



Project Summary – Ontario Medical Association
submitted by Nanos, May 2014 (Submission 2014-499)



Executive Summary

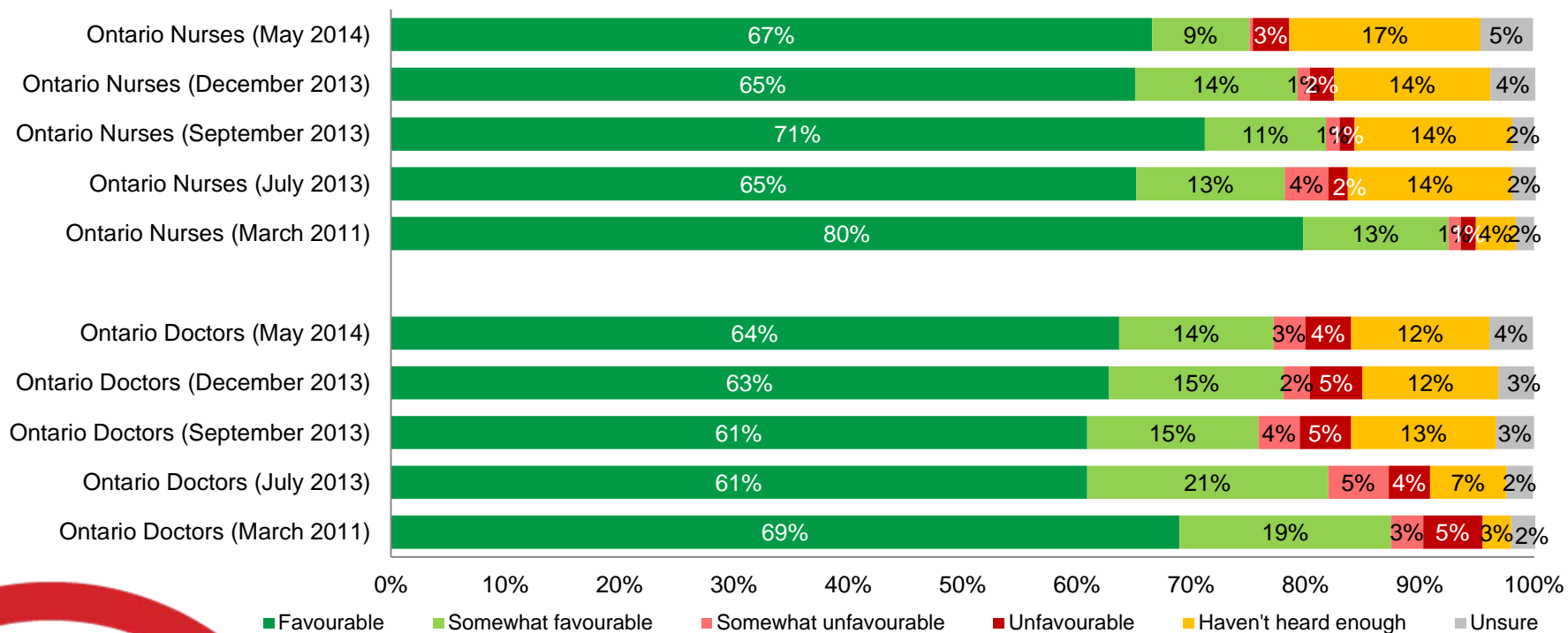
Healthcare is an important issue for Ontarians and a strong platform on healthcare can benefit the political parties as the election nears according to the latest survey of 500 Ontarians conducted between May 22nd and 26th, 2014.

Just under half of Ontarians (44.3%) would like more focus on health care in the election compared with 42.7% who think the current focus is about right. In fact, 67.6% say that if a party had a strong platform on healthcare, they would be more likely to vote for it.

Overall impressions of doctors and nurses remain positive and stable according to tracking over the past 10 months and support for a pay increase (45.9%) for doctors outweighs opposition (41.2%).

Impressions of Doctors and Nurses

Source: Nanos Research, RDD dual frame random telephone survey, May 22 to 26, 2014, n=500 accurate 4.4 percentage points plus or minus, 19 times out of 20.



