THE BERYL INSTITUTE – IPSOS PX PULSE: CONSUMER PERSPECTIVES ON PATIENT EXPERIENCE IN THE U.S.

April 2020

THE BERYL INSTITUTE

Ipsos

THE BERYL INSTITUTE

The Beryl Institute is the global community of practice committed to elevating the human experience in healthcare. We believe human experience is grounded in experiences of patients & families, those who work in healthcare, and the communities they serve.

We define the patient experience as *the sum of all interactions, shaped by an organization's culture, that influence patient perceptions across the continuum of care.*

You can follow The Beryl Institute on LinkedIn, Facebook, and Twitter (@BerylInstitute). Visit The Beryl Institute website at www.theberylinstitute.org.

Ipsos

Ipsos is the third largest social science and market research firm in the world, with offices in 89 countries and over 18,000 employees who are passionately curious about people, markets, brands, and society. We have more than 30 years of experience working with physicians, hospitals, payers, brokers, and healthcare organizations on improving healthcare quality, increasing accountability, and advising on new and emerging health policy issues.

For more information on Ipsos' patient experience and healthcare contributions, you can follow Ipsos Public Affairs on LinkedIn and Twitter (@IpsosPA).

INTRODUCTION

TRACKING CONSUMER PERSPECTIVES ON PATIENT EXPERIENCE DURING A GLOBAL PANDEMIC

Since the inaugural release of The Beryl Institute – Ipsos PX Pulse in January 2020, the healthcare sector around the world has been rocked by a global pandemic. This outbreak of *coronavirus disease 2019* (abbreviated to "COVID-19") has led to unprecedented changes in people's lives as many governments implement aggressive social distancing rules to attempt to slow the spread and avoid overloading healthcare systems. For the healthcare sector specifically, this outbreak has a number of implications, including mounting worries about staffing and resource shortages, a shift to telemedicine where possible, and even perhaps an altered lens through which consumers view the industry and their experiences with it.

Even in this crisis context, patient experience remains an important topic. As providers and payers adapt to new and different methods of care delivery, consumers are grappling with unprecedented levels of uncertainty and fear about their health, their loved ones, and their futures. On both sides of the healthcare sector, the human experience remains critically important, as does considering all interactions taking place across the evolving continuum of care. Thus, even as the industry is focused on fighting this global pandemic, continuing to monitor patient experience and related issues such as quality, safety, costs, and access provides valuable insights into the current state of consumer sentiment and any significant changes in trends over time.

This second release of The Beryl Institute - Ipsos PX Pulse presents an updated look at patient perspectives while continuing to provide a common language by which to discuss the rapidly changing nature of healthcare experiences in the United States. Specifically, this report tracks changes on core questions since the previous quarter and provides a deep dive into three new, timely topics: acute care/ hospital experiences, factors influencing hospital use, and consumer preferences related to telemedicine.

ROADMAP

NEW INSIGHTS DELIVERED QUARTERLY

The Beryl Institute – Ipsos PX Pulse publishes findings quarterly, sharing new insights from consumers about healthcare that will further elevate the conversations around patient experience.

The survey asks five core questions that will track consumer perspectives on patient experience and healthcare overall.

PX Pulse helps ensure that as the conversation on human experience in healthcare continues to expand, a focus on the needs of the consumer remains central to the evolving healthcare system.

In addition, each quarterly report features a deep dive into consumer experiences within specific health settings, including primary care, hospital care, emergency and urgent care, as well as post-visit care. Consumers will also be asked about specific dimensions of care, including access, cost, and use of telemedicine.

A roadmap for The Beryl Institute – Ipsos PX Pulse 2020 publications and the insights to be included are outlined below.

Core Questions Asked Each Quarter

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?

Release Month:	January Public Release	April Public Release	July Public Release	October Public Release
Healthcare Setting-specific Questions	Primary Care	Acute Care / Hospital	Emergency Room / Urgent Care	Following Guidance about At-home / Post-visit Care
Domain-specific Questions	Access & Cost Provider Communication	Factors Influencing Hospital Use Telemedicine Practices	Scope of Consumer Practices Telemedicine Portals	Framing Patient Experience

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, 1,004 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from March 10th through March 20th.

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. Individuals who stayed at a hospital overnight were oversampled to obtain robust estimates for the hospital experience sections. 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 oversampling.

