The Top Patient Experience Challenges of 2023

A retrospective analysis from 2 million patient surveys across healthcare organizations to inform the future of experience.

Overall Experience:
1 2 3 4 5

Feedtrail XM
HEALTHCARE

www.feedtrail.com

Introduction

Healthcare had quite a year in 2023. It underwent substantial changes — driven by technological advancements in AI, regulatory shifts, and evolving patient expectations of care. While offering opportunities for innovation and progress, 2023 also showed healthcare still grapples with persisting challenges that threaten the very core of care delivery — the patient experience.

Feedtrail collected over

2 million

patient responses to find where patients are facing the biggest hurdles when engaging with their providers.

Feedtrail, the healthcare industry's leading experience management technology provider, collected over 2 million patient responses across a comprehensive array of healthcare organizations to pinpoint exactly where – and which – patients are facing the biggest hurdles when engaging with their providers. In this report, we share what patients across the industry said were their top 10 challenges faced, then break these down by organization, gender, and race/ethnicity, and provide some data and insight concerning Net Promoter Score (NPS). We then provide an assessment that draws attention to the broader issues, such as the most widely reported barriers to outstanding patient experience around cost, communication, access, and missed expectations. Along with this analysis, we identify the organization types most associated with these obstacles and share quotes from survey participants about their struggles. We conclude with several actionable strategies for improvement.

We hope providers everywhere can harness these insights to empower their healthcare professionals, inform better decision-making, and, ultimately, enhance and personalize patient experiences.

Table of Contents

All anonymous quotes herein are derived from Feedtrail's 2023 qualitative data, and have been revised for length and clarity.

Survey Results:
2 Million Patients Speak

The List: Healthcare's Top 10 Patient Experience Challenges

To analyze the biggest obstacles to patient experience, Feedtrail's team segmented topic areas that generated the most underwhelming score values from patients.

The top 10 lowest-scoring question categories for 2023, with 1 being least favorable, were:

1. Billing/Insurance
2. Pain Management
3. Food
4. Discharge Information
5. Sliding Scale
6. Wait Time
7. Care Team Experience
8. Communication About Medication
9. Provider Experience/ Communication
10. Access to Care

Using its advanced analytics platform, Feedtrail drilled into these categories to understand how pain points differed across organization types, gender, and race/ethnicity:

Top Challenge by <u>Organization Type:</u>

- **Home Health Providers:** Access to Care

- **Acute Care Hospitals:** Provider Experience/Communication

- **Imaging Centers:** Wait Time

- **Children's Hospitals:** Discharge Information

- **Behavioral Health:** Food

- **Hospitals and Health Systems:** Pain Management

- **Community Health/FQHCs:** Pain Management

- **Physician Practices/Ambulatory Surgery Centers (ASCs):** Billing/Insurance

- **Critical Access Hospitals:** Billing/Insurance

Top Challenge by <u>Gender:</u>

- **Female Top Challenge:** Food

  Women frequently cited a lack of food options, being served cold food, and an overall disappointment in food quality.

  > *Women consistently rated questions lower than men across the board.*

- **Male Top Challenge:** Access to Care

  Men were often frustrated by phone systems, wait times, and appointment availability.

Top Challenge by Race/Ethnicity:

- **Asian or Pacific Islander:** Staff Courtesy and Respect

- **Hispanic:** Communication About Medications

- **Native American:** Discharge Information

- **Black:** Food

- **White:** Food

- **Unknown:** Billing/Insurance

> *Diving into corresponding qualitative question responses can help organizations understand what specifically to improve and where to focus their limited resources. Both Native American and Hispanic patients cite issues related to communication, which could be taken into consideration when developing new processes and materials. Organizations can also dig in to see if they need to adjust how they interact with Asians and Pacific Islanders and tailor interactions. Food also has varying factors that can be uncovered from text responses to understand where improvements can be made and if there are quick fixes.*

"

For so long, we've seen a one-size-fits-all approach for patients. Now, we can segment and display this data in a digestible manner. It's time for us to personalize how we speak with our patients and the information we give to them and tailor it to how they're suited to best receive it.

