been treated well/ Good treatment	9%	
Good doctors/ Good nurses/ Good staff	8%	
They do a good job/ They're good	7%	15%
Long wait times	5%	
Good things I've heard	3%	
Cleanliness	2%	
New facilities	2%	
Location/ Accessibility to facilities	2%	
I work there/ Know someone who works there	1%	
They are improving/ making improvements	1%	
Too far/ Location of facilities	1%	
I don't know/ I prefer not to answer	4%	

TOP THREE ANSWERS AMONG THOSE WHO HAVEN'T BEEN TREATED BY NIAGARA HEALTH (n=19)*

Positive opinions are largely driven by the quality of the service and care Niagara Health provides. Even among those who have never been treated by Niagara Health, good service ranks well above any other reason given (41%).

Answers mentioned by less than 1% of the respondents are not shown above.

BAD OPINIONS ARE FUELED BY LONG WAIT TIMES



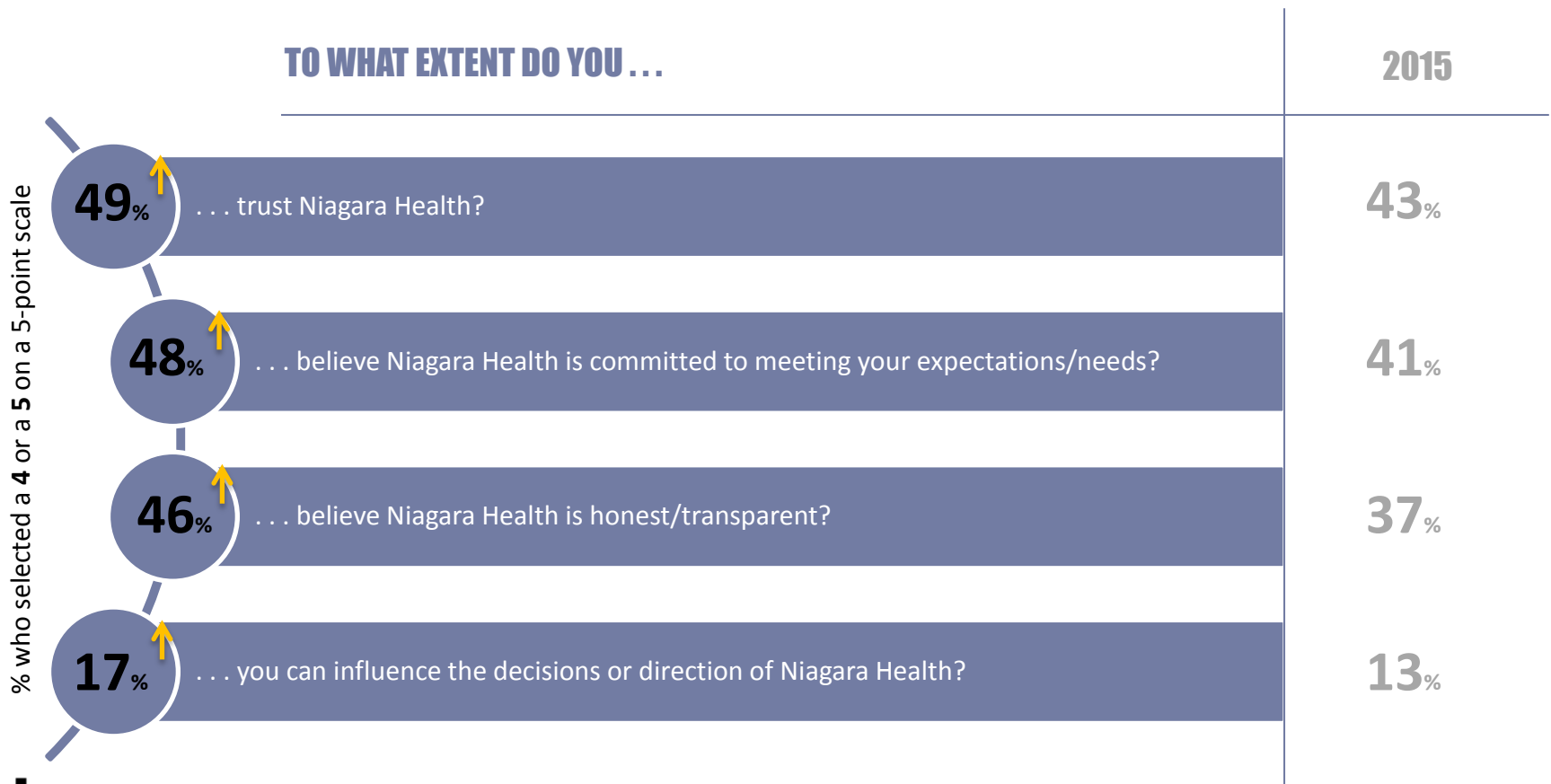
Answers mentioned by less than 1% of the respondents are not shown above.

As in previous years, long wait times tops list of reasons why some residents have a bad opinion of Niagara Health. Other reasons include poor care and poor service

THERE HAVE BEEN GAINS ON ALL FOUR RELATIONSHIP MEASURES

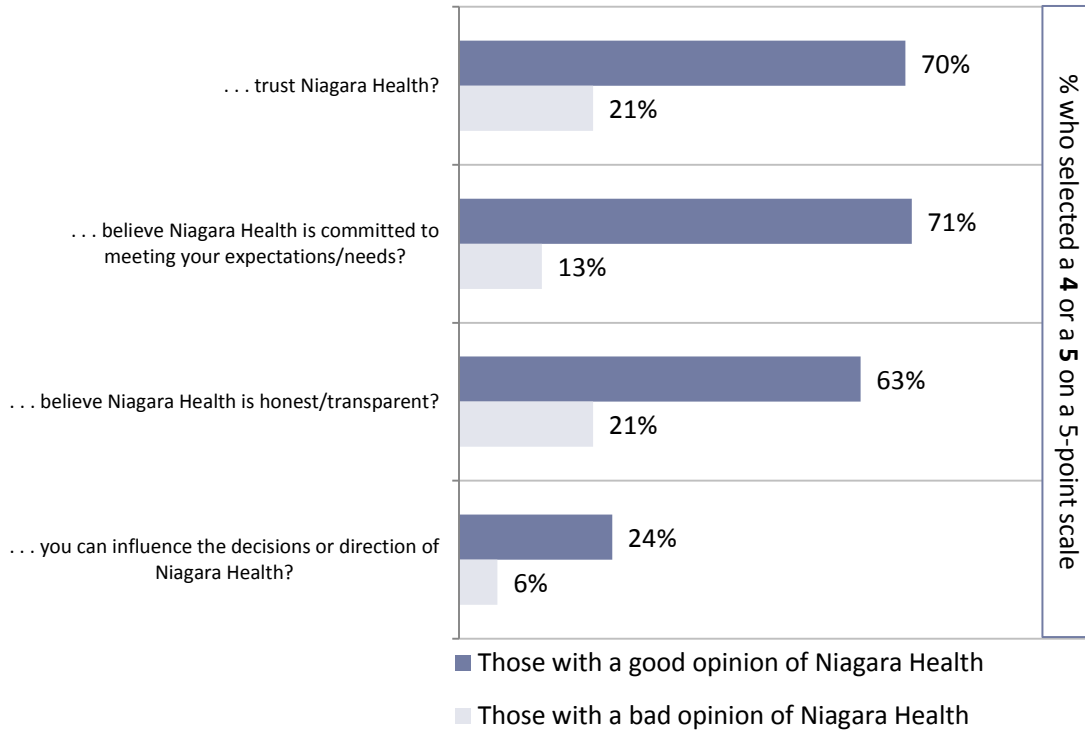
Any relationship, be it between two people or between an individual and a health system, is complex and multi-faceted. In order for it to be successful, it must be built upon a solid foundation of such things as trust, commitment, and transparency. To that end, Niagara residents ranked Niagara Health on four metrics (Trust, Commitment, Transparency, and Influence), using a 5-point scale.

Niagara Health scored statistically higher on each measure this year over last, seeing the most gains in perceived transparency (a 9% increase). Not only is Niagara Health seen as more transparent than last year, it's also seen as more trustworthy, more committed, and more open to the opinions comments of the region's residents.



RELATIONSHIP SCORES ARE INFLUENCED BY OVERALL OPINION

TO WHAT EXTENT DO YOU ...



There is, of course, a strong relationship between an entity's reputation score and its performance on the four relationship measures. As the chart to the left suggests, those who have a good opinion of Niagara Health tend to rate it significantly higher across the board.