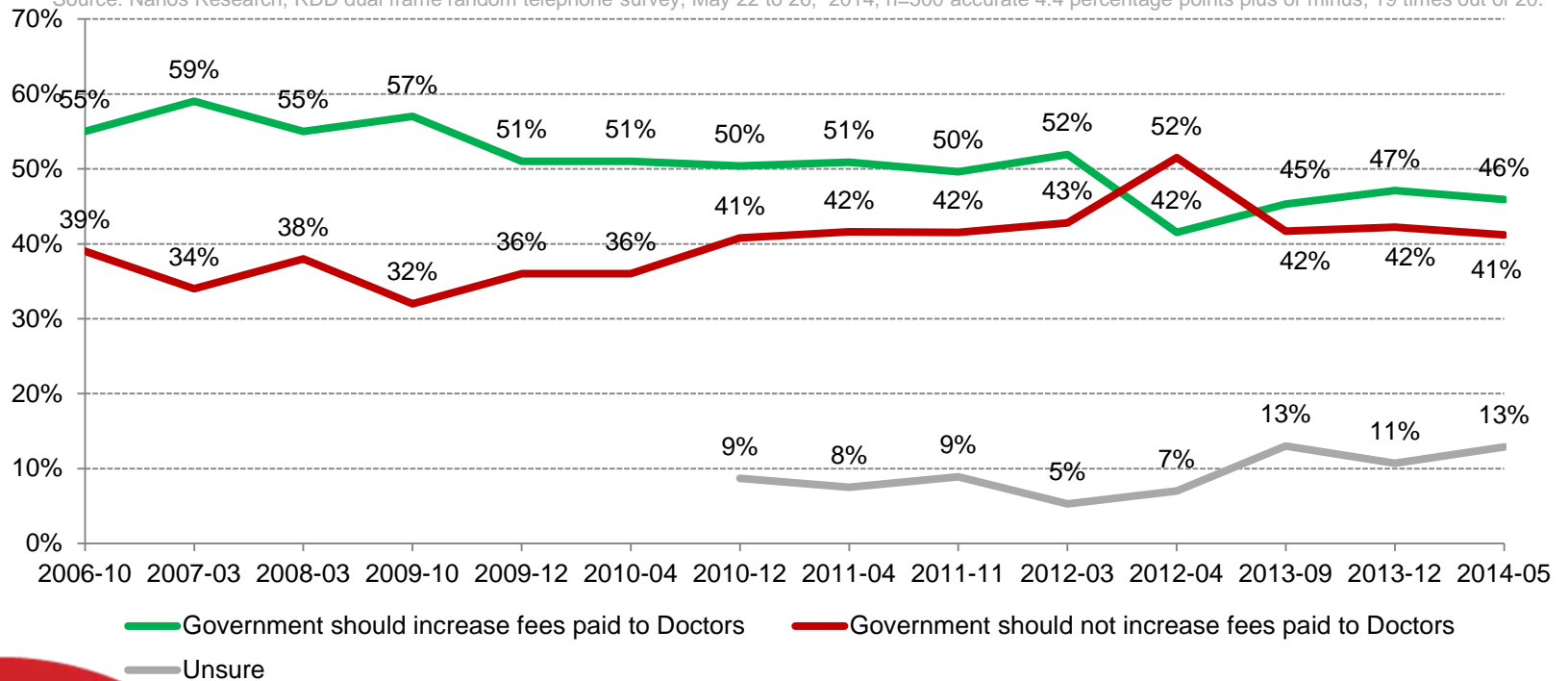
***Note: Charts may not add up to 100 due to rounding.**

QUESTION – I’m going to read you a list of groups active in Ontario’s healthcare system. For each of the groups, please indicate whether you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of them, or whether you haven’t really heard enough about them to have a firm impression.

Impressions of Ontario doctors (63.7% favourable) and nurses (66.6%) have shown little movement since December of last year.

Fees Paid to Doctors

Source: Nanos Research, RDD dual frame random telephone survey, May 22 to 26, 2014, n=500 accurate 4.4 percentage points plus or minus, 19 times out of 20.



