

Long-Term Care Awareness and Perception Survey

Prepared for:
Ontario Long Term Care Association

Section 1

Overview

Objectives and
methodology

Objectives

The Ontario Long Term Care Association has conducted a survey in 2020 to understand the knowledge and perception levels of Ontarians related to long-term care homes in Ontario.



Determining how informed Ontarians are about long-term care homes

To determine how informed Ontarians are about operational and policy challenges impacting long-term care homes in Ontario.



Exploring perceptions regarding the long-term care sector

To explore the perceptions of Ontarians regarding the long-term care sector, segmented by key demographic, socioeconomic, political, and informational variables.



Understanding policy measures supported by Ontarians

To identify how Ontarians align on policy issues and to identify groups of Ontarians that could potentially align with the campaign objectives.



Methodology

This survey was designed in collaboration with the OLTCA. The objective of the survey was to query for knowledge and perception levels of Ontarians. To ensure an accurate panel, the survey contained a qualifying question region of residence – those who did not identify as Ontarians were discarded.

The survey was composed of a battery of 41 questions including demographic indicators. The survey was fielded by our survey partners to their online representative panel between **September 8th, 2020 to September 12th, 2020**. We gathered a total of **1,003 complete and valid responses from residents of Ontario, representative of the general Ontario population.**

We conducted a comprehensive exploratory data analysis exercises to identify key trends. We also designed and ran thorough modelling exercises, to determine causal linkages. More specifically, we measured how knowledge of the long-term care sector, demographic and socio-economic factors, and political preferences impact Ontarians' opinions of the long-term care sector.

Through this report, we highlight key factors that predict how receptive different groups of Ontarians might be to specific campaign messages.

Section 2

Insights

Major themes and insights
from the Study

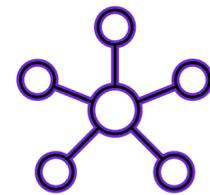
Key Statistics

- **86%** of Ontarians report following the news about long-term care homes in Ontario during the pandemic.
- **43%** of Ontarians mistakenly believe long-term care homes are also called retirement homes.
- Only **28%** of Ontarians believe most seniors in long-term care homes in Ontario do not require intensive care.
- **87%** of Ontarians believe that all long-term care homes are understaffed.

Key Statistics

- **53%** of Ontarians agree that the government should take over the day-to-day management of long-term care homes in Ontario.
- **80%** of Ontarians agree that the pandemic has shown that long-term care homes in Ontario do not function effectively and need to be completely overhauled.
- **73%** of Ontarians agree that long-term care homes in Ontario have been consistently underfunded.
- **47%** of Ontarians do not agree that Long-term care homes in Ontario are doing their best to provide effective and safe care to residents.

Key Findings



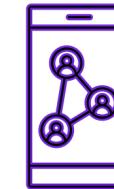
A majority of Ontarians have had limited exposure or experience with long-term care homes.

Most Ontarians have not had, do not currently have, or do not plan on having family members in long-term care homes.



Ontarians have varying levels of knowledge about long-term care homes.

While 87% of Ontarians are aware of staffing challenges, alarmingly only 41% are informed on the difference between retirement homes and intensive care needs.



Social media platforms offer a viable channel to inform and engage with Ontarians.

While 64% of Ontarians rely on news media websites for news, other media sources, and media platforms offer unique target audiences.



Ontarians are divided on who should be responsible for long-term care ownership.

Although 79% of Ontarians agree that the provincial government is responsible for care, Ontarians are unsure of public/private ownership and funding levels required.



Perception of long-term care homes varies depending on the topic.

Positive perception varies from high agreement regarding the need for increased provincial government funding (86%) to low agreement regarding levels of care currently seen in Ontario (25%).



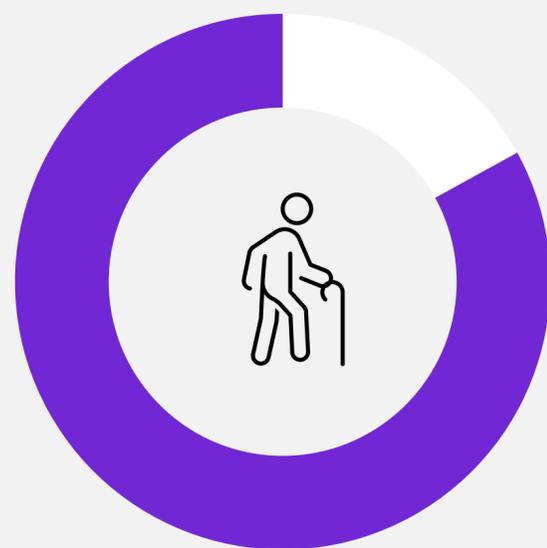
Ontarians' knowledge levels about certain topics are causally linked to their perception of long-term care homes.

Targeting indicators based on socioeconomic, informational, political, and demographic variables highlight unique audiences present for messaging.

Most Ontarians have not interacted with the long-term care system. Over 40% are unsure about future needs.



