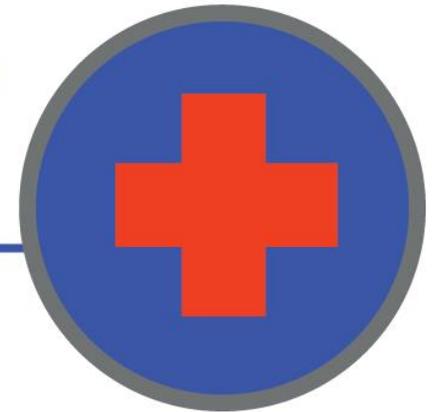


# Baltimore Healthcare *from the* Consumer Perspective

A webinar from

 **wba** RESEARCH

*(formerly WB&A Market Research)*



# Objectives and Methodology

## Topics explored:

- Opinions as to whether the quality of hospital care in Maryland has improved or declined over the past 5 years
- Concern about aspects of hospital care such as the availability of physicians/nurses, quality and safety of care, emergency rooms being overcrowded, etc.
- Awareness and opinions of specific hospitals in the Baltimore area
- Preference of area hospitals when it comes to certain conditions, treatment, etc.
- Advertising awareness for hospitals in the area

This research was fielded in the Baltimore Metropolitan Statistical Area (MSA) in April and May of 2013. The study was conducted among 600 adults, 400 via telephone interviews and 200 via a web survey, with a geographic sample representative of the market.

Additionally the Poll captures ten key demographic categories: age, gender, household income, education, marital status, race, county/area, presence of children in the household, types of Internet-connected devices owned, and employment status.



*Studies conducted by WBA are available on our website ([www.WBAresearch.com](http://www.WBAresearch.com))*

# Consumer Snapshot

# Profile

- Median age of 45
- 59% have a college degree
- 34% have children in household
- 60% married or partnered
- Median household income of \$70,000
- 53% female - 47% male

