

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

NOVEMBER 2022



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*We define the patient experience as the sum of all interactions, shaped by an organization's culture, that influence patient perceptions across the continuum of care. We believe human experience is grounded in the experiences of patients & families, members of the healthcare workforce and the communities they serve.*

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# INTRODUCTION

This report represents the 10th release of The Beryl Institute – Ipsos PX Pulse as we continue to explore the core trends impacting healthcare and the human experience overall in the United States. This is our first full issue in which we have explored the full battery of consumer priorities in a new world of COVID. While it may be hard to dub this the post-pandemic era yet, we are now in a healthcare world that has learned to operationalize the realities of this pandemic.

Yet with the realities of this new era for healthcare, so come great challenges. As we hear from across the global experience community, the issues related to workforce shortages and strain, incivility and violence, societal malaise and financial pressures are creating a perfect storm of pressure on healthcare today. The buffeting of these various winds on healthcare is also seemingly taking its toll.

In this edition of PX Pulse, we see issues in both how people see the quality of care they are receiving and the experience they are having in healthcare today. The ratings on these numbers have hit their lowest point since we first collected data in late 2019. At the same time, we explore the impact that these few years have had on trust in healthcare overall.

The data reveal trust has faltered due to a number of factors, but mainly driven by people's perception that healthcare organizations are looking out for their own interests before their patients and communities. This is a significant caution sign for healthcare, but perhaps it can be reframed as a gift, as the voices of consumers also are helping to light a path toward improvement.

This issue also reintroduces the core consumer questions asked in late 2020 and initially in 2018 with some clear and consistent results. People still seek care, because their health is important to them, but what they want from healthcare organizations is to be listened to, communicated to clearly, shown respect and provided clear plans of care to lead them forward.

This issue of PX Pulse may be the clearest in both laying out the challenges being faced by healthcare and paving a path forward to tackle them. The trends shared here reveal the opportunities for action healthcare organizations can take. They reinforce an essential need, that if we commit to transforming the human experience in healthcare, we are ultimately working to achieve all we seek for those engaging in healthcare: positive personal outcomes, positive environments to work in and a positive impact on the communities we are honored to serve.

This PX Pulse reminds us that in gathering data, we see the stories of our reality revealed in real time. We also find paths to action that will lead us forward to a greater day for healthcare. Our hope is this PX Pulse and every issue to follow will help us do just that.

# METHODOLOGY

This research was conducted using online surveys fielded through the Ipsos KnowledgePanel,<sup>®</sup> 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, 1,054 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from August 19-28, 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 and have a 3.3% margin of error.

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 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?

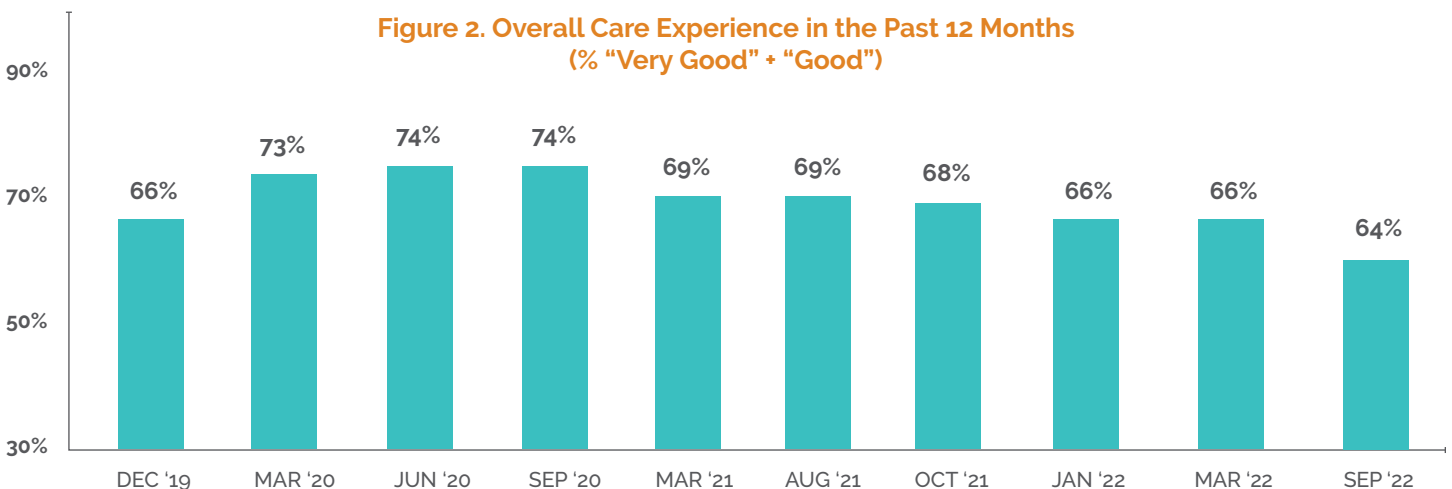
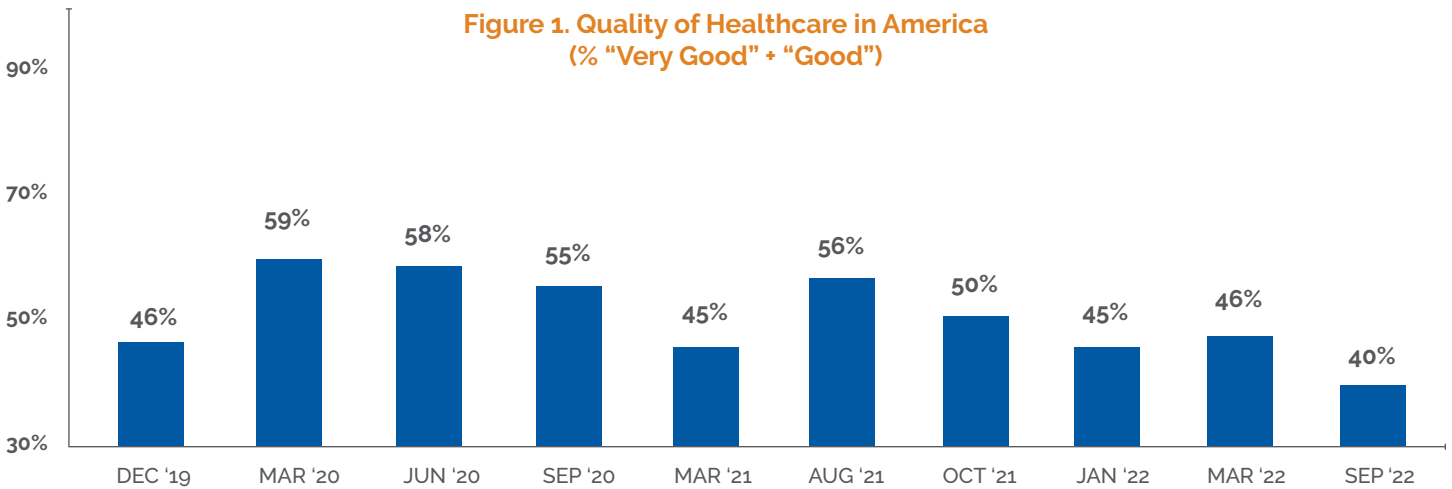
# CORE TRENDS

## CONSUMERS' PERCEPTION OF QUALITY SLIDES SIX PERCENTAGE POINTS TO LOWEST POINT IN OUR TRACKING

While consumers' perception of the quality of healthcare in America reset to initial pre-pandemic levels earlier in the year, in our last inquiry, the perception of quality took a steep slide. Down six percentage points from our March survey, now only 40% of respondents answered "Very Good" or "Good" in rating the quality of healthcare. This is the lowest response seen since the start of PX Pulse (Figure 1).

