The Beryl Institute - Ipsos PX Pulse
Consumer Perspectives on Patient Experience in the U.S.

MAY 2021

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INTRODUCTION

Tracking the Perspectives of Consumers and Following Trends Reveals both Key Items of Importance and Shifting Sentiments

This report presents our fifth release of The Beryl Institute – Ipsos PX Pulse. PX Pulse was intended to serve as a tracking and trending report of U.S. consumer sentiment as it pertains to their healthcare experience. This report provides us our first look across three distinct years and also provides insights from moments both before and after the height of the COVID-19 pandemic as well. From data first collected pre-pandemic in December 2019 to data collected during a period of emerging hope with increasing vaccination rates and diminishing cases in the U.S. in March 2021, we find some interesting shifts in perspective and reinforcing of core views.

As we publish this release of PX Pulse, we note we did not collect data in December 2020 to release a report for Q1 2021, and this year we start with this release for Q2 with data collected in March. As we entered this year at another height in the pandemic, one climbing higher than our initial wave in April of 2020, we paused collection to look at the shifts across the period since our last report released in September (Q3 2020). As we traversed this most recent surge and look now at a Spring in the U.S. which is reflecting greater hope and attempts to return to some sense of normalcy in life, we do see some interesting trends.

As vaccination rates increase, we still see some hesitancy to seek the vaccine due to a number of reasons, including lack of trust in healthcare or the

government, lack of information or understanding and even misinformation on the vaccines themselves and more. This data is revealed later in the report. We too are experiencing a clear shift in public presence, in general, as states are working to open up businesses including restaurants and stores, sporting events and more while asking people to be cognizant of the recommendations from the Centers for Disease Control and Prevention (CDC) and local health departments to still wear masks and socially distance to continue to impede any further spread of the virus.

Through this release, we see that the foundational belief in the importance of experience was not shattered by this pandemic. We find the same significant number of consumers see experience as important to them today as they did prior to the pandemic. In fact, the past year even reflected a slight increase in people's perspectives on experience and quality. A trend of note is that both the quality of care and the experience people report having are on a slight decline. As reported in earlier releases, the potential for the "halo effect," as healthcare organizations were seen as heroes earlier in the pandemic, may be wearing off as both consumers and those in healthcare themselves are fatigued by the pandemic in general. Specifically of note is consumers report overall quality of healthcare in America at its lowest rating since we started PX Pulse.

At the same time, we have seen an interesting trend aligned with the growing hope experienced in communities around the U.S., as the perspectives on the federal response to COVID-19 has improved. Yet people are still cautious about their comfort in returning to seek care. The dynamic nature of this moment is palpable as people acknowledge the realities of fighting a global pandemic while searching for hope and expressing optimism in both their words and actions. This PX Pulse reflects a cautious optimism in consumers on which the future will be built. As we continue to track these trends, it will be imperative not just to understand but act on what this pandemic itself revealed.

Key to that is the effort just launched by The Beryl Institute to address the realities of the year we have been through and the continued moment through which we live. In a call to action from the Institute community, a Declaration for Human Experience has been introduced and tackles much of what the data revealed over the last year in PX Pulse itself. It calls on us to address healthcare disparities and systemic racism we reported in PX Pulse just last year, to support the needs, vulnerabilities and healing of the healthcare workforce, to ensure real partnership with patients, families and care partners and calls on us all to work better together for a brighter, more collaborative future. (You can find more on this effort at transformHX.org).

This is what PX Pulse was set out to do as well: to uncover trends, to open conversation, to reveal data that will not only allow for reflection but call us to act. As you review this release, we hope you hear your voice but more so see your path forward in ensuring the best in healthcare for all. Listening to the voices of consumers is essential to building and sustaining a better healthcare system and we dare say a stronger society overall.

METHODOLOGY

This research was conducted using online surveys fielded through the Ipsos KnowledgePanel,® one of the only probability-based online panels that is representative of the U.S. population. The KnowledgePanel was chosen to provide one of the highest levels of accuracy and representativeness available on the web, allowing for the accurate measurement of consumer experiences, opinions and behaviors in the United States.

In total, 1020 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from March 12 – 15, 2021 to a sample group of people that were randomly selected to be representative of the U.S. population in terms of Census estimates of gender, age, race, ethnicity, education, income and region. The survey was fielded in English-only. Findings presented in this report were weighted to correct for any over- or under-representation in the distribution of completed surveys across these demographic categories, as well as to account for the aforementioned over-sampling.

