

Innovative Research Group, Inc.

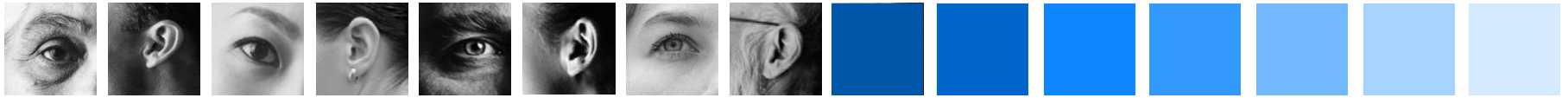
www.innovativeresearch.ca

Toronto :: Vancouver



Ontario Telephone Omnibus ▶▶

Attitudes Towards Naturopathic Medicine



Prepared for:

Canadian College of Naturopathic Medicine

- & -

Ontario Association of Naturopathic Doctors



Awareness, Impressions and Usage

Familiarity with the practice of naturopathic medicine appears to have increased in Ontario over the past 5 years.

- Just over 4-in-10 Ontarians (43%) say they are at least somewhat familiar with naturopathic medicine. Women and those residing in the GTA appear to be most familiar with the practice.
- 3-in-10 (29%) say they have heard of the practice, but know very little about it.
- Only 26% of Ontarians say they have not heard of naturopathic medicine; down from 35% in 2006.

Among Ontarians who have at least heard of naturopathic medicine, over 7-in-10 (72%) have a positive impression of the practice.

- Among those who have heard of naturopathic medicine, females, GTA residents and younger Ontarians are more likely to have a positive impression of the practice.

Among Ontarians who have heard of Naturopathic Medicine, nearly a quarter (24%) have seen an ND for treatment [or an estimated 18% of all Ontarians have seen an ND at some point in their lives].

- Traditionally, ND patients are more likely to reside in the GTA, have higher incomes and be female.
- In terms of estimated past usage:
 - 20% of all GTA residents have seen an ND for treatment vs. 16% for the rest of Ontario;
 - 28% of all Ontarians with a household income over \$120k have seen an ND for treatment vs. 17% for those who have a household income under \$120k; and
 - 22% of all Ontario women have seen an ND for treatment vs. 13% of men.

Ontarians who have seen an ND for treatment largely do so due to the natural approach to health and wellness.

- Two-thirds (67%) of Ontarians, who have seen an ND in the past for treatment, say their primary reason for their last visit was because they were “*seeking a more natural approach to health and wellness*”.



Impact, Future Demand and Beliefs

Impact of naturopathic medicine on healthcare ▶▶

Ontarians feel having a naturopathic doctor has reduced their use of the healthcare system in the following ways:

- Nearly 3-in-10 (28%) Ontarians with an ND feel it has either significantly or noticeably reduced their **use of prescription medication**.
- A quarter (25%) of Ontarians with an ND feel it has either significantly or noticeably reduced their **visits to their family doctor or general practitioner**.
- Just under 2-in-10 (19%) Ontarians with an ND feel it has either significantly or noticeably reduced their **visits to the hospital**.
- 18% of Ontarians with an ND feel it has either significantly or noticeably reduced their **visits to medical specialists**.

Forecasting Demand ▶▶

4-in-10 (41%) Ontarians say they are likely to see a naturopathic doctor in the next few years.

- Those most likely to see an ND in the coming few years are women and younger Ontarians.

Among Ontarians who say they are likely to see a naturopathic doctor in the next few years, over half (56%) say they are likely to visit in the next 12 months.

- Again, women are more likely than men to visit in the next 12 months (65% vs. 44%, respectively) and those residing in the GTA metrobelt (67%).
- In terms of estimated future usage, 23% of all Ontarians say they are likely to visit an ND for treatment in the next 12 months.

Beliefs about Naturopathic Medicine ▶▶

A majority of Ontarians (57%) believe naturopathic medicine is leading to better healthcare outcomes for those who use it.

- Younger Ontarians are most likely to hold this belief.

Methodology

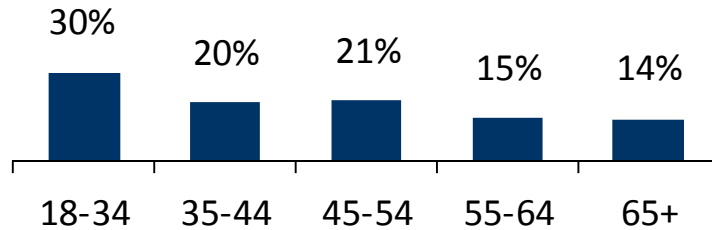
- This study was conducted by **Innovative Research Group** through random digit dialing telephone interviews among a representative sample of 606 Ontarians, 18 years of age or older.
- The interviews were conducted between August 17th and August 23rd, 2011. Up to eight call-backs were made in the case of non-response.
- Using 2006 Statistics Canada Census data, the results were weighted to n=600 according to region, age, and gender to ensure a sample representative of the entire Ontario adult population.
- The margin of error on a sample of n=606 is $\pm 4.0\%$, 19 times out of 20.
- The margin of error will be larger within each sub-grouping of the sample.

