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

January 2020

THE BERYL INSTITUTE

Ipsos

The Beryl Institute is the global community of practice committed to elevating the human experience in healthcare. We believe human experience is grounded in experiences of patients & families, those who work in healthcare and the communities they serve.

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

You can follow The Beryl Institute on LinkedIn, Facebook and Twitter (@BerylInstitute).Visit The Beryl Institute website at www.theberylinstitute.org.

Ipsos is the third largest social science and market research firm in the world, with offices in 89 countries and over 18,000 employees who are passionately curious about people, markets, brands, and society. We have more than 30 years of experience working with physicians, hospitals, payers, brokers, and healthcare organizations on improving healthcare quality, increasing accountability, and advising on new and emerging health policy issues.

For more information on Ipsos' patient experience and healthcare contributions, you can follow Ipsos Public Affairs on LinkedIn and Twitter (@IpsosPA).

INTRODUCTION

A NEW WAY TO TRACK CONSUMER PERSPECTIVES ON PATIENT EXPERIENCE

Improving patient experience has become an increasing priority for healthcare leaders in the United States. Patient experience metrics are now built into performance-based reimbursement, board certification and licensing, and practice-recognition programs. Underlying these and other policy changes is the acknowledgement that healthcare consumers and their families should be at the center of the way care is provided. Moreover, past research has shown that consumers themselves reinforce the importance of patient experience in their healthcare interactions. A positive care experience is also found to be associated with a wide-range of health outcomes—both self-reported and objectively measured, all of which indicates that patient experience matters, and it will continue to be a core element in the discourse about improving healthcare delivery.

This growing emphasis on patient experience is a key facet of the continuous discussions and actions taken to improve the U.S. healthcare system. The proliferation of innovative payment and delivery models, the emergence of disruptive technologies changing how we interact with providers, and the prominence of healthcare political debate and legislative activity have created conditions where the care experience of consumers is continuously evolving. With this context, it is important to carefully track the implications of these changes on all aspects of a consumer's experience.

In response to this need, The Beryl Institute and Ipsos set out on a partnership to regularly capture healthcare consumer perspectives of patient experience in the United States. **The Beryl Institute – Ipsos PX Pulse** represents a first-of-its-kind effort to elevate understanding of the current perspectives on patient experience in U.S. healthcare, determine the practices and processes that have the greatest impact and influence on healthcare consumers, and track how the market sees patient experience evolving over time.

Built into this partnership is a continuation of The Beryl Institute's efforts to expand the conversation around patient experience into one that represents the integrated nature of a healthcare encounter—the sum of all interactions—encompassing all that occurs across the continuum of care, across touchpoints and transitions, in quality, safety, and service efforts, and in its implications on cost and the issue of access. With the help of Ipsos, who brings over 30 years of experience capturing and understanding patient experience sentiments for different actors across the healthcare industry, The Beryl Institute – Ipsos PX Pulse will provide new insights on the experience of consumers across various health settings and specific aspects of a health encounter.

The Beryl Institute – Ipsos PX Pulse will provide a common language by which to discuss the evolving nature of patient experience in the United States. This inaugural publication highlights what will be a quarterly report sharing experience trends and providing new insights for the healthcare industry.

ROADMAP

NEW INSIGHTS DELIVERED QUARTERLY

The Beryl Institute – Ipsos PX Pulse effort will publish findings quarterly, sharing new insights from consumers about healthcare that will further elevate the conversations around patient experience.

The survey will ask five core questions that will track consumer perspectives on patient experience and healthcare overall.

PX Pulse will help ensure that as the conversation on human experience in healthcare continues to expand, a focus on the needs of the consumer remains central to the evolving healthcare system.

In addition, each quarter will feature a deep dive into consumer experiences within specific health settings, including primary care, hospital care, emergency and urgent care, as well as post-visit care. Consumers will also be asked about specific dimensions of care, including access, cost, and use of telemedicine.

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

Core Questions Asked Each Quarter

1. Thinking about the healthcare system in America as a whole, overall, how would you rate the quality of healthcare in this country?
2. From the following list, which healthcare issue is most important to you?
3. Thinking about how you have experienced healthcare in the past year, how would you rate your overall experience?
4. Overall, how important is it that you have a good patient experience?
5. Why is having a good patient experience important to you?

