



Pharmacare in Canada:

A Quantitative Study of Canadian Attitudes and Preferences

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August 2018

Methodology

Methodology:	Online survey
Sample:	N=4,173 adult Canadians
Field window:	July 27 – August 3, 2018
Reliability:	Online samples cannot officially be assigned a margin of error. As a guideline*, a probability sample of this size carries a margin of error of $\pm 1.5\%$, 19 times out of 20. The margin of error is larger for sub-segments. Although flexible demographic and regional quotas were employed to ensure reliable and comparable sub-segment analysis, the data was weighted by current gender, age, & region Census data, to ensure the sample reflects the actual population of adult Canadians.

Region	Number of interviews	Margin of error*
Atlantic Canada	714	$\pm 3.7\%$
Quebec	613	$\pm 4.0\%$
Ontario	812	$\pm 3.4\%$
Manitoba	505	$\pm 4.4\%$
Saskatchewan	495	$\pm 4.4\%$
Alberta	514	$\pm 4.3\%$
British Columbia	520	$\pm 4.3\%$
Canada	4,173	$\pm 1.5\%$

Executive Summary

- **When asked, most Canadians express high and intense support for a national universal prescription drug program.** However, the key finding emerging from this dataset is that **this is conceptual support in principle – and not support for a universal pharmacare program that will replace existing private and government plans.**
- **Public engagement on this policy/issue is low.** It is not a top-of-mind policy or health care priority for Canadians. The public do not have a clear top-of-mind notion of the specifics of how pharmacare would be executed or the coverage it would provide.
 - Thus, there exists **a clear opportunity to define the issue – and the term itself.**
- When engaging Canadians on the specifics of a national prescription drug program, the following attitudes and preferences are revealed:
 - Although the public is supportive of the concept of providing prescription drug coverage to all Canadians, pharmacare is ranked **a lower, less urgent, and less deserving priority than most other health care and non-health care issues tested in the survey.**
 - Most importantly, **when asked for their preferred approach for such a program, only 30% preferred a universal approach that replaced existing plans. A majority (56%) prefer an approach that maintains existing plans and** either exclusively focusses on providing coverage to those without a plan (20%) or covers those without a plan and allows those with a plan to bill their insurer first and the government second (35%).
 - This conviction is likely rooted in the high levels of satisfaction that current drug plan members have with their plan.
 - Although about half of Canadians feel pharmacare can save costs and increase drug choice, **at least seven-in-ten Canadians are concerned** about the execution of the program - specifically, the government's ability to administer it effectively and efficiently (87%), the increased cost to government budgets (79%), and replacing their drug plan with a public plan that would have reduced choice (72%). The threat of income tax and payroll deduction increases also raises doubts about the program in the minds of about four-in-ten Canadians.

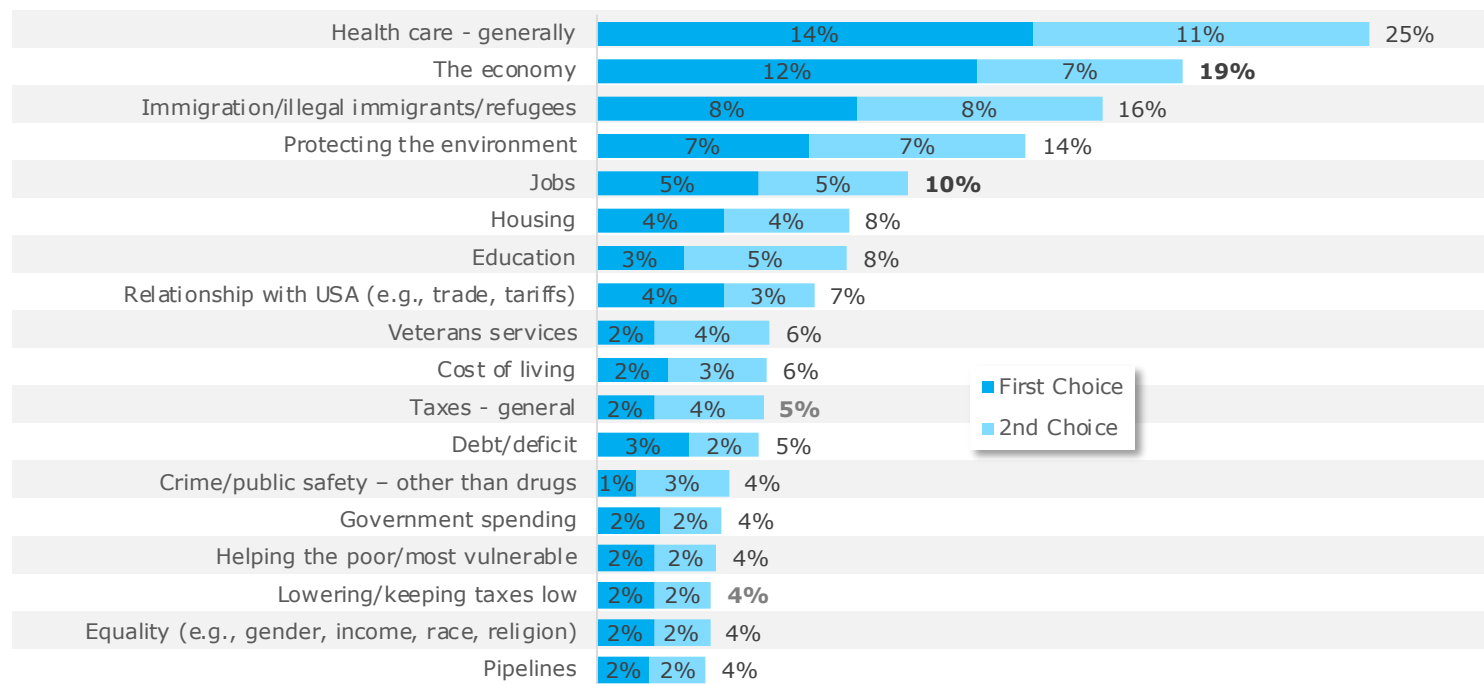


Context: Health Care Priorities

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Most important top-of-mind issue: Health care (25%) receives top mention – slightly more mention the related issues of the economy (19%) and jobs (10%)

