The Beryl Institute - Ipsos PX Pulse

Consumer Perspectives on Patient Experience in the U.S.

JULY 2023

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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

Welcome to the 13th release of The Beryl Institute – Ipsos PX Pulse as we continue to follow the trends on consumers' perspective of healthcare and the human experience they have when seeking, accessing and engaging in care. This release represents a continued inquiry into the core items we have been exploring since the launch of PX Pulse in early 2020.

In addition to tracking core trends, in this issue we return to a couple of the questions we reported in **November 2022** about trust in the healthcare system.

The insights of PX Pulse continue to afford a view of how consumers view healthcare's most basic deliverables – quality and experience – while reinforcing the actions and efforts that support and impact healthcare organizations' ability to act on these issues.

As we say with each release, we believe these findings help us reflect on how we can more effectively operationalize healthcare and move forward with confidence in knowing what truly matters to those we serve every day. Our hope remains that this is not simply data to read but information on which to act to ensure the best experience for all.

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, 1,003 completed surveys were obtained in the United States through the KnowledgePanel for this quarter's release. The survey was fielded from May 18-31, 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. As noted above, this quarter we focused on our core question set, while returning to two central questions in our inquiry on trust in the healthcare system first conducted in September 2022.

The core questions we have asked since the launch of PX Pulse include:

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 QUESTIONS

Overall perspectives on both quality and experience slip slightly.

Ratings of healthcare quality have been declining since the end of last year and are now 5% lower than December, 3% lower than our last release and at their second lowest point since we started tracking this question (Figure 1). Perception of the overall care experience also dropped 4% since March, returning to the lowest rating received since we began tracking (Figure 2).

Figure 1. Quality of Healthcare in America (% "Very Good" + "Good")

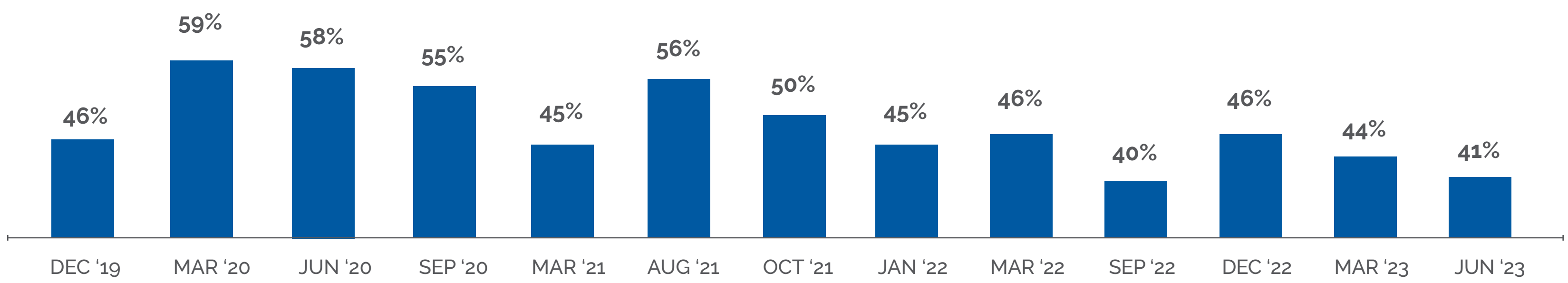
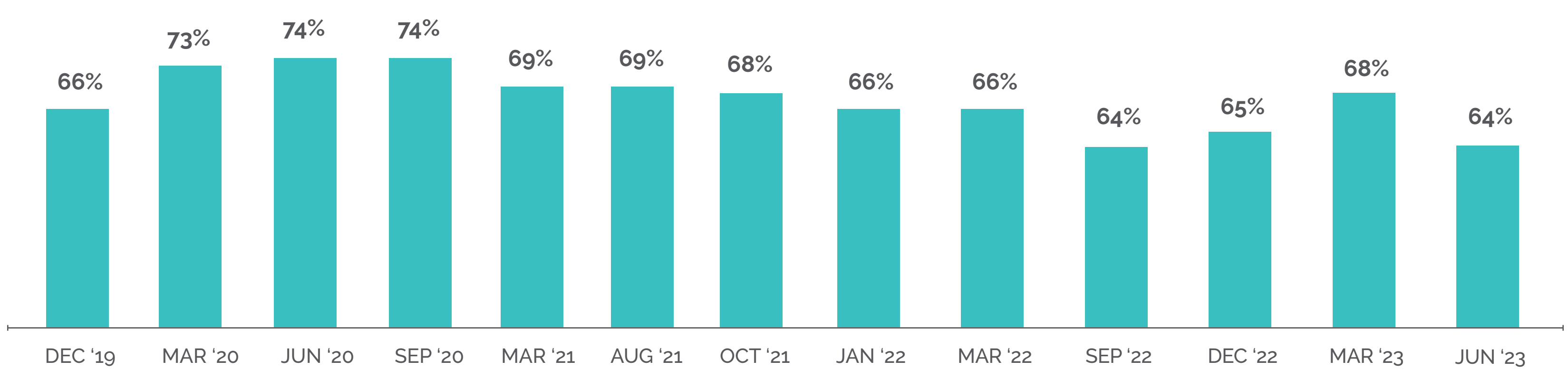