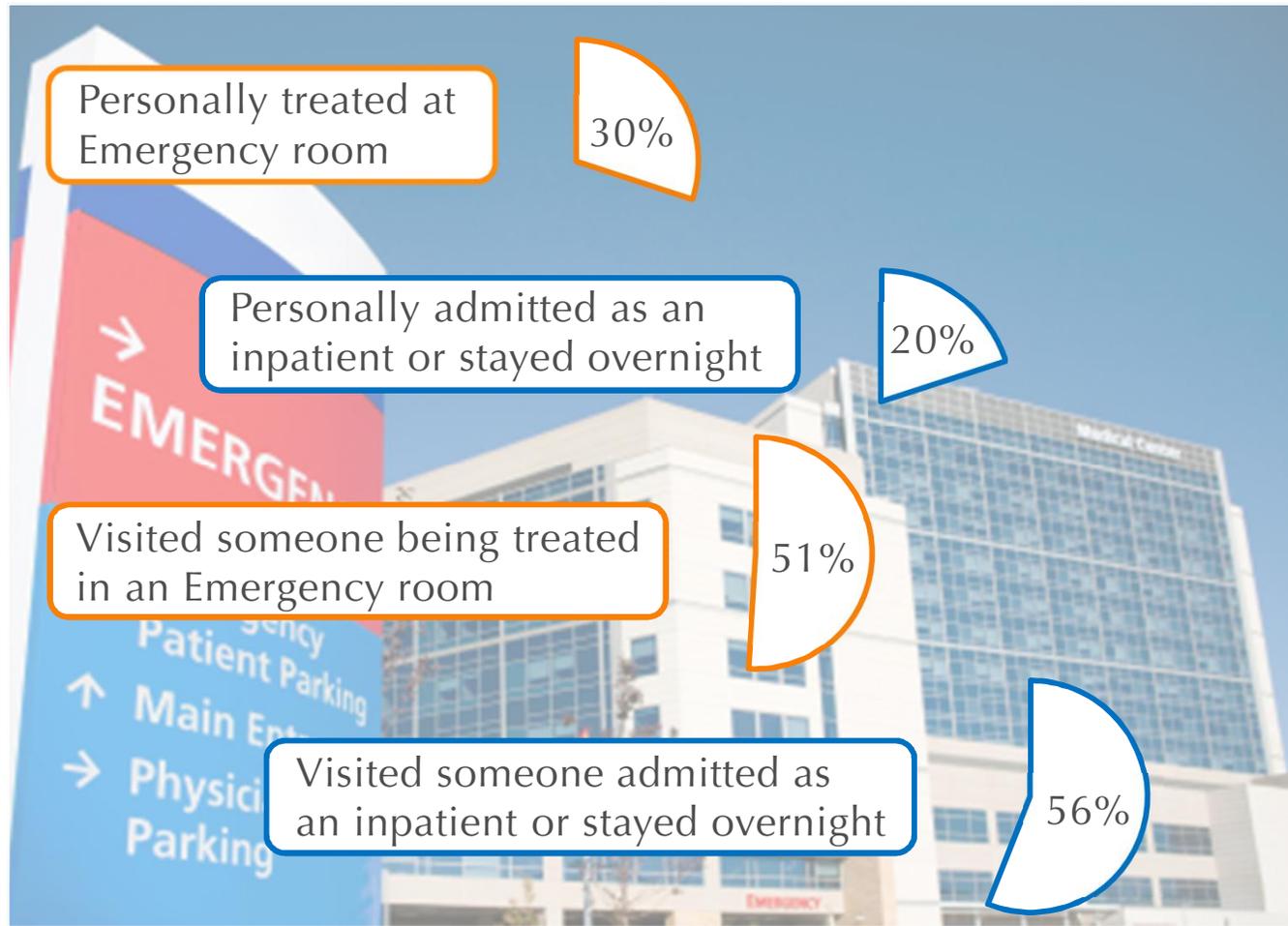


# Overall Health



# Hospital Experience

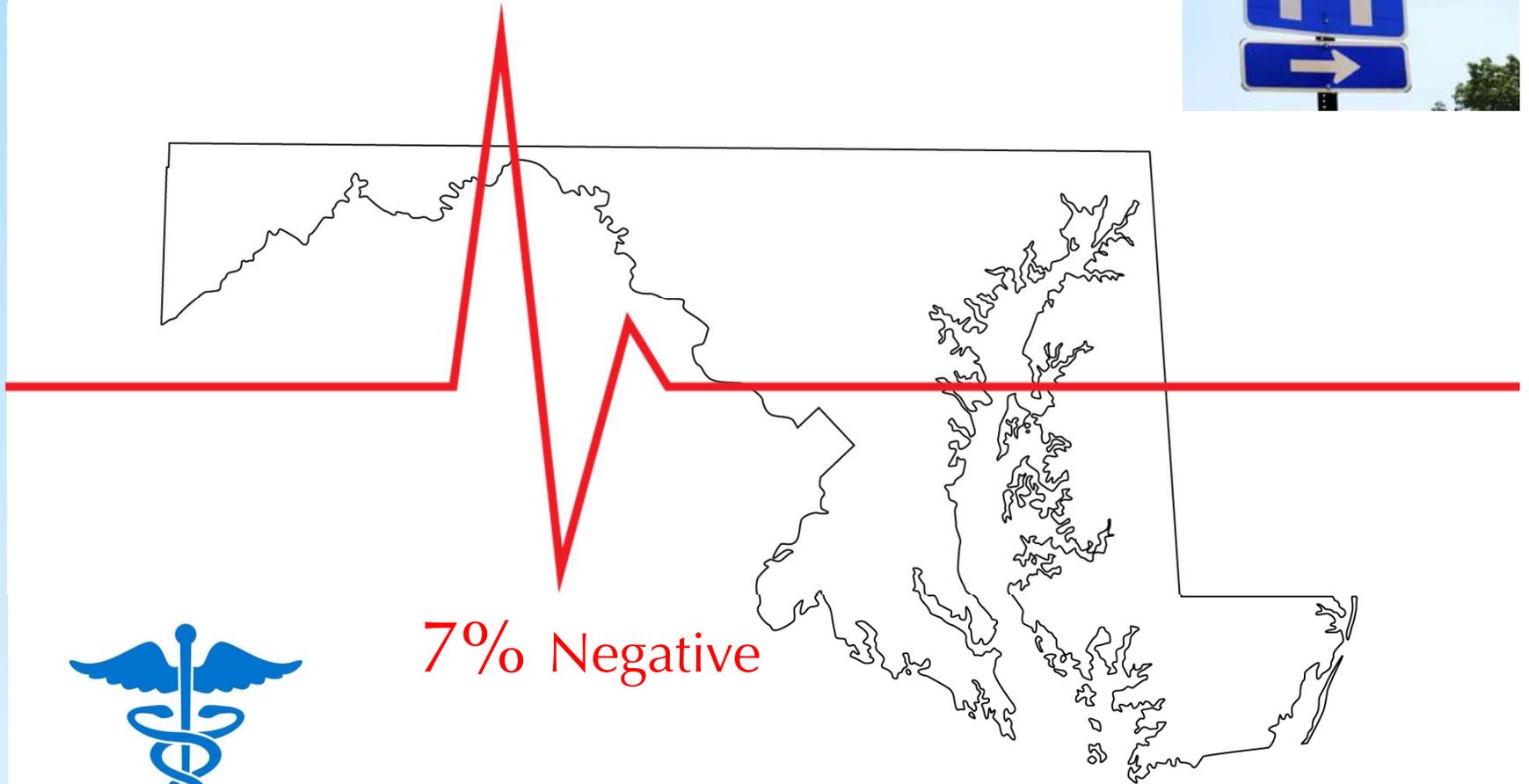
In the past year



# Maryland Hospitals Overall

# Overall Attitude Towards Maryland Hospitals

71% Positive



7% Negative



# Quality of Hospital Care in Past 5 Years

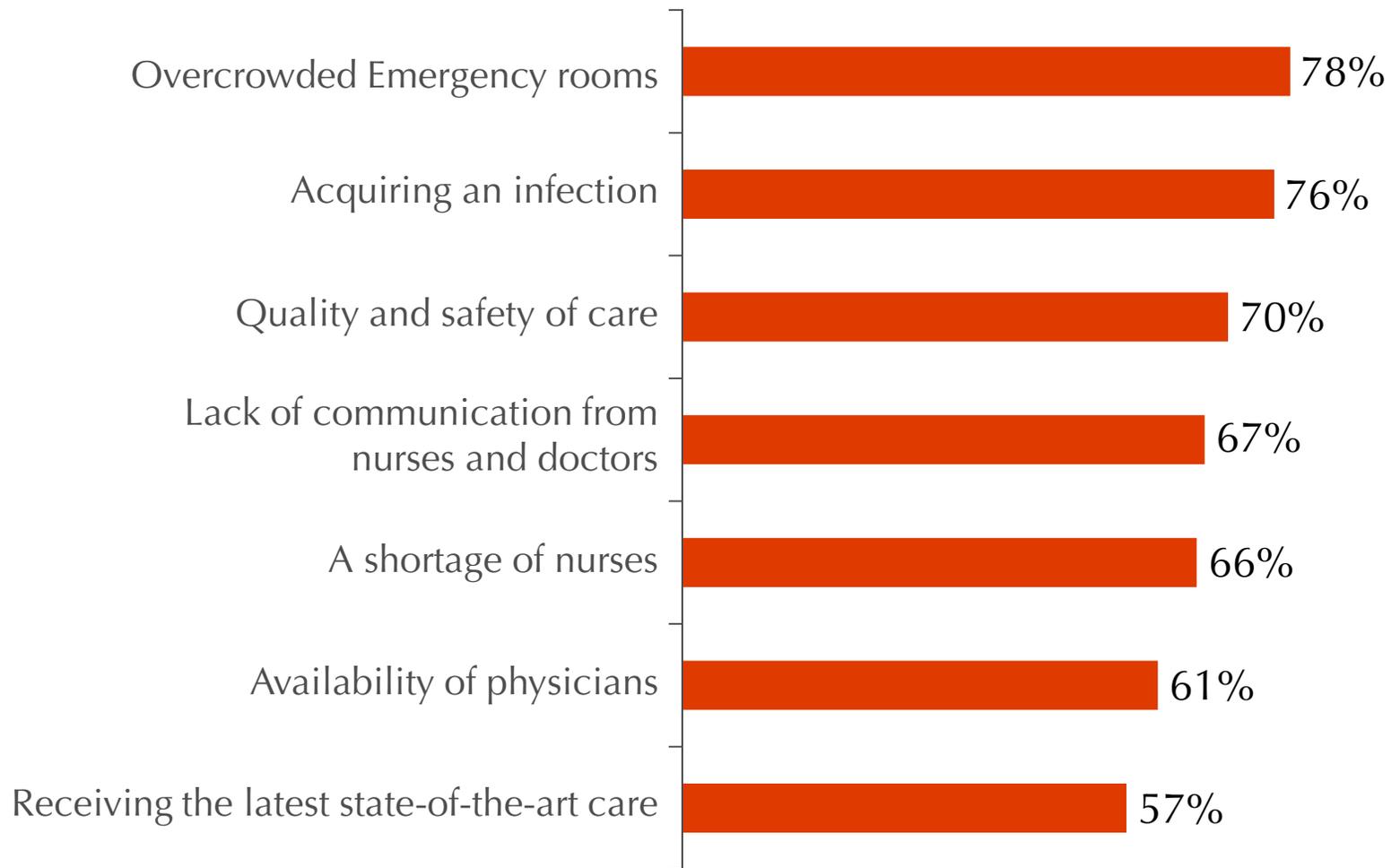
48% Improved



12% Declined

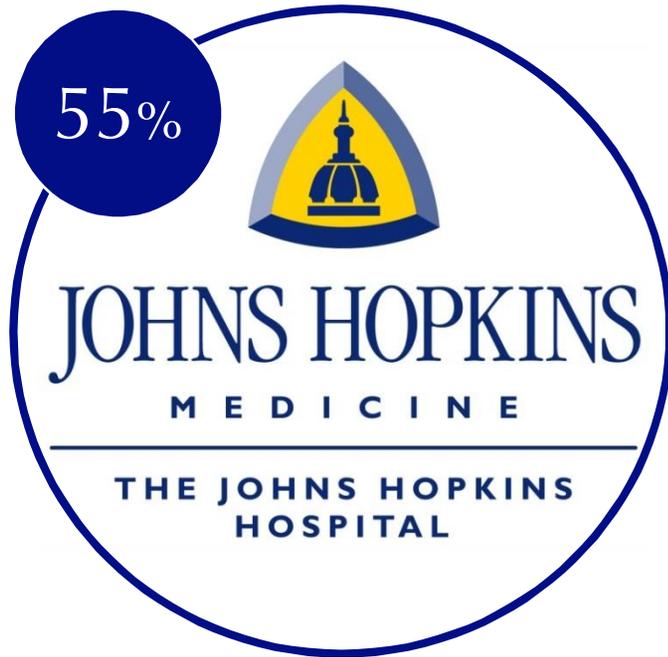


# Consumer Concerns



# Baltimore Area Hospitals

# Top-of-Mind Awareness of Area Hospitals



## Other top mentions:

-St. Joseph Medical Center	18%	-Anne Arundel Medical Center	14%
-Sinai Hospital	17%	-Franklin Square Medical Center	13%
-Mercy Medical Center	17%	-Union Memorial Hospital	13%
-St. Agnes Hospital	16%	-Baltimore Washington Medical Center	13%
		-Good Samaritan Hospital	11%



# Top-of-Mind Advertising Awareness

26%

*Mercy*  
MEDICAL CENTER

17%

JOHNS HOPKINS  
MEDICINE  
THE JOHNS HOPKINS  
HOSPITAL



UNIVERSITY of MARYLAND  
MEDICAL CENTER 20%

## Other top mentions:

-St. Joseph Medical Center	14%
-Medstar Harbor Hospital	10%
-GBMC	10%
-Sinai Hospital	10%

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# Total Advertising Awareness (unaided + aided)

