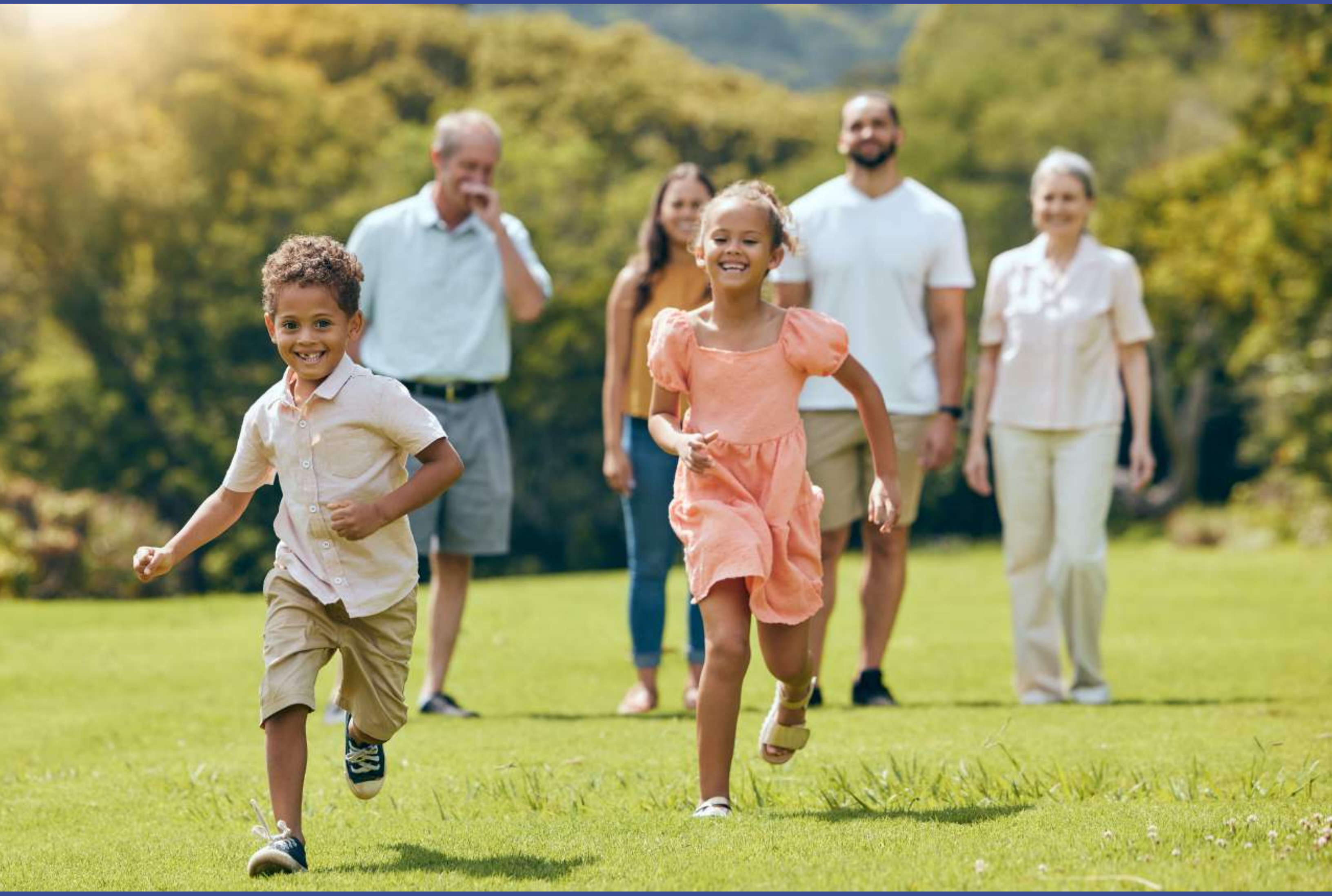
The Beryl Institute - Ipsos PX Pulse
Consumer Perspectives on Patient Experience in the U.S.