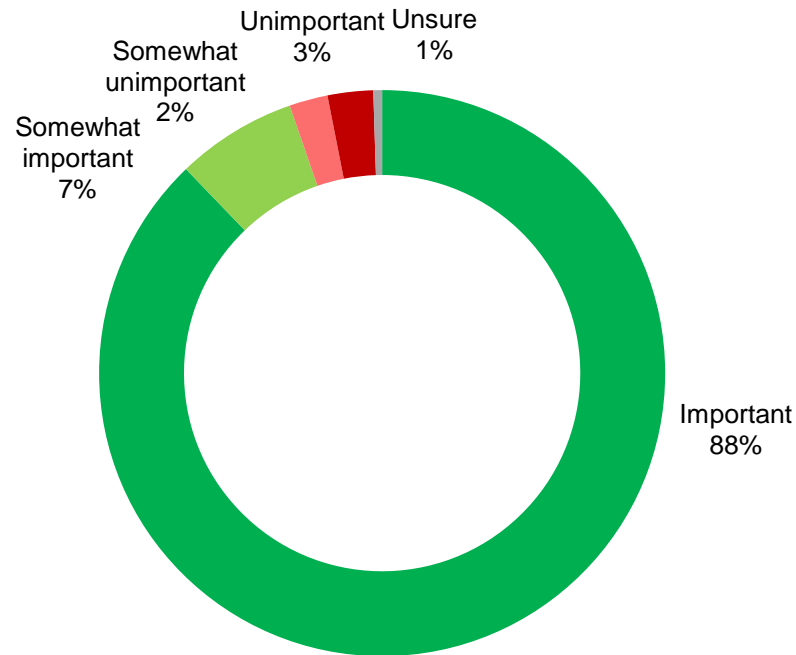
***Note: Charts may not add up to 100 due to rounding.**

QUESTION – As you may know, the provincial government is responsible for paying fees to Doctors so that they can provide services to patients. [ROTATE] Some people believe that the provincial government should increase the fees it pays to Doctor so that Ontario can attract more doctors, while others believe that the provincial government should hold the line on the fees it pays because doctors are already paid a lot of money. Which of those statements, if either, best reflects your opinion?

Ontarians continue to favour an increase (45.9%) for doctors by a small margin, which has not changed since August of 2013.

Importance of Healthcare

Source: Nanos Research, RDD dual frame random telephone survey, May 22 to 26, 2014, n=500 accurate 4.4 percentage points plus or minus, 19 times out of 20.



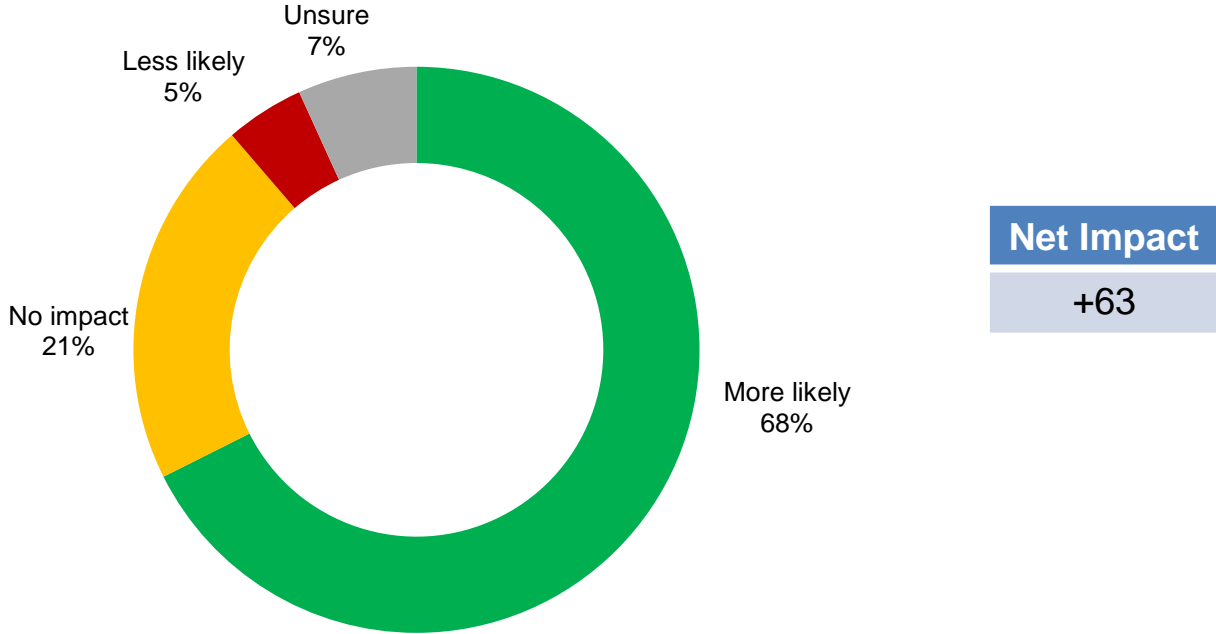
***Note: Charts may not add up to 100 due to rounding.**

QUESTION – Would you say that healthcare is an important, somewhat important, somewhat unimportant or unimportant issue for you personally?

