



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

JUNE 2024

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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. We believe human experience is grounded in the experiences of patients & families, members of the healthcare workforce and the communities they serve. 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

This report represents the 15th release of The Beryl Institute – Ipsos PX Pulse as we continue to explore the core trends impacting healthcare and the human experience in the United States.

In this edition of PX Pulse, we continue to explore how people see both the quality of care they are receiving and the experience they are having in healthcare today. While ratings on these items remain consistent over the last two years, we find that people still have concerns about the overall quality of care in the United States (U.S.), while they believe the experience they have is better. For consumers in the U.S., experience has remained important for several reasons, with the reason continuing to be the importance of overall health and wellbeing.

This issue also reintroduces the core consumer questions that have been posed by the Institute since 2018 and shared in PX Pulse in 2022. The responses of what people see as important in their consideration of experience remain clear and consistent. People still seek care because their health and wellbeing are important to them and they expect to have appropriate and safe care, but what they want most from healthcare organizations is to be listened to, communicated to clearly, taken seriously, and provided clear plans of care to lead them forward. These reflections suggest that the importance of focusing on the relational nature of healthcare between patients and providers remains essential.

This issue also introduces a new inquiry into how people feel about and use artificial intelligence (AI) in general and for their healthcare needs. There is still a lot to be discovered about AI, and the wavering trust that people have in AI as a resource raises questions as to whether AI in healthcare is an opportunity, a concern, or potentially both.

This issue of PX Pulse continues to reinforce what is important to healthcare consumers as well as highlight the opportunities that healthcare organizations have in leading forward. The findings in this issue of PX Pulse reinforce an essential need, that if people seek to achieve safe, equitable, and quality outcomes in healthcare, we must commit to transforming the human experience. This requires a commitment to patients, family members and care partners, the healthcare workforce, and the communities that healthcare organizations are privileged to serve.

PX Pulse reminds us that in seeking to understand the perceptions of people and gathering evidence from the voices of consumers, we uncover paths to action that will lead us forward to a better day for healthcare. Our hope in this and every issue of PX Pulse you find inspiration for action to do just that.

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, 1018 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from March 14th through March 21st, 2024, 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.

Since the launch of PX Pulse in early 2020, we have presented findings in a pattern of shorter core inquiries and deeper-dive sets of questions in alternating quarters, this quarter we expanded our inquiry beyond the core questions with a follow-up inquiry on the impact of COVID-19 on consumer perspective as well as an exploration of perspectives on healthcare decision making, visitation policies and civility in healthcare today.

The core questions we have asked since the launch of PX Pulse include:

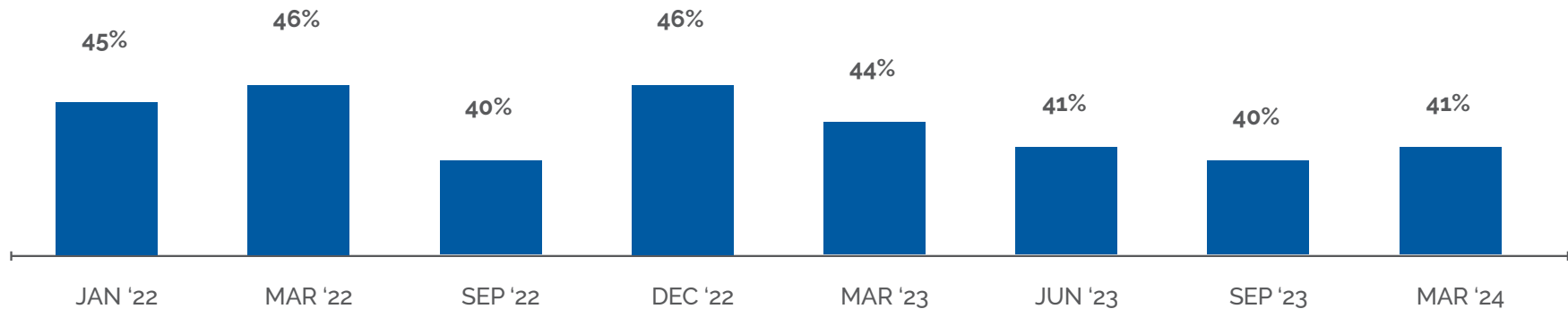
- 1 Thinking about the healthcare system in America as a whole, overall, how would you rate the quality of healthcare in this country?
- 2 From the following list, which healthcare issue is most important to you?
- 3 Thinking about how you have experienced healthcare in the past year, how would you rate 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 TRENDS

Consumers' perception of quality remains unchanged for the last three quarters.

The perception of the quality of the healthcare system in America has not changed significantly since our last inquiry (Figure 1). Down three percentage points compared to a year ago at this time, about 40% of people rate the quality of healthcare as "Very Good" or "Good."

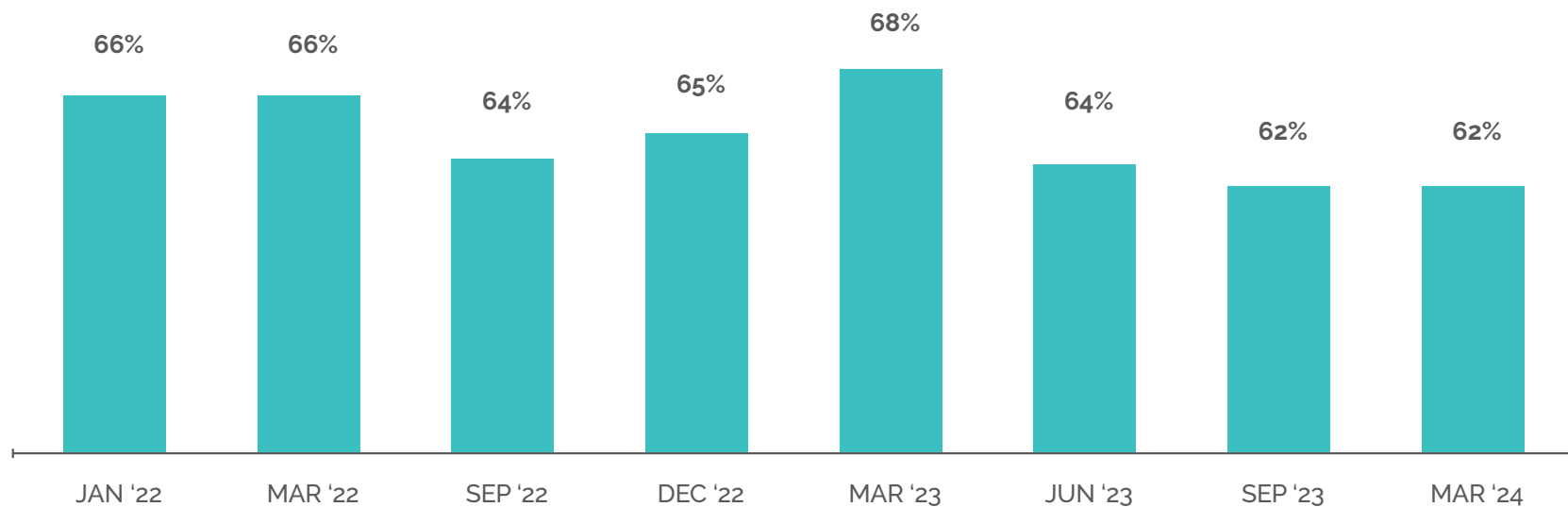
Figure 1. Quality of Healthcare in America (% "Very Good" + "Good")



Consumer perception of overall care experience remains unchanged as well.

Like their perception of quality of the healthcare system, people's perception of their overall experience with the healthcare system is unchanged this quarter at 62% (Figure 2). This is a drop of six percentage points from a year ago in March 2023, which may be reflective of the challenges healthcare is currently experiencing post-pandemic inclusive of staff shortages, financial struggles, and supply chain issues. It can only be expected that these pressures are reflected in the ways in which healthcare organizations have had to operate and, therefore, the way in which people experience care. The current steady trend for both quality and experience may indicate consumers have arrived at an acceptance of what the post-pandemic healthcare system looks like and are learning how to navigate this new era. The question this raises for healthcare organizations is whether we believe these results are good enough.