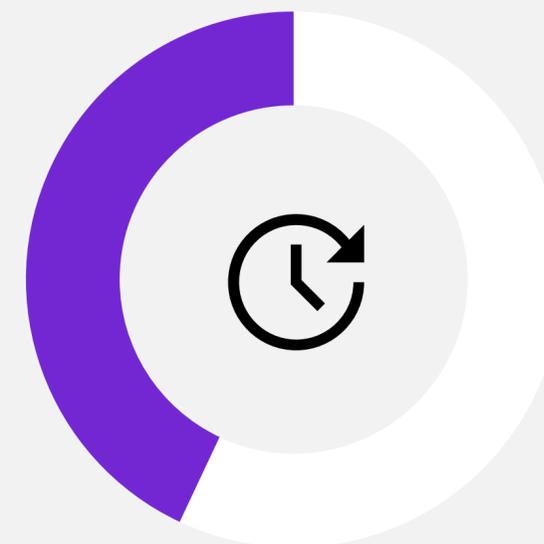
73% Have not had a family member reside in a long-term care home in the last 5 years.



83% Do not currently have a family member residing in a long-term care home.



95% Do not currently have a family member on the waiting list for a long-term care home.

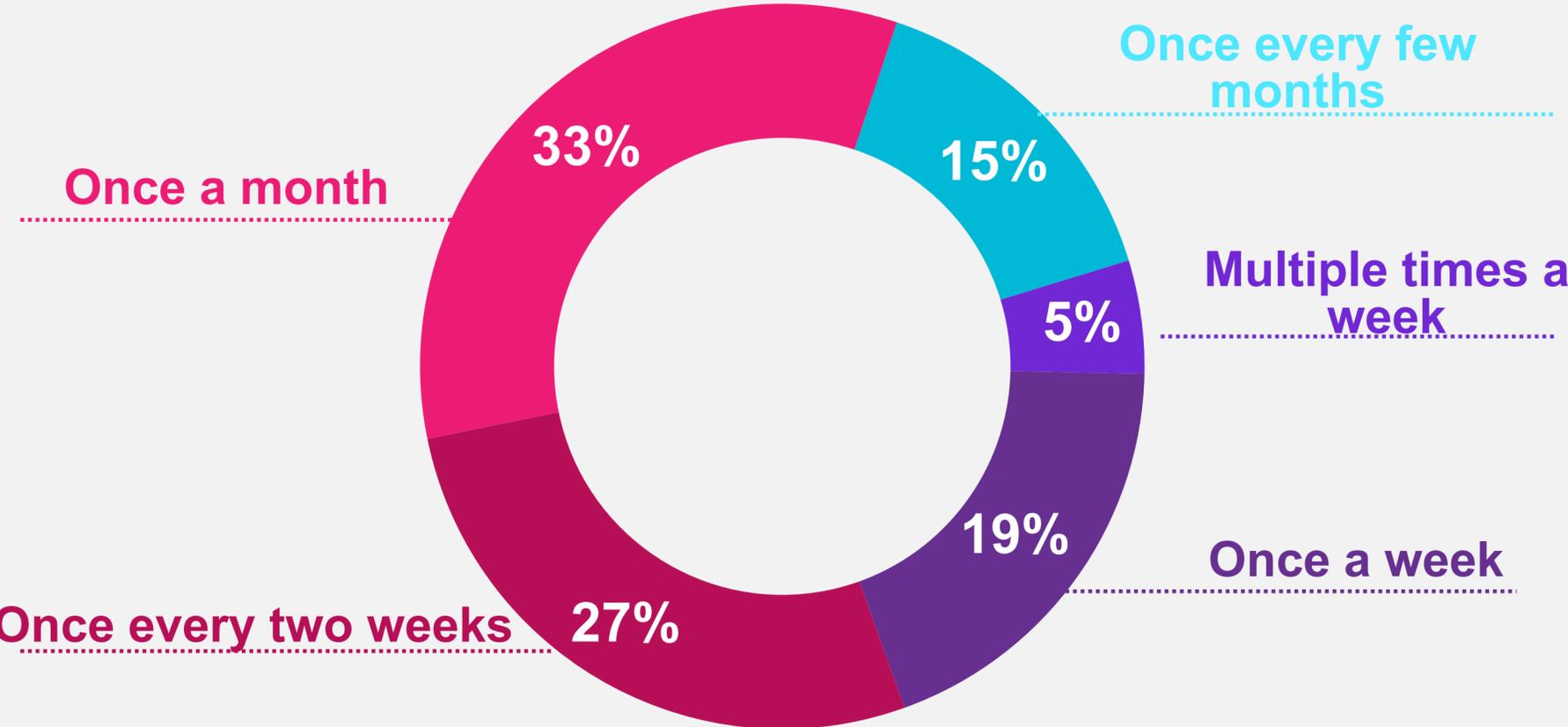


43% Are unsure if they anticipate family members who may need to reside in long-term care home in the next five years.