Note: *Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

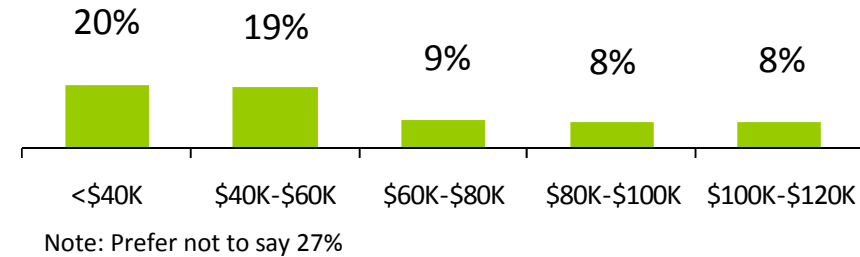


Demographic Segmentation: *Respondent Profile*

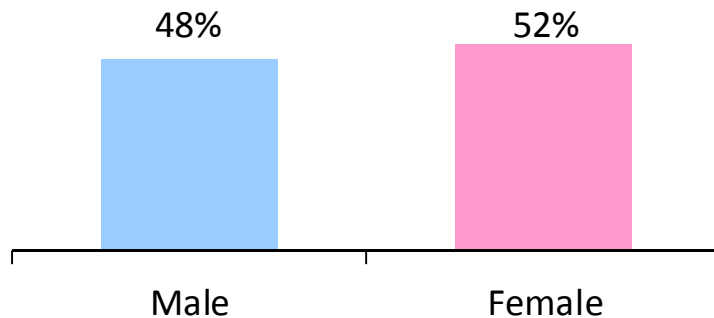
Age



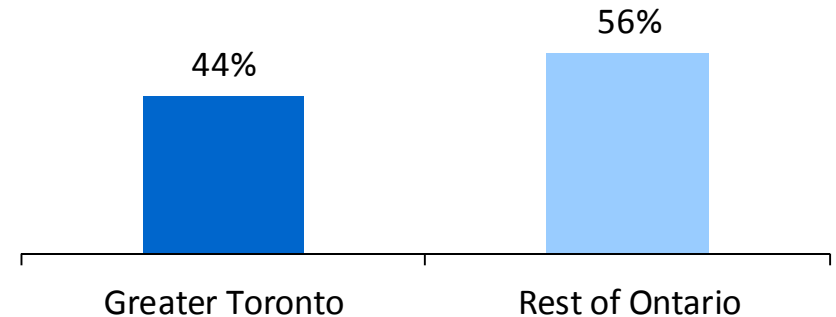
Household Income



Gender



Region



Segmentation: Weighted Ontario Regions

Weighted Ontario Sample Size

GTA: n=264

Toronto: n=138

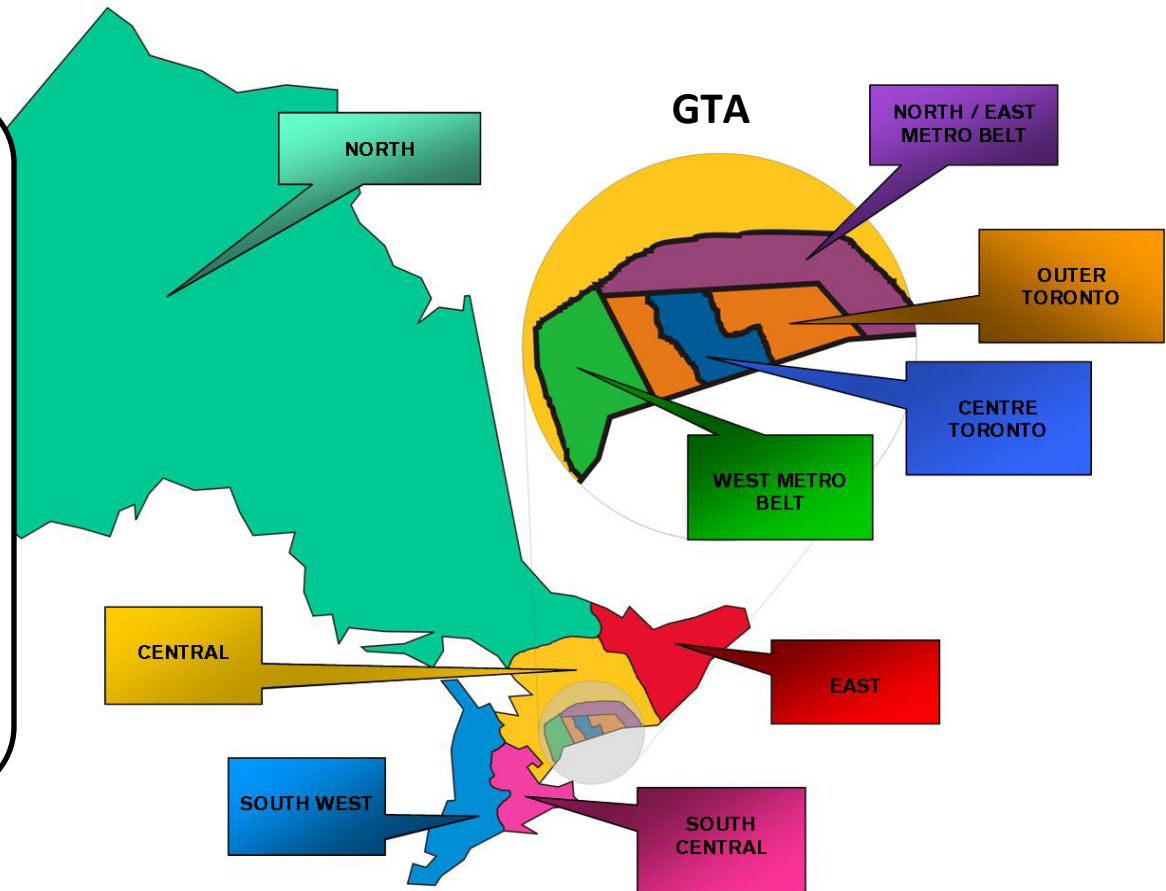
Metro Belt: n=126

Rest of Ontario: n=336

South West: n=73

Central/South Central: n=139

East/North: n=124



Detailed Findings



Just over 4-in-10 (43%) Ontarians say they're at least somewhat familiar with naturopathic medicine