JANUARY 2023



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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.

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

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About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.
Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD).ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
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The publication of these findings abides by local rules and regulations.

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INTRODUCTION

In this edition of The Beryl Institute – Ipsos PX Pulse, our 11th release, we continue to explore the core trends impacting the human experience in healthcare in the United States. This issue presents the findings from our core question set.

This release reveals a rebound in consumer perception on the quality of care from our last report in Q3 2022. In that release, the rating on this question hit its lowest point since first collecting data in late 2019, perhaps reflecting some momentary questions about the state of healthcare in the U.S. In our current findings, we see most responses to our core questions settling back to pre-pandemic levels.

While most perspectives have held steady, we still see a wavering in the comfort people have in seeking care since the pandemic. Findings from this inquiry reveal that consumers are less comfortable seeking care in Q4 than they were in Q3 in all settings we explored. In addition, in the challenging economic times in which we find ourselves, the most important issues to healthcare consumers remain cost and affordability.

These findings reinforce the most critical issues for people engaging in healthcare today. They are expecting high quality and seeking positive experiences, while managing the challenges of our healthcare system in terms of cost, access and more. Through the data, we see the broader story of healthcare consumers across the U.S. and can work to address the issues they reveal. Our hope remains that PX Pulse provides insights that will serve as a call to action and guiding light for healthcare organizations to improve their efforts overall. The voices of the U.S. healthcare consumer should be the catalysts and motivator in ensuring the best in experience. It is up to healthcare leadership to truly 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.

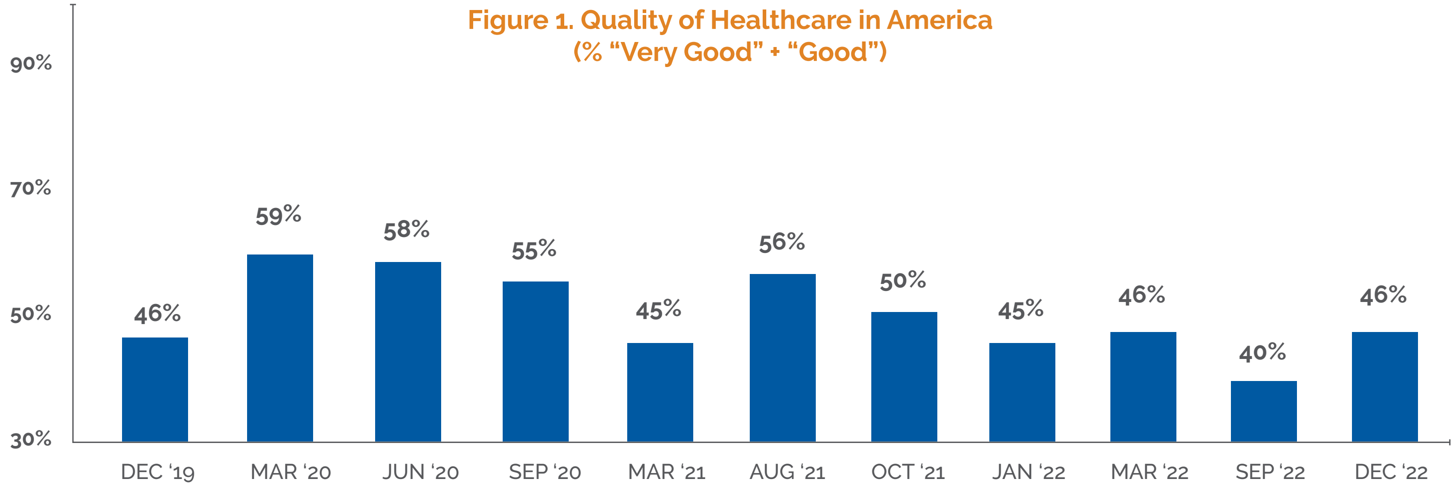
In total, 1,011 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from November 1-12, 2023 to a sample group of people that were randomly selected to be representative of the U.S. population in terms of Census estimates of gender, age, race, ethnicity, education, income and region. The survey was fielded in English-only. Findings presented in this report were weighted to correct for any over- or under-representation in the distribution of completed surveys across these demographic categories, as well as to account for the aforementioned over-sampling.

