



# Consumer Perspectives on Patient Experience 2021

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## THE BERYL INSTITUTE

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

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# The Consumer Voice Rises

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In 2018, we first explored the question, “What really matters to healthcare consumers?” The inquiry at that time, as with this follow-up study two years later, was focused on the general healthcare consumer. Its purpose was to understand to what extent the healthcare experience was important and what aspects of the experience are of greatest importance to people.

The global conversation on the patient experience has progressed significantly in recent years, from a debate on if experience is essential and what it includes, to, now, what is ultimately most critical about the experience and how is it most effectively delivered. This has been driven by an increasing realization that in healthcare the experience provided is a human one, where human beings care for human beings; in healthcare, the experience provided impacts all it serves and is impacted by all who choose to serve.

It must also be acknowledged there are two complementary segments of people who engage in healthcare – first, patients who, often without choice due to illness, accident or otherwise, find themselves actively engaged in and by the healthcare system; and second, the general consumers of care who are users of the larger healthcare system overall. This distinction is subtle but important as the experience all have is both individual in nature but influenced by collective action. Ultimately, the things that matter to people

who experience healthcare seem to be driven from a foundational set of needs and priorities. This study reinforces that very point discovered two years ago.

In the last year, the world has found itself in a once-in-a-century health crisis. Yet for all the differences and diversity globally, people around the world, regardless of nation or station, are having one shared experience. Noteworthy here is that the pandemic itself has revealed some critical systemic issues that actually show the disparities caused by nation and station. Yet for all the COVID-19 pandemic has elevated in physical, social and emotional strains, it has also stretched healthcare systems to the brink of exhaustion and often beyond. It could be easily understood in times like these if people saw “experience” as a thing, a nice-to-do, or just an amenity in healthcare that would fall off the edges of healthcare’s plate.

Yet when you look at all of the actions of the last year, in the face of some of the most trying and challenging situations most have ever experienced, people worked harder than ever to make healthcare more human. The human experience has been challenged, as families, loved ones and care partners could not be with one another, and instead nurses or doctors held hands and held up tablets to provide any sense of connection they could for as many as they could. Yes, the clinical needs of these patients were tantamount,

“As we mourn for the millions lost in the year gone by, we reflect too on the many millions of stories that like stars in the sky represent the light that healthcare brings to all.”



but those needs were equally part of their experience. It is why the world has risen up to thank in full chorus the powerful work of healthcare workers worldwide.

In the face of a challenge to our very humanity, people never forgot or were willing to let go of their humanness. In fact, so many fought hard to ensure it was realized. In coming together around what matters, people were able to achieve great things even in the midst of crisis. And what was found in this study, even in the midst of this crisis, is that those ideas that were most important, what people seek in their healthcare experience, have not and will not waver.

People who engage in and seek the help of healthcare are humans beings first with essential needs and desires – to be cared for effectively and safely, to be heard, communicated to and respected, to be seen. These ideas are not foreign to anyone. These ideas should not be hard to address in healthcare let alone broader society. They have increasingly become more critical in a world where vulnerabilities are laid bare and hopes for health and well-being rise high. That is what the

voices of those who engaged here said, that is what they reinforced was essential and that is why even in an historic moment as this, their collective voice rises.

It is incumbent upon all in healthcare now and in moving forward to acknowledge the experience conversation for what it is. It is not about surveys and scores or about ideas removed from moments, but it is about the moments themselves, the encounters provided, the humanity that is fostered and the actions that ensure it thrives. As we mourn for the millions lost in the year gone by, we reflect too on the many millions of stories that like stars in the sky represent the light that healthcare brings to all. This is the experience that is provided, heroes' work, provided by ordinary people, who do the extraordinary every day. What the voices of those who replied in this inquiry show us is that this work matters no matter the moment in history we find ourselves; it is what people seek from healthcare; it is what they expect. And it will remain up to all who work to elevate the human experience in healthcare and beyond to ensure it happens...always.



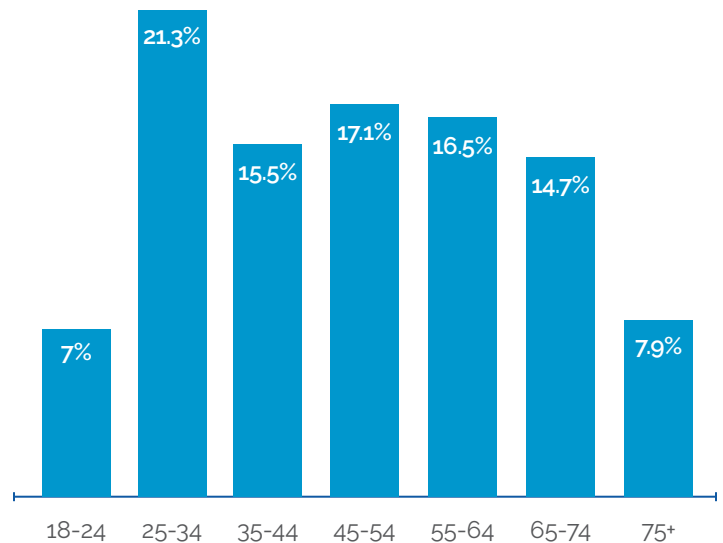
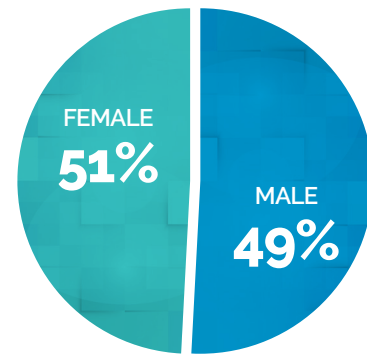
# Methodology

As in 2018, this exploration again looked to explore what matters most to those who engage in healthcare. Based on the same set of 34 items studied, as well as additional supporting questions, a group of over 2000 people were surveyed in the last few months of 2020. This sample size corresponds with the initial inquiry in 2018 and was replicated in the same locations.

Over 1000 consumers from the United States were surveyed in late September to early October 2020. These initial results were shared in the October 2020 PX Pulse.<sup>1</sup> Additionally, 250 responses were collected from Australia, Canada, the Philippines and the United Kingdom in early December 2020. To match the study in 2018, the selection of countries was also based on geographical spread and English as a primary language to ensure consistency in the data collection process.

By design, the study provided a range of ages from 18 to 94. Just over 28% of respondents were between 18-34 and almost 23% of respondents were 65 and older, with over 49% of respondents in the 35-64 age range. This represents slight increases in the younger and older groupings from 2018. Our study balanced between those identifying mostly as female (51%) and male (49%). (Figure 1)

This balance of locations and demographics provided a diverse data set from which to explore and compare. As this is the second exploration, there is a greater ability to conduct more national comparisons as well.