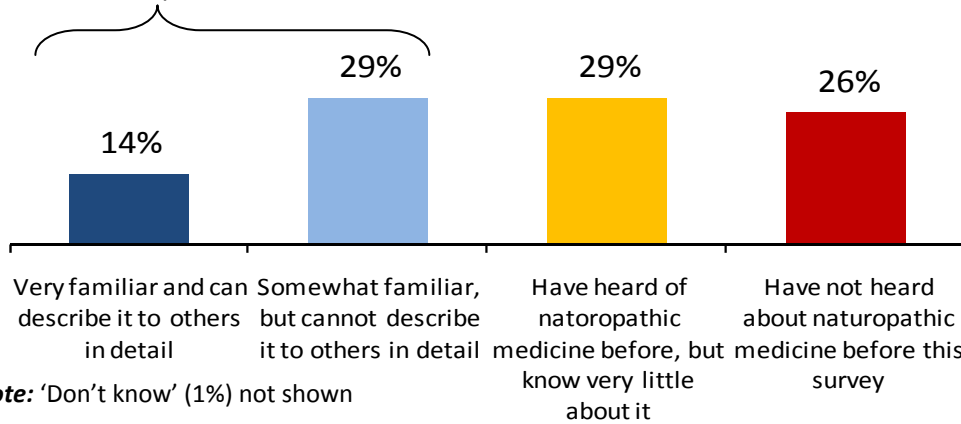
How familiar are you with the practice of naturopathic medicine? Would you say ...
(asked of all 600 respondents)

Sample Breakdown ►►

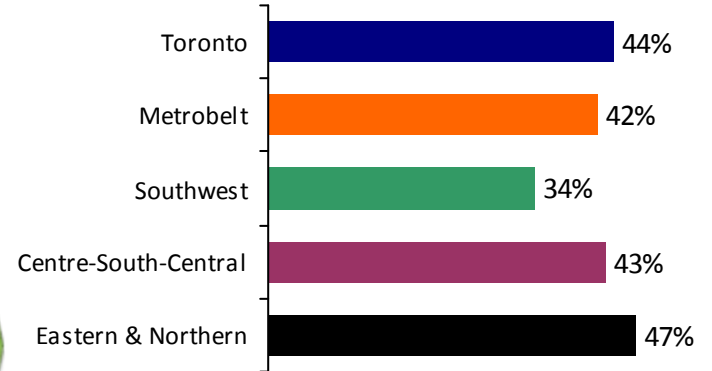
2011 Respondents who say they are *very* or *somewhat* familiar:

August 2011

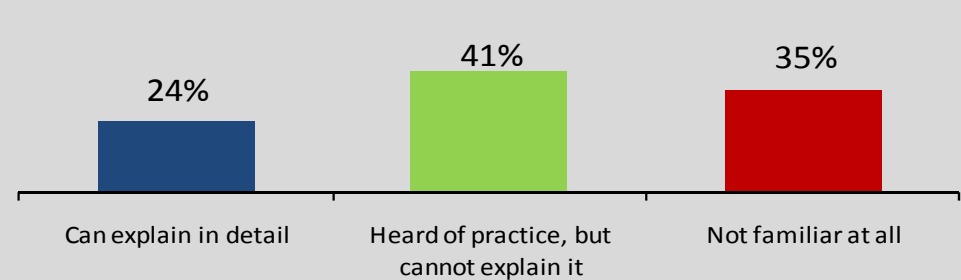
43% *very* or *somewhat* familiar with naturopathic medicine