Release Month:	January Public Release	April Public Release	July Public Release	October Public Release
Healthcare Setting-specific Questions	Primary Care	Acute Care / Hospital	Emergency Room / Urgent Care	Following Guidance about At-home / Post-visit Care
Domain-specific Questions	Access & Cost Provider Communication	Factors Influencing Hospital Use Telemedicine Practices	Scope of Consumer Practices Telemedicine Portals	Framing Patient Experience

METHODOLOGY

This research was conducted using online surveys fielded through the Ipsos KnowledgePanel®, one of the only probability-based online panels that is representative of the U.S. population. The KnowledgePanel was chosen to provide one of the highest levels of accuracy and representativeness available on the web, allowing for the accurate measurement of consumer experiences, opinions, and behaviors in the United States.

In total, 1,048 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded to a sample group of people that were randomly selected to be representative of the U.S. population in terms of Census estimates of gender, age, race, ethnicity, education, income, and region. The survey was fielded in English only. Findings presented in this report were weighted to correct for any over- or underrepresentation in the distribution of completed surveys across these demographic categories.

CORE FINDINGS

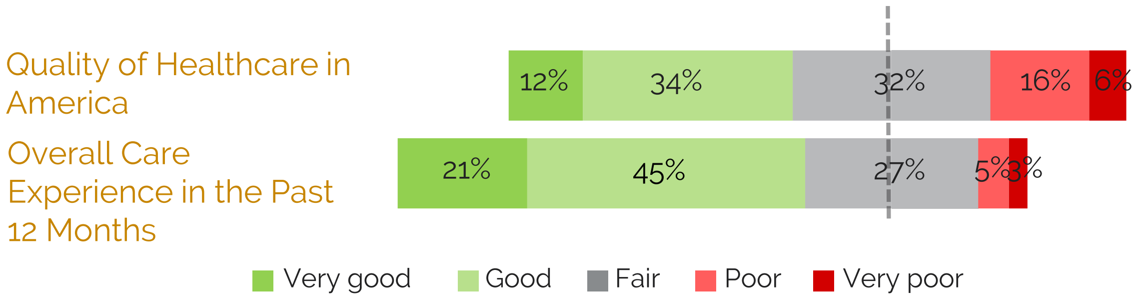
CONSUMERS ARE MORE POSITIVE ABOUT THEIR OWN CARE EXPERIENCES THAN ABOUT OVERALL HEALTHCARE QUALITY

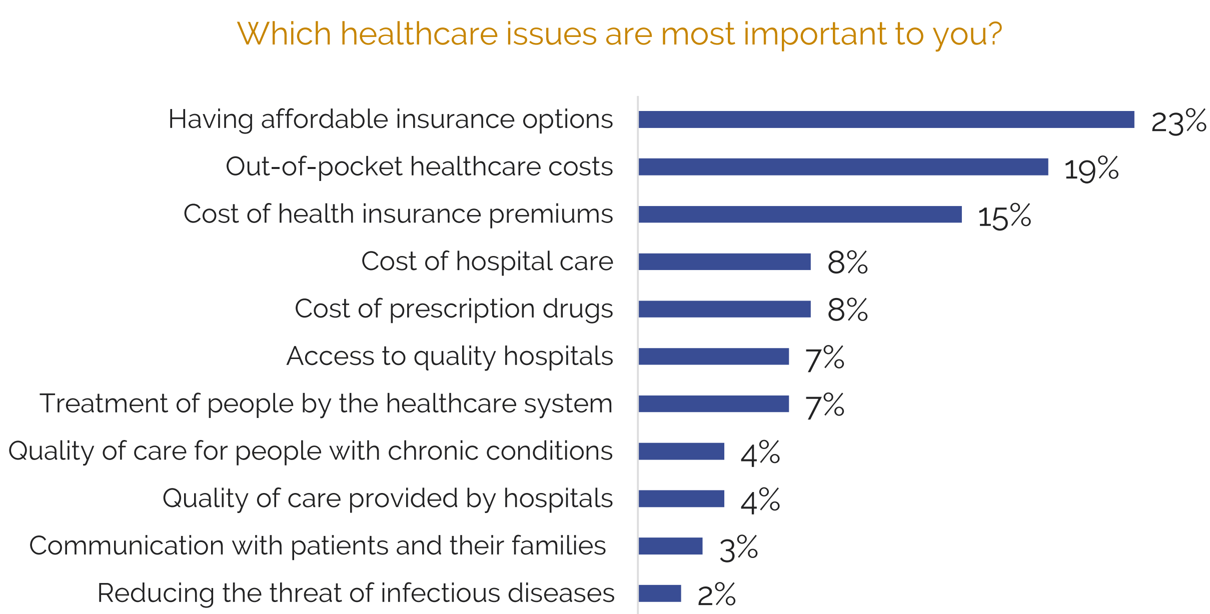
In comparison to people's assessments on the overall quality of care in the United States, consumers are highly positive about their own personal experiences in a healthcare setting within the last 12 months. On a five-point response scale of very poor to very good, 66% of people report a good / very good personal experience, while only 46% of people report a good / very good perception of quality. These initial questions provide a baseline assessment of general attitudes towards experiences in the United States healthcare system.