Detailed Results

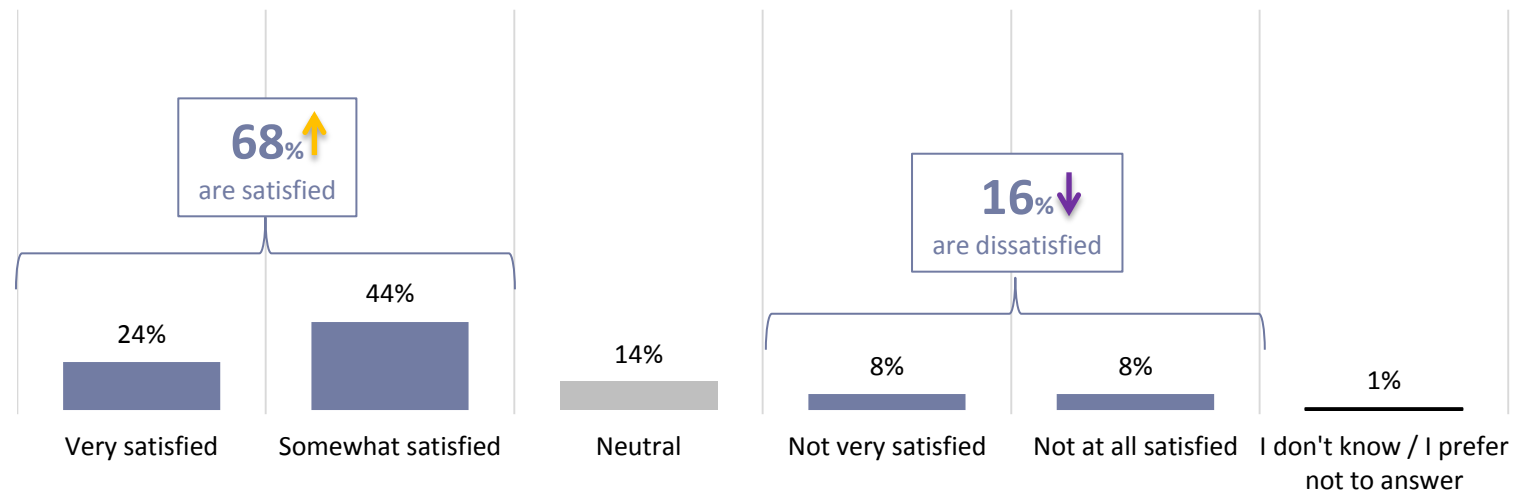


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SATISFACTION WITH SERVICES REACHES A NEW HIGH

Roughly seven-in-ten residents (68%) are satisfied with the services offered by Niagara Health, a quarter of whom (24%) are *very* satisfied. This is a five per cent increase over last year. Statistically, those 75+ are much more likely to be satisfied (78% vs. those 35-74: 67%).

SATISFACTION WITH SERVICES



2015

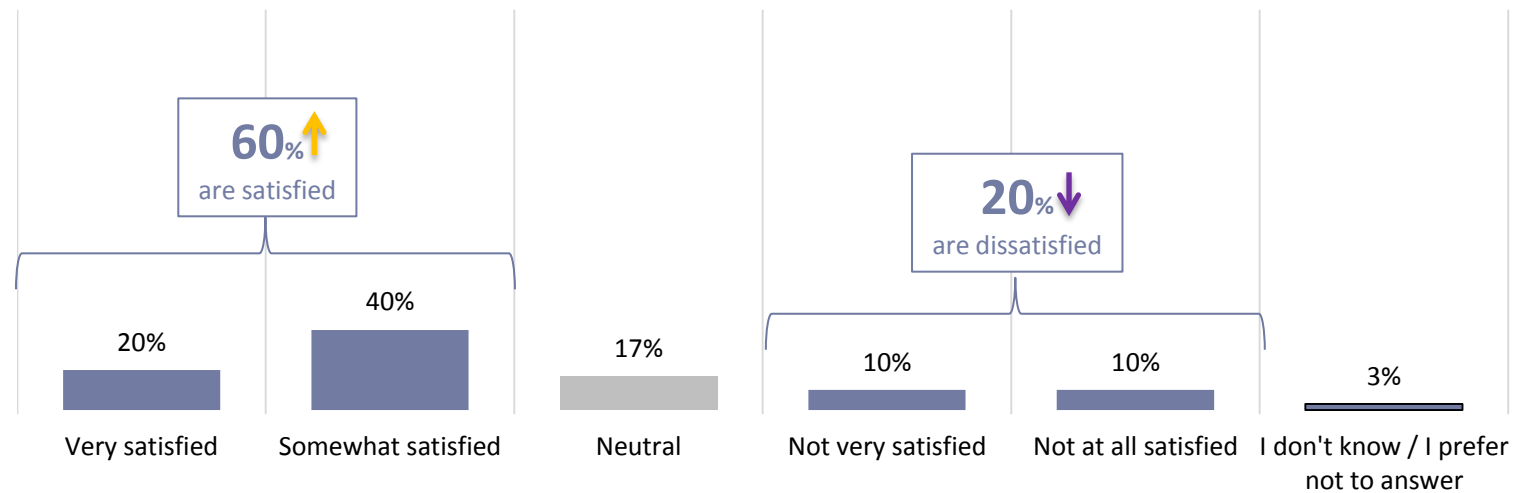
63%
were satisfied

20%
were dissatisfied

NIAGARA HEALTH IS OPERATING WELL, SAY MOST RESIDENTS

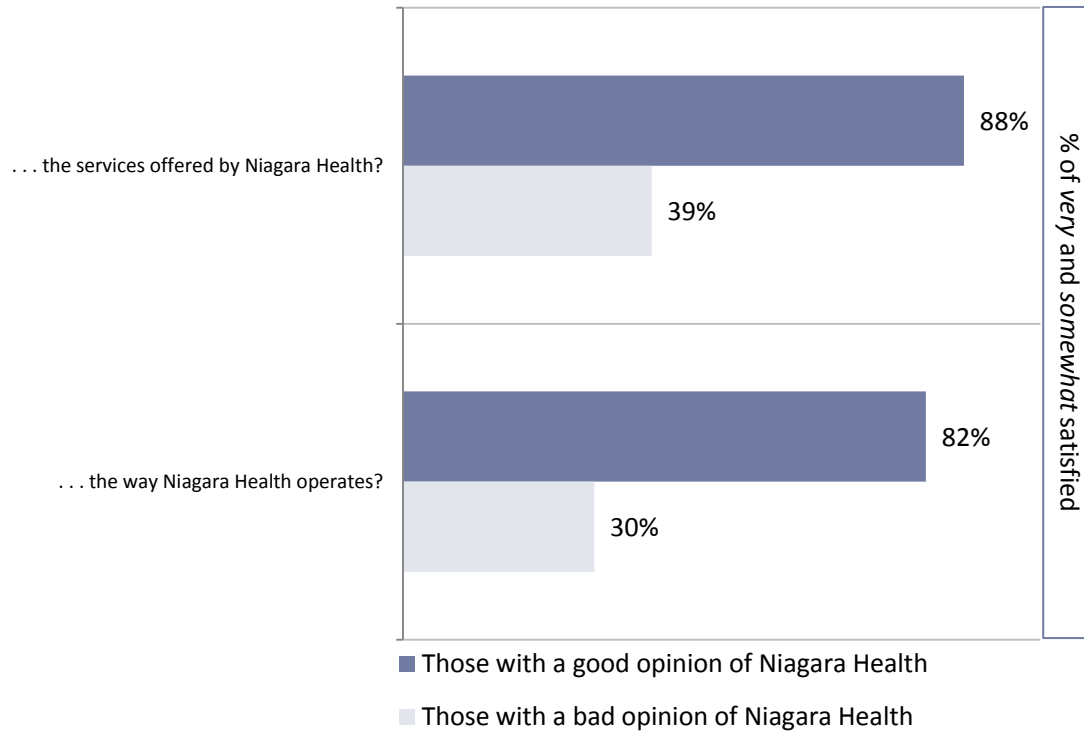
Six-in-ten are satisfied with the way Niagara Health operates, with 20% stating they are very satisfied. This is a six per cent increase over last year. Not surprisingly, those already satisfied with the services provided by Niagara Health are far more likely to be satisfied with the way it operates (82% vs. 7% among those who are dissatisfied).

SATISFACTION WITH THE WAY NIAGARA HEALTH OPERATES



SATISFACTION LEVELS ARE INFLUENCED BY OVERALL OPINION

HOW SATISFIED ARE YOU WITH...



There is a strong relationship between a respondent's overall opinion of Niagara Health and his or her satisfaction levels. As the chart to the left suggests, those who have a good opinion of Niagara Health tend to be much more satisfied, overall.