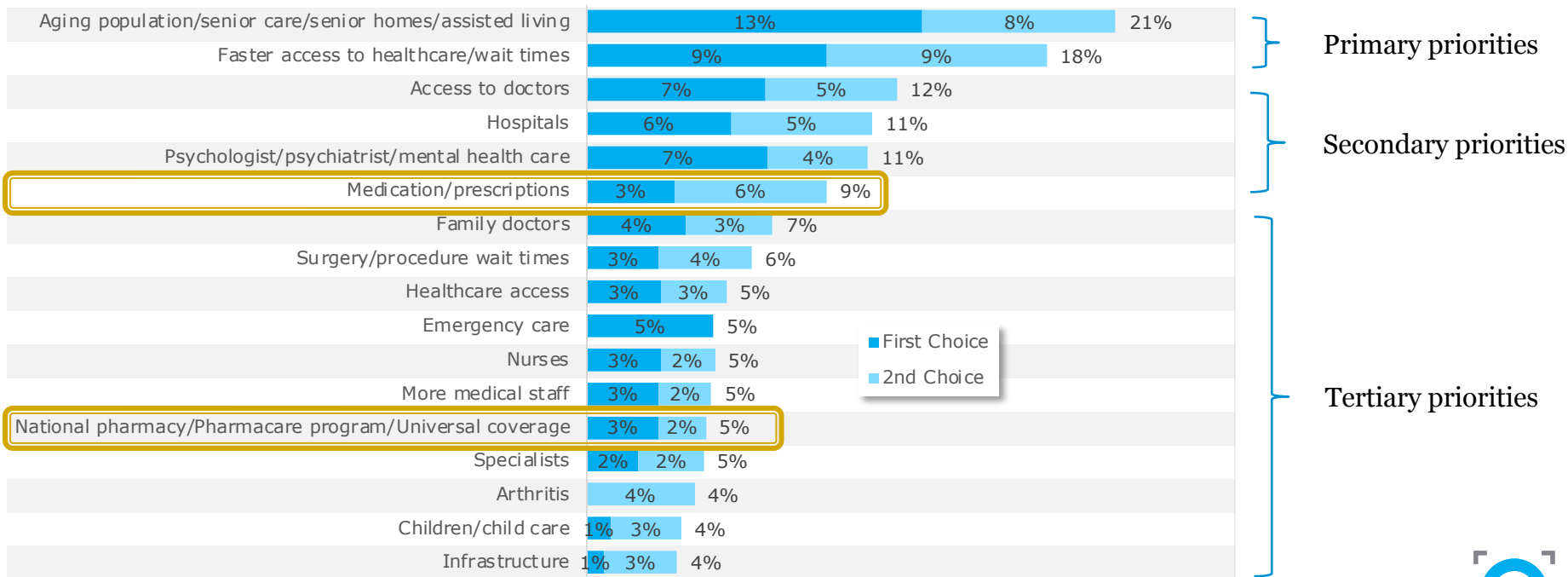
- A total of 9% mention taxes and lowering taxes.



NOTE: Responses less than 4% on top 2 choices not shown
 Q9. Thinking about some issues facing Canada today, what are the TWO most important to you? [OPEN-ENDED] (Base: N=4173)

Most important top-of-mind health care priorities: Universal prescription drug coverage is not a top-of-mind priority

- Top-of-mind, the challenges of an aging population and improving access are considered the most critical health care issues.
- While prescription drugs are a secondary priority (9%), the access side and coverage side of this equation is a much lower top-of-mind priority (5%).



NOTE: Responses less than 4% on top 2 choices not shown

Q.11 And what would you say are the two most important health care priorities that deserve additional attention and funding? [OPEN-ENDED] (Base: N=4173)

Pharmacare is a tertiary top-of-mind health care priority across all regions

- The priority level of health care issues varies somewhat by region, with BC most concerned about an aging population, Ontario prioritizing mental health, and the Atlantic focused on access. However, pharmacare is a tertiary priority everywhere – it is not top-of-mind compared to other issues. 1st choice and 2nd choice results are consistent across the regions.

1 st Choice		B.C.	Alb	Sask	Man	Ont	Que	Atl
Aging population/senior care/senior homes/assisted living	13%	19%	17%	17%	12%	10%	13%	12%
Faster access to healthcare/wait times	9%	9%	13%	7%	9%	10%	8%	9%
Psychologist/psychiatrist/mental health care	7%	5%	7%	6%	3%	12%	2%	4%
Access to doctors	7%	8%	4%	7%	4%	5%	5%	24%
Hospitals	6%	4%	4%	3%	4%	9%	3%	3%
Emergency care	5%	-	5%	3%	7%	4%	11%	1%
Family doctors	4%	2%	-	1%	1%	2%	10%	5%
Medication/prescriptions	3%	5%	5%	6%	8%	3%	1%	5%
Cancer	3%	2%	4%	4%	3%	2%	4%	4%
Healthcare access	3%	1%	2%	2%	1%	3%	5%	3%
Nurses	3%	2%	1%	1%	1%	4%	3%	3%
Surgery/procedure wait times	3%	7%	5%	8%	4%	1%	1%	2%
More medical staff	3%	2%	2%	1%	4%	2%	5%	2%
National pharmacy/Pharmacare program/Universal coverage	3%	3%	4%	5%	4%	3%	-	5%
Specialists	2%	3%	1%	2%	3%	2%	2%	2%
Dental care/coverage	2%	2%	1%	1%	-	3%	1%	2%

NOTE: Responses less than 2% on Total not shown

Q.11 And what would you say are the two most important health care priorities that deserve additional attention and funding? (Base: N=4173)

Pharmacare is a tertiary top-of-mind health care priority regardless of drug plan type

- There is some difference in health care priorities by plan. However, prescription medication and pharmacare are not a top priority for members of any plan type. Those with a government or no plan are more likely to mention pharmacare, but it remains a much lower priority than aging population, wait time, doctor access, mental health, and hospital concerns.

