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

JUNE 2022

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The Beryl Institute is a global community of 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.

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

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INTRODUCTION

As we release our ninth issue of The Beryl Institute – Ipsos PX Pulse, we continue our exploration of consumer perspectives of experience in the United States (U.S.) healthcare system. While we started PX Pulse prior to the arrival of the COVID-19 pandemic to the U.S., the insights gained over the last two years have provided us a unique view into how the pandemic itself has impacted people's perspectives of healthcare.

We have seen that many of the fundamentals we have raised from well before the pandemic started remain true today: people are focused on their health and well-being; the experience they have is very important to them; and they see cost and access as critical levers in their care experience. This release reinforces those ideas and now shows us trends over 27 months of how perceptions have shifted. As we have traversed the pandemic, we also have been able to explore the impact it has had on people's choices and comfort as we reengage them in care.

This release helps us continue that inquiry in brief form as we look at the trends of the core questions shared below and continue to explore the impact of COVID-19 itself. While trending reports may not always show significant changes period to period, it is in the subtle movements and the consistent directional trends from which we can be informed and of which we should be aware. This issue offers these very insights, as perceptions of quality remain relatively low while the importance of experience remains high. While comfort in seeking care slowly returns, the factors that drive experience are further established.

One thing PX Pulse has helped reinforce is the very integrated nature of experience itself. This perspective is underlined by the voices of the U.S. Healthcare Consumers themselves. There are many levers that drive the best in experience; it is not only interpersonal but driven by the processes and systems that frame the healthcare system and influence its actions every day. This release of PX Pulse and the now over-two-years of trending data show us that we must not overlook this broad perspective. A focus on experience is critical. A commitment to act on experience is essential. The U.S. Consumer has let us know this to be true. It is imperative we continue to listen and act.

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, 1,010 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from April 20, 2022 to May 2, 2022 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.

PX Pulse 2022 releases present the findings in a pattern of shorter core inquiries and deeper-dive sets of questions in alternating quarters. This quarter's inquiry focused on the core questions with a follow-up inquiry on the impact of COVID-19 on consumer perspective.

The core question set includes the following:

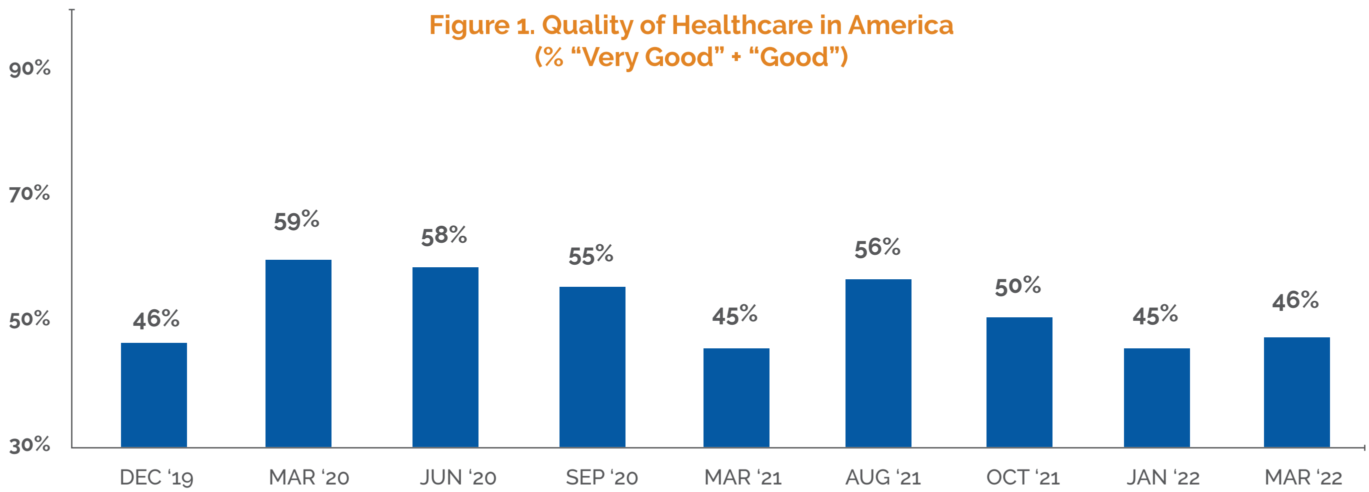
1	Thinking about the healthcare system in America as a whole, overall, how would you rate the quality of healthcare in this country?
2	From the following list, which healthcare issue is most important to you?
3	Thinking about how you have experienced healthcare in the past year, how would you rate your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