Most Ontarians (87.9%) say that healthcare is an important issue to them personally.

Impact on Vote

Source: Nanos Research, RDD dual frame random telephone survey, May 22 to 26, 2014, n=500 accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding.**

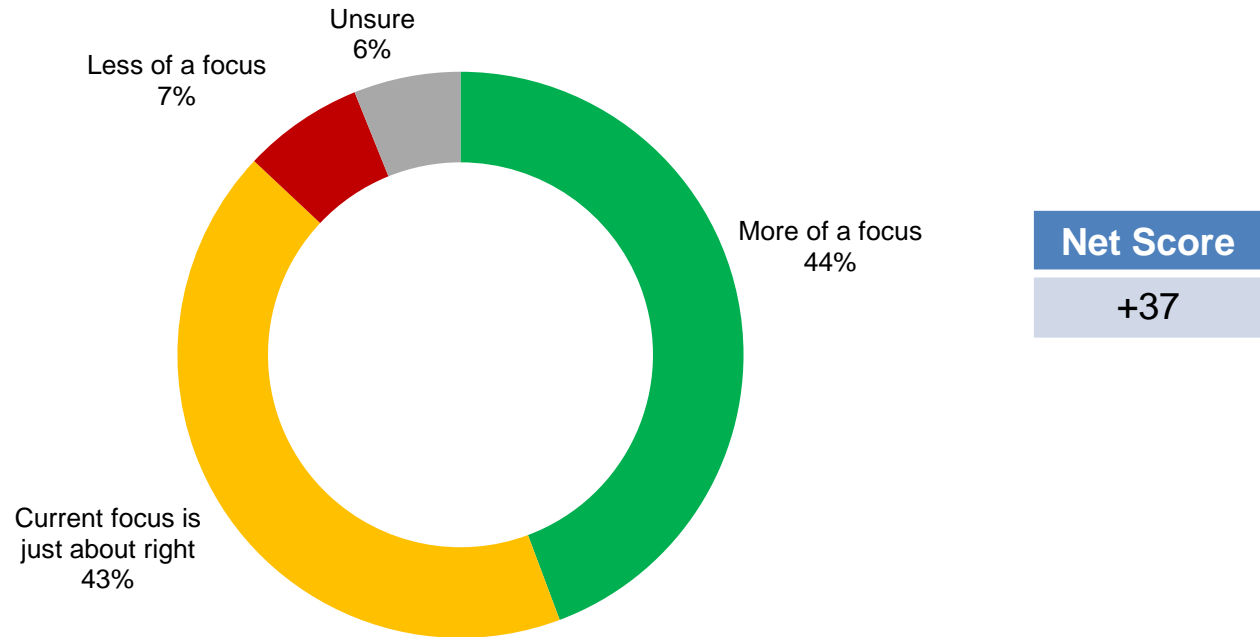
QUESTION – If a provincial party had a strong platform on healthcare, would you be more likely, less likely, or would it have no impact on your likelihood to vote for that party?

More than two thirds of Ontarians (67.6%) say that having a strong platform on healthcare would have an impact on their likely vote for a party.



Focus on Healthcare

Source: Nanos Research, RDD dual frame random telephone survey, May 22 to 26, 2014, n=500 accurate 4.4 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding.**

QUESTION – For this provincial election do you think there should be less of a focus on healthcare, more of a focus on healthcare, or is the current focus on healthcare just about right?

In general, Ontarians are split between wanting more of a focus on healthcare (44.3%) and thinking the current focus is about right (42.7%).