1 st Choice	Employer	Affinity Plan	Govt	RAMQ	None	Unsure
Aging population/senior care/senior homes/assisted living	13%	8%	18%	10%	14%	4%
Faster access to healthcare/wait times	10%	7%	5%	10%	11%	10%
Psychologist/psychiatrist/mental health care	7%	5%	11%	3%	5%	11%
Access to doctors	6%	7%	11%	5%	6%	6%
Hospitals	6%	5%	3%	4%	7%	6%
Emergency care	5%	7%	4%	10%	2%	7%
Family doctors	4%	4%	2%	13%	2%	2%
Medication/prescriptions	3%	2%	6%	1%	5%	5%
Cancer	3%	2%	3%	4%	2%	4%
Healthcare access	3%	4%	1%	4%	2%	-
Nurses	3%	3%	2%	3%	2%	2%
Surgery/procedure wait times	3%	2%	3%	1%	3%	5%
More medical staff	3%	3%	1%	6%	1%	1%
National pharmacy/Pharmacare program/Universal coverage	2%	4%	4%	1%	5%	2%
Specialists	3%	3%	1%	3%	1%	-
Dental care/coverage	1%	4%	2%	1%	3%	1%

NOTE: Responses less than 2% on Total not shown

Q.11 And what would you say are the two most important health care priorities that deserve additional attention and funding? (Base: N=4173)

While many support pharmacare, it ranks as a lower, less urgent priority than many other wait time and access issues – esp. the universal variant

- Almost 8-in-10 report some level of support for a limited pharmacare program . Support is strongest in Atlantic Canada.
- Support for a universal prescription drug coverage requiring a government subsidy for all prescription drugs is the lowest-ranked health care priority among those tested. Alberta and Quebec find this the least appealing while Atlantic Canada is most in favour.

Support Overall (Somewhat/Strongly)	B.C.	Alb	Man	Sask	Ont	Que	Atl	
Reducing wait times for surgeries	26%70%95%	96%	94%	96%	94%	95%	94%	96%
Providing better access to mental health services	33%60%93%	89%	91%	92%	95%	94%	93%	96%
Reducing wait times for MRIs and other diagnostic services	28%64%93%	92%	92%	94%	92%	93%	93%	96%
Investment in long-term beds for seniors and the chronically ill	37%53%90%	90%	90%	94%	91%	89%	91%	93%
Investing in more beds in hospitals	38%51%89%	89%	85%	87%	86%	92%	86%	92%
Investing in palliative care, hospices, and end-of-life care	43%46%89%	88%	89%	92%	91%	86%	90%	93%
Investing in home care services	45%43%88%	89%	87%	91%	91%	86%	89%	92%
Providing prescriptions to Canadians who don't have drug coverage	35%44%79%	79%	76%	78%	79%	84%	70%	87%
Providing equal health to First Nations communities	35%44%79%	78%	72%	70%	74%	83%	77%	85%
Providing dental care to Canadians who don't currently have dental coverage	35%43%78%	77%	74%	75%	71%	78%	79%	84%
Ensuring all Canadians receive equal drug coverage by having gov'n't pay for all Rx drugs	30%38%69%	75%	61%	76%	72%	70%	63%	74%

For Canadians, “universality” is about everyone having same quality and access, not about who buys

- Canadians interpret “universality” to mean that a service is available to all and that the quality of health care is consistent. Only about a quarter consider “universality” to be tied to the funding source. Simply put, they define it in terms of the What not the How.
- “Universality” also does not appear to be strongly linked to denying privatized access to health care.

	Overall	B.C.	Alb	Man	Sask	Ont	Que	Atl
Everyone receives the same kind and quality of health care	 62%	64%	65%	61%	65%	61%	63%	61%
Everyone has access to the health service covered	 55%	58%	54%	56%	52%	61%	47%	52%
Everyone's costs are covered by health insurance, whether through government or employer plans	 29%	31%	31%	30%	26%	29%	29%	26%
The government pays for the health service covered	 25%	23%	28%	28%	27%	26%	21%	26%
No one can buy their way to better or faster health care	 23%	22%	25%	21%	26%	27%	15%	25%
None of the above	 4%	4%	3%	5%	4%	3%	6%	5%

In terms of health care principles, Canadians prioritize the What over the How – that is, equal access and equal quality health care over funding sources

- Just as Canadians define “universal” as equal access to services and equal quality care, these are also the principles that are most important to them.
- The entity that subsidizes health care, and the ability to buy private services, are of far lower concern.

	Overall	B.C.	Alb	Man	Sask	Ont	Que	Atl
Everyone receives the same kind and quality of health care	 39%	36%	43%	46%	39%	36%	40%	41%
Everyone has access to the health service covered	 24%	29%	21%	22%	24%	23%	22%	28%
Everyone's costs are covered by health insurance, whether through government or employer plans	 17%	15%	18%	17%	16%	18%	18%	14%
The government pays for the health service covered	 9%	10%	6%	8%	10%	11%	8%	7%
No one can buy their way to better or faster health care	 8%	7%	10%	4%	7%	9%	7%	7%
None of the above	 4%	3%	3%	2%	3%	3%	5%	3%

Universal access to prescription drugs is considered as important or more important as access to other services.

- A full 2/3 feel that prescription drug coverage should fall under their definition of “universal”.
- While mental health services are a higher priority, universal access to prescription drugs is considered as important as universal access to long-term care, and more important than the other types of care tested.
- Feelings on this are particularly strong in BC, Manitoba, Saskatchewan and the Atlantic while Quebec is less convinced.