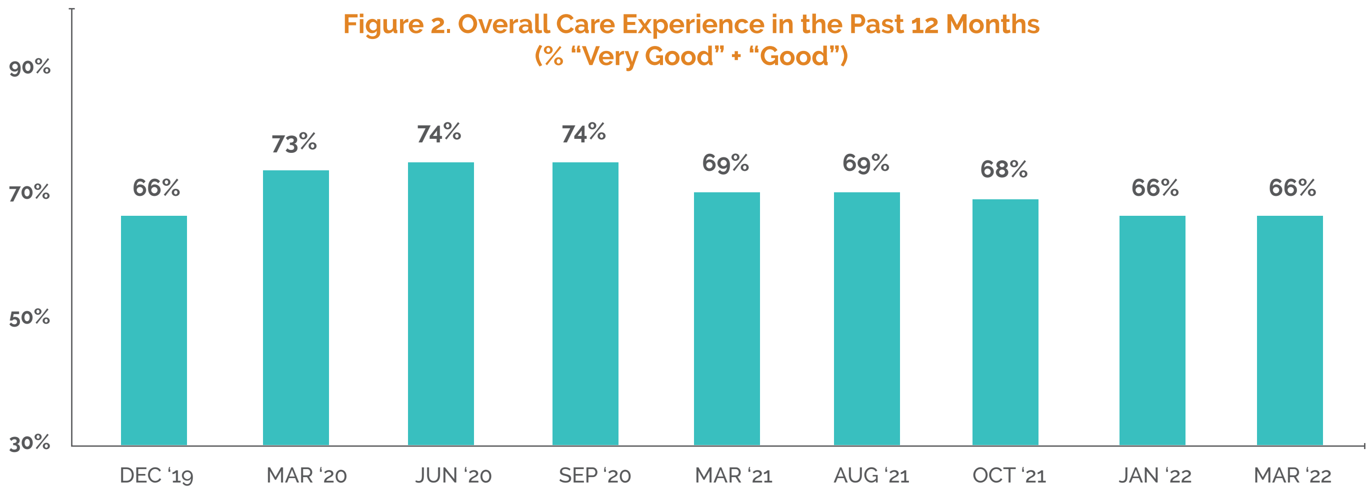
CORE FINDINGS

CONSUMER'S PERCEPTION OF CARE HOLDS STEADY AND RETURNS TO PRE-PANDEMIC LEVELS

Consumer perception of the quality of healthcare in America remains low at 46% as we move into 2022, with only a slight uptick from January 2022. This result reflects that the perception of quality is now returning to pre-pandemic levels. (Figure 1)

While quality numbers saw a couple jumps over the last two years which were interestingly aligned with surges in the COVID-19 pandemic, people's reflection on care experience saw a similar jump in early 2020 and has also returned to a more steady-state with just over two-thirds (66%) of respondents reflecting their experience is "very good" or "good." (Figure 2) These findings also are seemingly returning to pre-pandemic numbers, and we suspect people have returned to seeing healthcare through a pre-pandemic lens as they begin to see that we will be living with COVID-19 to some extent as part of our lives moving forward.





IMPORTANCE OF HEALTHCARE COST AND INSURANCE ACCESS REMAINS OF PRIMARY IMPORTANCE TO CONSUMERS

Affordability and costs continue to be the most important healthcare issues. "Having affordable insurance options," remains the most important issue and saw an increase of 5 percentage points since January. (Figure 3)

In asking consumers what top three healthcare issues are most important to them, they too have remained the same but shifted in ranking since last period. "Out-of-pocket healthcare costs" has returned to the top spot and increased 4 percentage points. "Cost of health insurance premiums" remained in the second spot but saw a slight decrease, while "Having affordable insurance options" moved to the third spot dropping seven percentage points overall. (Figure 4)

The consistency with which these top items continue to appear reinforces that people in the U.S. still have greatest awareness of the cost of care and the means in which they access it. This continues to reinforce that it is critical we see cost and insurance access as essential parts of the experience conversation.

Figure 3. Which healthcare issue is most important to you?

