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

October 2020

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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.

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INTRODUCTION

TRACKING CONSUMER PERSPECTIVES ON PATIENT EXPERIENCE DURING A GLOBAL PANDEMIC AND IDENTIFYING WHAT ACTIONS MATTER TO EXPERIENCE EXCELLENCE

This report presents the fourth release of The Beryl Institute – Ipsos PX Pulse and the completion of our first full year. In tracking how things have changed since our July release, we see a slight rebound in people's reaction to the COVID-19 pandemic in terms of action and willingness to seek care. The driver of this could be slowing case trends this summer, peoples' need to return to care or desire for normalcy, among others.

Since this data has been collected, we again are seeing rising case counts in many localities, which reflects the highly dynamic and rapidly changing nature of the world in which we find ourselves and may have an impact on these improving trends in our next release.

Yet even with the complex dynamism of the healthcare space, some core ideas hold true to form as we have seen over this first year of inquiry. People remain steady in their belief that the experience they have in healthcare matters. It matters not only in the decisions they will make, but it matters in how they are treated both personally and clinically.

Respondents showed a sustained statement that experience is important and, in this release, the "why" is further revealed.

In asking people what they saw as part of their experience, a majority identified quality, safety, cost and outcomes. These ideas have been reflected in various questions explored in PX Pulse over this year.

This release reveals what actions really make the difference for people. First and foremost, consumers say they want to be treated as people. That is, they want to be listened to, communicated to in a way they can understand and treated with dignity and respect. They also express the desire to have a clear plan of care and the understanding of why they are taking that course of action.

This reflects a very critical piece of the experience conversation. People do not see themselves as passive travelers on a healthcare journey, but as active participants in a process of care in which consumers reinforce that the outcomes they achieve matter significantly. Consumers too were clear in their statement that they want safe, appropriate plans of care and look to achieve positive outcomes overall.

These ideas are reflective of the moments we have experienced through all of 2020. As we have delved into the challenging issues of social justice, equity and racism to the tenuousness of COVID-19, to a charged election cycle that has pulled at the edges of our humanity, PX Pulse has grounded us in what matters most to people overall. It is our personal needs for connection, for communication, for consideration and for a commitment to something bigger than ourselves. That is found in a fundamental commitment to human experience, and through our work with PX Pulse, we will remain focused on elevating this essential conversation.

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 remain 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.

The roadmap for The Beryl Institute – Ipsos PX Pulse 2020 publications and the insights that were covered 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 Disparities and Discrimination	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, 1,028 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from September 23 through October 5.

The survey was fielded 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. Individuals who received guidance about follow-up care at-home were oversampled to obtain robust estimates for this subpopulation. 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

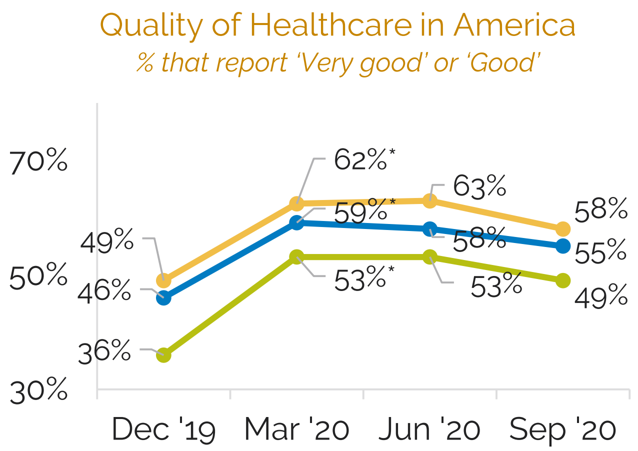
CONSUMERS ARE RE-ENGAGING WITH THEIR PRIMARY CARE PROVIDERS AND VISITING LABS FOR TESTS

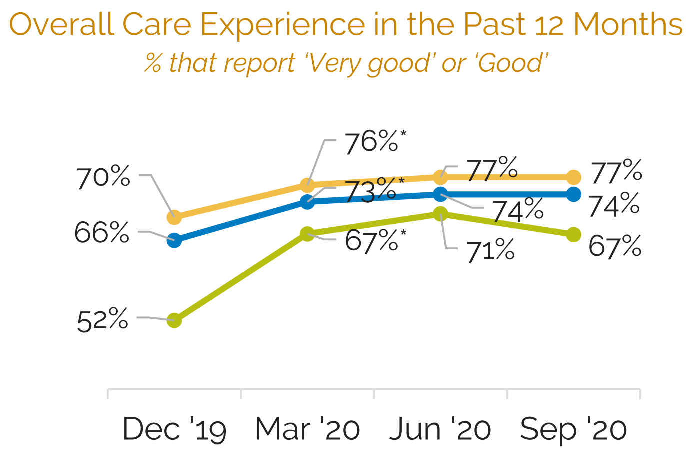
As we have covered in our previous PX Pulse releases, the COVID-19 pandemic and the various social distancing measures in place nationwide led to a decrease in consumer engagement with healthcare. However, our latest release suggests that engagement is re-bounding for certain activities. Since the previous quarter, we see statistically significant increases for consumers visiting their primary care providers (+12%), visiting a lab for tests (+10%) and staying at a hospital overnight (+2%).

Consumer ratings for the quality of healthcare in America and ratings of their overall care experiences within the past 12 months remain stable from the previous quarter. This remains true for those who had a recent healthcare visit and those who did not. Although non-significant, there is a decrease from the previous quarter in the amount of consumers that believe healthcare quality is "very good" or "good". This trend will be monitored closely as the battle against COVID-19 continues to develop.