## WHILE QUALITY TOOK A BIG DECLINE, EXPERIENCE ALSO SLIPPED TO AN ALL-TIME LOW.

While perception of the care experience remains higher than the care quality that people believe they receive, we also saw a reset and leveling of experience ratings earlier this year to pre-pandemic levels as well. In our most recent inquiry, those numbers saw a further decline. Now 64% report they have had a "Very Good" or "Good" overall care experience in the last 12 months (Figure 2).



It is interesting to reflect on both measures and follow the trends we saw at the height of the pandemic for most of 2020 and early 2021 where we saw very strong ratings on both quality and overall care experience. While the leveling we saw might have been expected, especially after the unique moments caused by the pandemic, the precipitous drop at this point could be reflective of the moment in which healthcare now finds itself.

As noted in earlier issues of PX Pulse and other outlets, the weight on healthcare with workforce and staffing challenges, supply chain issues and economic tightening have placed enormous pressure on healthcare specifically. It can only be expected these pressures are reflected in the very ways people experience care overall.

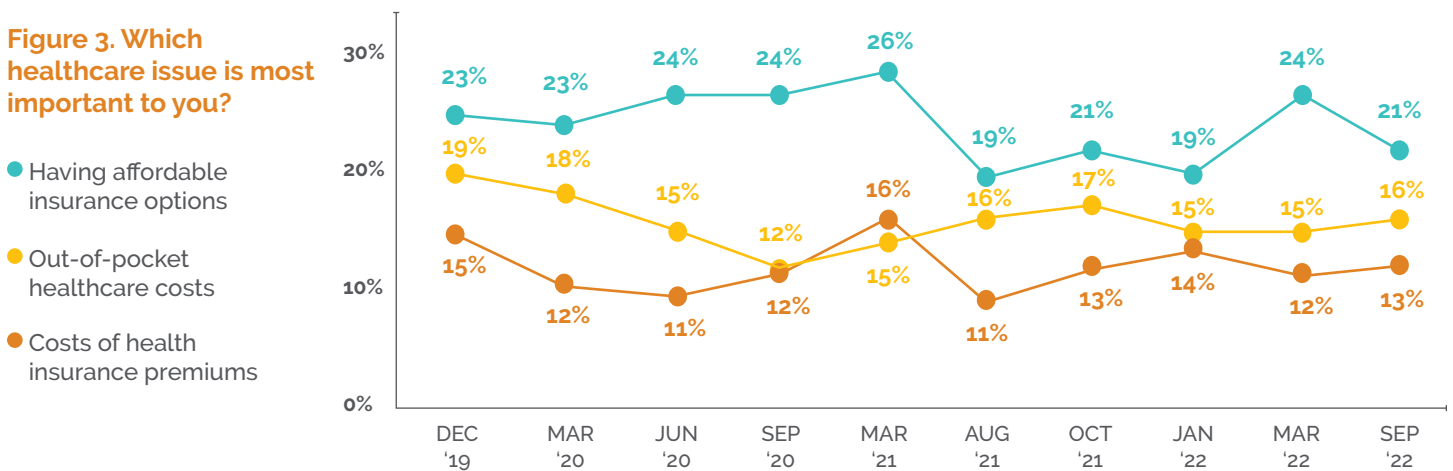
In our January 2022 PX Pulse when we explored the issues of incivility in healthcare, the reasons people noted as the greatest causes of incivility itself were healthcare workforce fatigue and general strain on the healthcare system. These perceptions earlier in the year may contribute to a perceived decline in experience.

The scores we are seeing in this report bear this out and should act as a warning light for healthcare in what it will take to regain both the positive engagement and support of the healthcare consumer. (We will dig deeper into the issues of trust later in this report).

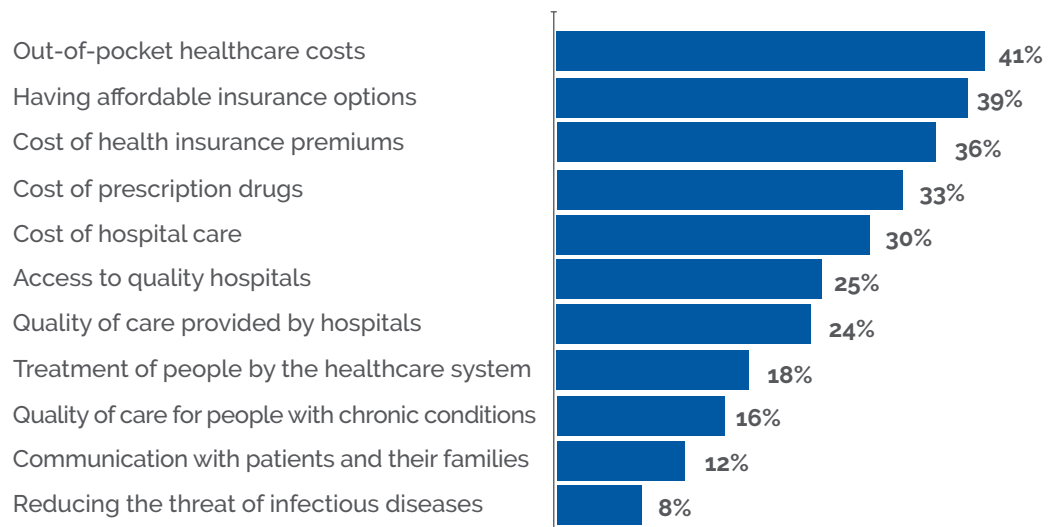
## COST CONTINUES TO BE TOP OF MIND FOR AND MOST IMPORTANT TO THE U.S. CONSUMER

In asking which healthcare issue is most important, "having affordable insurance options," "out-of-pocket costs," and "cost of insurance premiums" held the top spots. Overall, "out-of-pocket costs" remained the top item of importance, but we saw the issue of "affordable insurance options" climb above cost of premiums. This subtle shift may be reflective of people more readily returning to seek healthcare after the height of the pandemic and with this desire are looking to the best means to be able to access care (Figures 3 and 4).