Detailed Results



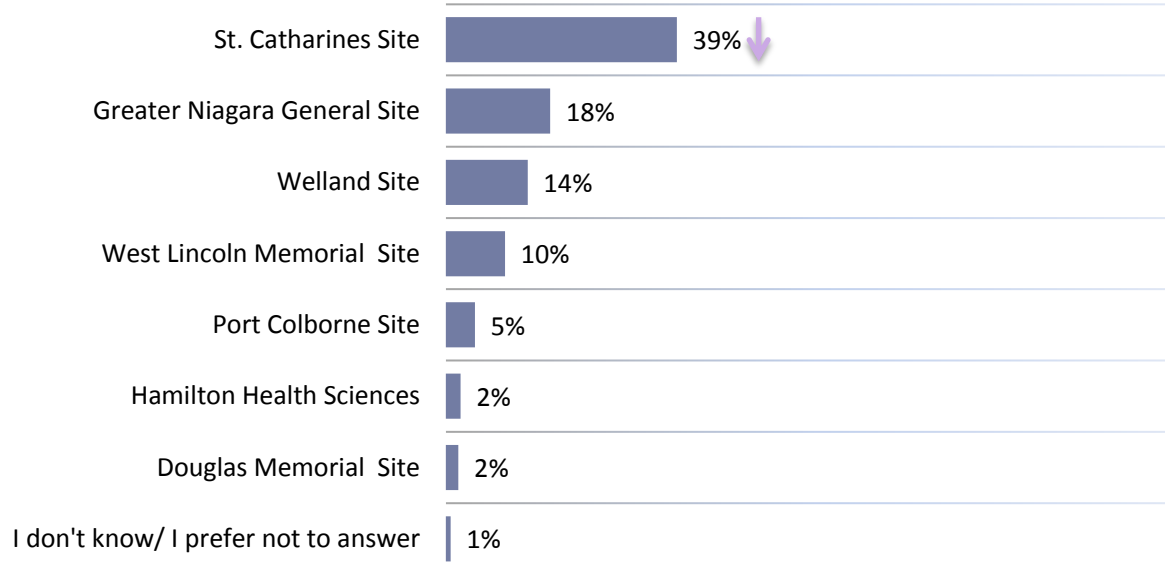
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THE ST. CATHARINES SITE HAS BEEN VISITED THE MOST

Visits to the St. Catharines General Site have levelled off this year (39% vs. 44% in 2015, 40% in 2014, and 29% in 2013).

THE MOST FREQUENTLY VISITED SITES

among those who have gone to a hospital in the past 12 months



Hospitals mentioned by less than 1% of the respondents are not shown above.

Detailed Results



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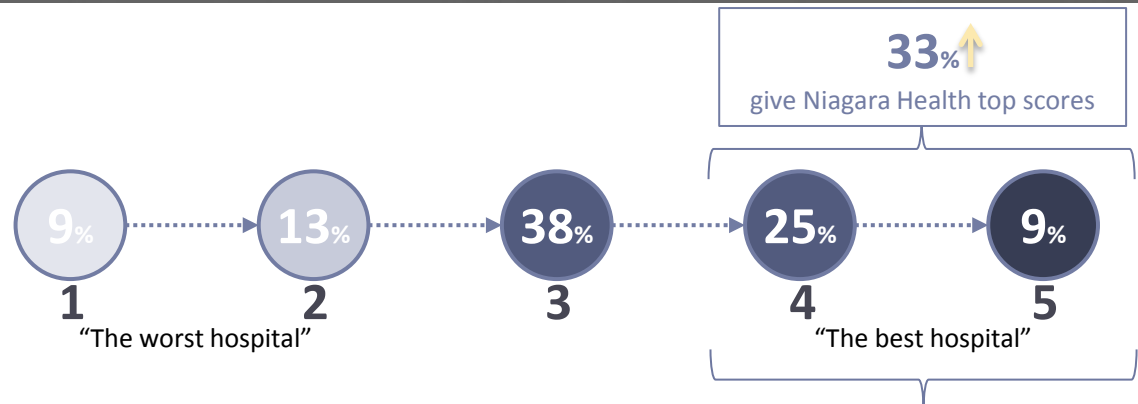
THREE-IN-TEN SAY NIAGARA HEALTH IS THE BEST HOSPITAL

Three-in-ten consider Niagara Health to be “the best hospital,” rating it either a 4 or a 5 on a 5-point scale. This continues a trend of successively higher ratings on this measure since 2014. When asked what makes Niagara Health the best hospital, these residents cited Niagara Health’s highly skilled, professional, courteous, and caring staff far more frequently than anything else. This has been the trend since 2013.

Residents more likely to have give Niagara Health top scores, include those:

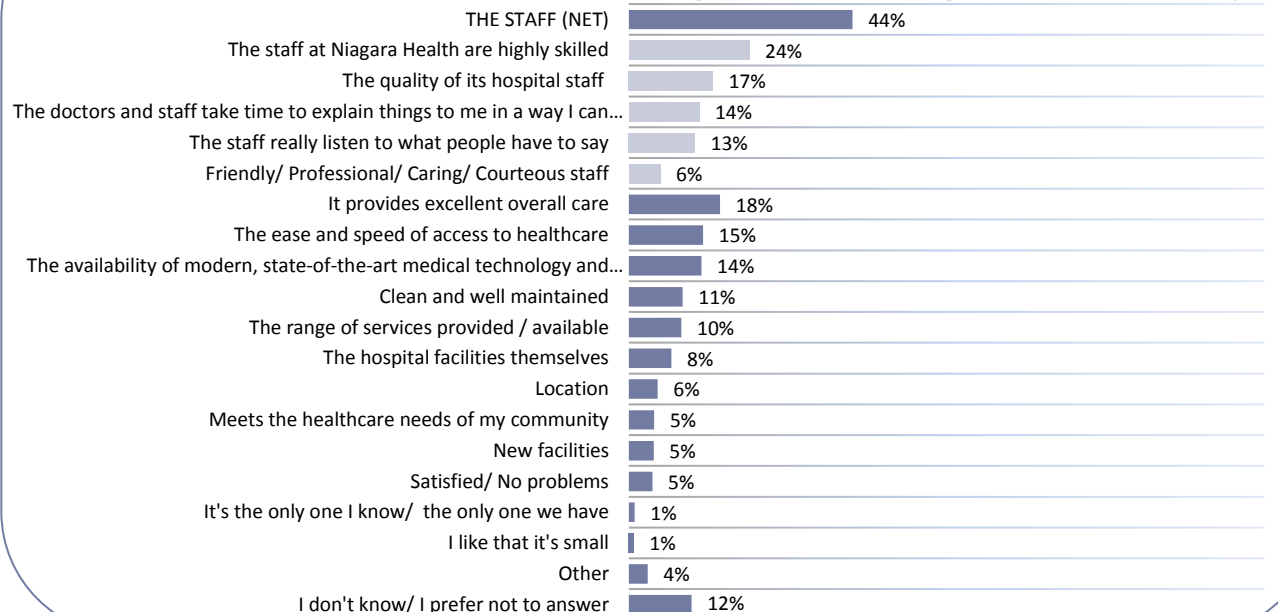
- 75+ (50%),
- already satisfied with Niagara Health services (44%), and those
- with a good opinion of Niagara Health to begin with (51%).

It is important to note here that those 75+ were also more likely to be unsure and forgo a rating (20% vs. 6% among those under 75 years of age).

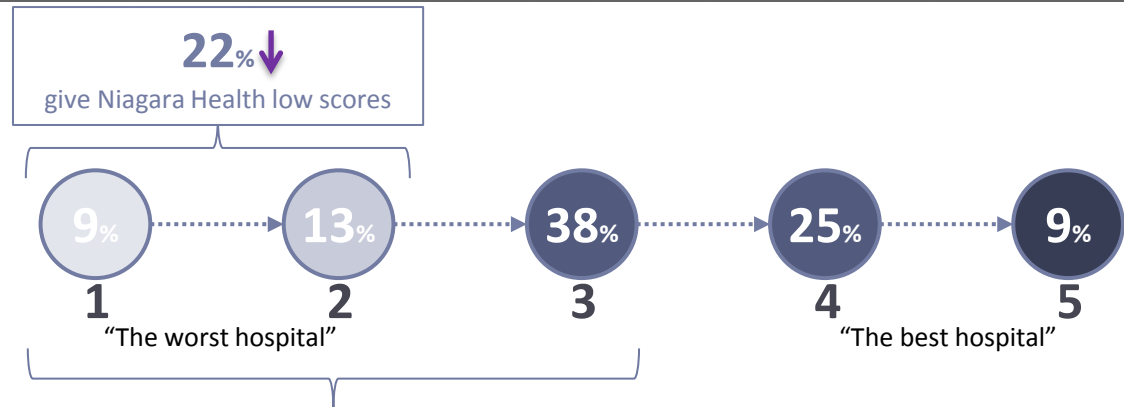


THE TOP REASONS GIVEN

among those who rated Niagara Health “the best hospital”