Have you done any of the following healthcare activities in the past 3 months?	Dec '19 (Q1)	Mar '20 (Q2)	Jun '20 (Q3)	Sep '20 (Q4)	Change in % Q1 to Q4	Change in % Q3 to Q4
Visited your primary care provider	61%	52%*	35%*	47%*	-14	+12
Stayed in a hospital overnight	10%	6%*	3%*	5%*	-5	+2
Visited a specialist provider	47%	34%*	29%*	32%	-15	+3
Visited an emergency room/urgent care facility	24%	20%	12%*	13%	-11	+1
Visited a lab for medical tests	50%	36%*	29%*	39%*	-11	+10

An asterisk (*) denotes statistically significant differences from the previous quarter





All respondents | No health visit in past 3 months | Had health visit in past 3 months

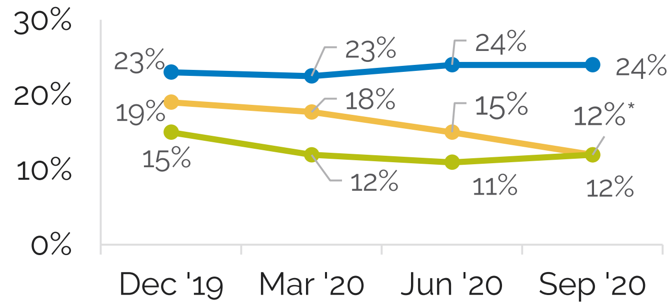
An asterisk (*) denotes statistically significant differences from the previous quarter

HEALTHCARE ISSUES RELATING TO COST REMAIN MOST IMPORTANT TO CONSUMERS

Consumers continue to cite costs as the most important healthcare issue to them. The top three most important issues changed compared to last quarter, as the importance of access to quality hospitals and treatments declined slightly among consumers. The top three most important healthcare issues for consumers this quarter include having affordable insurance options, cost of health insurance premiums and out-of-pocket healthcare costs.

Which healthcare issue is most important to you?

Top 3 Issues

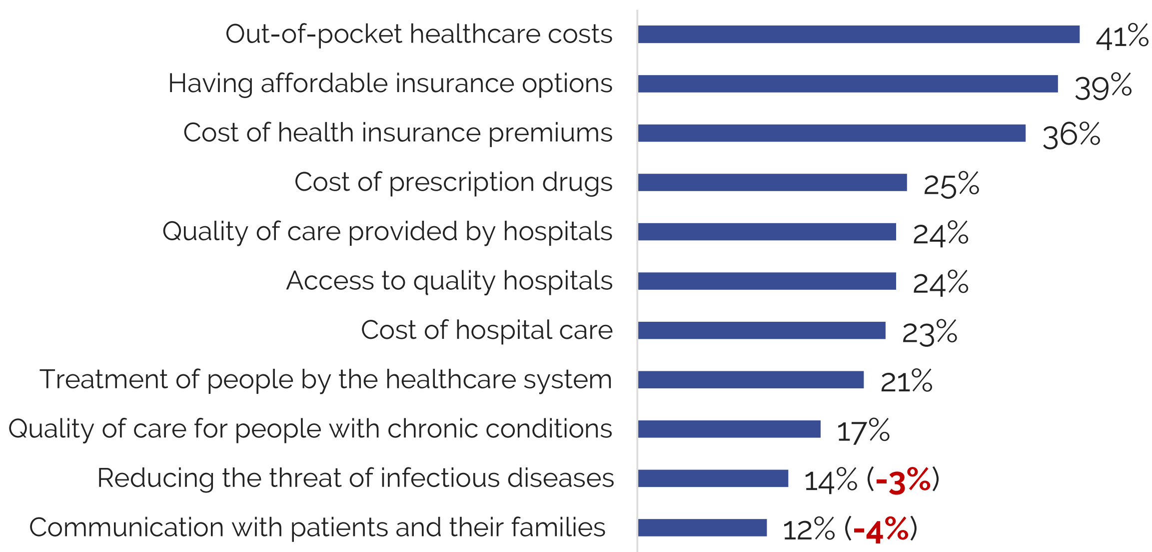


An asterisk (*) denotes statistically significant differences from the previous quarter

FEWER CONSUMERS ARE FINDING IT IMPORTANT TO REDUCE THE THREAT OF INFECTIOUS DISEASES COMPARED TO THE PREVIOUS QUARTER

Consumers continue to cite cost-related issues as important to them in healthcare. In previous PX Pulse releases, we also observed that reducing the threat of infectious diseases steadily increased in importance to consumers as the COVID-19 pandemic developed. In this latest quarter, we see a statistically significant decrease in the number of consumers that find this issue important (-3%). Moreover, we see a significant decrease in the number of consumers that say communication with patients and their families are important to them (-4%).

Which healthcare issues are important to you?



All statistically significant differences between Sep '20 and Mar '20 and are shown in parentheses

CONSUMER DEFINITIONS FOR MEANINGFUL PARTICIPATION IN CARE EXPERIENCES REMAIN SIMILAR TO LAST QUARTER

When asked which actions reflect meaningful participation in care experiences, a majority of consumers identify two items: having open access to their medical records (67%) and partnering with their healthcare provider on decisions related to their plan of care (54%).

As a healthcare consumer, which of the following actions reflect meaningful participation in your care experiences?

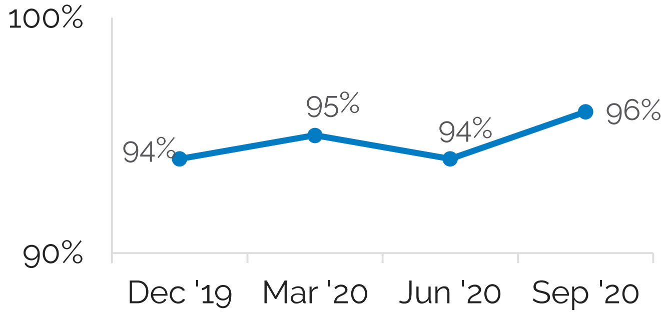
All changes between Jun '20 and Sep '20 are non-significant

HELP INFLUENCE HEALTHCARE DECISIONS AND CONTRIBUTE TO CONSUMER HEALING

Healthcare consumers continue to say that having a good experience is important to them as patients, with 96% of people affirming that a good patient experience is either "very important" or "extremely important". This finding remains stable from the last quarter.