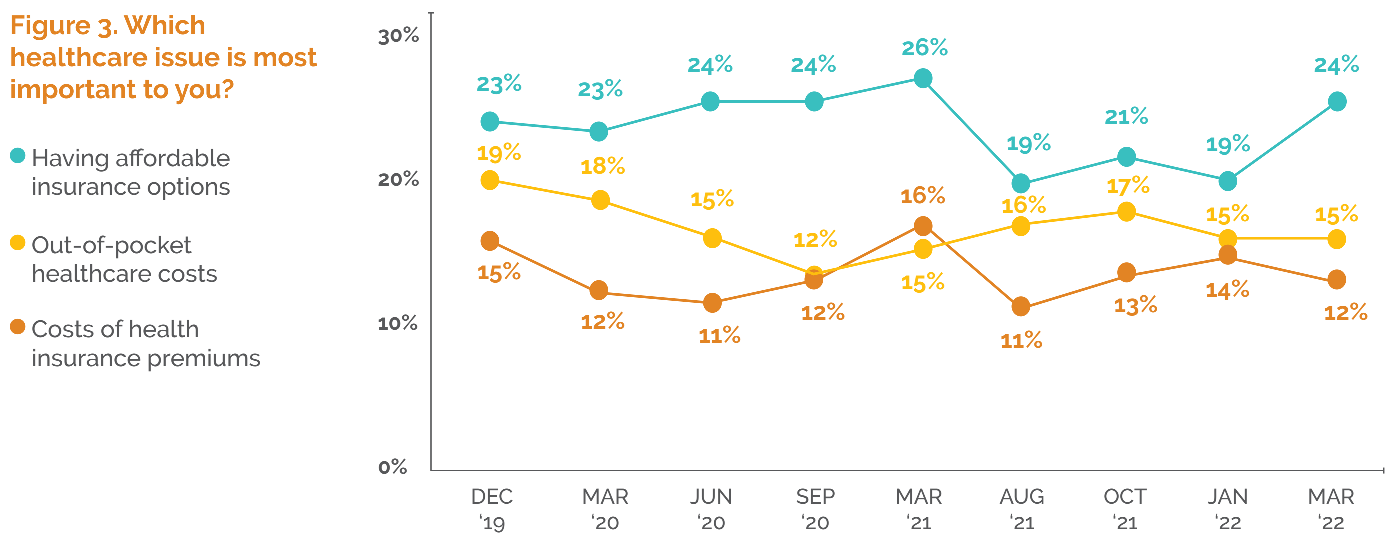
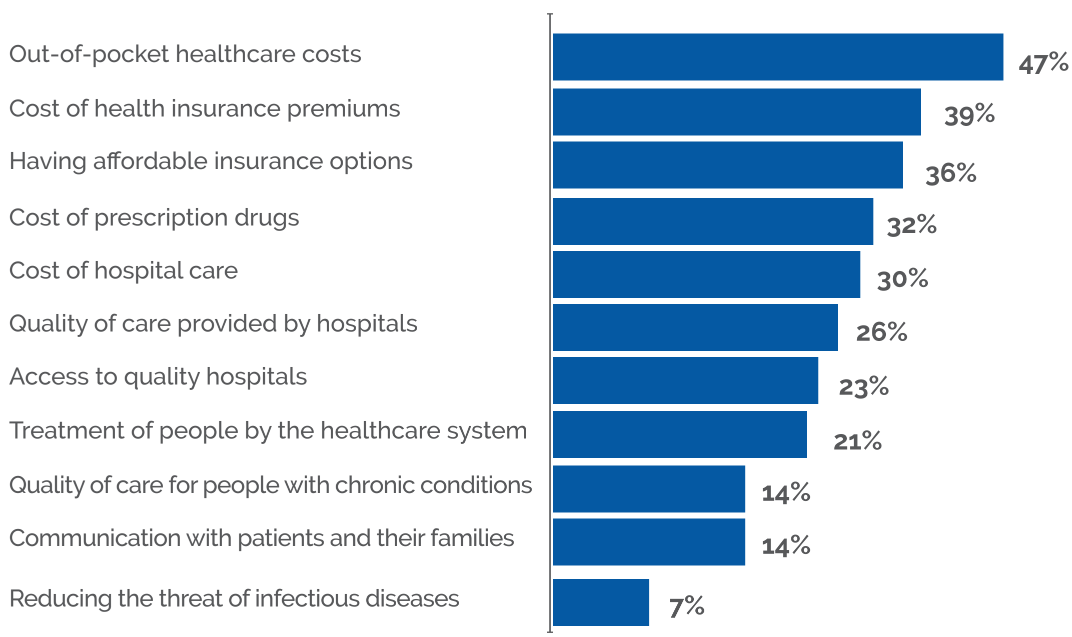


Figure 4. Which healthcare issues are most important to you? (Top 3)



EXPERIENCE HOLDS STEADY IN IMPORTANCE AS DO THE PRIMARY REASONS WHY

Importance of patient experience continues to remain stable with a significant number of consumers, with well over 90% reinforcing the importance of experience (Figure 5). Reasons why having a good experience is important also remained consistent, with slight increases since last quarter in the responses on the influence of experience on healthcare decision-making and the recognition that people believe their time matters (Figure 6).