Figure 2. Overall Care Experience in the Past 12 Months (% "Very Good" + "Good")



Cost-related issues remain of greatest importance to consumers, but a subtle climb is seen in the importance of how people are treated.

Affordable insurance options, out-of-pocket costs and insurance premiums continue to hold the greatest importance to people (Figures 3 and 4). When asking people to select the top three most important healthcare issues, "Out-of-pocket healthcare costs" jumped 4% to take the top spot. The other item showing the greatest increase was "treatment of people by the healthcare system," Which increased 2% since the last quarter. Beyond the continued concerns around cost, people reinforce they are seeking experience and quality. This presents an important opportunity for healthcare organizations, as both quality and overall experience had some of their lowest ratings since we started tracking these items in PX Pulse.

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

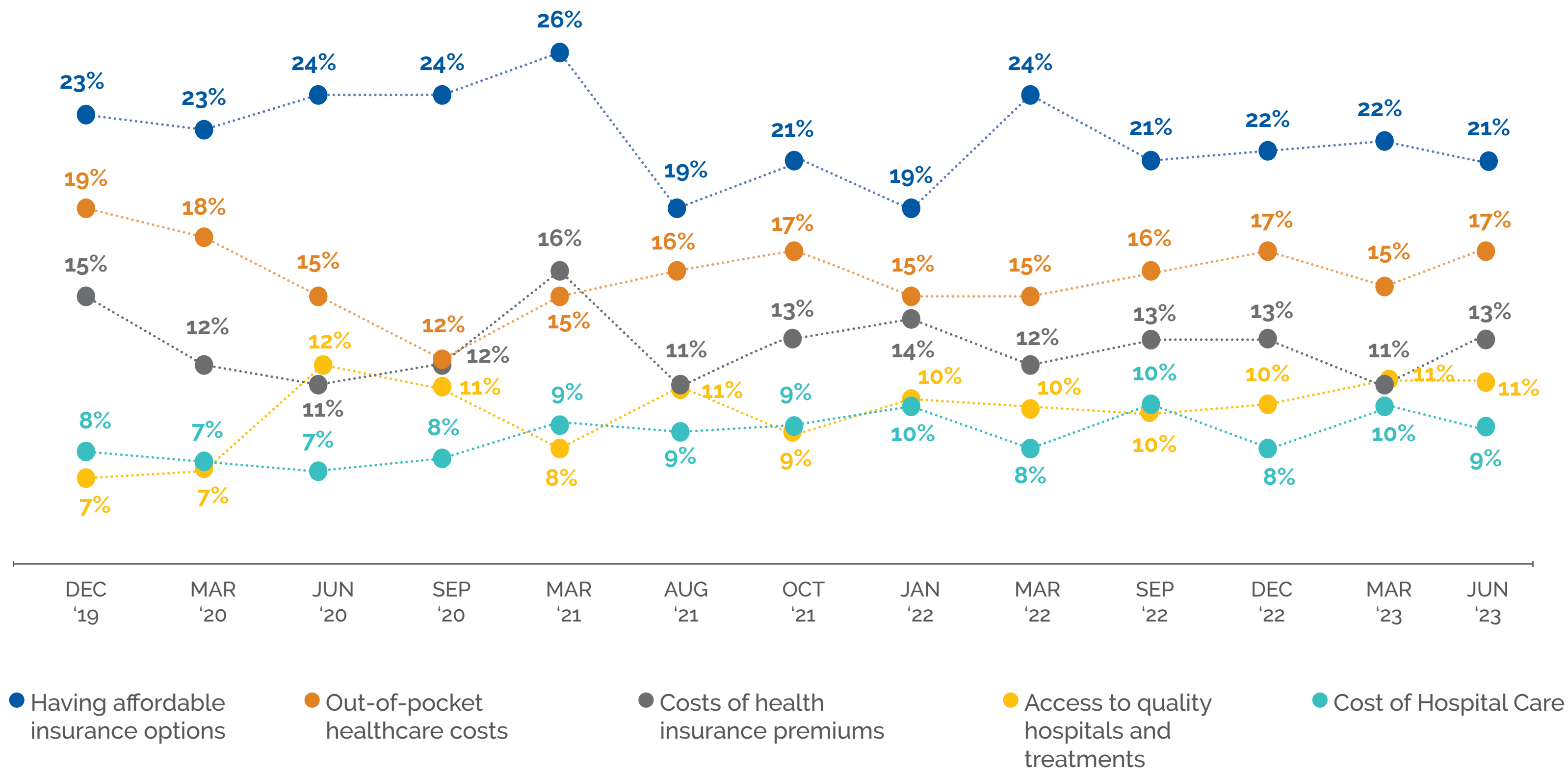
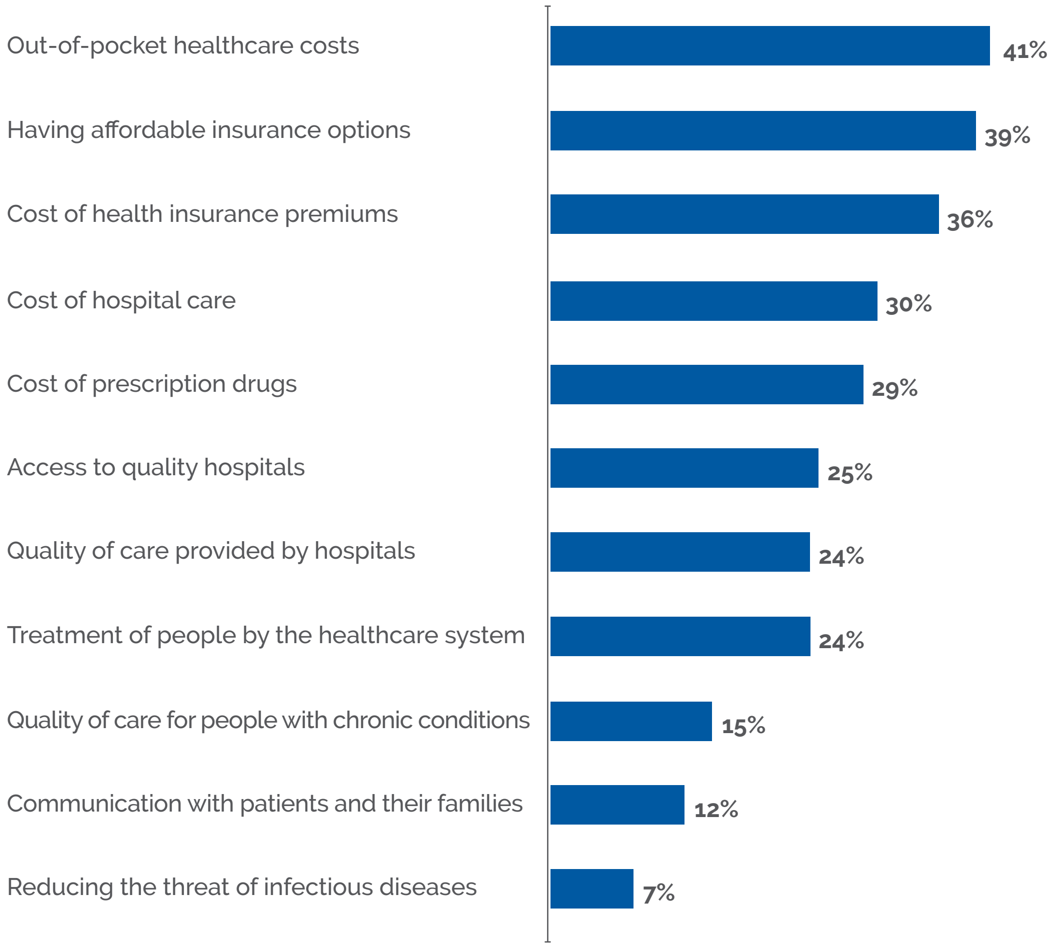


