

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

A NEW WAY TO TRACK CONSUMER PERSPECTIVES ON PATIENT EXPERIENCE

The Beryl Institute – Ipsos PX Pulse represents a first-of-its-kind effort to elevate understanding of the current perspectives on patient experience in U.S. healthcare.

This effort regularly captures healthcare consumer perspectives of patient experience in the United States, determines the practices and processes that have the greatest impact and influence on healthcare consumers, and tracks how the market sees patient experience evolving over time.

NEW INSIGHTS DELIVERED QUARTERLY

The survey asks five core questions that are used to trend consumer perspectives on patient experience and healthcare overall. In addition, each quarterly report features a deep dive into consumer experiences within specific health settings and dimensions of care.

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

PX PULSE ROADMAP				
Core Questions Asked Each Quarter				
<ol style="list-style-type: none"> Thinking about the healthcare system in America as a whole, overall how would you rate the quality of healthcare in this country? From the following list, which healthcare issue is most important to you? Thinking about how you have experienced healthcare in the past year, how would you rate your overall experience? Overall, how important is it that you have a good patient experience? 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

HIGHLIGHTS FROM APRIL RELEASE

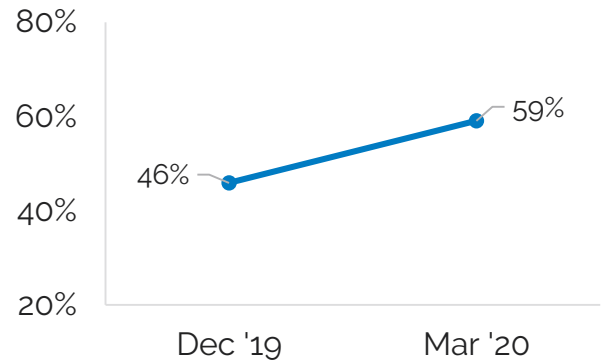
CORE FINDINGS

- 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 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.

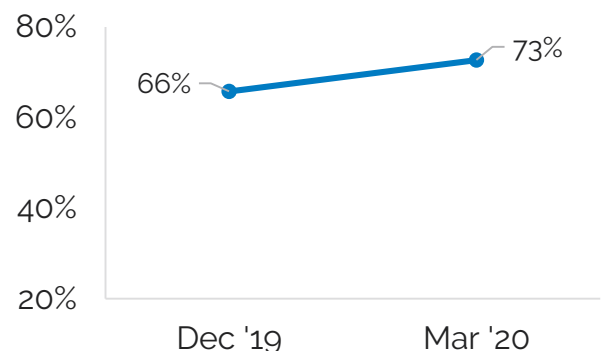
HOSPITAL EXPERIENCES & USE

- 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%).

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

TELEHEALTH

- 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.

IMPACT OF PATIENT EXPERIENCE

- Patient experience continues to play a significant factor (95%) in consumer healthcare decisions this quarter.