Figure 5. Overall, how important is it that you have a good experience as a patient? (% "Extremely important" or "Very important")

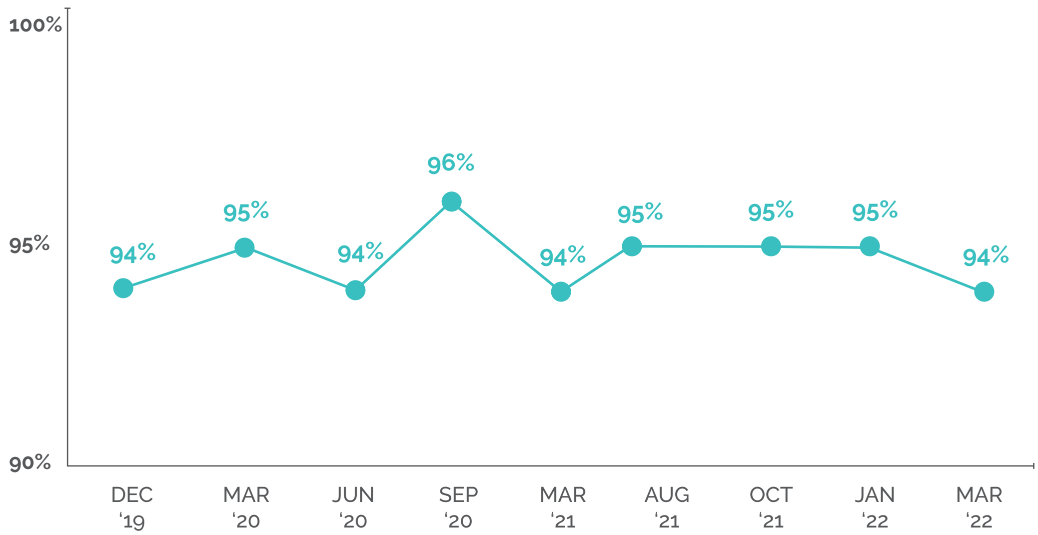
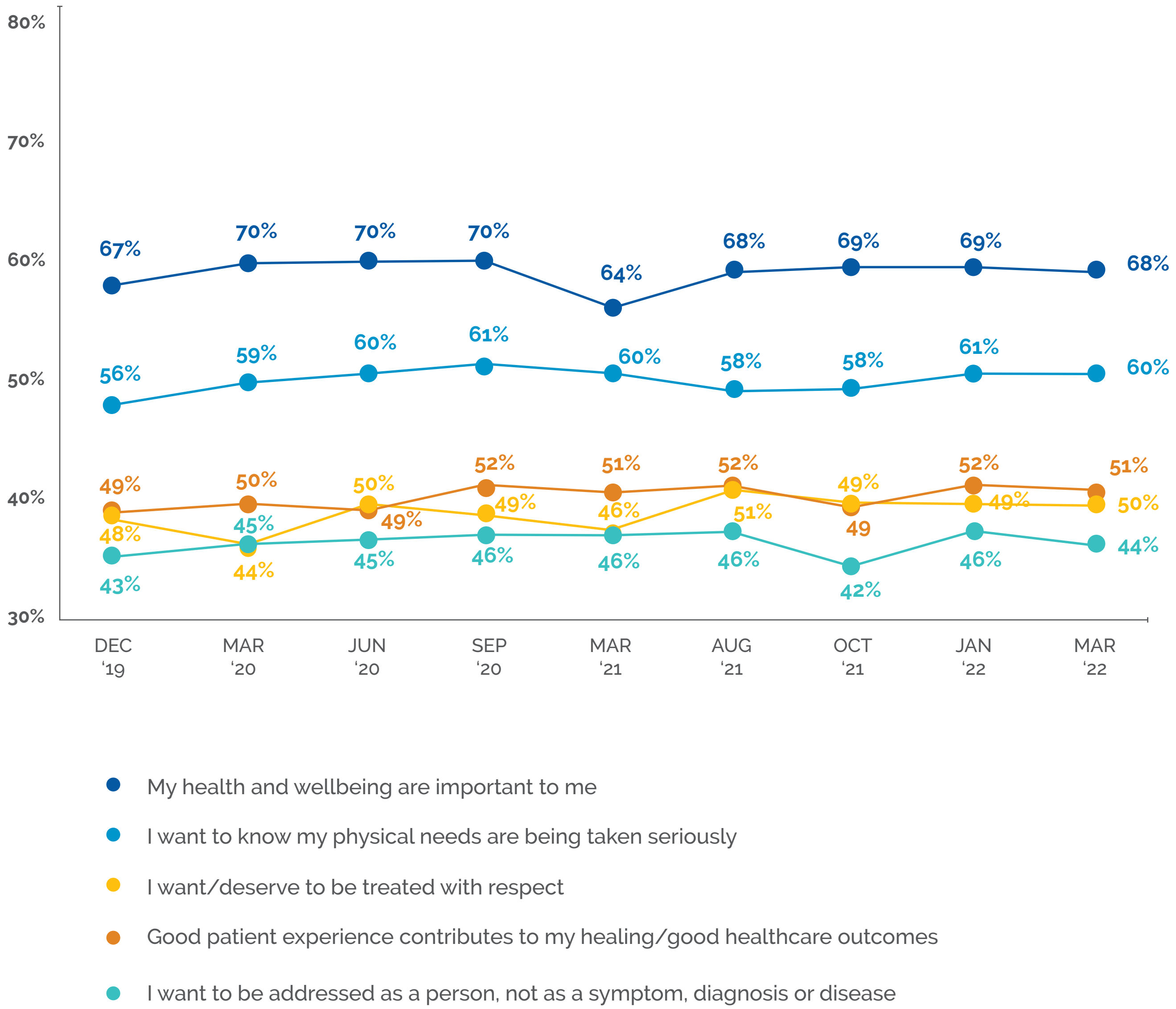