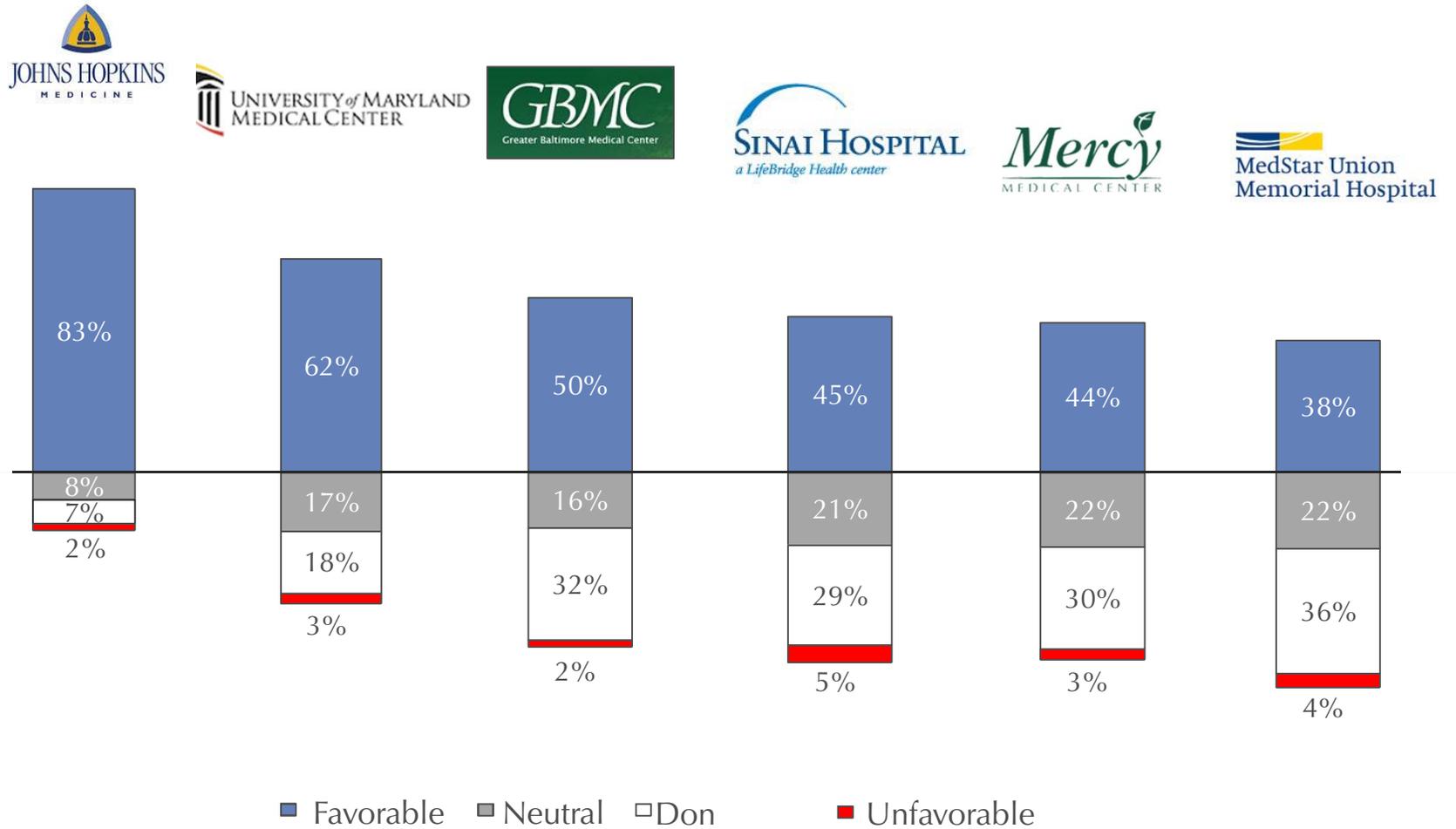


## Other top mentions:

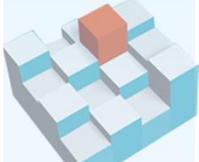
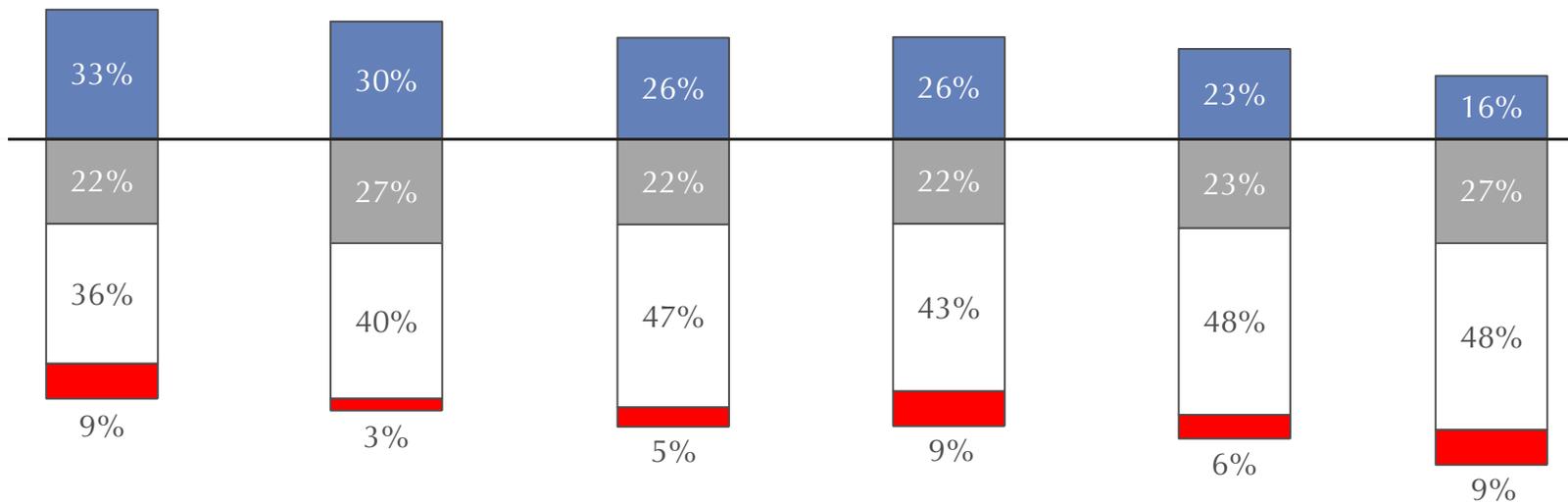
-St. Joseph Medical Center	35%
-Medstar Harbor Hospital	30%
-Union Memorial Hospital	28%
-GBMC	27%
-Sinai Hospital	25%