**Figure 1. Demographic breakdown for responses by age and gender**

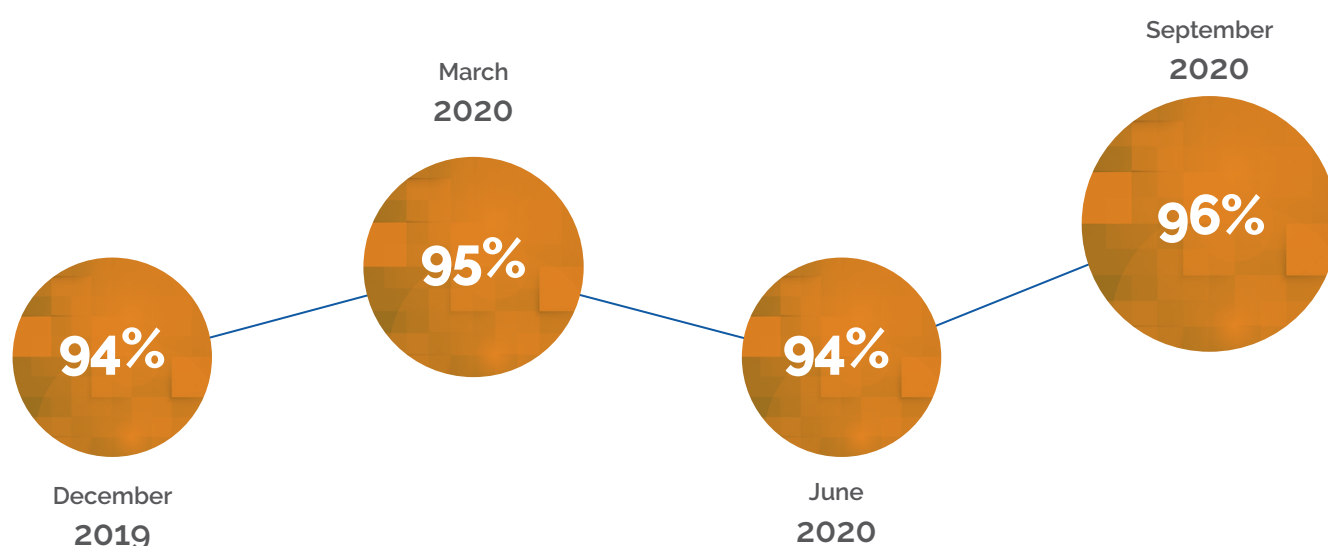
# Experience Remains Essential

The idea that experience is grounded in the “sum of all interactions” remains an essential premise to this ongoing study. The belief that it is “based on an organization’s culture” also represents a fundamental idea on which this inquiry was not only initially grounded but that was substantiated in its findings.<sup>2</sup> The experience people have in healthcare touches on the outcomes they have, driven by clinical quality and safety; the personal encounters they have, fostered by positive interactions built on effective communication and respect; and the places in and ways through which they receive care. This inquiry revisits and ultimately reinforces those very ideas.

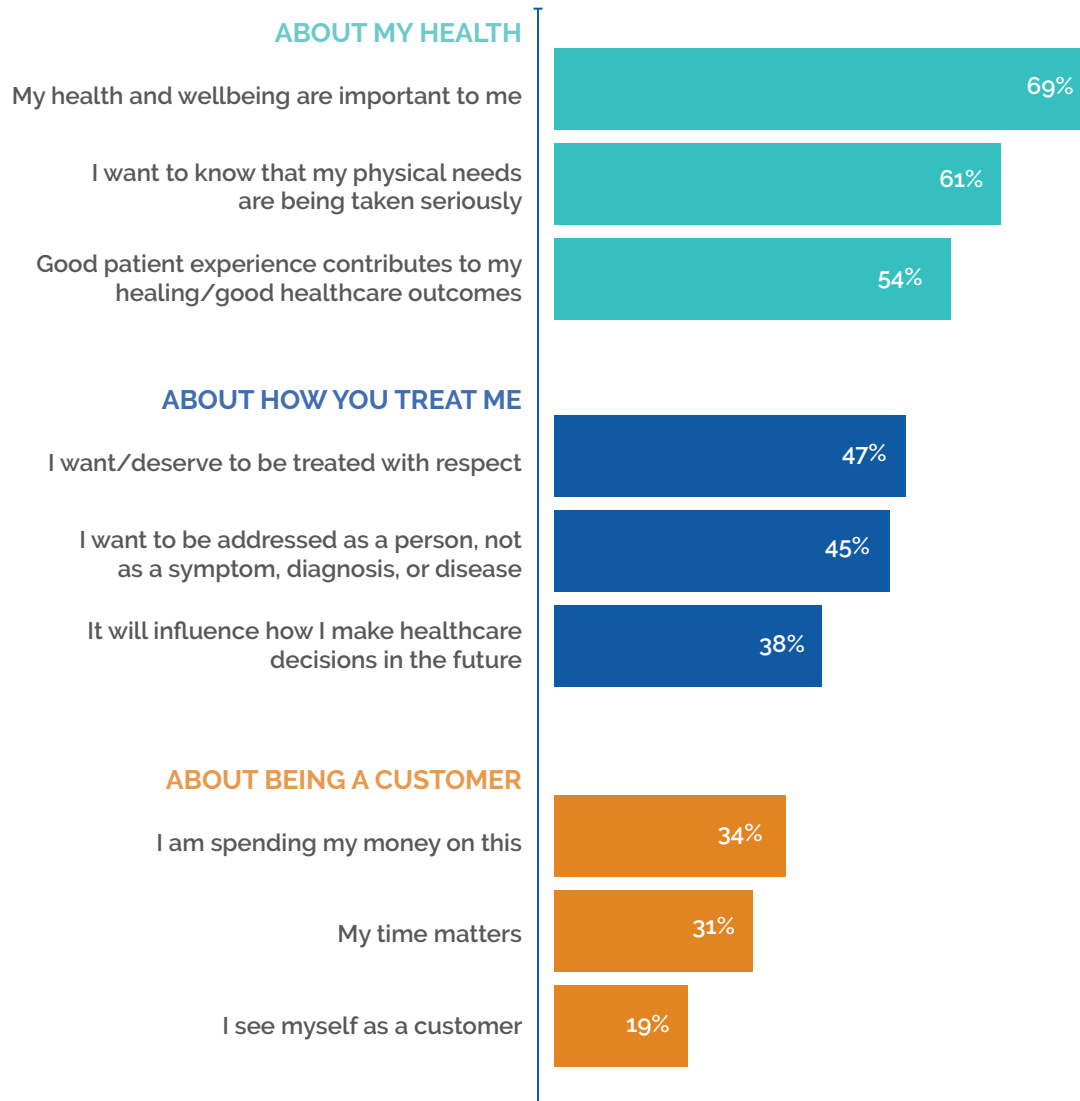
The inquiry conducted for this study was also grounded in a belief that, in general, the healthcare consumer sees experience as important. What was found in 2018, that 60% of consumers felt experience was important and over 90% said it was very or extremely important,

remains true. In fact, in our quarterly tracking report of U.S. consumer perspectives, PX Pulse,<sup>1</sup> even in the midst of the pandemic, the percentage of respondents consistently reported at 94% or higher on the question, “Overall, how important is it that you have a good experience as a patient?” with the most recent quarter reporting the highest at 96%. (Figure 2) In the face of a pandemic and at the end of a long, trying and tenuous year, experience found its peak in importance.

Similar to what was found in 2018, the ranking of “Why is Patient Experience Important?”, now part of the PX Pulse core tracking questions, has held consistent. In the 2018 study, it was discovered that people first related experience to being “About my health,” then “About how you treat me” and finally “About being a customer.” This most recent ranking of this question reflected that same sentiment. (Figure 3)



**Figure 2. Overall, how important is it that you have a good experience as a patient? (% Extremely and Very Important)<sup>1</sup>**



**Figure 3. Why is having a good patient experience important to you?**

This sustained focus and reflection of healthcare consumers that experience is about their health further underlines the essential and strategic importance of a focus on experience overall. With those experiencing healthcare identifying first that they engage in healthcare for their own well-being and that their physical needs matter and are being taken seriously reflect the core intent of healthcare itself, to care for people. This underlines that people engaging in healthcare see all that is done to ensure safe, quality outcomes as part of their experience and is further reinforced later in asking consumers globally what they believe is included in experience overall.

Not far behind again are the responses reflected by how people are treated in healthcare – being treated with respect and being addressed as a person. These

ideas take on even greater importance as we look at how people rate the core elements of experience overall, below, including the impact on decision-making. What remains true over time and in the trending between studies is that people continue to identify that experience matters to them, and for clear reasons, their health matters and their individuality matters.

Notably being a “customer” of care reports as third, again in contrast to health and dignity. And if the idea that what matters to those who are being served by healthcare is to be taken seriously and acted on, what consumers of care continue to tell us, even in the most critical health crisis of the century, is that the experience matters to them and requires a committed and strategic focus to ensure this need is met.

# The Critical Elements of Experience Sustained

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To understand what it is that healthcare must work to deliver and what is expected of it from those who use its services, this study again asked consumers to share “What is important to you?” As in 2018, a series of items were presented to rate from “not at all important” to “extremely important,” and the results were amazingly consistent over time.

In the 2018 exploration, items were reviewed in four main segments - outcomes, people, process and place - highlighting the importance of healthcare experience to consumers. In fact, the segments were ranked in that order (according to average score) with people identifying outcomes as most important. Following, the average score for people-related items outranked process items and were significantly above items related to the place in which care was delivered. Reinforcing now, as in 2018, the ranking does not suggest any of these items are not important, but rather they may take on less importance to those seeking care and to their care experience overall. The lessons this provided in 2018 remain true and critical to this day and should continue to be an essential strategic consideration for healthcare organizations.

There was an interesting phenomenon to note in looking at this year's data that should be observed in the context of the year in which this data was collected. Responses in the “extremely important” category dropped for every

item surveyed. This does not seem to reflect a shift in importance in so much as the moment in which we found ourselves in 2020 where the world was facing more “extreme” realities and a more cautious eye was being taken on many things. Of interest is that even with this more cautious response, the actual ranking of importance held rather consistent over the period.

