

Niagara Health System

-2015 Survey-
September 29th, 2015



Niagara Health System
Système De Santé De Niagara

Leger

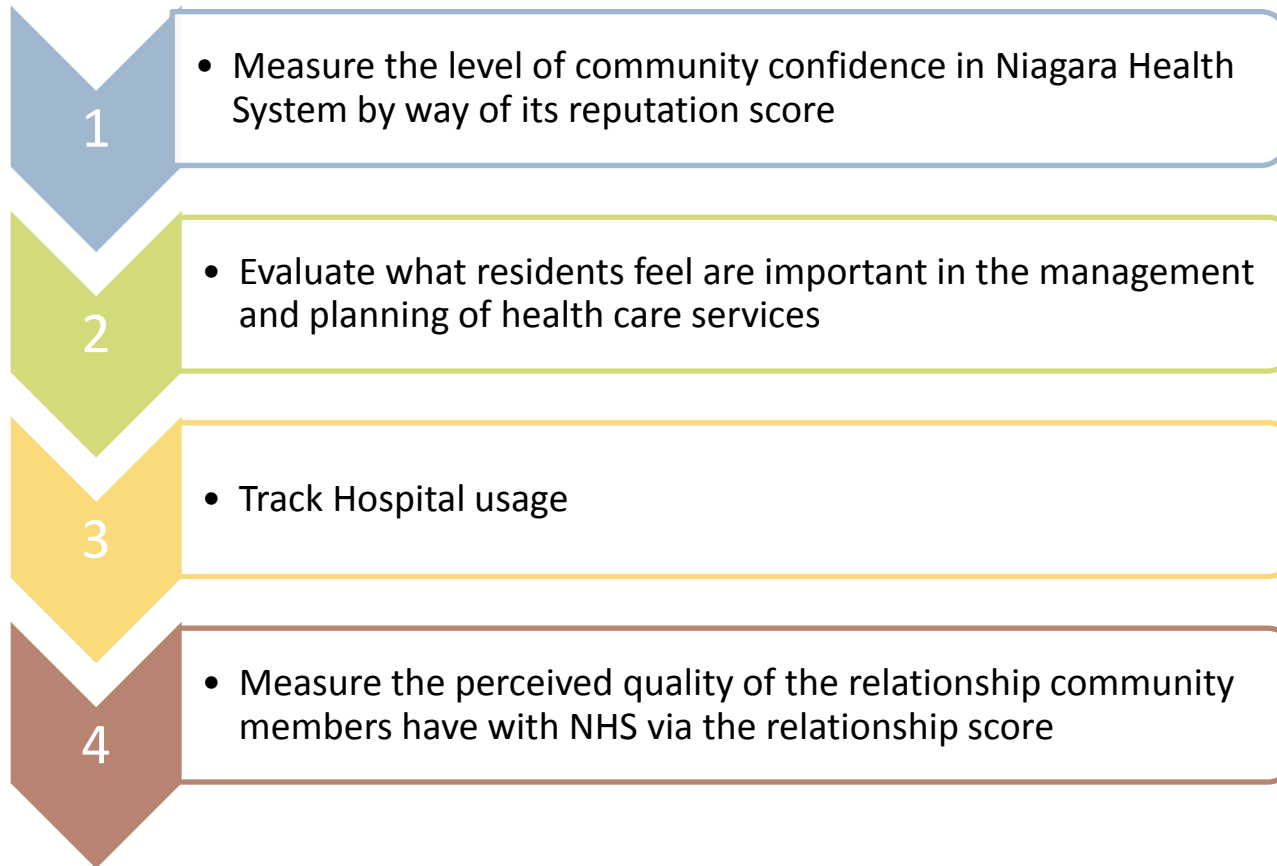
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THE RESEARCH INTELLIGENCE GROUP

Context and Objectives

The purpose of this study was to gauge the level of familiarity, attitudes and perceptions of Niagara Health System among Niagara residents as well as compare with results from previous years.

Specifically:



QUANTITATIVE RESEARCH

INSTRUMENT

A survey of 1000 Canadians living in the Niagara region completed via telephone between August 11th to September 1st, 2015.

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

A probability sample of the same size would yield a margin of error of +/- 3.1%, 19 times out of 20.



Key Insights

Key Insights

1

Niagara Health System's Reputation Score continues to trend upwards.

- One-half of residents in the NHS catchment area have a good opinion of the NHS (49%).
- Good opinions continue to be driven by good care, timely/quick service, overall good experiences and the staff at the NHS.
- The largest driver of bad opinions continues to be as a result of long wait times. Unsurprisingly when asked how residents would improve the NHS – shorter wait times received the highest mentions.

2

Encouragingly, one-half of respondents feel that the NHS is moving in the right direction (49%) in comparison to one-third believing it is moving in the wrong direction (32%).

- The changes to the system are polarizing. Among those believing it is moving in the right direction the top reason is the building of new facilities (30%) and among those believing it is in the wrong direction the top reason is the closing of facilities (28%).
- Still the level of understanding, or familiarity, with the changes is low. Only 26% of residents consider themselves to be somewhat/very familiar with the changes occurring at the NHS.

3

Familiarity with the ONE Foundation is low.

- Only one-quarter of NHS catchment area residents are somewhat/very familiar with the ONE Foundation (26%).
- The donation landscape is competitive; only 23% of NHS area residents say that they are somewhat/very likely to donate to the NHS in the next year (only 6% say that they are very likely) and the top reasons for this is that other organizations are a higher priority.
- It is worth noting that among those who show no/low intention to donate in the next year, a small portion said that they were unaware that donations could be made to NHS (3%).

4

Keep talking with the public and communicating to the public that you are listening.

- Times of transition can be polarizing for the public. The data continues to highlight that many residents do not feel that the NHS is actively listening for example only 28% agree that they believe that the NHS takes the opinions of people like me into account when making decisions.
- Much like in any relationship, whether between two people or a person and their health system both parties, want to feel heard. It is critical that NHS continue to voice that it is actively participating in conversations with the public throughout the planning, implementation and follow-through and actively using those conversations in the process.

Detailed Results

Attitudes Towards NHS

Close to half of residents in the communities served by the Niagara Health System have a good opinion of the NHS, generating a positive reputation score of +21 (up 3 points since 2014).

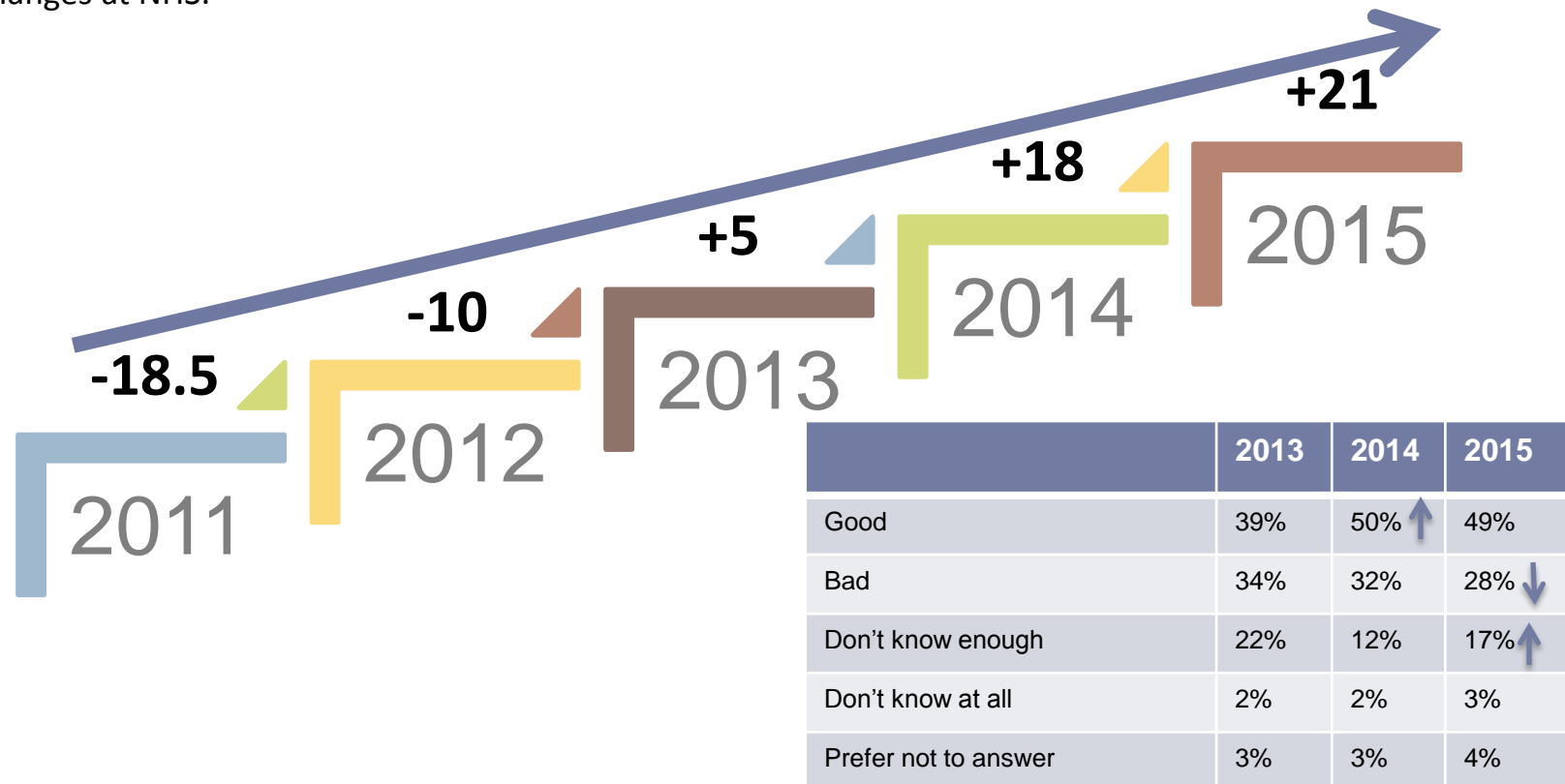
It is important to note that twenty percent of residents in the catchment area do not have any opinion of the NHS due to low familiarity and/or a lack of awareness altogether.