CORE FINDINGS

ALTHOUGH CONSUMERS ARE ENGAGED IN LESS HEALTHCARE ACTIVITIES, THEY ARE MORE POSITIVE ABOUT OVERALL HEALTHCARE QUALITY

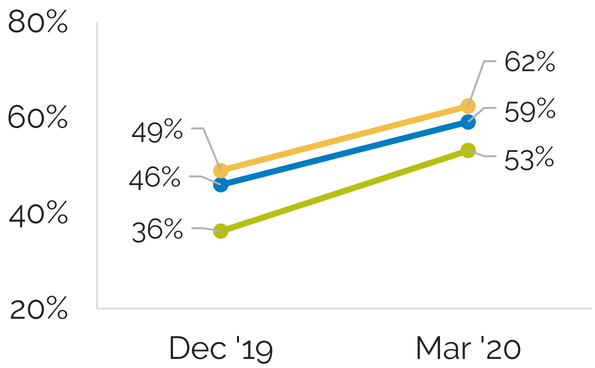
With the COVID-19 pandemic and the increasing number of stay-at-home orders, it might not come as a surprise to see that consumers are engaged with less healthcare activities this quarter compared to last quarter. There are significant decreases across the board for healthcare activities, with the largest drops seen for visits to labs for medical tests (-14%) and visits to a specialist provider (-13%). The only healthcare activity that remained stable from last quarter is visits to the emergency room/urgent care facility.

Despite the lower level of engagement in healthcare activities and the spread of COVID-19, consumers are more positive about the overall quality of healthcare in the United States. This holds true when looking at ratings for respondents overall, respondents who reported a recent healthcare visit, and respondents who did not report a visit. Similarly, we see that consumers are more positive about their overall care experience across the aforementioned three groups, though the increase is not as stark as ratings for overall healthcare quality.

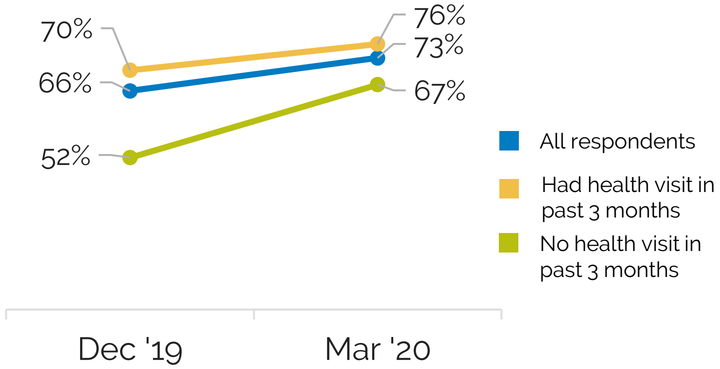
Have you done any of the following healthcare activities in the past 3 months?	Dec '19	Mar '20	% Diff
Visited your primary care provider	61%	52%	-9% *
Stayed in a hospital overnight	10%	6%	-4% *
Visited a specialist provider	47%	34%	-13% *
Visited an emergency room/urgent care facility	24%	20%	-4%
Visited a lab for medical tests	50%	36%	-14% *

An asterisk (*) in the "% Diff" column denotes statistically significant differences between quarters

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



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



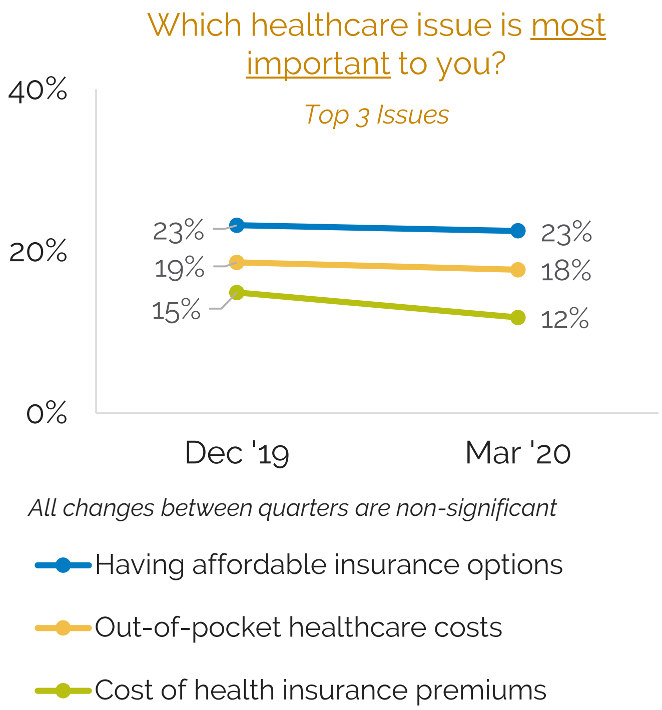
All changes between quarters are statistically significant