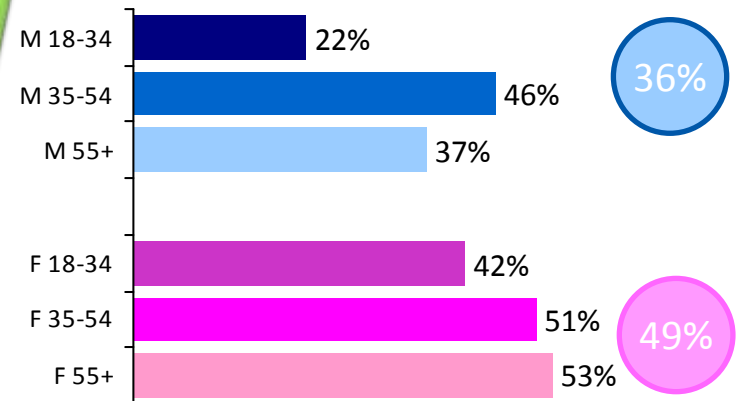
Regional Segmentation



March 2006



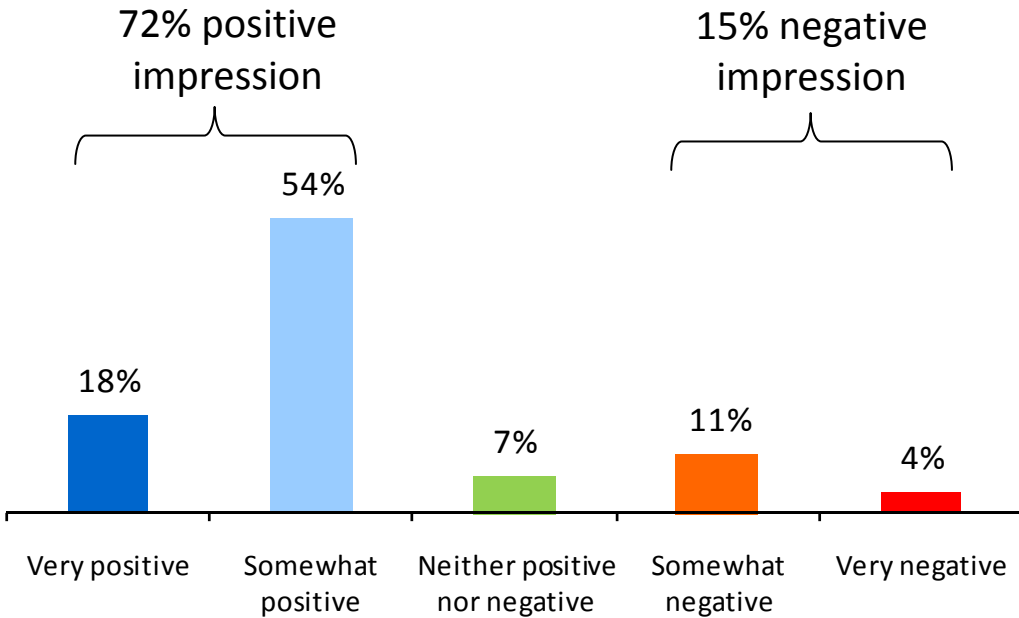
Age & Gender Segmentation



Among those familiar, 7-in-10 (72%) have a positive impression of naturopathic medicine



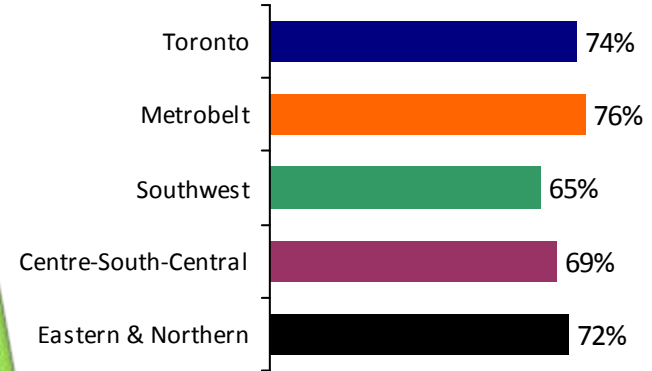
How would you describe your overall impression of naturopathic medicine? Would you say you had a [read scale] impression?
 (asked only of those who have at least heard of naturopathic medicine; n = 433)



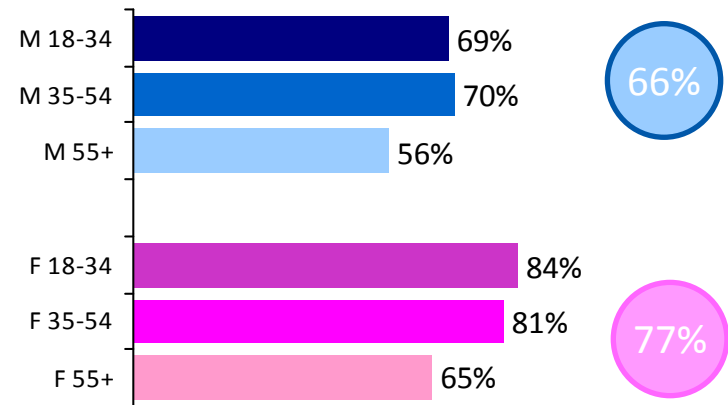
Sample Breakdown ▶▶

Respondents who say they are **very and somewhat positive**:

Regional Segmentation



Age & Gender Segmentation



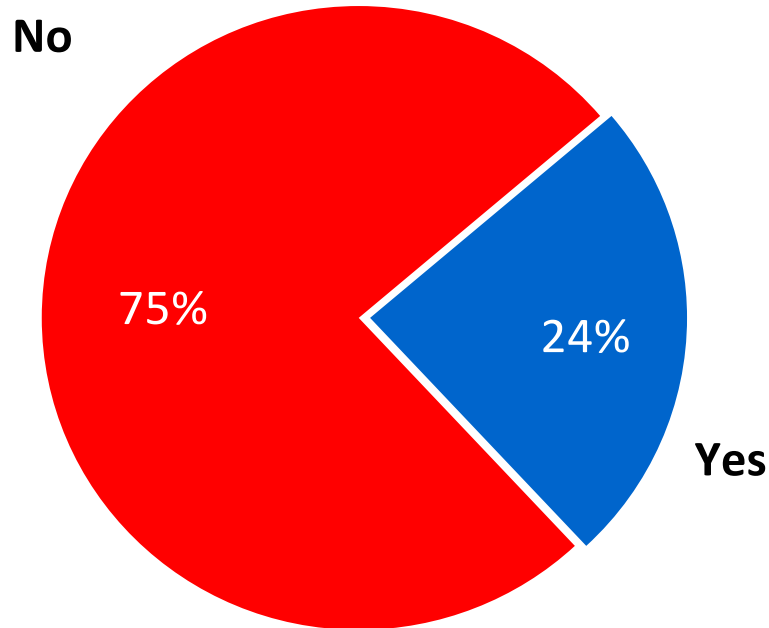
Note: 'Don't know' (6%) not shown

One quarter (24%) of those familiar have been to a naturopathic doctor; GTA residents most likely users

Q

Have you ever seen a naturopathic doctor for health care treatment?