In the 2021 releases of PX Pulse, we will present findings in a pattern of shorter core inquiries and deeper-dive sets of questions in alternating quarters. Noting we did not release a Q1 2021 report, we start this year with Q2 and a focus on the core questions noted below. We also continue to explore the impact of COVID-19 on consumer perspective as well. Future releases will include explorations of healthcare setting-specific and domain-specific questions.

The core question set we ask each quarter are:

1 Thinking about the healthcare system in America as a whole, overall, how would you rate the quality of healthcare in this country?

2 From the following list, which healthcare issue is most important to you?

3 Thinking about how you have experienced healthcare in the past year, how would you rate your overall experience?

4 Overall, how important is it that you have a good patient experience?

5 Why is having a good patient experience important to you?

CORE FINDINGS

Consumer Ratings for Quality Of Care & Experience Slip as COVID-19 Pandemic Continues

Consumer ratings for the quality of healthcare in America, while declining slowly over the last 9 months of 2020, dropped significantly during the first part of 2021. Since Q4 2020, we saw a 10-point drop in consumers who believe healthcare quality is "very good" or "good." (Figure 1) The decline is most likely reflective of both the second major COVID-19 peak in new cases over this time period and the reduction in the "halo effect" many healthcare organizations experienced in the early days of the COVID-19 crisis. These factors seemingly impacted people's perspective on experience as well. (Figure 2) While overall care experience was stable in the last three quarters of 2020, there was a 5-point drop in consumers who felt their overall experience during the early months of 2021 was "good" or "very good."

Importance of Healthcare Costs on The Rise For Consumers

Consumers continue to cite costs as among the most important healthcare issues to them. The top three issues remain unchanged since Q4 2020. They include "having affordable insurance options," "out-of-pocket healthcare costs," and "cost of health insurance premiums." All three items saw an increase in Q2 2021 compared to Q4 2020 as well. "Having affordable insurance options" remains the top issue for consumers, followed by "cost of insurance premiums." "Out-ofpocket costs" rebounded from a downward trend to mid-2020 numbers, likely driven by the direct financial impact of COVID-19 on consumers. (Figure 3)

Experience Holds Steady in Importance As Do The Reasons Why

While consumers' rating on the importance of experience slightly bumped up during the start of the two major spikes in COVID-19 cases in 2020, we find that consumers still find experience to be of great importance to them overall at 94% this quarter. (Figure 4)

Figure 1. Quality of Healthcare in America
% that report 'Very good' or 'Good'

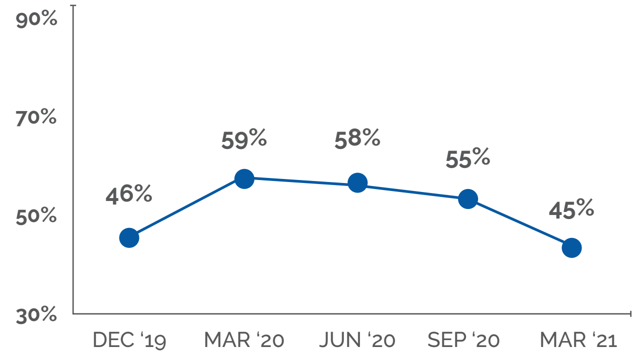


Figure 2. Overall Care Experience in the Past 12 Months
% that report 'Very good' or 'Good'