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

% that report 'Extremely Important' or 'Very Important'



All changes between quarters are non-significant

The top two reasons stated for why a good patient experience is important to consumers remain that patients' health and wellbeing are important to them (70%) and knowing that their physical needs are being taken seriously (61%). Consumers are also slightly more likely to say that having a good patient experience will influence how they make healthcare decisions in the future (37%) and contribute to their healing outcomes (52%), with an increase of 3% for both responses since the previous quarter (statistically non-significant).

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

CONSUMERS APPEAR SLIGHTLY MORE COMFORTABLE SEEKING HEALTHCARE SERVICES DURING THE COVID-19 PANDEMIC

As COVID-19 infection rates were decreasing in certain regions across the country prior to this inquiry, in conjunction with new mask-wearing mandates, consumers report increases in their level of comfort seeking care from their primary care provider, specialist provider, lab, local hospital and emergency room/urgent care center. Consumers report being more comfortable visiting a lab for medical tests or visiting an emergency room/urgent care center, with a 5% increase in the number of consumers that said they were "extremely comfortable" or "very comfortable".

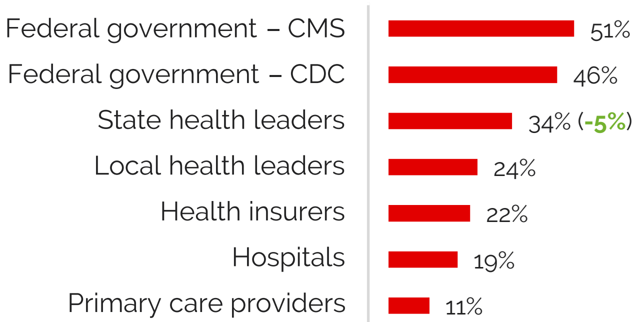
When asked what would make consumers feel more comfortable seeking healthcare services, common responses included *having a COVID-19 vaccine available, knowing that prevention protocols were being strictly followed and increased COVID-19 testing.*

GOVERNMENT AGENCIES SEE LARGEST DECREASE IN NEGATIVE PERCEPTION IMPACT DUE TO COVID-19

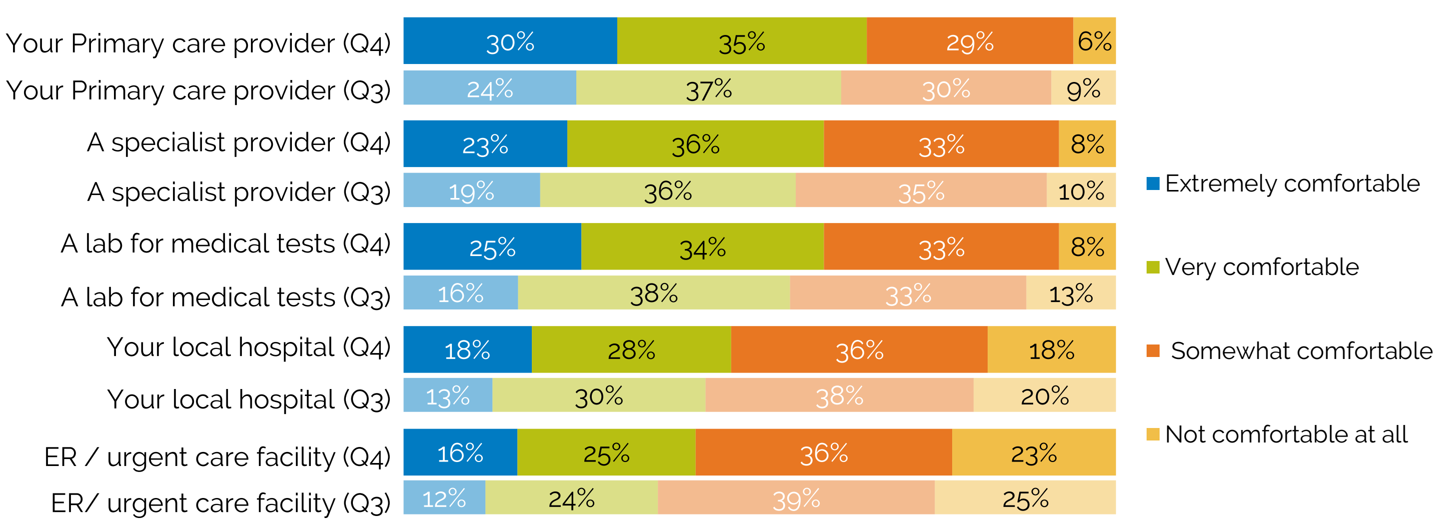
Consumers continue to state that their perspectives of government actors became more negative as a result of COVID-19. The most negative perceptions are held for federal government agencies like CMS and CDC, followed by state health leaders and local health leaders. Of note, there is a statistically significant decrease (-5%) from last quarter in negative perceptions towards state health leaders. Negative perceptions towards health insurers, hospitals and primary care providers remain comparatively low and stable from last quarter.

How has COVID-19 changed your perspective of the following healthcare actors in America?

% that report 'Made it much worse' or 'Made it worse'



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



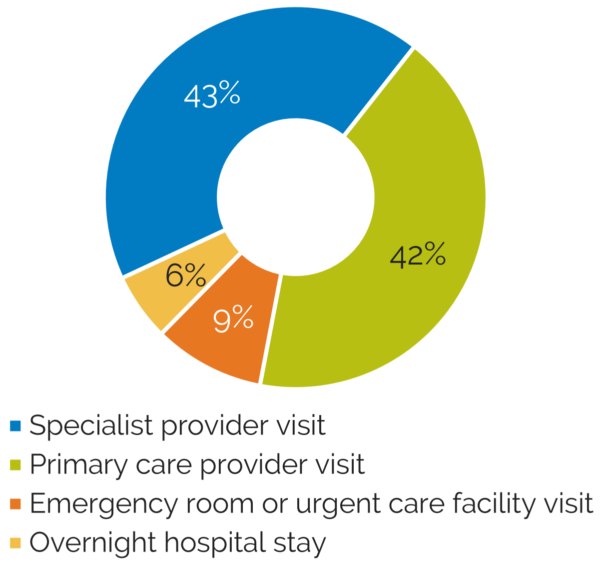
AT-HOME & FOLLOW-UP CARE

THE MAJORITY OF CONSUMERS DESCRIBED THEIR EXPERIENCES WITH FOLLOW-UP CARE AFTER A VISIT TO A PRIMARY CARE PROVIDER OR SPECIALIST PROVIDER

Consumers who recently had a visit that required further follow-up at home were asked additional questions about their experiences.