Figure 6. Why is having a good patient experience important to you?

68%	My health and wellbeing are important to me
60%	I want to know my physical needs are being taken seriously
51%	Good patient experience contributes to my healing/good healthcare outcomes
50%	I want/deserve to be treated with respect
44%	I want to be addressed as a person, not as a symptom, diagnosis or disease
37%	It will influence how I make healthcare decisions in the future
35%	I spend my money on this
34%	My time matters
20%	I see myself as a customer

The top 5 reasons why having a good experience is important have remained stable since the start of our data collection. The important point that people see their health and well-being as important remains the top item consistently since prior to the pandemic. This reinforces that consumers of healthcare in the U.S. continue to see their own well-being and the quality of care they receive as an integral part of the experience they have in healthcare, not something separate from it. (Figure 7)

Figure 7. Why is having a good patient experience important to you?



IMPACT OF COVID-19 PANDEMIC

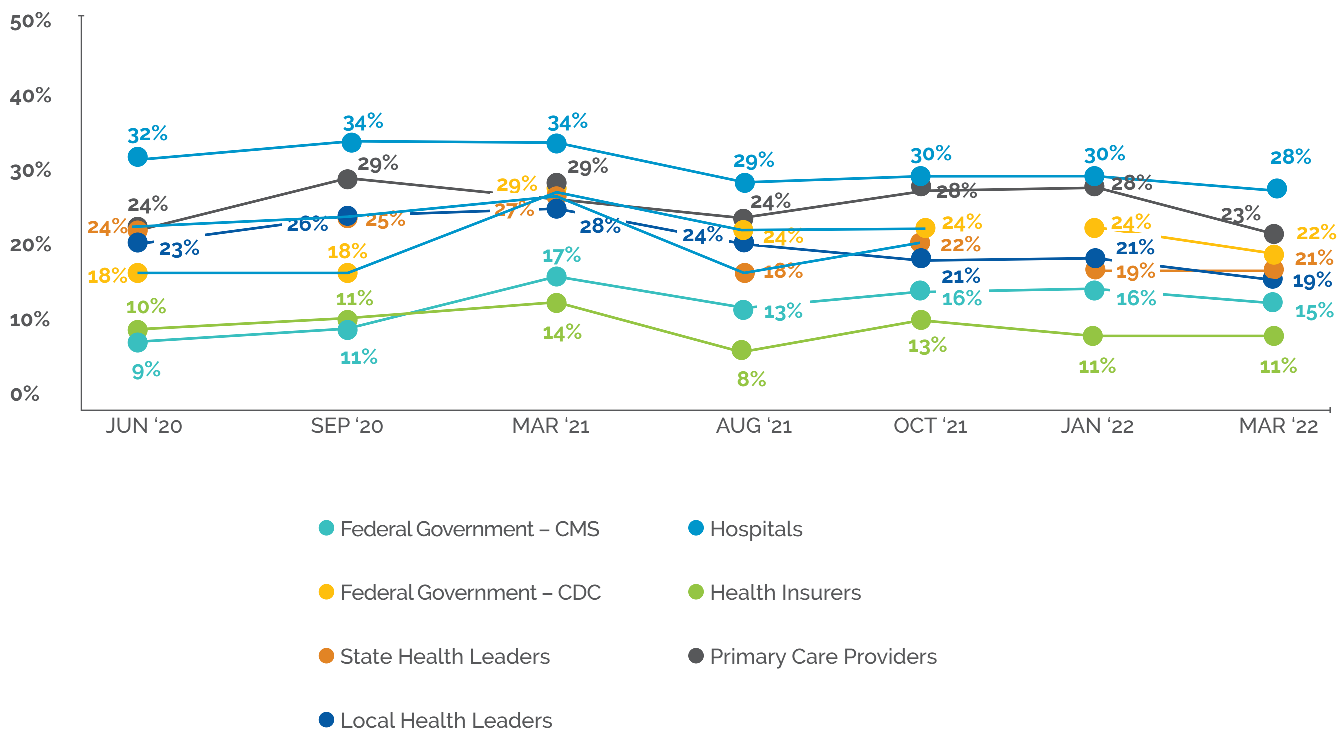
In this release, we continue to explore the impact of COVID-19 on the perspectives of healthcare consumers. The key areas we examine are the perspectives of various segments of the healthcare ecosystem and the comfort with which people are engaging in healthcare.