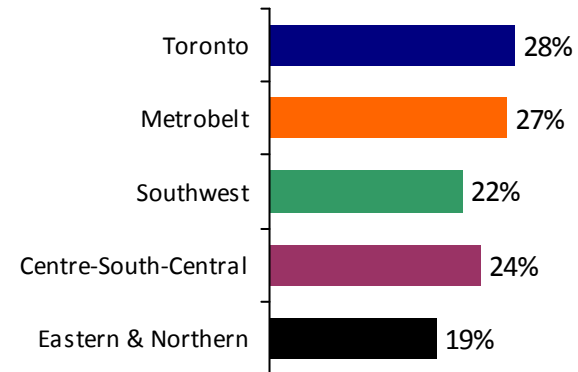
(asked only of those who have at least heard of naturopathic medicine; n = 433)



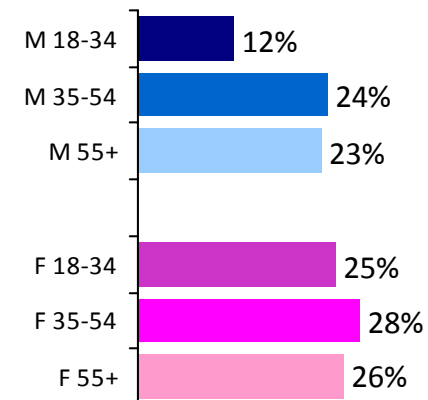
Sample Breakdown ▶▶

Respondents who have seen an ND for healthcare treatment

Regional Segmentation



Age & Gender Segmentation



21%

27%

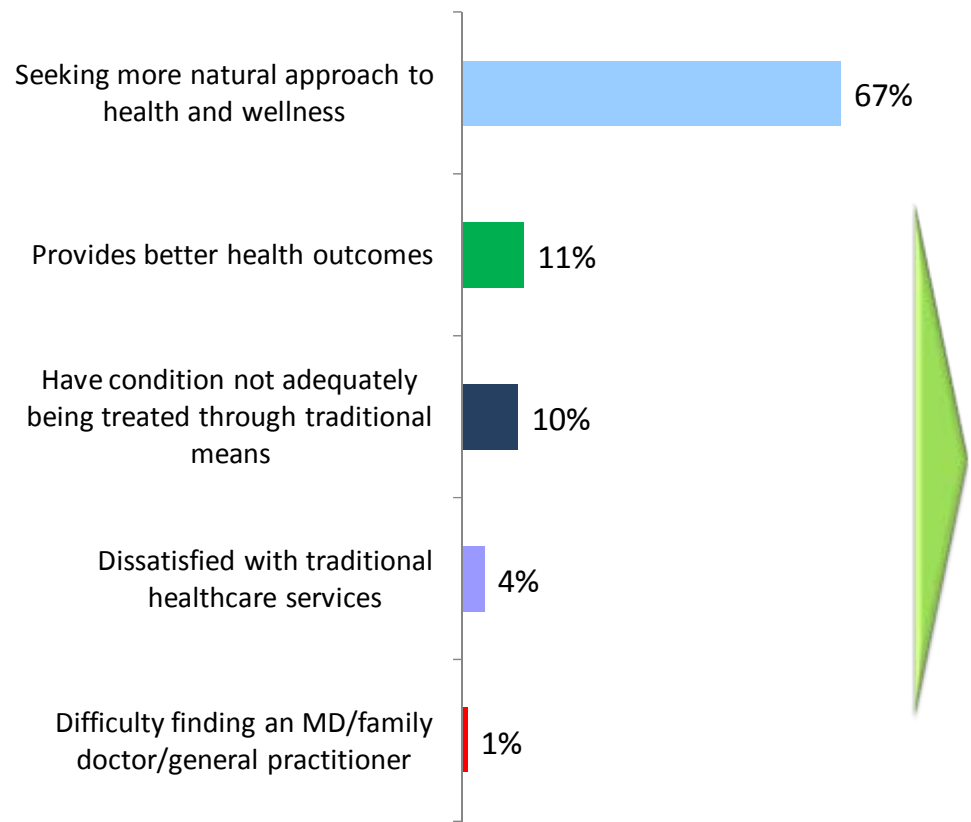
Note: 'Don't know' (<1%) not shown

“Seeking a more natural approach to health, wellness by far the primary reason to visit naturopathic doctor



What was the primary reason for your last visit to a naturopathic doctor?

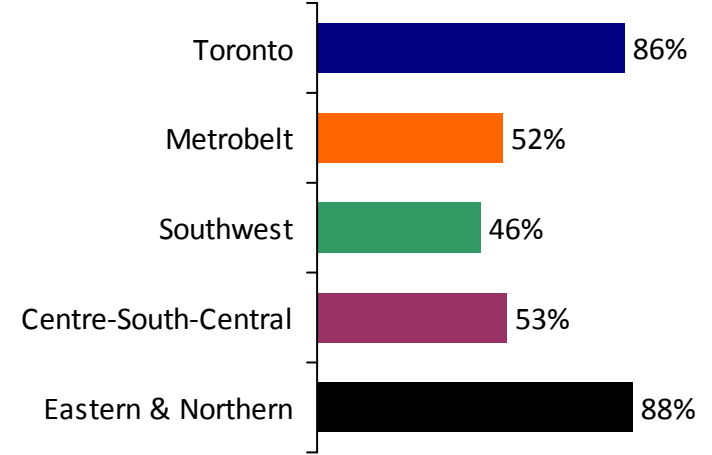
(asked only of those who have seen a naturopathic doctor; n = 102)