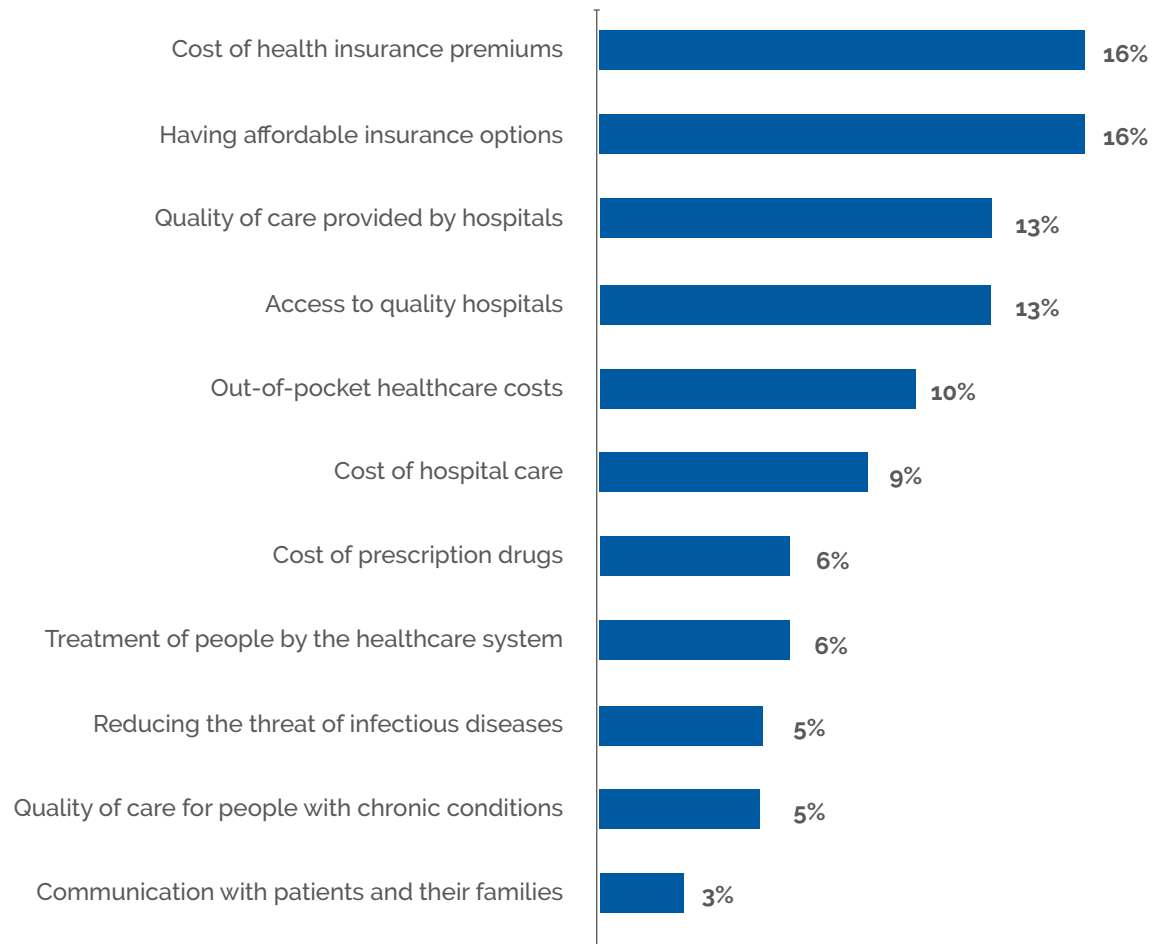
Figure 2. Overall Care Experience in the Past 12 Months (% "Very Good" + "Good")



While cost continues to be important to the U.S. consumer, so is quality and access.

When asked to rank healthcare issues by importance, people said cost of health insurance premiums remains the most important healthcare issue, followed by having affordable insurance options. In addition to the importance of costs, people also rated “Quality of care provided by hospitals” and “Access to quality hospitals” as important (Figure 3).

Figure 3. Which healthcare issue is most important to you? (Top 1)



Importance of a good experience slips slightly while people continue to reinforce that their health and wellbeing are important.

While the number of consumers who think having a good experience is important has dipped slightly since last quarter, 91% of people still think it is either extremely or very important (Figure 4.) The top three reasons why people felt this way include "My health and wellbeing are important to me," "I want to know my needs are taken seriously," and "I want/deserve to be treated with respect" (Figure 5).

Figure 4. Overall, how important is it that you have a good experience as a patient?
(% "Extremely important" or "Very important")

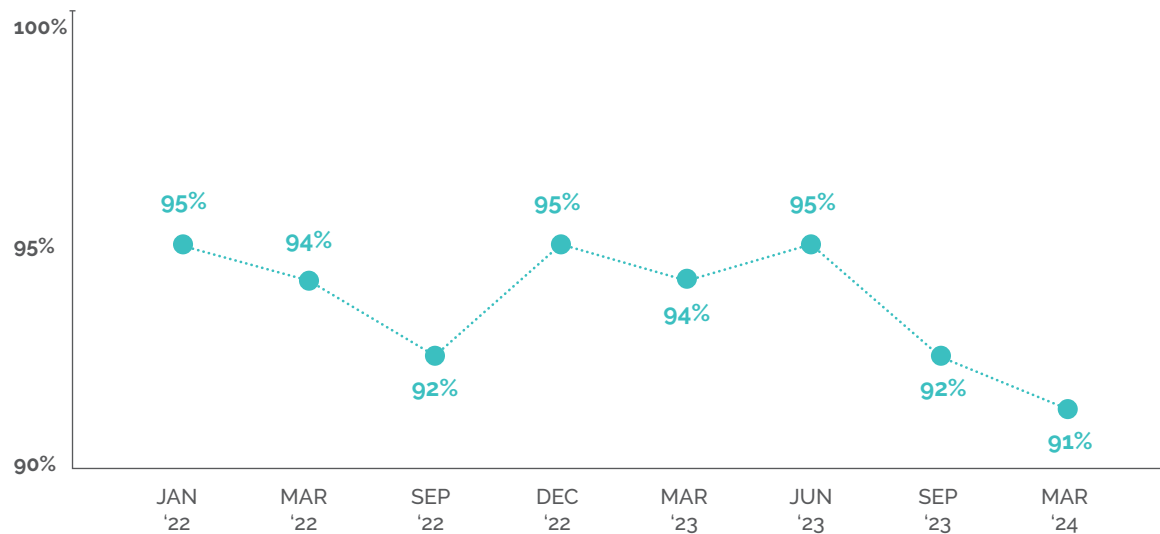


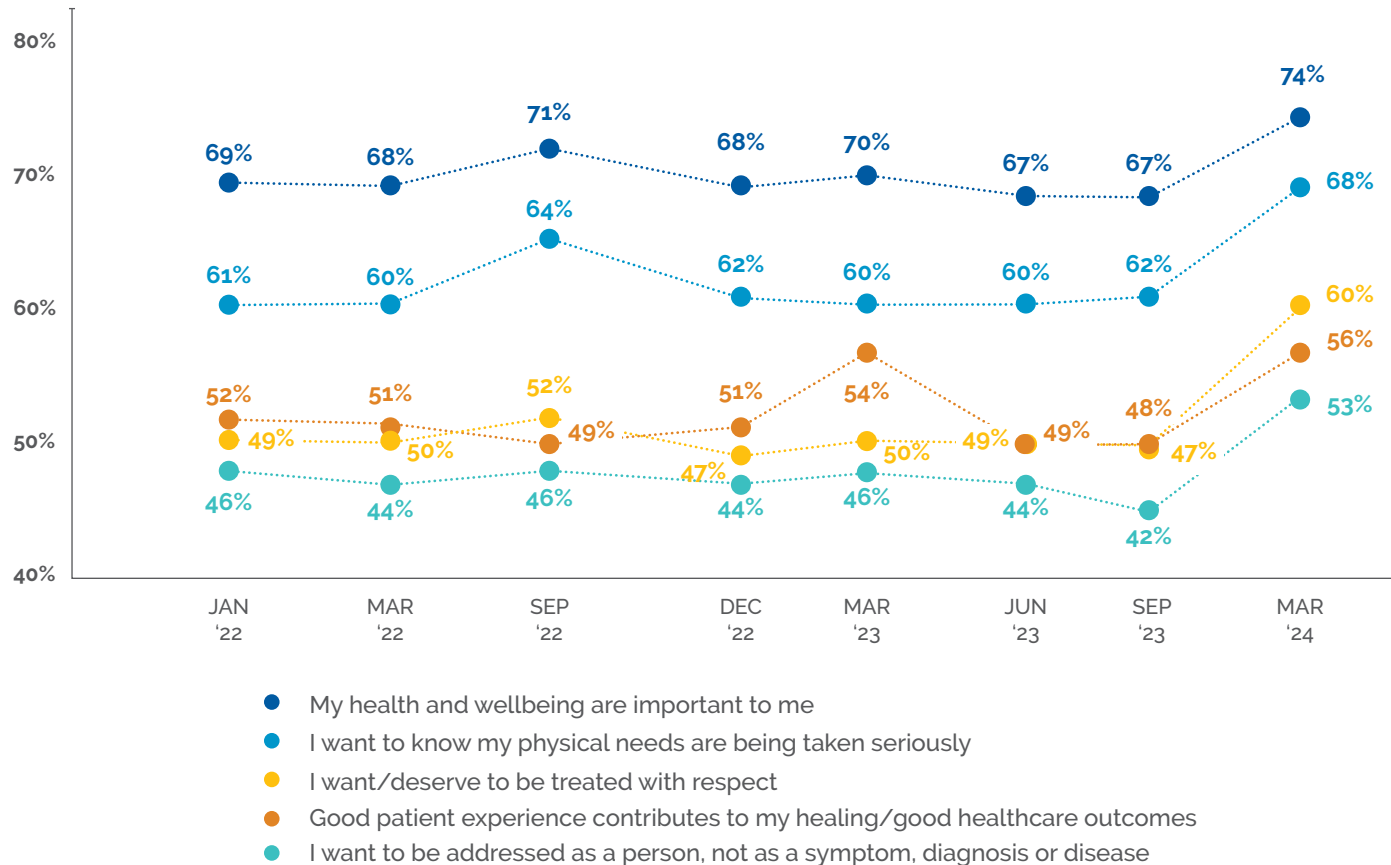
Figure 5. Why is having a good experience important to you?