STATE HEALTH LEADERS SEE AN INCREASE IN POSITIVE PERCEPTION WHILE NEGATIVE PERCEPTIONS OF LOCAL HEALTH LEADERS AND HEALTH INSURERS CONTINUE TO CLIMB

Since June 2020, we have been asking how the pandemic has changed people's perceptions around certain healthcare actors on a range of "made it much worse" to "made it much better." As consumers have traversed the pandemic over the last quarter and are now returning to their healthcare providers to seek care, their perceptions this quarter showed some interesting trends.

In exploring the ratings on if the pandemic has made perceptions "better" or "much better," of all the actors, only one - state health leaders – were perceived by consumers during Q2 as "better" or "much better," up 2 percentage points. Hospitals, local health leaders, and CDC all experienced declines in consumer perception of being "better" or "much better," as did primary care providers with the steepest decline at 5 percentage points. This downward slope may be attributed to providers' inability to meet consumers' expectations for change and the impact and implications of an increased return to primary care (more below). (Figure 8)

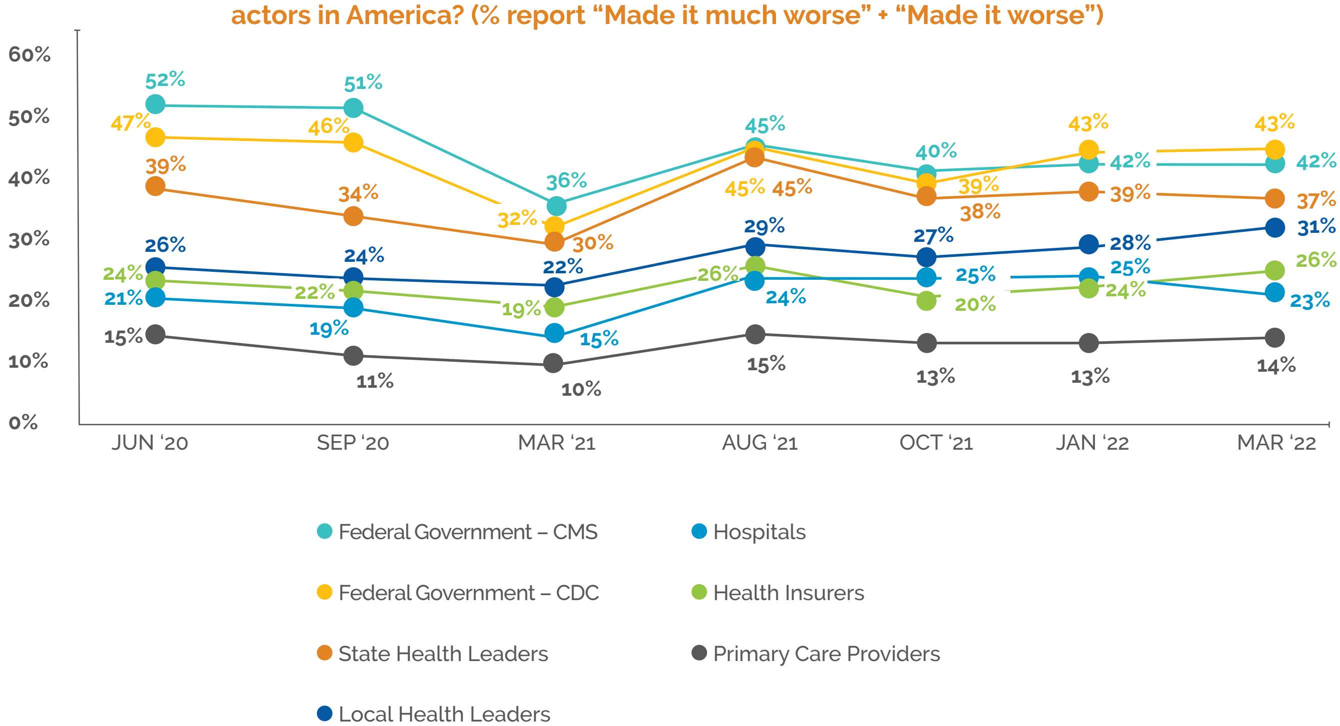
Figure 8. How has COVID-19 changed your perspective of the following healthcare actors in America? (% report "Made it much better" + "Made it better")