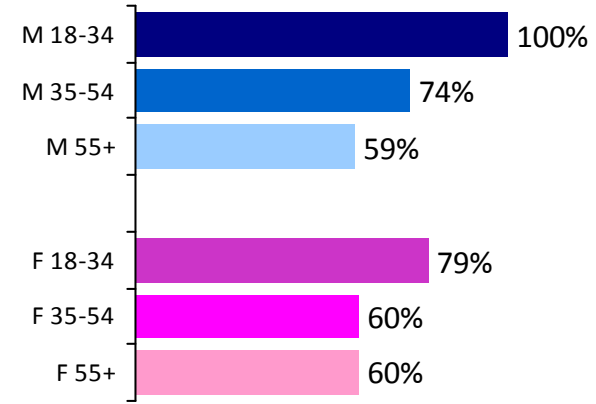
Sample Breakdown ▶▶

Respondents who say seeking more natural approach to health and wellness

Regional Segmentation



Age & Gender Segmentation



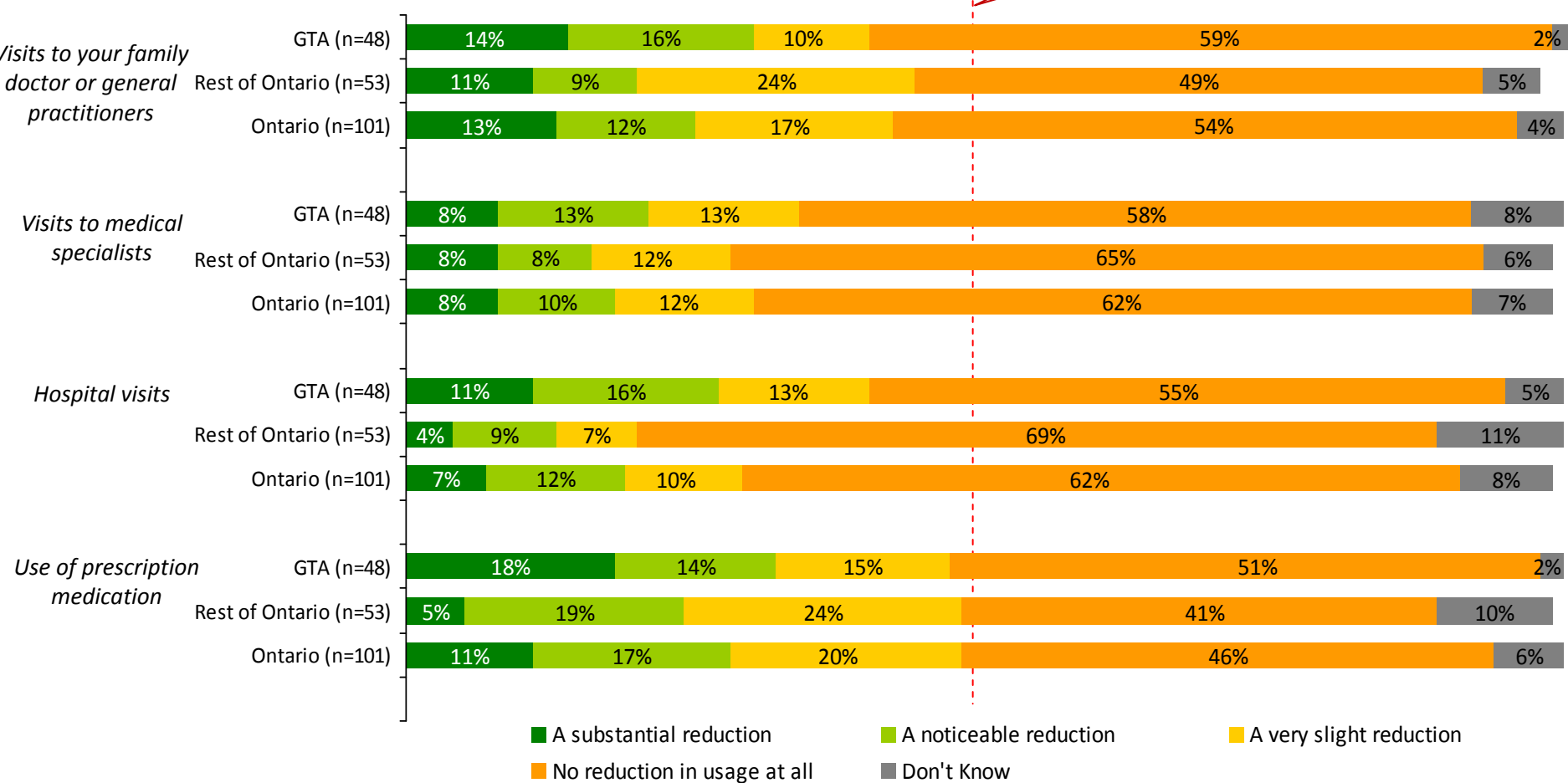
Note: 'Don't know' (8%) not shown

Most substantial impact of visiting naturopathic doctors is a reduced use of prescription medication



How has having a naturopathic doctor reduced your use of the following medical services?
(asked only of those who have seen a naturopathic doctor; n = 101)