17% don't know the organization well enough to have an opinion and an additional 3% don't know Niagara Health System at all

Attitudes Towards NHS

Niagara Health System's corporate reputation score continues to trend upwards rising from +5 in 2013 to +18 in 2014 to +21 in 2015. While the previous increase was driven by a shift from those unaware of the NHS to those developing a good opinion of the Niagara Health System, this year's increase was driven by a shift from bad opinion to not having enough information to form an opinion. This shift could be driven by a reduction of negative content in the media surrounding the changes at NHS.



Good Opinions of NHS

Top Reasons for Good Opinion



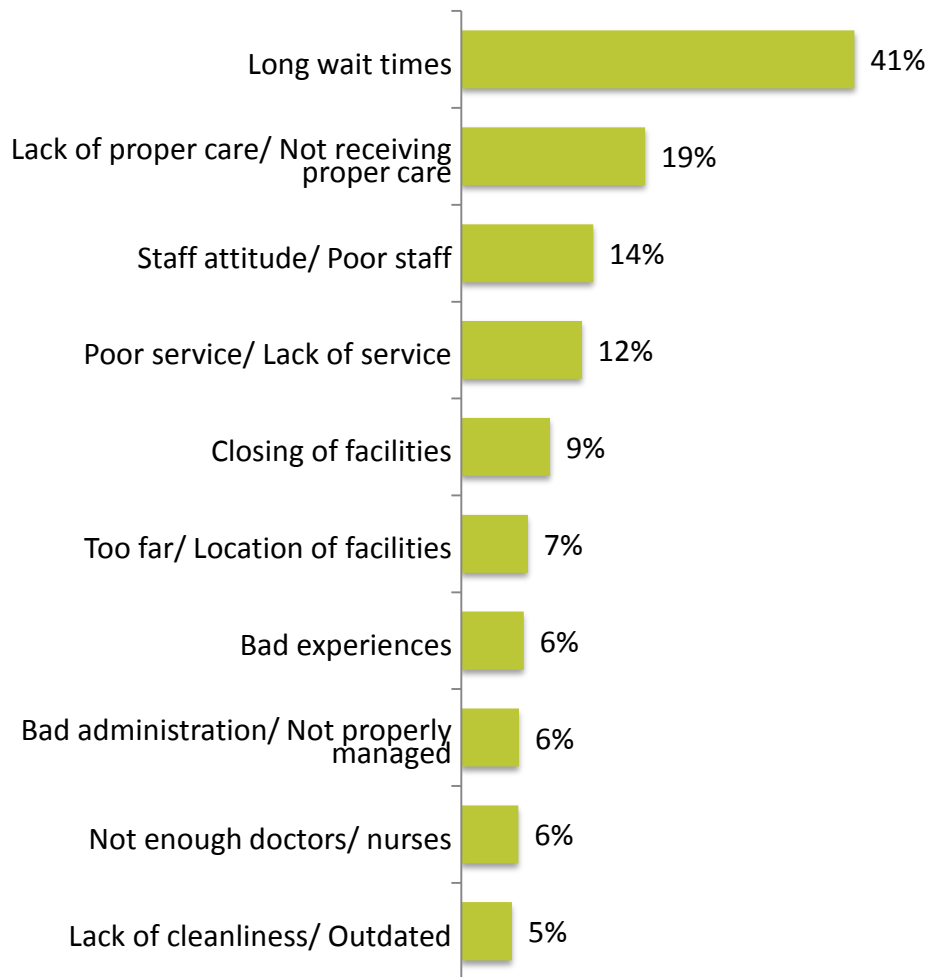
49% have a good opinion of NHS

Close to half of respondents have a good opinion of the NHS.

Positive opinions are driven by a number of factors including perceptions of positive and timely care, high quality staff and positive personal experiences using the system.

Bad Opinions of NHS

Top Reasons for Bad Opinion



28% have a bad opinion of NHS

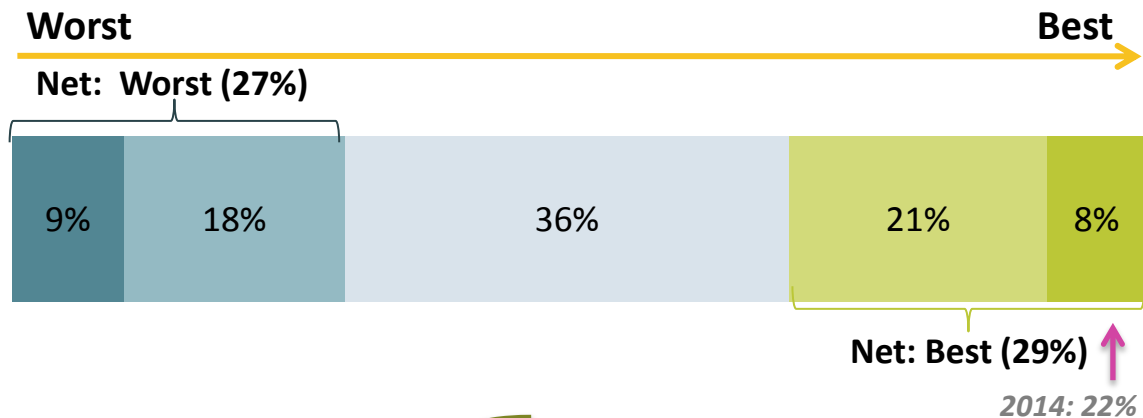
Just over a quarter of those surveyed have a bad opinion of the NHS.

As seen in 2014 the top reason given for having a negative opinion is long wait times. Bad opinions are also driven by a variety of other factors including perceptions of poor staffing / attitude or lack of staff as well as the closing of facilities and long travel times.

Perceptions of Niagara Health System

NHS compared to Other Ontario Hospitals

How would you rate the Niagara Health System?



TOP
Reasons for
'Best' Rating

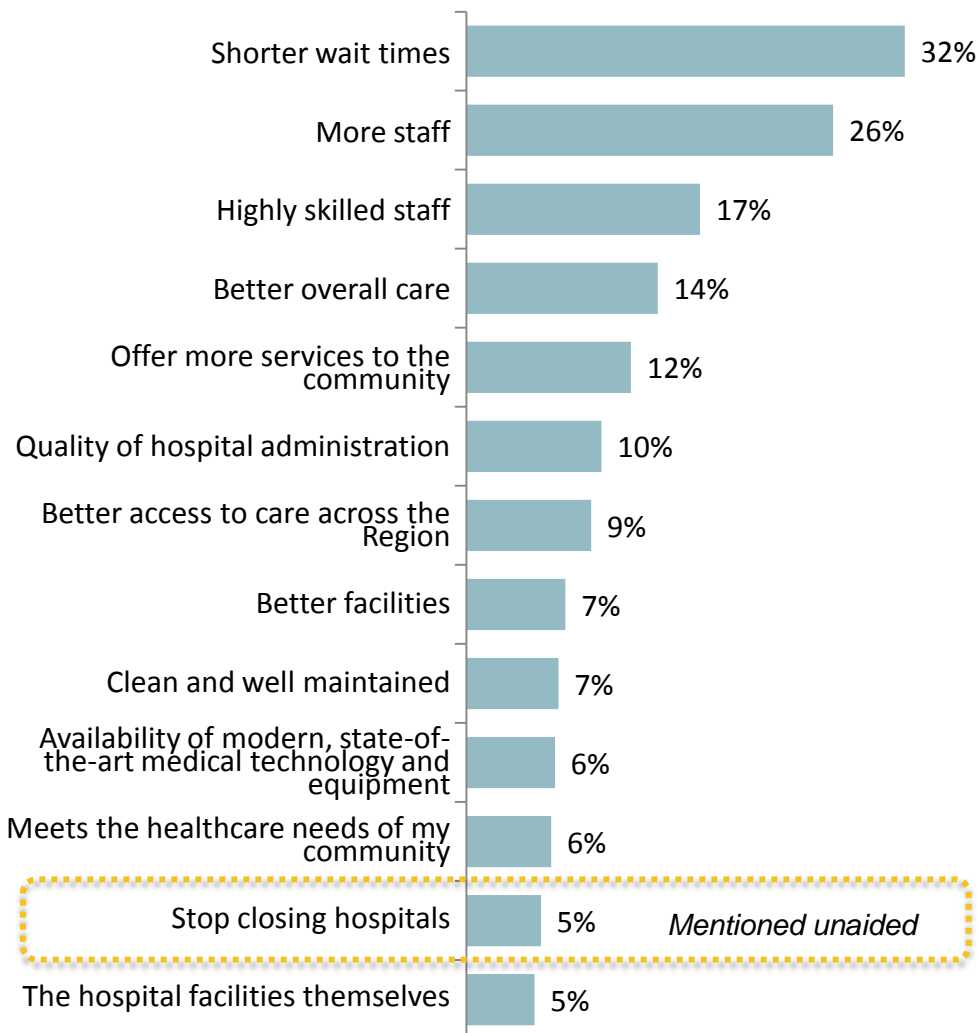


There is a significant shift upwards in terms of the proportion who rate NHS as the best compared to other Ontario hospitals compared to the previous wave in 2014 (22%).