*Survey question: Do you currently have any family members who reside in a long-term care home?
In the past five years, have you had any family members who reside in a long-term care home?
In the next five years, do you anticipate having family members who might need to reside in a long-term care home?*

Most are divided on how often they think Ontarians should visit their family in long-term care homes.

Perceived reasons why there is a difference between how often Ontarians should and do visit their loved ones:



- 1** 31% believe that families may want to compensate for lack of visitation during the COVID-19 lockdown period
 - 36% of Liberal supporters believe this
 - 18% of Green supporters believe this
 - 37% of low-income earners (<\$50,000) believe this
- 2** 34% believe business or laziness contribute
 - 41% of NDP supporters believe this
 - 53% of Green supporters believe this
 - 29% of Liberal supporters believe this

Survey question: How often do you think Ontarians do visit their family members in long-term care homes?

Ontarians are well informed on certain issues, but a substantial portion of Ontarians are unaware of key details.

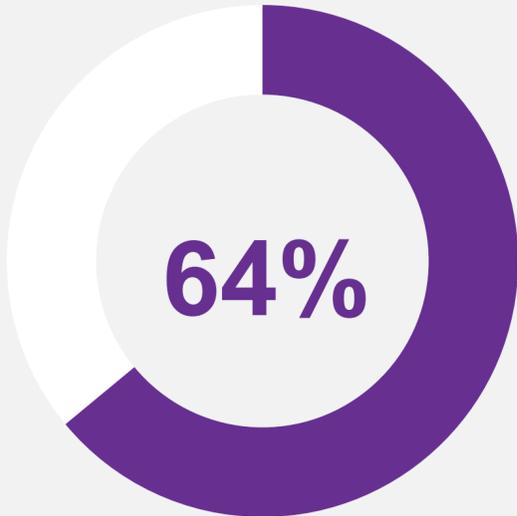
Although 86% of Ontarians have been following the news on LTC homes during the COVID-19 pandemic, their knowledge on LTC-related issues is varied:

| Statement | % Correct | % Unsure | % Incorrect |
|--|-----------|----------|-------------|
| Correctly identified homes are understaffed | 87% | 10% | 3% |
| Correctly identified that not all residents receive private rooms | 78% | 11% | 11% |
| Correctly identified that residents require more than minimal care | 76% | 16% | 8% |
| Correctly identified that waitlists for LTC were longer than 30 days | 72% | 25% | 3% |
| Correctly identified that most LTC homes have not been renovated | 72% | 21% | 7% |
| Correctly identified that there is a mixed-ownership model in the industry | 71% | 19% | 10% |
| Correctly identified that placement is dependent on care need, not open to all seniors | 67% | 21% | 12% |
| Correctly identified that LTC is reliant upon provincial funding | 59% | 26% | 15% |
| Correctly identified that LTC homes are not the same as retirement homes | 41% | 16% | 43% |
| Correctly identified that residents in LTC require intensive daily care. | 41% | 31% | 28% |

Demographics affect how informed Ontarians are:

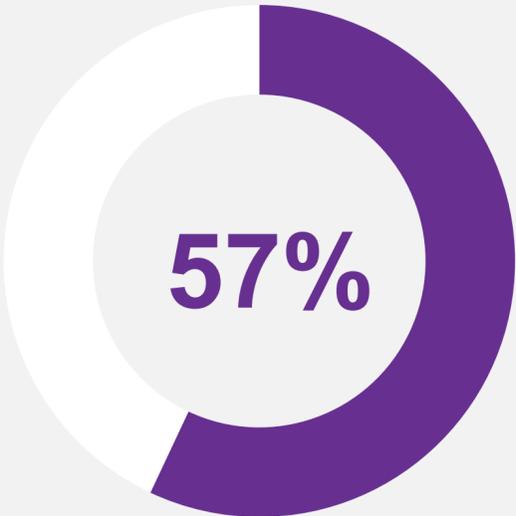
- University graduates are on average 10% more informed than high school graduates
- High income earners are on average 8% more informed than low income earners
- Baby Boomers are on average 11% more informed than Gen Z's and Millennials

Most Ontarians rely on news media websites, social media, and TV to keep up to date with the news, which could impact their perceptions.



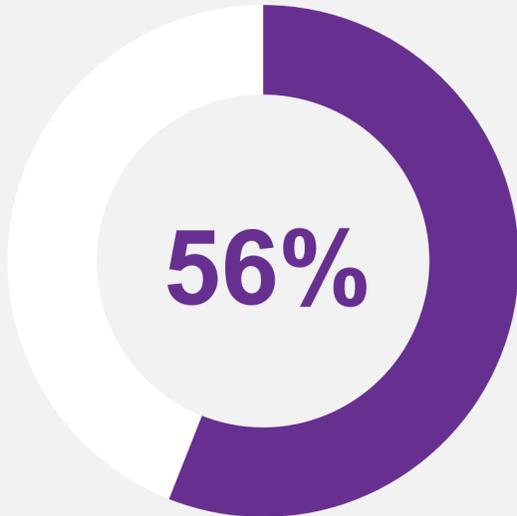
News media websites

Key Audiences: Millennials and Gen X (71%), University educated Ontarians (77%), High income earners (74%), NDP supporters (72%)