- 74%** My health and wellbeing are important to me
- 68%** I want to know my physical needs are being taken seriously
- 60%** I want/deserve to be treated with respect
- 56%** Good patient experience contributes to my healing/good healthcare outcomes
- 53%** I want to be addressed as a person, not as a symptom, diagnosis or disease
- 42%** I spend my money on this
- 41%** My time matters
- 41%** It will influence how I make healthcare decisions in the future
- 24%** I see myself as a customer

Consumers place increased importance on health and wellbeing.

When asked why having a good experience is important to them, more people chose “My health and wellbeing are important to me” in this quarter than in previous quarters. In fact, 74% of people rated health and wellbeing as important, up 7 percentage points since last quarter and the highest rating for the last two years. Additionally, “I want/deserve to be treated with respect” saw a significant increase in importance this quarter over last quarter, rising 13 percentage points. This was in line with the jump of people noting “I want to be addressed as a person” rising 11 points since last September. This focus may reflect consumers taking a stronger position in their role as patients, wanting to be listened to and included in healthcare decisions. While not as significant a jump but still seeing a major increase in importance this quarter, “Good patient experience contributes to my healing/good healthcare outcomes” rose 8 points (Figure 6). The importance of healing and good outcomes may be related to increased consumer demand to be more involved in their healthcare decision making.

Figure 6. Why is having a good patient experience important to you?



CONSUMER PERSPECTIVES ON EXPERIENCE

What Matters for Healthcare Consumers – Priorities & Trends

This release of PX Pulse continues an inquiry by The Beryl Institute first released in 2018 as Consumer Perspectives on Patient Experience 2018. This data was again collected and presented in the second report, Consumer Perspectives on Patient Experience 2021, as part of data collected in the October 2020 PX Pulse. This section continues to look at some of those trends in advance of a broader global inquiry on these items again in 2024.

This portion of our survey asked, “When you think about having a good patient/family experience, how important are each of the following to you?” Responses were broken down into categories: People, Process, Place, and Care Delivery. These findings highlight the critical reality that a focus on human experience is where we must amplify our efforts in healthcare to ensure the best for the patients, families and care partners, the workforce who shows up every day to provide the best in care, and the communities in which our healthcare organizations operate.

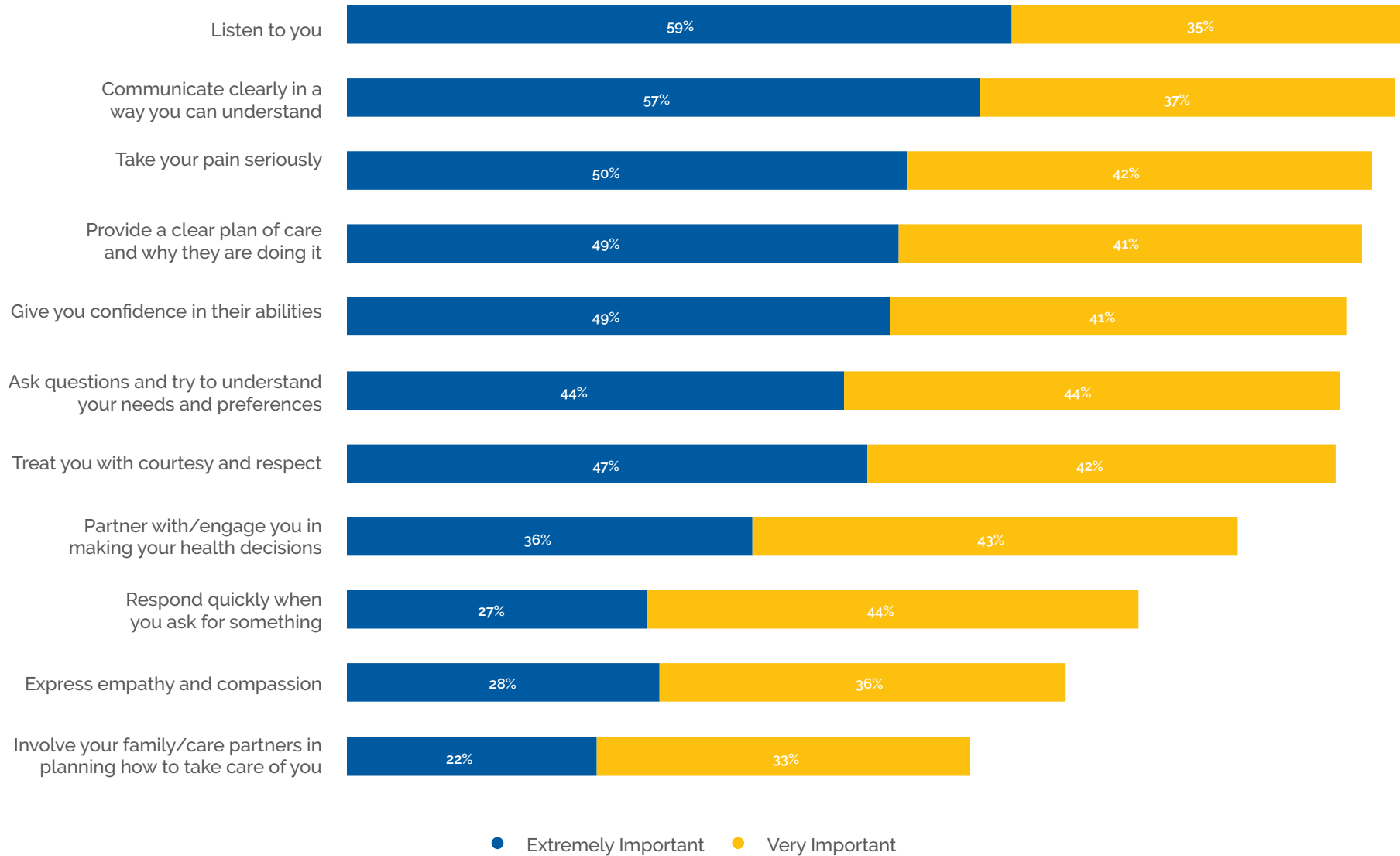
“People” impact on experience.

The items of importance in the “People” category are revealed in the Figure 7. Key highlights include:

- “Listen to you” and “Communicate clearly in a way you can understand” remain the top two items of importance. Consumers are consistently looking for effective communication at the heart of their healthcare experience.
- “Take your pain seriously” and “Provide a clear plan of care and why they are doing it” are the third and fourth items of importance.
- “Give you confidence in their abilities” was the fifth item of importance, which may reflect that healthcare consumers remain focused on wanting to have trust in their care providers.

The “People” items of highest importance highlight peoples’ desire to be heard and taken seriously as part of their care.