It is worth noting that three of the top ratings are due to the staff at the NHS.

Improving the NHS

What would you do to improve the NHS?



2014

41%

40%

25%

21%

22%

19%

22%

16%

17%

15%

18%

2%

14%

Among those who have a neutral to poor opinion of NHS compared to other Ontario hospitals, top ways they would improve NHS include shorter wait times and more staff.

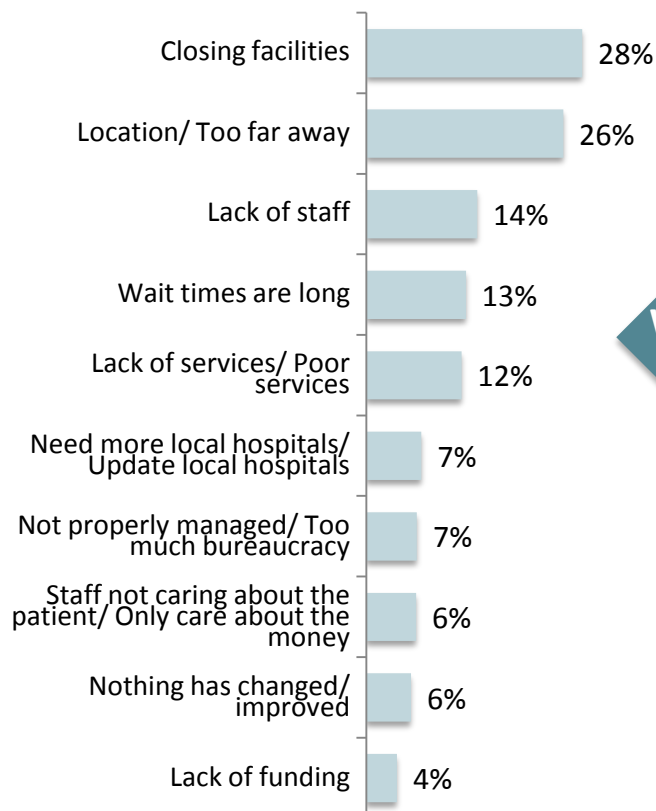
Overall the proportion for all types of improvements has decreased since 2014.

Opinions on NHS Direction

Similar to last wave about one-half of NHS community residents feel the NHS is moving in the right direction while about one-third say it is moving in the wrong direction.

New facilities and improvements along with good quality care and specialized services are top reasons respondents feel the NHS is moving in the right direction. Among those who feel the NHS is moving in the wrong direction top reasons include closing facilities and location issues. Encouragingly, residents are more likely to feel that the NHS is moving in the right (49%) vs. wrong direction (32%).

Why do you feel the NHS is moving in the wrong direction?



Would you say the NHS is moving in the right or wrong direction?

Wrong Direction (32%)

Right Direction (49%)

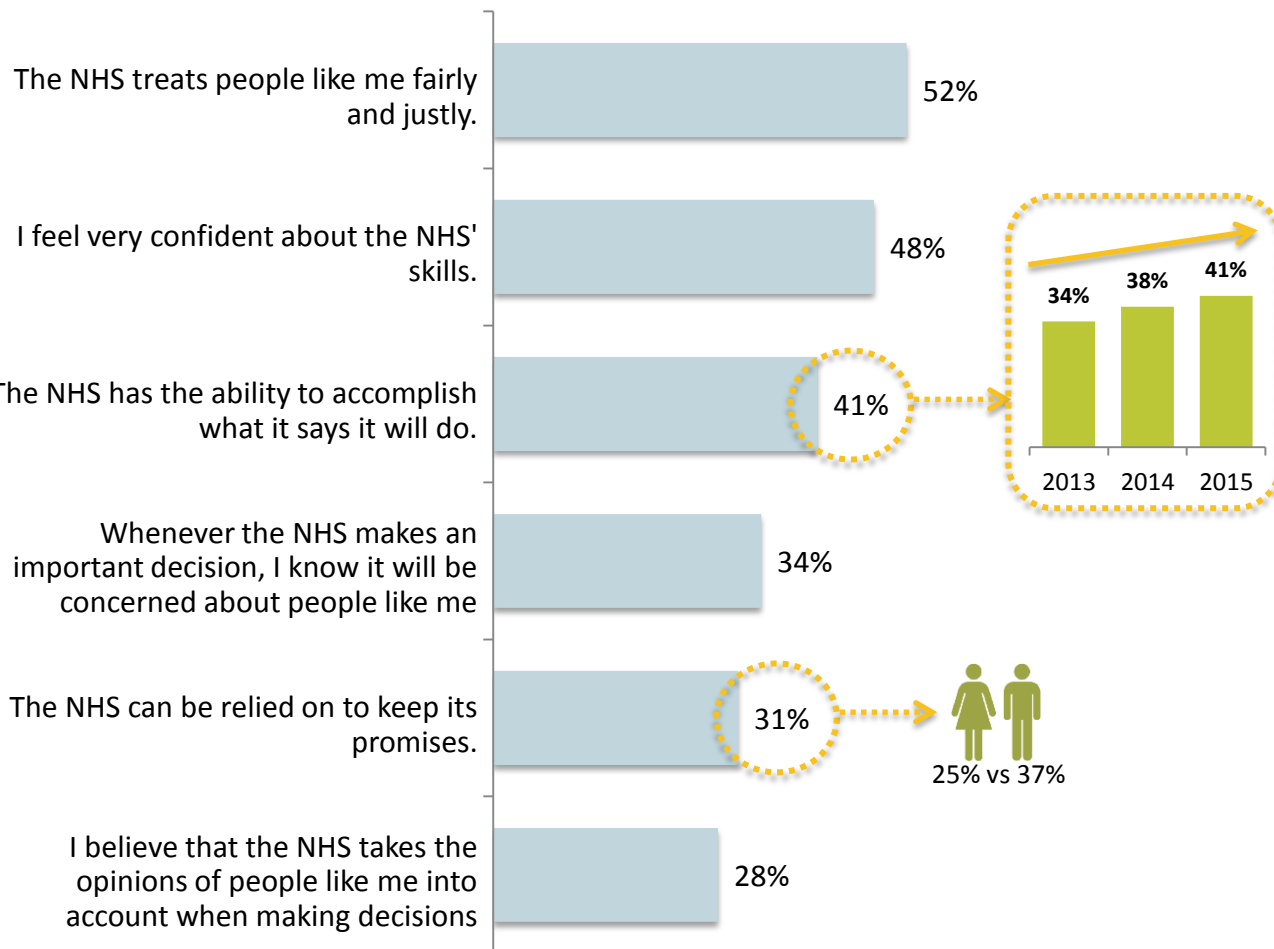
Why do you feel the NHS is moving in the right direction?



Perceptions of NHS

To what extent do you agree with each of the following statements?

% Somewhat / Strongly Agree



Similar to 2014, approximately one-half of Niagara residents agree the NHS treats people like them fairly and that they have confidence in NHS' skills.

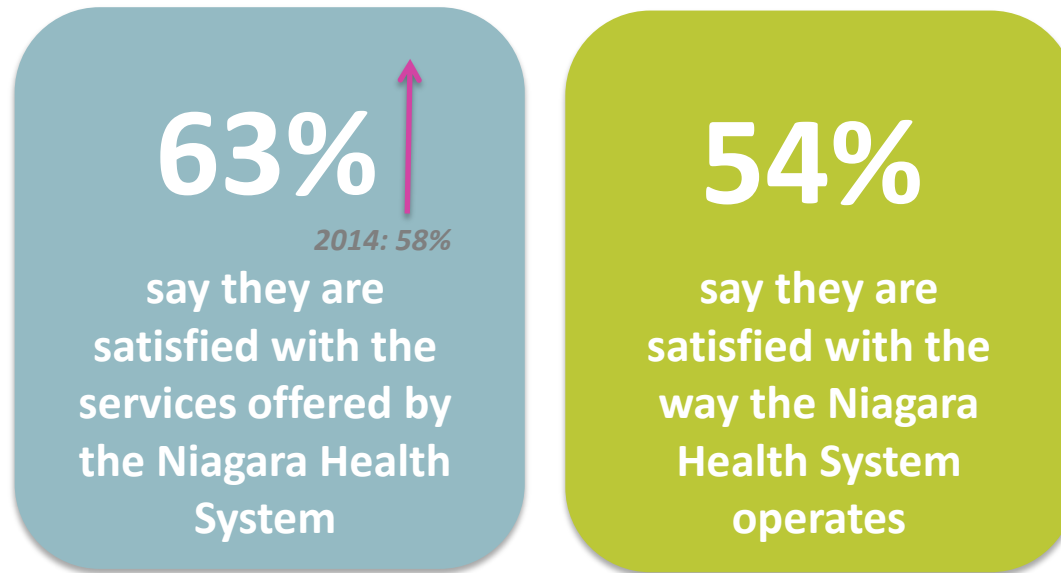
Since 2013, the proportion of Niagara residents who say the NHS has the ability to accomplish what it says it will has continued to increase.