COST WAS THE MOST IMPORTANT HEALTHCARE ISSUE FOR CONSUMERS

Breaking down the issues people care about most in healthcare, we see a large share of respondents address issues of cost. About 73% of people prioritize issues of cost, whether it be costs pertaining to insurance coverage, prescription drugs, hospital care, or other out-of-pocket healthcare costs.

Quality-related issues, such as access to quality hospitals, quality of care, and how people are treated by the healthcare system are also cited as important healthcare issues.





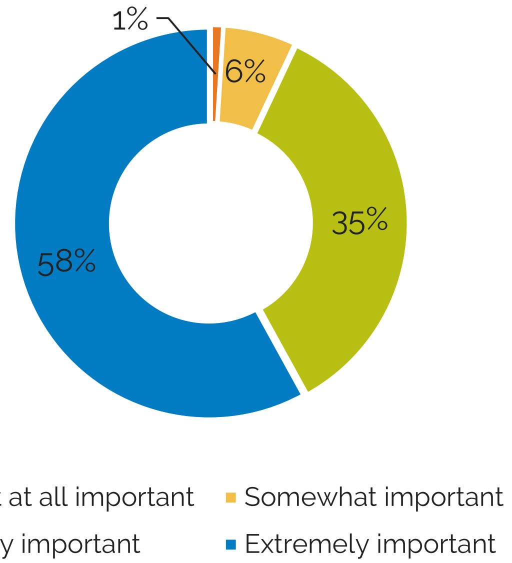
CONSUMERS SAY THAT PATIENT EXPERIENCE MATTERS TO THEM

Even though affordability and cost of healthcare are top-of-mind as important issues, healthcare consumers also say that having a good experience is important to them as patients. Compared to the 73% of people who stated some aspect of cost is important to them in healthcare, **over 90% of people affirm that good patient experience is either very important or extremely important.**

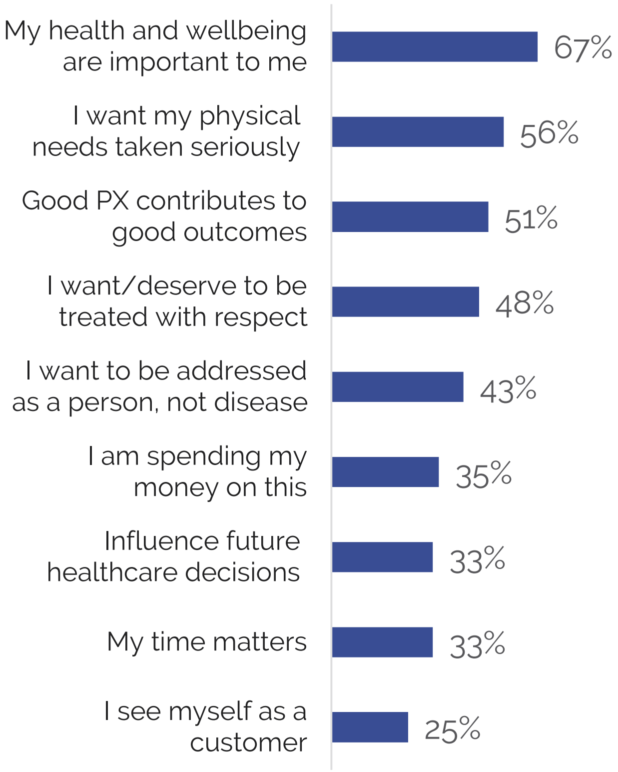
A few of the top reasons stated for why good patient experience is important to consumers include their health being important to them, knowing that their physical needs are being taken seriously, and believing that good patient experience contributes to good healthcare outcomes.