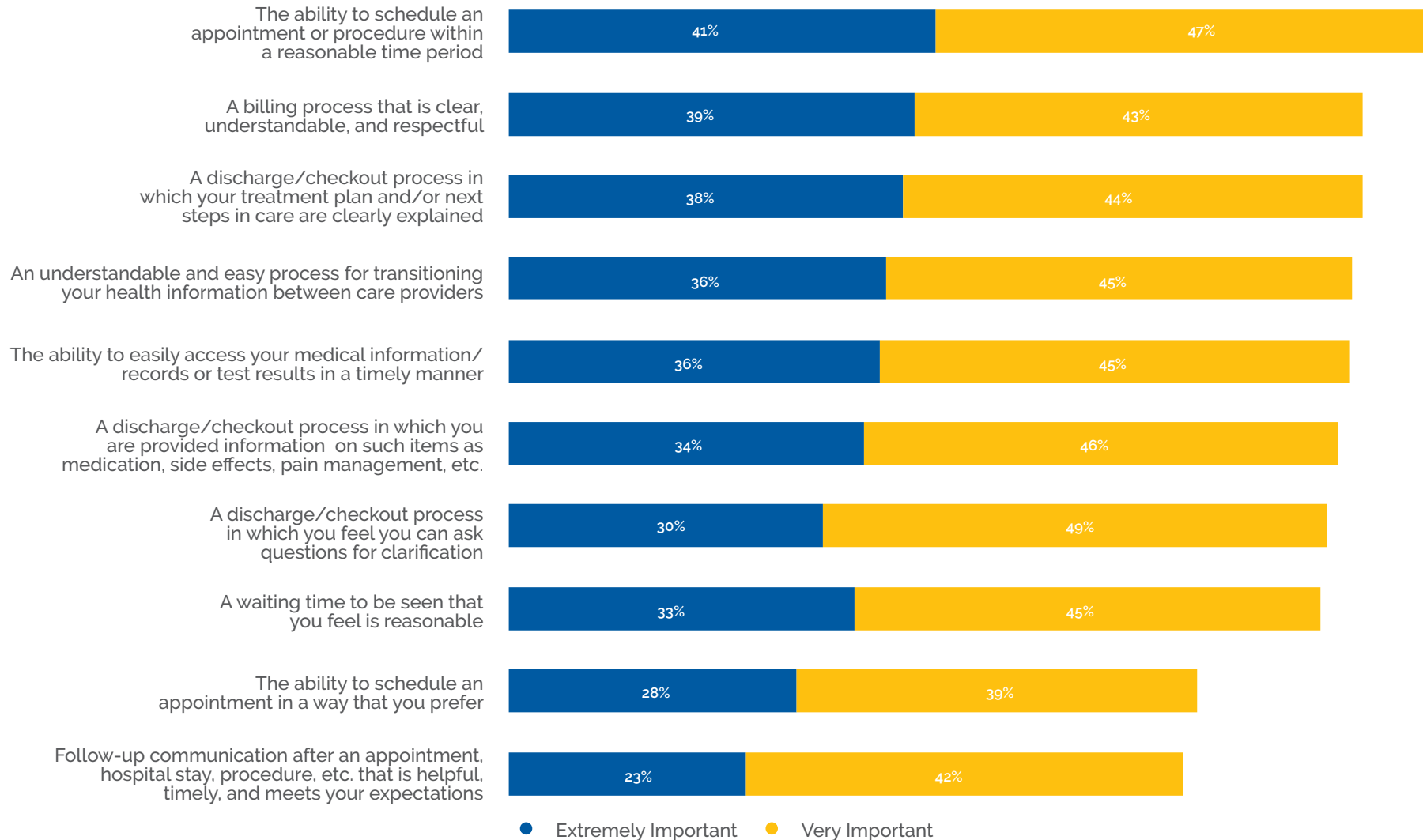
Figure 7. PEOPLE: When you think about having a good patient/family experience, how important is it to you that the people providing your care do each of the following? (% Extremely + % Very important)



“Process” impact on experience.

Responses for the “Process” category are shown in Figure 8. The top three responses reflect that scheduling, ease of billing, and receiving a clear treatment plan at discharge are the most important processes to a good experience.

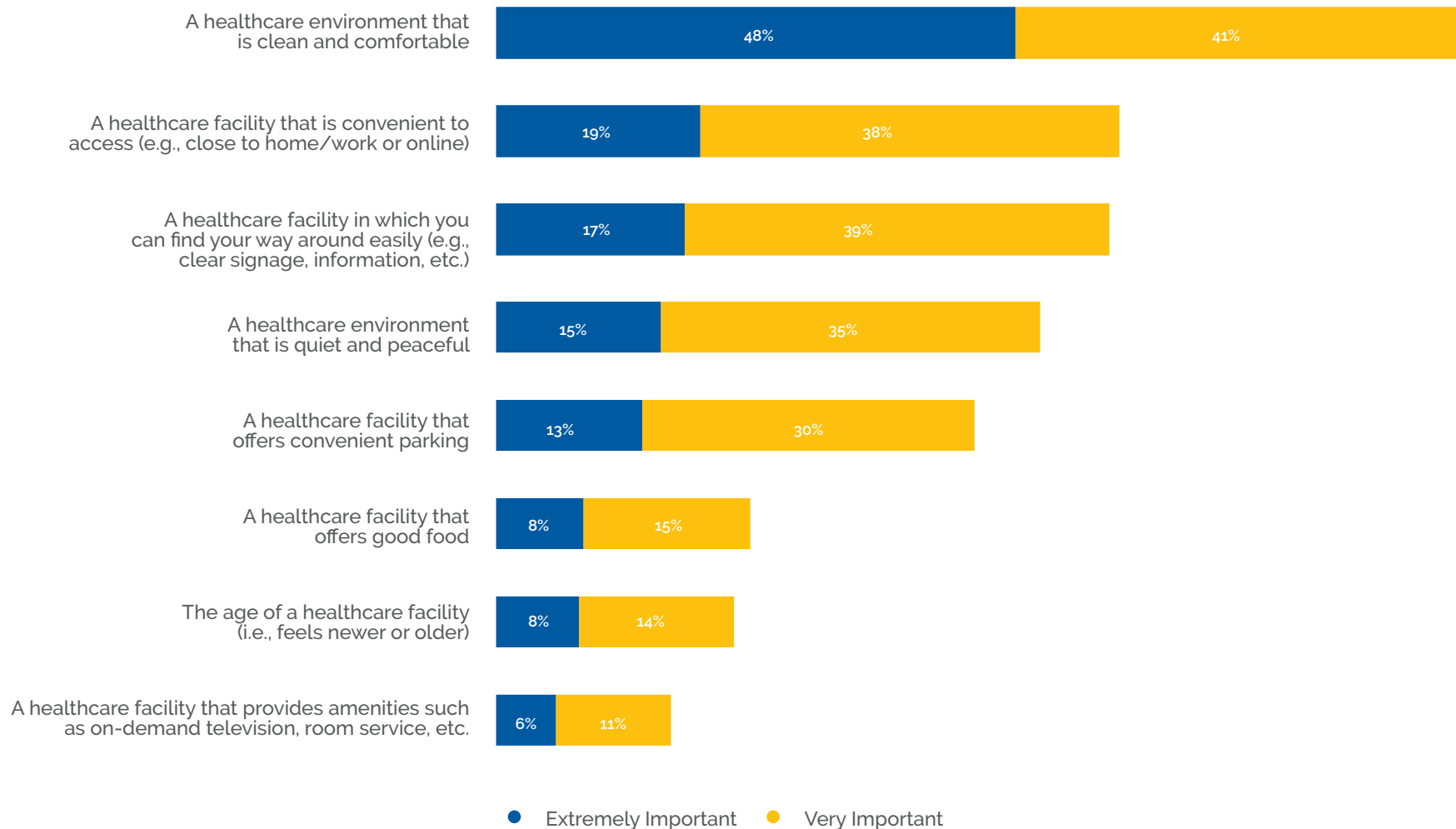
Figure 8. PROCESS: When you think about having a good patient/family experience, how important are each of the following to YOU? (% Extremely + % Very important)



“Place” impact on experience.

Responses to the “Place” category are shown in Figure 9. Consistent with our last consumer core inquiry, having a clean and comfortable healthcare environment is the most important aspect that impacts experience, with 89% of people responding to this item as “Extremely important” or “Very important.”