Social media

Key Audiences: Gen Z and Millennials (70%), University educated Ontarians (62%)



TV

Key Audiences: Baby Boomers (70%), High school educated Ontarians (60%), Conservative (60%), Liberal (63%) supporters

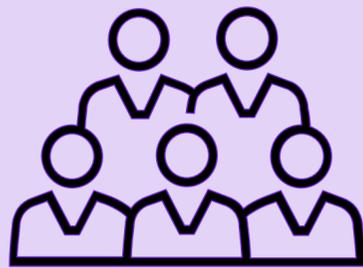


Radio

Key Audiences: University educated Ontarians (40%), High income earners (43%)

Survey question: Which sources do you normally use to keep up-to-date with the news?

The most read news media publications are CBC, CTV News, and Toronto-based sources.



49% CBC News

Key Audiences: Gen Z and Millennials (58%), University educated Ontarians (62%), Liberal (68%), NDP (64%), and Green Party (62%) supporters

44% CTV News

Key Audiences: Baby Boomers (48%), Conservative supporters (48%), High school educated Ontarians (49%), Low income earners (48%)

29% CP24

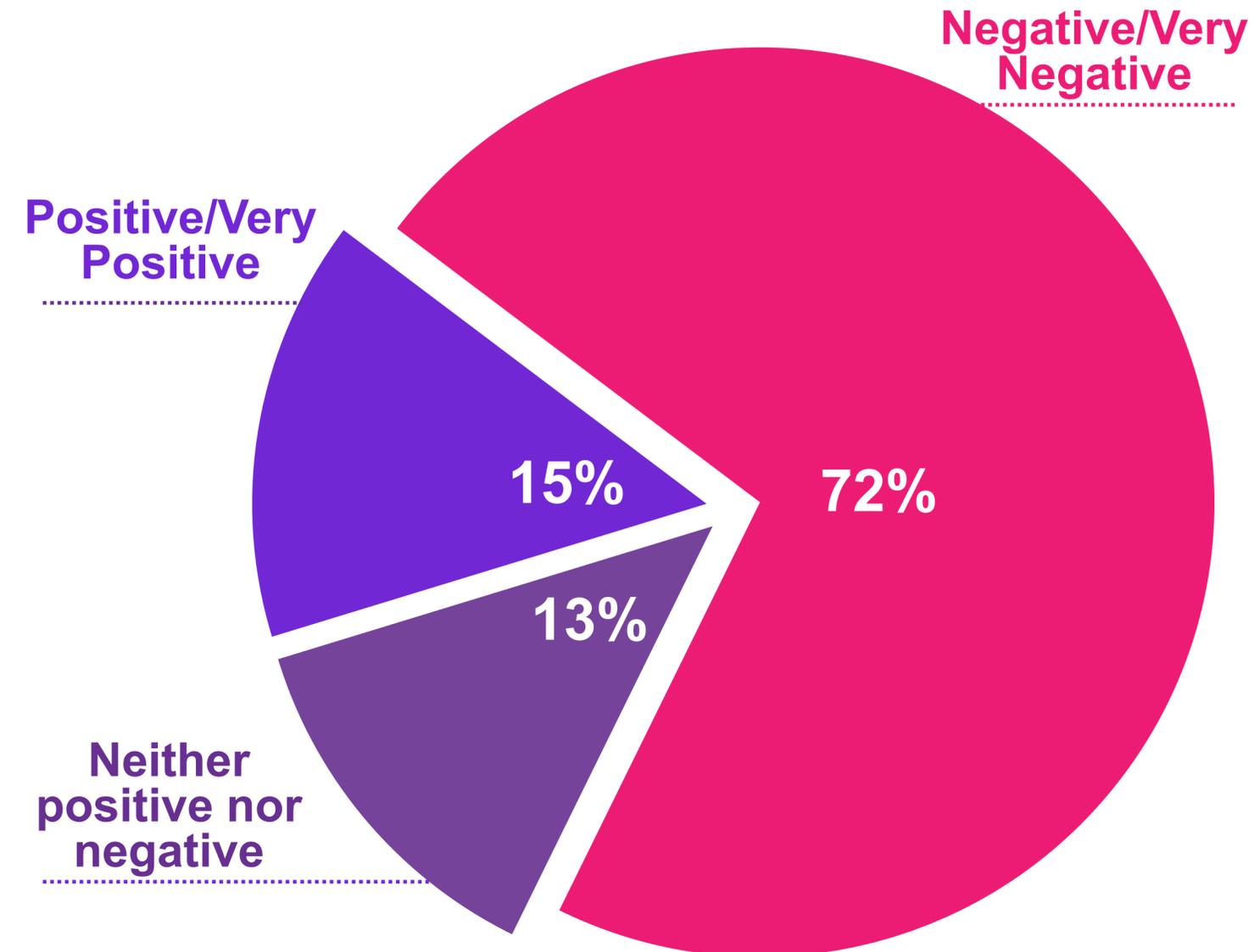
Key Audiences: High school educated Ontarians (34%), Conservative supporters (31%)

23% Toronto Star

Key Audiences: University educated Ontarians (29%), Liberal (33%), NDP (30%), and Green Party (28%) supporters

Survey question: From the list below, please select the three media publications that you read most often.