These views reflect a growing body of academic research that consistently indicate patient experience is positively associated with a wide range of important clinical care outcomes. These associations can be found across a wide range of disease areas, settings, outcome measures, and study designs. Additionally, patient experience matters as an end in itself. At the human level, the findings also reflect consumers' desire to be treated with respect and as a person—in line with the overall mission of healthcare.

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



Why is having a good patient experience important to you?



Experience influences expectations, which influence behavior, which further influences experience.

PRIMARY CARE VISITS

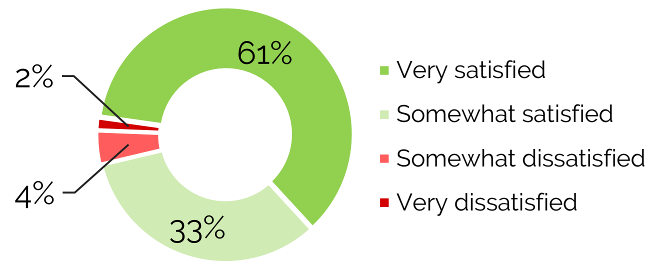
CONSUMERS ARE HIGHLY POSITIVE ABOUT THEIR PRIMARY CARE EXPERIENCES

Over 90% of consumers who have had a primary care visit in the past three months report being satisfied with their primary care experiences and felt that their needs related to those visits were addressed. If their needs weren't met, consumers largely report looking up information online (30%) or waiting to see if they felt better (25%).

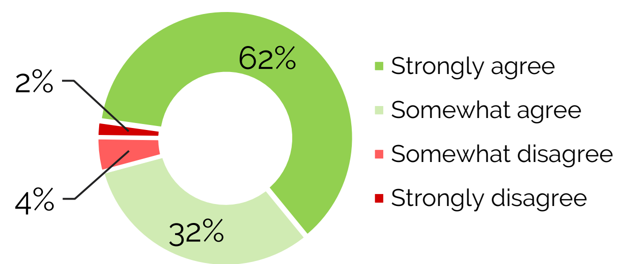
The most common reasons for visiting a primary care provider included going for their annual physical (48%), returning for follow-up appointments (38%), annual wellness visits (25%), regular visits for chronic conditions (21%), and visits for labs/procedures (20%).

Why did you pick your primary care provider?

How satisfied were you with the visit(s)?



My primary care provider addressed all my needs related to my appointment.



ALONG WITH CONVENIENCE AND AVAILABILITY, THE FRIENDLINESS/RESPECTFULNESS OF STAFF ARE AMONG TOP REASONS CITED FOR CHOOSING A PRIMARY CARE PROVIDER

The top reason consumers choose their specific primary care providers is the proximity of their offices to home, work, or school (37%), followed by their inclusion in an insurance company list of eligible providers (32%).

Friendliness and respectfulness of both providers (30%) and staff (24%) are also important factors in choosing primary care providers, underscoring the importance of consumer interactions.

Reviews, ratings, and awards had a comparatively lower impact on choosing a primary care provider.