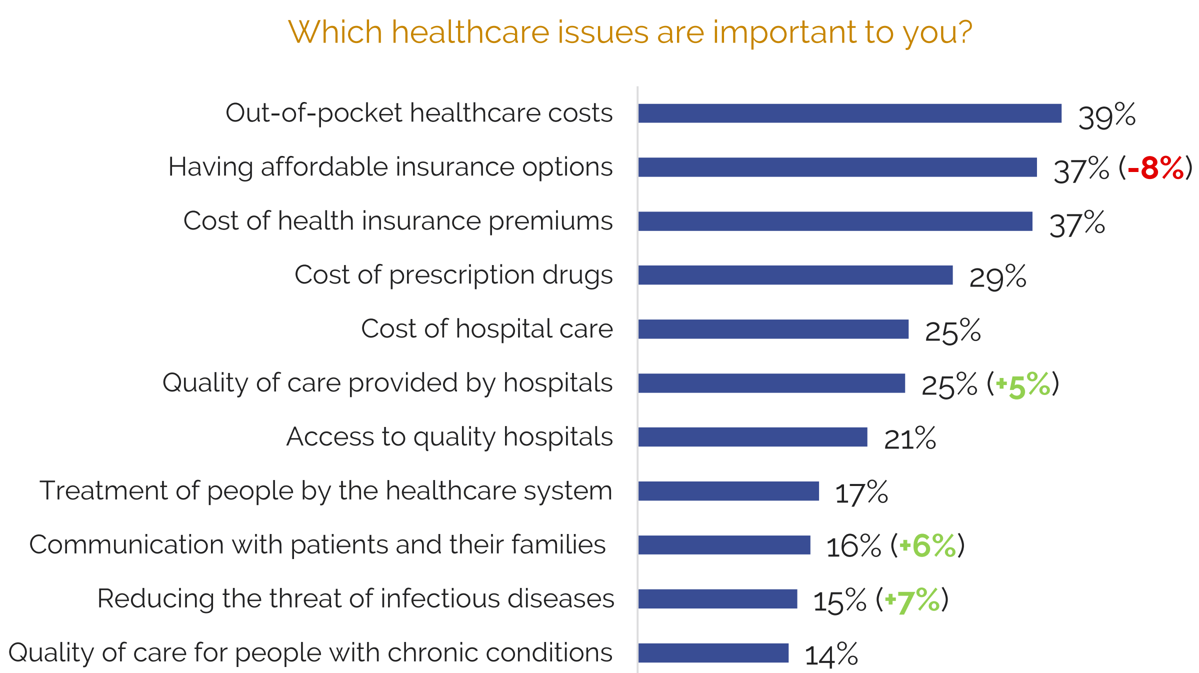
COST REMAINS THE MOST IMPORTANT HEALTHCARE ISSUE FOR CONSUMERS

Consumers continued to cite costs as among the most important healthcare issues to them. The top three most important issues include having affordable insurance options, out-of-pocket healthcare costs, and cost of health insurance premiums. The proportion of individuals that cite these issues as important remained stable from last quarter.

REDUCING THE THREAT OF INFECTIOUS DISEASES EMERGES AS THE TOP GROWING HEALTHCARE ISSUE FOR CONSUMERS

Although cost remains as the top healthcare issue for consumers, there are a few healthcare issues that emerge as more important to consumers this quarter compared to last quarter. Chief among these include reducing the threat of infectious disease, with 7% more consumers citing this as an important issue to them. This is followed by communication with patients/families (+6%) and the quality of care at hospitals (+5%). Concerns around the COVID-19 outbreak may likely be driving the increased importance placed on these issues, reflecting the values of consumers during these times.





All statistically significant differences between quarters are shown in parentheses

CONSUMERS CONTINUE TO SAY THAT PATIENT EXPERIENCE MATTERS TO THEM

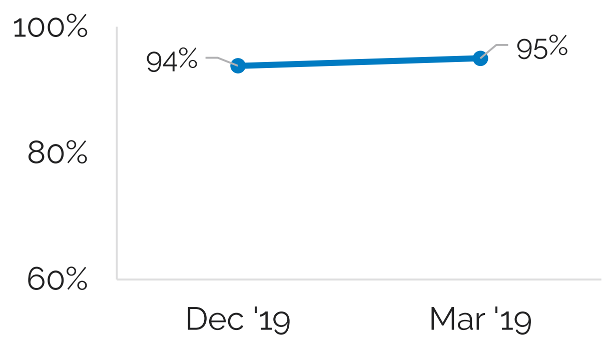
Healthcare consumers continue to say that having a good experience is important to them as patients. **Nearly 95% of people affirm that good patient experience is either "very important" or "extremely important."** This finding remains stable from the last quarter.

The top reasons stated for why good patient experience is important to consumers remain stable from the last quarter as well. These include their health being important to them, knowing that their physical needs are being taken seriously, and believing that good patient experience contributes to good healthcare outcomes. Consumers were less likely to say that they see themselves as customers, with a decrease of 8% saying that this is one of the reasons why patient experience is important to them.

The academic research consistently indicates that patient experience is positively associated with a wide range of important clinical care outcomes. These associations can be found across a wide range of disease areas, settings, outcome measures, and study designs. Additionally, patient experience matters as an end in itself. At the human level, the findings continue to support consumers' desire to be treated with respect and as a person—in line with the overall mission of healthcare.

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

% that report 'Extremely important' or 'Very important'



All changes between quarters are non-significant

Why is having a good patient experience important to you?