Over two-thirds of Ontarians have a negative perception of the long-term care sector.



Survey question: Generally, what is your view of long-term care homes?



Ontarians with a Positive/Very Positive perception of LTC homes:

- 21% of College/Trade school educated Ontarians
- 19% of Green Party supporters



Ontarians with a Negative/Very Negative perception of LTC homes:

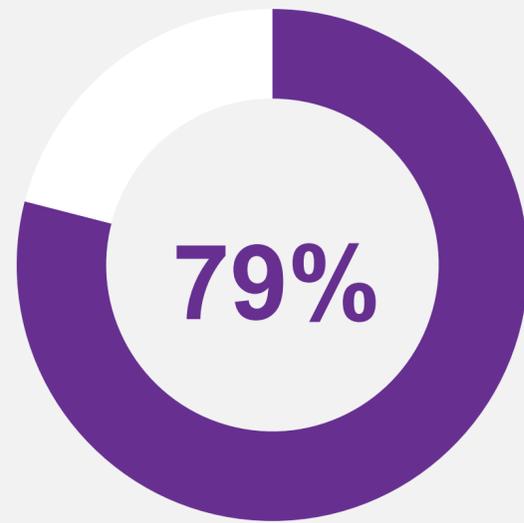
- 80% of University educated Ontarians
- 77% of NDP supporters, with 54% having a **very negative** perception
- 77% of middle-income earners (\$50,000-\$100,000)



Ontarians with a neutral perception of LTC homes:

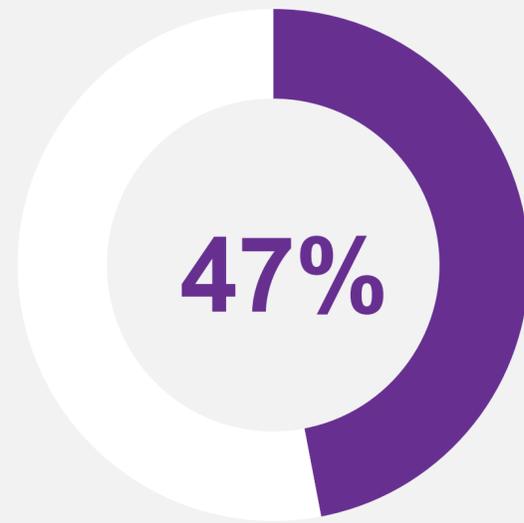
- 17% of High School educated Ontarians
- 16% of low income earners (<\$50,000)
- 23% of Green Party supporters

Most Ontarians believe that the provincial government is responsible for providing good, high-quality long-term care.



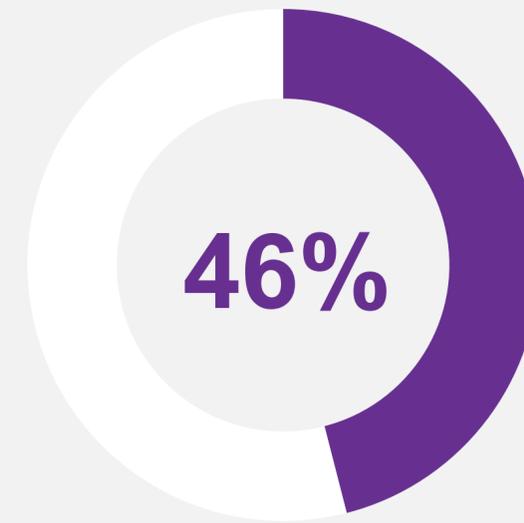
Provincial Government

Key Audiences: University educated Ontarians (86%), middle income earners (83%), Liberal (87%), NDP (85%), and Green Party (89%) supporters



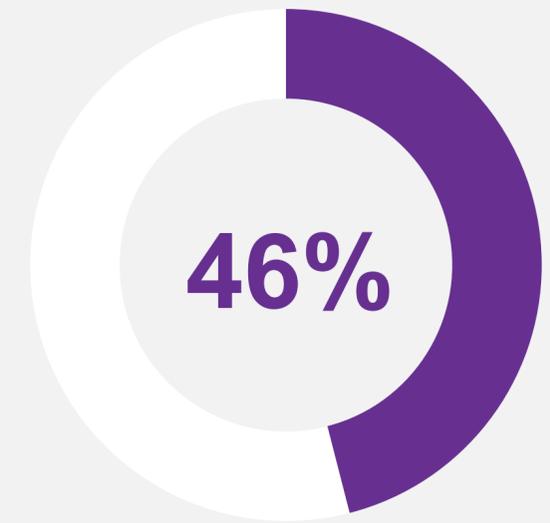
Federal Government

Key Audiences: High school educated Ontarians (53%), NDP supporters (53%)



Industry

Key Audiences: Gen Z and Millennials (52%), High income earners (50%)



Health care providers

Key Audiences: High school educated Ontarians (50%), NDP (51%) and Green Party supporters (53%)

Survey question: Who do you think is responsible for providing good, high-quality long-term care in Ontario? Please select all options that you think apply.