Those actors who saw an increase in negative perception this quarter were local health leaders and health insurers, both of which experienced upticks in negative perspectives as a result of COVID.

Alternatively, the actors experiencing a significant decrease in negative perspectives from last quarter include state health leaders and hospitals, both dropping 2 percentage points. Actors within the federal government remained steady from Q1, as much of the management of the pandemic has now turned to local officials, and the broader federal response has been in ensuring local funding and the availability of tests for all Americans. (Figure 9)

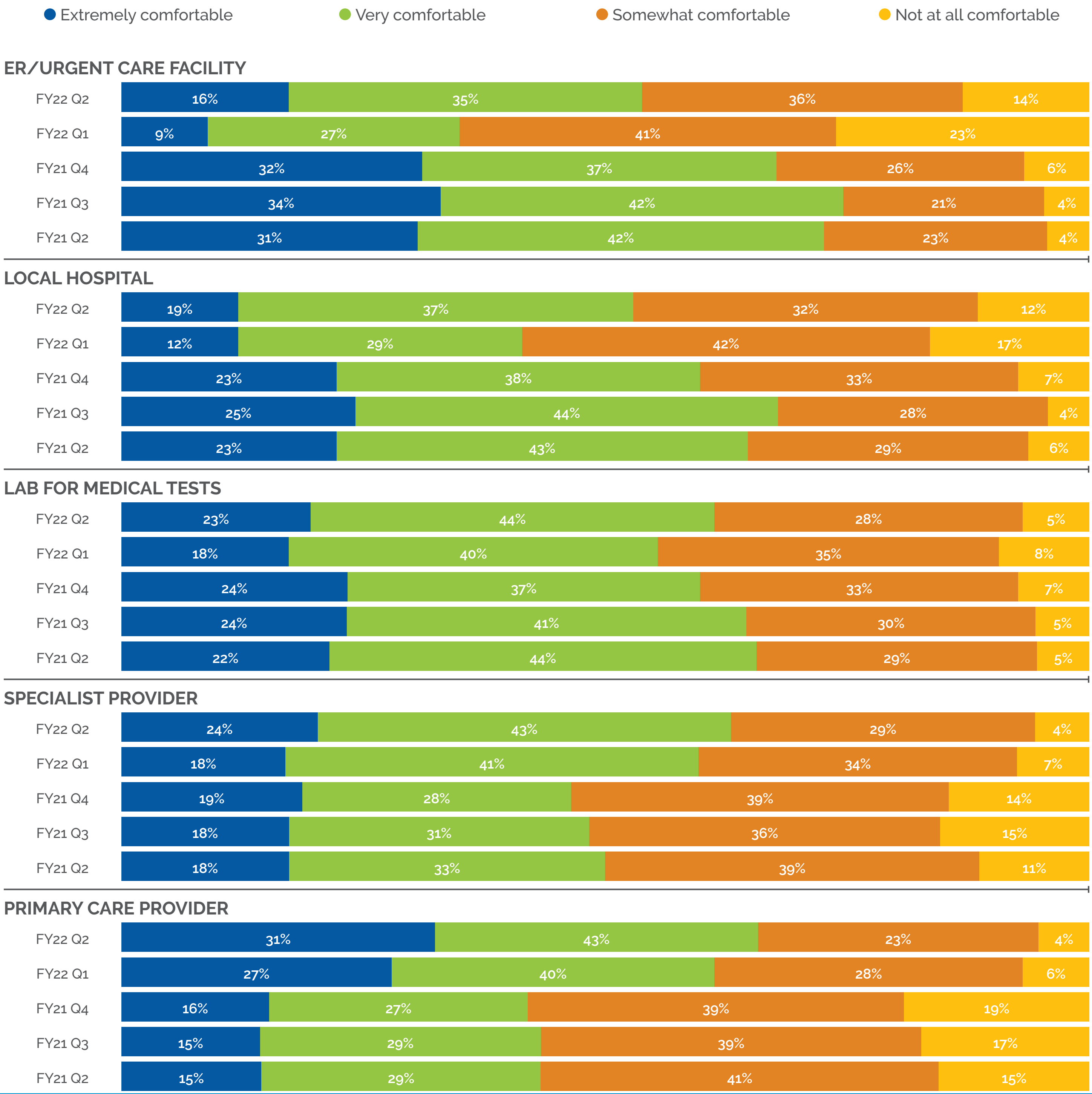
Figure 9. How has COVID-19 changed your perspective of the following healthcare actors in America? (% report "Made it much worse" + "Made it worse")