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



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



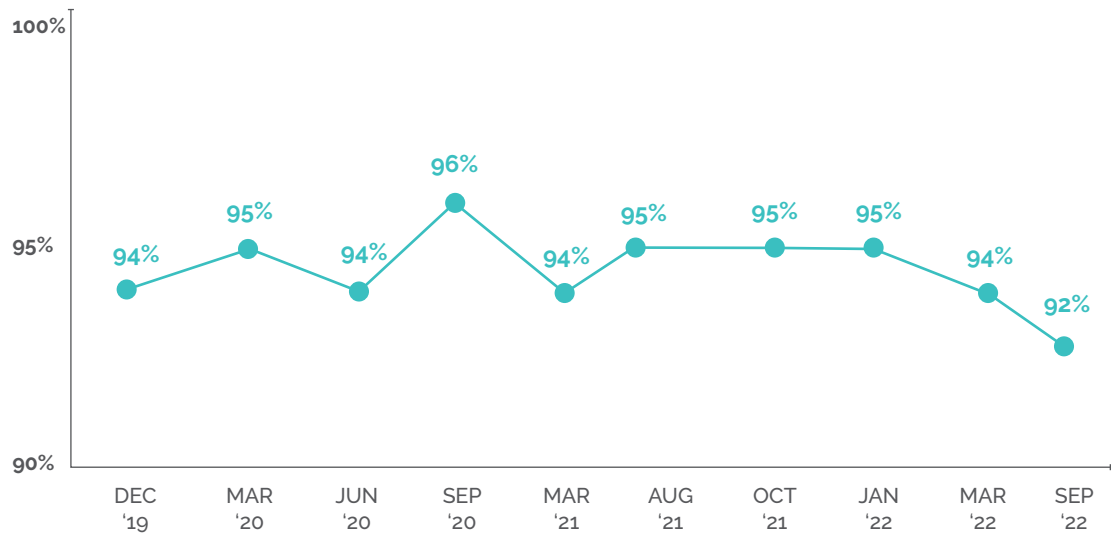
## THE IMPORTANCE OF EXPERIENCE SLIPS WHILE PEOPLE CONTINUE TO REINFORCE THAT “MY HEALTH AND WELLBEING ARE IMPORTANT TO ME”

With the other factors revealed in the findings on our core questions, a decline in response to “how important is it that you have a good experience as a patient?” by two points was also telling. While still high, with 92% of respondents saying this is “Extremely important” or “Very important” to them, this slip may be reflective of the overall concerns with the healthcare system at this moment (Figure 5).

Of interest, in accompanying this question and asking, “why is having a good experience important?” the top

items remained similar, and almost all increased in response. People continue to reinforce that “my health and wellbeing are important to me” (up three percentage points) and “I want to know my physical needs are being taken seriously” (up four points). We also saw the personal questions climb with “I want/deserve to be treated with respect” and “I want to be addressed as a person, not as a symptom, diagnosis or disease,” both climbing two points as well. This reflects an interesting tension as people show how important their health and personal treatment remain (and even increased) in the face of this slip in importance.

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



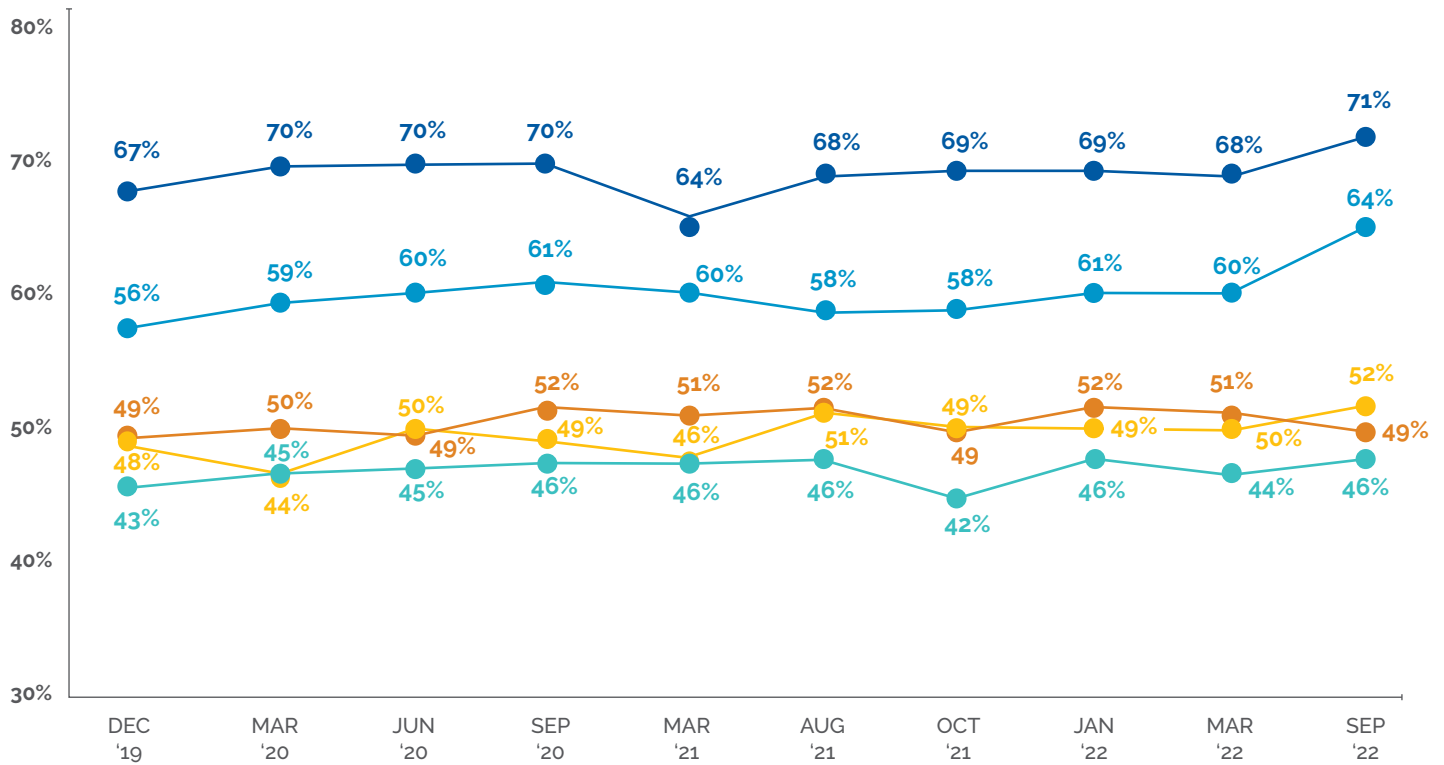
### Why is having a good patient experience important to you?

- 71%** My health and wellbeing are important to me
- 64%** I want to know my physical needs are being taken seriously
- 52%** I want/deserve to be treated with respect
- 49%** Good patient experience contributes to my healing/good healthcare outcomes
- 46%** I want to be addressed as a person, not as a symptom, diagnosis or disease
- 35%** It will influence how I make healthcare decisions in the future
- 35%** I spend my money on this
- 37%** My time matters
- 20%** I see myself as a customer

While the top reasons remained the same, we saw "I want/deserve to be treated with respect" climb into the third slot. In looking at the trends of these top five items, we see all but one climbed to the highest percentage we have reported since the start of PX Pulse. Of significant interest is the substantial four point increase we see in "I want to know my physical needs are being taken seriously" (Figure 6). The healthcare realities, residual

and tangential health issues raised and the personal vulnerabilities exposed over the last few years have taken a toll on people and continue to show an impact, even in our data here, as knowing our physical needs are being addressed is a central part of our survival over the last few years and will continue to be a focal point into the near future.