Roughly one-third of residents agree the NHS is concerned with people like them in their decisions-making, can be relied on to keep promises, and takes opinions of people like them into account.

Men are more likely than women to say the NHS can be relied on to keep its promises.

Level of Satisfaction with NHS

63% say they are satisfied with the services offered by the Niagara Health System, a 5% increase compared to last year. However, like last year, Niagara residents are less satisfied overall with the way the NHS operates (54%) in comparison to the services offered.



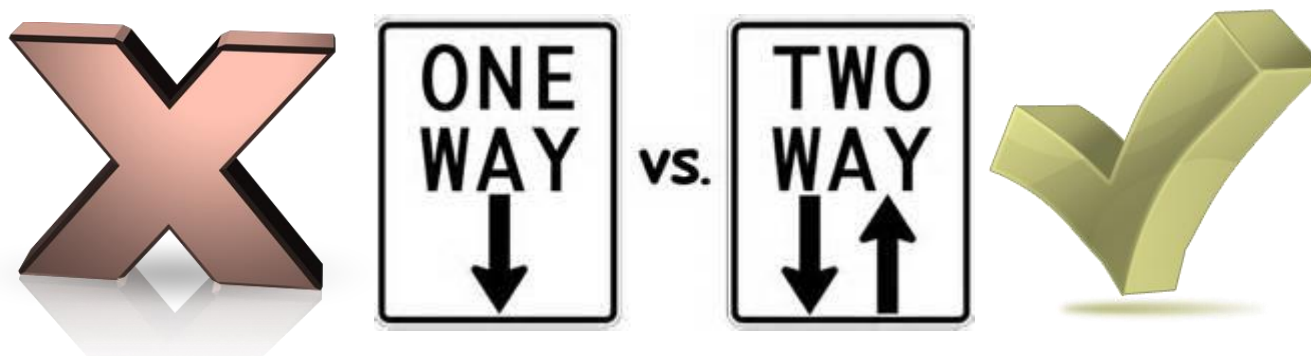
Relationship Measurement

Understanding and Measuring Relationships

A relationship cannot be measured by a single individual score. Leger has done extensive research in understanding what influences reputation and similarly what drives a relationship.

Respondents were asked to rate the Niagara System on several key metrics:

- To what extent do you **trust** the Niagara Health System?
- To what extent do you believe that the Niagara Health System is **honest/transparent**?
- To what extent do you believe that the Niagara Health System is **committed to meeting your expectations** (or needs)?
- To what extent do you believe that you can **influence the decisions or direction** of the Niagara Health System?



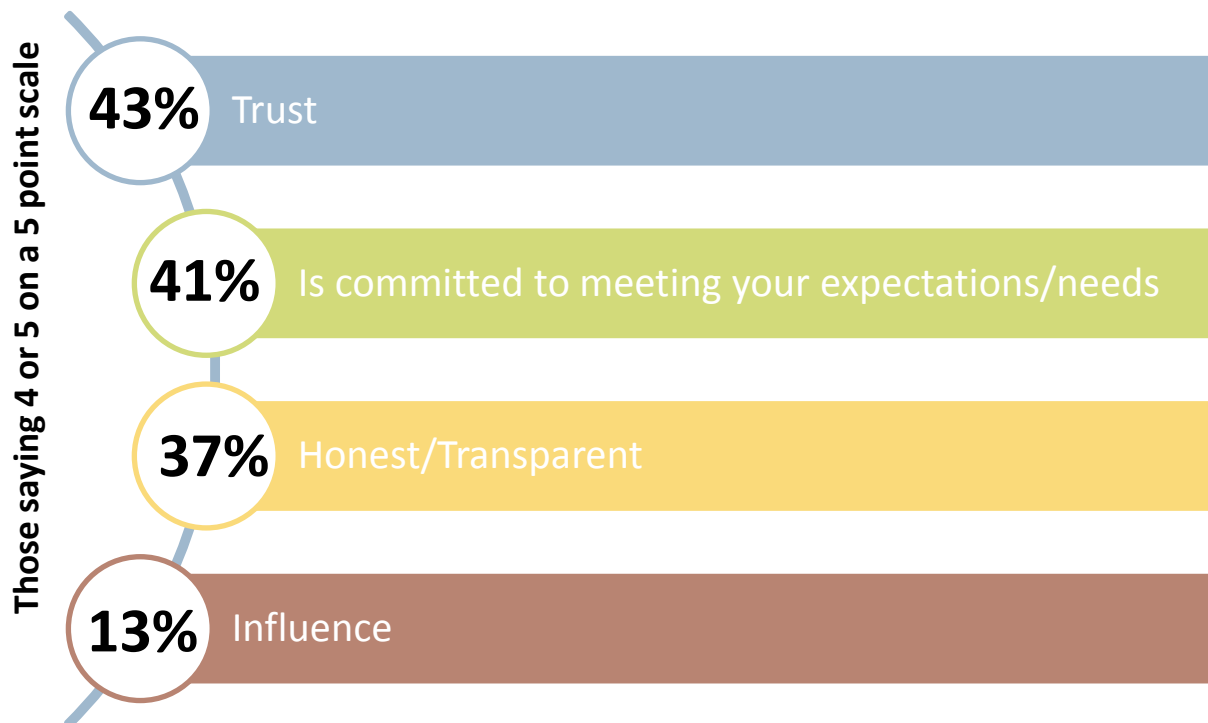
From a communications angle, a two-way symmetrical model is often viewed as being the desired result. The relationship measurement questions take into account this two-way ideal relationship as well as the other variables that feed into a well-developed relationship – in this case between the Niagara Health System and the communities it serves.

Relationship Measurement Scores

Any relationship, whether it is 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 with good standings across all points (Trust, Commitment, Honesty & Influence). Top performers are able to score 80% or higher across all 5 questions.

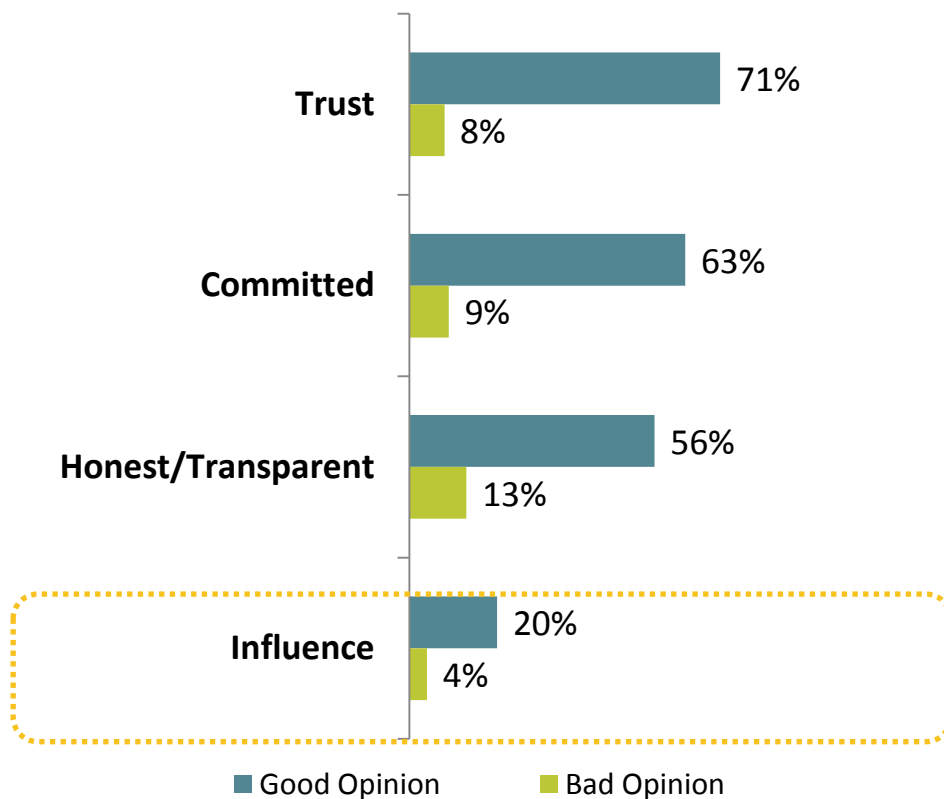
The Niagara Health System is particularly weak in the perception that Niagara residents have the ability to influence the decisions or direction of the NHS.