ACCESS & COST

SOME CONSUMERS CITE ACCESS AND COST CHALLENGES TO GETTING CARE

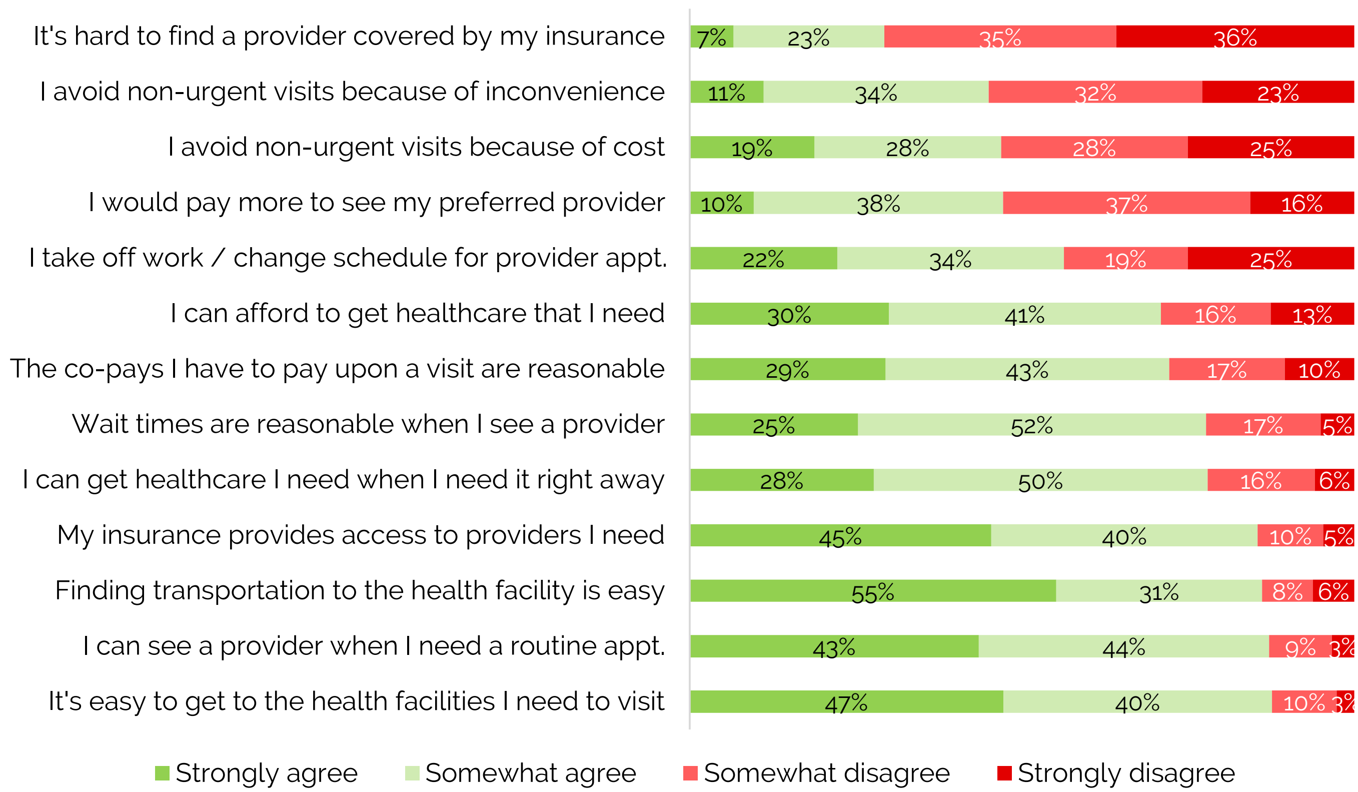
In terms of cost and affordability, consumers strongly agree or agree that the co-pays they pay are reasonable (72%) and that they can afford to get the healthcare they need (71%). A sizeable portion, however, also indicate that they avoid non-urgent care visits due to costs (47%), suggesting challenges among certain consumer types in getting needed care and concerns with unstated costs.

About 85% of consumers agree that their insurance provides access to the providers they need to see, though 30% say that it is hard to find a provider covered by their insurance.

In terms of access, consumers felt that it was easy to get to the healthcare facilities they need to visit (87%), and that finding transportation to reach the facility was easy (86%). Similarly, consumers were able to see a provider when needed for a routine appointment (87%), get healthcare when they need it right away (78%), and had reasonable wait times when visiting the provider (77%).

Despite consumer experiences with access being reported as generally positive, a sizeable proportion indicate that they avoid non-urgent care visits because of inconvenience (47%). This suggests that consumers may experience access challenges that prevent them from addressing all their heath needs in a timely manner.