Consumers were asked to think about their most recent healthcare visit when describing their experience with the follow-up care they received. Most consumers had recently visited either a specialist provider (43%) or a primary care provider (42%). Only 9% of consumers indicated that their most recent visit was to an emergency room (ER) or urgent care facility, and only 6% had most recently had an overnight hospital stay.

Which of your healthcare visits was your most recent?

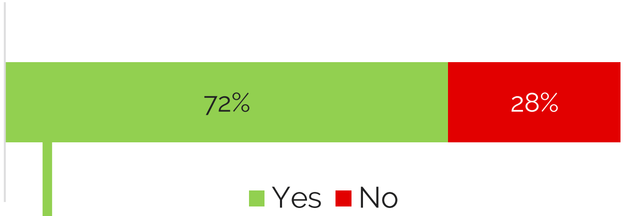


MOST CONSUMERS RECEIVED FOLLOW-UP INSTRUCTIONS EXPLAINED BY A PROVIDER

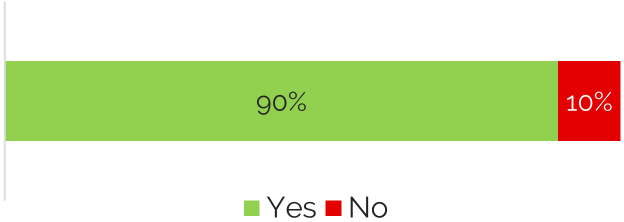
A majority of consumers (72%) indicated that they received written instructions telling them what to do after their visit. Consumers whose most recent visit was to an emergency room/urgent care center were the most likely to receive written instructions (91%) compared to consumers in other care settings (range of 68% to 73%).

Additionally, of those who received written instructions, 90% indicated that a nurse or doctor went over the instructions with them. These results were similar across care settings (range of 85% to 94%).

At the end of your visit, did you receive written instructions telling you what you should do afterwards regarding a treatment?

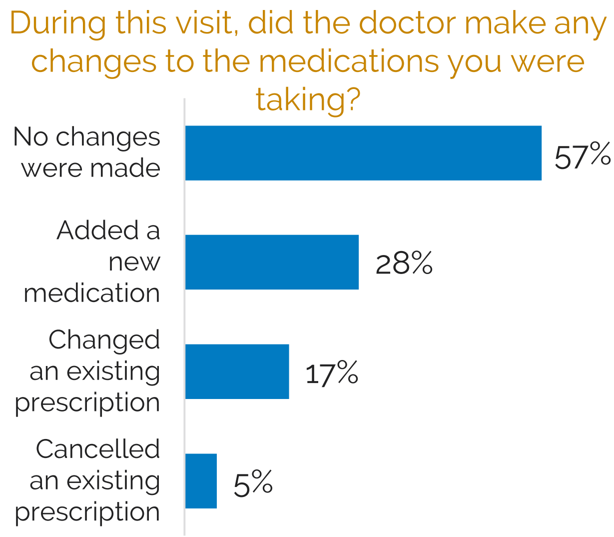


Did a nurse or doctor go over these instructions with you?



