The sum of all interactions, shaped by an organization’s culture, that influence patient perceptions across the continuum of care.

- The Beryl Institute
The Beryl Institute is the global community of practice dedicated to improving the patient experience through collaboration and shared knowledge.
Our Commitment

As a community, we commit to:

• Elevating the importance of experience across all care settings
• Generating, collecting and sharing ideas and proven practices
• Engaging a broad range of voices and views
• Putting patients, families and care partners first
• Recognizing the value of the entire healthcare team
• Reinforcing experience encompasses quality, safety, service, cost, and outcomes
Consumer Perspectives on Patient Experience 2018:
Insights and Opportunities for Action
Our Agenda

- Welcome, introductions and overview
- Recap of key headlines
- Panel and participant discussion
- Final reflections from panel
- Closing comments
Our Panel

Hala Durrah
Patient/Family Engagement Advocate

Debbie Landers
Innovation and Product Leader, Studer Group

Sean Rodriguez
Vice President & Advisor to the Office of Experience, Engagement and Organizational Development, Hartford HealthCare

Jason A. Wolf, PhD, CPXP
President, The Beryl Institute
Founding Editor, PX Journal
Consumer Perspectives on Patient Experience 2018

KEY HEADLINES - RECAP
Research Partner

Corporate Partner
Purpose & Methodology

- The overall purpose of this study was to determine how consumers perceive patient experience (PX) and how this fits into their broader set of expectations around health and healthcare delivery.

- The Beryl Institute, SMG Catalyst, and Studer Group collaborated on this first-of-its-kind research initiative.

- Study grounded in the voices of consumer, framed by initial focus group

- Online survey process: Approximately 30 questions

- Survey period: February 9-14, 2018

- Unless otherwise noted, scores presented are top-box.
Respondents

2,000 individuals in 5 countries, spanning demographic and economic levels.

Age Distribution:
- 18-24: 7%
- 25-34: 19%
- 35-44: 20%
- 45-54: 18%
- 55-64: 20%
- 65-74: 15%
- 75+: 3%

Gender:
- Female: 51%
- Male: 48%

Gender Variant/Non-Conforming: 1%

Healthcare Employee?
- Yes: 10%
- No: 90%

Healthcare Encounters in Past Year:
- None: 12%
- 1-2: 34%
- 3-5: 32%
- 6-10: 13%
- 11+: 9%
Patient Experience is Important

6 of 10 believe the patient experience is extremely important (59%)

3 of 10 believe the patient experience is very important (32%)

<1 of 10 believe the patient experience is somewhat important (8%)
Q: Why is having a good patient experience important to you? (Check all that apply.) n=1996

About my health

- My health and wellbeing are important to me 78%
- I want to know that my physical needs are being taken seriously 72%
- Good PX contributes to my healing/good healthcare outcomes 69%
- I want/deserve to be treated with respect 68%
- I want to be addressed as a person, not as a symptom, diagnosis, or disease 65%
- It will influence how I make healthcare decisions in the future 51%

About how you treat me

- My time matters 45%
- I am spending my money on this 38%
- I see myself as a customer 35%

About being a customer

More important to Non-US respondents

US Non-US
Time 65% 72%
Money 44% 33%

U.S. Non-U.S.
Time 49% 41%
Money 44% 33%

Q: Why is PX Important?
And WHAT is Important?

- That my health ultimately improves: 69%
- That my care is delivered safely: 68%
- That I achieve positive health outcomes: 66%
- That I received the appropriate level of care for my needs: 65%
- That my care is delivered with a focus on quality: 62%