— Nikki Angeli MHA, BSN, RN, CPHQ, CPXP,
Patient Experience Strategist, Feedtrail

Patient Loyalty Checkup: NPS

To understand the broader picture of patient satisfaction, Feedtrail also gathered the overall Net Promoter Score (NPS) for 2023 and NPS scores by organization type, gender, and race/ethnicity. NPS is one of the most widely used and accepted metrics to understand customer loyalty and is a strong indicator of overall patient experience. NPS is generated by asking **"How likely is it that you would recommend us to a friend or colleague?"** with responses scored on a 0 to 10 scale.

POOR	GOOD	EXCELLENT
-100	0	50	100
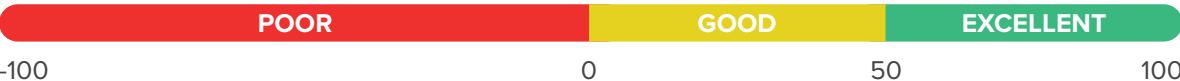
Based on a study by Deloitte, an industry's loyalty leader grows two times as fast as the competition. Knowing this, it's no surprise a 2022 Feedtrail industry survey showed this metric is increasingly being used more in healthcare, with 26% of healthcare organizations ranking NPS as the top metric used by their leadership to measure the impact of patient experience efforts.

26%
of healthcare organizations rank NPS as the top metric used by their leadership to measure the impact of patient experience efforts.

Here is how NPS stacked up in 2023 according to Feedtrail's patient experience surveys:

Overall 2023 NPS

89

NPS by Gender:

Women: **88**

Men: **89**
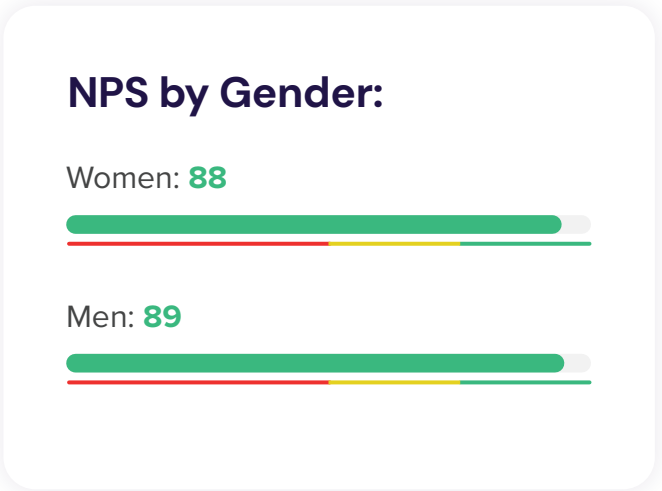
NPS by Organization Type:

Critical Access Hospitals: **92**

Physician Practices/ASCs: **90**

Health Systems and Hospitals: **90**

Imaging Centers: **89**

Behavioral Health: **87**

Community Health/FQHCs: **81**

Home Health Providers: **68**

Children's Hospitals: **52**

NPS by Race/Ethnicity:

Black: **89**

Unknown: **89**

White: **88**

Asian or Pacific Islander: **87**

Hispanic: **86**

Native American: **85**

> *NPS scores were lower during cold months and higher during warm months.*

Analysis of Challenges by Category

To contextualize the challenges that patients most often faced in 2023, Feedtrail bucketed the top 10 into overarching themes and reviewed both the real-world drivers behind each problem and the barriers that must be overcome for healthcare leaders to implement lasting improvements.

Cost: Billing, Insurance, and Sliding Scale

Out of all patient experience challenges from 2023, cost issues related to billing and insurance topped the list. Sliding scale — payment rates offered to patients based on economic status — also received suboptimal ratings from patients in 2023.

Truthfully, payment is a consistent sticking point nationwide. A majority of insured Americans report experiencing obstacles to getting proper coverage, as well as paying their medical bills. And one in four American adults say they skipped getting needed healthcare due to affordability issues in 2023.

This finding parallels an overarching frustration among patients with payment. Four in 10 Americans insured through employers and three-quarters without insurance report problems affording care. The data show even patients offered care services on a sliding scale often encounter similar obstacles and confusion. Patients want to clearly understand what they need to pay and what their insurance will cover, but this information is still murky, making them frustrated and anxious.