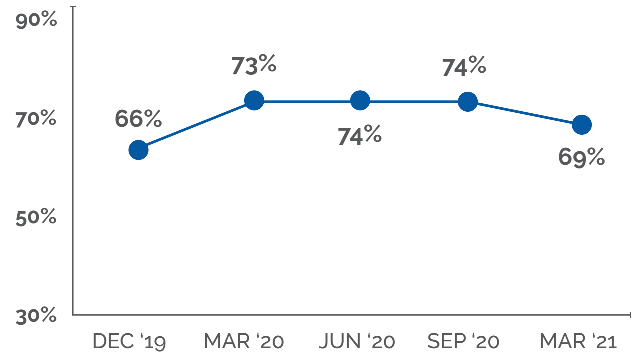
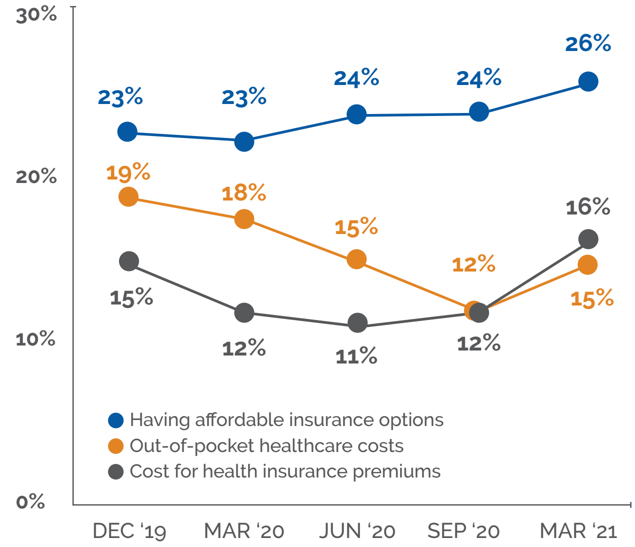


Figure 3: Which healthcare issue is most important to you? Top 3 Issues



Why experience is important also seems to hold relatively consistent as well, with the top 5 factors remaining steady since we began collecting PX Pulse data in Q4 2019. (Figure 5) Over the period since December 2019, we have seen slight increases in the measures of "physical needs being taken seriously," "good patient experience contributes to my healing/good healthcare outcomes" and "I want to be addressed as a person, not as a symptom, diagnosis or disease." These perspectives linking personal engagement to outcomes seem to relate to the pandemic year and human vulnerabilities we all experienced.

At the same time, we saw a slight drop in "my health and wellbeing are important to me," which still remains the highest rated item by consumers overall, as well as a dip in "I want/deserve to be treated with respect." On the latter, the insight here is that in a time of crisis, people were potentially more forgiving in how they were treated overall.

Figure 4. Overall, how important is it that you have a good experience as a patient?
% that report 'Extremely important' or 'very important'