No significant changes seen from previous wave (2014)



Relationship Measurement Scores – By Opinion

Those saying 4 or 5 on a 5 point scale



There is a strong relationship between opinion (reputation) and the relationship measures.

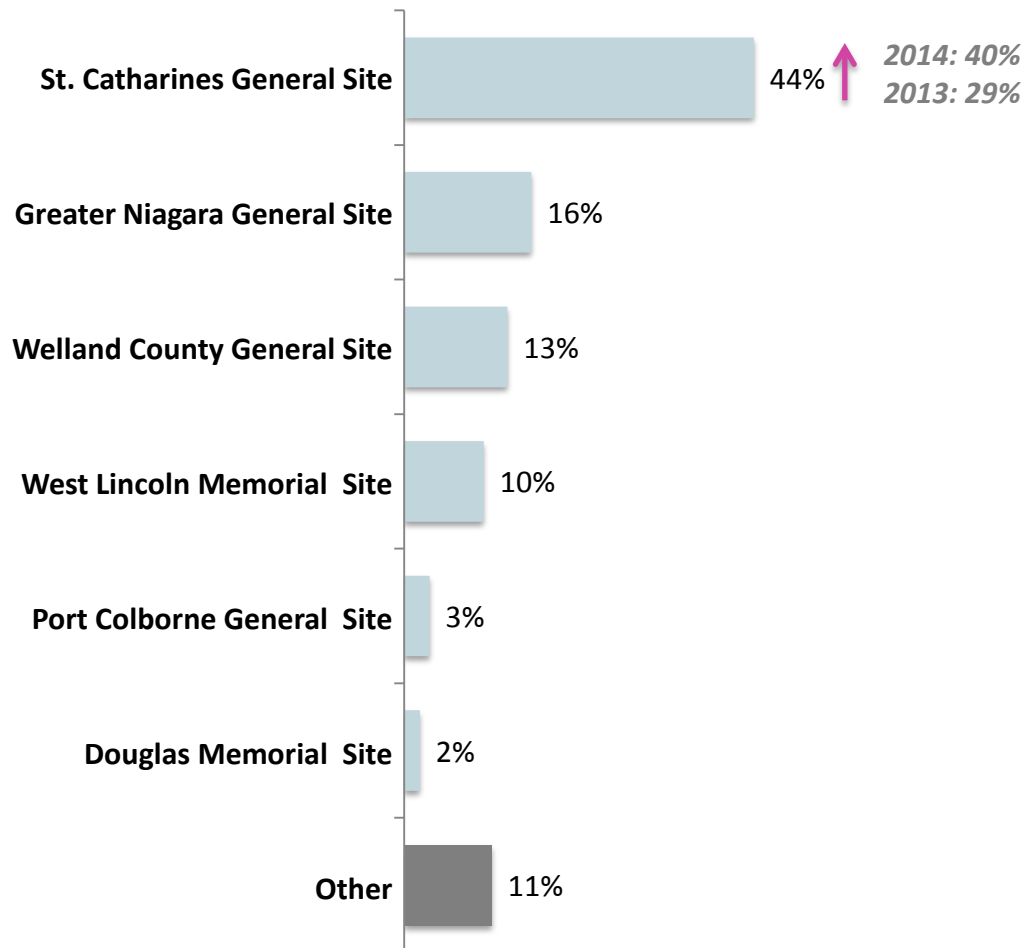
Among those who have a good opinion of the Niagara Health System relationship scores are significantly higher across the board.

That said, it is critical to point out that like in the previous wave even among those who have a good opinion of the NHS, the belief that individuals have influence on the NHS is low.

Hospital Usage

Local Hospital Usage

Which hospital have you or a member of your household gone to most often in the past 12 months?



Visits to the St. Catharines General Site (previously called New St. Catharines Hospital) continue to increase compared to previous years (44% vs. 40% in 2014 and 29% in 2013).

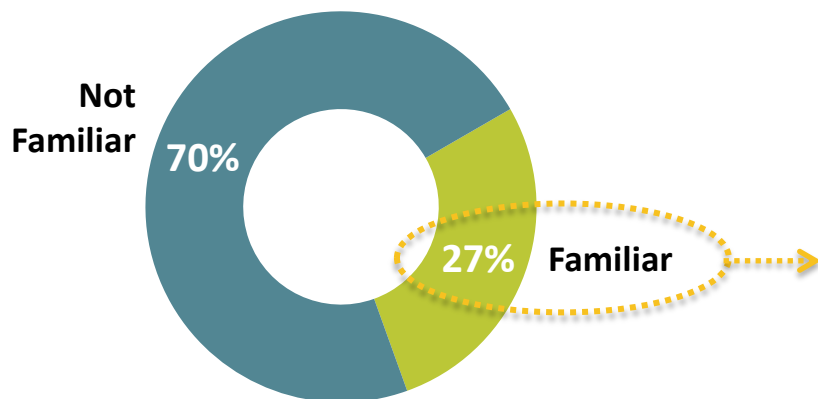
Those in St. Catharines (85%), Thorold (81%) and Niagara-on-the-Lake (58%) are the most likely to have used the St. Catharines General site in the last 12 months.

Views on NHS Changes

Familiarity with NHS Changes

A majority of Niagara residents say they are not familiar with upcoming changes to the NHS (70%). Among Niagara residents familiar with the upcoming changes (27%), primary sources of awareness are newspaper (55%), friends, family or co-workers (26%) as well as television news (17%).

How familiar are you with the upcoming changes to the NHS?

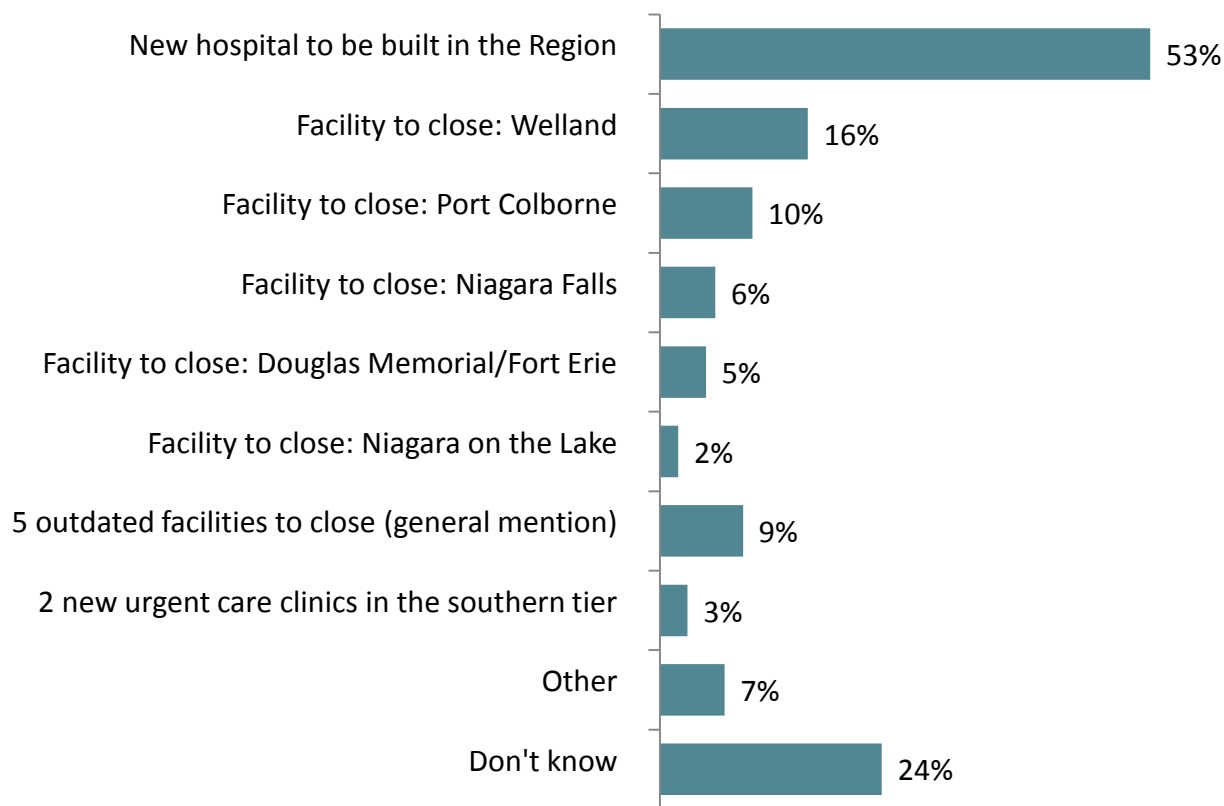


Sources of Familiarity	n=270
Newspaper	55%
Friends, family or co-worker	26%
News (television)	17%
Radio	8%
A medical practitioner mentioned it	7%
It was mentioned at a community meeting	3%
I received an email	3%
Local politician mentioned the changes	2%
I received a piece of mail	2%
Other	22%

Knowledge of Changes

Among those familiar with the changes that will be occurring at the NHS, more than one-half are aware of the new hospital to be built in the region (53%). Close to a quarter of residents are not aware of any specific changes.

To the best of your knowledge what changes will be occurring?