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

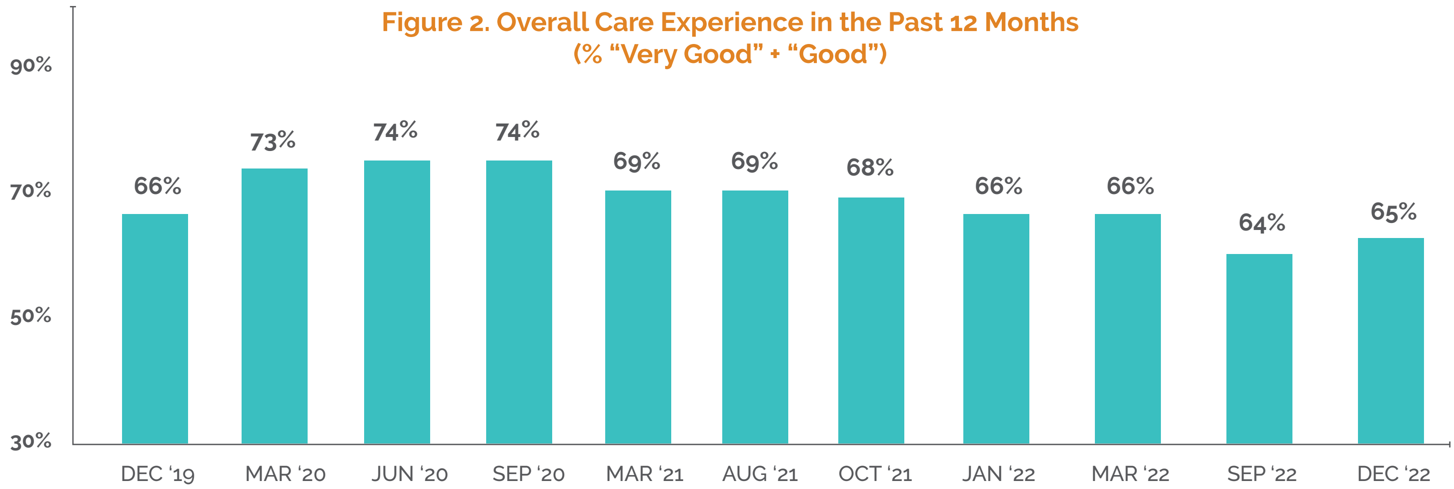
The core question we have asked since the launch of PX Pulse includes:

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

CORE TRENDS



In Q4, consumers' perception of the quality of healthcare in America rebounded 6% from last quarter, returning to early 2022 levels. This reset, after the steep decline we saw in Q3, may be an indicator that the pressures on healthcare including workforce shortages, supply chain issues and other issues impacting experience may be stabilizing.



Overall care experience saw a slight uptick from last quarter with ratings holding stable at their pre-pandemic level.