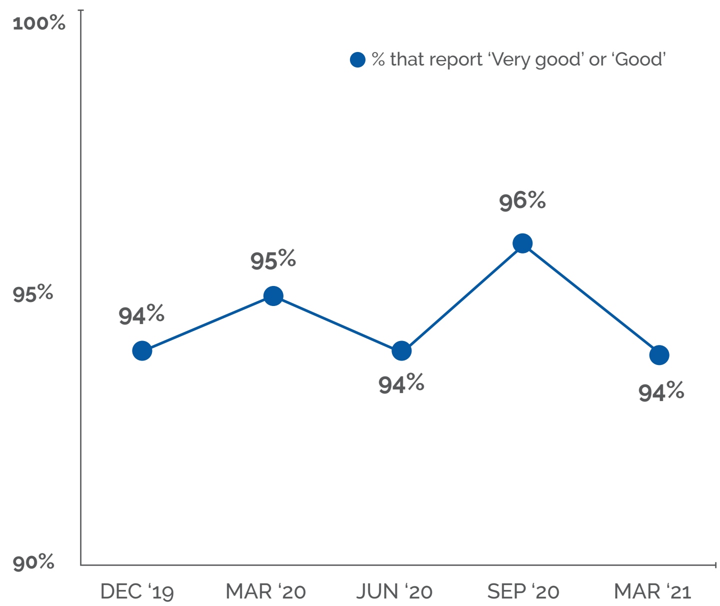
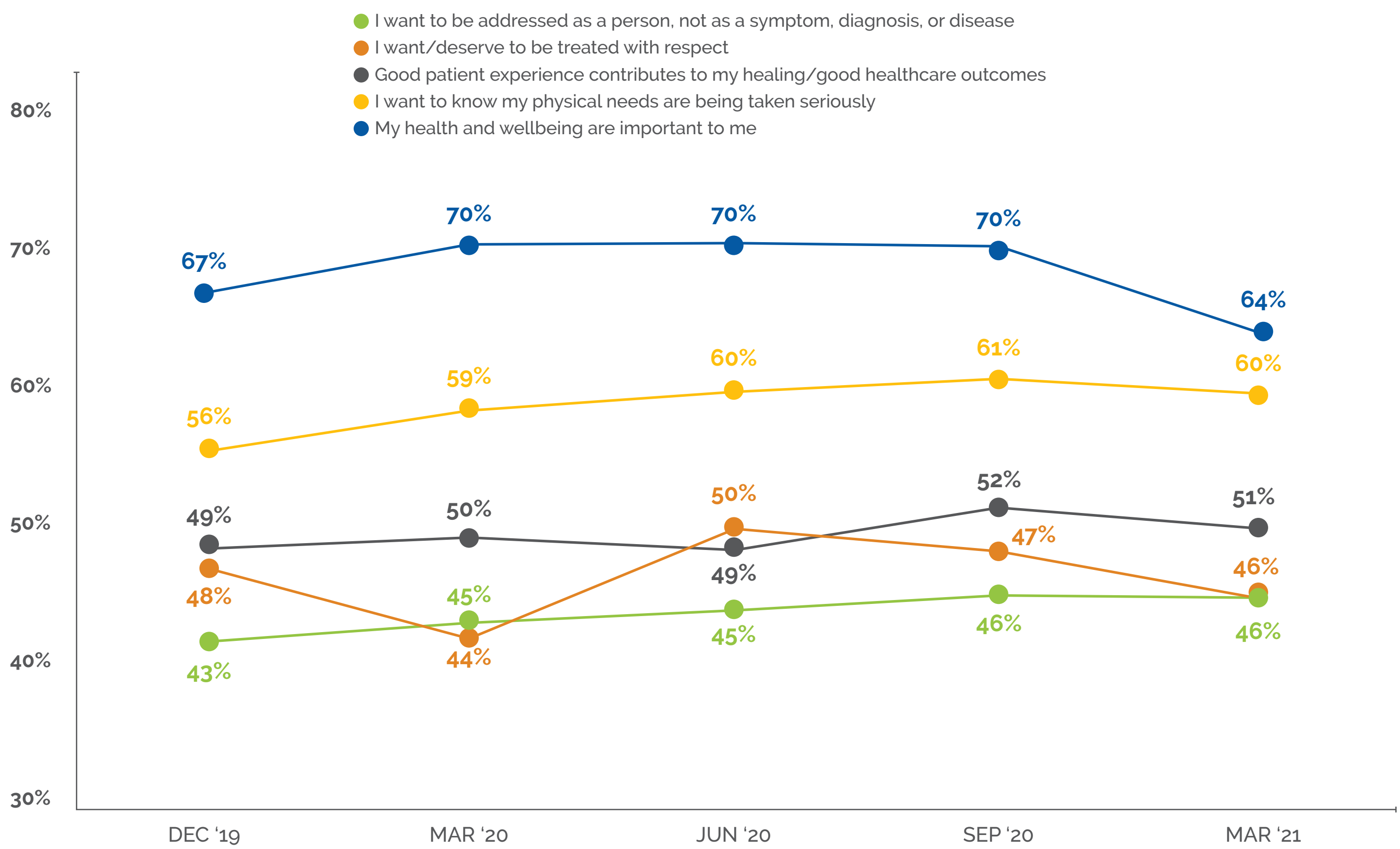


Figure 5. Why is having a good patient experience important to you?
% that reported selected responses