For the purposes of this year's exploration, especially noting the critical moment in which the healthcare system found itself in the past year, it was important to reinforce the importance of outcomes to consumers. As in 2018, the ratings they received put them at the top of all items scored, and as was then, outcomes scored in the top ten items for people overall. This reflects a very important point long central to those advocating for the experience position, that outcomes matter to those engaging in healthcare, and they see those outcomes as a fundamental part of the experience they have, not something distinct from it.

## Outcomes Matter

To reinforce the very point that outcomes matter, the five questions asked in the study related to outcomes again had the highest average “extremely” score, as it did in 2018. While the items shifted ever so slightly in order of importance, their recognition as essential to experience held strong. As was noted in 2018, it is

“Outcomes matter to those engaging in healthcare, and they see those outcomes as a fundamental part of the experience they have, not something distinct from it.”



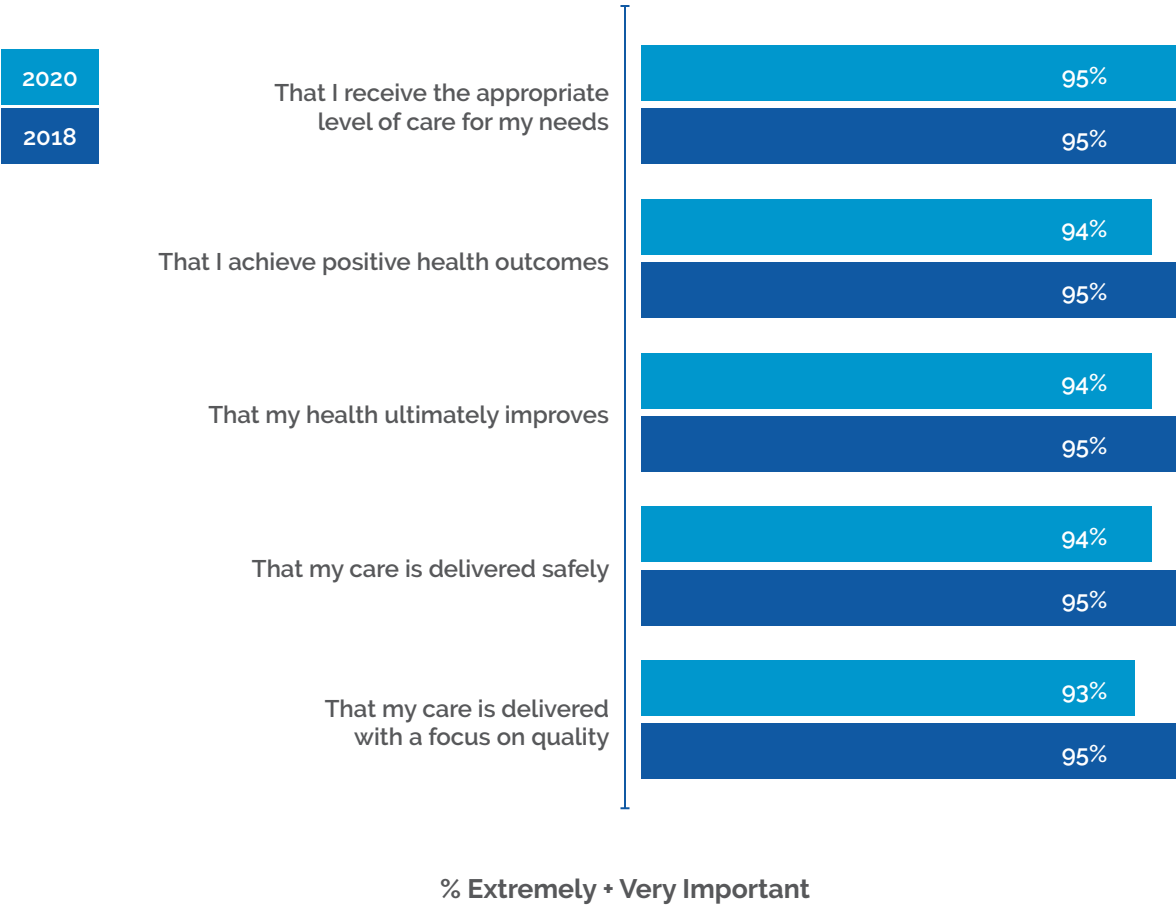
important to reiterate today not just what the data reveal, but the insights from a year of living through a health crisis, where healthcare, the healthcare experience and the outcomes that it strives to provide were front and center in the general conversation. While healthcare has always been a known, acknowledged and respected part of life for many, its presence in the last year was not just felt, it was visibly seen and experienced by all in some way as healthcare rose up to tackle the challenge of the day and was celebrated for what was able to be accomplished in the face of this dire time.

As shared in 2018, the lessons from this data reinforce the critical point that outcomes matter, and now even more people are aware of how. The 2018 paper reported:

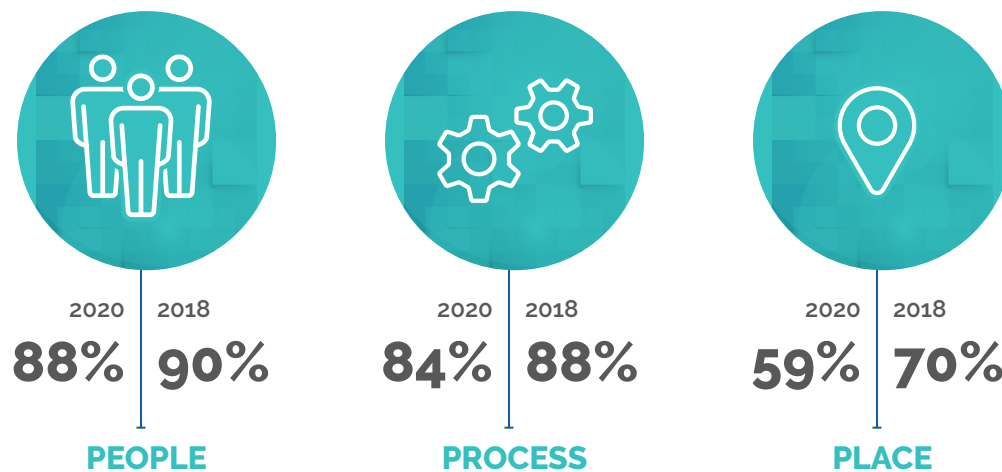
*The lesson here may be most important for those providing care. Organizations can no longer isolate quality or safety as tactical elements of care delivery, but rather they must be woven into a broader strategic conversation about what matters to patients and families, to consumers of care and to the experience they expect.<sup>3</sup>*

It also suggests that people expect healthcare to provide appropriate and positive outcomes when they seek them. The priorities are reflected in Figure 4 below.

When we use outcomes as a foundational idea to the experience people have in healthcare, then the priorities for what matters to them take on even greater significance. This study reveals outcomes alone are not enough to meet people's needs, and while they are seen as significant, they are not the only item people seek and they do not stand alone as all that healthcare does or is accountable for. Research has long shown that the way in which people are engaged in care has an impact on the capacity to achieve the outcomes desired.<sup>4</sup> This idea is not lost in this study either, as the factors associated with the category of "people" as reported in 2018 and again here remain some of the highest rated items overall. An exploration of this data follows.



**Figure 4. When you think about having a good patient/family experience, how important are each of the following to you?**



Averages of % Extremely + Very Important responses

**Figure 5. When you think about having a good patient/family experience, how important are each of the following to you?**

## Priorities Persist

As in 2018, the core items respondents rated were identified as associated with “outcomes” as those noted above, and then “people,” “process” and “place” to better understand the importance of these categories. Again, these categorizations were not revealed in the survey questions, and people received the rating question in randomized order. In analyzing the results, the overall order of importance of these items to consumers has not changed.

The story this reveals is that how we engage with those seeking care continues to matter to them above all else. (Figure 5) “People” items ranked highest in importance, followed by the processes implemented. The third item, “place,” again is reflected as still important, but the interesting point is its drop since the 2018 study. An observation in the specific items surrounding “place” follows, but this general shift reflects a year of crisis in which the idea of where care was given was much less of priority for most.