Please indicate how much you agree or disagree with the following statements:



COMMUNICATION

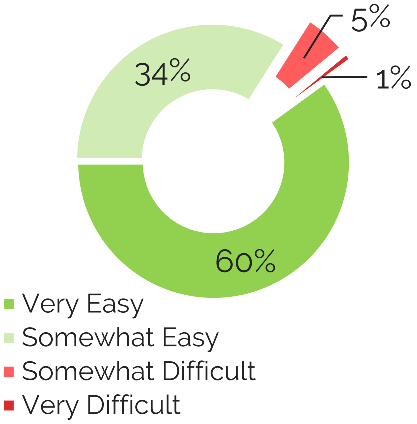
CONSUMERS FIND IT EASY TO UNDERSTAND AND COMMUNICATE WITH PROVIDERS

Good communication skills and a positive patient experience go hand-in-hand. Various studies have highlighted the importance of provider communication and interpersonal relationships in improving overall care experience.

The vast majority of consumers find it easy to understand what their healthcare providers are saying (94%) and are comfortable discussing personal health issues with them (91%).

Consumers who did not find it easy to communicate with providers asked that they use more layman's terms instead of medical jargon, appear less rushed, listen to their issues more closely, and clearly explain different treatment options and disease causes.

When you go to a healthcare provider, how easy or difficult is it to understand what they are saying?



6% of people found it difficult to understand what the healthcare provider was saying

What healthcare providers could have been done better, as told by the consumers:

"Ask if I'd like to take notes and allow me time to write down what they are saying"

"Stop using words that only people in the medical field use"

"Spend more time explaining why"

How comfortable do you feel talking to your doctor about health issues?

6% of people were uncomfortable discussing health issues with a healthcare provider

What healthcare providers could have been done better, as told by the consumers:

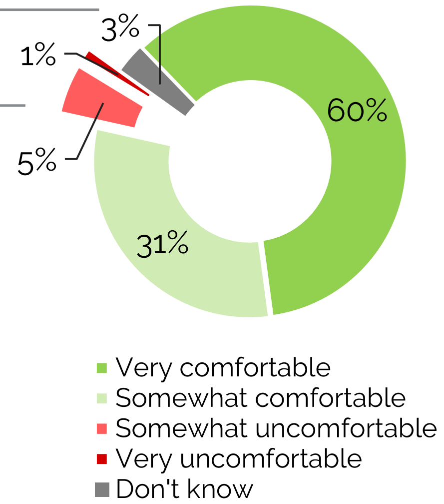
"Treat me like a human and listen to my issues"

"Not appear rushed or uninterested"

"Explain different options and causes"

"Treat me like a person"

"Be more open"



IMPACT OF PATIENT EXPERIENCE

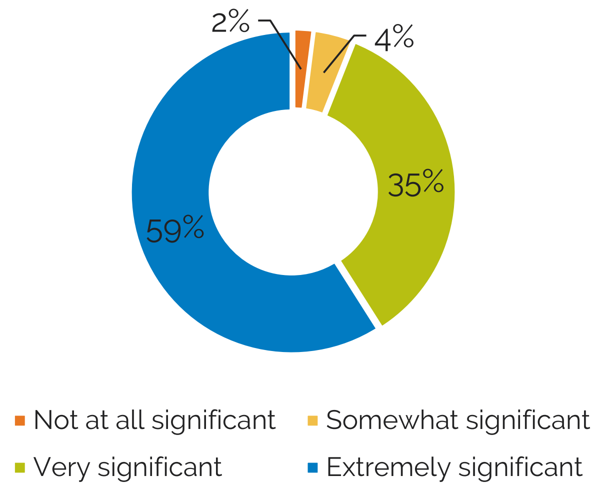
PATIENT EXPERIENCE IS SIGNIFICANT IN CONSUMER HEALTHCARE DECISIONS

The vast majority (94%) of consumers indicate that patient experience is significant to decisions about their own or their family's healthcare—reinforcing the importance of promoting a positive patient experience.

Overall, consumers also report having more positive experiences (70%) than negative experiences (12%), which is consistent with the findings reported in The Beryl Institute's 2018 Consumer Perspectives on Patient Experience Report.

In terms of impact, consumers with positive experiences are likely to continue to use the same healthcare provider / organization and tell others about their experience. Consumers with negative experiences are likely to tell others such as providers, health organizations, friends, family, and through larger social media / review channels.