Figure 4. Which healthcare issues are most important to you? (Top 3)



Importance of experience remains high with the reasons why experience is important holding steady.

The importance of having a good experience remains high, holding steady at 95% (Figure 5). The ranking of reasons why patient experience is important has not changed since last quarter and continue to focus on fundamental human factors, such as health and well-being, physical needs, positive outcomes, being treated with respect and being addressed as a person (Figure 6). Looking at the trends of these top items over the lifetime of PX Pulse, the last three years serve to reinforce these are critical issues that healthcare organizations must work to elevate as they to provide and communicate about the experience they can create for their patients (Figure 7).

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

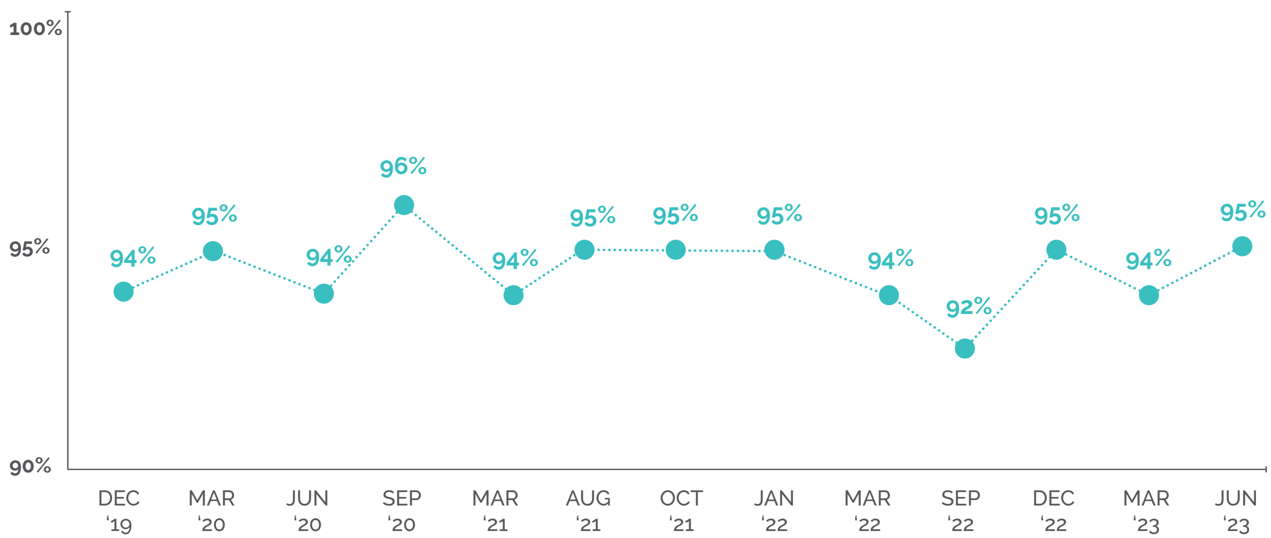
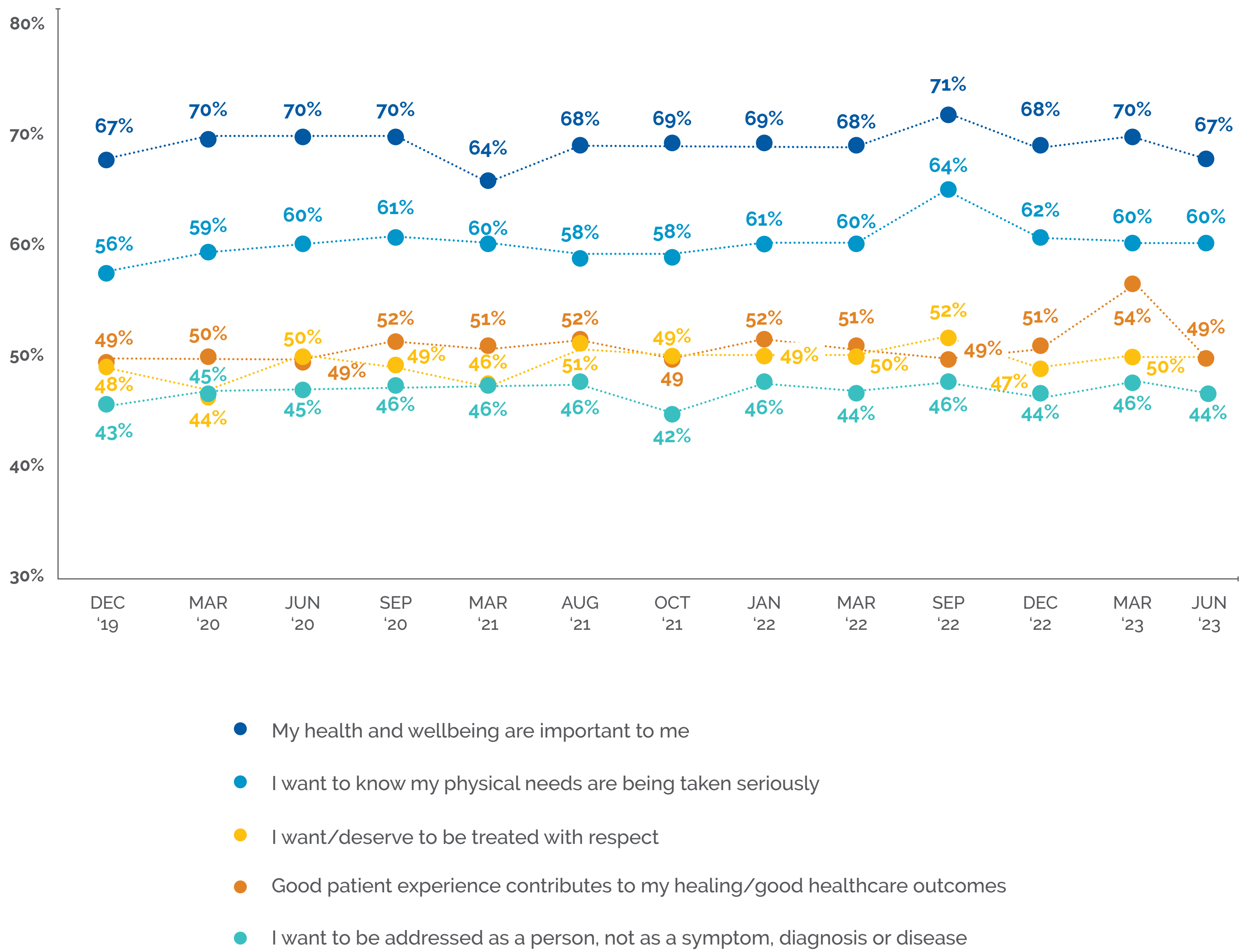


Figure 6. Why is having a good patient experience important to you?

- **67%** My health and wellbeing are important to me
- **60%** I want to know my physical needs are being taken seriously
- **49%** Good patient experience contributes to my healing/good healthcare outcomes
- **49%** I want/deserve to be treated with respect
- **44%** I want to be addressed as a person, not as a symptom, diagnosis or disease
- **36%** It will influence how I make healthcare decisions in the future
- **35%** I spend my money on this
- **33%** My time matters
- **20%** I see myself as a customer