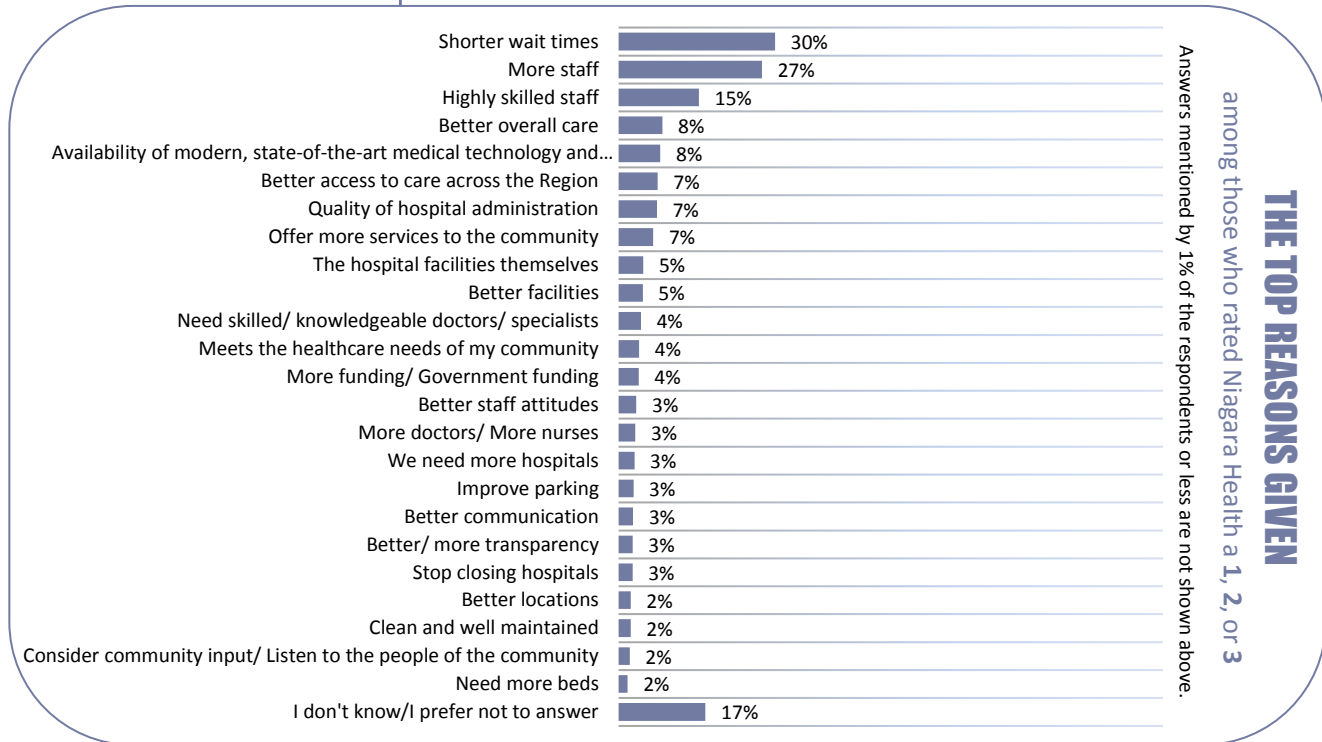


LONG WAIT TIMES FACTOR INTO RESIDENTS' LOW RATINGS



The percentage of Niagara residents who rate Niagara Health poorly has decreased since last year (22% vs. 27% in 2015). In fact, this percentage is at its lowest point since tracking began in 2013.

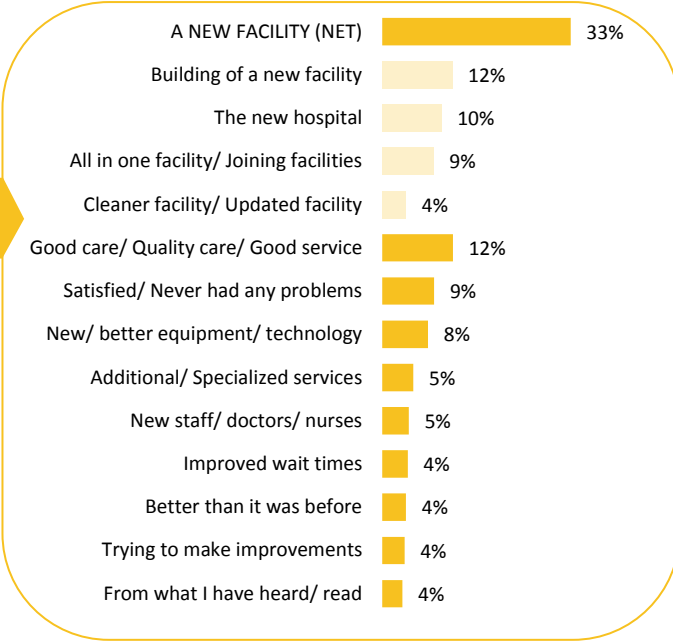
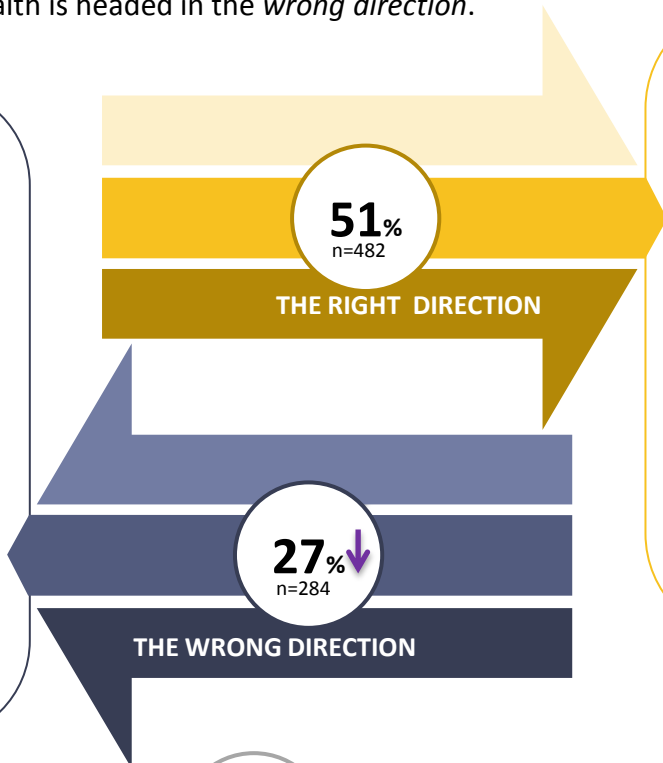
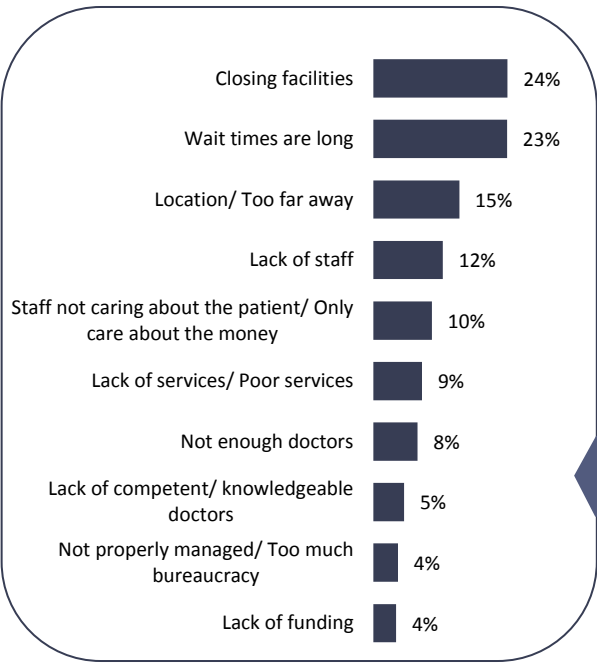
Among residents who rated Niagara Health neutrally (a 3) or poorly (a 1 or a 2) shorter wait times, more staff, and highly skilled staff round out their top three recommendations. These same recommendations topped the list last year, as well as in 2014.



MOVING IN THE RIGHT DIRECTION

As in past years, roughly half the residents surveyed believe Niagara Health is moving in the right direction (51%). This is especially true among those who are satisfied with the services provided by Niagara Health (62%), and those with a good opinion of it (71%). On the flipside, significantly fewer residents believe Niagara Health is moving in the wrong direction this year (27%) -- a percentage that is lower than any other year on record.

The new facility in St. Catharines has certainly helped some residents believe Niagara Health is moving in the *right direction*, as does Niagara Health's level of service. On the other hand, facility closures, long wait times, and facility location are among the main reasons why some residents believe Niagara Health is headed in the *wrong direction*.