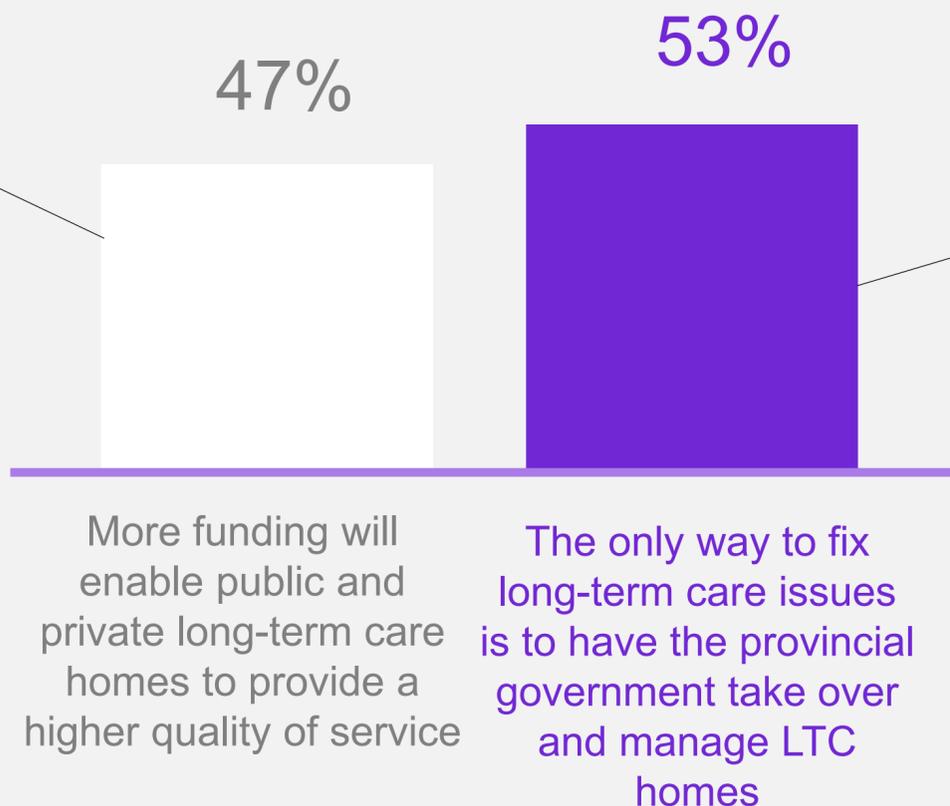
Ontarians are divided on the public/private ownership status of long-term care homes.

Ontarians who agree with this statement:

- 55% of Gen Z and Millennials
- 52% of College/Trade Educated Ontarians
- 53% of High-income earners
- 54% of Conservative supporters

Ontarians who agree with this statement:

- 54% of Gen X
- 58% of Baby Boomers
- 57% of High school educated Ontarians
- 59% of Low-income earners
- 58% of Liberal supporters
- 64% of NDP supporters



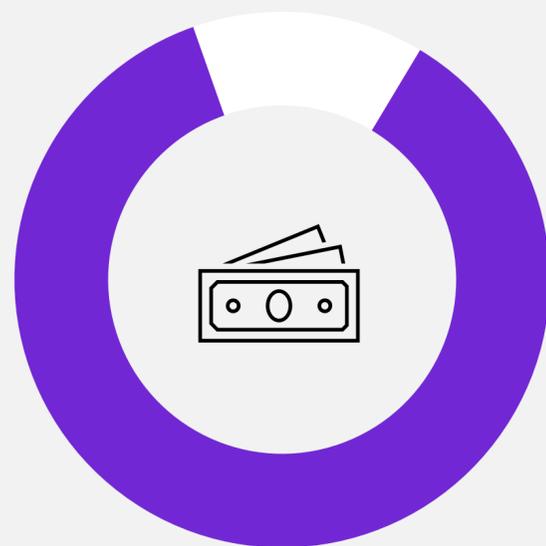
Survey question: This question presents two scenarios and asks which one is closest to your own point of view. Two fictional people are used to illustrate different views. We recognize that sometimes, the two choices provided may not exactly line up with your preferences. However, we ask that you choose a persona that is closest to your preferences.