> "
>
> *You could improve by clearly communicating what my financial responsibilities are and telling me in advance if my insurance is not covering my visit.*

Most-Associated Organization(s)

Billing and Insurance

Critical Access Hospitals

Hospitals and Health Systems

Physician Practices/ASCs

Sliding Scale
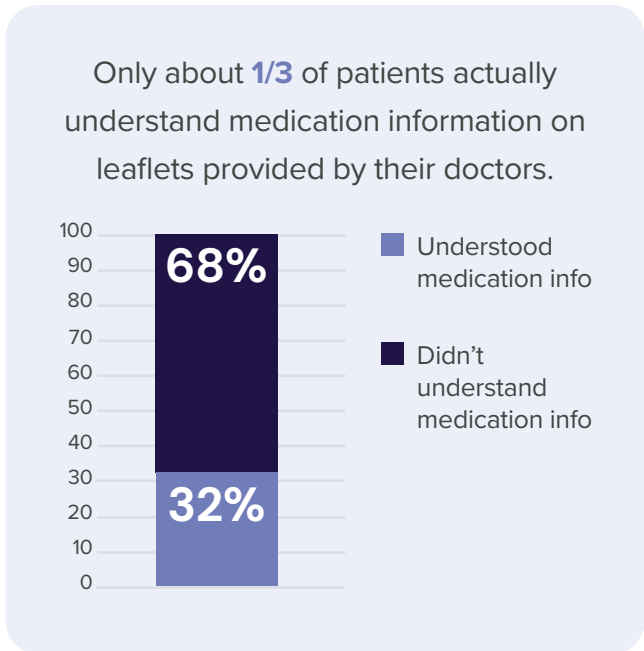
Community Health/FQHCs

> " *I still don't know how my treatment is being covered, this causes me to live in anxiety and fear every day. I do not know if I'm going to receive a huge bill in the future.*

> " *I have been trying to get someone to talk to about a bill I'm not supposed to get because I'm on sliding scale. I have tried three times over the past three months and it's still not taken care of, even though I was told it would be.*

Communication: Medication, Pain, and Discharge Instructions

In 2023, patients gave providers subpar ratings when it came to communicating information about their prescriptions. Some highlighted reasons included insufficient information and the inability to ask questions. In a related challenge, patients reported similar scores for providers when it came to pain management in 2023 — citing a feeling of doctors dismissing pain concerns, distrust, and being prescribed ineffective medication. This challenge also extended to underwhelming ratings for discharge information — specifically in areas of effective communication and time taken to effectively educate patients.

Only about **1/3** of patients actually understand medication information on leaflets provided by their doctors.

68%

32%

- Understood medication info
- Didn't understand medication info

The effects of this disconnect play out every day. One report found only 32% of patients actually understand medication information on leaflets provided by their doctors. Unfortunately, misunderstanding or not having the right education resources can create adherence problems at scale — such as with 40% of diabetic patients missing their second-line doses.

When it comes to pain management, the truth is that it simply isn't easy to get right. Many doctors fear over-prescribing possibly addictive pain relievers. Unfortunately, that's led to frequent dismissal of serious pain. With one in five Americans facing chronic pain, understanding how to effectively partner with patients to address their pain-related issues is imperative.

An opportunity emerges for organizations to slow down and spend more time listening to patients with time for questions, along with providing communication channels when concerns or questions arise once a patient is at home.

Most-Associated Organization(s)

Communication about Medication

Physician Practices/ASCs

Critical Access Hospitals

Pain Management

Children's Hospitals

Community Health/FQHCs

Physician Practices/ASCs

Hospitals and Health Systems

Discharge Information

Children's Hospitals

Physician Practices/ASCs

Behavioral Health Providers

> I need more information about the side effects of the medication. When I asked questions my doctor seemed rushed and irritated.

> I felt like my pain, which I've been experiencing for over a year and which has worsened, was dismissed. The doctor told me it was probably just hormones. Typical American healthcare approach to a woman in pain.

> My discharge information was not explained at all and I did not receive any printed instructions.