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



- My health and wellbeing are important to me
- I want to know my physical needs are being taken seriously
- I want/deserve to be treated with respect
- Good patient experience contributes to my healing/good healthcare outcomes
- I want to be addressed as a person, not as a symptom, diagnosis or disease



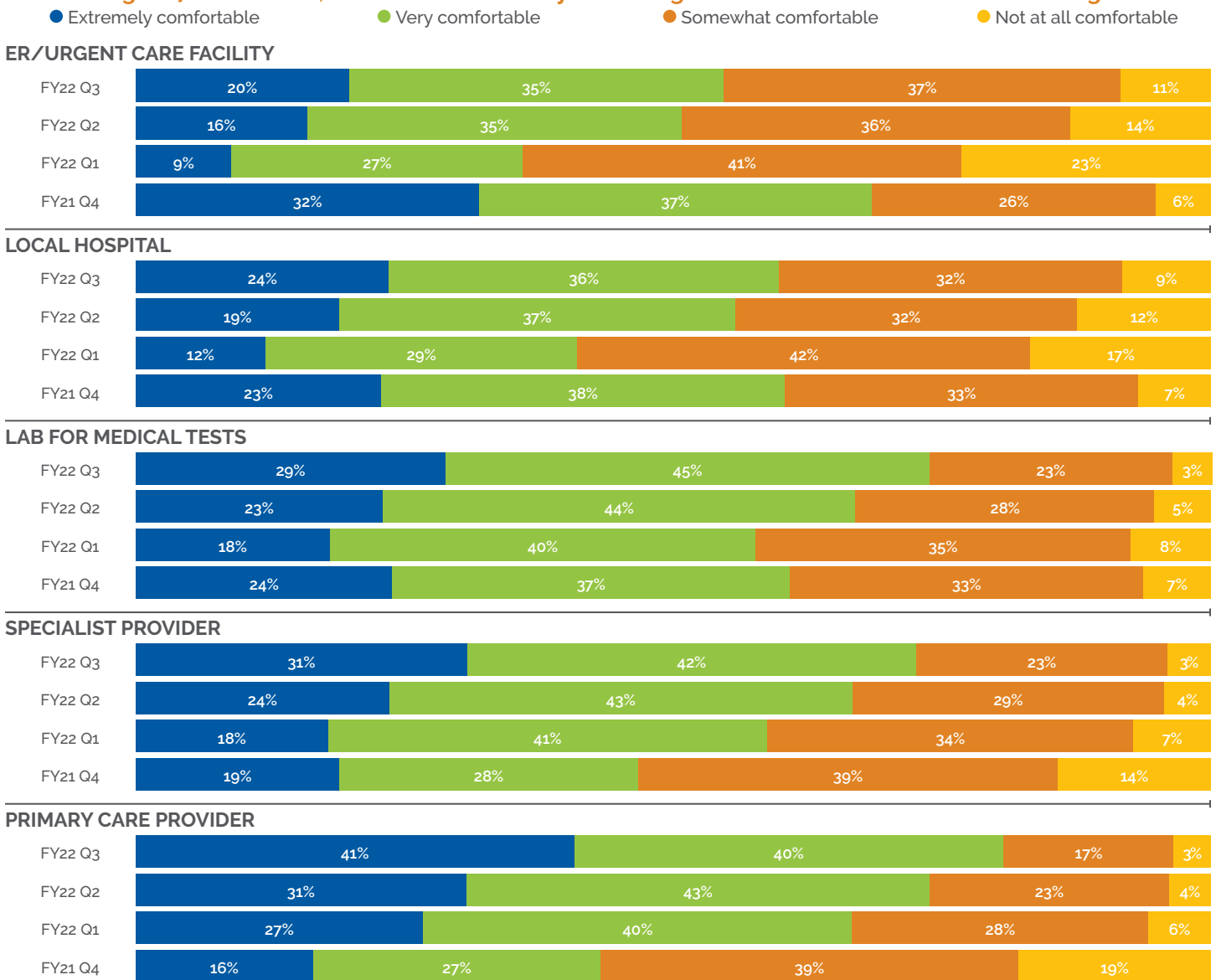
# TRACKING THE IMPACT OF COVID

## COMFORT IN SEEKING CARE CONTINUES TO RISE

We continue to explore a central question related to people's engagement and comfort seeking care, and we see overall comfort continuing to reflect big climbs. The trends in all five areas examined show increases. Primary care continues to lead in comfort with 81% of respondents reflecting they are "Extremely comfortable" and "Very comfortable." Primary care also saw the greatest leap in "Extremely comfortable" of ten points since our last report. Also, as noted in our last report, Specialist and Labs follow in comfort, continuing to reflect a greater level of comfort in shorter, more contained, or manageable encounters.

Good news for those in hospitals is that those reporting "Extremely comfortable" have doubled since the start of the year, showing that people are warming to the idea of reengaging in larger, less contained environments (Figure 7). This would hold true to the greater societal norms we may be experiencing that are seeing people return to larger venues for other activities, from shopping to sporting events, concerts to celebrations. It will be interesting to follow what impact any new reported surges may have or if access to and quantity of vaccinations now alleviate earlier hesitations reflected in the data into the winter cycle.

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



## WHAT MATTERS FOR HEALTHCARE CONSUMERS – PRIORITIES & TRENDS

This release of PX Pulse continues an inquiry by The Beryl Institute first released in 2018 as *Consumer Perspectives on Patient Experience 2018*. This data was again collected and presented in the second report, *Consumer Perspectives on Patient Experience 2021*, as part of data collected in the October 2020 PX Pulse. This section continues to look at some of those trends in advance of a broader global inquiry on these items again in 2023.

The central question in this portion of our survey asked respondents, “When you think about having a good patient/family experience, how important are each of the following to you?” Key findings in this review are revealed in the chart on the next page and reflect data from U.S. consumers only over the last two years. Each item was rated independently. The ranking shown here was only created after aggregating all responses (Figure 8).

Key headlines from consumer perspectives show:

- **“Listen to you” and “Communicate clearly in a way you can understand”** remain the top two items. Consumers are increasingly looking for effective communication at the heart of their healthcare experience.
- **“Take your pain seriously” and “Treat you with courtesy and respect” saw the greatest gains in rank, followed closely by “Provide a clear plan of care and why they are doing it.”** Again, communication-related issues not only remain top items, but additional communication-related and relational/respect-focused items saw the biggest gains in importance.
- **“Ask questions and try to understand your needs and preferences”** is the other communication item that remains in the 10th spot for consumers.
- **The remainder of the top 10 items are related to the safety and clinical quality of the healthcare encounter**, including: “That I receive the appropriate level of care for my needs,” “That my care is delivered safely,” “That my health ultimately improves” and “That my care is delivered with a focus on quality.”

- **The bottom twelve items remained unchanged** reflecting that the place where care occurs remains important but is not as important to the experience people have.

Again, what the respondents reveal is that the items of greatest importance to healthcare consumers as they reflect on a positive experience are not high-cost, big investment items. They remain a commitment to the culture of and communication from a healthcare organization. They reflect the behaviors and expectations people have of healthcare and are driven by the people who serve in healthcare every day.

These findings only further the critical realities that a focus on human experience is where we must amplify our efforts in healthcare to ensure the best for the patients, families and care partners seeking care, the workforce who shows up every day to provide the best in care and the communities in which our healthcare organizations operate.

