

Canada's Top 40 Research Hospitals List 2014 Analysis

Hospital Research Resource Growth Stalls

Canada's Top 40 Research Hospitals reported an increase of only 1.1% in their combined research resources¹ in Fiscal 2013, compared with a gain of 4.8% in Fiscal 2012. The hospitals' total research resources grew to \$2.3 billion compared with \$2.28 billion the previous year. The number of hospital researchers fell by -1.0% to 8,240 from 8,323.

Toronto's University Health Network topped the national ranking reporting \$312.3 million of research resources. Hamilton Health Sciences jumped 5 places to 2nd overall on the strength of \$182.1 million of research funding, up from \$123.8 million in Fiscal 2012. The Hospital for Sick Children was in 3rd place with \$179.4 million of funding. In 4th position was the McGill University Health Centre at \$170.5 million, followed by the Ottawa Hospital at \$136.8 million. In total 25 hospitals reported gains in research resources, while numbers fell at 15 other institutions.

The \$100 Million Club

With research resources in excess of \$100 million in Fiscal 2013, 9 hospitals gained membership in Research Infosource's \$100 Million Club. Furthermore, their resource growth was far stronger than the average; combined research resources expanded by 4.7% compared with a -4.4% decline among the 31 non-Club members. As a result, Club members accounted for 62.9% of all Top 40 hospital research activity, up from 61.7% of the total last year.

| The \$100 Million Club | | |
|------------------------|--|-----------------------|
| 2013 Rank | Research Hospital | Research Income \$000 |
| 1 | University Health Network* | \$312,300 |
| 2 | Hamilton Health Sciences | \$182,101 |
| 3 | Hospital for Sick Children | \$179,373 |
| 4 | McGill University Health Centre (MUHC) | \$170,498 |
| 5 | Ottawa Hospital* | \$136,831 |
| 6 | Provincial Health Services Authority | \$128,101 |
| 7 | Vancouver Coastal Health Authority | \$117,971 |
| 8 | London Health Sciences Centre/St. Joseph's Health Care London* | \$114,595 |
| 9 | Mount Sinai Hospital, Joseph and Wolf Lebovic Health Complex* | \$109,057 |

*Member of CAHO; provided research expenditure data for FY2013.

¹ Some members of CAHO (indicated with an asterisk *) provided research expenditure data. Other institutions provided research income data.

Provincial Performance

Nearly half of the Top 40 Research Hospitals (19 in total) are located in Ontario. (Alberta hospital figures are not available.) Ontario institutions accounted for 59.2% of total Top 40 resources in Fiscal 2013. Ontario hospitals' research resources grew by 3.1% over Fiscal 2012, which surpassed the 1.1% national total. Quebec was home to 14 leading research hospitals, which accounted for 26.8% of total research funding. However, growth was flat in Quebec, expanding by only 0.1%. Two health authorities in British Columbia were responsible for 10.7% of the Top 40 research resources total, yet funding fell by -6.0% year over year in BC. In Manitoba, 2 hospitals/authorities accounted for 1.7% of total Top 40 resources. Manitoba institutions enjoyed resource growth of 4.2%, which put Manitoba in the lead nationally. Two hospitals/health authorities in Nova Scotia accounted for 1.4% of the total, but their research resources fell by -5.2% in Fiscal 2013. Finally, one institution in Saskatchewan represented 0.3% of national research funding, but suffered a -7.1% year over year drop.

| Top 40 – Leading Provinces | |
|----------------------------|------------|
| Province | % of Total |
| Ontario (19) | 59.2 |
| Quebec (14) | 26.8 |
| British Columbia (2) | 10.7 |

Research Resource Growth

Health Sciences North is new to the Top 40 list this year, and also reported the strongest gain in Fiscal 2013, posting a 75.0% increase in research resources. Hamilton Health Sciences had an impressive 47.1% increase in research resources, followed by the Children's Hospital of Eastern Ontario (30.7%), Institut universitaire de gériatrie de Montréal (26.0%) and The Royal (17.7%).

| Top 10 Research Hospitals by Growth | | | |
|-------------------------------------|---------|--|--------------------|
| 2013 Rank | | Research Hospital | % Change 2012-2013 |
| Income Growth | Overall | | |
| 1 | 40 | Health Sciences North (HSN) | 75.0 |
| 2 | 2 | Hamilton Health Sciences | 47.1 |
| 3 | 20 | Children's Hospital of Eastern Ontario* | 30.7 |
| 4 | 34 | Institut universitaire de gériatrie de Montréal | 26.0 |
| 5 | 33 | The Royal | 17.7 |
| 6 | 25 | Hôpital Maisonneuve-Rosemont | 16.1 |
| 7 | 9 | Mount Sinai Hospital, Joseph and Wolf Lebovic Health Complex* | 14.6 |
| 8 | 32 | Hôpital du Sacré-Coeur de Montréal | 11.2 |
| 9 | 8 | London Health Sciences Centre/St. Joseph's Health Care London* | 11.1 |
| 10 | 24 | Institut universitaire en santé mentale de Québec | 8.4 |

*Member of CAHO; provided research expenditure data for FY2013.

This Year and Next

Fiscal 2013 was somewhat disappointing from the perspective of national hospital research funding growth. The total resources of the Top 40 Research Hospitals expanded by only 1.1%, which lagged the effective rate of inflation. The 2013 result came on the heels of a robust 4.8% gain in research funding in Fiscal 2012. Digging deeper into the data a more complex picture emerges. Larger research hospitals – the 9 members of Research Infosource's \$100 Million Club – fared well, gaining 4.7% in total. Thus, much of the pain was felt among the 31 smaller institutions, where combined research resources fell by -4.4%.

Hospitals in Saskatchewan (-7.1%), British Columbia (-6.0%) and Nova Scotia (-5.2%) felt the brunt of the declines. Quebec hospitals barely avoided a drop in their research funding (0.1% gain). Resource gains of 3.1% at Ontario's 19 research hospitals kept the national increase in positive territory at 1.1% growth.

Research hospitals derive most of their research funding from public sources – federal and provincial governments. Other income sources include companies, charities, endowments and bequests, foreign foundations and governments. Corporate and foreign funding has been weak in recent years. Charitable funding has held up, but is too small to affect trends. At the present time government funding will determine the overall health of hospital research funding.