Access: Securing and Waiting for Care

Among the challenges patients faced in 2023, two related aspects stood out: issues with accessing care and frustration with wait times.

When it came to access, survey respondents cited barriers to easily scheduling doctor visits, navigating tricky phone systems, finding an appointment within a timely manner, and even finding parking or transportation as specific sticking points.

Multiple converging events could've also contributed to declines in access ratings. For instance, 2023 witnessed record hospital closures, particularly in rural areas with few providers. And though the country saw a historic low in uninsured individuals in 2023, many patients still face barriers unrelated to coverage — such as transportation issues hindering them from attending appointments and filling medications.

As for wait times, patients frequently cited they received little communication about delays. Realistically, this finding is rife with nuance. Wait times could include anything from waiting to simply book an appointment (it takes an average of 26 days for patients in metro areas to reserve a new doctor) to having to sit longer than expected before in-office visits. Whatever the context, they're frustrating just the same — creating a huge opportunity for organizations to remove barriers to care.

It takes an average of **26 days** for patients in metro areas to reserve a new doctor.
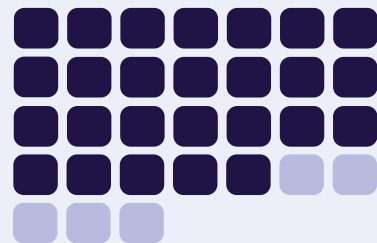
> "
> *I arrived like I was told, 30min before my appointment time. Then I had to wait for my mammogram with all of the sick people. Not a good experience and you didn't see me until 20min after my appointment time with no communication.*
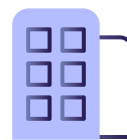
Most-Associated Organization(s)

Acces to Care

| Home Health Providers | Hospitals and Health Systems | Critical Access Hospitals | Community Health/FQHCs | Imaging Centers |

Wait Times

| Community Health/FQHCs | Critical Access Hospitals | Imaging Centers |

> *It took weeks to get an appointment and the times were very limited. Then the first appointment was just to determine eligibility.*

> *There need to be more appointment options, especially on the weekends for working parents.*

Missed Expectations: Experience with Care Teams, Staff, and Providers

Patients also faced issues when communicating and engaging with care teams, front-of-office personnel, and their providers. Specifically, patients pointed to issues with feeling rushed by their physicians, interrupted during discussions, and ignored by reception staff.

Notably, they reported a lack of empathy from doctors as contributing to relatively low scores. And, at the organization level, respondents — especially female survey-takers — expressed frustration over amenities offered at facilities, giving food options comparatively low scores.

This multi-level pattern speaks to evolving patient expectations of care and issues organizations face when striving to meet them. Most patients want better, more consistent communication with their provider and do not want to feel rushed. Unfortunately, historic staffing shortages have left clinicians with less time to engage their patients — possibly amplifying issues with provider experience.

Adding fuel to the fire, the state of empathy in healthcare is in crisis. Starting even before COVID-19, care team members have been increasingly overwhelmed with heaping admin tasks, more patient volumes, and less time for decompression — leading to unprecedented burnout that erodes empathy. In fact, 70% of patients state their doctors lack compassion. And in 2023, AI programs like ChatGPT were deemed as more compassionate than human doctors by some patients — a troubling trend that should worry every healthcare leader.

70% of patients state their doctors lack compassion.

70%
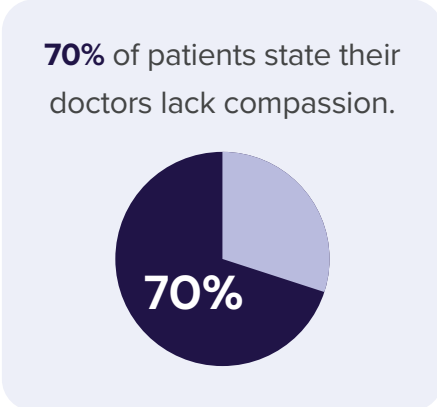
> "The food was cold and the dietician was very rude and hung up on me. It's hard dealing when you are sick and hungry."