Importance of Healthcare Issues

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

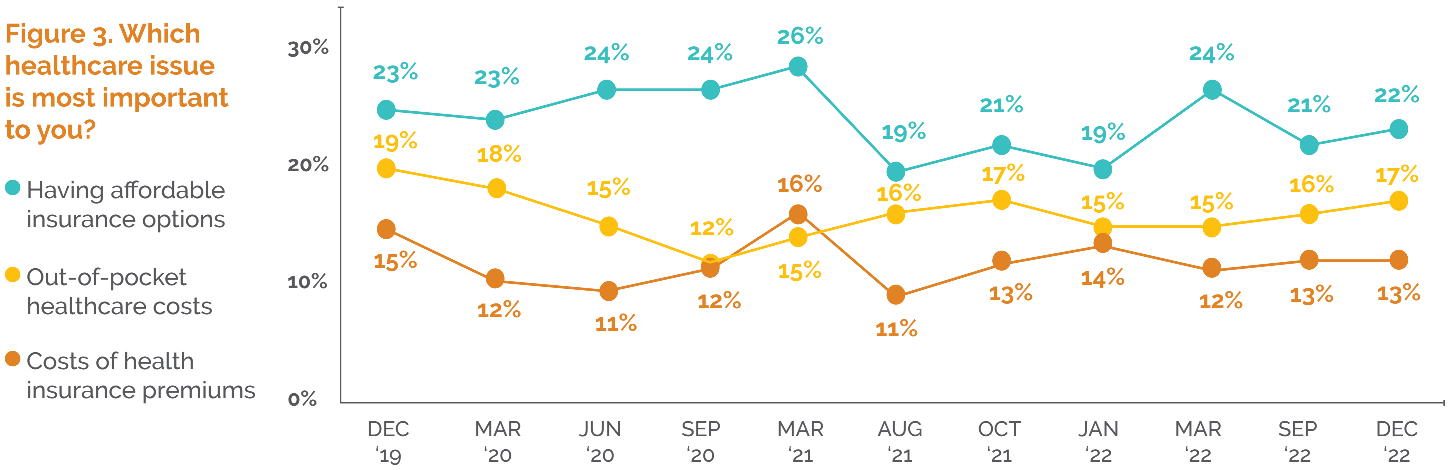
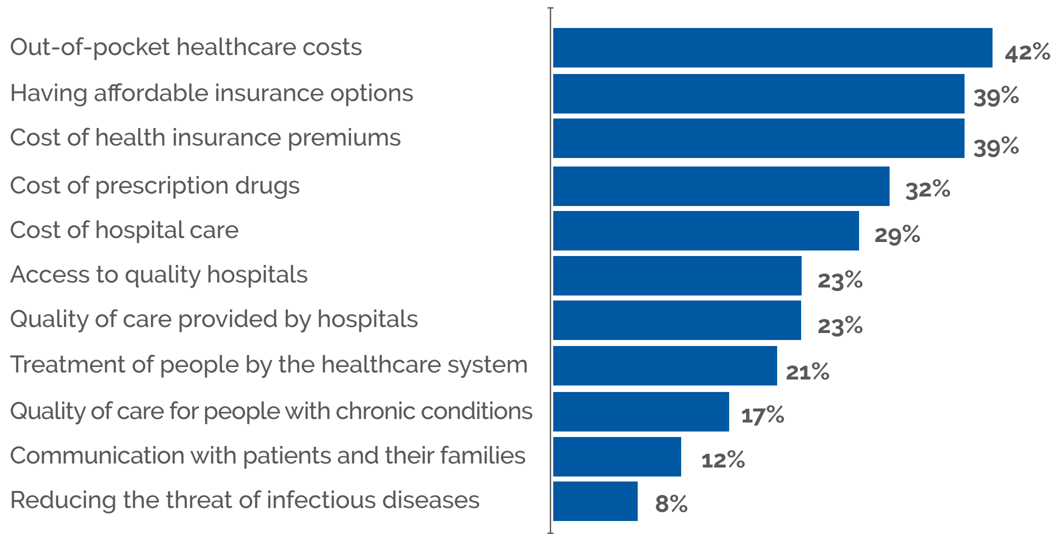


Figure 4. Which healthcare issues are most important to you? (Top 3)