% Extremely Important: 95%
Consumer Perspectives on Patient Experience 2018

PX DEFINED
<table>
<thead>
<tr>
<th>PEOPLE</th>
<th>PROCESS</th>
<th>PLACE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listens to you</td>
<td>Schedule an appt within a reasonable time period</td>
<td>Clean and comfortable</td>
</tr>
<tr>
<td>Communicates clearly</td>
<td>Discharge process in which your treatment plan</td>
<td>Quiet and peaceful</td>
</tr>
<tr>
<td>Treats you with courtesy and respect</td>
<td>and/or next steps in care are clearly explained</td>
<td>Convenient to access</td>
</tr>
<tr>
<td>Gives you confidence in their abilities</td>
<td>Transitioning health info between providers</td>
<td>Easy to find your way around</td>
</tr>
<tr>
<td>Takes your pain seriously</td>
<td>Billing process that is clear, understandable and respectful</td>
<td>Offers convenient parking</td>
</tr>
<tr>
<td>Provides a clear plan of care and why</td>
<td>Discharge process in which you are provided information on such items as medication, side effects, etc.</td>
<td>Offers good food</td>
</tr>
<tr>
<td>Asks questions and understand your needs</td>
<td>Discharge process to ask questions for clarification</td>
<td>Provides amenities</td>
</tr>
<tr>
<td>Partners with you in making health decisions</td>
<td>Waiting time to be seen that you feel is reasonable</td>
<td>Age of a healthcare facility</td>
</tr>
<tr>
<td>Responds quickly when you ask</td>
<td>Way to easily access your medical info or test results</td>
<td></td>
</tr>
<tr>
<td>Expresses empathy and compassion</td>
<td>Ability to schedule an appointment in a way that you prefer</td>
<td></td>
</tr>
<tr>
<td>Involves your family/friends in care planning</td>
<td>Follow-up communication after an appt that is helpful, timely and meets your expectations</td>
<td></td>
</tr>
</tbody>
</table>
Consumer Priorities

**PEOPLE** 56%

**PROCESS** 48%

**PLACE** 34%

*Average Extremely Important percentage scored in each category*
What Shapes Experience

Highest Ranked

71% Listen to you
67% Communicate clearly in a way you can understand
65% Treat you with courtesy and respect
64% Give you confidence in their abilities
63% Take your pain seriously

Lowest Ranked

33% Age of the healthcare facility
31% Facility that provides amenities
26% Facility that offers good food
21% Involve family and friends in planning how to take care of you
20% Facility that offers convenient parking

% Extremely Important
## Highest Ranked PX Components

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Extremely Important</th>
<th>Very + Extremely Important</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Listen to you</td>
<td>71%</td>
<td>95%</td>
<td>People</td>
</tr>
<tr>
<td>2</td>
<td>Communicate clearly in a way you can understand</td>
<td>67%</td>
<td>95%</td>
<td>People</td>
</tr>
<tr>
<td>3</td>
<td>Treat you with courtesy and respect</td>
<td>65%</td>
<td>95%</td>
<td>People</td>
</tr>
<tr>
<td>4</td>
<td>Give you confidence in their abilities</td>
<td>64%</td>
<td>94%</td>
<td>People</td>
</tr>
<tr>
<td>5</td>
<td>Take your pain seriously</td>
<td>63%</td>
<td>93%</td>
<td>People</td>
</tr>
<tr>
<td>6</td>
<td>A healthcare environment that is clean and comfortable</td>
<td>62%</td>
<td>94%</td>
<td>Place</td>
</tr>
<tr>
<td>7</td>
<td>Provide a clear plan of care and why they are doing it</td>
<td>59%</td>
<td>93%</td>
<td>People</td>
</tr>
<tr>
<td>8</td>
<td>Ask questions and try to understand your needs and preferences</td>
<td>56%</td>
<td>92%</td>
<td>People</td>
</tr>
<tr>
<td>9</td>
<td>The ability to schedule an appointment or procedure within a reasonable time period</td>
<td>52%</td>
<td>93%</td>
<td>Process</td>
</tr>
<tr>
<td>10</td>
<td>A discharge/check out process in which your treatment plan and/or next steps in care are clearly explained</td>
<td>52%</td>
<td>92%</td>
<td>Process</td>
</tr>
</tbody>
</table>
## Middle Ranked PX components