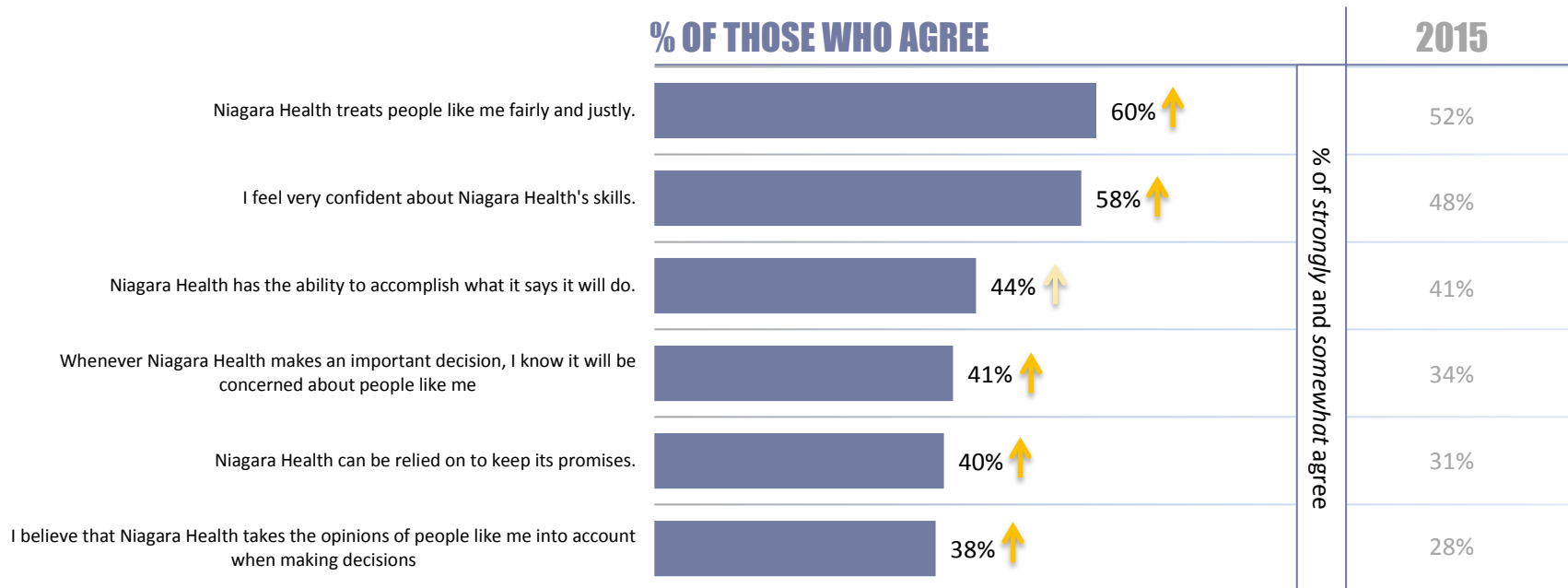


LEVELS OF AGREEMENT HAVE ALL INCREASED SINCE 2015

Levels of agreement for each of the statements relating to Niagara Health have risen since last year. In fact, all except one (“Niagara Health has the ability to accomplish what it says it will do”) have increased significantly since 2015. Two statements in particular have seen an increase of 10 percentage points:

1. “I believe that Niagara Health takes the opinions of people like me into account when making decisions”; and
2. “I feel very confident about Niagara Health’s skills”.

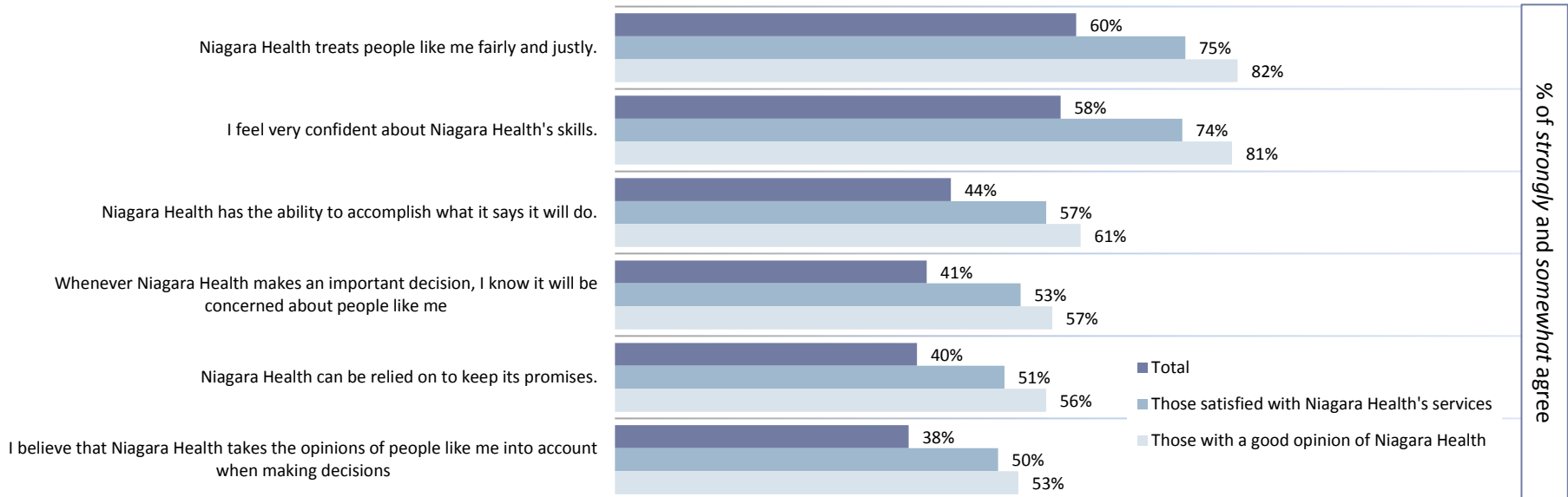
Interestingly, residents aged 75+ are statistically more likely to agree with nearly every one of these statements, relative to those 55-74 (i.e. all except the statement relating to their level of confidence in Niagara Health’s skills).



RESIDENTS' OPINION OF AND SATISFACTION WITH NIAGARA HEALTH HELP BOOST AGREEMENT LEVELS

Not surprisingly, those satisfied with Niagara Health's services, as well as those with a good opinion of Niagara Health, show significantly higher levels of agreement for each statement.

% OF THOSE WHO AGREE



Detailed Results



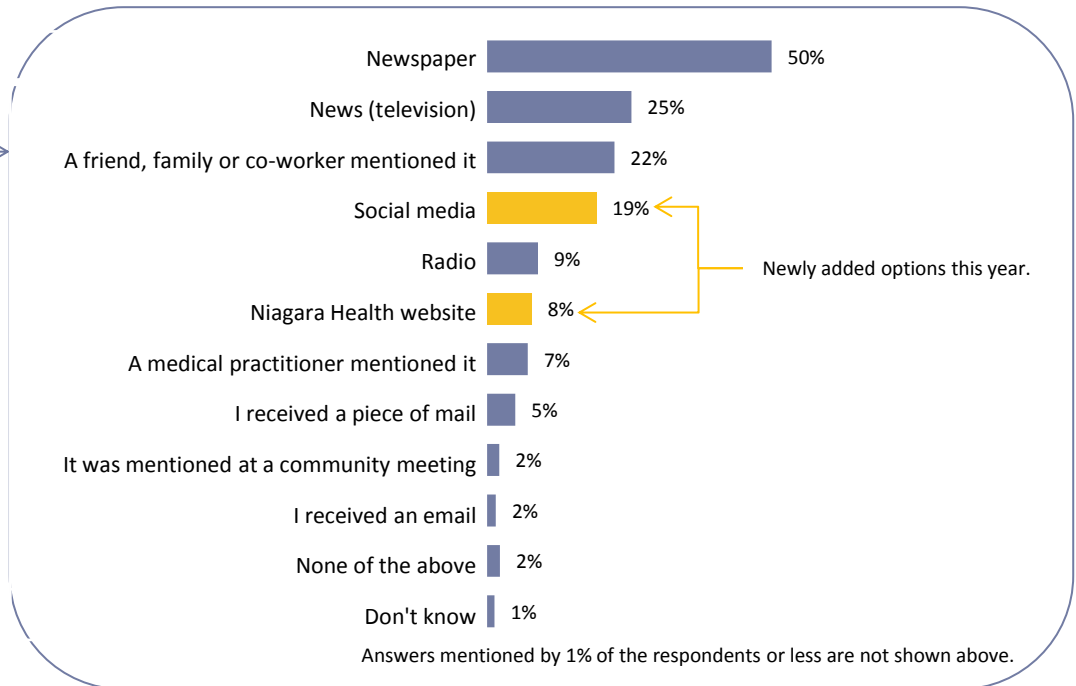
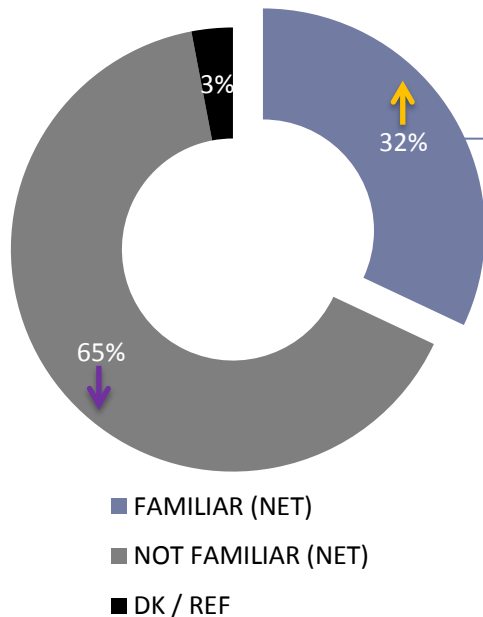
1. Reputation
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MORE RESIDENTS ARE FAMILIAR WITH THE PROPOSED CHANGES

Three-in-ten residents (32%) are familiar with the proposed changes to the way Niagara Health provides care across the region, which is up significantly since last year (2015: 27%). Familiarity is higher among those: who have been treated by Niagara Health in the past (35%), who know someone who has been treated by Niagara Health in the past (34%), those *dissatisfied* with Niagara Health's services (45% vs. 31% among those who are *satisfied*), and those with a *bad opinion* of Niagara Health (41% vs. 31% among those with a *good opinion*).