	Overall	B.C.	Alb	Man	Sask	Ont	Que	Atl
Mental health services	73%	76%	69%	79%	75%	75%	69%	78%
Prescription drugs	66%	75%	64%	76%	73%	66%	58%	77%
Long-term care	66%	70%	68%	75%	69%	65%	60%	74%
Dental care	63%	68%	63%	65%	57%	63%	62%	65%
Home care	57%	59%	60%	67%	64%	53%	58%	64%
Prescription eyewear	52%	50%	54%	57%	54%	52%	49%	57%
Physiotherapy	45%	49%	43%	52%	51%	44%	44%	49%
None of the above	5%	3%	7%	3%	4%	4%	6%	3%

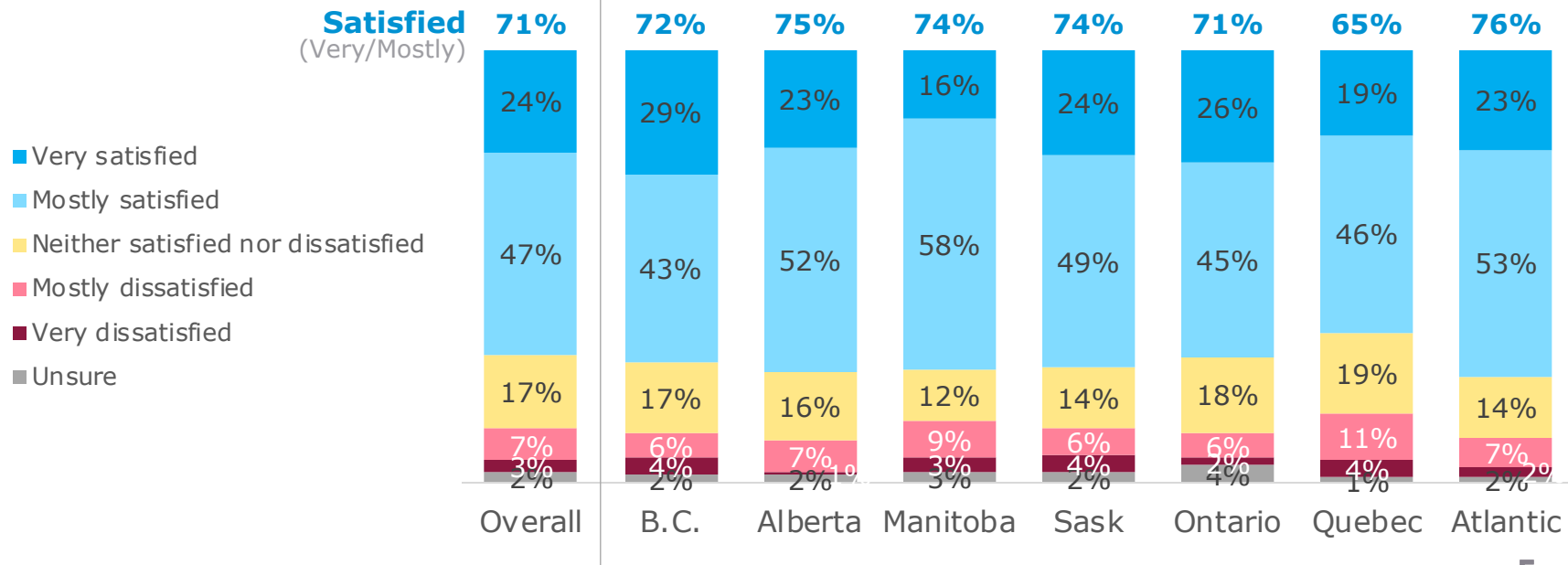


Context: Drug Plan Membership & Satisfaction



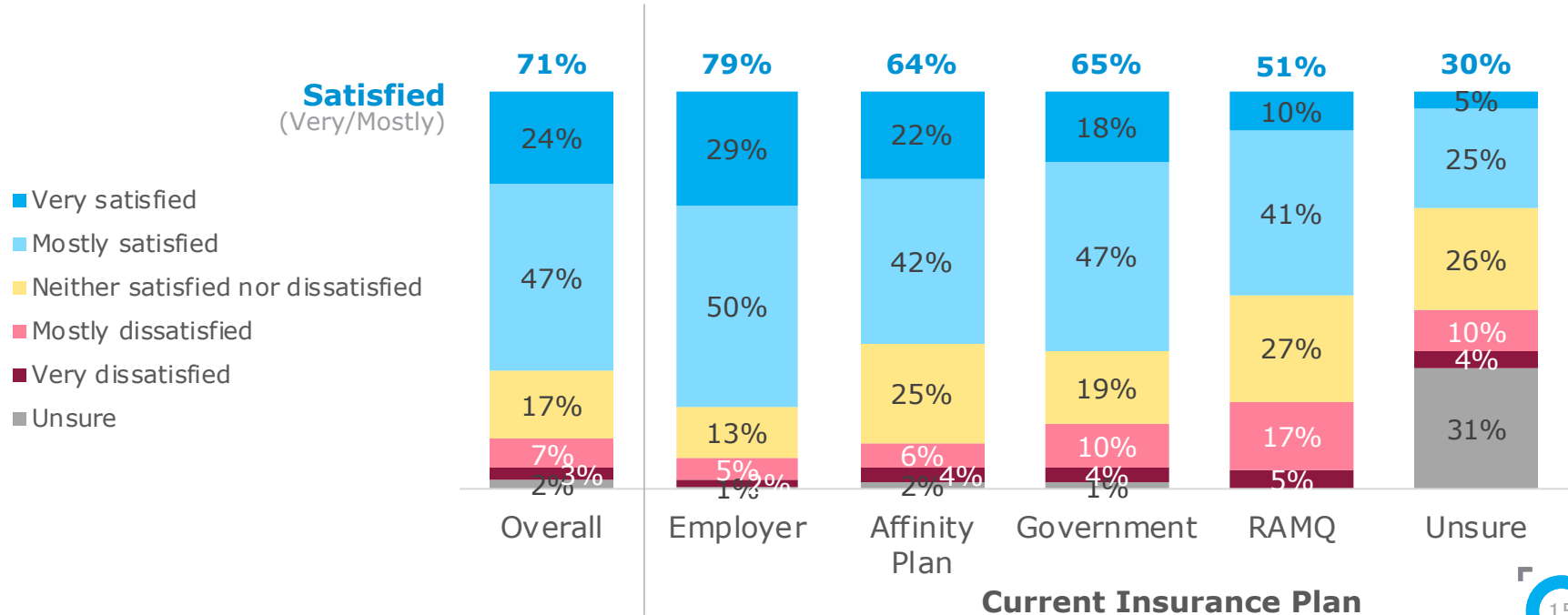
Seven-in-ten drug plan members are satisfied with their plan – just 10% are dissatisfied.