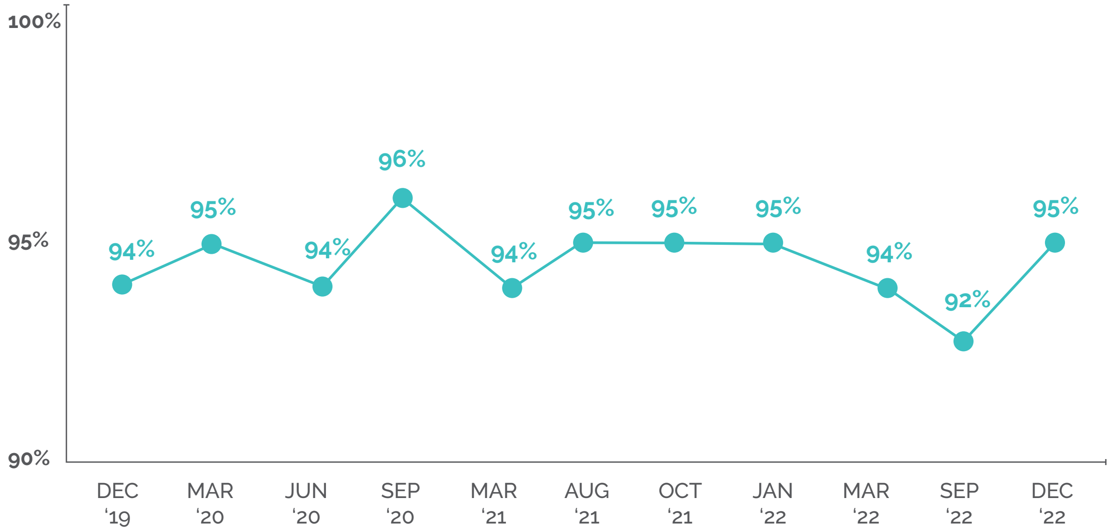


The most important healthcare issues for U.S. consumers remained stable in Q4, and the order of the issues remained the same, with cost and affordability holding strong as the top issues.

A slight increase of 3 percentage points was seen in individuals selecting "treatment of people by the healthcare system" as one of their top three healthcare issues from our previous report.