What these rankings show us again is a powerful reminder of the idea that in healthcare we are human beings caring

for human beings. And while we acknowledge that many who engage in healthcare may not choose to be there, that they are identified as patients, they still are people, with stories and purpose, heart and dreams, and this cannot and must not be lost in a world where clinical classification or diagnostic codes overlook that the person we are caring for is a mother or a brother, a child or a friend, they are Rosa or William, and they seek healthcare to help them sustain their humanity as much as care for their health.

Of note when we look at the rankings including the segment on “outcomes” with “people,” “process” and “place,” it is of particular interest that while the top-rated item overall in extremely + very ratings was “I received the appropriate level of care for my needs,” the next two items were in the “people” category in close ranking. They were (and notably remain the top items from 2018) “Communicate clearly in a way I can understand” and “Listen to you.” This reinforces the essential point that if the goal is to provide appropriate care, then the human being in the exam room or hospital bed must be acknowledged and heard, communicated to and engaged. This will lead to all that is aspired to in healthcare in ensuring both health and overall well-being. It also sets the stage for the remaining rankings.

“While we acknowledge that many who engage in healthcare may not choose to be there, that they are identified as patients, they still are people, with stories and purpose, heart and dreams, and this cannot and must not be lost.”

## Top 10 Items Show Subtle But Tangible Changes: A Focus on People Remains

In looking at the top ten items overall, there are some subtle but interesting shifts. Again, as in 2018, the “people” related items dominate the highest ranked items. (Figure 6) Of note is that the items “Communicate in a way I can understand” and “Listen to me” remain paramount for people. At the same time, while “Treat me with courtesy and respect” dropped slightly in score, two items around a more tangible aspect of engagement climbed the list. Namely, “Providing a clear plan of care” and “Asking questions to understand needs and preferences” moved to the top five in the list. The latter item on asking questions was actually the only item that increased in score from 2018 to this study. In addition, a new item joined the top ten, “An easy process for transitioning healthcare information,” which moved up replacing the item on “scheduling in a reasonable time.”

One item on “place” again finds itself into the top ten items as well. As noted in 2018, most items regarding “place” received the lowest ratings. The thought on this consistently lower ranking is not to suggest these items do not have importance, but that people have other and more pressing priorities as they enter the healthcare setting. With that perspective on the items of “place,” it is telling that people continue to rate the item “a healthcare environment that is clean and comfortable” well above any other “place” related item.

These findings reinforce the idea that how we engage people and processes that are clear and easy (closely associated with communication) remain of greatest importance to consumers. What people continue to seek from healthcare is the acknowledgement of their needs and effective communication of their plans and processes, and they express a clear and stated desire to be partners

	ITEMS BY RANK	2020 % OVERALL EXTREMELY	2020 EXTREMELY + VERY %	2018 EXTREMELY + VERY %	2018 RANK	SEGMENT
1	Communicate clearly in a way you can understand	63%	95%	95%	2	People
2	Listen to you	64%	94%	95%	1	People
3	Provide a clear plan of care and why they are doing it	55%	93%	93%	7	People
4	Ask questions and try to understand your needs and preferences	52%	93%	92%	8	People
5	Treat you with courtesy and respect	58%	92%	95%	3	People
6	A healthcare environment that is clean and comfortable	60%	92%	94%	6	Place
7	Give you confidence in their abilities	57%	92%	94%	4	People
8	Take your pain seriously	54%	92%	93%	5	People
9	A discharge/checkout process in which your treatment plan and/or next steps in care are clearly explained	46%	89%	92%	10	Process
10	An understandable and easy process for transitioning your health information between care providers (e.g., surgeon to primary care doctor, doctor to pharmacist, etc.)	45%	89%	90%	NR	Process

**Figure 6. Top 10 Items. When you think about having a good patient/family experience, how important are each of the following to you?**

"The population in general is getting more sophisticated in their healthcare engagement and are no longer engaging as passive passengers on a care journey. They are now, like in many other aspects of life, engaged participants in an interactive experience of care that, if done right and well, can lead to greater outcomes overall."

in care. This should end the debate on patients as partners and reinforce the need to build the processes and skills in all healthcare organizations to ensure this is a standard of good practice in every encounter.

This change in priorities, underlining the need to communicate, listen, be clear on care plans and clearly engage people as partners in their care, underscores a subtle but potentially significant change in consumer perspectives for healthcare. The population in general is getting more sophisticated in their healthcare engagement and are no longer engaging as passive passengers on a care journey. They are now, like in many other aspects of life, engaged participants in an interactive experience of care that, if done right and well, can lead to greater outcomes overall.

### **Consumers Continue to Stress Importance on Process Followed By Place**

While this paper will not delve into every individual item on the list, it is interesting to note that as in 2018, the items associated with "process" tend in mass to precede the importance of "place." Key reflections on the remaining data reveal a few points for consideration. (Figure 7)

In the next grouping of items from 11 to 20, the idea of partnership is reinforced in a number of ways, explicitly in the higher ranking of "being a partner/engaged in health decisions," and also reflected in the desire for clear information, the ability to ask questions in discharge processes, and scheduling and accessing information reasonably and easily. If you note the grouping of questions in this set of items, they are primarily about ease, convenience, personalization and compassion.

The final grouping brings us the majority of items associated with "place." Outside of the clear statement that people desire a clean and comfortable environment in the top ten, the last nine items from 21 to 29 are about the care environment itself. What is significant here is the drop-off

in scores. The breaking point around the item "a quiet and peaceful environment" occurs where the conversation on physical aspects of the healthcare setting, such as age of facility, food and amenities, are addressed. Of note is the final item where amenities are seen as only extremely and very important to one third of people, a significant drop from the almost 50% reporting this in 2018. Again, as was seen in 2018, this ranking does not suggest these items are not important, but rather are less critical to the way people perceive their experience than those related to how they are treated. It ultimately reinforces what people see as of greatest importance. People see how they are treated both clinically and personally as paramount to their care experience, and this must be a commitment of healthcare organizations looking to meet the needs of those they serve.

### **Implications for Action: Experience Excellence is More About Who Organizations Are**

In looking at the rankings, a key finding in 2018 was sustained again in this study that underlines an important opportunity for those working on experience. In comparing the items on the top of the list versus the bottom, we realize the top items require an investment in commitment to how an organization wants to engage. The lowest end of the rankings requires real dollar investments in physical items.

And while all the items studied have a level of importance to experience overall, the items that are of greatest significance to consumers are those that address how people behave. These are behaviors that can be set as expectations, skills that can be developed, and in doing so, priorities that can be met for those who engage in healthcare. The idea that efforts to achieve experience excellence require large investments and significant time may still be true for some, but the data suggests this cannot and must not be a reason for inaction, because the actions outlined as most significant require an investment of commitment and execution. It is a commitment every healthcare organization should be willing to make.



	ITEMS BY RANK	2020 % OVERALL EXTREMELY	2020 EXTREMELY + VERY %	2018 EXTREMELY + VERY %	SEGMENT
11	The ability to schedule an appointment or procedure within a reasonable time period	45%	88%	93%	Process
12	Partner with/engage you in making your health decisions	45%	87%	89%	People
13	A discharge/checkout process in which you are provided information (electronically or paper) on such items as medication, side effects, pain management, etc.	45%	86%	89%	Process
14	A discharge/checkout process in which you feel you can ask questions for clarification	42%	86%	90%	Process
15	A way to easily access your medical information or test results (e.g., open access to medical records, patient portal, etc.)	42%	85%	86%	Process
16	A waiting time to be seen that you feel is reasonable	40%	84%	90%	Process
17	A billing process that is clear, understandable, and respectful	45%	82%	89%	Process
18	Respond quickly when you ask for something	35%	82%	87%	People
19	The ability to schedule an appointment in a way that you prefer (e.g., using phone, online, app, etc.)	37%	79%	81%	Process
20	Express empathy and compassion	38%	78%	83%	People
21	Follow-up communication after an appointment, hospital stay, procedure, etc. (such as a call from a nurse or doctor) that is helpful, timely, and meets your expectations	35%	75%	81%	Process
22	A healthcare facility in which you can find your way around easily (e.g., clear signage, information, etc.)	29%	73%	79%	Place
23	A healthcare environment that is quiet and peaceful	29%	70%	80%	Place
24	Involve your family/care partners in planning how to take care of you	31%	68%	68%	People
25	A healthcare facility that is convenient to access (e.g., close to home/work or online)	28%	67%	77%	Place
26	A healthcare facility that offers convenient parking	24%	59%	71%	Place
27	A healthcare facility that offers good food	17%	44%	58%	Place
28	The age of a healthcare facility (i.e., feels newer or older)	12%	35%	52%	Place
29	A healthcare facility that provides amenities such as on-demand television, room service, etc.	13%	31%	49%	Place