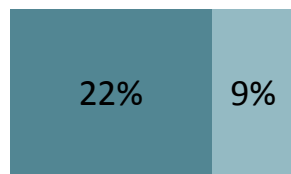


Concerns About Upcoming Changes

One-half of Niagara residents say they are concerned about upcoming NHS changes (51%). Top concerns relate to potential reductions in service such as access to healthcare and emergency response times. Loss of community resources and increased travel times are also concerns for about half.

Concern over upcoming NHS Changes

**Net: Unconcerned
(31%)**



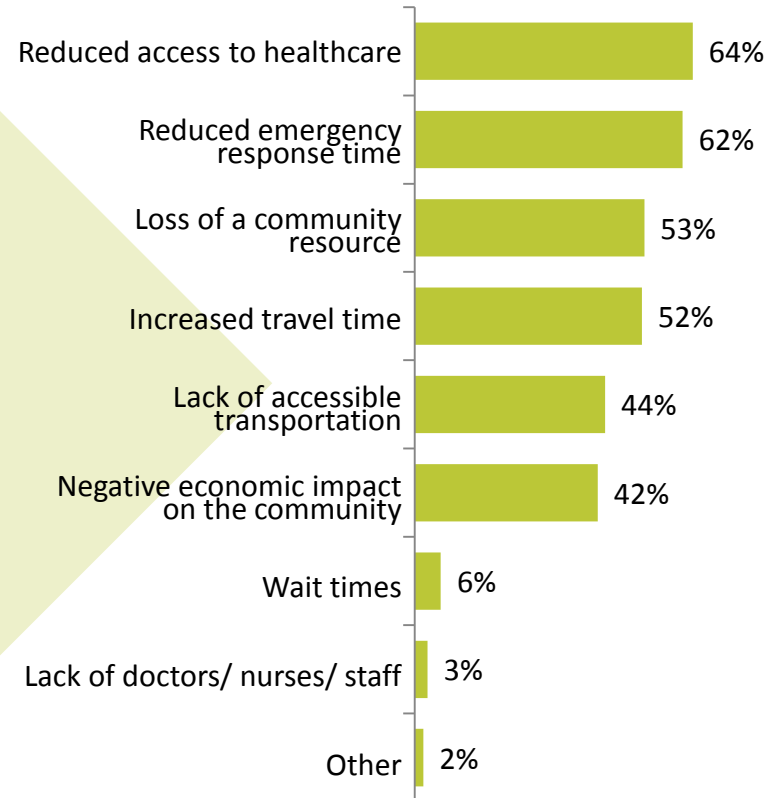
*Don't know / prefer
not to answer: 18%*

32%

19%

**Net: Concerned
(51%)**

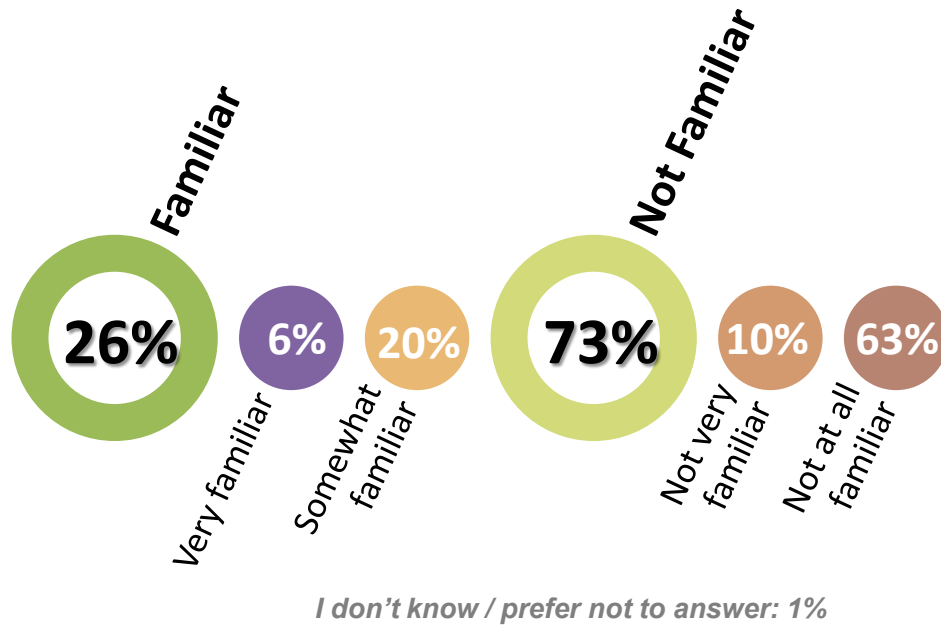
Which of the following concerns do you have?



NHS – the ONE Foundation

Familiarity with the ONE Foundation

How familiar are you with the ONE foundation?

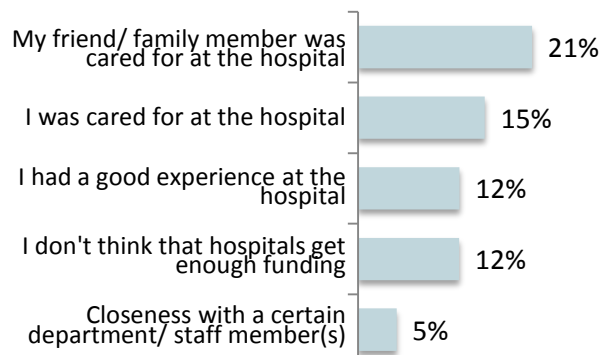


The majority of Niagara residents (73%) are not familiar with the NHS foundation – the ONE foundation.

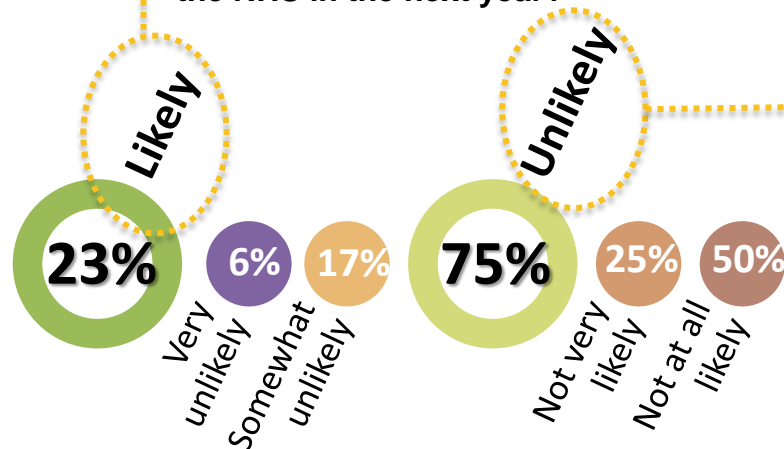
Only 26% say they are somewhat or very familiar with the foundation

Likelihood to Donate to the NHS

What makes you interested in donating?



How likely are you to make a donation to the NHS in the next year?

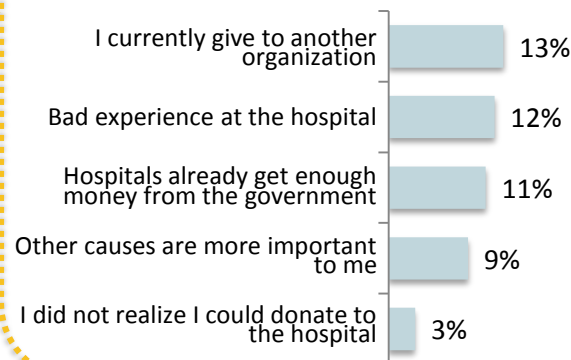


I don't know / prefer not to answer: 1%

The majority of Niagara residents say they are unlikely to donate to the NHS in the next year (75%). Reasons for not donating include giving to another organization / other causes are more important, bad experiences with the NHS and lack of perceived need.

Among those who are likely to donate; personally being cared for or having a friend or family member who has been cared for by the NHS is the primary reason for wanting to give.

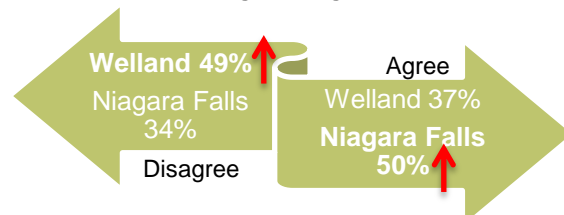
What makes you uninterested in donating?



Niagara Falls vs. Welland

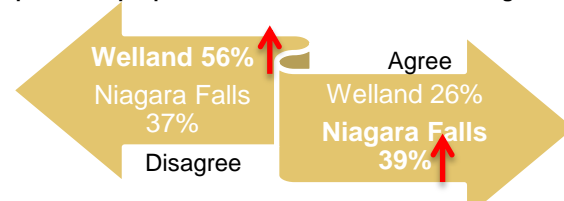
Welland versus Niagara Falls (Significant Differences)

Q10. The NHS is heading in the right direction.*

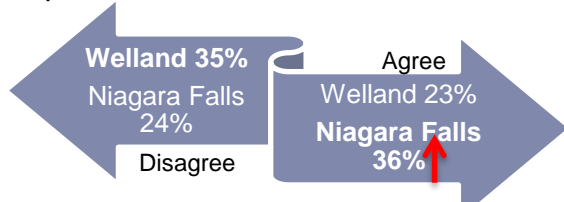


Q11. 48% of respondents from Welland (n=54) say the closing of facilities is the reason the NHS is heading in the wrong direction vs 12% of Niagara Falls residents (n=64).