Methodology

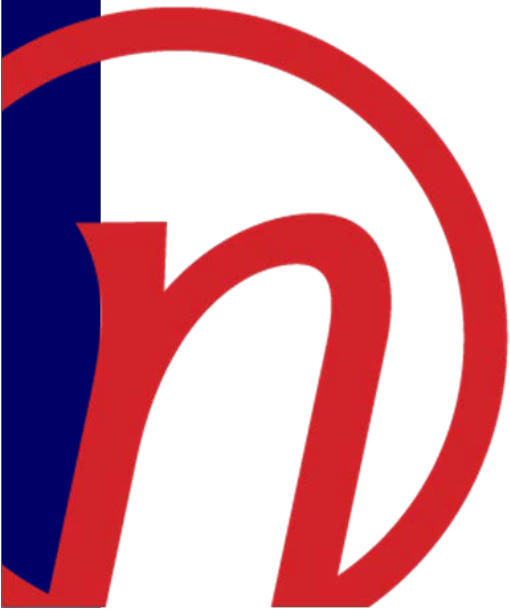
Methodology

The survey was commissioned by the Ontario Medical Association. This random telephone survey of 500 Ontarians was conducted between May 22nd and 26th, 2014, as part of an Ontario omnibus survey by Nanos Research. The dual frame sample included both land- and cell-lines across Ontario. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of the population of Ontario.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 500 Ontarians is ± 4.4 percentage points, 19 times out of 20.

Note: Charts may not add up to 100 due to rounding.



About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



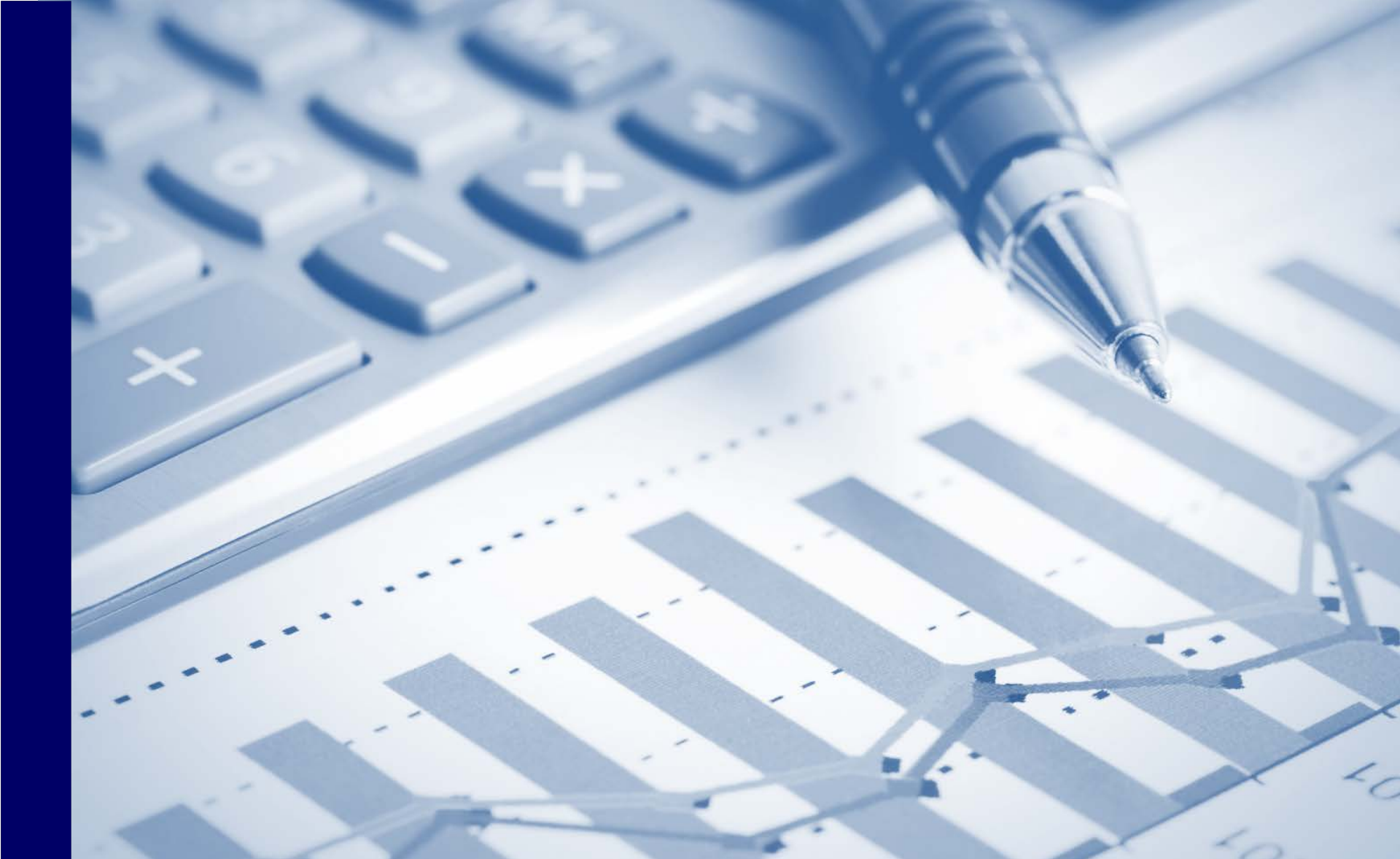
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Tabulations