**Figure 7. Ranked Items 11-29. When you think about having a good patient/family experience, how important are each of the following to you?**

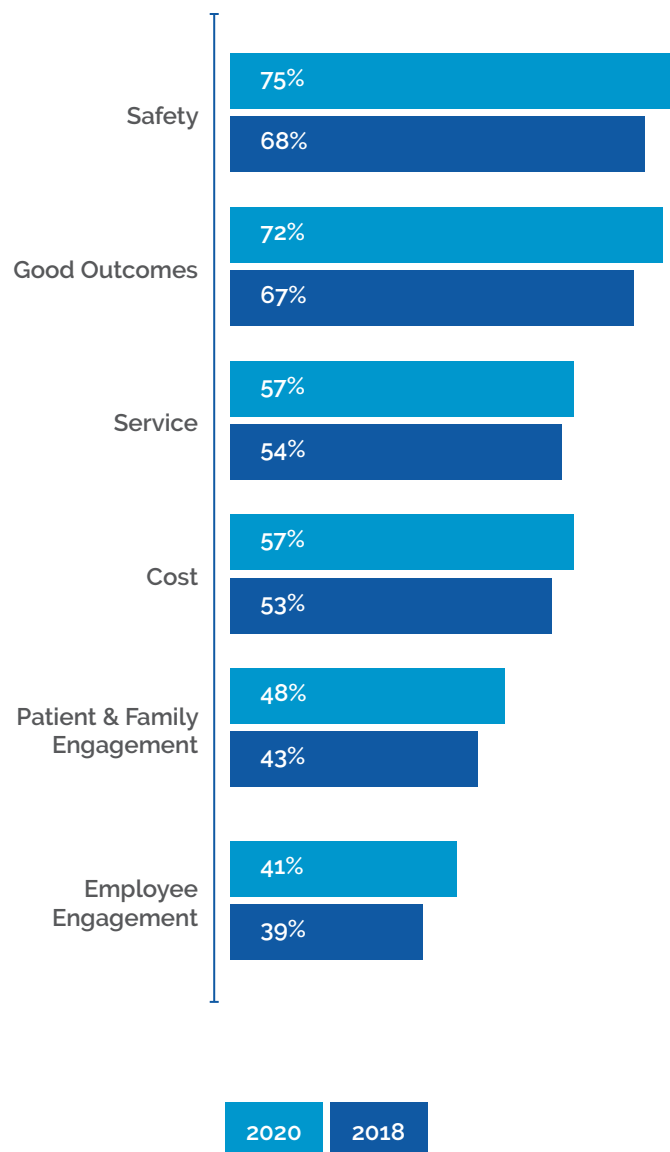
# Consumers See Experience as All They Encounter

This study again asked what elements people considered part of their healthcare experience. The findings reinforce a key point and theme found in the data overall. Consumers in healthcare see experience as encompassing all they encounter and the outcomes they achieve.


Quality, safety and service are clearly identified as components of the experience someone has in healthcare. This is an important distinction from the perspective that experience is part of quality. The reality in the data shows that as people evaluate and identify what is important to their healthcare encounter, they look to all elements in their experience. And, most critically, they still believe the quality of care they received and the safety of their care are tantamount to a positive experience overall.

This reinforces a key point reflected in the ranking data and a point requiring reinforcement here, that experience is not simply about amenities or satisfaction but rather is represented in the total of all that one encounters across all touchpoints on their healthcare journey. Much like the Experience Framework<sup>5</sup> reinforces the integrated set of strategic lenses required for a comprehensive focus on experience, respondents here too reflect an integrated view.

In answering the question, "To what extent do you think/believe patient experience includes each of the following?" (Figure 8), participants in this study sustained a perspective on this integrated view. With that, they again reinforced the importance of safety and outcomes as essential and see service and cost as integral as well; they too acknowledge the importance of both patient and employee engagement. Of greater note was the overall recognition that these elements are all seen as part of experience "to a great extent."



**Figure 8. To what extent do you think/believe patient experience includes each of the following? (% of respondents reporting to a great extent)**



“Experience efforts are not a distinct or tangential strategy to addressing issues of quality or safety, but rather experience should be seen as an encompassing strategy committed to addressing all elements of an encounter one has with a healthcare organization.”

In addition, we saw a strengthening of the integrated perspective of what is included in experience since we first asked this question in 2018. For every one of the six factors explored, each saw an increase in their rating over the last two years. This is particularly interesting, noting that while many of the individual items explored in the ratings of importance reflected in Figures 6 and 7 decreased slightly, every one of these factors increased in rating to how consumers saw them as part of experience overall. This highlights

the recognition of consumers of the broader and encompassing nature of experience and should be a point for healthcare organizations to consider as they work towards better integration of efforts. That is, experience efforts are not a distinct or tangential strategy to addressing issues of quality or safety, but rather experience should be seen as an encompassing strategy committed to addressing all elements of an encounter one has with a healthcare organization.

# Positive and Negative Experiences and their Implications for Healthcare Organizations

The inquiry into consumer perspectives also looked to identify how people described both positive and negative experiences. These insights reveal a more personal perspective of how people characterize the perceptions they have, and much like in 2018, the distinctions were clear. In sharing these reflections, both the word clouds from the 2018 inquiry and from this study are provided.

In response to the question, "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?" this is what was revealed. (Figures 9 and 10)

In looking at the words people used to describe a positive experience, there are strong consistencies over the period between studies with "caring" sitting solidly at the top of mind for consumers of care. The words that surround this central idea of caring also remain similar, as they touch on communication and compassion, listening and professionalism, kindness and understanding. This open-ended question reinforces much of what was revealed in the rated items above, that people want to be treated as people first, and what stands out for them in those positive moments are the care they are shown and the way they are engaged as people. A key to ensuring positive experience may very well be to focus on these simple and clear ideas and work to ensure they are executed consistently and flawlessly in every interaction.

Similarly, in looking to understand how people describe negative experiences, the words are telling as well and also consistent with the 2018 study. They reflect a very clear distinction from those ideas representing a positive encounter. In response to the question, "Think of a specific time when you or someone you know had a bad (or negative) patient experience. What words or



Figure 9. Descriptions of Positive Patient Experience 2018



Figure 10. Descriptions of Positive Patient Experience 2020





**Figure 11. Descriptions of Negative Patient Experience 2018**



**Figure 12. Descriptions of Negative Patient Experience 2020**

phrases would you use to describe this experience?" this is what was revealed. (Figures 11 and 12)

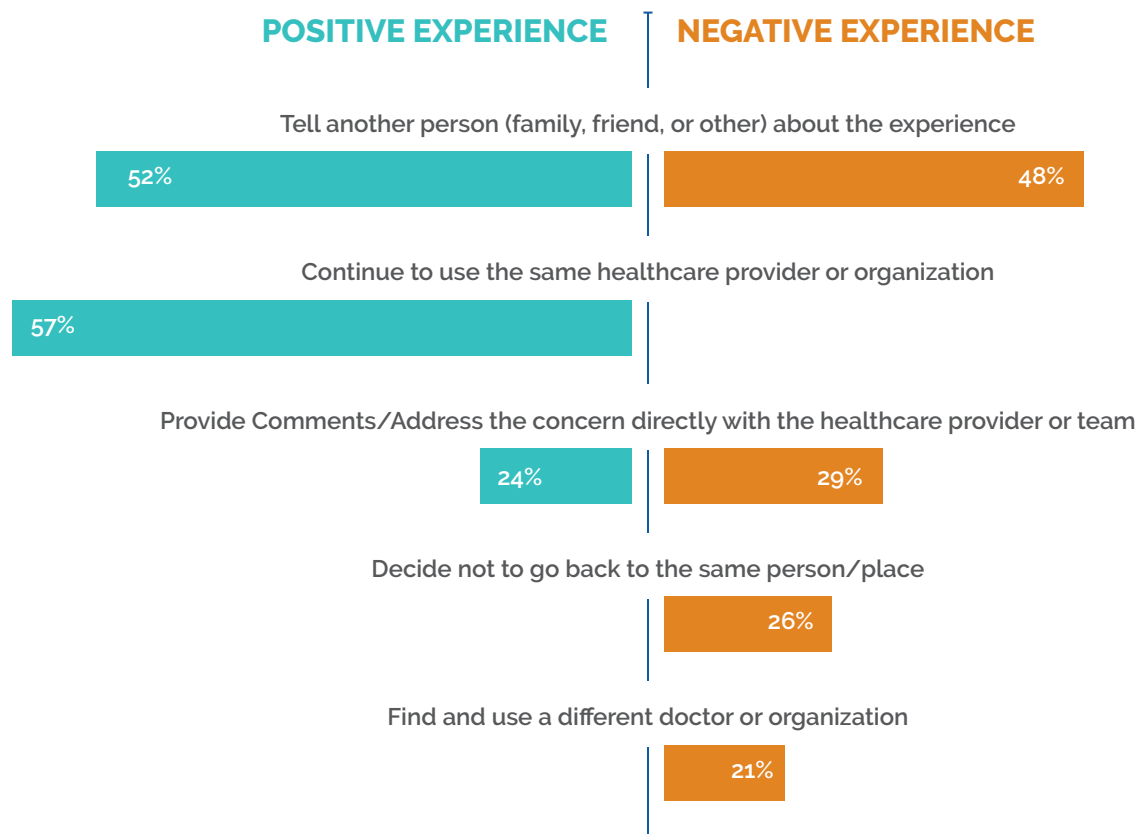
In the case of negative experience, the words that appear provide telling insights into what characterizes poor experience for those engaging in healthcare. Words such as "rude" and "rushed" dominate again with "waiting" and "long wait" still taking a prominent place in the input. Of interest from the rated items above is that the importance of wait times reduced by six points, while the issues of communication and taking the time needed for effective communication climbed the list. That shift appears here in the words of respondents as well.