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



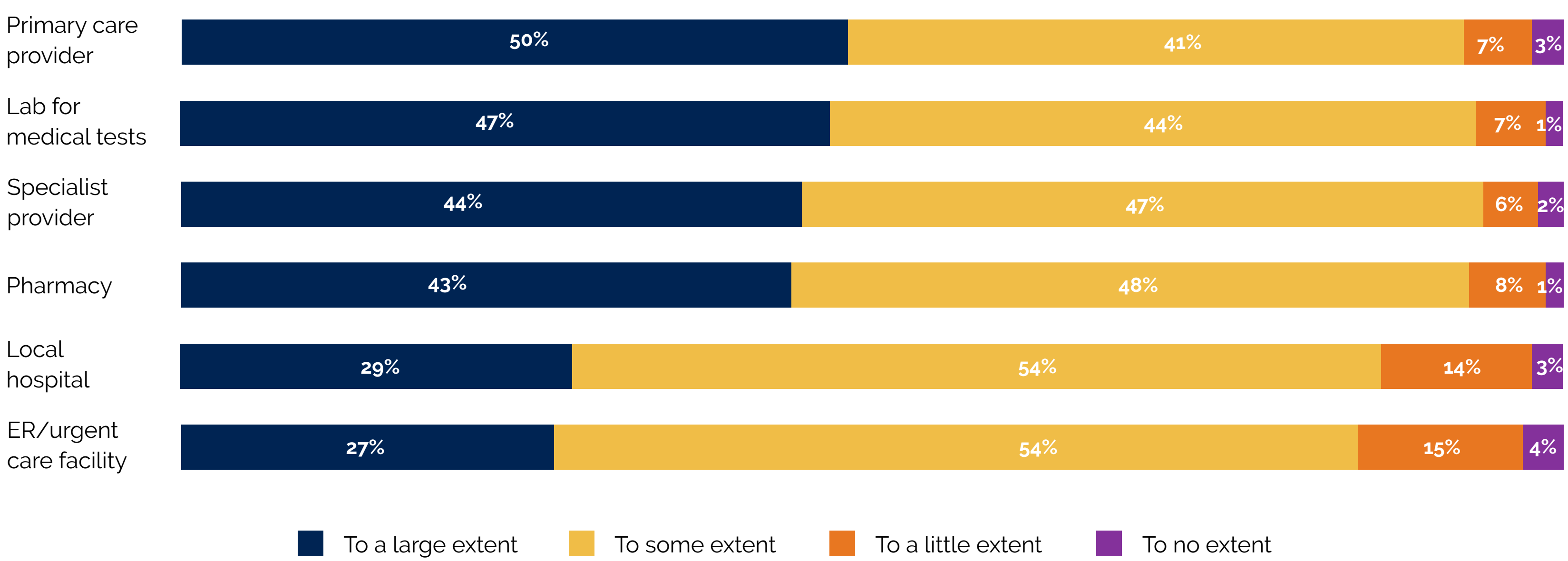
AN INQUIRY INTO TRUST

As noted above, in this release we returned to investigating trust in healthcare, building on the data reported in the **November 2022 PX Pulse**. First, we asked about trust in certain segments of the healthcare ecosystem, and second, we asked about the issues impacting people's level of trust in healthcare.

Primary and specialty care settings are more trusted than hospitals and urgent care.

While all settings explored in this release had over 80% of people trusting healthcare services in each of the settings "to a large extent" or "to some extent," trust in hospitals and urgent care settings was less than that of other settings (Figure 8). This difference in the extent of trust in hospitals and urgent care settings may make sense given the types of care received and the differences in the physical aspects of the facilities (i.e., having higher acuity, requiring greater urgency, carrying greater risk, and being bigger, more impersonal care settings). These two settings are also more transactional environments where time to build trust may not be as readily available. This data helps us see that there remains an opportunity to build pathways to greater trust even in the shorter durations of care provided in these settings.

Figure 8. At this time, to what extent do you trust the following healthcare services?