- Satisfaction with current drug plan is relatively high, with between 2/3 and 3/4 reporting satisfaction.
- About 10% report dissatisfaction.
- Those in Quebec are the least satisfied while those in the Atlantic are the most satisfied.



Employer drug plan members are more satisfied than affinity and government plan members

- More than six-in-ten members are satisfied with their employer, affinity, and government-based drug plans, but employer plan members are clearly more satisfied. At 51% satisfaction, RAMQ plan users are the least satisfied.
- Those who are unsure of the source of their drug plan appear to have low engagement with their plan, as 31% cannot provide a rating – which results in the lowest satisfaction rating. However, just 14% are dissatisfied.



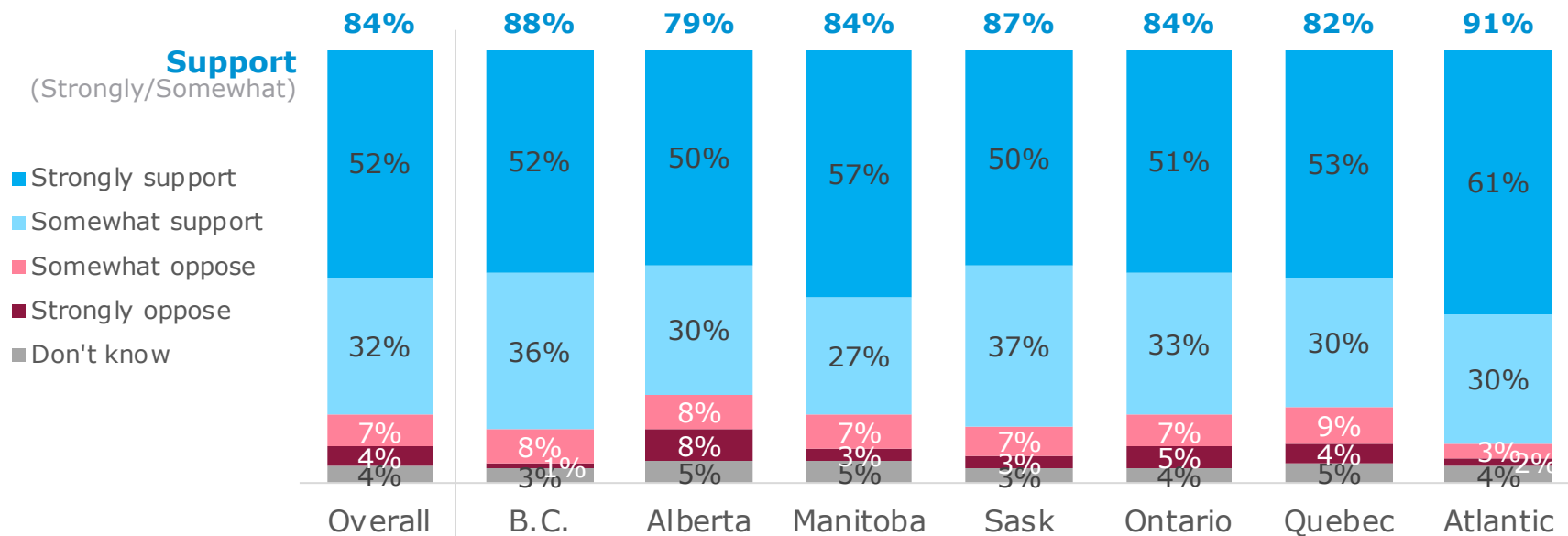


Pharmacare: Support, Approach Preferences, & Concerns

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At first blush, support-in-principle for a national universal prescription drug program is high, intense.

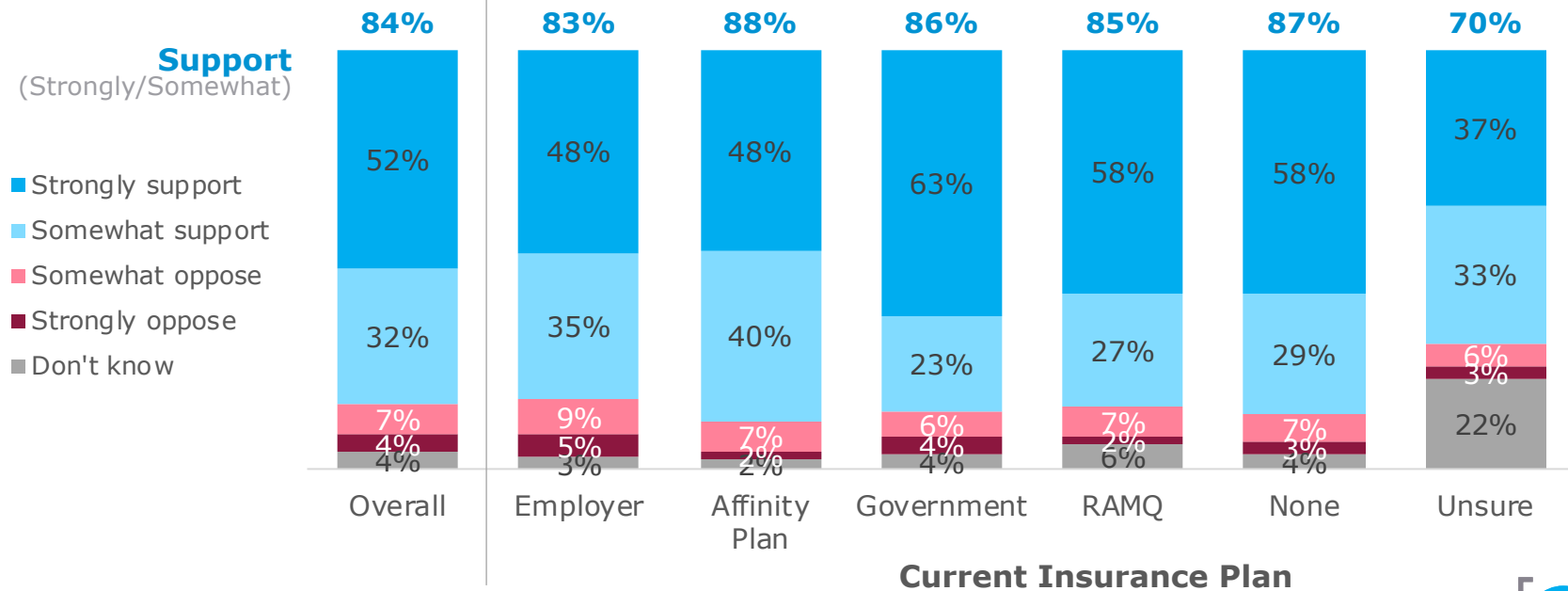
- Support is relatively consistent across the provinces, however, it is highest in the Atlantic and somewhat lower in Alberta.