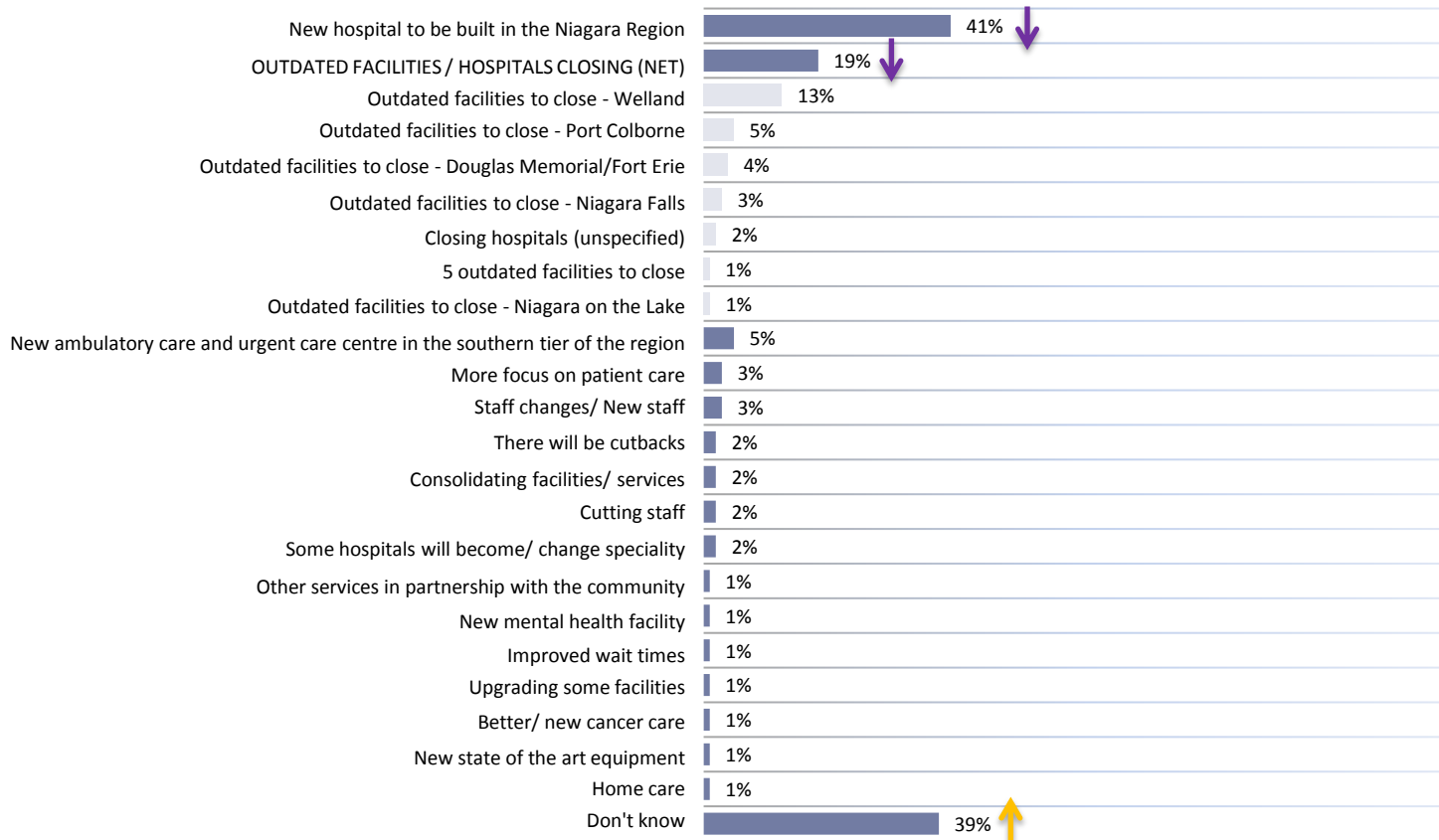
Like last year, residents have learned about these proposed changes from newspapers, television, family members, friends, and co-workers more frequently than anywhere else, though these percentages have all declined with addition of two new options this year: social media (19%) and the Niagara Health website (8%). Interestingly:

- the likelihood of someone having heard of these changes from a newspaper steadily increases with age.
- those 75+ are far *less likely* to have heard about the changes through social media (3%), relative to those 18-54 (25%).



SIGNIFICANTLY FEWER KNOW THE SPECIFICS THIS YEAR

Among those familiar with the proposed changes, four-in-ten (39%) could not mention anything specific, a significant jump over last year (2015: 24%). A similar proportion (41%) knows of the new hospital to be built in Niagara (though this is down from 53% a year earlier), while significantly fewer this year (19%) mentioned outdated hospitals set to close as a result (vs. 31% in 2015).



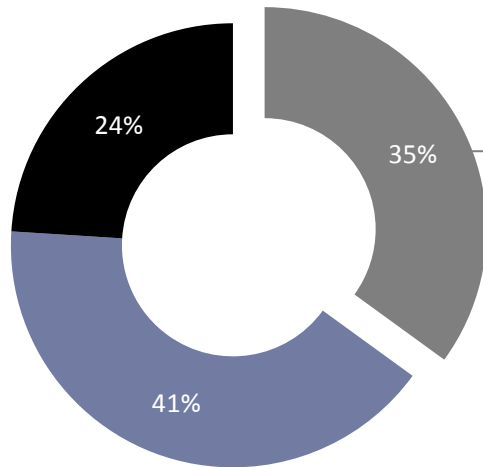
Answers mentioned by less than 1% of the respondents are not shown above.

FOUR-IN-TEN ARE SATISFIED WITH THE PROPOSED CHANGES

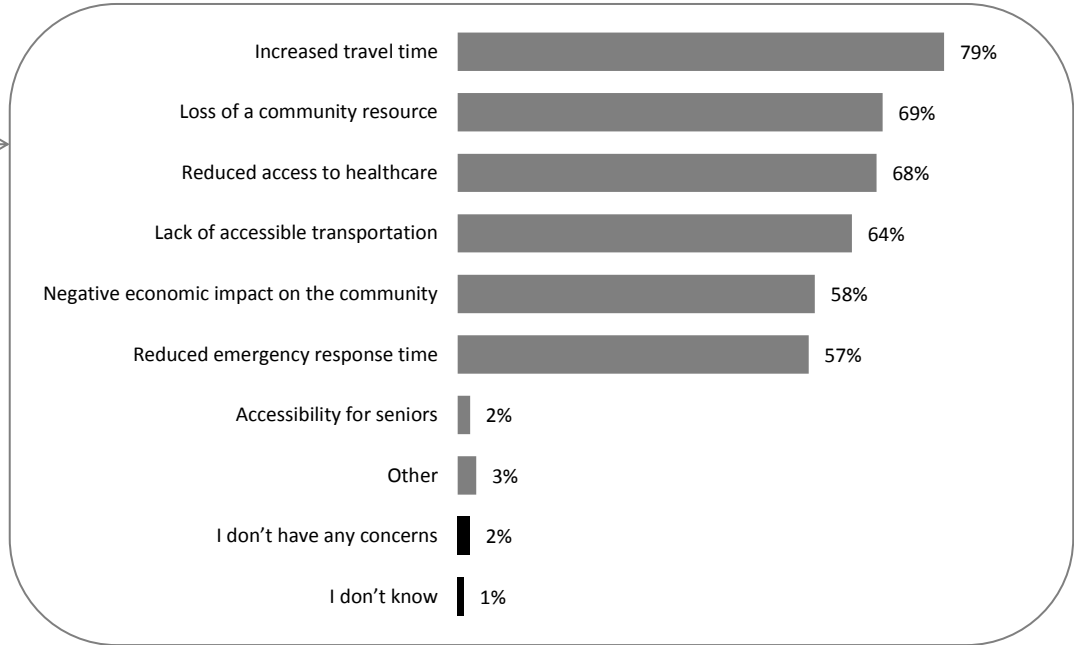
Among those familiar with Niagara Health’s proposed changes, four-in-ten (41%) indicate they are satisfied with them, one-in-ten of whom (11%) are *very satisfied*. Residents more likely to be satisfied, include those who:

- have a good opinion of Niagara Health (51% vs. 23% among those with a bad opinion), as well as those
- who are satisfied with the services provided Niagara Health (49% vs. 18% who are dissatisfied).

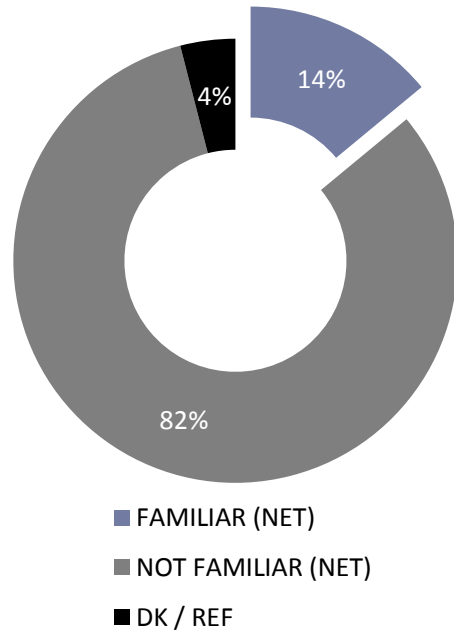
Among those who are *not satisfied* (35%), increased travel time tops the list of concerns (79%), followed by concerns over the loss of a community resource, reduced access to healthcare, and a lack accessible transportation, among others.



