

CANADA'S TOP 40 Research Hospitals

HOSPITAL RESEARCH SPENDING FLAT

Research spending at Canada's Top 40 Research Hospitals was flat in Fiscal 2015 (-0.3%) following the growth of 5.0% in Fiscal 2014. Combined research spending for Hospitals, Hospital Networks and Health Authorities totaled \$2.39 billion in Fiscal 2015, from \$2.40 billion in Fiscal 2014. Research spending rose at 26 organizations and declined at 13 others (comparable data were not available for 1 organization). The number of health researchers expanded by 3.5% to 8,280 nation-wide.

Toronto's University Health Network remained the largest research performer with \$316.3 million of spending, up by 4.4% in Fiscal 2015, followed by Hospital for Sick Children (\$182.0 million, down -9.0%) and McGill University Health Centre (\$172.2 million, down -9.5%). Hamilton Health Sciences occupied 4th place nationally with \$167.4 million of research spending (down -21.1%). Provincial Health Services in British Columbia rounded out the top 5 performers with \$133.9 million of research spending (down -6.0%).

THE \$100 MILLION CLUB

With research spending topping \$100 million each, 8 organizations gained membership in RESEARCH Infosource's \$100 Million Club in Fiscal 2015, the same number as in 2014. In total, \$100 Million Club members spent \$1.35 billion last year, compared with \$1.41 billion in Fiscal 2014 – a decline of 4.1%.

PROVINCIAL PERFORMANCE

Health research organizations in Ontario accounted for the bulk of the national total. Twenty Ontario research performers accounted for 57.4% of Top 40 spending, down from 59.0% the year before (this largely due to the inclusion this year of Alberta performers). Quebec's 12 performers were responsible for 24.4% of the national total, down from 26.4%. Two performers in British Columbia contributed 11.0% of the national total.

Top 40 – Leading Provinces

Province	% of Total
Ontario (20)	57.4
Quebec (12)	24.4
British Columbia (2)	11.0

RESEARCH SPENDING GROWTH

In spite of the flat national result, nine of the Top 40 Research Hospitals expanded their research spending by 10% or more. Activity expanded at The Royal (35.7%), Alberta Health Services – Calgary Zone (25.6%), Children's Hospital of Eastern Ontario (25.5%), Capital District Health Authority (24.2%) and Holland Bloorview Kids Rehabilitation Hospital (16.2%).

RESEARCH INTENSITY

RESEARCH Infosource measures research intensity in two ways: by researcher (research spending per researcher), and by hospital (hospital research spending as a percent of total hospital spending). Alberta Health Services (Calgary Zone) was tops in researcher-intensity among large performers, spending \$744,200 per researcher. In the medium category, Sinai Health System led with \$750,300 per researcher – also tops in the country. Among small hospitals Institut de Cardiologie de Montréal stood out with \$624,400 per researcher.

Measured by hospital intensity (research spending as a % of total hospital spending), the leading large size institution was University Health Network (16.9%), Hospital for Sick Children (24.8%) was the leader in the medium size category, and Institut de Cardiologie de Montréal (23.9%) led the small size performers.

THIS YEAR AND NEXT

Fiscal 2015 was a disappointing year for the hospital research sector, with combined activity falling by -0.3% and many of the top performers losing ground. The bulk of health research funds come from federal and provincial government sources, and those sources are under fiscal pressure. Thus, it would be unrealistic for health research spending to continue to grow at a faster rate than available resources. Last year we said that "... given the current challenge to government budgets at all levels, it is hard to envisage any large expansion of resources next year. From that standpoint, steady-as-she-goes would be a positive outcome". Our forecast was borne out. But with health research costs rising faster than funding, even a steady-state represents a fall in real resources. Regrettably, based on current economic and fiscal trends, next year will most likely see a repeat of this year's tepid result. If the trend continues it will call for funders and performers to further prioritize their efforts so as not to hinder the most productive activities.

Top 10 Research Hospitals by Growth

2015 Rank	Spending Growth		Research Hospital	% Change 2014-2015
	Overall	Research Hospital		
1	36		The Royal	35.7
2	18		Alberta Health Services - Calgary Zone	25.6
3	20		Children's Hospital of Eastern Ontario	25.5
4	24		Capital District Health Authority	24.2
5	34		Holland Bloorview Kids Rehabilitation Hospital	16.2
6	35		Institut universitaire de gériatrie de Montréal	15.3
7	23		Douglas Mental Health University Institute	14.1
8	27		Kingston General Hospital	11.3
9	37		Thunder Bay Regional Health Sciences Centre	10.9
10	25		Institut universitaire en santé mentale de Québec	8.8

Spotlight on Hospital Research Activity

TOP RESEARCHER-INTENSIVE ORGANIZATIONS (Research Spending per Researcher)

Rank	Large	\$000	Rank	Medium	\$000	Rank	Small	\$000
1	Alberta Health Services - Calgary Zone	\$744.2	1	Sinai Health System	\$750.3	1	Institut de Cardiologie de Montréal	\$624.4
2	University Health Network	\$558.8	2	Hospital for Sick Children	\$742.9	2	Baycrest	\$493.6
3	McGill University Health Centre (MUHC)	\$479.6	3	St. Michael's Hospital	\$372.9	3	Centre for Addiction and Mental Health	\$487.9

TOP HOSPITAL-INTENSIVE ORGANIZATIONS (Research Spending as a % of Total Hospital Spending)

Rank	Large	%	Rank	Medium	%	Rank	Small	%
1	University Health Network	16.9	1	Hospital for Sick Children	24.8	1	Institut de Cardiologie de Montréal	23.9
2	McGill University Health Centre (MUHC)	16.1	2	Sinai Health System	14.8	2	Douglas Mental Health University Institute	18.0
3	Hamilton Health Sciences	13.2	3	Sir Mortimer B. Davis Jewish General Hospital	14.6	3	Institut universitaire en santé mentale de Québec	15.7

Note: Size is based on total hospital spending: Large = more than \$1 billion; Medium = \$400 million to \$1 billion; Small = less than \$400 million

The \$100 Million Club

2015 Rank	Research Hospital	Research Spending \$000
1	University Health Network	\$316,300
2	Hospital for Sick Children	\$182,020
3	McGill University Health Centre (MUHC)	\$172,193
4	Hamilton Health Sciences	\$167,386
5	Provincial Health Services Authority	\$133,905
6	Ottawa Hospital	\$133,688
7	Vancouver Coastal Health Authority	\$129,559
8	London Health Sciences Centre/ St. Joseph's Health Care London	\$115,852