Q33. As you may know, there is some discussion about creating a **national universal prescription drug coverage program** that would make sure **all Canadians have access to the prescription medications they need**. Generally speaking, do you support or oppose the idea of a national universal prescription drug coverage program that would provide all Canadians access to the prescription medications they need? (Base: N=4173)

Conceptual support for the program is high, regardless of current drug plan type.

- Support for a pharmacare plan is high, regardless of current plan type.
- However, those who currently have a government plan are more likely to be expressing “hard support” (top box).
- The small proportion who are unsure of their current plan are the most likely to report that they are uncertain.



However, when considering pharmacare approaches, only 30% prefer a universal plan that replaces existing plans.

- While support for a pharmacare plan as general concept is high, Canadians are divided on their preferred approach. Only 30% of Canadians favour a universal plan that replaces all existing plans. Support is strongest in Manitoba and Quebec, weakest in Alberta. 55% prefer an approach where current plan members continue to be covered by their plan, with the new pharmacare plan focussed upon covering those without a plan – this majority segment is divided between those that want an exclusive non-plan focus (20%) vs. a co-pay focus (35%). Another 15% prefer an extreme/expensive coverage focus only.

Overall		B.C.	Alb	Man	Sask	Ont	Que	Atl
Those covered by private insurance plans will continue to bill their insurer first and government second. Those who are not covered by private insurance will receive their prescriptions for free from the government	 35%	36%	31%	35%	29%	40%	30%	35%
A new national universal prescription drug coverage program should cover all Canadians and replace all existing government and private insurance plans	 30%	31%	25%	35%	30%	27%	35%	32%
Universal prescription drug coverage should only cover those Canadians who are not currently covered through some other existing government or private plan	 20%	22%	22%	16%	21%	19%	20%	22%
Universal prescription drug coverage should only focus on those Canadians facing extreme circumstances (e.g. catastrophic drug coverage; covering expensive drugs for rare diseases)	 15%	11%	22%	14%	21%	14%	16%	11%

Q34. While many Canadians want enhanced access to medications, many Canadians are also concerned about the cost of a national universal prescription drug coverage program, losing their private drug plans, and the ability of governments to administrate drug plans effectively.
Which approach to the universal prescription drug coverage comes closest to your view? (Base: N=4173)

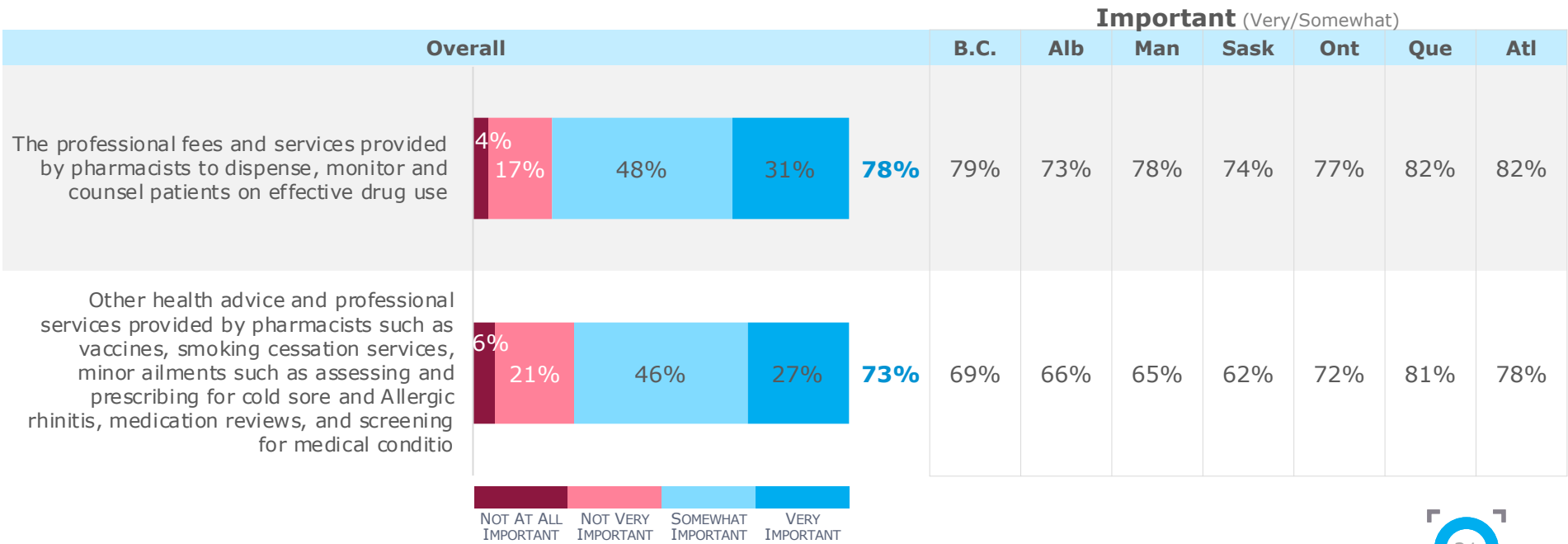
Pluralities of employer, affinity, and government plan members prefer a co-pay approach. Those without a plan are split between co-pay and uncovered focus.