What these specific questions show is that a clear picture of both a good and bad experience are relatively solidified in the general consumer mindset. They have shared now in both studies over a number of years that there are clear and unchanging elements people seek in a good experience and clear elements people identify consistently with bad experiences. The opportunity this

provides to build plans and processes to more effectively deliver positive elements and address the negatives are opportunities that organizations must not overlook. The implications of getting experience right are clearly shared by consumers in support of taking these actions.

In asking people what they did as a result of a positive or negative experience, the results from 2018 highlighted the powerful ripple effect experience has. In both instances – positive and negative experience – the top action respondents said they would take was to share their experience with others. Slightly higher for those with a positive experience was a commitment to continuing to use the same organization, an indicator of loyalty. So, whether good or bad, the experience a healthcare organization provides a patient, family and/or care partner becomes the story another person hears as they assess and even make choices around a healthcare organization or facility. This idea that stories are told and loyalty is reinforced by a positive experience remains evident and is further reinforced in this study. (Figure 13)

"As healthcare organizations look to reopen care for the communities they serve, the experience they provide may have no greater importance than in the days and months ahead to ensure viability in operations and ultimately fulfill their mission to care for others."



**Figure 13. As a result of your/others' experience, what actions did they take? (comparing positive and negative experiences)**

In reviewing the data in this study, the pattern from 2018 holds with just about half of all respondents who note whether they have a positive or negative experience say they will share their story with others. Again, showing the fact that an experience provided to one person or family extends well beyond that actual direct encounter. More so, for those who have a positive experience, it also reinforces a sense of loyalty to that provider or organization in almost two-thirds of encounters. Conversely, in negative experiences, about a quarter of respondents said they would make a change in physician or organization. Again, respondents reveal that poor experiences drive immediate decisions for consumers.

Of note in the data in this study compared to 2018 is that the numbers are slightly lower for all responses, which is found in almost all responses except for what people believe is included in experience overall. The thought is this reflects the uncertainty felt by people in general, specifically consumers of healthcare in a year where a pandemic took hold of society and enveloped the healthcare system. It has

had implications on how people choose to engage in healthcare and how willing they are to make changes versus to hold steady at a time of so much uncertainty.

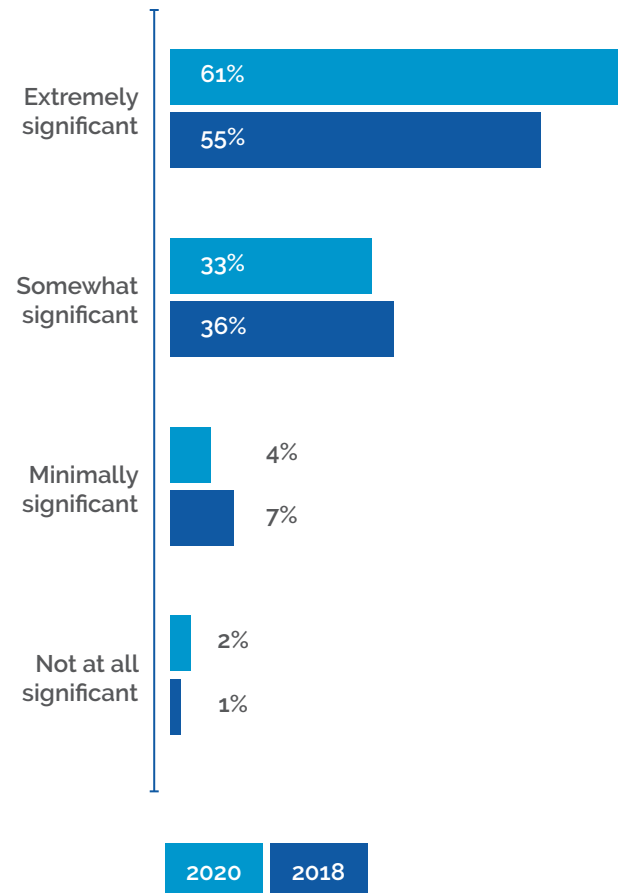
As seen in our recent PX Pulse studies,<sup>1</sup> consumers still had a level of fear and hesitation to seek care during the pandemic reinforcing an important reality for healthcare. A clear reconfirmation of a commitment to experience – a safe, quality, service-focused and personal experience – will be essential to reengaging people in healthcare as a result of the pandemic. These findings not only reflect a general sense of the moment but a reality that all healthcare organizations and systems will need to address to reassure patients and consumers in their choice to return. As healthcare organizations look to reopen care for the communities they serve, the experience they provide may have no greater importance than in the days and months ahead to ensure viability in operations and ultimately fulfill their mission to care for others.

# Experience Remains Significant in Healthcare Choices to over 90% of Consumers

This clear need to reaffirm a commitment to experience may be no more apparent than in asking how consumers will continue to make healthcare choices. In light of many of the numbers showing slight declines since 2018 reflecting the hesitancy caused by the pandemic, there is an unmistakable statement consumers make when it comes to how they will make healthcare choices.

The data in this study reveal that almost two-thirds of healthcare consumers say the experience they are provided will be “extremely significant” in the decisions they make about their personal healthcare. (Figure 14) This point alone reflects that experience is not something consumers of care take for granted; it is indeed something that drives their choice in where they seek care. This point also reaffirms the importance of the items that consumers believe encompass experience overall.

If healthcare organizations want people to choose them for care, especially in this moment of a health crisis, ensuring the actions that support a positive and strong experience are in place is a must. This is not just recognizing the integrated nature of the experience that is provided, but the very actions consumers say are of greatest importance to them, reinforcing they want to be listened to and engaged as partners, communicated to clearly, have clear plans of care and have confidence in a healthcare organizations' abilities.



**Figure 14. How significant is patient experience to your decisions about your healthcare or your family's healthcare?**

“Experience is not something consumers of care take for granted; it is indeed something that drives their choice in where they seek care.”