2014-499 – OMA –TRACKING SURVEY – STAT SHEET – DRAFT

I'm going to read you a list of groups active in Ontario's healthcare system. For each of the groups, please indicate whether you have a favourable, somewhat favourable, somewhat unfavourable, or unfavourable impression of them, or whether you haven't really heard enough about them to have a firm impression. [ROTATE Q1-Q2]

| | | Question 1 – Ontario Nurses | | | | | | |
|--------------|-----------------|-----------------------------|------------|---------------------|-----------------------|--------------|----------------------|------------|
| | | Total | Favourable | Somewhat favourable | Somewhat unfavourable | Unfavourable | Haven't heard enough | Unsure |
| | | Responses | Percentage | Percentage | Percentage | Percentage | Percentage | Percentage |
| | Ontario 2014-05 | 500 | 66.6 | 8.5 | .3 | 3.2 | 16.7 | 4.6 |
| Gender | Male | 250 | 62.8 | 11.9 | .0 | 2.8 | 18.1 | 4.4 |
| | Female | 250 | 70.4 | 5.2 | .6 | 3.6 | 15.3 | 4.9 |
| | | | | | | | | |
| Age | 18 to 29 | 102 | 53.6 | 14.3 | .0 | .0 | 32.1 | .0 |
| | 30 to 39 | 88 | 66.1 | 5.4 | .0 | 3.6 | 16.1 | 8.9 |
| | 40 to 49 | 106 | 77.5 | 4.2 | .0 | 4.2 | 8.5 | 5.6 |
| | 50 to 59 | 86 | 64.3 | 8.9 | .0 | 4.5 | 17.9 | 4.5 |
| | 60 plus | 117 | 70.4 | 9.4 | 1.3 | 3.9 | 10.3 | 4.7 |
| Vote Profile | Liberal | 162 | 77.6 | 6.2 | .0 | 1.4 | 11.6 | 3.2 |
| | PC | 134 | 59.3 | 17.5 | .4 | 3.2 | 15.6 | 4.0 |
| | NDP | 102 | 65.4 | 5.3 | .5 | 3.4 | 21.0 | 4.3 |
| | Green | 23 | 71.6 | 2.2 | 2.2 | 6.7 | 17.2 | .0 |
| | Other | 9 | 65.2 | 8.6 | .0 | 17.6 | 8.6 | .0 |
| | Unsure | 70 | 55.5 | 3.2 | .0 | 4.0 | 25.4 | 11.9 |



2014-499 – OMA –TRACKING SURVEY – STAT SHEET – DRAFT

I'm going to read you a list of groups active in Ontario's healthcare system. For each of the groups, please indicate whether you have a favourable, somewhat favourable, somewhat unfavourable, or unfavourable impression of them, or whether you haven't really heard enough about them to have a firm impression. [ROTATE Q1-Q2]