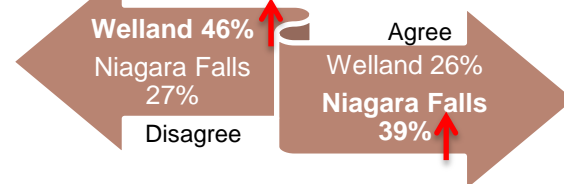
Q12D. I believe that the Niagara Health System takes the opinions of people like me into account when making decisions.*



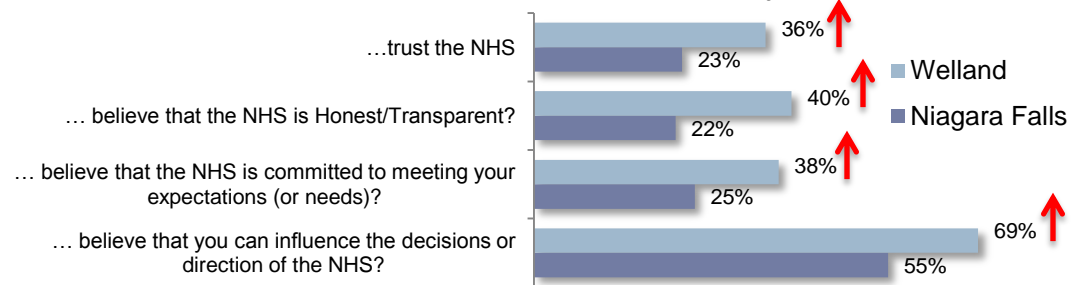
Q12C. The Niagara Health System can be relied on to keep its promises.*



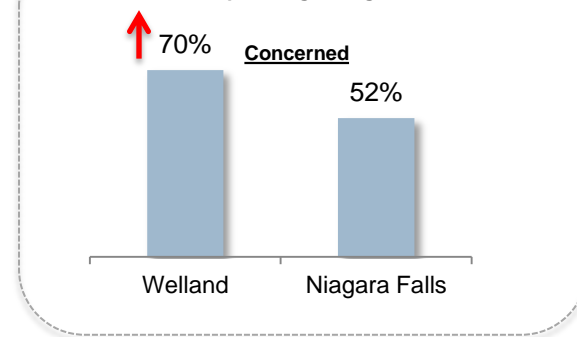
Q12B. Whenever the Niagara Health System makes an important decision, I know it will be concerned about people like me.*



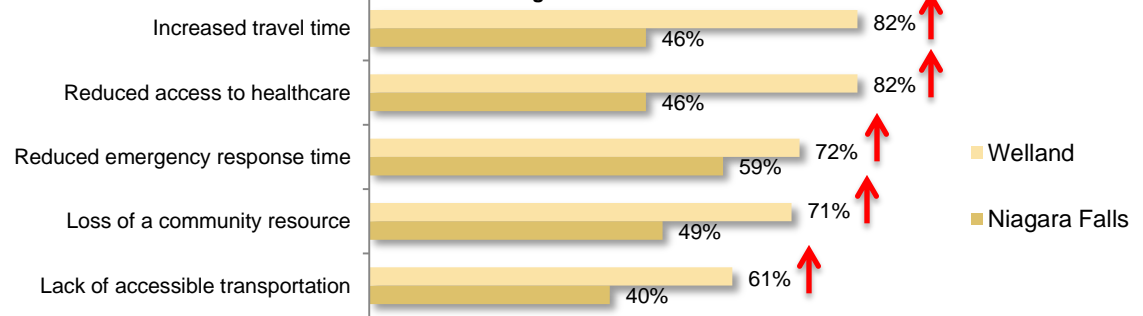
Q15. To what extent do you...*



Q29. To what degree are you concerned about the upcoming changes to the NHS?*



Q30. Which of the following concerns, if any, do you have?*** (Top 5 Mentions)
Among those who are concerned