COMFORT IN SEEKING CARE SIGNIFICANTLY RISING

Since we first asked people about their comfort in seeking care, we have seen comfort levels generally increase over time but with significant pullbacks during some quarters. However, there has been a consistent upward shift as we moved through the pandemic, particularly for primary care providers. Comfort seeking care from primary care providers is now double what it was in 2021. While ER/urgent care and local hospital comfort levels improved this quarter, which is good news, neither segment is back to the comfort levels seen in 2021. This implies consumers are still skeptical about seeking care outside of primary care practices which perhaps reflect safer, more controlled environments, versus larger healthcare settings that consumers feel may expose them to greater risk. (Figure 10)

Figure 10. At this time, how comfortable are you seeking healthcare services from the following?



HEADLINES AND A STANDING CALL TO ACTION

As we continue our exploration on perspectives of experience, we continue to see the sustained importance of this topic to the U.S. health consumer. With over two years of trends now reflected that carry us from before and through the COVID-19 pandemic, we see that while the pandemic has some impact on issues of perception and comfort, the importance that people place on the experience they have has not wavered.

The consistency with which consumers have engaged in this question suggest that the importance of what experience is and how we address it across healthcare settings must remain a priority for healthcare organizations. It also reinforces the integrated nature by which people view the experience they have in healthcare and reinforces why we must sustain a broad and diverse range of voices and perspectives in the overall experience conversation.

This most recent release of PX Pulse focused on the core questions we have asked from our start and continues to explore the impact of COVID-19 on consumer perspectives overall. What we found was:

- Perceptions of quality and experience have remained stable.
- Cost and affordability continue to be the most important healthcare issue.
- Healthcare consumers are more comfortable seeking care across all settings than last quarter.
- While negative perspectives of healthcare actors remained stable, positive perspectives declined for a number of actors, including Primary Care Physicians. It is unclear what is causing this decline, but increased comfort in seeking care may have increased utilization and resulted in consumers recalling former pain points or discovering new pain points brought on by new COVID policies and procedures.

In all we explored, what we see is that a focus on and commitment to experience remains essential for all in healthcare. As an item of great importance to U.S. healthcare consumers, it cannot be taken for granted nor overlooked. A commitment to excellence in experience will continue to call upon healthcare leaders and the healthcare workforce to set clear objectives, engage in focused action and commit to sustained efforts to support the best in experience possible. It is key to acknowledge what we have long held, that experience is not about how satisfied people are, but rather it is about the things that matter to them: their health and well-being, access to affordable care and recognition of the human being seeking care as more than a diagnosis or room number.

It too highlights the importance of a focus on human experience overall. For in caring for the U.S. population, we must remain committed to those who show up to work in healthcare every day as well. That is the opportunity a commitment to experience reveals. It is what the data supports and the voices of consumers reflect. In their service, our call to action remains a commitment to the human beings on both sides of healthcare, and we must not waver.

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