# Experience Remains a Global Conversation

As in 2018, this study looked to the responses in four other primarily English-speaking countries: Australia, Canada, Philippines and the United Kingdom. The hope for the future is that as the global dialogue on experience continues to expand, this inquiry will reach much further into efforts across various languages and in low-middle income countries as well. Of note is the consistency in the core responses and priorities among all responding nations. In fact, in comparing the top items rated across all countries studied, seven consistently appeared,

reinforcing the high importance placed on “listen to me” and “communicate in ways I can understand.” (Figure 15)

Of interest is that the differences may also reflect the type of health system in which people find themselves. This is also seen in responses to the question on the impact patient experience has on people’s healthcare decision-making discussed above. In reviewing findings across national respondents, you can see in systems of private and public/national healthcare structures that

	RAKING IN TOP ITEMS FOR EACH COUNTRY					
	SEGMENT	AUSTRALIA	CANADA	PHILIPPINES	UNITED KINGDOM	UNITED STATES
Listen to you	People	1	1	4	2	1
Communicate clearly in a way you can understand	People	2	2	3	1	2
A healthcare environment that is clean and comfortable	Place	6	3	1	4	3
Treat you with courtesy and respect	People	3	5	2	5	5
Give you confidence in their abilities	People	4	6	7	3	6
Provide a clear plan of care and why they are doing it	People	8	8	8	7	4
Ask questions and try to understand your needs and preferences	People	7	9	5	9	8

**Figure 15. Most important elements of experience across countries (noting numbers rank for each country)**



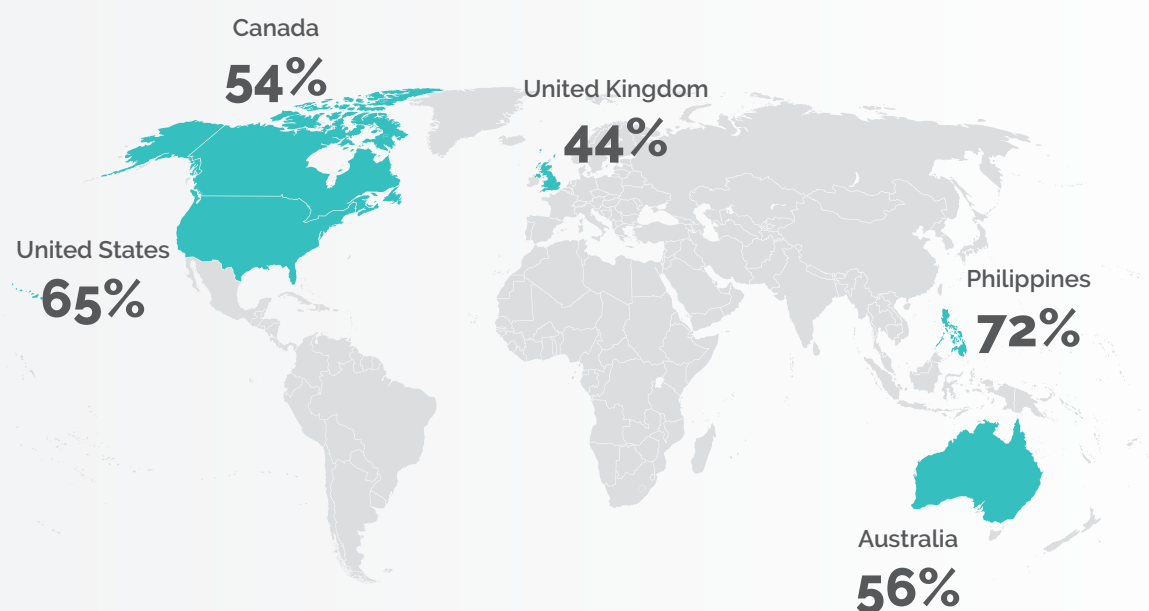
“No matter where one stands on the planet, they see themselves as a human being with hopes, needs and dreams. And these core ideas of how they want to be treated, communicated to, respected and understood hold true for everyone.”

experience is seen as more significant, such as in the United States or Philippines (which, as a nation, is working to expand universal coverage for its citizens). In more state or provincial-based national healthcare systems, such as Australia and Canada, where some choice is evident, the importance of experience is slightly less significant to decision-making. Finally, in a more defined national system, such as in the United Kingdom through the National Health Service (NHS), experience carries the lowest significance of all surveyed nations. (Figure 16)

The implications on decision-making are also clearly aligned with the amount of choice people feel they objectively have. This also reinforces a key point that no matter how people make decisions in healthcare, the fundamentals of what is important to them hold consistent and true. And when healthcare acknowledges, as it has, that the outcomes it provides,

i.e., the experience people have, matters above all else, ensuring these elements are in place is essential. (Note: While we will not dig deeper into the national comparisons in this paper, we hope to explore each region's insights in follow-up reports to come.)

What the data ultimately shows us is an immutable fact observed across many of the studies conducted over the past few years at The Beryl Institute, that no matter where one stands on the planet, they see themselves as a human being with hopes, needs and dreams. And these core ideas of how they want to be treated, communicated to, respected and understood hold true for everyone. Perhaps these are our universal truths in healthcare - truths now more evident than ever in the crisis through which everyone on the planet has been living.



**Figure 16. How significant is patient experience to your decisions about your healthcare or your family's healthcare? (% Extremely Important by country surveyed)**

# The Consumer has Spoken Again...and the Call to Action is Further Strengthened

**The 2018 report on consumer perspective closed with this point:**

*The consumers' perspective on patient experience offers not only validity to many of the core assumptions of the experience effort in healthcare, but also reveals a path for prioritizing action, ensuring focus and moving forward with intention.*

The findings shared in this follow-up exploration only further reinforce that point. The consumer has spoken again, and they are saying that experience matters in a meaningful and personal way. They too are saying that the experience they have will have an impact for many, if not most, on how they engage in healthcare now and into the future.

**As revealed here:**

**Patient experience is important overall.**

Consistently, over 90% of people surveyed say the experience they have matters to them.

**When thinking about experience, people focus on their health and well-being and fundamentally how they are treated.**

Healthcare organizations must acknowledge that people are looking at their greater health and well-being and included in that is how people in healthcare organizations engage with them as people in support of meeting that need.

**People expect good outcomes from healthcare and see these as the most important element of the experience they receive.**

As people seek care for their health and well-being, they see the outcomes they achieve as essential to the experience they are provided. Healthcare organizations run a great risk when they silo or separate outcomes as something separate from the experience they provide, for

in turning only to the data of outcomes, the humanness can be washed away. Consumers of care clearly expressed this is counter to what they want or expect.

**Above all else, the way in which people are treated far outweighs the processes of care or the place in which it is delivered.**

People continue to state that they want to be engaged in their care, listened to and communicated in ways they understand. Patients, their families, and/or care partners are not passive recipients or subjects of care "delivery," but rather active members of the care team and must be engaged to ensure the best experience overall.

**People identify caring, compassion and professionalism as hallmarks of a positive experience.**


Simply put, people want to be treated with the humanity they expect in every encounter and with the dignity and respect they too hope to show others.

**People identify the confluence of long waits with being rushed and rude interactions as indicators of a negative experience.**

In contrast to positive experiences, the paradox of having to wait only to be rushed and/or communicated to in a rude manner undercuts the good that healthcare can do. There will always be issues of time and unpredictability in healthcare, but how waits are managed through communication and making the most of valuable time must be a skill that healthcare organizations must master in providing the best in experience overall.

**The experience people have is a story they will tell others, whether good or bad.**

This may be clear in its own right, but it is critical to acknowledge that every encounter people have in a healthcare organization is a story people may share; each



“The world is growing smaller, and the access to information and insights on healthcare expand daily. Healthcare organizations that don't operate with this fact at top of mind are at risk of becoming more and more obsolete in the face of agile, focused and consumer-centric models of care.”

interaction is a page written that when combined tell the broader narrative of their healthcare journey. But any one of those pages could change the nature of the story itself and must be managed with care and understanding of what matters to those who seek care.

**The experience people have (or the ones they hear from others) will drive how they make decisions in healthcare overall.**

While there may be distinctions in how and why people make decisions in healthcare, it is evident that the experiences they have to a great extent will drive those decisions. And if healthcare organizations are ultimately in the business to provide care and help the health of their communities, they must have people choose them in order to do so. The world is growing smaller, and the access to information and insights on healthcare expand daily. Healthcare organizations that don't operate with this fact at top of mind are at risk of becoming more and more obsolete in the face of agile, focused and consumer-centric models of care.

In considering all that consumers shared in this study as they did in 2018, the consistency in their priorities even in the face of the current health crisis only further reinforces that consumers of care see themselves as humans first seeking human care. They expect to be treated as such, because they engage in healthcare for what may be the most important thing we hold as human beings – our health and well-being.

Additionally, the findings reinforce the core idea in the definition of patient experience itself and its opening words, that experience is “the sum of all interactions.”<sup>2</sup> These interactions with a healthcare organization happen well before a person may ever encounter them through the stories they hear, to well after they leave a healthcare encounter and become a storyteller themselves. And those words reflect truth to each and every person who speaks them and becomes the story through which people come to know healthcare organizations and providers around the world.