Section 2

Perception Insights

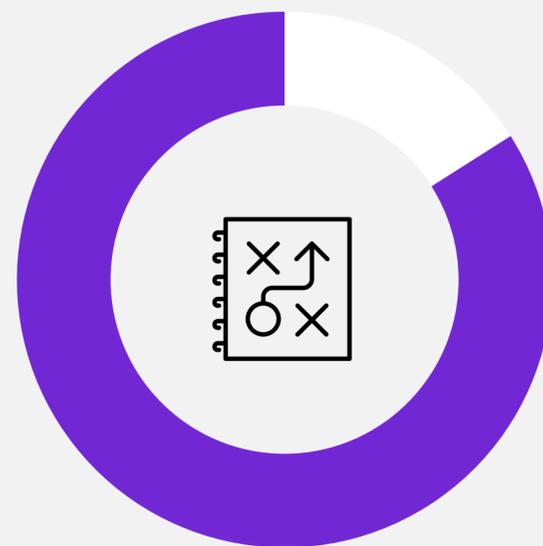
In-depth perception
insights and trends

Most Ontarians support messages focused on long-term care sector funding, operational risks, and consumer choice.



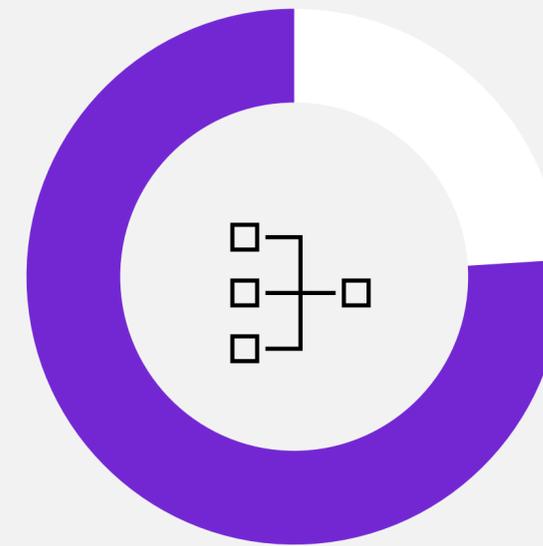
86%

Agree that the provincial government should provide adequate funding to long-term care homes in Ontario so that they can serve senior citizens' needs across the province.



84%

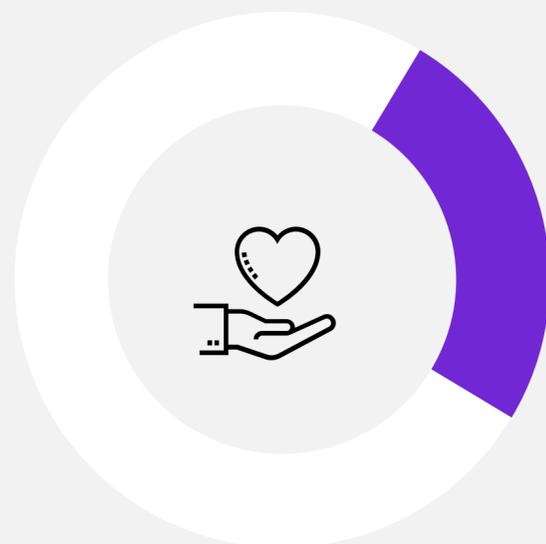
Agree that the pandemic has shown that long-term care homes in Ontario do not function effectively and need to be completely overhauled.



76%

Agree that Ontarians should be able to choose the type of long-term care home they prefer. As such, all types of homes, including private long-term care homes should be available to Ontarians.

Only 25% of Ontarians believe that the long-term care homes are doing their best. They are divided on whether the government should take over or make more funding available.



25%

Agree that long-term care homes in Ontario are doing their best to provide effective and safe care to residents.