# Impressions of Area Hospitals



# Impressions of Area Hospitals



■ Favorable  
 ■ Neutral  
 □ Don't Know  
 ■ Unfavorable

# What Determines Where to Go for Care

insurance  
referral  
experiences  
word-of-mouth  
reputation  
physicians  
location



# Preferred Hospitals    General Care

Condition/Treatment	Johns Hopkins Hospital	GBMC	Anne Arundel Medical Center	University of MD Medical Center	Sinai Hospital
General surgery, such as hernia repair or other gastrointestinal procedures	14%	11%	10%	8%	8%
General medical care	11%	13%	11%	5%	7%
Outpatient or ambulatory surgery	14%	10%	12%	8%	7%



# Preferred Hospitals Pediatric Care

22%



JOHNS HOPKINS  
M E D I C I N E

THE JOHNS HOPKINS  
HOSPITAL

10%



Anne Arundel  
Medical Center

SINAI HOSPITAL  
*a LifeBridge Health center*

9%

GBMC  
Greater Baltimore Medical Center

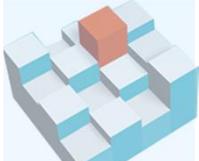
9%



UNIVERSITY of MARYLAND  
MEDICAL CENTER

6%

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# Preferred Hospitals    Obstetric Care

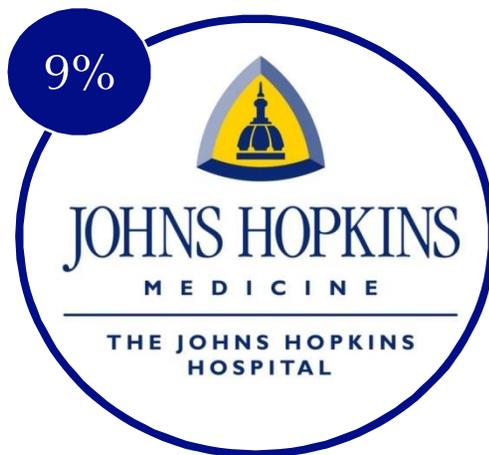
18%



12%



9%



8%



# Preferred Hospitals Specialized Care

Condition/Treatment	Johns Hopkins Hospital	GBMC	Anne Arundel Medical Center	University of MD Medical Center	Sinai Hospital	Union Memorial Hospital	St. Joseph Medical Center
Heart problem/Cardiac care	26%	5%	8%	10%	7%	8%	9%
Cancer treatment	34%	7%	7%	8%	5%	1%	3%
Diabetes treatment	14%	11%	9%	6%	7%	1%	3%
Treatment for a stroke	21%	10%	8%	8%	7%	4%	4%
Orthopedic surgery, hip replacement or knee replacement	18%	6%	8%	5%	6%	13%	3%
Vascular care, such as treatment for aneurysms, carotid artery disease or other vein problems	24%	9%	8%	9%	6%	4%	5%
Breast surgery or cancer surgery	30%	9%	7%	10%	4%	1%	3%
Spine or back surgery	23%	6%	7%	9%	5%	8%	3%