Fewer Negative Perspectives of Government Agencies Emerge As Protocols Tighten

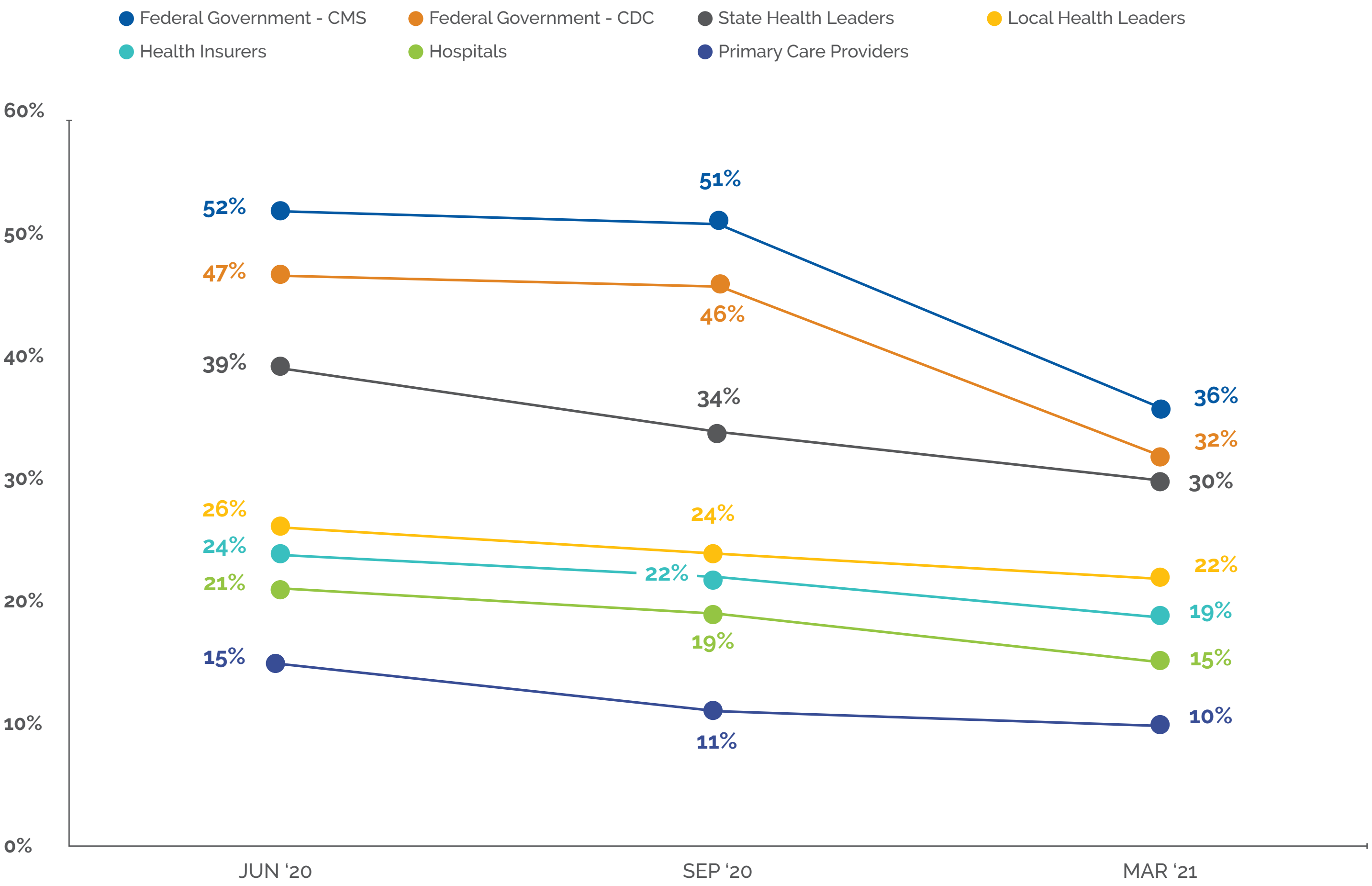
Consumers' perspective of healthcare actors in the U.S. during the pandemic reflect a significant change from Q4 2020. While consumers continue to hold a range of perspectives about government healthcare officials, fewer consumers feel these entities made COVID-19 "worse" or "much worse" in Q2 2021. The greatest drop is reflected in perspectives toward federal government agencies, specifically Centers for Medicare & Medicaid Services (CMS) and CDC. Less significant changes are reported for state and local leaders, health insurers, hospitals and primary care providers. (Figure 6)

Of particular note is the drop in negative perception of the "Federal Government – CMS," a decrease in negative response of 15 points and "Federal Government – CDC," a decrease of 14 points. This drop in consumers with a negative perspective is likely attributable to healthcare consumers' increased confidence in the government's COVID-19 response, transparent communications and policies and recommendations to control the virus in the earlier months of 2021. In complement to this data point, we also saw consumers report an 11-point increase in response on the perspective of that "Federal Government – CDC" made things "better" or "much better," jumping from 15% to 29%..