All statistically significant differences between quarters are shown in parentheses

"Healthcare professionals should treat people as they would want to be treated themselves"

HOSPITAL EXPERIENCES

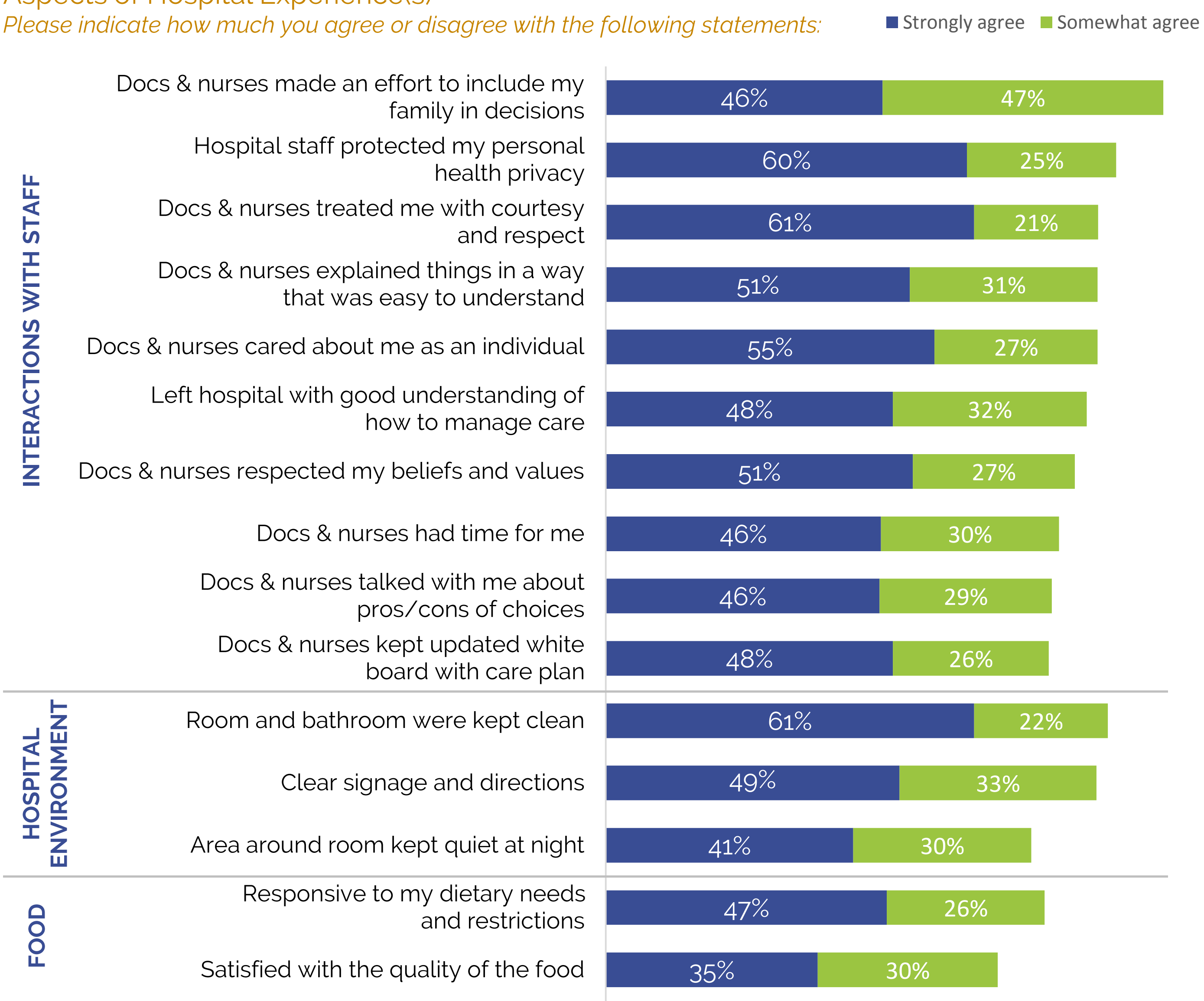
CONSUMERS ARE HIGHLY POSITIVE ABOUT THEIR EXPERIENCES IN HOSPITALS FOR OVERNIGHT STAYS

Even amidst the COVID-19 outbreak and mounting worries about hospital resources, **85% of consumers were "very" or "somewhat" satisfied with their experience(s) in the hospital**. Of participants who stayed in a hospital overnight or who care for someone who did in the last three months, a majority (68%) report only one hospital stay during that time. About a third (37%) stayed for only one night, while another third (30%) stayed for two or three nights.

Across the board, participants also give high ratings on various elements of these experiences, including interactions with staff, aspects of the hospital environment, and the food. Of all aspects of the hospital experience, the lowest proportions of consumers agreed to being satisfied with the food.