50% mark



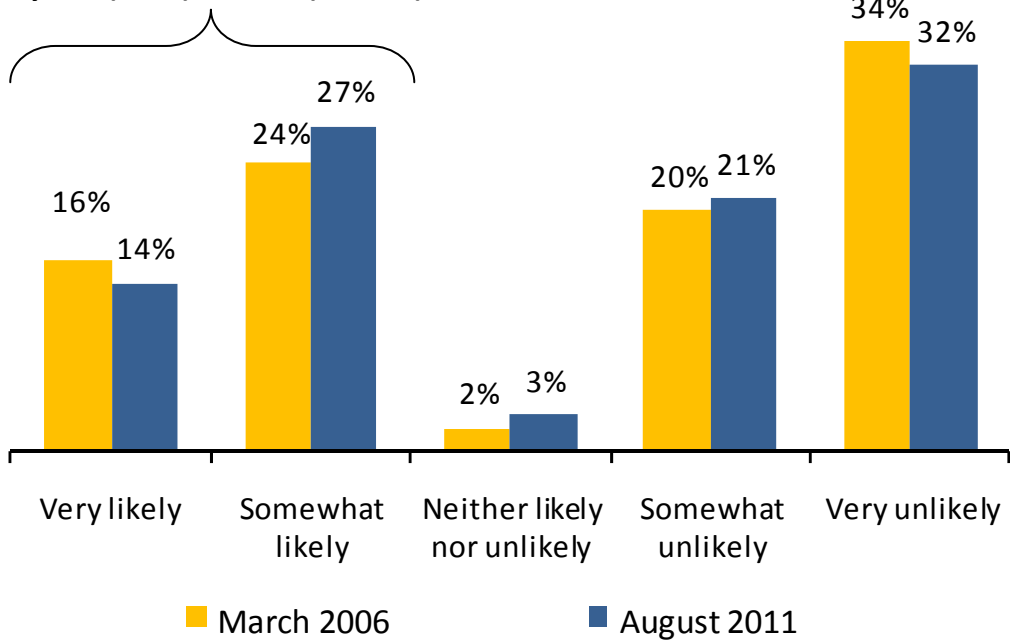
4-in-10 (41%) likely to see a naturopathic doctor in the next few years; unchanged since 2006

Q As you may know, naturopathic medicine is a health care profession that focuses on disease prevention, patient education, and health maintenance and uses natural methods to promote healing, often eliminating the need for long term medical care or prescription drugs.

How likely are you to see a naturopathic doctor in the next few years?

(asked of all 600 respondents)

41% likely to see an ND in next few years (2011) vs. 40% (in 2006)

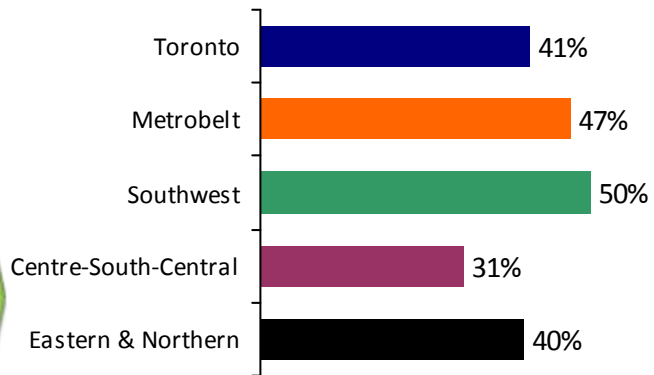


Note: 'Don't know' not shown

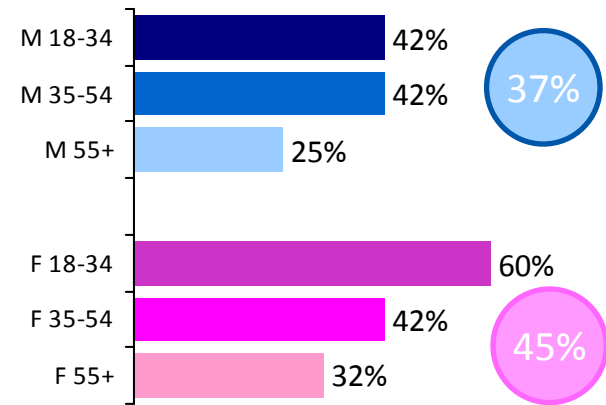
Sample Breakdown ▶▶

2011 Respondents who say *very or somewhat likely*:

Regional Segmentation



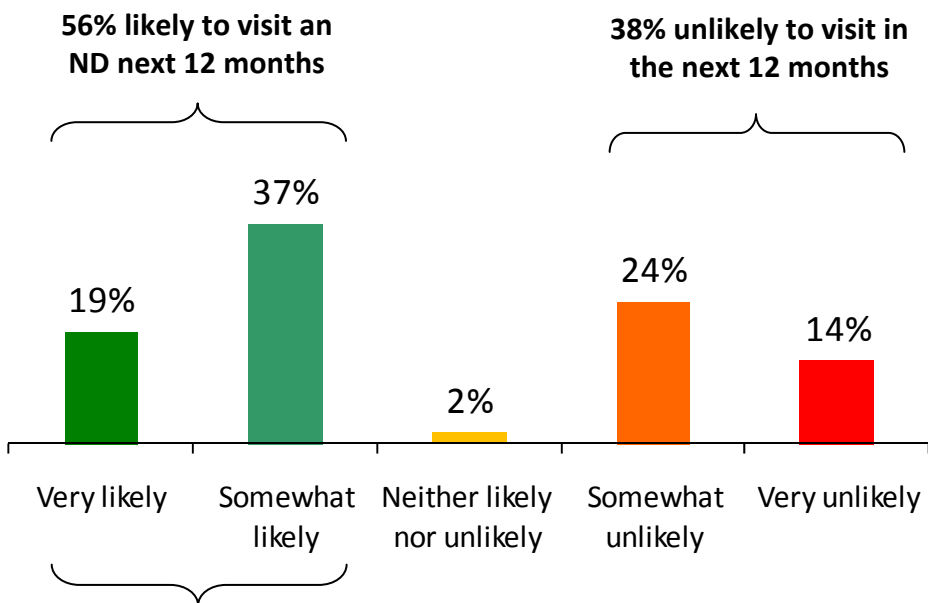
Age & Gender Segmentation



Over half who plan to see a naturopathic doctor in the next few years, plan to do so in the next 12 months



And how likely are you to see a naturopathic doctor in the next 12 months?
 (asked of respondents who are very or somewhat likely to see a ND in the next few years; n=247)