- There is minor preference variance by current drug plan.
- Notably, RAMQ users are split between a universal (35%) and co-pay (30%) approach.

Overall		Employer	Affinity Plan	Govt	RAMQ	None	Unsure
Those covered by private insurance plans will continue to bill their insurer first and government second. Those who are not covered by private insurance will receive their prescriptions for free from the government	 35%	36%	41%	39%	30%	29%	27%
A new national universal prescription drug coverage program should cover all Canadians and replace all existing government and private insurance plans	 30%	29%	32%	28%	35%	31%	34%
Universal prescription drug coverage should only cover those Canadians who are not currently covered through some other existing government or private plan	 20%	18%	15%	23%	21%	29%	16%
Universal prescription drug coverage should only focus on those Canadians facing extreme circumstances (e.g. catastrophic drug coverage; covering expensive drugs for rare diseases)	 15%	18%	11%	9%	15%	11%	23%

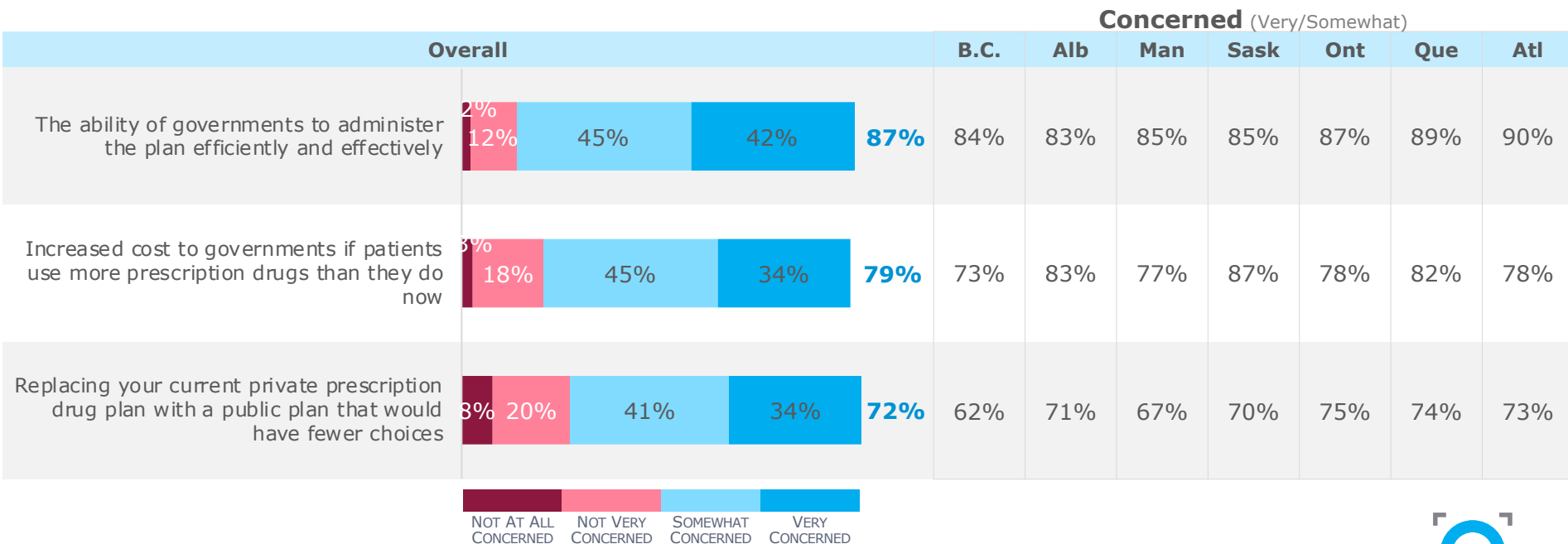
Three-quarters feel it is important that pharmacare cover all pharmacist fees and services.

- Most Canadians find it important that the plan also cover professional fees for pharmacists as well as other health advice and professional services provided by pharmacists. Opinion varies somewhat by region, with Alberta expressing somewhat lower majority support on coverage of both areas. In terms of other health advice/professional services, there is a divide between the West (softer support) and the East (stronger support), with Ontario taking a middle ground.