| | | Question 2 – Ontario Doctors | | | | | | |
|--------------|-----------------|------------------------------|------------|---------------------|-----------------------|--------------|----------------------|------------|
| | | Total | Favourable | Somewhat favourable | Somewhat unfavourable | Unfavourable | Haven't heard enough | Unsure |
| | | Responses | Percentage | Percentage | Percentage | Percentage | Percentage | Percentage |
| | Ontario 2014-05 | 500 | 63.7 | 13.5 | 2.8 | 4.0 | 12.1 | 3.8 |
| Gender | Male | 250 | 63.9 | 12.7 | 3.2 | 4.9 | 12.3 | 3.0 |
| | Female | 250 | 63.6 | 14.3 | 2.3 | 3.1 | 12.0 | 4.7 |
| | | | | | | | | |
| Age | 18 to 29 | 102 | 50.0 | 21.4 | 3.6 | 3.6 | 21.4 | .0 |
| | 30 to 39 | 88 | 53.6 | 16.1 | 3.6 | 5.4 | 12.5 | 8.9 |
| | 40 to 49 | 106 | 74.6 | 12.7 | .0 | 2.8 | 7.0 | 2.8 |
| | 50 to 59 | 86 | 67.0 | 8.0 | 3.6 | 3.6 | 13.4 | 4.5 |
| | 60 plus | 117 | 71.2 | 9.4 | 3.4 | 4.7 | 7.3 | 3.9 |
| | | | | | | | | |
| Vote Profile | Liberal | 162 | 71.5 | 12.2 | 1.8 | .9 | 11.5 | 2.2 |
| | PC | 134 | 54.9 | 20.0 | 3.9 | 6.7 | 10.7 | 3.9 |
| | NDP | 102 | 68.7 | 11.5 | 2.5 | 2.5 | 12.1 | 2.8 |
| | Green | 23 | 63.3 | 17.2 | 2.2 | 3.4 | 13.9 | .0 |
| | Other | 9 | 59.6 | 26.2 | 8.6 | .0 | 5.6 | .0 |
| | Unsure | 70 | 56.5 | 4.3 | 2.9 | 8.8 | 16.7 | 10.8 |



2014-499 – OMA –TRACKING SURVEY – STAT SHEET – DRAFT

Question 3 – As you may know, the provincial government is responsible for paying fees to doctors so that they can provide services to patients. [ROTATE] Some people believe that the provincial government should increase the fees that it pays to doctors so that Ontario can attract more doctors, while others believe that the provincial government should hold the line on the fees it pays because doctors are already paid a lot of money. Which of those statements, if either, best reflects your opinion?

| | | Total | The provincial government should increase the fees it pays doctors so that Ontario can attract more doctors | The provincial government should hold the line on the fees it pays because doctors are already paid a lot of money | Unsure |
|--------------|-----------------|-----------|---|--|------------|
| | | Responses | Percentage | Percentage | Percentage |
| | Ontario 2014-05 | 500 | 45.9 | 41.2 | 12.9 |
| Gender | Male | 250 | 43.2 | 47.0 | 9.7 |
| | Female | 250 | 48.5 | 35.4 | 16.1 |
| | | | | | |
| Age | 18 to 29 | 102 | 35.7 | 46.4 | 17.9 |
| | 30 to 39 | 88 | 53.6 | 42.9 | 3.6 |
| | 40 to 49 | 106 | 38.0 | 45.1 | 16.9 |
| | 50 to 59 | 86 | 52.7 | 33.9 | 13.4 |
| | 60 plus | 117 | 51.1 | 37.3 | 11.6 |
| | | | | | |
| Vote Profile | Liberal | 162 | 50.1 | 37.0 | 12.9 |
| | PC | 134 | 31.9 | 56.4 | 11.6 |
| | NDP | 102 | 57.8 | 31.9 | 10.3 |
| | Green | 23 | 33.6 | 45.5 | 20.9 |
| | Other | 9 | 57.5 | 36.9 | 5.6 |
| | Unsure | 70 | 48.0 | 34.8 | 17.2 |



2014-499 – OMA –TRACKING SURVEY – STAT SHEET – DRAFT

| | | Question 4 – Would you say that healthcare is an important, somewhat important, somewhat unimportant or unimportant issue for you personally? | | | | | |
|--------------|-----------------|---|------------|--------------------|----------------------|-------------|------------|
| | | Total | Important | Somewhat important | Somewhat unimportant | Unimportant | Unsure |
| | | Responses | Percentage | Percentage | Percentage | Percentage | Percentage |
| Gender | Ontario 2014-05 | 500 | 87.9 | 6.9 | 2.2 | 2.6 | .5 |
| | Male | 250 | 81.2 | 10.2 | 2.7 | 5.2 | .6 |
| | Female | 250 | 94.5 | 3.4 | 1.7 | .0 | .4 |
| Age | 18 to 29 | 102 | 85.7 | .0 | 7.1 | 7.1 | .0 |
| | 30 to 39 | 88 | 82.1 | 12.5 | 1.8 | 1.8 | 1.8 |
| | 40 to 49 | 106 | 93.0 | 5.6 | .0 | 1.4 | .0 |
| | 50 to 59 | 86 | 87.5 | 8.9 | 1.8 | 1.8 | .0 |
| | 60 plus | 117 | 89.7 | 8.2 | .4 | .9 | .9 |
| Vote Profile | Liberal | 162 | 93.1 | 2.8 | .5 | 2.3 | 1.3 |
| | PC | 134 | 77.2 | 11.6 | 4.5 | 6.3 | .4 |
| | NDP | 102 | 92.9 | 6.3 | .0 | .8 | .0 |
| | Green | 23 | 84.1 | 15.9 | .0 | .0 | .0 |
| | Other | 9 | 91.4 | 8.6 | .0 | .0 | .0 |
| | Unsure | 70 | 89.4 | 4.7 | 5.9 | .0 | .0 |