Aspects of Hospital Experience(s)

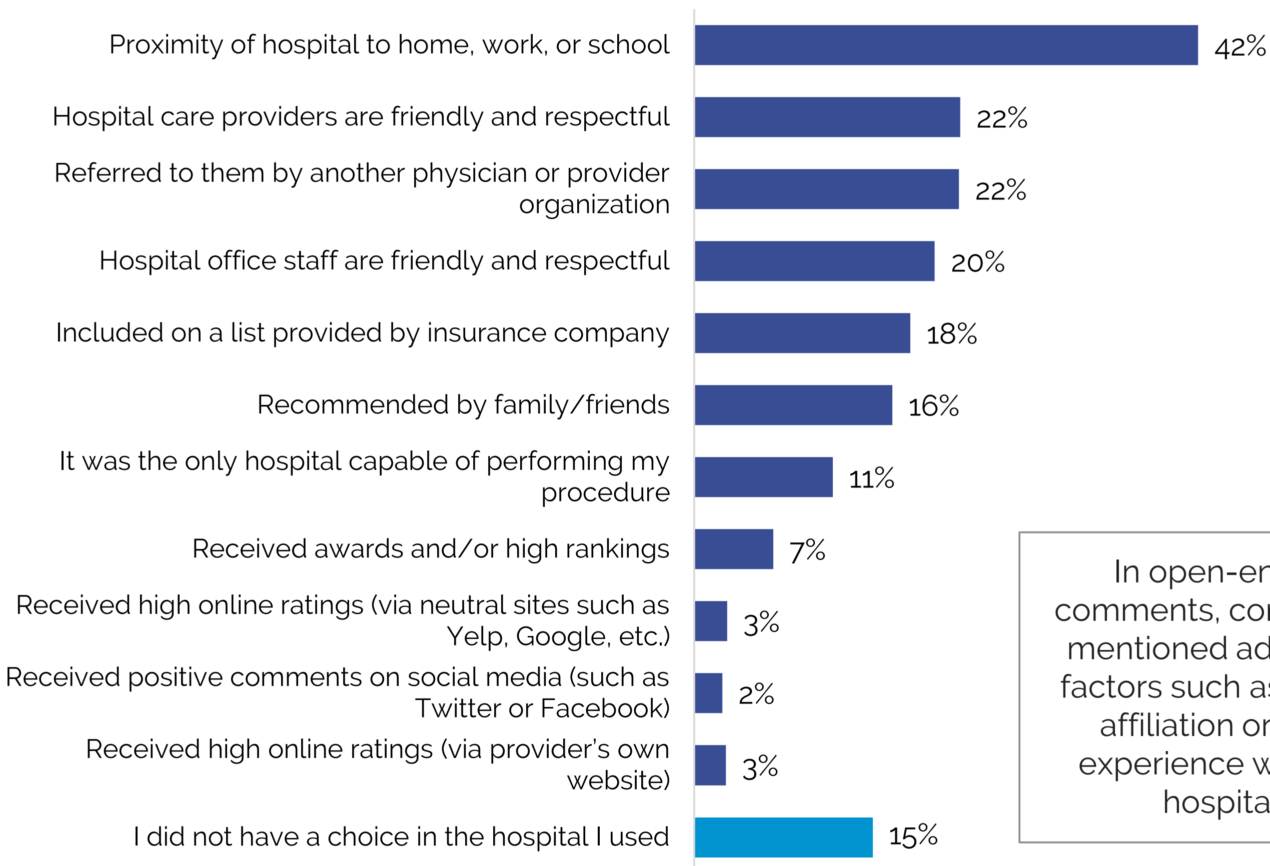
Please indicate how much you agree or disagree with the following statements:



PROXIMITY IS MOST COMMON REASON FOR HOSPITAL CHOICE

Above all, convenience is the most important aspect for consumers when it comes to hospital stays, with 42% citing proximity to home, work, or school as a reason for choosing their specific hospital. Friendliness and respectfulness of care providers (22%) and office staff (20%) are also important factors in this choice. While referrals from within the healthcare industry (22%) and recommendations from family or friends (16%) are important in this choice, external information such as rankings/awards, online ratings, and social media are not commonly cited as important. About 15% of consumers report that they did not have a choice in the matter.

Why did you choose your specific hospital?



In open-ended comments, consumers mentioned additional factors such as doctor affiliation or prior experience with the hospital.