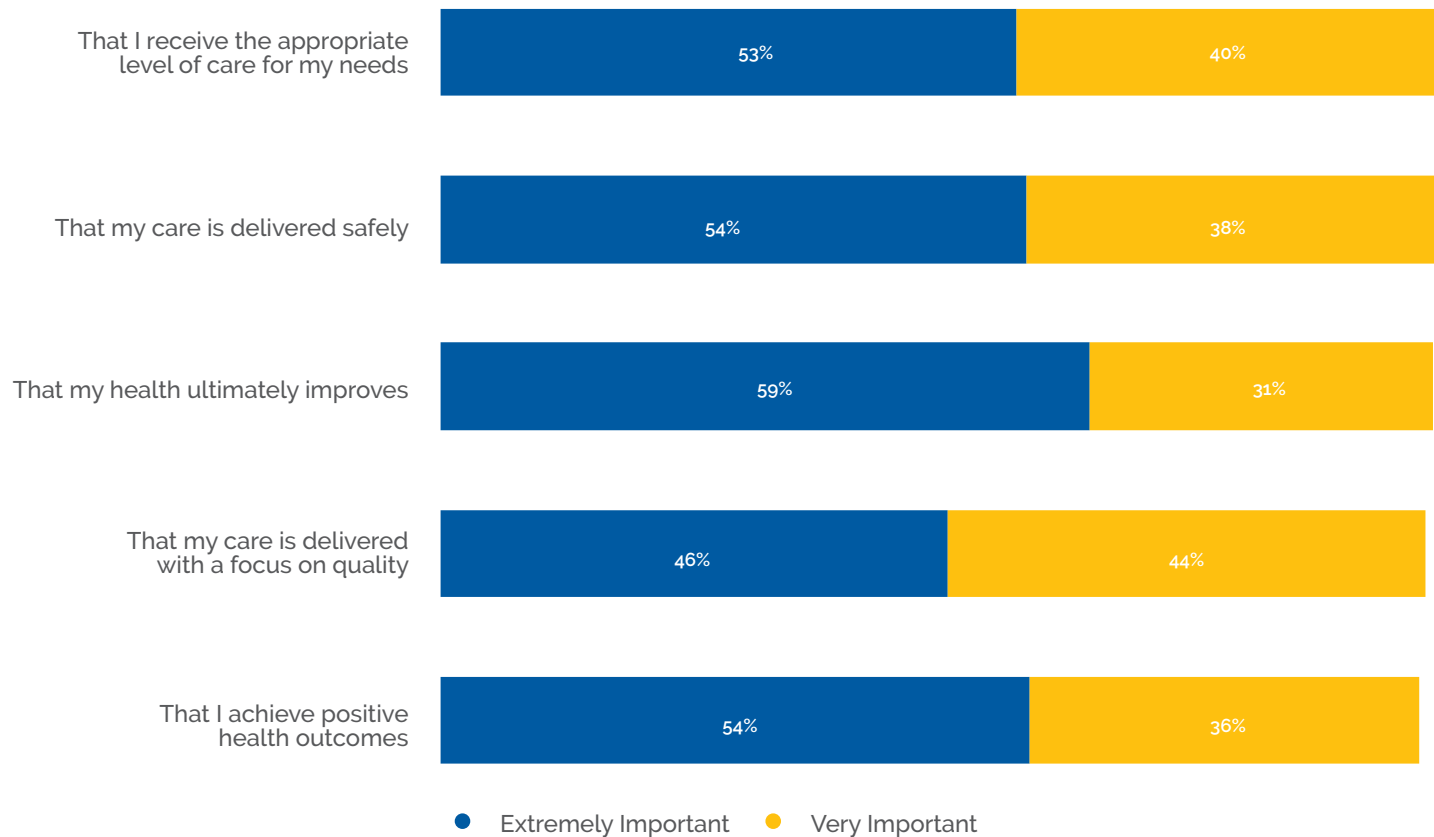
Figure 9. PLACE: When you think about having a good patient/family experience, how important are each of the following to YOU? (% Extremely + % Very important)



“Care Delivery” impact on experience.

Responses to the “Care Delivery” category are shown in Figure 10. Compared to the categories of “Process” and “Place,” this category received more “Extremely important” and “Very important” responses across all response options. While all responses for “Care Delivery” were ranked high, the most important item to people was receiving the appropriate level of care for their needs, with 93% of people responding to this item as “Extremely important” or “Very important.” The expectation “that my care is delivered safely” was just behind this item, with 92% of people responding “Extremely important” or “Very important.”

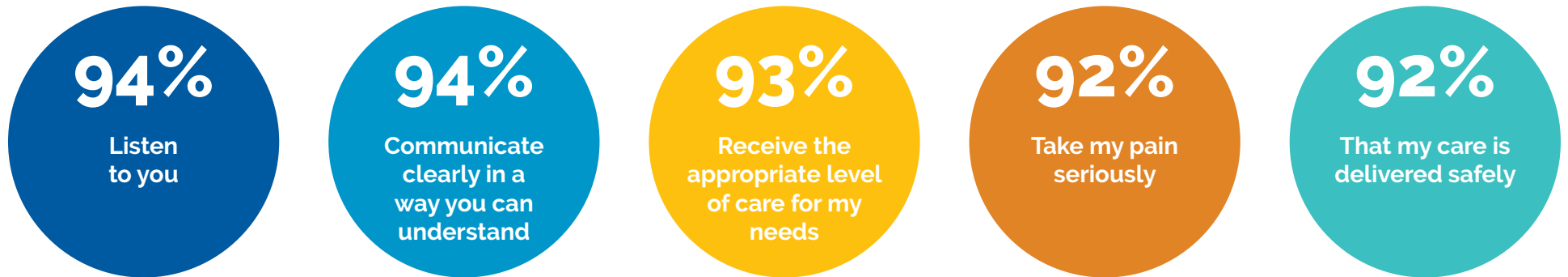
Figure 10. Care Delivery: When you think about having a good patient/family experience, how important are each of the following to YOU? (% Extremely + % Very important)



Of interest in looking at the overall importance of all items rated is the comparison of what stands out for people. The top five items across all segments were (% "extremely" and "very important"):

These overall results reinforce that people want to be treated as a human being first and want to ensure their care is safe and appropriate.

Figure 11. Top 5 Items of Overall Importance Across All Segments



The quality of interpersonal communications is reinforced in how people describe experience.

We again asked consumers to think of words and phrases that would describe a positive and/or negative experience they had in healthcare. The emerging words underline what the results from this inquiry have revealed and reinforce people's need for better relationships with their providers and increased trust in healthcare overall.

We specifically asked people, "Think of a specific time when you or someone you know had a good (or positive) patient experience or a bad (or negative) patient experience. What words or phrases would you use to describe this experience?" The distinction that emerged was abundantly clear.

Responses to a positive experience reflected words such as doctor, care, good, time, experience, and time (Figure 12). It is interesting that these are many of the same words we find embedded in the items we asked people to rate above in terms of how important they were.

On the other hand, negative experiences reflected words such as time, dismissive, rude, wait, bad, and long (Figure 13). As much as the positive items reinforced the importance of the relational aspect of care to experience, the negative responses put an exclamation point on the reality that there is an opportunity to do better with patient-provider relations. These results reflect the current transactional nature of healthcare today that are barriers to good experiences for consumers of care.

In the next section we will explore the implications of missing this critical opportunity.

Figure 12. Think of a specific time when you or someone you know had a good (or positive) patient experience. What words or phrases would you use to describe this experience?



Figure 13. Think of a specific time when you or someone you know had a bad (or negative) patient experience. What words or phrases would you use to describe this experience?



IMPACT OF PATIENT EXPERIENCE

The kind of experience one has continues to dictate choices and actions.

In asking whether people had a positive or negative experience in the last three months, 59% of people have had what they would consider to be a positive patient experience, while 31% did not have what they would consider a positive patient experience (Figure 14).

When asked about recent negative healthcare experiences, 19% of people said they have had what they considered to be a negative experience in the last three months (Figure 15).

Figure 14. Have you had what you consider to be a positive patient experience in the past 3 months?

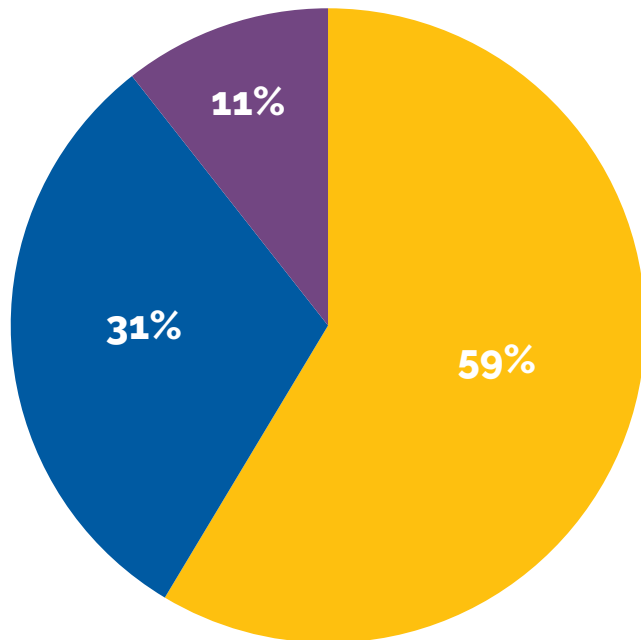
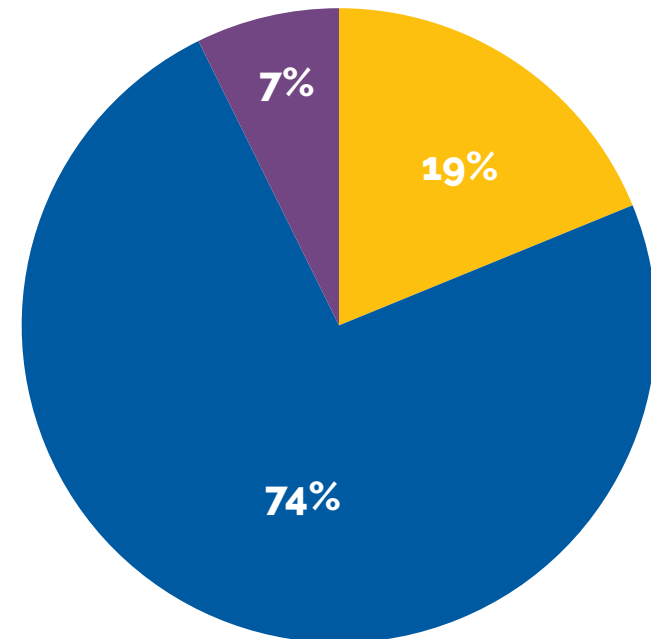