The call to action for healthcare organizations can be no clearer than what the consumer respondents shared here. They must take action to get the way in which they engage with people right. This is not simply about survey results or satisfaction scores, but about the way a health system commits to engaging every person who comes through their door, virtually or physically.

And in a time of global crisis where health systems and organizations, clinicians and staff have been at the center of so many conversations for what they have done in serving their fellow citizens in every part of the world, what remains evident, and may be more so now than ever, is the humanity the burns deep in the heart of healthcare. Challenging times call for heroic action, but so many who have answered that call acknowledge this is less about heroism and more about a commitment to a purpose that called so many to healthcare.

So too have those who experience care provided a clear call to action. They again reflected here that there is an unequivocal opportunity to do what is most important for all who seek healthcare, for their lives or those of loved ones and friends. When healthcare can listen and communicate clearly as it has so deftly in this moment in which we find ourselves, only great things can and will happen. This is not a nice to do, but a must always do, for the people who healthcare serves are asking, loud and clear, “Please hear us.” And when that happens, the outcomes all in healthcare seek to achieve will be realized, purposes will be fulfilled and lives will be lived fully.

That is what is being asked again here. These are not simply data points to challenge; this is a call to action to commitment. For when we meet people for who they are, where they are, only good can come of it. That is why healthcare will always remain the greatest inspiration for so many and the greatest hope for all. Now, we all must do as we've been asked, “listen to me,” and in doing so, only good things can and will come.

# Boundless Appreciation

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Our hearts and hopes are with you all at this challenging time. We honor all who have given so much for so many. We send sympathies for those who have lost. We share hope, for in all that was shared here and all we see in the light on the horizon, it has been the work of those committed to the very ideas shared in this study who have made that all possible. Thank you for all you have done for your fellow citizens around the world. You are truly the human experience, and we are forever grateful.



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EXECUTIVE BRIEF • 5-6 MIN

# Consumer Perspectives on Patient Experience 2021

Jason A. Wolf, PhD, CPXP

## Introduction to the Survey & Report

A follow-up to The Beryl Institute's 2018 study, [Consumer Perspectives on Patient Experience 2021](#) reveals the qualities healthcare consumers look for in a healthcare experience remains much the same, even during a global pandemic. The data also provides a clear call to action. In order for healthcare providers to remain viable and competitive long-term, they must reinforce their efforts to deliver an exceptional experience and focus on being genuinely patient/consumer-centered.

"Experience is not something consumers take for granted; it is indeed something that drives their choice in where they seek care."

While patients' overall healthcare preferences have remained mostly consistent, the impact of COVID-19 is causing us to rethink every aspect of healthcare delivery, sparking a rapid rise in stress in the healthcare workforce and exposing broader systemic issues of disparities and racism. The message is clear: We must do better at listening, communicating and partnering with patients and their loved ones—and with our healthcare workforce—if we want to ensure our success. This is not a nice-to-do; this is something we must do, as it is essential to achieving improved experience, quality outcomes, brand loyalty and a stronger bottom line in an increasingly competitive industry.

## 2021 REPORT DATA BACKGROUND & DEMOGRAPHICS SNAPSHOT

2000  
participants



50%  
from the United States



50%  
from Canada, Australia, the UK  
or the Philippines

51%  
female



49%  
male



# Key Takeaways from the 2021 Report

- 1 Experience is important to consumers and it should be a priority for all providers.** Over 95% say having a good experience is "very important" or "extremely important," making this an essential strategic priority.
- 2 Impact on personal health and well-being and a desire for good outcomes are the leading reasons consumers believe a good patient experience is important.** More than 95% of consumers see their healthcare experience as grounded in a focus on their health outcomes and overall well-being.
- 3 Consumers want to be seen as humans first.** Nine out of ten consumers place great importance on being listened to and communicated with in a way they can understand, and they gauge the quality of their experiences based on those practices.
- 4 Consumers have a wholistic view of experience that has implications for how providers approach experience improvement.** Consumers see experience as encompassing safety, quality, outcomes, service, engagement, cost and the actions of the care team itself. To improve consumer perception of experience requires collaboration and coordination across the entire care continuum.
- 5 Consumers are placing significantly less importance on the physical place in which they receive care.** While the environment is important in any care experience, it is clear in the current pandemic people are placing much less significance on the physical space in which they receive care, consistent with the increasing acceptance of virtual health visits and new ways of receiving care by patients and care partners.

## SELECT CONSUMERS INSIGHTS

- 75%** of consumers see safety as an important part of experience (Up 7 pts from 2018)
- 50%** of consumers will tell family, friends or others about their experience, whether good or bad
- 61%** of consumers see experience as extremely significant to the healthcare decisions they make now & in the future (Up 6 pts from 2018)
- 26%** of consumers who have a negative experience will not go back

## TOP 10 ELEMENTS CONSUMERS VIEW AS IMPORTANT TO A GOOD EXPERIENCE

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

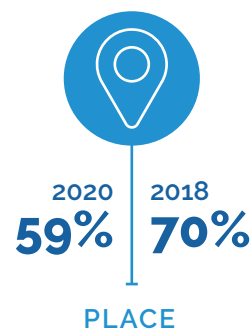
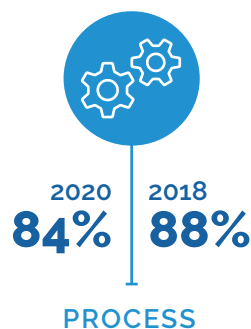
*(Extremely + Very Important)*

Experience Elements	2018	2020
Communicate clearly in a way you can understand	95%	95%
Listen to you	95%	94%
Provide a clear plan of care and why they are doing it	93%	93%
Ask questions and try to understand your needs and preferences	92%	93%
Treat you with courtesy and respect	95%	92%
A healthcare environment that is clean and comfortable	94%	92%
Give you confidence in their abilities	94%	92%
Take your pain seriously	93%	92%
A discharge/checkout process in which your treatment plan and/or next steps in care are clearly explained	92%	89%
An understandable and easy process for transitioning your health information between care providers (e.g., surgeon to primary care doctor, doctor to pharmacist, etc.)	90%	89%

## PEOPLE-RELATED EXPERIENCE ELEMENTS ARE OF GREATEST IMPORTANCE TO CONSUMERS

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

(Extremely + Very Important)



## Strategic Considerations for Healthcare Provider Organizations

To seize on the opportunity, providers should consider the following:

- **Build processes to ensure consumers feel listened to and communicated with effectively.** Seek to understand what truly matters to the consumer and act on the priorities they identify.
- **Commit to and ensure an integrated approach to experience.** Acknowledge and reinforce that quality, safety and service efforts are not distinct efforts. Collaboration and coordination are essential to success.
- **Equip and empower everyone in your organization to deliver a consistently exceptional experience.** Establish clear expectations for how employees and providers will engage, partner and communicate with patients and families and one another—and then arm them with skills and/or training they need.
- **Remember that the continuum of care expands far beyond facility walls.** Providers should offer a smooth, cohesive and well-coordinated path for consumers as they access and navigate virtual and physical care touchpoints.
- **Connect experience to outcomes, brand loyalty and the bottom line.** Ensure employees and providers understand that experience influences patient perception, which influences retention and how patients talk about your organization in the community, which influences your reputation—which ultimately influences the healthcare decisions people in your community will make, including where they receive care.

"The population in general is getting more sophisticated in their healthcare engagement and are no longer passive passengers on a care journey. They are now, like in many other aspects of life, engaged participants in an interactive experience of care that, if done well, can lead to greater outcomes overall."

**Download the full 2021 Consumer Perspectives Report**



## ARE YOU LOOKING TO IMPROVE EXPERIENCE AT YOUR ORGANIZATION?

The Beryl Institute is a global community of over 55,000 healthcare professionals and experience champions committed to transforming the human experience in healthcare. As a pioneer and leader of the experience movement and patient experience profession for more than a decade, the Institute offers unparalleled access to unbiased research and proven practices, networking and professional development opportunities and a safe, neutral space to exchange ideas and learn from others.

### ADDITIONAL RESOURCES RELATED TO THE 2021 CONSUMER PERSPECTIVES REPORT

<i>A Global Inquiry on Excellence in the Diagnostic Journey: The Power of Human Experience in Healthcare</i>	10 MIN
<i>To Care is Human: The Factors Influencing Human Experience in Healthcare Today</i>	15 MIN
<i>Human Experience 2030: A Vision for the Future of Healthcare</i>	15 MIN
<i>PX Pulse – Quarterly Tracking Survey</i>	5 MIN

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