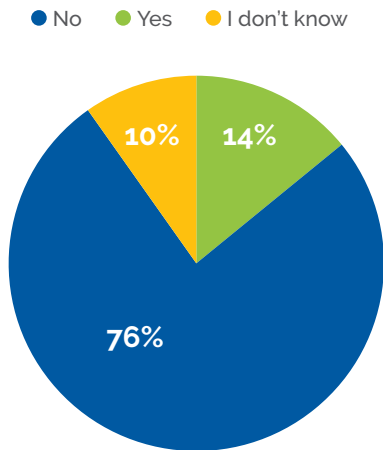
<b>Figure 8. “When you think about having a good patient/family experience, how important are each of the following to you?” (Rating is % Extremely + Very Important)</b>	<b>2022</b>	<b>2020</b>
Listen to you	96%	95%
Communicate clearly in a way you can understand	96%	95%
Provide a clear plan of care and why they are doing it	95%	94%
Take your pain seriously	94%	93%
That I receive the appropriate level of care for my needs	94%	95%
Treat you with courtesy and respect	94%	92%
That my care is delivered safely	93%	95%
That my health ultimately improves	93%	94%
That my care is delivered with a focus on quality	92%	95%
Ask questions and try to understand your needs and preferences	92%	93%
Give you confidence in their abilities	92%	92%
That I achieve positive health outcomes	91%	95%
A healthcare environment that is clean and comfortable	91%	92%
The ability to schedule an appointment or procedure within a reasonable time period	90%	89%
A discharge/checkout process in which your treatment plan and/or next steps in care are clearly explained	89%	88%
A billing process that is clear, understandable, and respectful	87%	89%
Partner with/engage you in making your health decisions	86%	87%
A discharge/checkout process in which you feel you can ask questions for clarification	86%	86%
An understandable and easy process for transitioning your health information between care providers	85%	89%
A waiting time to be seen that you feel is reasonable	84%	85%
A discharge/checkout process in which you are provided information on such items as medication, side effects, pain management, etc.	84%	86%
The ability to easily access your medical information/ records or test results in a timely manner	83%	86%
Respond quickly when you ask for something	81%	83%
The ability to schedule an appointment in a way that you prefer	75%	77%
Express empathy and compassion	73%	75%
Follow-up communication after an appointment, hospital stay, procedure, etc. that is helpful, timely, and meets your expectations	73%	70%
A healthcare facility in which you can find your way around easily (e.g., clear signage, information, etc.)	67%	67%
Involve your family/care partners in planning how to take care of you	65%	65%
A healthcare facility that is convenient to access (e.g., close to home/work or online)	64%	65%
A healthcare environment that is quiet and peaceful	62%	64%
A healthcare facility that offers convenient parking	51%	53%
A healthcare facility that offers good food	31%	30%
The age of a healthcare facility (i.e., feels newer or older)	28%	30%
A healthcare facility that provides amenities such as on-demand television, room service, etc.	22%	22%



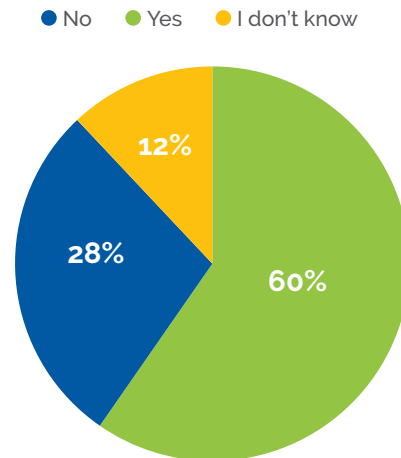
# THE KIND OF EXPERIENCE ONE HAS CONTINUES TO DICTATE CHOICES AND ACTIONS

In asking whether people had a positive or negative experience in the last year, an unexpected revelation in the data was the large number of people (76%) who reported NOT having a positive patient experience and the 60% who reported having a negative experience (Figures 11 and 12).

**Figure 11. Have you had what you consider to be a positive patient experience in the past 3 months?**

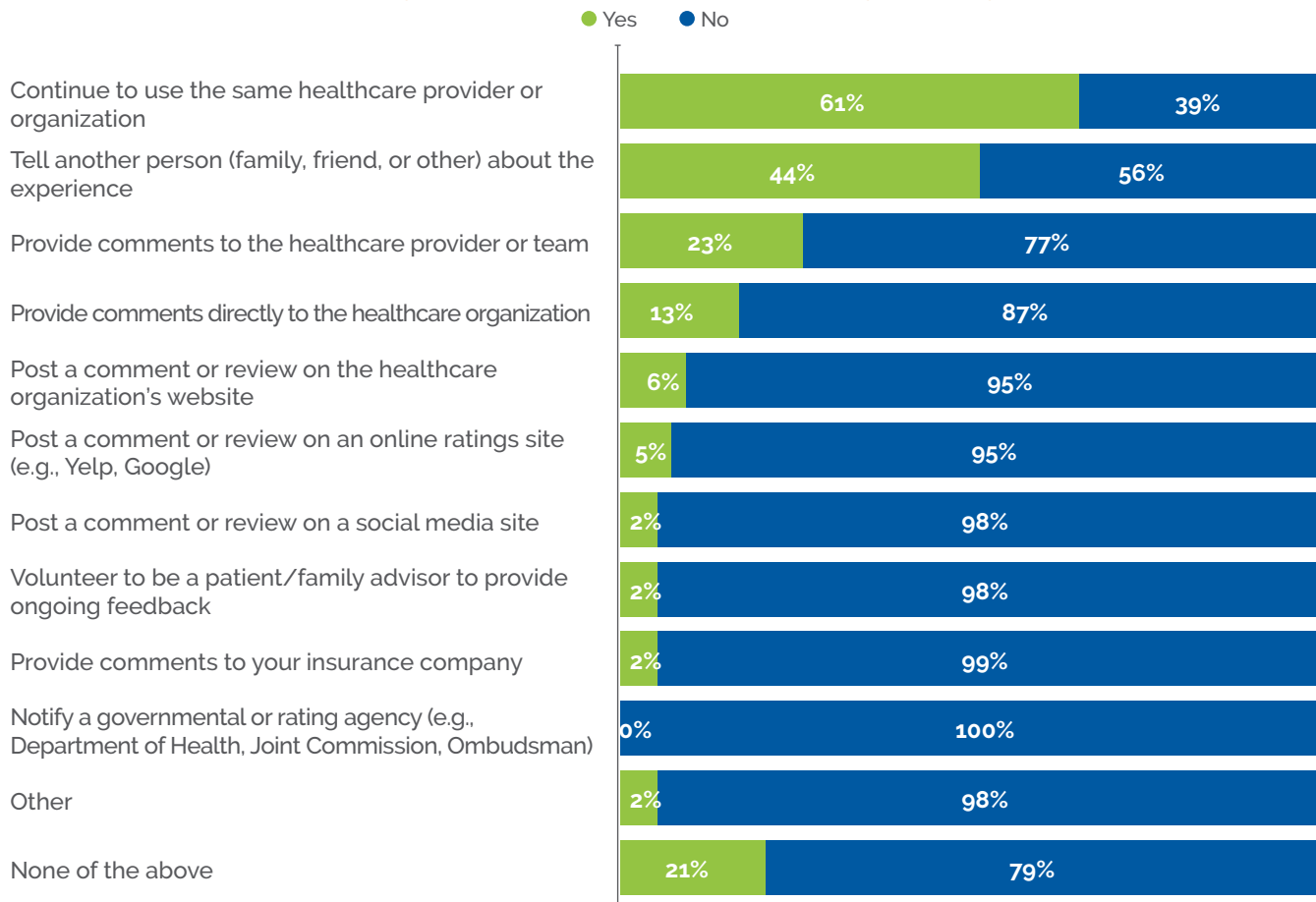


**Figure 12. Have you had what you consider to be a negative patient experience in the past 3 months?**



In both instances, the top items remained consistent with our last report. For both cases, good or bad, the greatest common action someone would take is to "tell another person." In the case of a positive experience, loyalty ranks first, as "continue to use the same organization" was rated higher (61%) than "sharing the story with others" at 44% (Figure 13).