- NOT SATISFIED (NET)
- SATISFIED (NET)
- DK / REF



LEVELS OF AWARENESS FOR THE NEW STRATEGIC PLAN ARE LOW



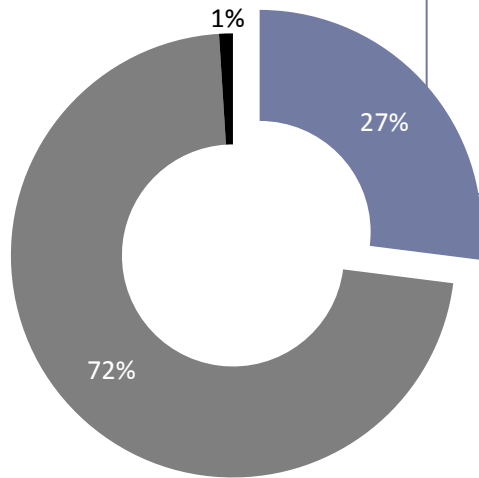
Relatively few (14%) are familiar with Niagara Health's recently launched strategic plan. Awareness is higher among those who have been treated by Niagara Health in the past (15%), or who know someone who has been treated by Niagara Health in the past (15%), when compared to those who have not (6%).

Detailed Results

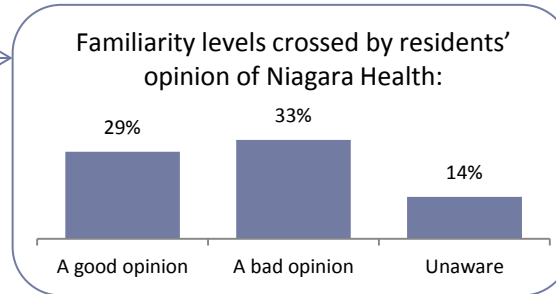
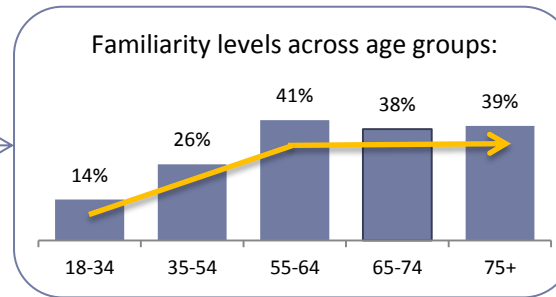


1. Reputation
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FAMILIARITY WITH THE ONE FOUNDATION IS TIED TO AGE AND PAST TREATMENT EXPERIENCES WITH NIAGARA HEALTH



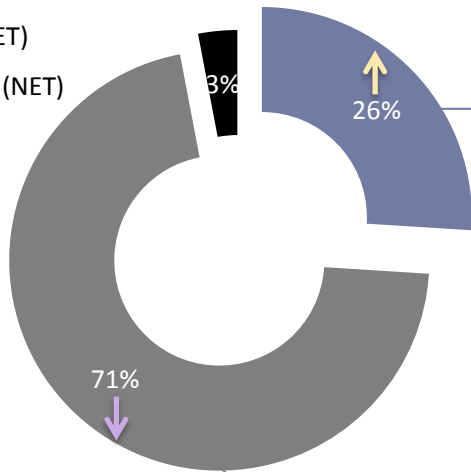
- FAMILIAR (NET)
- NOT FAMILIAR (NET)
- DK / REF



Familiarity with Niagara Health's ONE Foundation has remained virtually unchanged since last year. Levels of familiarity tend to increase with age up until the 55-64 age range, where they plateau at around 40%. In fact, those 55+ are twice as likely to be familiar with the ONE Foundation than their younger counterparts (40% vs. 21%, respectively). Others more likely to be familiar with the ONE Foundation include those who have been treated by Niagara Health in the past (28% vs. 13% among those who have not), as well as those with an opinion of Niagara Health, good or bad.

A QUARTER WILL LIKELY DONATE TO NIAGARA HEALTH

■ LIKELY (NET)
 ■ UNLIKELY (NET)
 ■ DK / REF



Like last year, most Niagara residents state that they are *unlikely* to donate to Niagara Health in the next year (71% vs. 75%). Reasons for not doing so are similar to last year, with one-in-ten saying he or she donates to another organization. Significantly more respondents this year state that there are other causes more important to them (13% vs. 9% in 2015).

Among those *likely* to donate this year (26%), the percentage of respondents citing a good experience at the hospital as a reason has shot up from 12% to 20%. The same is true among those who believe hospitals don't get enough funding (20% vs. 2015: 12%). Those more likely to donate include: those who have been treated, or know someone who has been treated, by Niagara Health (27%); those satisfied with the services provided by Niagara Health (32%); and those with a good opinion of Niagara Health (33%).

I currently give to another organization 16%

Other causes are more important to me 13% ↑

Hospitals already get enough money from the government 11%

Bad experience at the hospital 9%

I did not realize I could donate to the hospital 4%

Other 63%

Don't know/prefer not to answer 4%

I was cared for at the hospital 22%

I had a good experience at the hospital 20% ↑

I don't think that hospitals get enough funding 20% ↑

My friend/ family member was cared for at the hospital 16%

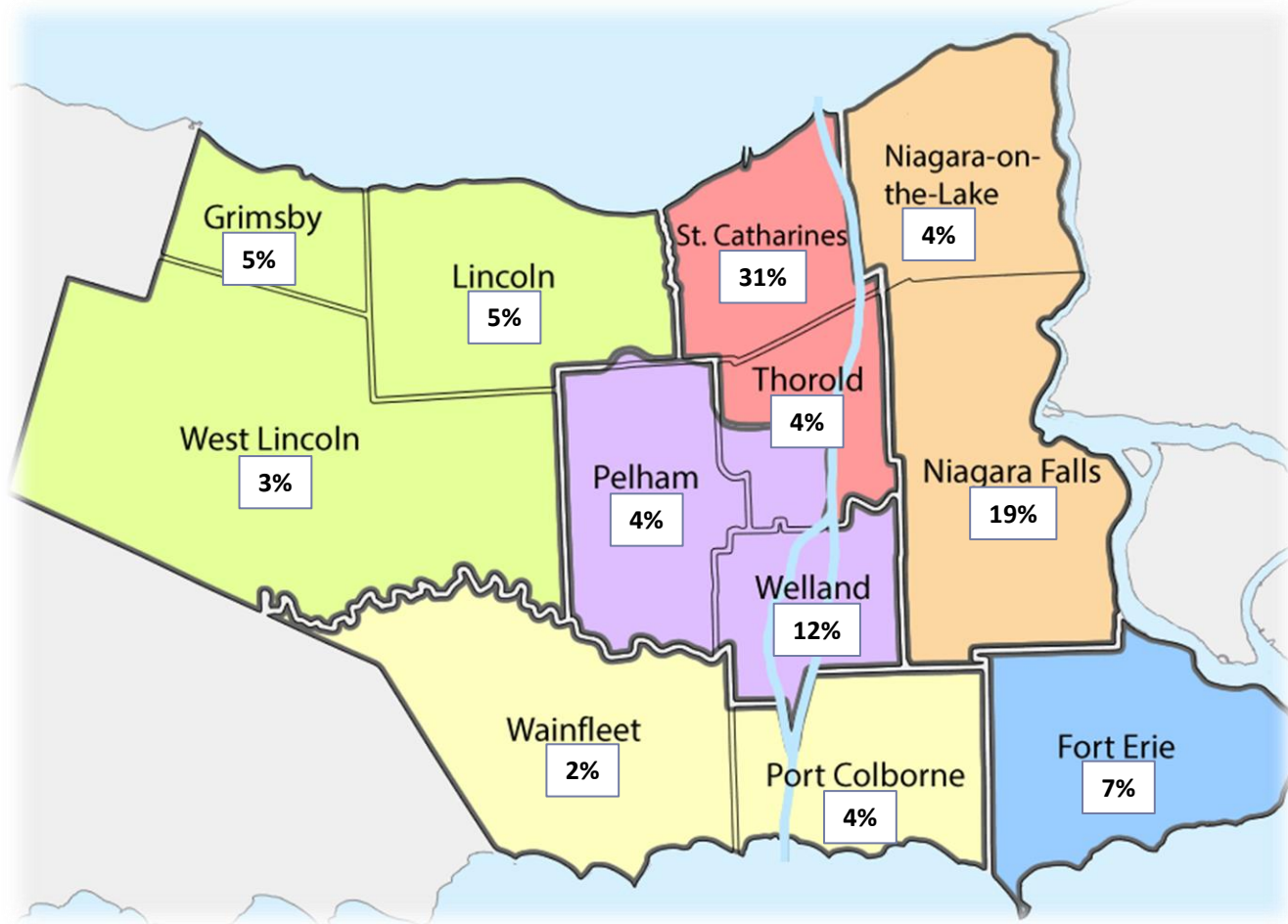
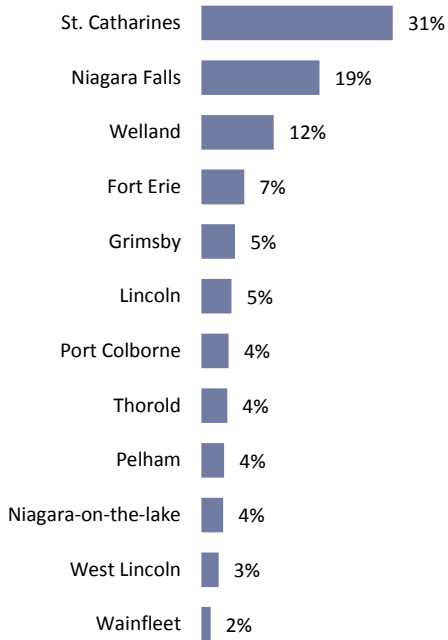
Closeness with a certain department/ staff member(s) 6%

