

Canada's Top 40 Research Hospitals

Hospital Research Resources Gain

Research activity at Canada's Top 40 Research Hospitals rose by a combined 5.0% in Fiscal 2014. Hospitals, Hospital Networks and Health Authorities reported that their research expenditures (or in 4 instances, research income) increased to \$2.38 billion from \$2.27 billion in Fiscal 2013. (Detailed data for Alberta hospitals, which were not available in time for publication, would have added \$165 million to the total.) The number of hospital researchers increased by 4.5% to 8,572 from 8,205 the prior year. New to the Top 40 list this year is Ottawa's Hôpital Montfort.

The country's largest hospital research performer was Toronto's University Health Network, which reported \$303.1 million of spending on research, up 1.6% from Fiscal 2013. Hamilton Health Sciences occupies 2nd place with \$212.0 million of spending, an increase of 16.4%. The Hospital for Sick Children took third place with spending of \$199.9 million, up 14.3% on the year prior. With \$190.3 million of spending (up 8.4%) McGill University Health Centre captured 4th place on the Top 40 list, followed by B.C.'s Provincial Health Services Authority at \$142.4 million, up 11.1%. In total, 27 institutions reported activity gains against 13 where activity declined.

Research Intensity

Research Infosource measures research intensity in two ways: by researcher (research income/expenditure per researcher), and by institution (institution research activity as a percent of total institution income/expenditure). Institute de Cardiologie de Montréal (ICM) posted the highest level of researcher-intensity with \$705,500 of expenditure per researcher. Next was Mount Sinai Hospital, Joseph and Wolf Lebovic Health Complex (\$663,900), Baycrest (\$581,200), University Health Network (\$550,100), and Centre for Addiction and Mental Health (\$540,300).

Measured by institutional intensity (proportion of total activity that research comprises - i.e. institution budget), Institut de Cardiologie de Montréal ranked highest among the Top 40, with research activity at 26.0% of total hospital expenditure. ICM narrowly displaced last year's leader, The Hospital for Sick Children (25.6% intensity). McGill University Health Centre and Mount Sinai Hospital, Joseph and Wolf Lebovic Health Complex were tied at 17.8% intensity.

The \$100 Million Club

With activity topping \$100 million each, 8 hospitals gained membership in Research Infosource's \$100 Million Club, compared with 9 hospitals the year before. Combined activity among the 8 Club members expanded by 6.7%, to \$1.41 billion, slightly above the 5.0% all-institution increase. Club members accounted for 59.3% of the Top 40 total research activity.

| The \$100 Million Club | | |
|------------------------|--|-------------------------|
| 2014 Rank | Research Hospital | Research Activity \$000 |
| 1 | University Health Network | \$303,100 |
| 2 | Hamilton Health Sciences | \$212,017 |
| 3 | The Hospital for Sick Children | \$199,927 |
| 4 | McGill University Health Centre (MUHC) | \$190,309 |
| 5 | Provincial Health Services Authority* | \$142,381 |
| 6 | Vancouver Coastal Health Authority* | \$124,057 |
| 7 | The Ottawa Hospital | \$123,691 |
| 8 | London Health Sciences Centre/St. Joseph's Health Care London ^(a) | \$113,381 |

*Reported research income data.

(a)Research expenditure amounts were combined as these hospitals have one research institute.

Provincial Performance

The province of Ontario had half the nation's total - 20 of the Top 40 Research Hospitals - and accounted for 59.0% of total national research activity, about the same as last year. Quebec's 13 institutions comprised 26.4% of the total, followed by 2 British Columbia members of the Top 40, which accounted for 11.2% of total activity. From a provincial standpoint, growth was strongest in Manitoba, where activity at 2 reporting institutions increased by 13.4%. Gains were also stronger than the national trend in British Columbia (up 8.3%) and Ontario (up 4.9%).

| Top 40 - Leading Provinces | |
|----------------------------|------------|
| Province | % of Total |
| Ontario (20) | 59.0 |
| Quebec (13) | 26.4 |
| British Columbia (2) | 11.2 |

Performance by Type

Research Infosource's Top 40 Research Hospitals list is in fact an amalgam of 3 types of institutions: stand-alone Hospitals, Hospital Networks and Health Authorities. There are 22 Hospitals on the Top 40 list, accounting for a combined \$759.9 million of research activity and a total 6.9% year-on-year increase. Hospital Networks include 13 organizations with \$1.3 billion of research, up 3.1% on Fiscal 2013. The Top 40 also includes 5 Health Authorities, which reported \$319.7 million of research, an increase of 8.2%.

Resource Growth

Eleven of the Top 40 hospitals recorded research growth in double-digits. Research activity at Toronto's Women's College Hospital increased by 28.2%, followed by Holland Bloorview Kids Rehabilitation Hospital (up 27.7%), St. Boniface Hospital (up 20.9%), Hôpital Maisonneuve-Rosemont (up 19.6%), and Hamilton Health Sciences (up 16.4%).

| Top 10 Research Hospitals by Growth | | | |
|--|----------------|--|---------------------------|
| 2014 Rank | | Research Hospital | % Change 2013-2014 |
| Activity Growth | Overall | | |
| 1 | 31 | Women's College Hospital | 28.2 |
| 2 | 33 | Holland Bloorview Kids Rehabilitation Hospital | 27.7 |
| 3 | 29 | St. Boniface Hospital | 20.9 |
| 4 | 26 | Hôpital Maisonneuve-Rosemont+ | 19.6 |
| 5 | 2 | Hamilton Health Sciences | 16.4 |
| 6 | 9 | Sunnybrook Health Sciences Centre | 16.0 |
| 7 | 15 | Centre for Addiction and Mental Health | 15.3 |
| 8 | 3 | The Hospital for Sick Children | 14.3 |
| 9 | 38 | Hôpital Montfort | 12.3 |
| 10 | 5 | Provincial Health Services Authority* | 11.1 |

*Reported research income data.

+Not current name

This Year and Next

Research activity among the Top 40 (expenditure or income) rose by 5.0% from last year, a substantial improvement over the 1.1% gain in Fiscal 2013.

As with universities and colleges, a high portion of hospital research funding comes from public sector sources – primarily federal and provincial governments. However, hospitals typically receive more of their research resources from private sources - non-profit organizations and individual donors.

One is ever hopeful, but 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.