

# Understanding the Patient Experience: How to Select a Data Collection Method



There are many methods for collecting data from patients. Each method offers advantages and disadvantages. Use this job aid to select the right data collection method given your needs and available resources. Note that patients should voluntarily participate in data collection. Institutional review board approval is not necessary for collecting patient experience data unless you intend to use the results for a formal research study.

**Before selecting a method, identify the purpose of collecting data from patients—what are you trying to learn?**

Let your question(s) drive your data collection method. Consider using a combination of methods—such as surveys, interviews, and observation—to get a more comprehensive understanding of patient experience.

## Types of Data Collection Methods

Use the table below to explore data collection methods and their associated advantages and disadvantages. When data collection requires patient participation (e.g., interviews, focus groups, surveys), consider compensating patients for their time.

|                    | Paper Survey  | Online Survey  | Individual Interview   | Focus Group  | Observation   | Secret Shopper Calls   |
|--------------------|---|--|--|--|---|--|
| Description        | A consistent set of questions (closed- and/or open-ended) distributed to a large number of patients in hard copy. It may be distributed and collected during a patient's visit. | A consistent set of questions (closed- and/or open-ended) distributed to a large number of patients in an online format. It may be distributed at the clinic (via a tablet or QR code) or after the visit (via text or email). | A staff member or outside consultant conducts a one-on-one interview with a patient in a private setting. If you can't compensate patients for their time, plan to keep interviews brief (no more than 10 minutes long). | A staff member or consultant facilitates a discussion among a small group of patients. | A staff person acts as a "fly on the wall" and observes how patients move through the clinic and interactions between staff and patients. | A staff member, consultant, or volunteer calls the clinic to ask for an appointment and information about clinic services, in order to simulate the patient's experience when calling. |
| What you can learn | A little about how a large number of patients perceive their health care experiences.   | A little about how a large number of patients perceive their health care experiences.  | A lot about how a small number of patients perceive their health care experiences.   | A lot about how a group of patients perceive their health care experiences.            | What actually happens at various points in a patient's journey in the clinic.   | What actually happens when a patient calls the clinic.   |

|               | Paper Survey   | Online Survey   | Individual Interview  | Focus Group  | Observation   | Secret Shopper Calls  |
|---------------|--|---|---|--|---|---|
| Advantages    | <ul style="list-style-type: none"> <li>• Easy to administer, compared to non-survey methods</li> <li>• If administered in the clinic, high response rate compared to online surveys sent after the visit</li> <li>• Easy to analyze (if the survey includes mostly close-ended questions)</li> <li>• Findings are generalizable (if the sample size is large)</li> <li>• Patients can participate privately and anonymously</li> </ul> | <ul style="list-style-type: none"> <li>• Easy and quick to administer, compared to non-survey methods</li> <li>• Can set up automatic distribution through email, text, or a patient portal</li> <li>• When administered in the clinic, higher response rate compared to online surveys sent after the visit</li> <li>• No data entry required for analysis</li> <li>• Easy to analyze (if the survey includes mostly close-ended questions)</li> <li>• Findings are generalizable (if the sample size is large)</li> <li>• Patients can participate privately and anonymously</li> </ul> | <ul style="list-style-type: none"> <li>• Patients can describe their experiences and how they feel about their care in their own words</li> <li>• Provides an opportunity to ask follow-up questions and delve deeper into topics</li> <li>• Greater ability to gather in-depth feedback and insights, compared to other methods</li> </ul> | <ul style="list-style-type: none"> <li>• Patients can describe their experiences and how they feel about their care in their own words</li> <li>• Provides an opportunity to ask follow-up questions and delve deeper into topics</li> <li>• Can gather many perspectives at once and listen to patients exchange viewpoints</li> </ul>  | <ul style="list-style-type: none"> <li>• Can see firsthand what patients experience</li> <li>• Flexible to the observers' needs (i.e., they can focus on specific parts of the patient journey, depending on what they want to learn)</li> <li>• Can time how long various steps in the patient journey take</li> <li>• Does not put any burden on patients to participate</li> </ul> | <ul style="list-style-type: none"> <li>• Can experience firsthand what patients experience</li> <li>• Since staff aren't aware they are being observed, no risk of them changing behavior due to observation</li> <li>• Does not put any burden on patients to participate</li> </ul> |
| Disadvantages | <ul style="list-style-type: none"> <li>• Distribution can't be automated; staff must describe and distribute the survey</li> <li>• No opportunity to ask follow-up questions or get in-depth information</li> <li>• Bias associated with self-reported data</li> <li>• Data entry required</li> </ul>  | <ul style="list-style-type: none"> <li>• When distributed after a visit, lower response rate compared to surveys administered in the clinic</li> <li>• No opportunity to ask follow-up questions or get in-depth information</li> <li>• Bias associated with self-reported data</li> </ul>  | <ul style="list-style-type: none"> <li>• Patients can't participate anonymously</li> <li>• May be difficult to recruit patients to participate without compensation</li> <li>• Time-intensive for staff to conduct interviews and analyze themes</li> <li>• Findings are not as generalizable as surveys</li> </ul>                         | <ul style="list-style-type: none"> <li>• Patients can't participate anonymously</li> <li>• May be difficult to recruit participants without compensation</li> <li>• Time-intensive for staff to conduct focus groups and analyze themes</li> <li>• Findings are not as generalizable as surveys</li> <li>• May be difficult to manage the discussion without an experienced facilitator</li> </ul> | <ul style="list-style-type: none"> <li>• Staff and patients may change their behavior, if they know they're being observed</li> <li>• No opportunity to understand how patients feel about their experiences</li> </ul>   | <ul style="list-style-type: none"> <li>• Staff may get upset if they learn they were being observed without their knowledge</li> <li>• Limited to collecting data on patients' experience when they call the clinic</li> </ul>  |

# Select a Data Collection Method

Use this flow chart to select a method(s) that fits your clinic's needs and available resources.