2014-499 – OMA –TRACKING SURVEY – STAT SHEET – DRAFT

| | | Question 5 – If a provincial party had a strong platform on healthcare, would you be more likely, less likely, or would it have no impact on your likelihood to vote for that party? | | | | |
|--------------|-----------------|--|-------------|-------------|------------|------------|
| | | Total | More likely | Less likely | No impact | Unsure |
| | | Responses | Percentage | Percentage | Percentage | Percentage |
| | Ontario 2014-05 | 500 | 67.6 | 4.5 | 21.1 | 6.8 |
| Gender | Male | 250 | 61.3 | 5.2 | 27.4 | 6.1 |
| | Female | 250 | 73.9 | 3.8 | 14.8 | 7.4 |
| | 18 to 29 | 102 | 78.6 | .0 | 21.4 | .0 |
| Age | 30 to 39 | 88 | 64.3 | 1.8 | 23.2 | 10.7 |
| | 40 to 49 | 106 | 76.1 | 5.6 | 14.1 | 4.2 |
| | 50 to 59 | 86 | 57.1 | 8.0 | 26.8 | 8.0 |
| | 60 plus | 117 | 60.5 | 6.9 | 21.5 | 11.2 |
| Vote Profile | Liberal | 162 | 78.0 | 4.0 | 9.0 | 9.0 |
| | PC | 134 | 51.0 | 8.9 | 33.1 | 7.1 |
| | NDP | 102 | 72.8 | 3.0 | 19.7 | 4.5 |
| | Green | 23 | 59.4 | .0 | 31.4 | 9.1 |
| | Other | 9 | 94.4 | .0 | 5.6 | .0 |
| | Unsure | 70 | 67.0 | 1.4 | 26.9 | 4.7 |



2014-499 – OMA –TRACKING SURVEY – STAT SHEET – DRAFT

| | | Question 6 – For this provincial election do you think there should be less of a focus on healthcare, more of a focus on healthcare, or is the current focus on healthcare just about right? | | | | |
|--------------|-----------------|--|-----------------|-----------------|-----------------------------------|------------|
| | | Total | Less of a focus | More of a focus | Current focus is just about right | Unsure |
| | | Responses | Percentage | Percentage | Percentage | Percentage |
| | Ontario 2014-05 | 500 | 6.9 | 44.3 | 42.7 | 6.1 |
| Gender | Male | 250 | 11.0 | 32.6 | 51.8 | 4.5 |
| | Female | 250 | 2.9 | 55.9 | 33.5 | 7.7 |
| Age | 18 to 29 | 102 | 14.3 | 25.0 | 53.6 | 7.1 |
| | 30 to 39 | 88 | 5.4 | 46.4 | 37.5 | 10.7 |
| | 40 to 49 | 106 | 5.6 | 43.7 | 47.9 | 2.8 |
| | 50 to 59 | 86 | 4.5 | 50.0 | 41.1 | 4.5 |
| | 60 plus | 117 | 4.7 | 55.8 | 33.5 | 6.0 |
| Vote Profile | Liberal | 162 | 4.6 | 49.5 | 41.3 | 4.7 |
| | PC | 134 | 11.2 | 38.5 | 47.1 | 3.2 |
| | NDP | 102 | 6.1 | 47.3 | 39.8 | 6.8 |
| | Green | 23 | 10.3 | 46.8 | 37.4 | 5.6 |
| | Other | 9 | .0 | 34.4 | 57.0 | 8.6 |
| | Unsure | 70 | 5.2 | 39.3 | 41.5 | 14.0 |