Other 54%

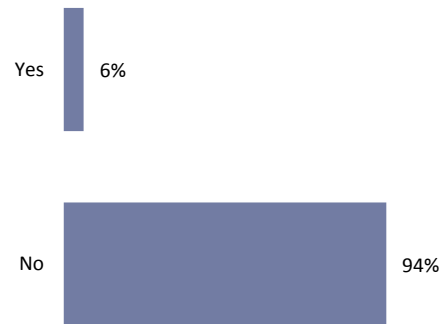
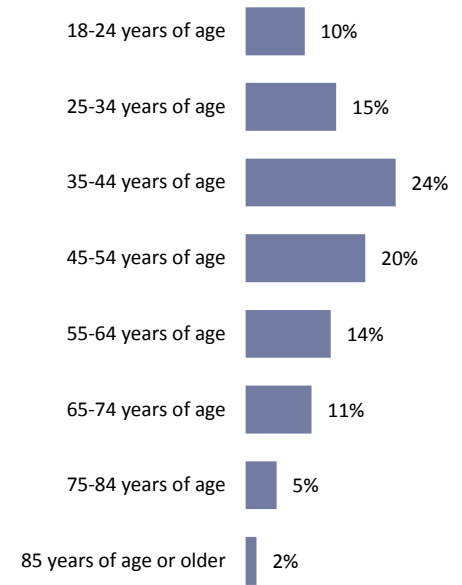
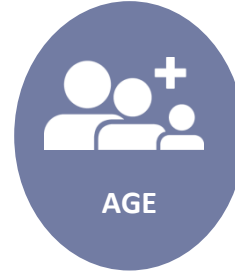
Don't know/prefer not to answer 3%

Profile of Respondents

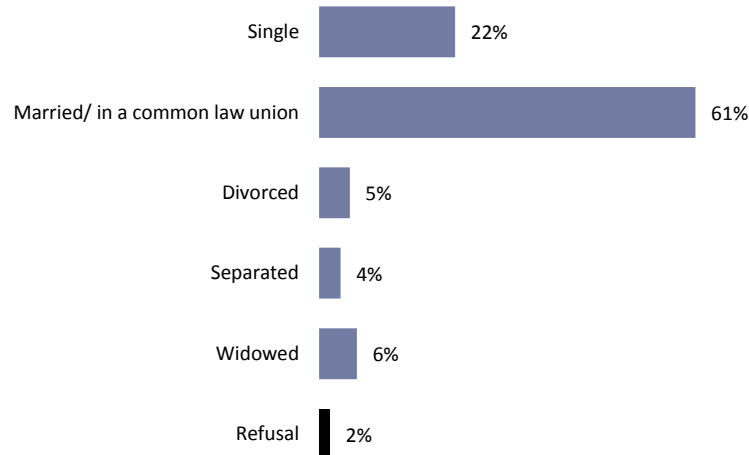
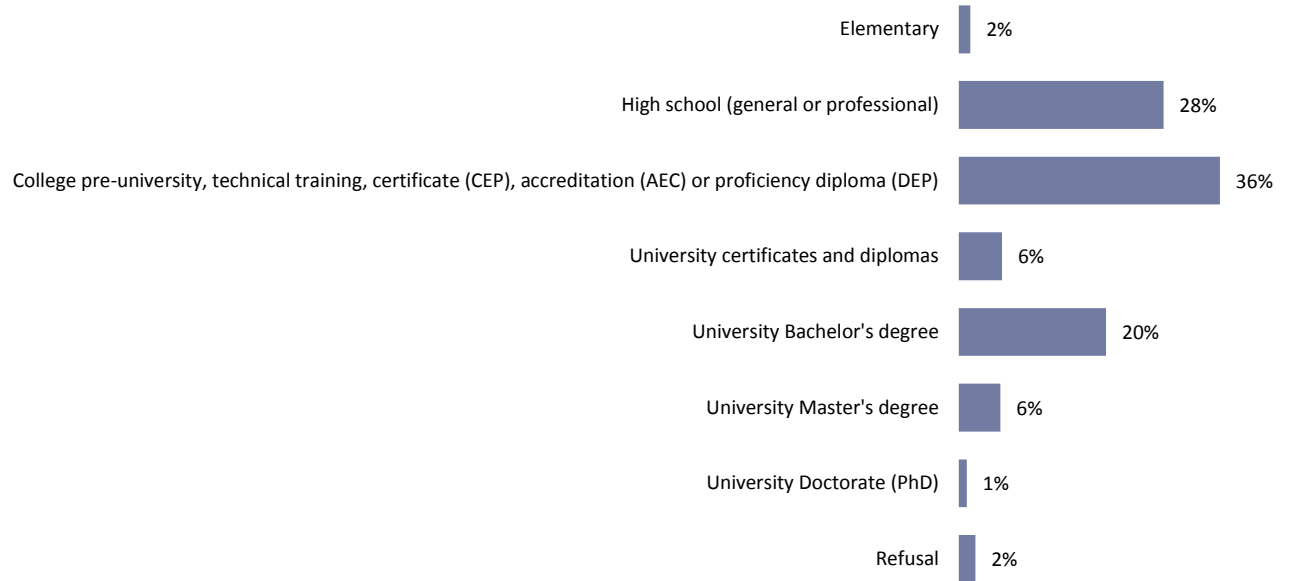
RESPONDENT PROFILE



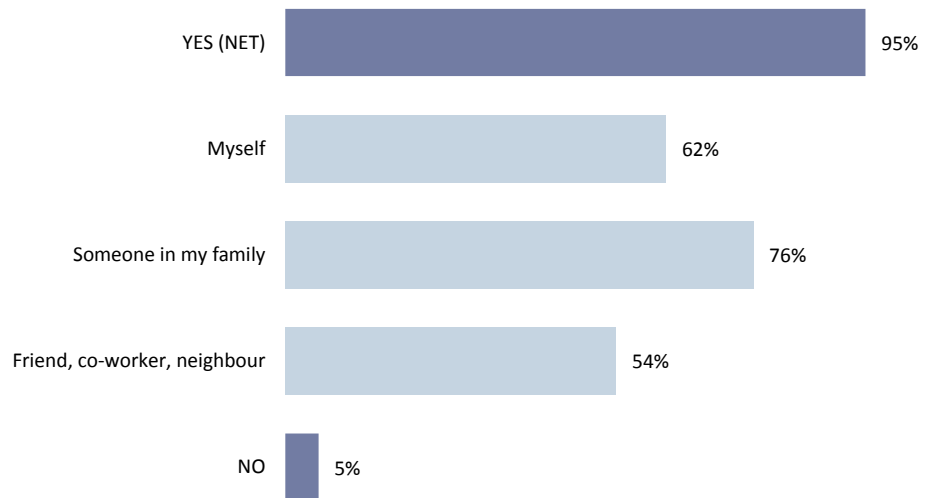
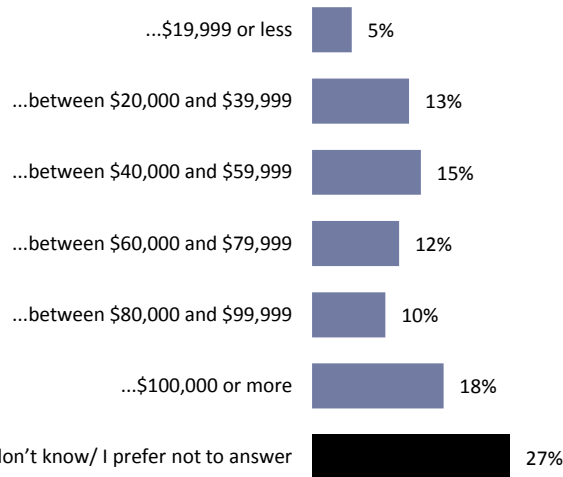
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