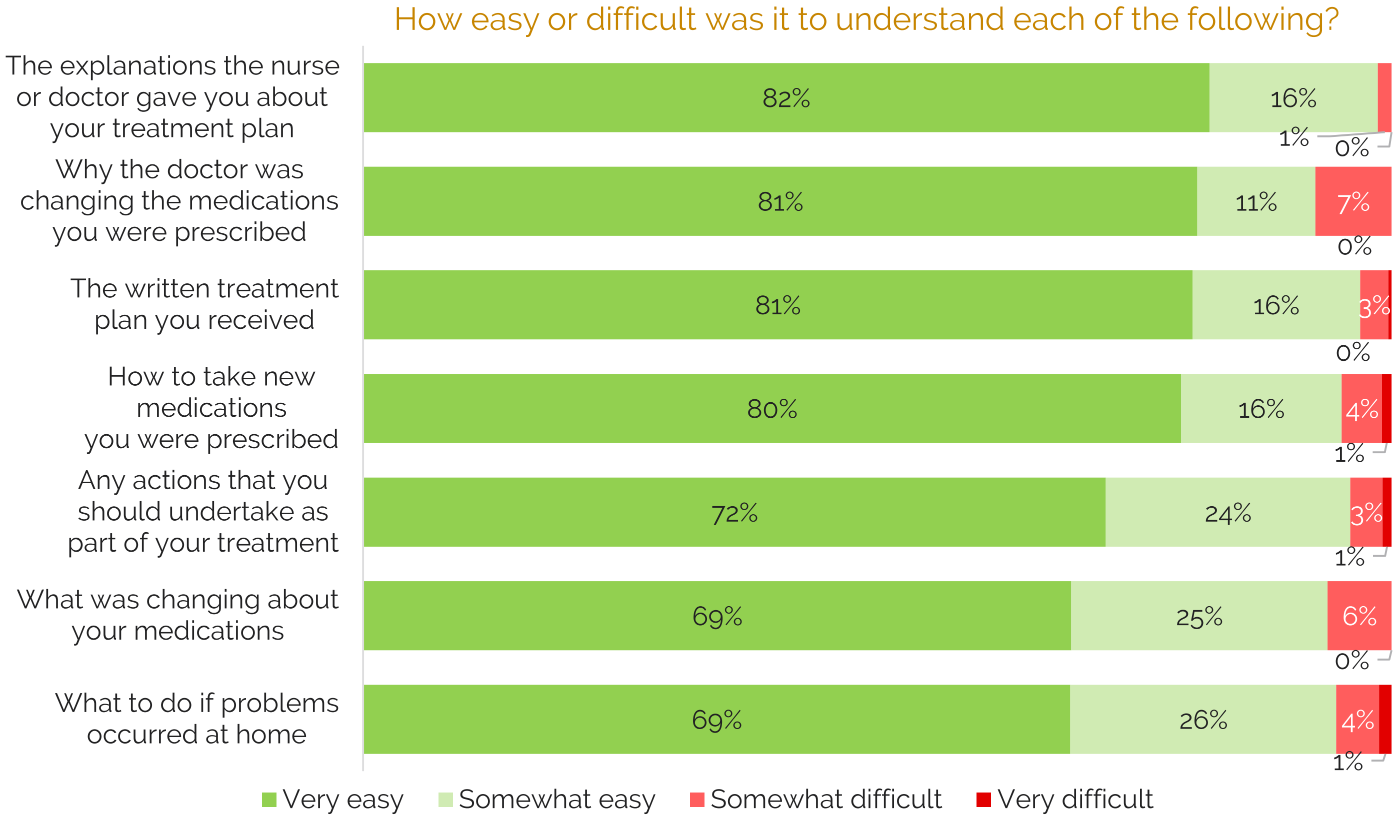
CONSUMERS FOUND IT EASY TO UNDERSTAND INFORMATION FROM THEIR PROVIDER

When asked about medication changes during their visit, a majority of consumers said their doctor did not make any changes to the medications they were taking (57%). Over a quarter of consumers said their doctor added a new medication for them to take (28%), while only a small number of consumers said their doctor changed (17%) or cancelled (5%) one of their existing prescriptions.



Overall, consumers found it "very easy" or "somewhat easy" to understand various information from their providers. Consumers were most likely to say it was "very easy" to understand explanations of their treatment plan (82%), why their medications were changing (81%), their written treatment plan (81%) and how to take new medications (80%).

However, consumers were less likely to say it was "very easy" to understand what to do if problems occurred at home (69%), what was changing about their medications (69%), and what actions they should take as part of their treatment (72%). Very few consumers said it was "somewhat" or "very difficult" to understand any of these factors (range of 1% to 7%).



CONSUMERS FOUND IT EASY TO FOLLOW INSTRUCTIONS AFTER THEIR VISIT

Almost all consumers (96%) found it "very easy" or "somewhat easy" to follow the instructions they received from the doctor or nurse explaining what they should do after their visit. However, consumers whose most recent visit was an overnight hospital stay were less likely to say it was "very easy" to follow the instructions after their visit (40%) compared to consumers in other care settings (range of 74% to 77%).

In an open-ended follow-up question, some consumers stated that it would be easier to follow the instructions if their doctor or nurse would listen to them, spend enough time with them, and write down the instructions.

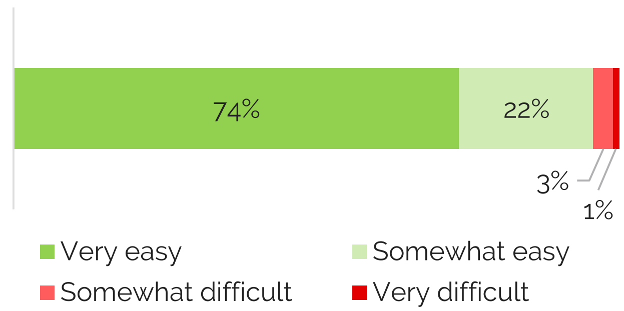
MOST CONSUMERS DID NOT RECEIVE A FOLLOW-UP CALL

Two-thirds of consumers (64%) did not receive a follow-up call after their visit. Consumers who visited their primary care provider were the least likely to have received a follow-up call (20%), while consumers who had an overnight hospital stay were the most likely to have received a follow-up call (56%).

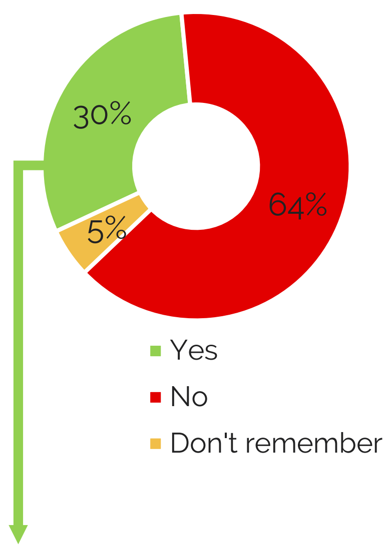
THE FOLLOW-UP CALL MADE IT EASIER FOR SOME CONSUMERS TO UNDERSTAND INSTRUCTIONS

Of the consumers who received a follow-up call after their visit, 40% said that the call made it easier to understand any instructions they were given about their follow-up care. However, most consumers said they already understood the instructions they were given (54%).

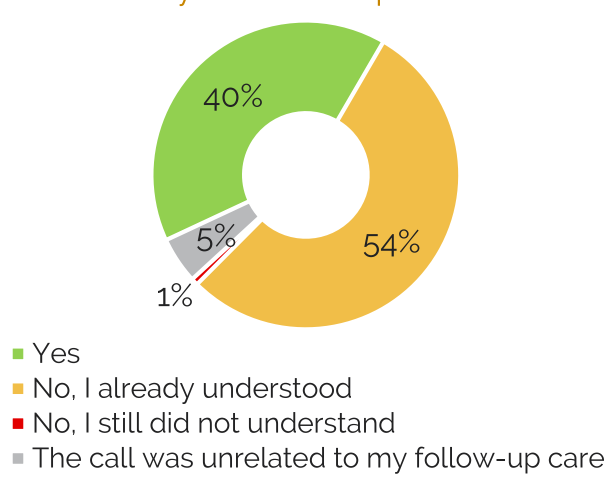
How easy did it end up being to follow any instructions you received from the doctor or nurse regarding what you should do after your visit?



Did someone call to follow-up about your care after your visit?



Did the call make it easier to understand any instructions you were given about your follow-up care?