53%

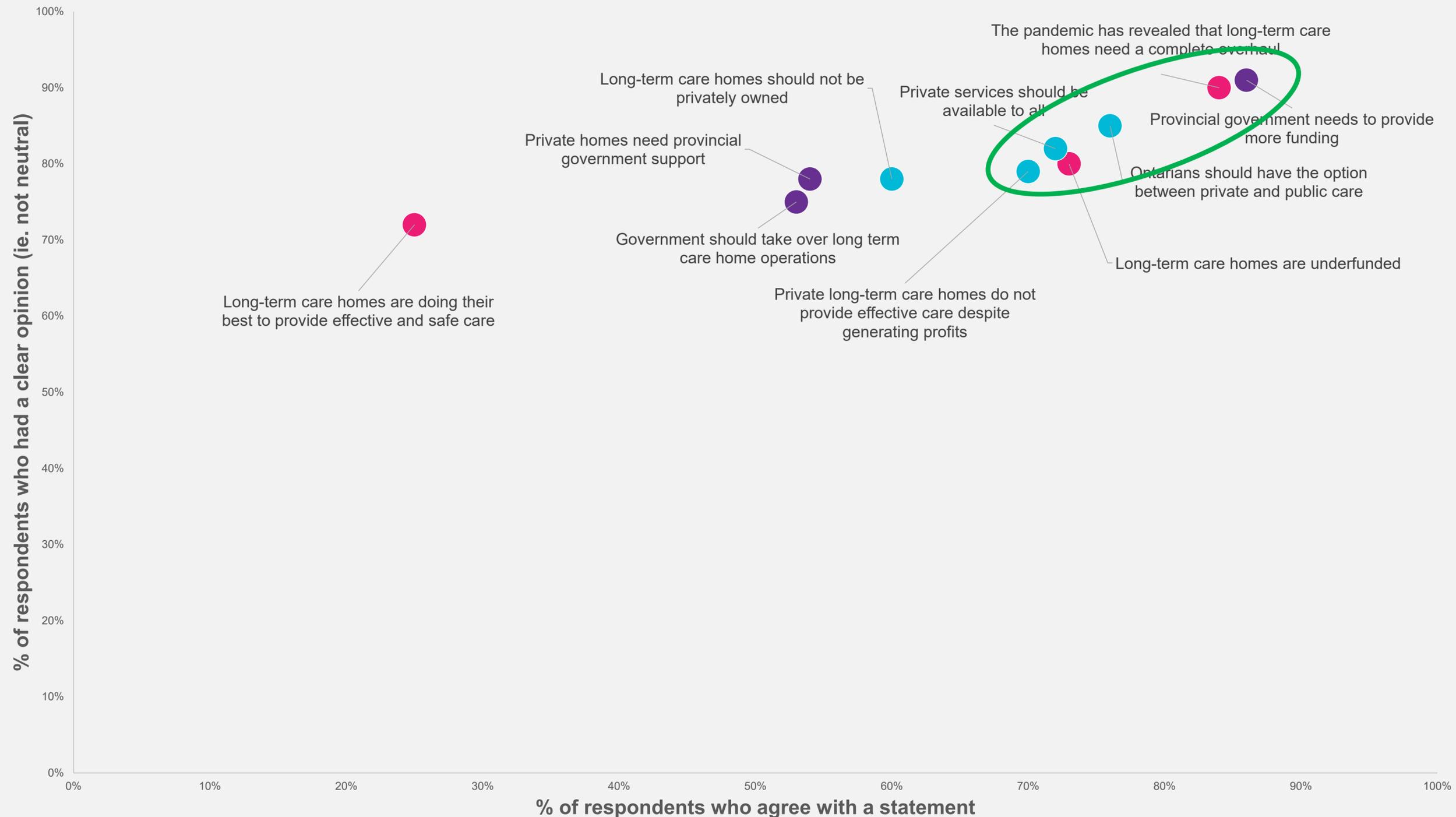
Agree that the government should take over the day-to-day management of long-term care homes in Ontario.



54%

Agree that private long-term care homes need provincial government support to provide services to more seniors in Ontario.

Most Ontarians believe that increased government funding or a system overhaul are needed to improve care in long-term care homes

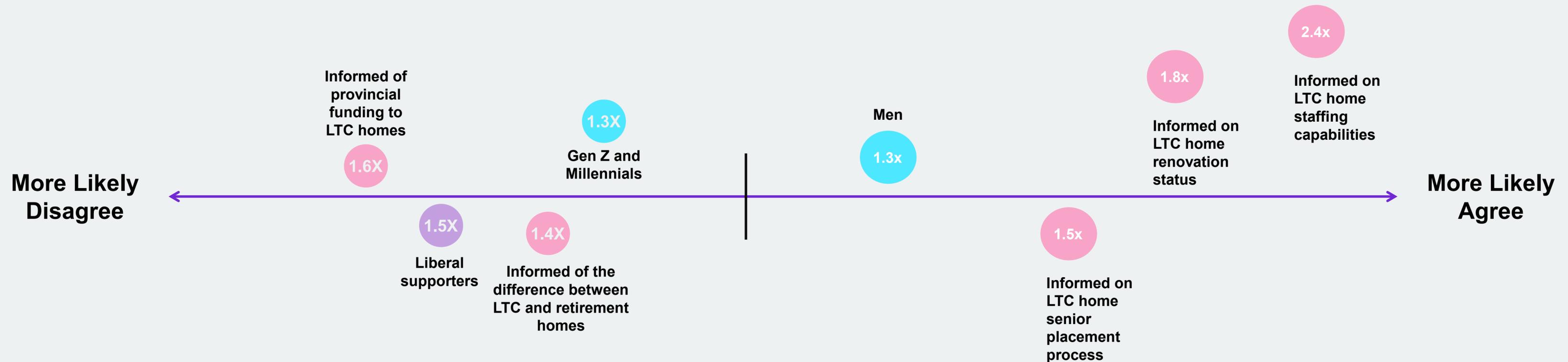


Survey question: Please rate how strongly you agree or disagree with the following statements.

CONFIDENTIAL – NOT FOR DISTRIBUTION

Ontarians that are informed about LTC homes' staffing constraints are most likely to hold a sympathetic view of long-term care homes.

“Long-term care homes are doing their best to provide effective and safe care.”



● Socioeconomic Indicators ● Informational Indicators ● Political Indicators ● Demographic Indicators

Survey question: Please rate how strongly you agree or disagree with the following statements.

CONFIDENTIAL – NOT FOR DISTRIBUTION

**crestview
strategy**

Thank you