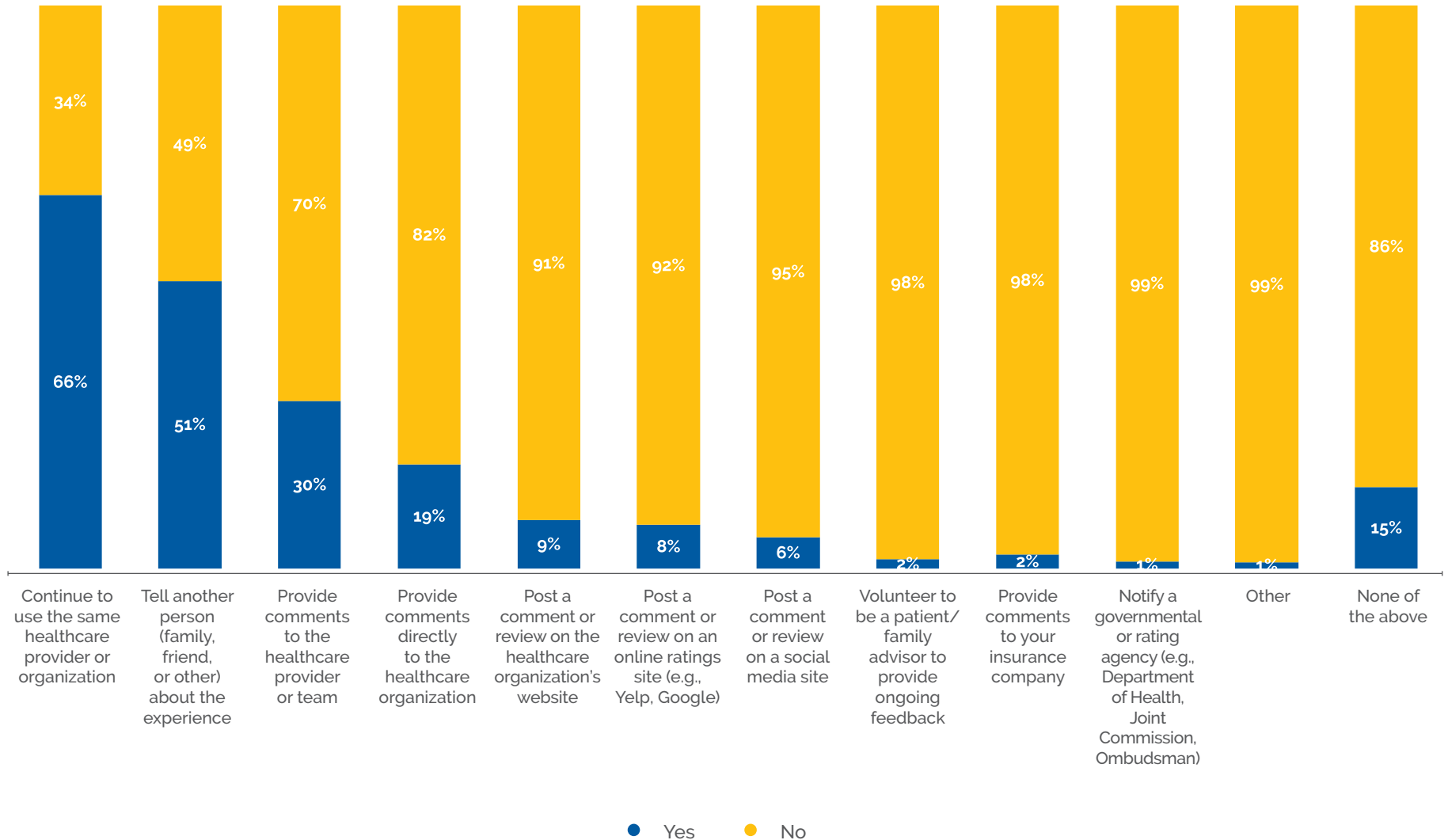
Figure 15. Have you had what you consider to be a negative patient experience in the past 3 months?



● Yes ● No ● I don't know

Similar to the 2022 inquiry, when people had a positive patient experience, the most common actions taken in response were staying with the provider and recommending the provider. In this quarter's inquiry, 66% of people would continue with their provider after a positive experience and 51% would tell a family or friend about it (Figure 16).

Figure 16. As a result of your positive patient experience, did you do any of the following?

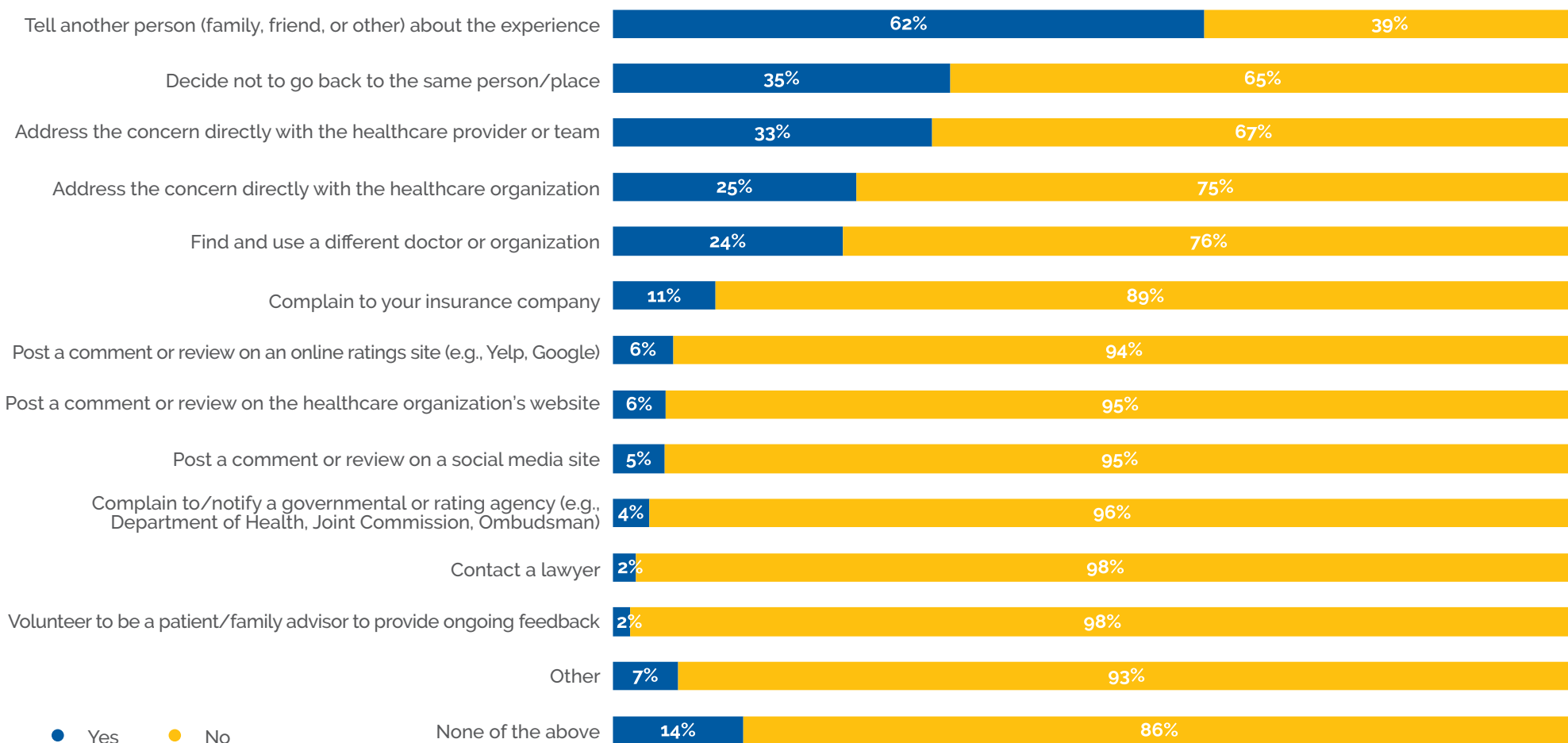


Also similar to the 2022 report, people who had negative experiences were more likely to take action as a result of their experience than those with positive experiences. For those who had a negative experience, the top actions taken were telling others about the experience (62%) and deciding not to go back to the same place for care (35%) (Figure 17). These actions were the most commonly reported actions taken in the previous report as well.

The bottom line is that consumers remain consistently clear on what matters to them and what constitutes good, positive and strong experiences. They are also clear in how experience will influence and dictate their actions and the stories they share with others. This is a foundation-setting reality. The items people consistently tell us are important must be priority actions for healthcare organizations across the continuum of care.

Note: A larger global consumer study is currently underway that will look at consumers' perspectives across six continents and provide national comparisons from around the world.

Figure 17. As a result of your negative patient experience, did you do any of the following?