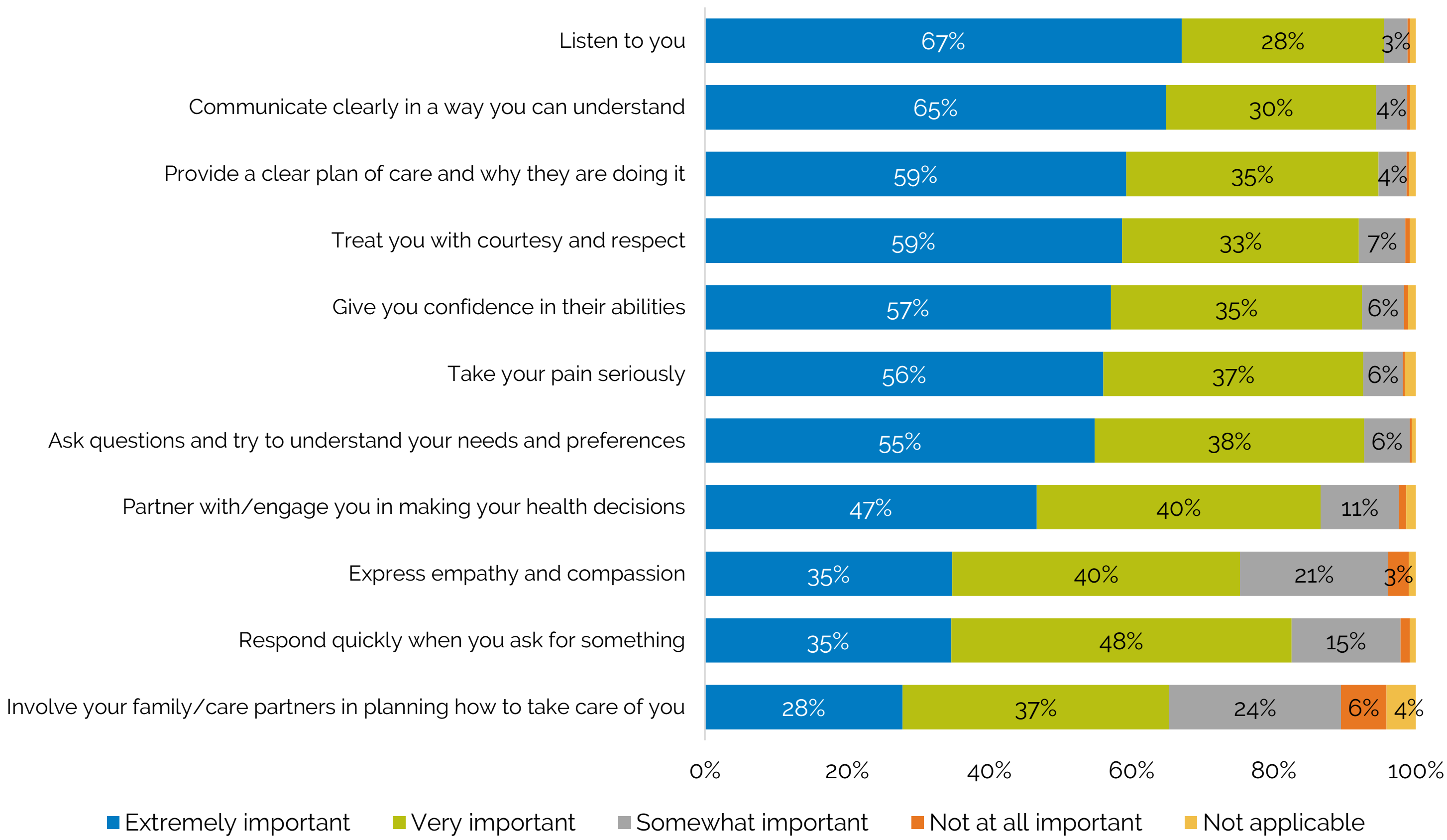


CONSUMERS WANT PROVIDERS THAT LISTEN, COMMUNICATE CLEARLY AND HAVE A CLEAR PLAN OF CARE

In continuing an inquiry first conducted by The Beryl Institute in 2018, consumers were asked about what is important for them to see from providers when it comes to having a good patient experience. The top responses that consumers cited as "Extremely important" included being listened to, having the provider communicate clearly in a way they can understand, and knowing that there is a clear plan for their care and the reasoning behind that plan.

The least important items to consumers (in terms of % that say it is "Extremely important") include expression of empathy and compassion, responding quickly when asking for something and involving their family/care partners in the care plan. These responses might reflect that patients trust their providers to develop and execute a plan that is ideal for them, particularly among those who find it less important to engage with their family and friends. Nonetheless, the majority of consumers appear to be in agreement that all the items asked about are "Extremely" or "Very" important to see from their providers.

When you think about having a good patient/family experience, how important is it to you that the people providing your care do each of the following?