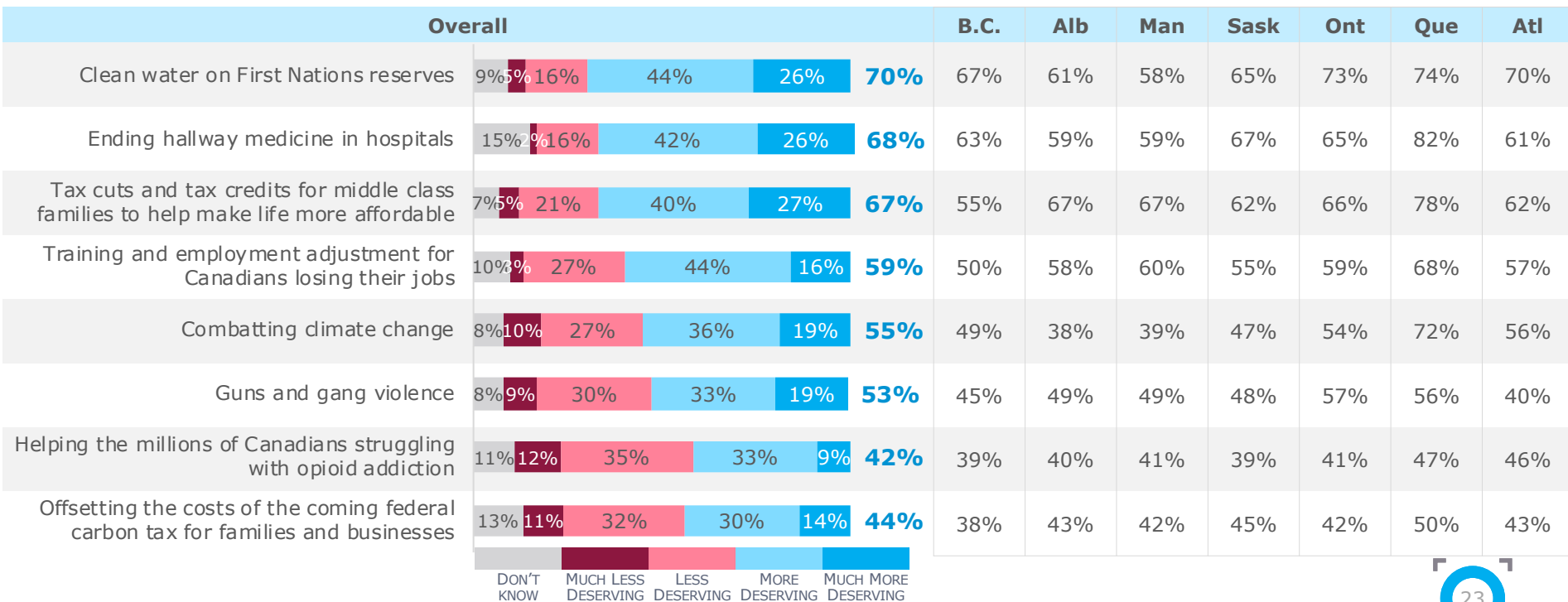
At least seven-in-ten Canadians have concerns about pharmacare execution: govt admin (87%), increased costs to govt (79%), and reduced drug choice (72%)

- Despite many expressing conceptual support in principle for a universal prescription drug coverage program, there are significant concerns about how it will be executed. The highest level of concern relates to the government's ability to administer the program. However, there is also significant concern about the impact of the program costs on government budgets and whether or not it would impact access to certain prescription drugs.
- Those in BC appear a little less concerned than others, while those in Saskatchewan are more concerned than average about the cost of the program.



While Canadians support a pharmacare program of some kind, they feel it is a lesser funding priority than almost all policy areas tested

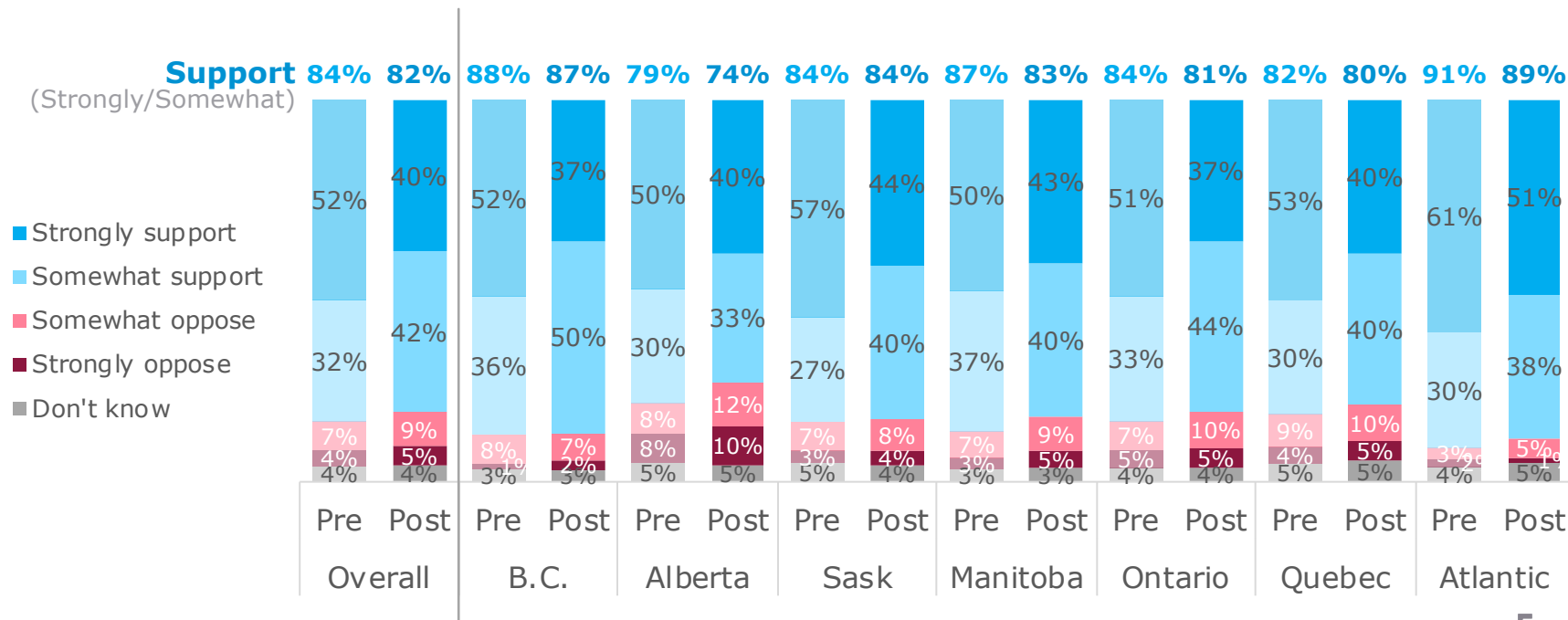
- Despite support for a national universal prescription drug coverage program, many feel that most other initiatives are more deserving of funding. All issues except for opioid addiction assistance and offsetting the carbon tax impact are seen to be more deserving of federal funding than pharmacare.



Q44. For each item, please tell me whether you think is more or less deserving of federal government funding than a new national universal prescription drug coverage policy. (Base: N=4173)

Post-discussion, conceptual support for pharmacare in principle remains steady overall (-2), but intense support declines significantly (-12).

- Conceptual support for pharmacare in principle remains steady, although moderated. Opposition increases just 3 points. However, specific questions about program specifics clearly reveals that a majority of the public prefers an approach that maintains existing programs.





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