Comfort of Consumers to Seek Healthcare Stalled

The comfort level of consumers to seek healthcare in Q2 stalled compared to the upward trend reported between the last two quarters of 2020. This may reflect a greater

Figure 6. How has COVID-19 changed your perspective of the following healthcare actors in America? % that report 'Made it much worse' or 'Made it worse'



sense of caution of consumers as they learn to navigate the realities of the continued COVID-19 crisis. Of all healthcare services, primary care and local hospitals only saw slight increases of consumer comfort, while feeling comfortable returning to a specialist provider or to visit an ER or urgent care facility remain neutral. A major change in comfort occurred with consumers regarding visiting a lab for medical tests. While significantly more consumers (+9%) reported feeling "extremely comfortable" to visit a lab between Q3 and Q4 of 2020, in contrast, fewer consumers report feeling this way in Q2 2021. As COVID-19 lingers, this plateau in number of consumers who are comfortable returning to healthcare settings may be reflective of a lack of confidence in infection prevention protocols put in place by providers and lack of adherence to masking and other safety mandates by non-complying consumers. (Figure 7)

COVID-19 Vaccine Hesitancy Still An Issue

While increasing studies reflect the reality that portions of the U.S. population will not seek to get the COVID-19 vaccine, a majority (59%) in our study reported they will "definitely get a vaccine." With that, consistent with other data, one in five consumers continue to show hesitancy toward the COVID-19 vaccine across the U.S. saying they will "probably not" (9%) or "definitely not" (11%) get a vaccine. About 13% report they are "unsure of getting a vaccine." This reflects the ongoing public health conversations on the value and safety of vaccines, the need to ensure access to trusted information and a big question on the trust of both the federal government and health care in general. This moment reveals there are definitely further opportunities for communication and trustbuilding even in the face of growing confidence. (Figure 8)

Figure 7. At this time, how comfortable are you seeking healthcare services from the following?