**Figure 13. As a result of your positive patient experience, did you do any of the following?**

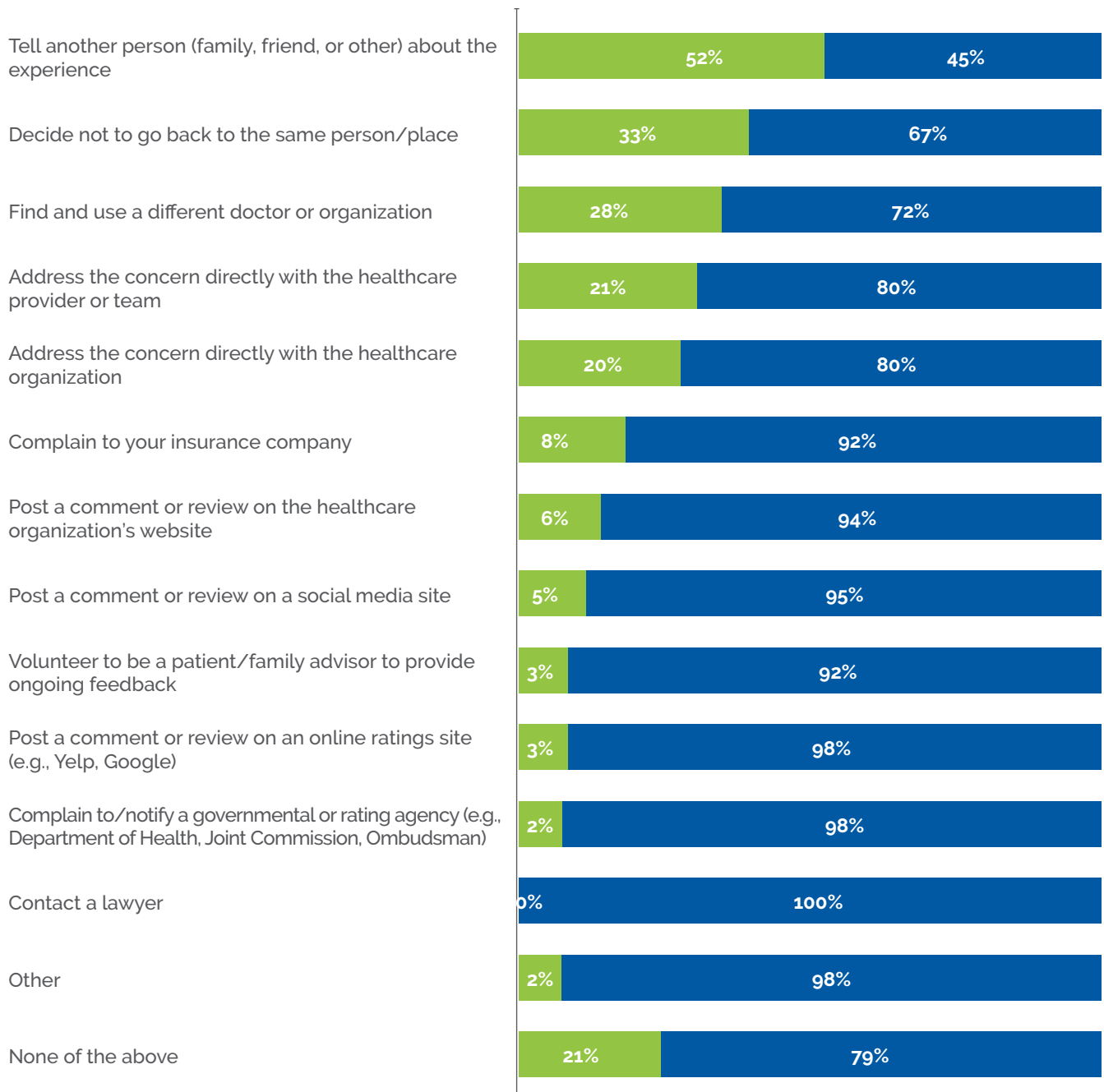


The opposite was seen in those with negative experiences, as “tell another person,” led the way with 52% selecting yes. This too was followed closely by the loyalty-related items “decide not to go back to the same place” (33%) and “find and use a different doctor or organization” (28%). In both good and bad experience cases, people’s willingness to address the concerns in some way with the organization where the experience occurred was rated lower in priority (Figure 14).

The bottom line is that consumers remain consistently clear on what matters to them and what constitutes good, positive and strong experiences. This is not a foundation-shifting discovery, but rather a foundation-setting reality that the items consumers consistently tell us are important need to be priority actions for healthcare organizations across the continuum of care.

**Figure 14. As a result of your negative patient experience, did you do any of the following?**

● Yes ● No



# HEALTHCARE IS FACING A CHALLENGE OF TRUST

The exploration of trust in healthcare is not new to our inquiry with PX Pulse and has been an expanding conversation within the broader global community at The Beryl Institute. With that, we hadn't put the direct question to consumers on their trust in healthcare.

The overall result: trust is important to consumers in healthcare, and healthcare has a trust issue. There are clear reasons why trust is wavering and definitive ideas from consumers on what can be done as well as address it.

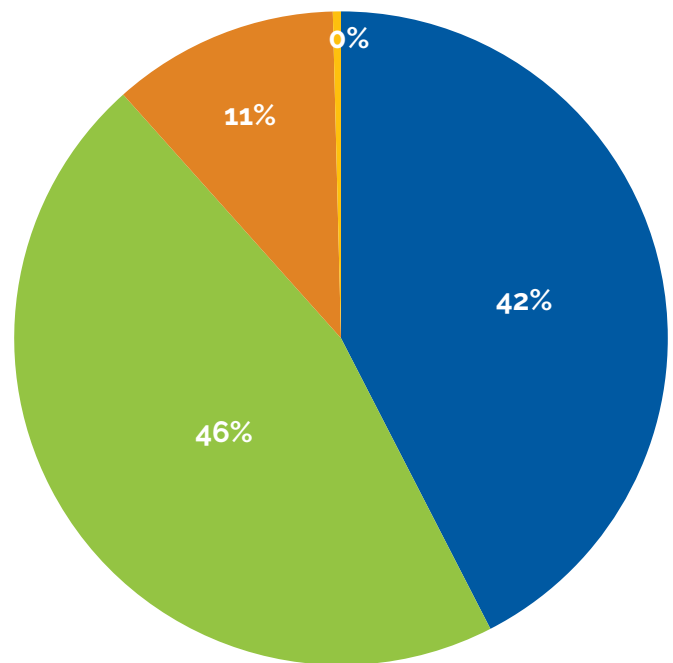
## ALMOST 90% OF CONSUMERS SEE TRUST AS "EXTREMELY IMPORTANT" OR "VERY IMPORTANT"

There is little doubt from our respondents that trust is important to people when engaging with the healthcare system (Figure 15). In looking at this response, it falls in line with what consumers identify as their top items of importance in experience, specifically:

- Listen to you
- Communicate clearly in a way you can understand
- Provide a clear plan of care and why they are doing it
- Take your pain seriously
- That I receive the appropriate level of care for my needs

The core ideas of effective, clear communication and planning and the seriousness and appropriateness expected from healthcare all underline why trust itself is important. People's healthcare encounters are when they are the most vulnerable, and trust is essential to success.