BEST PART OF HOSPITAL EXPERIENCE

"Great communication between me and the nurses and doctors"

"The nurses were very nice and helpful"

"The treatment and attention to care the hospital provided"

THINGS THAT WOULD MAKE IT BETTER

"Being able to get a solid answer as to how to treat the injured area"

"If the doctors listened and treated me with respect instead of rushing out of the room not listening"

"Not having to be checked so often, which disturbed my sleep"

HOSPITAL USE

CONSUMERS ARE MORE LIKELY TO CHOOSE THE HOSPITAL CLOSEST TO THEM TO TREAT INJURIES AND SEVERE ILLNESS OVER GETTING SURGERY, CHRONIC TREATMENTS, OR FOR PREGNANCY

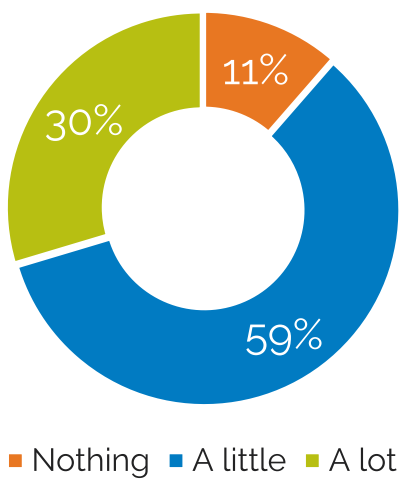
When asked about their familiarity with the hospital closest to them, the majority of consumers say they know only a little about that facility (59%) while a few reported knowing nothing at all (11%).

As a follow-up, consumers were asked about whether they would visit their nearest hospital for different circumstances. The two scenarios where consumers felt they were “Very likely” or “Somewhat likely” to visit their nearest hospital were to treat an injury (78%) or sudden severe illness (73%).

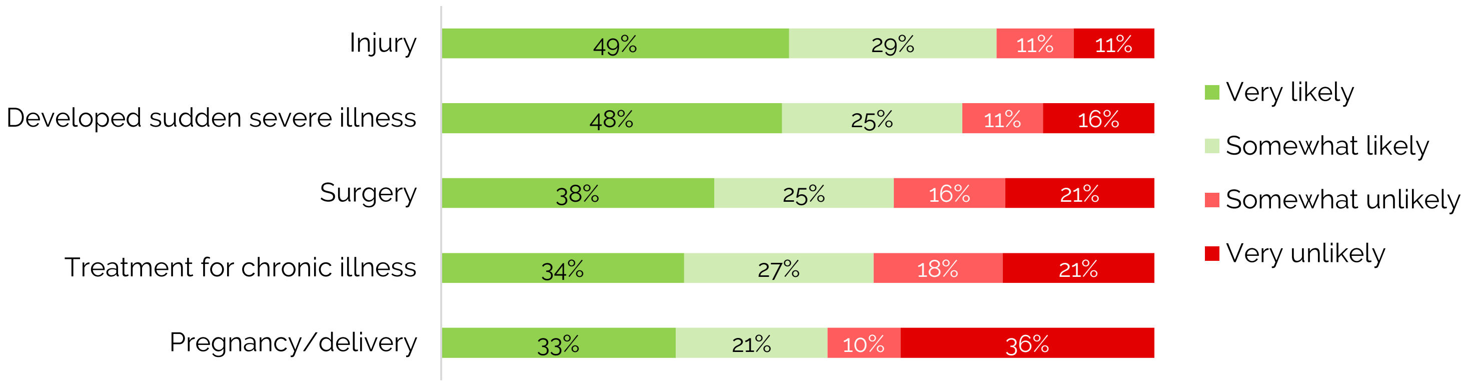
Consumers were less likely to visit their nearest hospitals for surgery (63%), getting treatment for chronic illness (61%), and pregnancy (54%). These findings suggest that consumers are more likely to research the right facility to use when they are better able to plan ahead for treatments and procedures. When the cause for a visit is sudden, the hospital nearest to them would fulfill their needs.

The main reasons consumers did not go to the hospital nearest to them was due to having “bad experiences there in the past” and experiencing “bad service and long wait times.”

Thinking about the hospital closest to you, how much do you know about this facility?



Please indicate how likely it would be for you to go to the hospital closest to you for each of the following circumstances:



TELEMEDICINE

ABOUT ONE-THIRD OF CONSUMERS PREFER VIDEO CONFERENCE CALLS OVER IN-PERSON VISITS FOR HEALTH-RELATED SERVICES

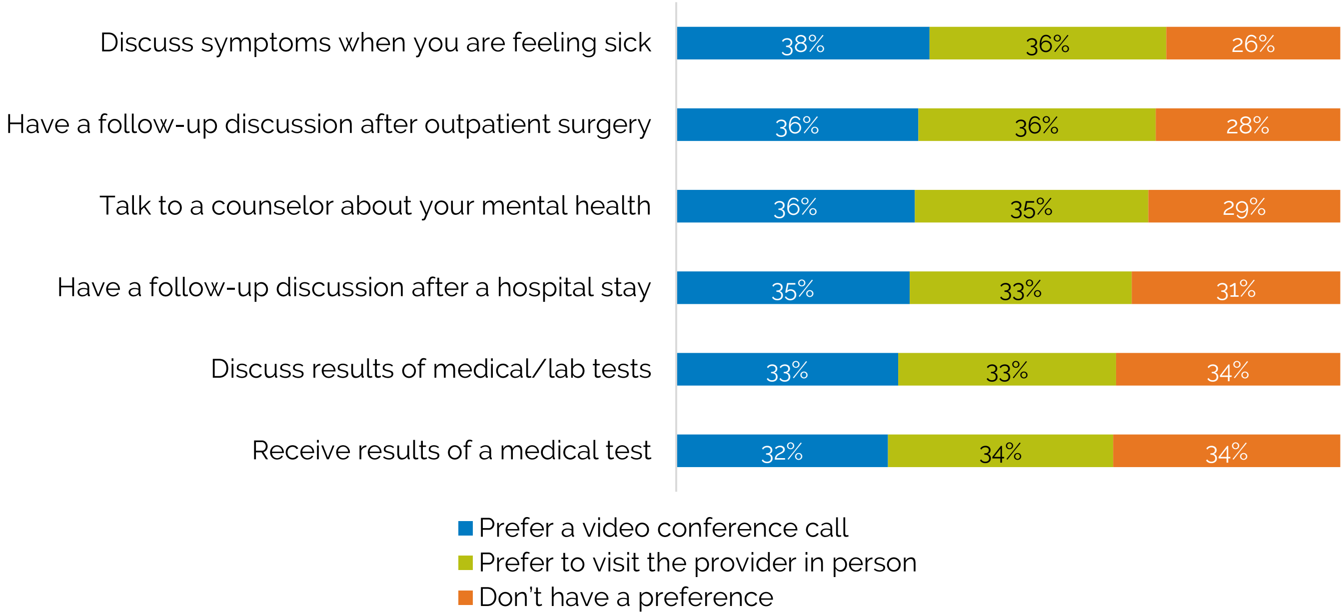
When given different medical scenarios, ranging from mental health to discussing symptoms of general illness, about one-third of consumers indicated that they would prefer video conferences over in-person visits to receive those services. Another one-third indicated that they had no distinct preference in receiving the service through a video conference call or with an in-person visit.

Out of the six health-related scenarios presented to consumers, the highest preference for telemedicine was shown for discussing symptoms when sick (38%). The lowest preference for telemedicine was shown for when a consumer was receiving and discussing medical/lab test results with their provider (32%).

The emergence of telemedicine in recent years has allowed providers the opportunity to connect with consumers outside their office, which helps to create personal connections and maintain open channels for treatment-related questions.

With the recent outbreak of COVID-19 and state-mandated stay-at-home orders across the United States, telemedicine allows the patient to continue to receive healthcare services from their provider in their own homes. With two-thirds of consumers indicating they prefer or are open to video conferencing for health services, healthcare providers that do not offer robust telehealth services have an opportunity to expand their reach with consumers.

For each of the following, please indicate whether you would prefer a video conference call, prefer to visit the provider in person, or have no preference:



IMPACT OF PATIENT EXPERIENCE

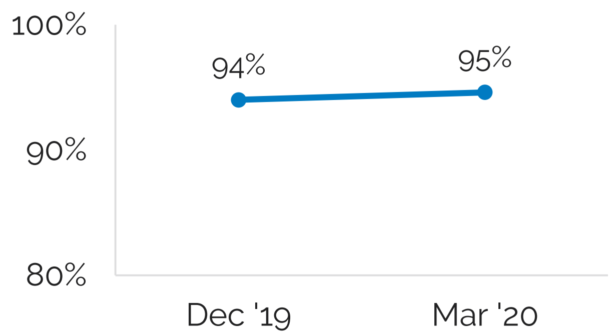
PATIENT EXPERIENCE CONTINUES TO PLAY AN IMPORTANT ROLE IN CONSUMER HEALTHCARE DECISIONS

The vast majority (95%) of consumers continue to indicate that patient experience is significant to decisions about their own or their family's healthcare—reinforcing the importance of promoting a positive patient experience.

In terms of impact, consumers continue to say they would use the same healthcare provider following other consumers experiencing a positive patient experience. Consumers with negative patient experiences were more likely to tell others about their experience, including friends, family, and their provider, as well as discontinue visits to that provider.