# Emergency Care

# What Determines Where to Go for Emergency?

experiences  
location  
insurance  
physicians  
reputation  
word-of-mouth

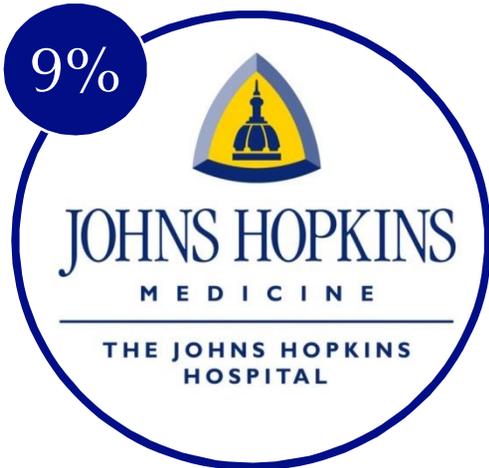


# Preferred Hospitals      Emergency Care

12%



11%



# Emergency Wait Time



# Health Care Reform

# Awareness of Health Care Reform

Health Care  
Reform?



# Familiarity with Elements of Health Care Reform

**% FAMILIAR with:**

**75%** Requirement for everyone to have health insurance

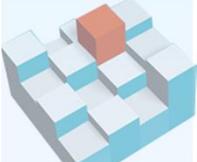
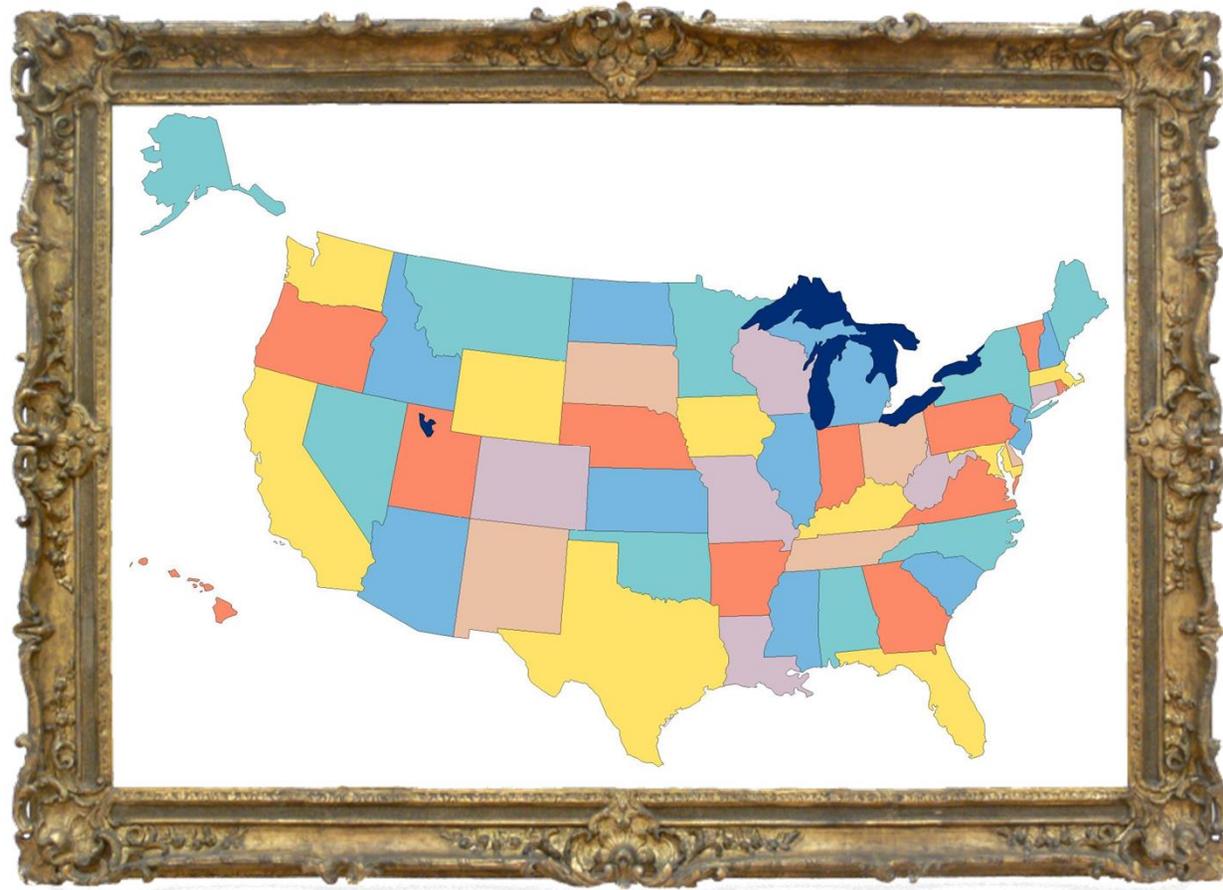
**50%** Penalties Assessed by the government for individuals and families that do not have health insurance