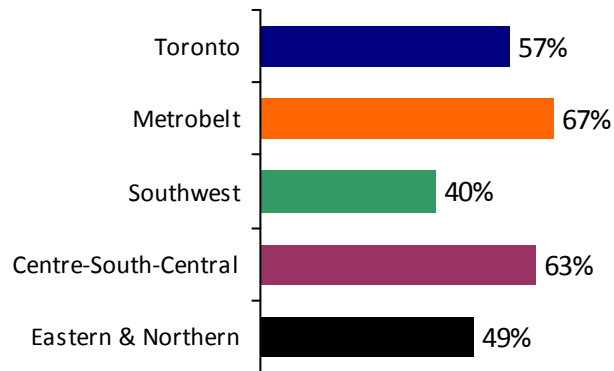


An estimated 23% of all Ontarians say they are likely to visit an ND in the next 12 months

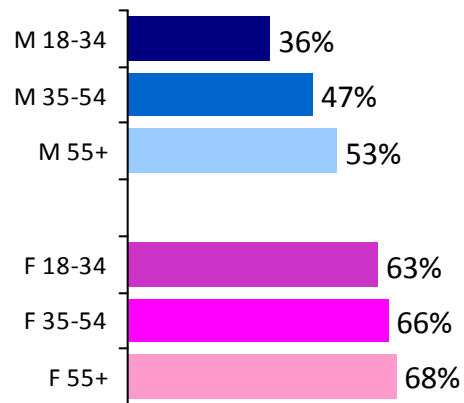
Sample Breakdown ▶▶

Respondents who say they are very or somewhat likely:

Regional Segmentation



Age & Gender Segmentation



44%

65%

Note: 'Don't know' (3%) not shown

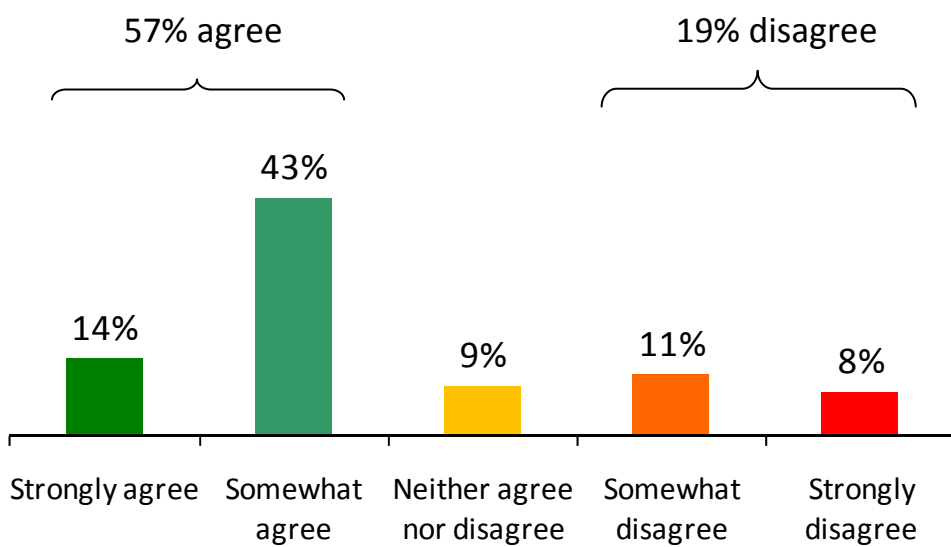
Nearly 6-in-10 (57%) of Ontarians agree that naturopathic medicine is leading to better outcomes for those who use



I'd like you to tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement:

Naturopathic medicine is leading to better healthcare outcomes for those in Ontario who use it?

(asked of all 600 respondents)



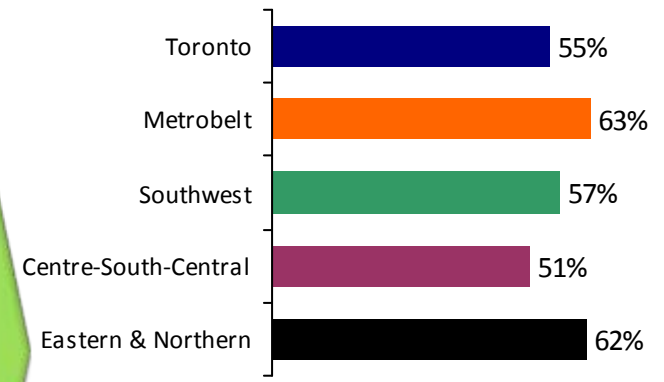
Note: 'Don't know' (15%) not shown



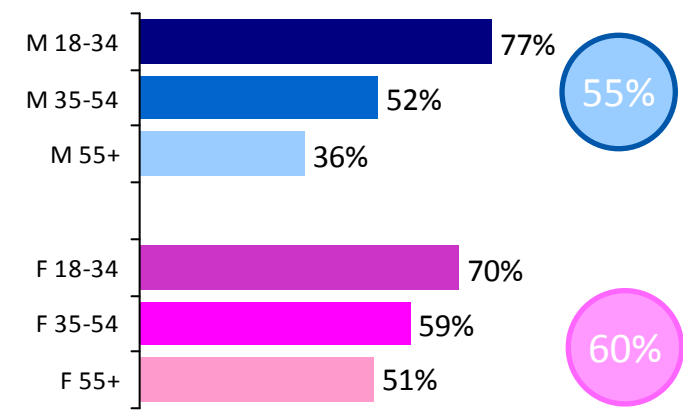
Sample Breakdown ▶▶

Respondents who say they strongly or somewhat agree:

Regional Segmentation



Age & Gender Segmentation





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