● Yes ● No

GENERATIVE ARTIFICIAL INTELLIGENCE (AI)

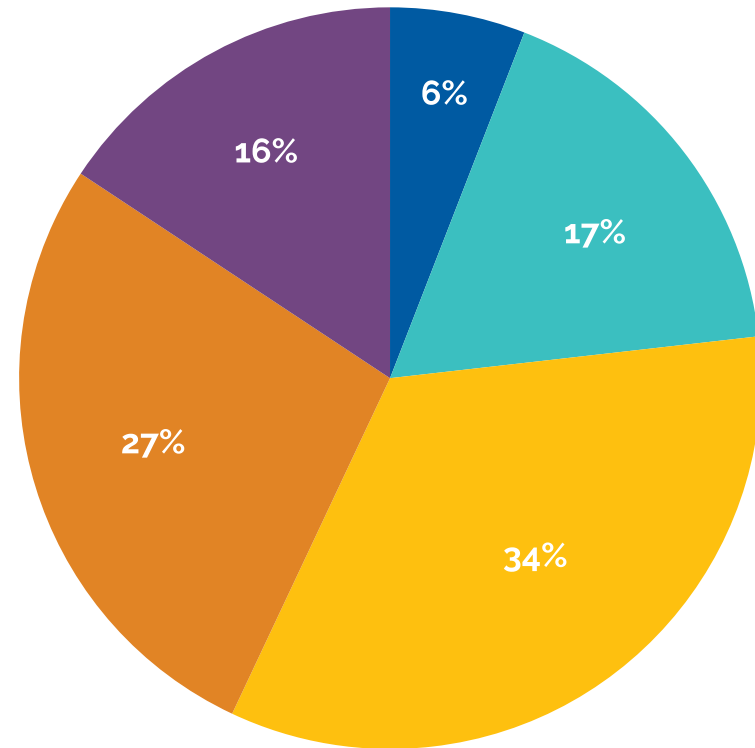
The application of and engagement with Artificial Intelligence (AI) has skyrocketed in the past months. It has become part of general conversations on how we will lead healthcare forward and how the industry should best engage in AI as a resource for making healthcare more effective and efficient overall.

Through the lens of PX Pulse, we want to understand how AI was perceived by, and potentially impacted how, U.S. consumers engage in healthcare. This initial inquiry provided some foundational and interesting insights.

Understanding of generative AI.

When asked to rate their understanding of generative artificial intelligence (AI), the majority (57%) of respondents indicated they have at least some understanding of AI (Figure 18). Forty-three percent (43%) of people have little to no understanding of AI.

Figure 18. How would you rate your understanding of generative artificial intelligence (AI) (e.g., ChatGPT, chatbots, etc.)?



- Excellent understanding
- Good understanding
- Some understanding
- Little understanding
- No understanding

Use of generative AI.

When asked whether they used AI, only 37% of people indicated they have used it (Figure 19). Of those who said they have used it, only 10% indicated they have used AI for their own healthcare (Figure 20).

Figure 19. Have you ever used generative artificial intelligence?

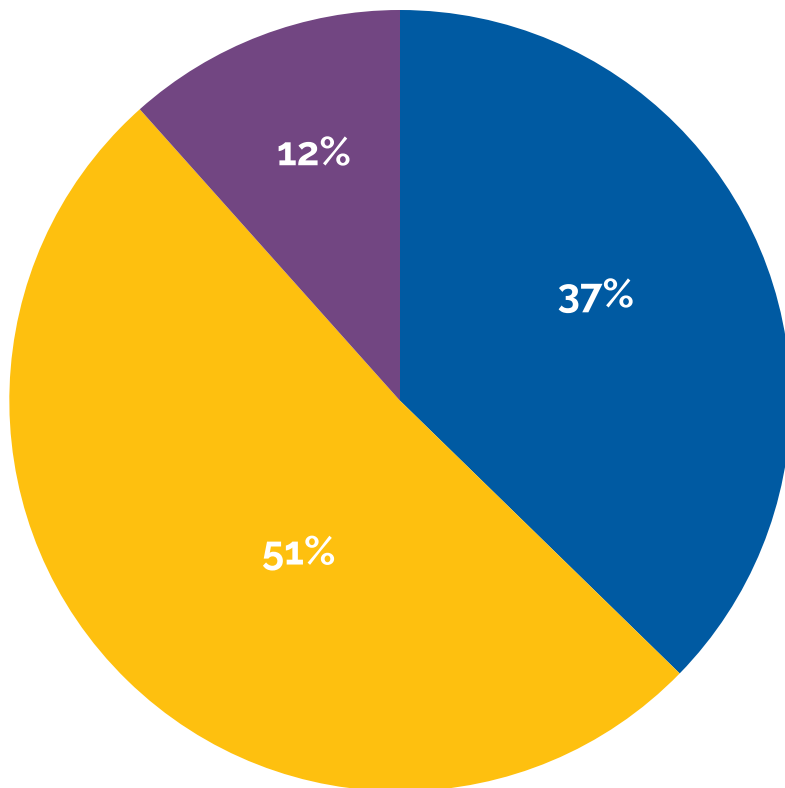
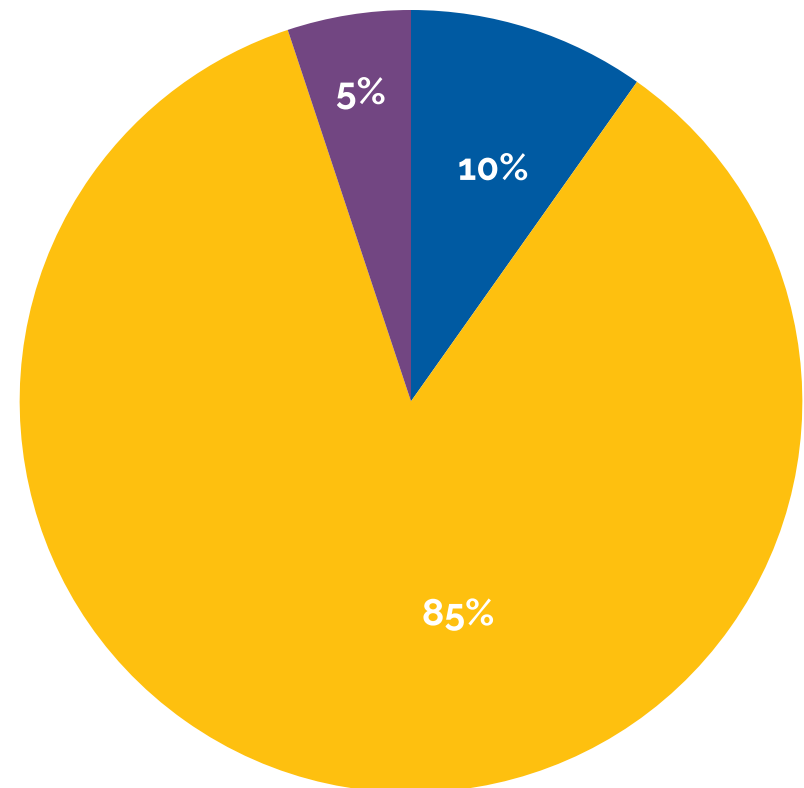


Figure 20. Have you ever used generative artificial intelligence for your own healthcare?