Importance of Experience

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

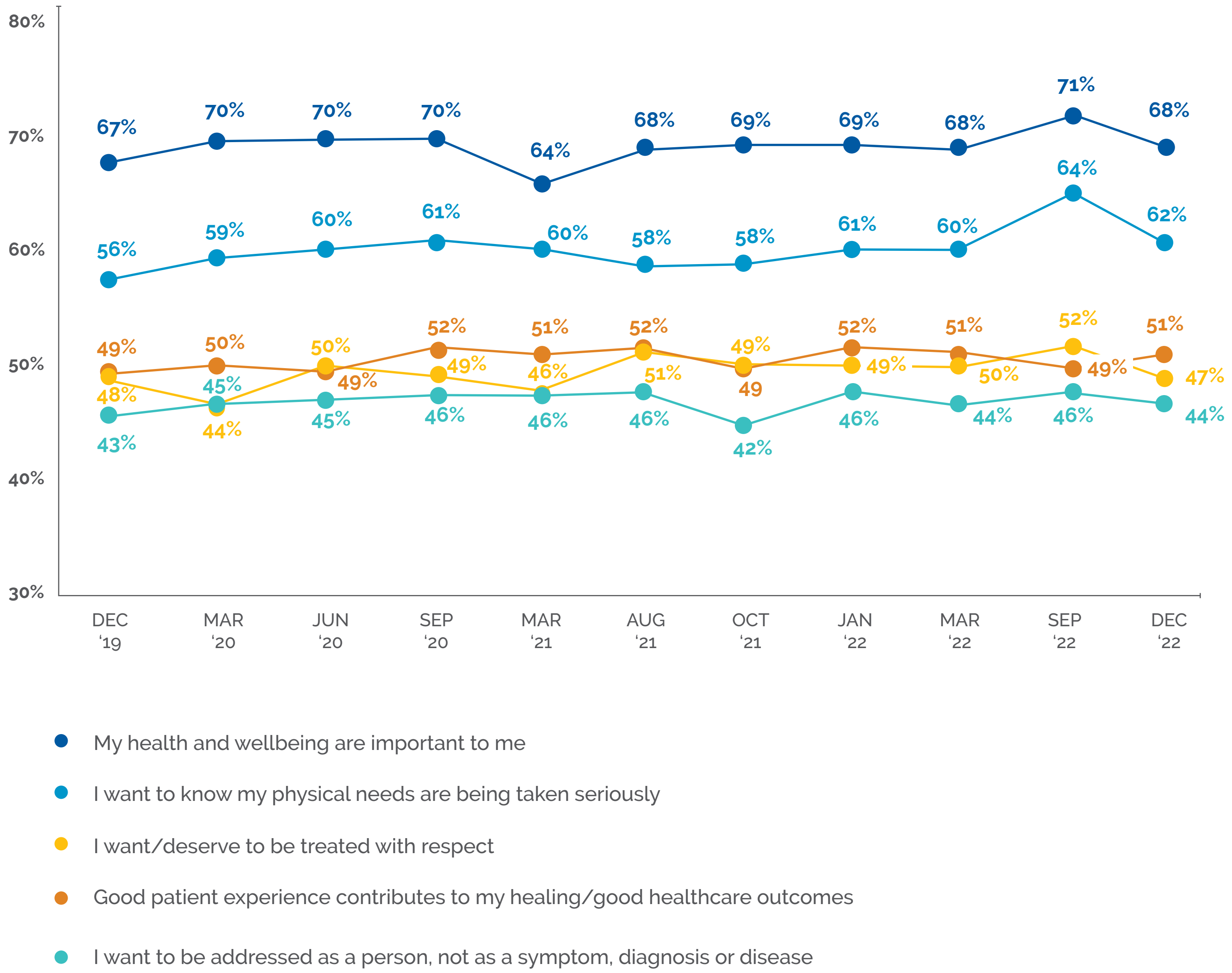


Why is having a good patient experience important to you?

68%	My health and wellbeing are important to me
62%	I want to know my physical needs are being taken seriously
51%	Good patient experience contributes to my healing/good healthcare outcomes
47%	I want/deserve to be treated with respect
44%	I want to be addressed as a person, not as a symptom, diagnosis or disease
39%	It will influence how I make healthcare decisions in the future
36%	I spend my money on this
32%	My time matters
19%	I see myself as a customer