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Extremely Important</th>
<th>Very + Extremely Important</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>An understandable and easy process for transitioning your health information between care providers</td>
<td>51%</td>
<td>90%</td>
<td>Process</td>
</tr>
<tr>
<td>12</td>
<td>A billing process that is clear, understandable and respectful</td>
<td>51%</td>
<td>89%</td>
<td>Process</td>
</tr>
<tr>
<td>13</td>
<td>Partner with/engage you in making your health decisions</td>
<td>50%</td>
<td>89%</td>
<td>People</td>
</tr>
<tr>
<td>14</td>
<td>A discharge/check out process in which you are provided information (electronically or paper) on such items as medication, side effects, pain management, etc.</td>
<td>49%</td>
<td>89%</td>
<td>Process</td>
</tr>
<tr>
<td>15</td>
<td>A discharge/check out process in which you feel you can ask questions for clarification</td>
<td>48%</td>
<td>90%</td>
<td>Process</td>
</tr>
<tr>
<td>16</td>
<td>A waiting time to be seen that you feel is reasonable</td>
<td>48%</td>
<td>90%</td>
<td>Process</td>
</tr>
<tr>
<td>17</td>
<td>Respond quickly when you ask for something</td>
<td>45%</td>
<td>87%</td>
<td>People</td>
</tr>
<tr>
<td>18</td>
<td>A way to easily access your medical information or test results (e.g., open access to medical records, patient portal, etc.)</td>
<td>44%</td>
<td>86%</td>
<td>Process</td>
</tr>
<tr>
<td>19</td>
<td>Express empathy and compassion</td>
<td>43%</td>
<td>83%</td>
<td>People</td>
</tr>
<tr>
<td>20</td>
<td>The ability to schedule an appointment in a way that you prefer (e.g., using phone, online, app, etc.)</td>
<td>42%</td>
<td>81%</td>
<td>Process</td>
</tr>
<tr>
<td>21</td>
<td>Follow-up communication after an appointment, hospital stay, procedure, etc., such as a call from a nurse or doctor that is helpful, timely and meets your expectations</td>
<td>38%</td>
<td>81%</td>
<td>Process</td>
</tr>
</tbody>
</table>
## Lowest Ranked PX components

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Extremely Important</th>
<th>Very Extremely Important</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>A healthcare environment that is quiet and peaceful</td>
<td>40%</td>
<td>80%</td>
<td>Place</td>
</tr>
<tr>
<td>23</td>
<td>A healthcare facility that is convenient to access (e.g. close to home/work or online)</td>
<td>36%</td>
<td>77%</td>
<td>Place</td>
</tr>
<tr>
<td>24</td>
<td>A healthcare facility in which you can find your way around easily (e.g. clear signage, information, etc.)</td>
<td>35%</td>
<td>79%</td>
<td>Place</td>
</tr>
<tr>
<td>25</td>
<td>A healthcare facility that offers convenient parking</td>
<td>33%</td>
<td>71%</td>
<td>Place</td>
</tr>
<tr>
<td>26</td>
<td>Involve your family/friends in planning how to take care of you</td>
<td>31%</td>
<td>68%</td>
<td>People</td>
</tr>
<tr>
<td>27</td>
<td>A healthcare facility that offers good food</td>
<td>26%</td>
<td>58%</td>
<td>Place</td>
</tr>
<tr>
<td>28</td>
<td>A healthcare facility that provides amenities such as on-demand television, room service, etc.</td>
<td>21%</td>
<td>49%</td>
<td>Place</td>
</tr>
<tr>
<td>29</td>
<td>The age of a healthcare facility (i.e., feels newer or older)</td>
<td>20%</td>
<td>52%</td>
<td>Place</td>
</tr>
</tbody>
</table>
Consumers support integrated perspective of PX
Describing Positive Experience
Describing Negative Experience

long wait disappointed frustrating
horrible unprofessional sad long
uncaring rude upsetting
not listened to painful incompetent impatient
did not listen anger care
staff doctor bad dirty
ignored time stressful
rushed slow dismissive
Consumer Perspectives on Patient Experience 2018

IMPLICATIONS OF PX
Positive Experiences are Lasting

Have you or someone you know recently had a positive patient experience?
- 74% Yes
- 26% No