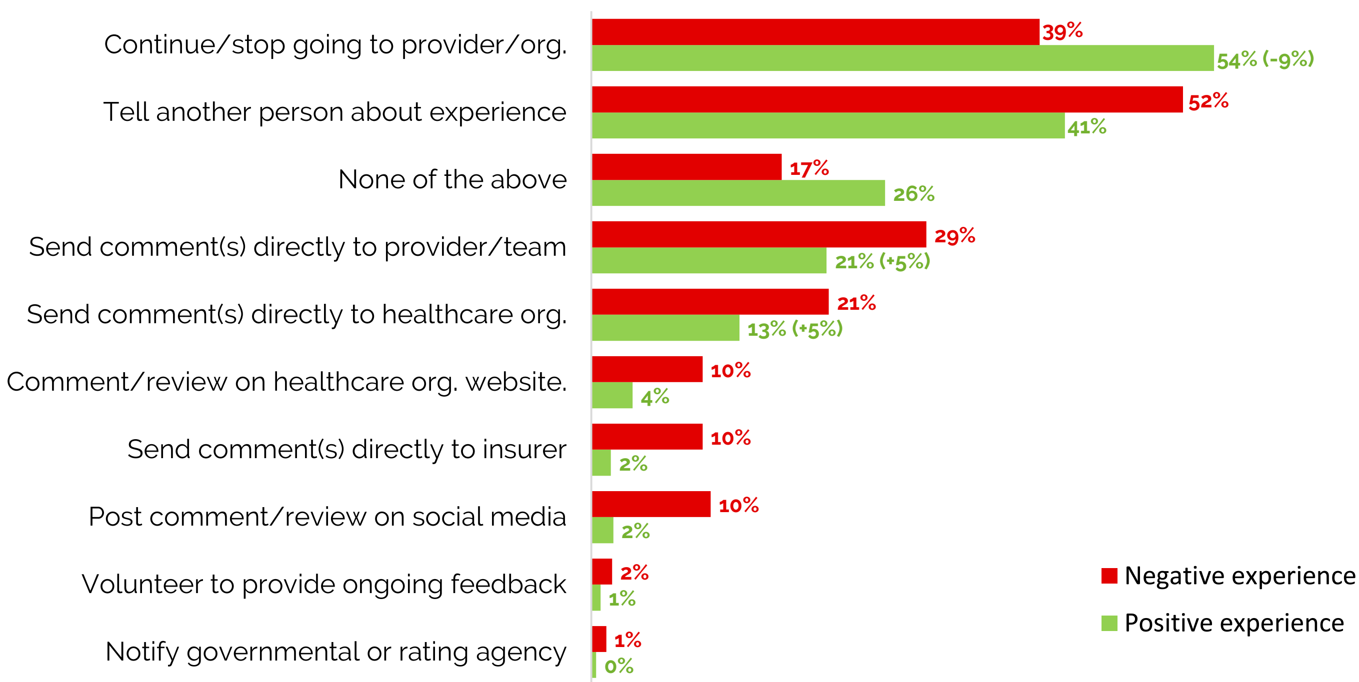
How significant is patient experience to your decisions about your healthcare or your family's healthcare?

% that report 'Extremely significant' or 'Very significant'



All changes between quarters are non-significant

Did you do any of the following as a result of your positive or negative experience?



All statistically significant differences between quarters are shown in parentheses

TAKEAWAYS

The Beryl Institute - Ipsos PX Pulse continues to put consumer voices and the human experience at the forefront of healthcare discussions. This publication shares a number of new consumer insights with the healthcare industry:

- Consumers are reporting fewer visits to primary care providers (-9%), hospitals (-4%), specialist providers (-13%), and labs (-14%).
- Despite lower engagement in healthcare activities and the spread of COVID-19, consumers are more positive about overall healthcare quality (+13%) and their own care experiences (+7%) compared to last quarter.
- Cost remains the most important healthcare issue for consumers. The top 3 issues remain stable from last quarter and include affordable health insurance coverage, out-of-pocket costs, and the cost of health insurance premiums.
- Reducing the threat of infectious diseases (+7%), communication with patients/families (+6%), and quality of hospital care (+5%) emerged as issues more important to consumers this quarter compared to last quarter.
- Consumers continue to say that patient experience is either “very important” or “extremely important” (95%).
- Consumers are positive about their hospital experiences, with around 85% reporting being satisfied with their stay. Consumers were positive across a variety of domains, with the least positive ratings relating to food service.
- Proximity is the most commonly cited reason for consumers picking their hospital for an overnight stay (42%).
- Consumers are more likely to use the hospital closest to them to treat an injury (78%) or sudden illness (73%) compared to getting surgery (63%), treatment for a chronic illness (61%), or for a pregnancy (54%).
- About one-third of consumers said they would prefer video conferencing over in-person visits for a variety of health services, while another third indicated they had no preference between the two.
- Patient experience continues to play a significant factor (95%) in consumer healthcare decisions this quarter.

A LOOK AHEAD AT THE INSIGHTS TO COME

The next quarter’s release will include a deep dive into consumer experiences with emergency rooms and urgent care centers. In addition, consumers will be asked about how often they engage with telemedicine portals as well as their preferences for receiving care from healthcare professionals. Additional topics will likely be explored as the COVID-19 situation develops.

PX Pulse will maintain its trending for the five core questions as well, which is even more important today given the unprecedented level of change seen globally due to COVID-19. As healthcare systems and providers continue their tireless efforts to treat those afflicted and curb the pandemic, the PX Pulse will help track the overall impact on consumer experiences and interactions with the healthcare system.

THE BERYL INSTITUTE

Ipsos