Figure 15. How important is trust to you when you in engaging engage with the healthcare system?



- Extremely Important
- Very Important
- Somewhat Important
- Not at all Important



## OVER TWO-THIRDS OF CONSUMERS SAY TRUST HAS DECLINED IN THE LAST TWO YEARS

In asking people, "To what extent do you agree that trust in healthcare has declined in the last two years?" 68% agreed or strongly agreed. It is clear there is a trust issue as people look to healthcare (Figure 16). This is an interesting data point when taken in conjunction with the falling quality and experience trends noted above. While there was a period of support and positive response to healthcare during the height of the pandemic, the factors now impacting healthcare have not only impacted people's view on how healthcare is doing but also on their trust of the system overall.

At the same time, while almost the same percentage, two-thirds, say their trust in healthcare has stayed the same in the last year, over 25% noted their own trust in healthcare got "worse" or "much worse" (Figure 17). This is an issue that healthcare will need to address and is something that goes beyond simple marketing solutions to rebuilding cultures in healthcare that provide trusting communication, positive work environments, stronger community outreach and more. The winds of this post-pandemic moment will require clear and unwavering actions on behalf of healthcare organizations. These are weights we already know from healthcare leaders that their organizations are carrying. This data supports a very clear and deliberate call to action.

## CONSUMERS' TRUST ERODED BY PERCEPTION HEALTHCARE SYSTEMS ARE ACTING OUT OF SELF-INTEREST

In looking to determine what has impacted trust, it is not surprising to see COVID-19 and pandemic-related issues as one of the top items with 44% saying these have done so to a large or some extent. Not far behind the pandemic is the issue of access, with 43% reporting issues about wait times for appointments or procedures and 39% reporting difficulty simply getting needed appointments as a challenge to rebuilding trust (Figure 18).

The most significant item to healthcare consumers was their selection of "Feeling as though the healthcare system acts out of self-interest rather than mine as a patient" as the top reason people's trust has eroded. Just shy of half of consumers (48%) identified this as the leading reason for their reduced trust in healthcare. This

Figure 16. To what extent do you agree that trust in healthcare has declined in the last two years?

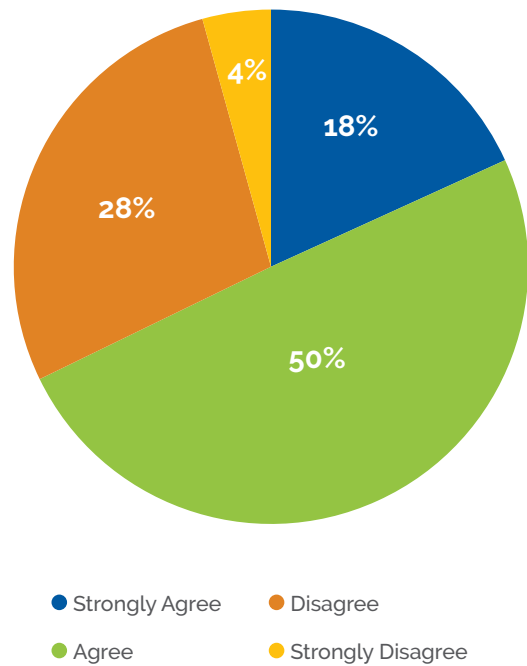
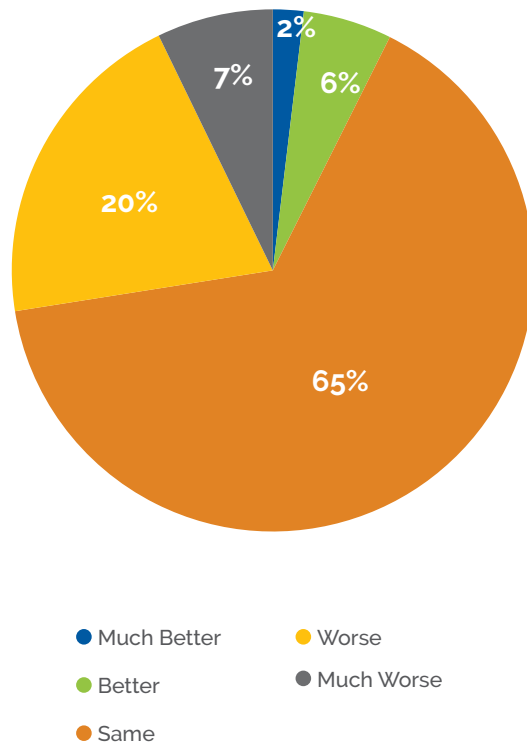


Figure 17. How much has your trust in the healthcare system changed in the last year?





underlines the work ahead for healthcare organizations as they reestablish relationships in their communities in this new COVID era. This also highlights the critical focus needed on the human experience. It will be in understanding and acting on what matters to patients, the healthcare workforce and the communities that healthcare organizations serve that a healing in trust can begin.