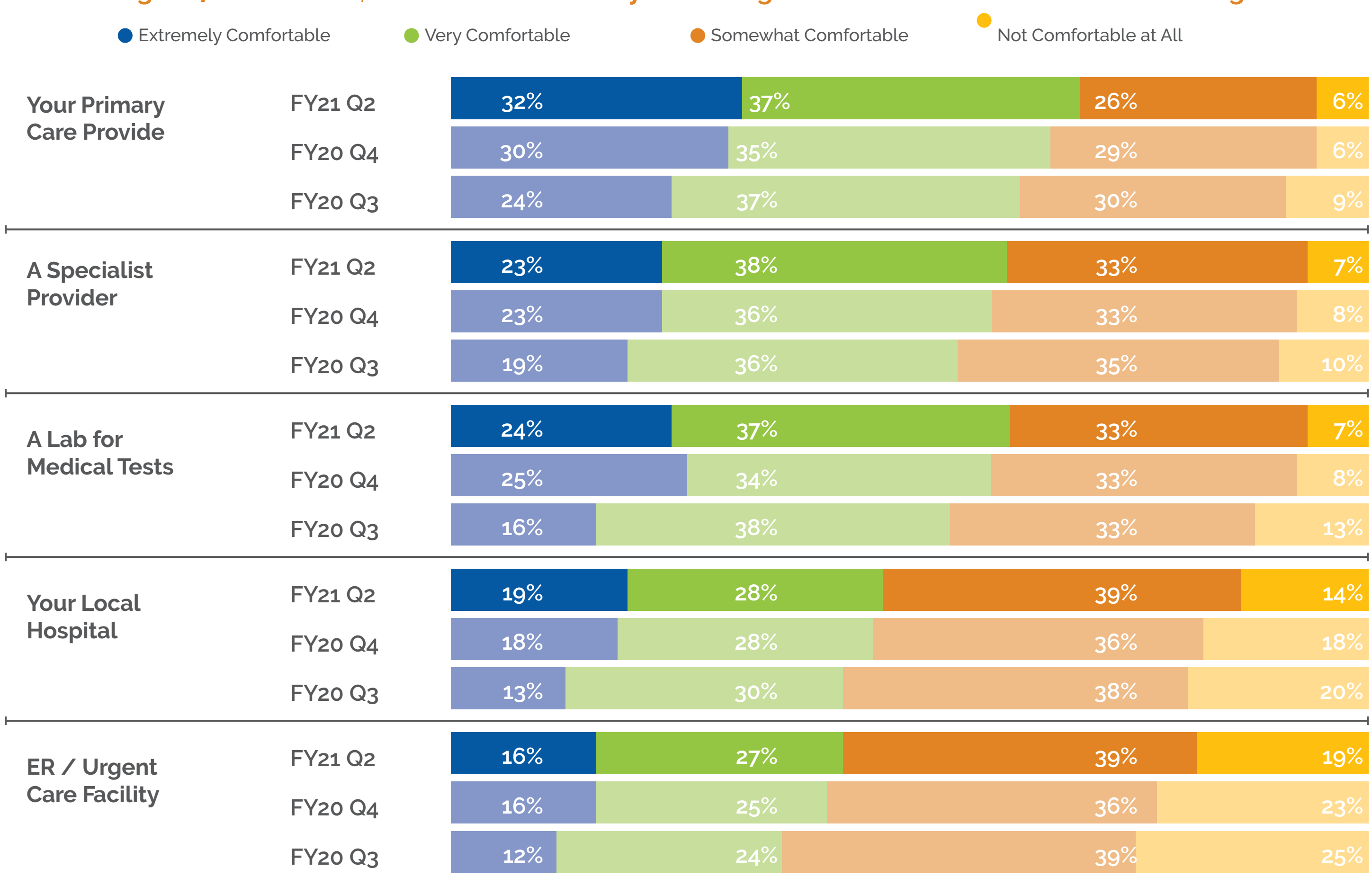


Figure 8. If a COVID-19 vaccine was made available to me, I would...

59% Definitely get a vaccine	9% Probably get a vaccine	13% Be unsure about getting a vaccine	9% Probably not get a vaccine	11% Definitely not get a vaccine

TAKEAWAYS

The Beryl Institute – IPSOS PX Pulse continues to put consumer voices and the human experience at the forefront of healthcare discussions. This issue shares a number of significant ongoing consumer insights for the industry across one of the most unique time periods in history, including the multiple waves of the COVID-19 pandemic, the early vaccination period and our emerging moment of hope and lingering feelings of uncertainty.

We know COVID-19 had a major impact on healthcare overall, and through this inquiry we have learned the crisis also influenced consumer perceptions of care. In fact, the number of consumers feeling positive about overall healthcare quality and their own care experiences decreased slightly during the course of COVID-19 through 2020 and into 2021 after a subtle positive bump. The financial and economic impacts on consumers brought on by the pandemic are well known, and it is not surprising to see again in this survey what we reported in our Q4 PX Pulse about what is important to consumers. Healthcare costs remain the top issues of importance, with increases in consumers reporting "out-of-pocket costs" and "cost of health insurance premiums" as most important to them.

Additionally, through the pandemic and as we slowly open up communities to some sense of normalcy, consumers have expressed a wide range of perceptions about the impact of COVID-19 on healthcare actors. The good news is fewer consumers feel the pandemic has made their perspective on these players worse or much worse, and more consumers feel the crisis has made their perspective better or much better. Consumer perspective of federal agencies saw the greatest change in both these categories with a significant shift in positive perception in the first quarter of 2021.

Even with COVID-19 waning and lifestyles normalizing, consumer comfort in returning to their healthcare providers is stalled. Compared to the major increases seen between Q3 to Q4, consumers comfortable seeking care from primary care or hospitals only slightly increased, and comfort in ER and urgent care visits remain neutral since last reported. Of note is that consumers comfortable with visiting a lab for medical tests actually dropped in Q2 2021, a change in direction from the significant increase in consumers who said they were extremely comfortable going to a lab between Q3 and Q4. Across the U.S., differing state mandates on mask-wearing and social distancing may play a part in this lack of confidence in seeking care.

While the number of shots in arms of people in the U.S. have slowed for a variety of reasons, the majority of consumers in this inquiry report they would get the COVID-19 vaccine if available to them. This suggests access to shots and ease in scheduling an appointment may have opportunity for improvement in America. Of greater concern is vaccine hesitancy in the U.S. related to consumer uncertainty and various opinions including denial about the virus. Moving through this pandemic lies in helping the 13% of consumers who report they are "unsure about getting the vaccine" to feel a greater sense of confidence and understanding in why this could benefit our communities. Any positive movement in that direction will have some impact as well on the 20% who right now report they will most likely not seek a vaccine at all.

In all that we continue to see most in the trends is that healthcare consumers believe the experience they have remains important. While the percentage slightly moved up over the pandemic, we find ourselves now in the midst of the second year of managing this crisis with a clear statement on the importance of experience overall. From when we started reviewing data in December 2019 prior to the arrival of COVID-19 until now, we still find 94% of consumers see experience as "extremely important" or "very important" to them. The sustained consumer statement of the importance of experience over the last year should reinforce that a commitment to experience must not waver.

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