**44%** Subsidies Given by the government to assist lower and middle income households purchasing coverage through the Exchange

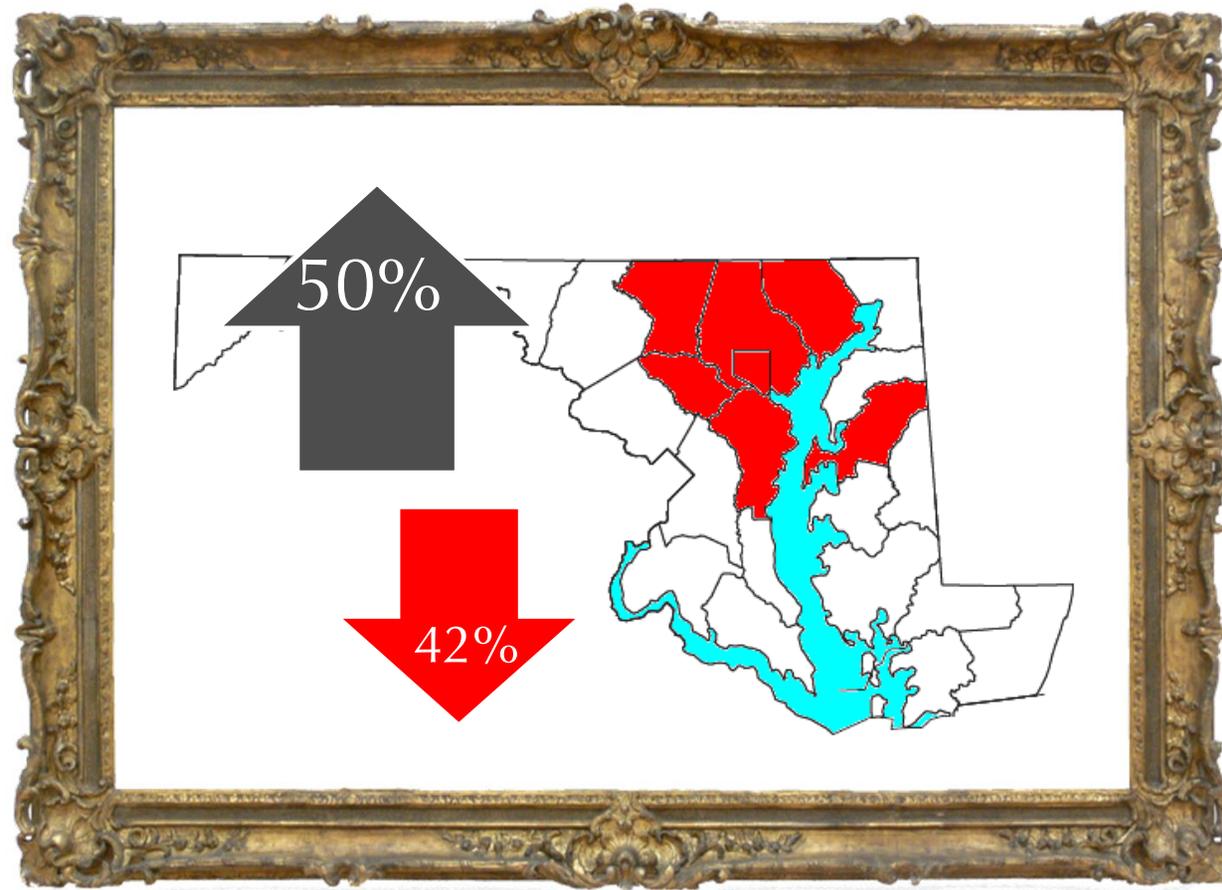
**40%** The Exchange An online marketplace where those who do not have coverage provided by their employer can purchase coverage for themselves and their families



# Impact of Health Care Reform



# Impact of Health Care Reform



# Impact of Health Care Reform