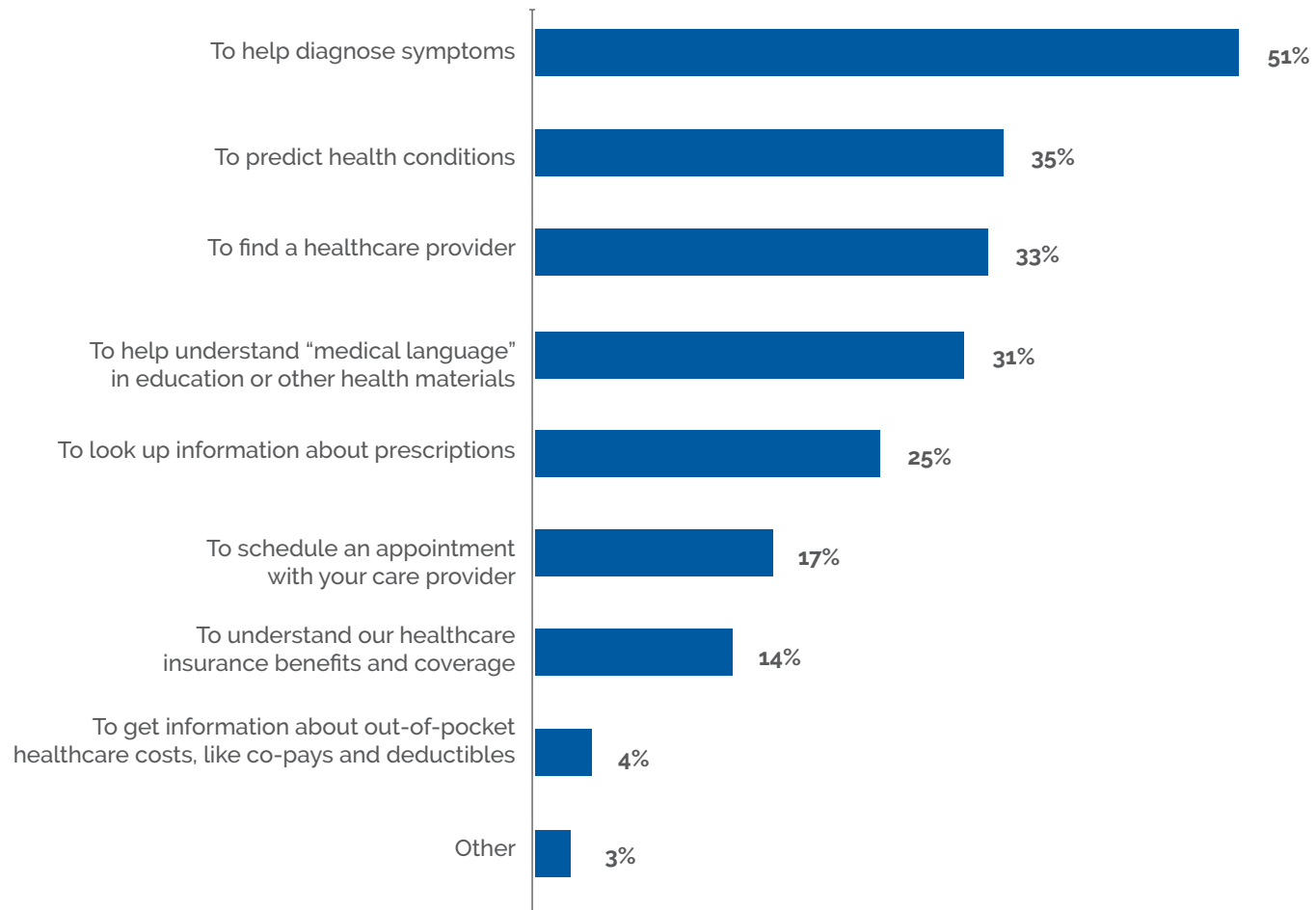


● Yes ● No ● I don't know

Reasons people use generative AI in their healthcare.

The number one reason people use AI for their own healthcare, and the only reason a majority of respondents selected, is to help diagnose symptoms (at 51%). Other reasons people use it include to predict their health conditions, find a provider, or understand medical terminology in health materials (Figure 21).

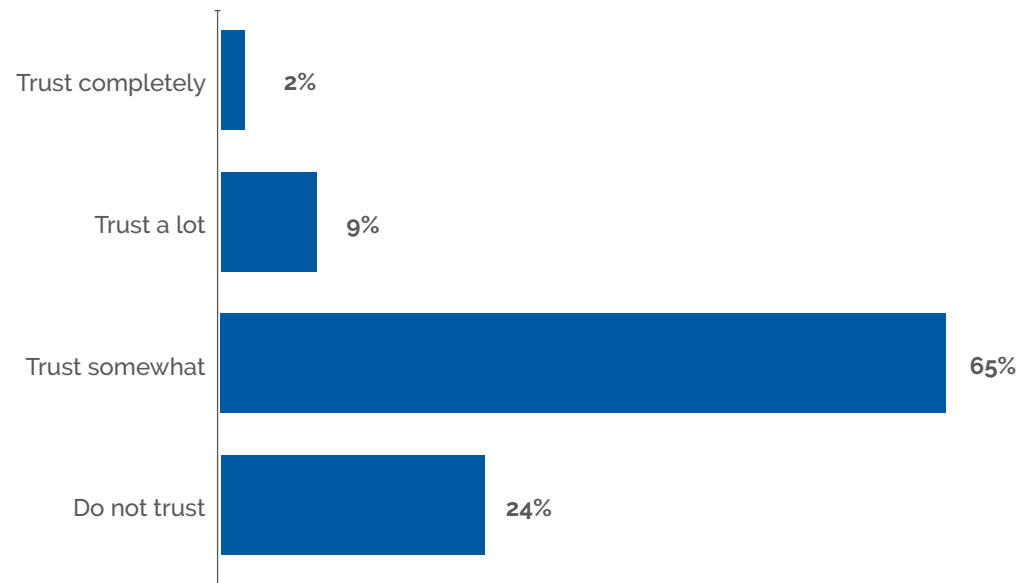
Figure 21. When using generative artificial intelligence (AI) for your own healthcare, did you use it for any of the following reasons?



Trust in generative AI.

Sixty-five percent of people only somewhat trust the answers provided by AI, and almost a quarter (24%) of people said they do not trust the answers provided by AI. Only 11% of people said they "trust completely" or "trust a lot" the answers provided by this technology, the lowest ranking of all response options (Figure 22). This low percentage of people trusting in AI may be a reflection of the newness of the technology and how to best use it, particularly for healthcare. It will be interesting to see if this trust shifts as understanding of AI and its use expands.

Figure 22. To what extent do you trust the answers provided by generative artificial intelligence (AI)?



What this initial look at the implications on AI and healthcare from the consumer perspective reveals is that while healthcare organizations may be feeling a sense of urgency to engage in this new technology, they also need to be aware of where their consumers currently stand. There will be some work involved in educating, informing and building confidence and trust in consumers if healthcare organizations seek to use AI effectively in the future.

KEY TAKEAWAYS

As we opened, we spoke to the clarity this release of PX Pulse provided in both the opportunities of the day and actions those leading healthcare can take to address them. The headlines revealed both concerning trends and recommendations to tackle them. Some critical takeaways include:

- Consumer's perception of quality of healthcare remains unchanged for the last three quarters, hovering around 40% of people perceiving quality as "Very good" or "Good."
- The perception of experience has also remained unchanged and remains at its lowest point of 62%, a significant drop from 68% one year ago.
- Cost continues to be top of mind for and most important to the U.S. consumer. Cost of premiums jumps to the top slot (41%) from its third position last quarter, followed by tied rankings for out-of-pocket costs and affordable insurance options as the most important healthcare issues, both at 37%.
- The importance of experience slipped slightly but is still high with 91% of people saying experience is "Extremely important" or "Very important" to them. The top three reasons why experience is important to people is reflective of their focus on their own health and well-being.

As we reexamined what is most important to healthcare consumers, our query explored the impact of these items on experience through the lenses of People, Process, Place, and Care Delivery. Results reflected:

- People: "Listen to you" and "Communicate clearly in a way you can understand" remain the top two items of importance for people to having a good experience. "Take your pain seriously" and "Provide a clear plan of care and why they are doing it" saw gains in consumer rating, followed closely by "Give you confidence in their abilities." All were part of the top five items of importance to consumers.
- Process: The top three responses reflect that scheduling, ease of billing, and receiving a clear treatment plan at discharge are the most important processes to a good experience.
- Place: Having a clean and comfortable healthcare environment is the most important in this category, with 89% of people ranking this aspect as "Extremely important" or "Very important." This stands out well above any of the other factors related to place.

- Care Delivery: Responses for this category were ranked high across all response options, but the most important item to people was receiving the appropriate level of care for their needs, with 93% of people ranking this item as "Extremely important" or "Very important." Other items of importance include safety, quality, and positive outcomes.
- Open responses to people's view of a positive experience reflected words such as doctor, care, good, time, experience, and time, while the words of negative experiences included, dismissive, rude, wait, bad, and long.
- In both cases of good (59%) and bad (19%) experiences, people responded they would tell others. In the case of bad experiences, over a third (35%) would not come back to the same provider, while those having positive experience would continue to use the same healthcare organization 66% of the time.

Finally, our query explored the understanding people have of generative artificial intelligence (AI). Responses reflect:

- 57% of people said they have at least some understanding of AI.
- 37% of people indicated they have used AI, but only 10% have used it for their healthcare needs. Of those, 51% of people have used AI to help self-diagnose symptoms, the number one reason people use it.
- Few people trust AI completely (2%), yet 65% trust it somewhat to provide reliable answers to their questions.

At the opening of this report, we reflected on the evolution of trends we are seeing in the experience movement. Yet at the same time, while issues and opportunities have clearly been realized, the items that are important and the actions to address them remain opportunities.

Consumers in healthcare want to feel listened to, they want to understand their information and plans of care, and they want those in healthcare to take their pain seriously. To do this, we are called to remember that, at the core of healthcare, we are human beings caring for human beings. This means treating people with courtesy and respect and expressing empathy and compassion in all healthcare interactions. Demonstrating these qualities will drive us to more relational experiences versus transactional ones.

While the rankings in quality and experience may feel stagnant, they reflect the broader operational realities that healthcare now faces. What is evident is that the opportunities healthcare has in front of it are significant and require new and forward-thinking conversations around financial challenges, staff shortages, and strategic shortfalls. In keeping things simple, in honoring the person in front of us, and then in executing on plans to reinforce those fundamentals, the opportunities for healthcare's future far outweigh the challenges in our way. It is now up to each of us to choose this clear focus and act.

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