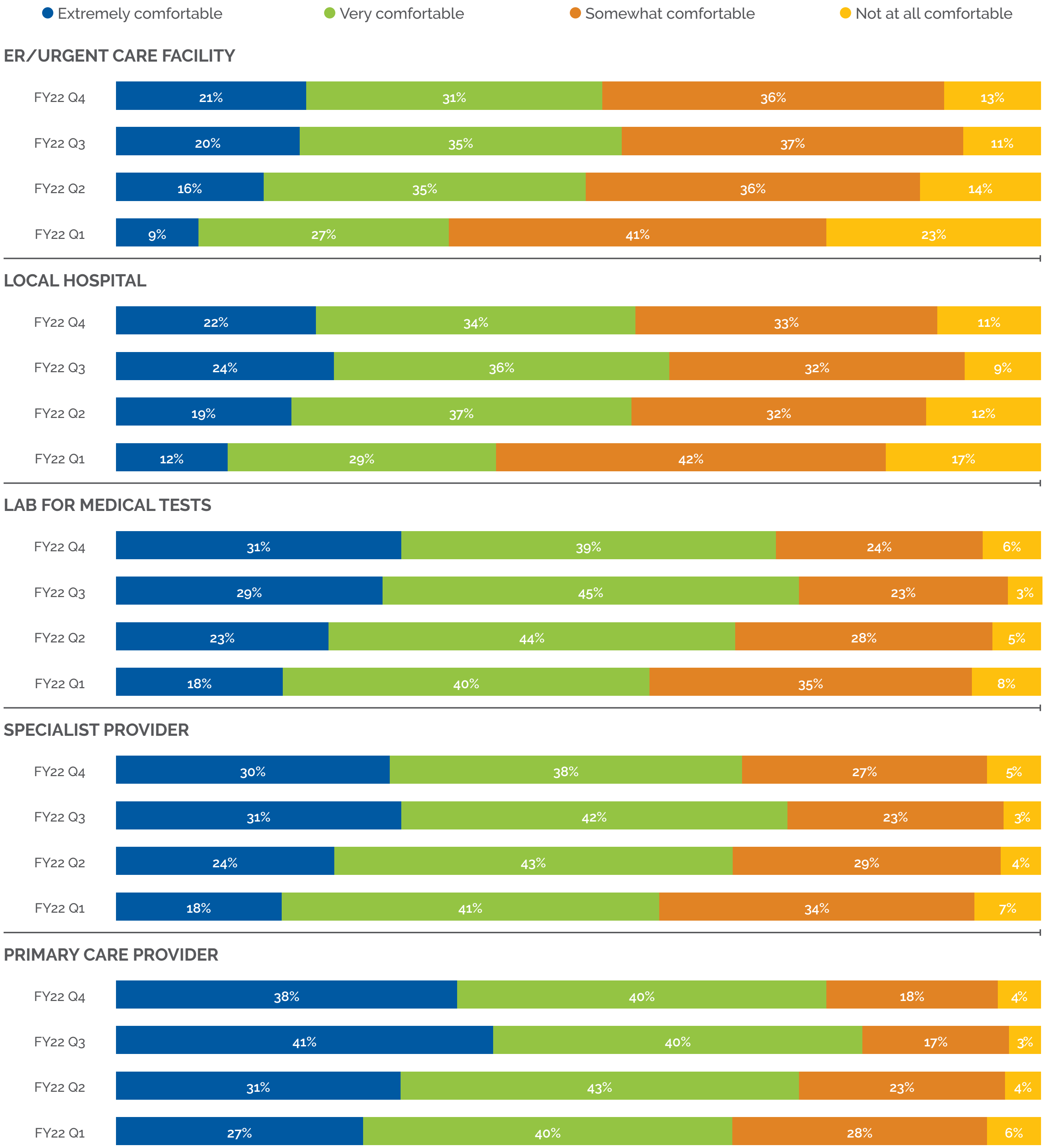
Importance of patient experience increased 3%, returning to 95%, the approximate level of importance seen since PX Pulse started. Top reasons for why having a good experience is important remained the same, with a slight increase in people noting a good experience "contributes to my healing/good healthcare outcomes."

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



The top 5 reasons why having a good experience is important have remained the same for the life of PX Pulse. Of the top 5 reasons, one has maintained a slightly upward trend since the start, "I want to know my physical needs are being taken seriously."

Figure 7. At this time, how comfortable are you seeking healthcare services from the following?



In this release, consumer comfort level in seeking healthcare services fell in Q4. The combined rating for responses “Extremely comfortable” and “Very comfortable” saw a decrease in the level of comfort across all care settings, the greatest of which being a 5% decrease for specialty providers.

SUMMARY POINTS

As we start 2023, this release of PX Pulse reflects the weight of the pandemic lifting ever so slightly and a return to normalcy. But there is still work ahead of us to address healthcare's new realities and to improve and support the healthcare experience for consumers across the U.S. With a mix of consistent trends and new opportunities reflected in this edition, we should be mindful of the below key headlines as we set the course for the remainder of the year:

- The rating of the quality of healthcare in America bounced back from Q3, from 40% to 46%, and the overall care experience rating remained stable. These trends are critical dimensions to continue to focus on in 2023 with intentional actions to push the ratings upward.

- Issues related to healthcare costs remain most important to consumers. The financial and economic impacts brought on by the pandemic are well understood, calling also for an understanding of the role that cost and affordability plays in healthcare outcomes.

- The importance of experience remains high at 95%. Top reasons for why having a good experience is important remained the same, with a slight increase in people noting a good experience "contributes to my healing/good healthcare outcomes." This significance of health and well-being to consumers should be a focus for healthcare organizations in 2023.

- The level of consumer comfort to seek care decreased from the last quarter, particularly from specialty providers. While we are emerging from the clouds of COVID-19, consumer safety in all care settings must be emphasized so consumers are not fearful to get the care they need.

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