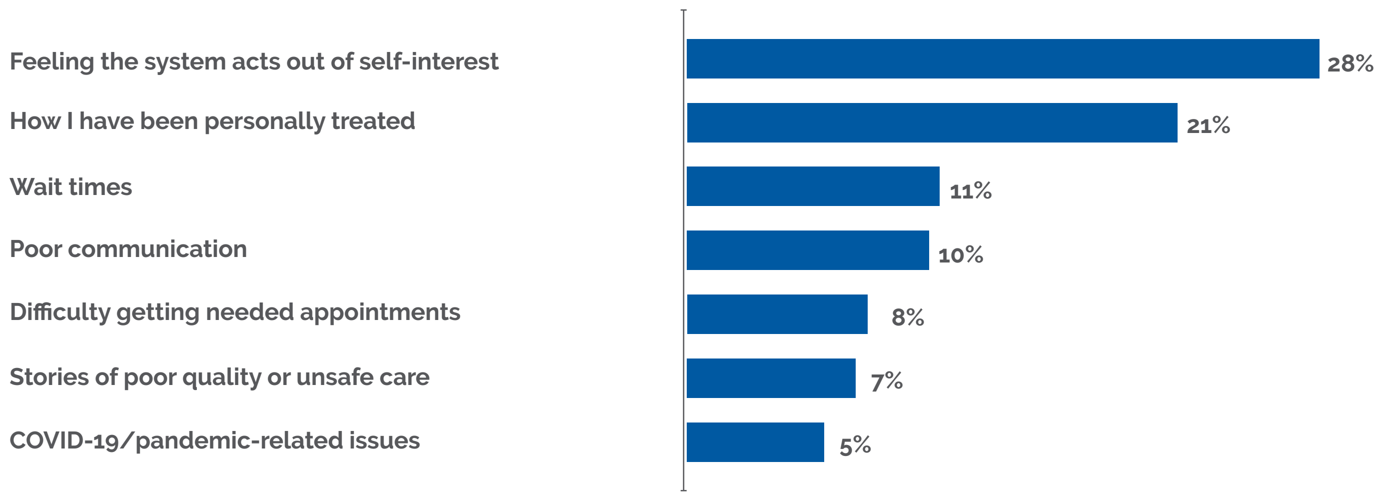


Health system self-interest and how people are personally treated stand out as top issues impacting trust.

In our **November 2022** release of PX Pulse, we asked what issues have eroded trust in healthcare and what should be done to rebuild it. At that time, the top item that people identified as eroding trust was "feeling as though the health system acts in its own self-interest rather than mine as a patient." In asking people what the health system should do, people offered, first, being able to get care in a timely manner, followed closely by being treated like a person.

With these earlier results, it is not surprising that we find the two most impactful issues on trust remain as "feeling the system acts out of self-interest" and "how I have been personally treated. (Figure 9). The continued elevation of these issues in the data provides some insights that healthcare organizations must do more to effectively and emphatically show they care about those they serve, and they must do so by understanding individual needs so that they can treat people in the ways they want to be treated. The findings in our continued exploration of trust reinforce the importance of experience to people and why it is important to them. These are priorities healthcare organizations cannot afford to turn away from.

Figure 9. From the following list, which issue has the greatest impact on your trust in healthcare? (% selected)



KEY TAKEAWAYS

This release of PX Pulse shows some subtle shifts, but even stronger trends. Following the trends over the last three years has reinforced what is of consistent importance to people engaging in healthcare.

This release offers a few key insights:

- Perceptions of quality and experience are slowly declining. These declines are important for healthcare organizations to consider and reaffirm why a commitment to experience should not be a question and can have significant positive impact.

- Cost-related issues remain of greatest importance to consumers.

- The consistency with which the top reasons why experience is important is revealing and should serve as a guide to help healthcare organizations prioritize their actions and investments, particularly in tough economic times. Healthcare organizations can't afford to lose sight of supporting people's interest in their own health and well-being, their physical needs and their desire for positive outcomes, while being treated with respect and being addressed as a person. These are the critical levers that will ensure experience can be elevated and reinforce how quality elements are truly central to the overall experience organizations provide.

- While trust in healthcare settings is high, finding ways to continue to build trust by creating stronger relationships with their patients, providers and the communities in which they operate will be important to improving broader trust in the healthcare system. Concerns about the healthcare system acting out of self-interest may be addressed by a strengthened commitment to the human experience.

This issue underlines both the very real challenges healthcare organizations face and the opportunities they must address with a human-centered lens. Improving experience is no longer a nice thing to do, but an expectation and critical part of why people will continue to choose a healthcare organization in the future.

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