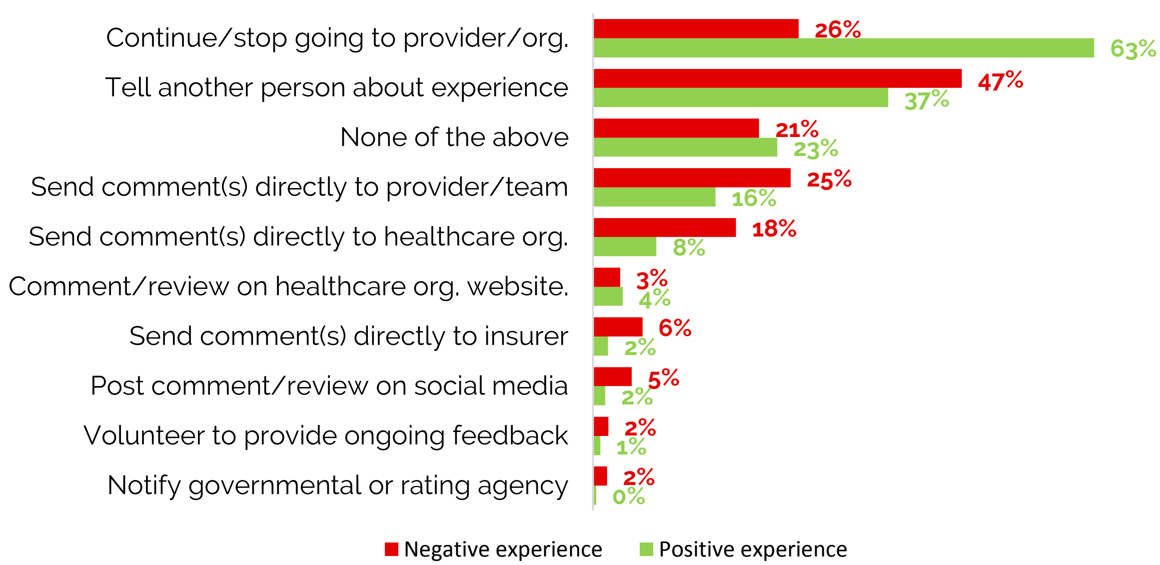
How significant is patient experience to your decisions about your healthcare or your family's healthcare?



70% of consumers said they had a positive experience in the past 12 months

12% of consumers said they had a negative experience in the past 12 months

Did you do any of the following as a result of your positive or negative experience?



TAKEAWAYS

The Beryl Institute - Ipsos PX Pulse will help put consumer voices and the human experience at the forefront of healthcare improvement discussions. This inaugural publication furthers this aim by sharing key consumer insights with the healthcare industry:

- Consumers are more positive about their own care experiences (66%) than about overall healthcare quality (46%).
- Cost is the most important healthcare issue for consumers, with 73% prioritizing some cost-related issue like insurance coverage or drug prices.
- Over 90% of consumers say that patient experience is either very important or extremely important.
- Consumers are highly positive about their primary care experiences, with over 90% reporting being satisfied with their visits and having their care needs met.
- Some consumers cite access and cost challenges to getting care, with 47% saying they avoid non-urgent visits due to costs and inconvenience.
- Over 90% of consumers find it easy to understand and communicate with their providers.
- Patient experience is a significant factor (94%) in consumer healthcare decisions.
- Consumers have had more positive care experiences within the past 12 months (70%) than negative care experiences (12%).

A LOOK AHEAD AT THE INSIGHTS TO COME

The Beryl Institute - Ipsos PX Pulse will continue releasing quarterly reports to further elevate the conversation around patient experience.

The next quarter's release will include a deep dive into the consumer experience with acute hospital care. This includes asking consumers about their satisfaction with the overall experience, how easy it was to understand acute care providers, and how respectful acute care providers were during their stay, among other topics. In addition, consumers will be asked about the factors that influence their decisions to use certain hospitals, as well as their own experiences with telemedicine providers.

PX Pulse will also continue asking its five core questions each quarter, developing a national barometer for consumer care experiences that can be trended and measured against larger changes in the healthcare delivery landscape. As healthcare continues to evolve, PX Pulse will provide healthcare stakeholders with dependable, representative insights on how consumers experience those changes and how the changes impact their ability to receive care.

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