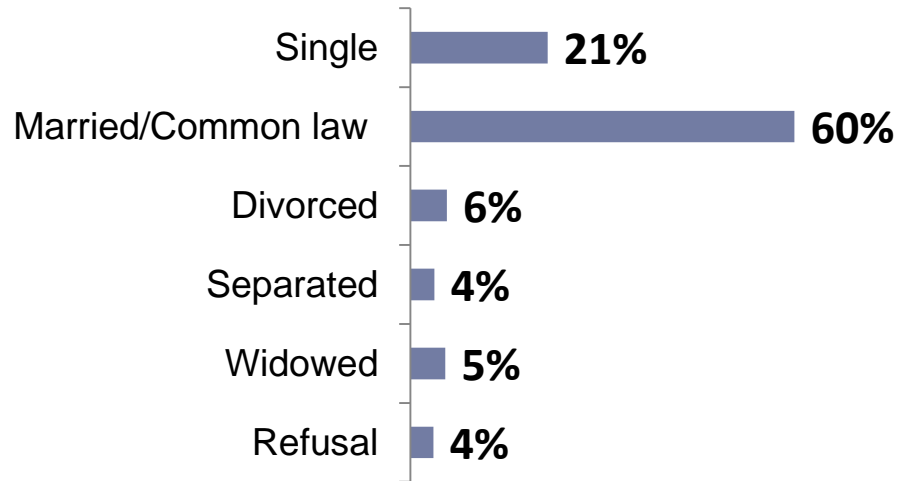


*** Welland n=80, Niagara Falls n=103

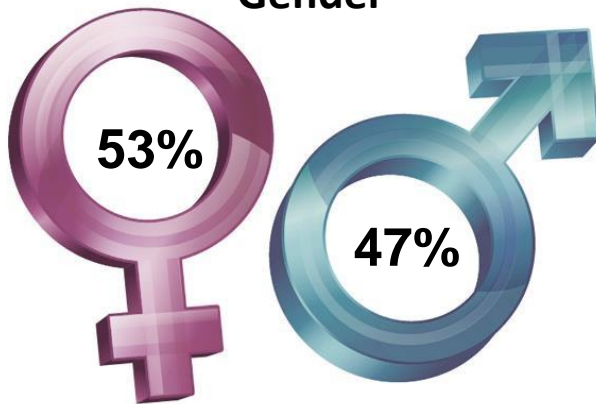
Profile of Respondents

Profile of Respondents

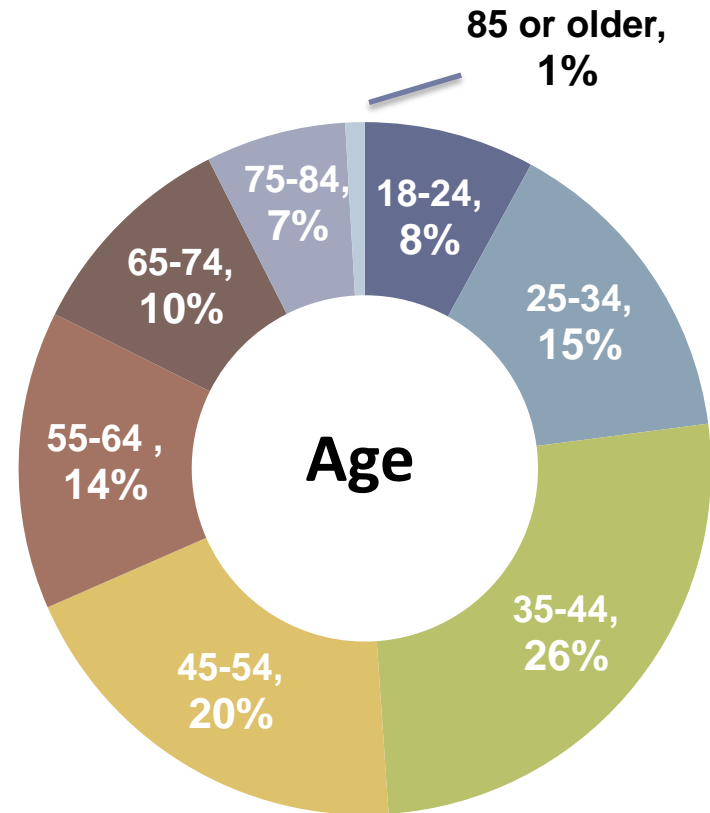
Marital Status



Gender

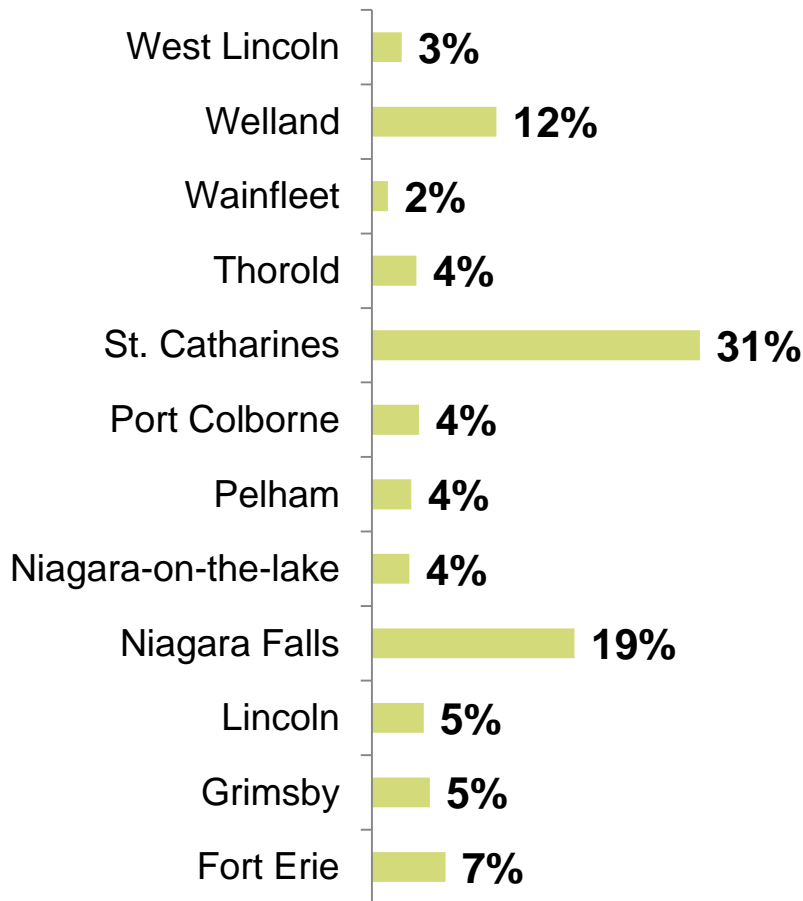


Age

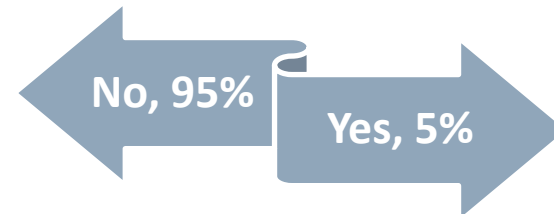


Profile of Respondents

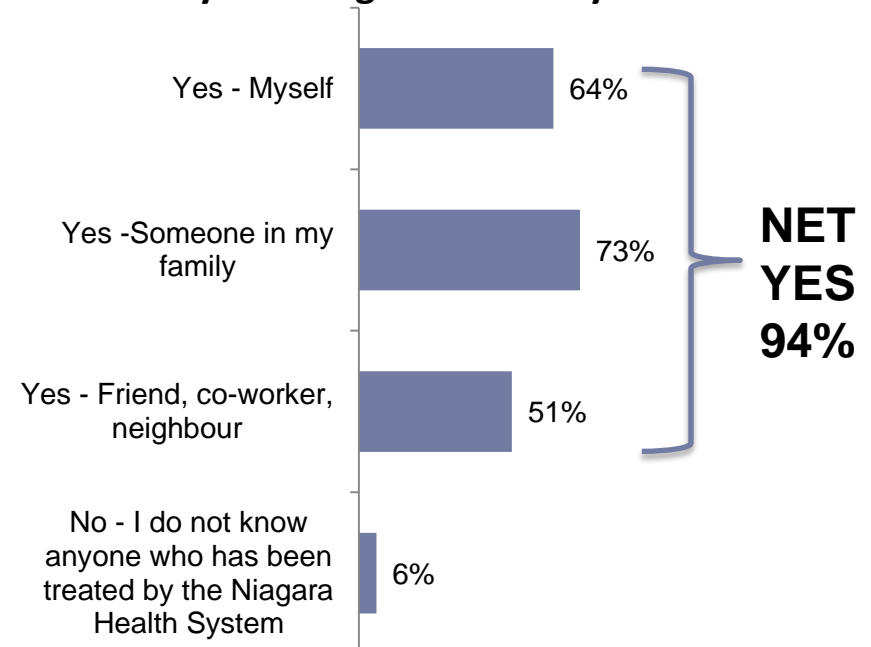
In which Niagara region do you live?



Do you or anyone in your household currently work for the Niagara Health System?

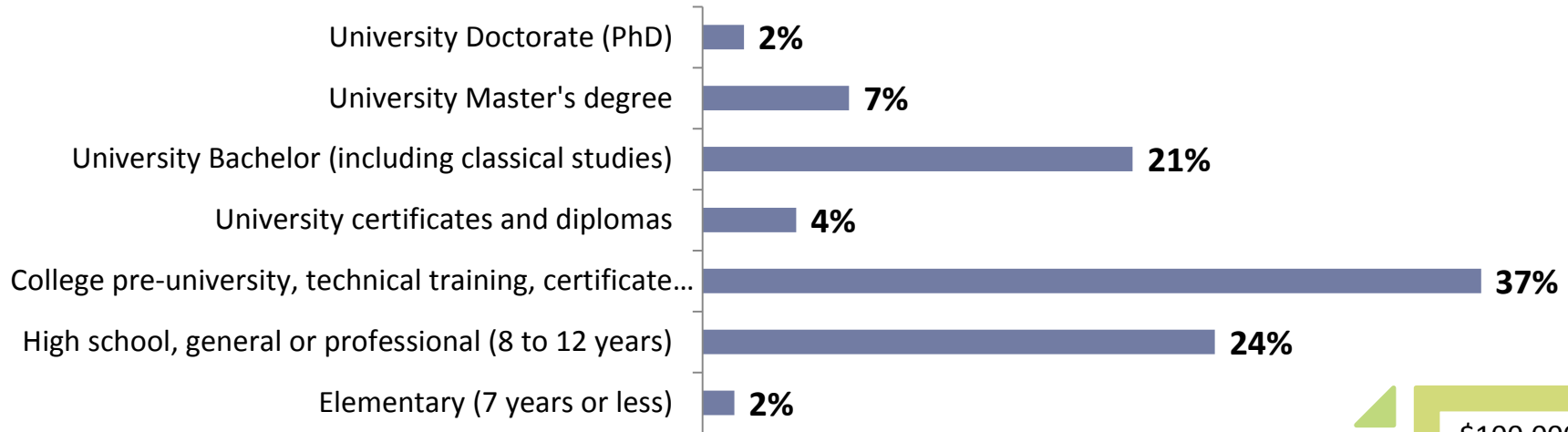


Do you know someone who has ever been treated by the Niagara Health System?

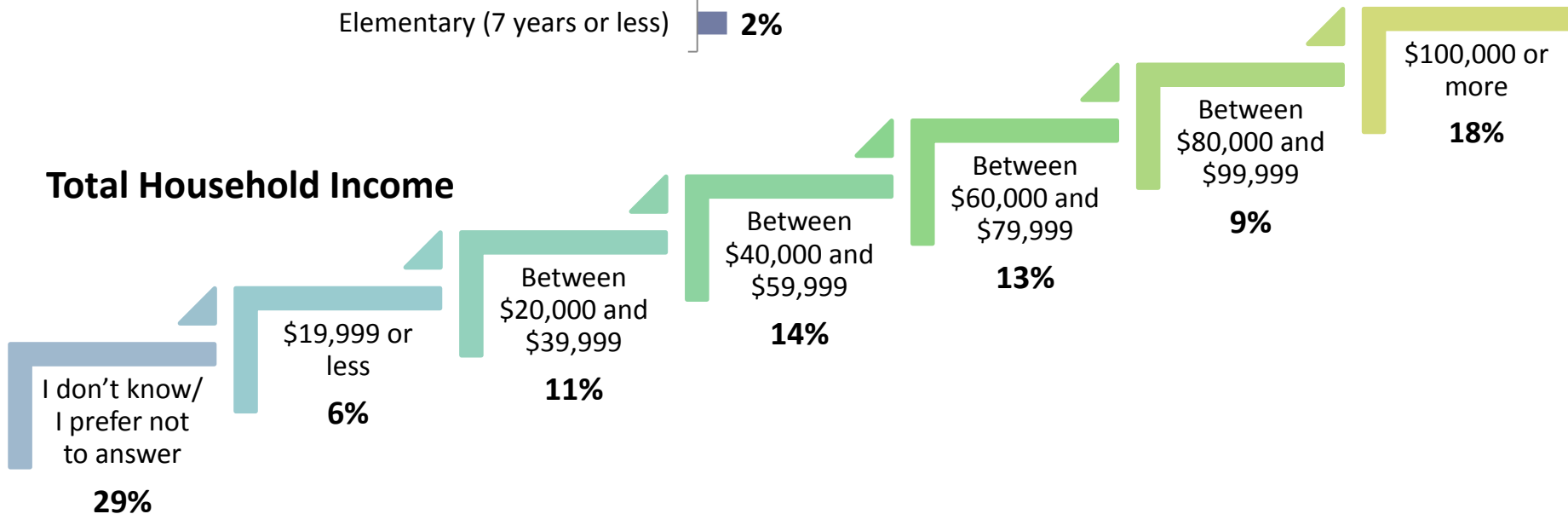


Profile of Respondents

Education



Total Household Income



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Erin Deviney

Senior Consultant, Communications & Public Affairs

416.964.4117

edeviney@leger360.com

Lisa Covens

Vice President, Communications & Public Affairs

416.964.4107

lcovens@leger360.com