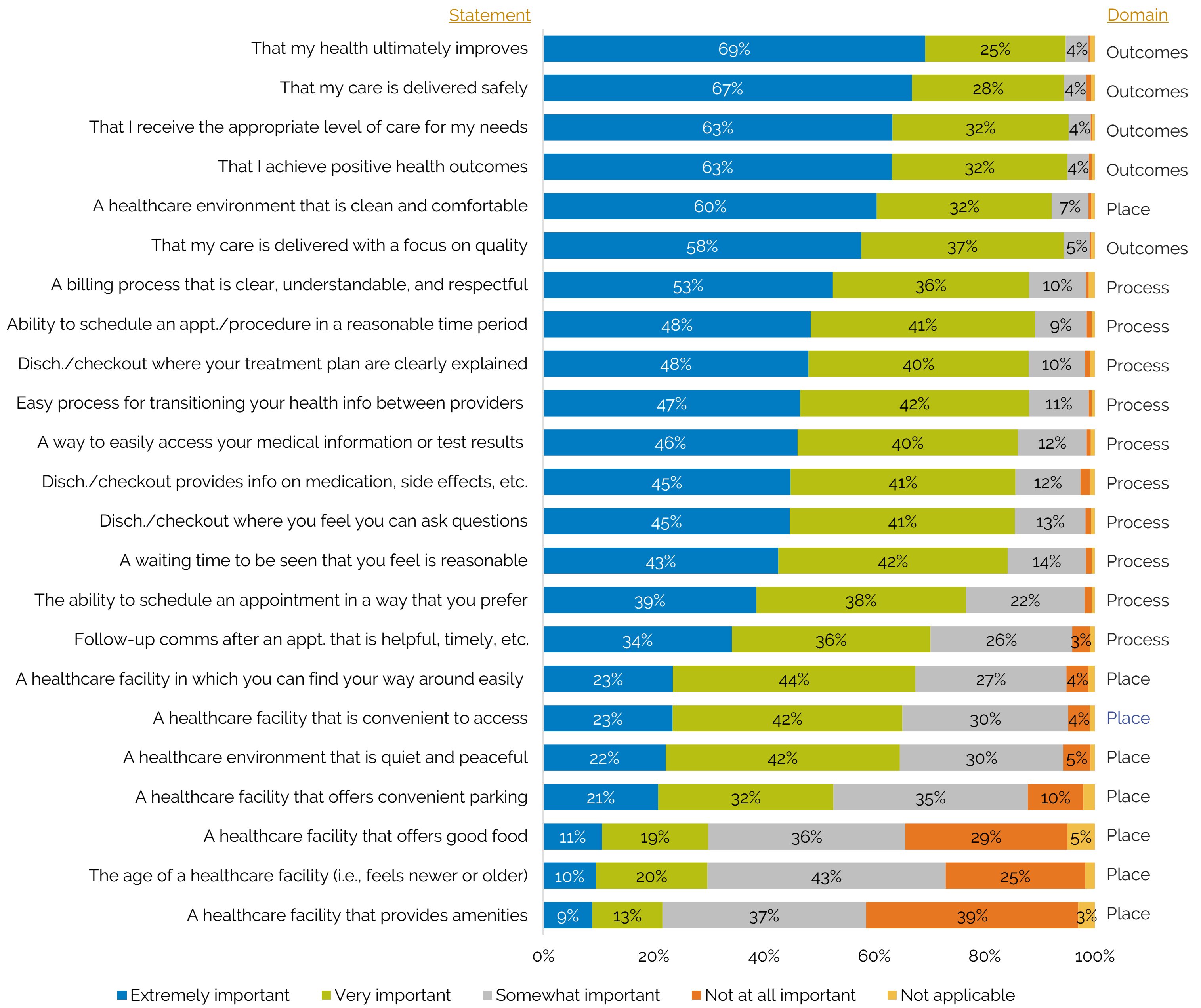


Sections in the graph without data labels represent values of less than 2%

OUTCOMES CONSISTENTLY EMERGE AS THE MOST IMPORTANT ISSUES TO CONSUMERS WHEN THINKING ABOUT HAVING A GOOD PATIENT EXPERIENCE

Consumers were asked about what is important for them when it comes to having a good patient experience. They were presented with statements organized around the domains of Process, Place, and Outcomes. When organizing consumer responses by the percent that reported the items as "Extremely important", a hierarchy of importance emerges that places Outcomes-related items at the top, followed by Process and Place. Notably, the item "A healthcare environment that is clear and comfortable" emerges as a factor just as important as those related to Outcomes.

When you think about having a good patient/family experience, how important are each of the following to YOU?



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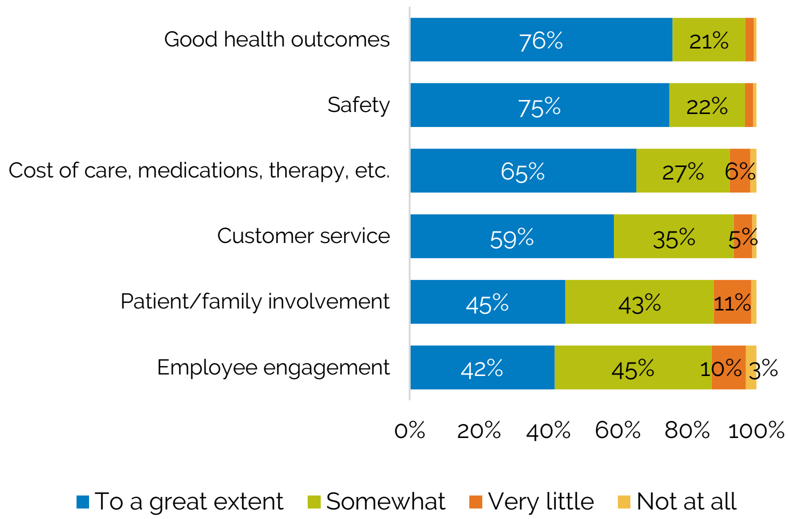
CONSUMERS BELIEVE THAT PATIENT EXPERIENCE INCLUDES GOOD HEALTH OUTCOMES AND SAFETY "TO A GREAT EXTENT"

Consumers were asked about the extent certain elements were included under the domain of patient experience. The majority of consumers agree that all items asked about were a part of patient experience "To a great extent" or "Somewhat". Consumers felt more strongly that good health outcomes and safety were the items that patient experience should include, with 75% to 76% of consumers saying it is included "To a great extent".

To what extent do you think/believe patient experience includes each of the following:



Sections in the graph without data labels represent values of less than 2%

THE QUALITY OF INTERPERSONAL COMMUNICATIONS APPEARS TO DIFFERENTIATE GOOD AND BAD CARE EXPERIENCES

Consumers were asked about words or phrases that they think about when trying to describe both a positive care experience and a negative care experience. The words and phrases that emerged from the responses suggest that interpersonal communications between care teams and the consumer are what drives whether an experience is good or bad. Some of the most common phrases that emerged when thinking of positive experiences include caring, friendly, comforting, compassionate, attentive and clear. In contrast, phrases associated with negative experiences include dismissive, rude, frustrating, careless and rushed.

What words or phrases would you use to describe a positive care experience?

What words or phrases would you use to describe a negative care experience?