Have you or someone you know recently had a negative patient experience?
- 63% Yes
- 37% No
Experience Has Tangible Implications

Positive experience

- Tell another person about the experience: 70%
- Continue to use the same doctor or organization: 73%

Stay = Loyalty

Feedback

- Provide comments to healthcare provider or team: 29%
- Provide comments directly to the org: 22%

Negative experience

- Decide not to go back to the same person or place: 43%
- Find & use a different doctor or organization: 37%
- Share the good & bad: 76%
- Leave = Leakage

Q: As a result, did you/did they do any of the following? [Check all that apply.] (n=1235)

- Decide not to go back to the same person or place: 43%
- Find & use a different doctor or organization: 37%
- Share the good & bad: 76%
- Leave = Leakage

Stay = Loyalty

Feedback

- Provide comments to healthcare provider or team: 29%
- Provide comments directly to the org: 22%
PX Significant to Healthcare Choices

- Extremely significant: 55%
- Somewhat significant: 36%
- Minimally significant: 7%
- Not at all significant: 1%
PX Important in Decisions Across the Continuum of Care

- Extremely important
- Very important
- Somewhat important

- Pharmacy: 38%
- Insurance company: 44%
- Home health provider: 47%
- Hospice: 49%
- Urgent care center: 50%
- Nursing home/senior living center: 50%
- Long-term care facility: 55%
- Surgery center: 57%
- Specialist: 59%
- Hospital: 59%
- Primary care doctor: 64%
Recommendations & Referrals Lead Healthcare Decision-making

- **Recommendation of family or friends**: 72%
- **Referral from another physician or provider organization**: 70%
- **Formal published rankings**: 28%
- **Awards or designations the organization or provider have received**: 28%
- **Online ratings (via neutral sites such as Yelp, Google, etc.)**: 27%
- **Comments or information gathered via social media**: 23%
- **Online ratings (via the organization’s website)**: 22%

Pulled higher by:

- **Boomers**:
  - Millennials: 58%
  - Generation X: 68%
  - Baby Boomers: 80%

- **Millennials**:
  - Millennials: 38%
  - Generation X: 26%
  - Baby Boomers: 20%
General reactions
Panel & Participant Discussion

Hala Durrah  Debbie Landers  Sean Rodriguez  Jason A. Wolf, PhD, CPXP

What do you see as the implications for your organization and for healthcare overall?

- Panel discussion
- Reaction/discussion with participants
How should and/or how will this inform your actions and efforts moving forward?

- Panel discussion
- Reaction/discussion with participants
REFLECTIONS & CLOSING COMMENTS
Consumers confirm patient experience **extremely important** to them overall.

Far greater similarities than differences in consumer perspective both globally and generationally.

Consumers affirm **human interactions most important** to them in assessing patient experience, followed by processes and then place.

Of greatest importance to consumers is how they are **connected with as human beings** with a focus on listening, communicating clearly and being treated with dignity and respect.
Consumers confirm they see experience as the integration of all they encounter in healthcare from quality and safety to service, cost and more.

People easily recall their healthcare experiences, especially those positive in nature, and the top thing they do, for both positive and negative encounters, is tell others.

PX is significant to the healthcare decisions of consumers.

Recommendations and referrals far outweigh everything else in making health decisions and choices.
EXPERIENCE

- Clinical Outcomes
- Financial Outcomes
- Consumer Loyalty
- Community Reputation

Cycle of Experience

1. Experience
2. Stories/Recommendations
3. Choices
4. Outcomes

The cycle moves from Experience to Stories/Recommendations, then to Choices, and finally to Outcomes, forming a continuous loop.
Panel & Participant Discussion

Hala Durrah
Debbie Landers
Sean Rodriguez
Jason A. Wolf, PhD, CPXP

Closing Reflections
Consumer Perspectives on Patient Experience 2018:
Insights and Opportunities for Action

Jason A. Wolf, PhD, CPXP
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April 22, 2018
Thank you for participating

Please look for a post- webinar evaluation coming soon.

www.theberylinstitute.org