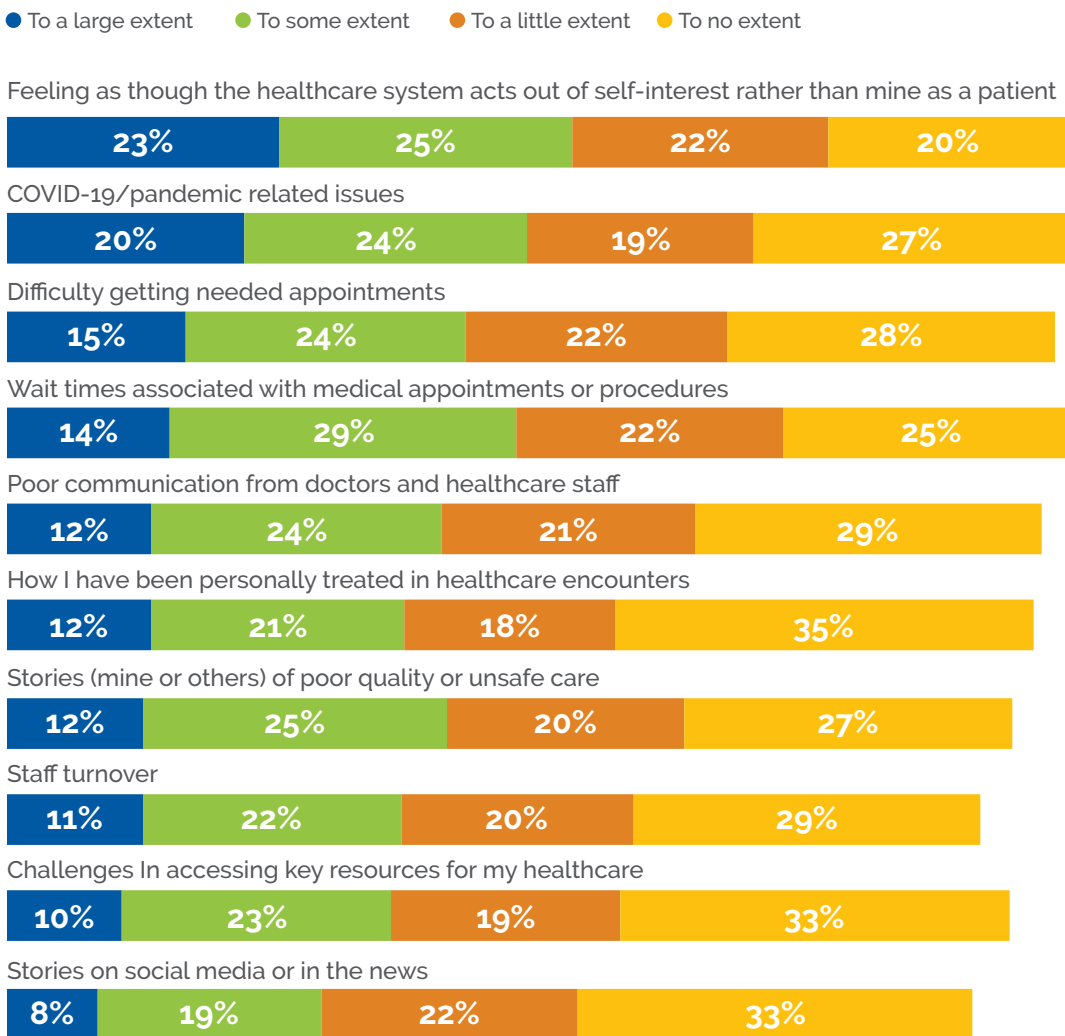
## ACCESS, RESPECT AND TRANSPARENCY ARE SEEN AS TOP AVENUES TO REBUILDING TRUST IN HEALTHCARE

Consumers could not be clearer in their responses as to what is most important to them as they help healthcare organizations think about what will heal the issues of trust overall. Three clear items stood out and reflected the earlier trends and items of importance to people (Figure 19).

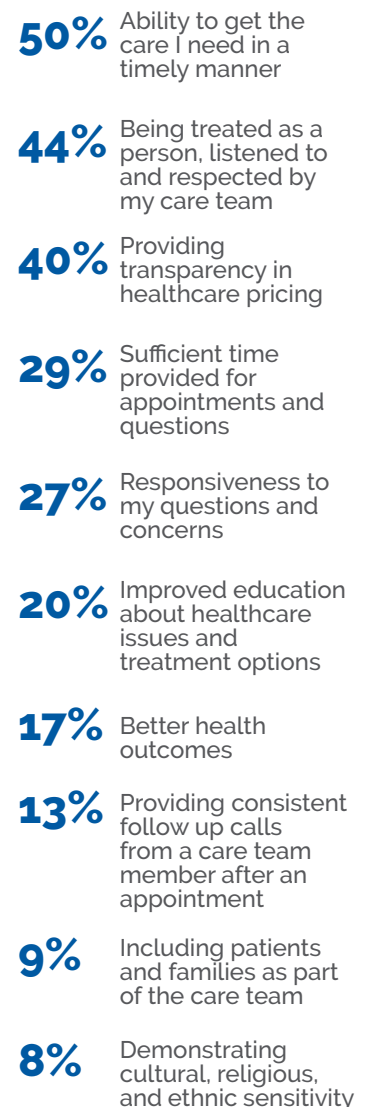
50% of respondents identified “ability to get the care I need in a timely manner” as the leading action needed to rebuild trust. This was followed by “being treated as a person, listened to and respected by my care team” at 44% and “providing transparency in healthcare pricing” at 40%. These ideas of making access easier and more timely, the personal nature of care we saw people seeking in previous responses (listen to me, respect me) and the need for greater transparency in cost are all clear and measurable opportunities for healthcare to take on.

In many ways, this exploration of trust reaffirms so much of what has been seen in this PX Pulse and many issues before it. It also provides a clear path for healthcare organizations to reaffirm a commitment to experience and rebuild trust and connection with healthcare consumers. It is now up to healthcare leaders to follow these ideas as they seek to navigate the rapid currents of today’s healthcare ecosystem.

**Figure 18. To what extent have the following issues eroded your trust in healthcare?**



**Figure 19. What should be done to help rebuild trust in healthcare?**



# KEY TAKEAWAYS

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

- Consumers' perception of quality of healthcare slides 6 percentage points to its lowest point since we first started tracking.
- The perception of experience has also slipped to an all-time low at 64% reflecting it as "Very good" or "Good."
- Cost continues to be top of mind for and most important to the U.S. consumer, led by out-of-pocket costs (41%), affordable insurance options (39%) and cost of premiums (36%) as the most important healthcare issues.
- The importance of experience slips slightly. While still high with 92% of respondents saying this is "Extremely important" or "Very important" to them, this seems reflective of the overall concerns with the healthcare system at this moment.
- Comfort in seeking care continues to rise across all settings as people regain confidence in returning to healthcare.

As we reexamined what is most important to healthcare consumers in this release, we also saw:

- "Listen to you" and "Communicate clearly in a way you can understand" remain the top two items of importance to consumers when having a good experience.
- "Take your pain seriously" and "Treat you with courtesy and respect" saw the greatest gains in consumer rating, followed closely by "Provide

a clear plan of care and why they are doing it" and were all were part of the top 5 items in importance to consumers.

- Open responses to consumers' view of a positive experience reflected words such as caring, understanding, friendly, listened to, knowledgeable and clear, while those of negative experiences were rushed, rude, wait, dismissive and long.
- In both cases of good (44%) and bad (52%) experiences, people responded they would tell others. In the case of bad experiences, a third (33%) would not come back, while those having positive experience would continue to use the same healthcare organization 61% of the time.

Finally, a challenge of trust was revealed that will need to be addressed by healthcare organizations:

- Almost 90% of consumers see trust as "Extremely important" or "Very important", while 68% say trust has declined in the last two years.
- "Feeling as though the healthcare system acts out of self-interest rather than mine as a patient" is the top reason people's trust has eroded with 48% selecting this issue.
- Addressing the ability to get care in a timely manner (50%), listening to and treating people with respect (44%) and providing transparency in pricing (40%) are the top avenues identified by consumers to rebuilding trust in healthcare.

At the opening of this report, we reflected on the evolution of trends we are seeing in the experience movement. Yet at the same time, while issues and opportunities have clearly been realized, the items that are important and the actions to address them may never be clearer.

Consumers in healthcare want to feel listened to and they want to understand their information and plans of care. In our ability to do this, we help them show that our healthcare organizations are there for patients, families and care partners and the communities our healthcare organizations serve.

While diminishing numbers in quality, experience and trust may feel disheartening, they reflect the larger realities in the world that healthcare now operates. What is evident is that not only is the path forward clear, but the opportunities healthcare has in front of it are bright. In keeping things simple, in honoring the person in front of us, in living the central idea that in healthcare we are human beings caring for human beings and then in executing on plans to reinforce those fundamentals, the opportunities for healthcare's future far outweigh the challenges in our way. It is now up to each of us to choose this clear focus and act.