IMPACT OF PATIENT EXPERIENCE

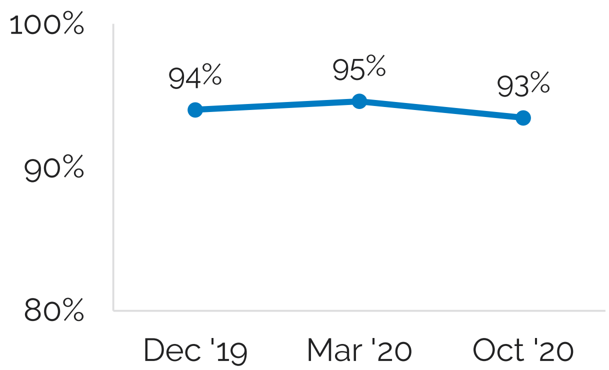
PATIENT EXPERIENCE CONTINUES TO PLAY AN IMPORTANT ROLE IN CONSUMER HEALTHCARE DECISIONS

The vast majority (93%) 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.

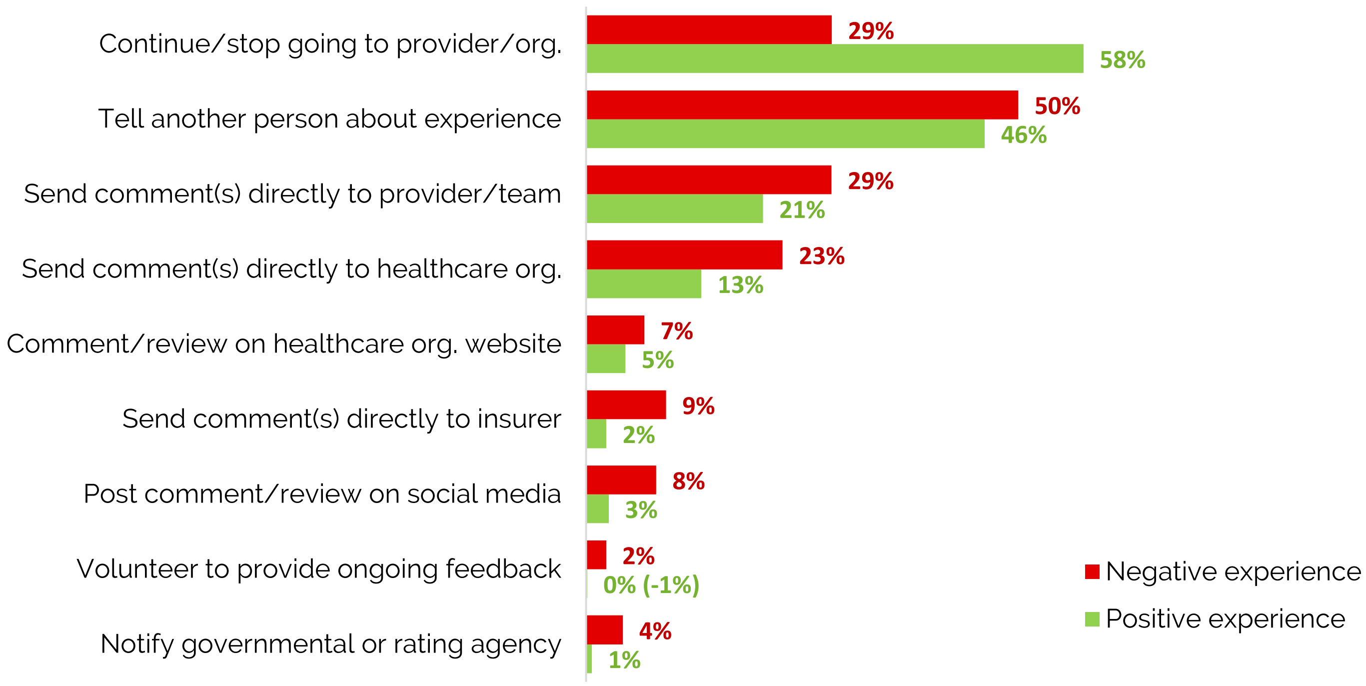
How significant is patient experience to your decisions about your healthcare or your family's healthcare?

% 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 Sep '20 and Mar '20 and 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 significant new consumer insights for the industry:

- Consumers appear to be re-engaging with healthcare, as visits to the primary care provider (+12%), visits to the labs for medical tests (+10%) and stays at the hospital (+2%) are significantly higher compared to the previous quarter.
- Consumers remain positive about overall healthcare quality (55%) and their own care experiences (74%). Although non-significant, there appears to be a slight decrease in the number of people positive about overall healthcare quality from last quarter.
- While costs remain among the most important healthcare issues for consumers, reducing the threat of infectious diseases (-3%) is a less important issue to consumers compared to the previous quarter.
- Consumers continue to say that patient experience is either "very important" or "extremely important" (96%).
- Consumers continue to report that having open access to their medical records (67%) and partnering with their healthcare provider on decisions related to their plan of care (54%) reflect meaningful participation in care experiences.
- Consumers appear slightly more comfortable overall about seeking healthcare services from primary care providers, specialty providers, hospitals, labs, and emergency rooms/urgent care centers.
- Consumers maintain their more negative view of government leaders due to COVID-19. In contrast, consumer views remained relatively neutral for primary care providers and hospitals.
- A majority of consumers (72%) indicated that they received written instructions telling them what to do after their visit. Consumers who visited an emergency room/urgent care center were more likely to receive written instructions (91%) compared to consumers in other care settings (range of 68% to 73%).
- Consumers that needed follow-up care were less likely to say it was "very easy" to understand what to do if problems occurred at home (69%), what was changing about their medications (69%), and what actions they should take as part of their treatment (72%).
- Consumers who visited their primary care provider were the least likely to have received a follow-up call (20%), while consumers who had an overnight hospital stay were the most likely to have received a follow-up call (56%).
- Consumers agree that it is "Extremely important" that providers listen (67%), communicate clearly (65%) and have a clear plan of care (59%).
- Factors related to Outcomes (as opposed to Process or Place) emerge as among the most important to consumers when it comes to having a good patient experience.
- Interpersonal communications seem to differentiate what it means for consumers to have either a good care experience or a bad care experience.
- Patient experience remains "Extremely" or "Very" significant to consumers when making decisions about their own or their family's healthcare.

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