Most–Associated Organization(s)

Provider Experience/Communication

Physician
Practices/ASCs

Acute Care
Hospitals

Care Team Experience

Children's
Hospitals
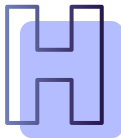
Behavioral
Health Providers

Physician
Practices/ASCs

Food

Behavioral
Health Providers

Hospitals and
Health Systems

> "*I usually stand waiting a few minutes while receptionists look at their computers and don't acknowledge me.*"

> "*They were very knowledgeable and efficient, but not caring, too robotic and cold.*"

Key Strategies
for Improvement

✅ Meet patients where they are with digital channels

Access to care is a gap for many organizations. Subpar digital resources underpin this frustration when patients schedule appointments. To help improve in this area, healthcare practices must meet digital-era expectations by using automated appointment schedulers, accessible portal logins, text messaging notifications, and streamlined check-ins. Other simple tools, such as missed appointment surveys that ask about the patient's main challenge, can offer eye-opening findings for organizations looking to remove barriers to care.

✅ Understand how experiences differ across your patient population

Of all race/ethnicity groups, both Native American and Hispanic respondents cited top issues related to communication. Organizations must dig deeper into the patient comments they receive to understand how they could better communicate with specific patient groups, understanding where the gaps are and how to fix them. As DEI initiatives continue to gain momentum, tying EHR identifiers to experience data allows you to understand how different segments of your patient population are experiencing your organization so you can personalize engagement – such as looking at responses by age group, ethnicity, gender, zip code, insurer, and more.

✅ Practice continuous listening and improvement

There's no question patients felt disconnected from their care teams in 2023, often left with unanswered questions and feeling unheard. Knowing what's going wrong in the moment lets organizations quickly resolve any issues before concerns pop up in post-discharge

surveys or online reviews. By leveraging efficient, real-time surveys, you can identify disconnects and perform immediate service recovery before a patient leaves your care to ensure expectations are met and exceeded.

✅ Show your staff what excellence looks like

Negative responses and comments help you identify and address problems, but positive scores and kudos offer an opportunity to define best practices, highlight star performers, and celebrate wins. 80% of the feedback collected by Feedtrail is positive and complimentary in nature. Using this information, organizations have a treasure trove of examples they can share internally of how to effectively communicate, create welcoming environments, and improve experiences.

✅ Think about opportunities to improve data hygiene

A lot of data gaps still persist for organizations — both in how patients receive information and how it's stored. For instance, missing demographic data in EHRs can hinder constructive patient experience analysis. Healthcare providers can support better collecting and organizing of patient information in the EHR by focusing on improvement at the point of intake. As reception becomes more effective at inputting essential patient information, healthcare leaders can more efficiently segment findings by identity categories.

Using Real-Time Feedback to Improve Patient Experience in 2024

Healthcare has made improvements in patient experience over the past couple of decades. But as the numbers show, it continues to face some serious challenges. It's clear the first step to solving them is understanding where problems exist.

In 2024, providers will need a multi-angled approach to addressing these issues. For instance, to improve patient access they must think beyond the four walls of the facility to what barriers their patients face when attempting to navigate their care journeys — everything from scheduling to finding rides to navigating tight parking lots and feeling forgotten in the waiting room. They must embed supporting empathy and compassion in every patient-provider interaction into the very fabric of their operations. And they have to laser-focus on streamlining operations to ensure convenient avenues for patients to get the care they need.

With flexible, real-time surveys, organizations can get to the root of poor patient experiences and ask deeper questions relevant to their improvement initiatives. Healthcare organizations across the U.S. leverage Feedtrail's cutting-edge platform to understand the "why" behind ratings — allowing them to proactively address the most important issues and rapidly resolve them. Using Feedtrail's technology, providers can drill down into the details to understand how experiences differ across service lines, ages, genders, ethnicities, and more.

By thoroughly understanding how obstacles to patient experience affect not just the general patient population but specific cohorts of patients, hospitals can refine their approaches to improving experience and personalize care for each member of the communities they serve.

Ready to Face Your Patient Experience Challenges Head–On?

Speak with a Feedtrail patient experience expert.

Let's Talk →

Feedtrail xm
HEALTHCARE

www.feedtrail.com

BEST IN KLAS®
PATIENT EXPERIENCE IMPROVEMENT
2024