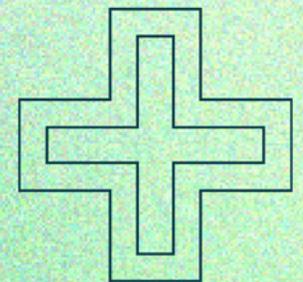


 Reputation

REPUTATION REPORT

Healthcare Industry '22



What Does It Take to be a Top Healthcare Provider?

What do consumers think of healthcare providers? The 2022 Healthcare Reputation Report has answers.

The Reputation Data Science team analyzed 2,778,931 patient reviews across 179,073 physician and locations.

We analyzed the 25 largest health systems and ranked the top 15 using our Reputation Score, which is based on public listening data.

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+50%

Review volume jumped 50% for hospitals.

+58%

Review volume jumped 58% for physicians.

4.4★

Facilities achieved an average star rating of 4.4

4.7★

Physicians achieved an average star rating of 4.7

72%

72% of healthcare consumers want their provider to be rated 4 out of 5 stars or higher.

KEY FINDINGS

Review volumes are up.

Review volume jumped 50% for hospitals and 58% for physicians over 2020 – a key indicator that patients have been going back to the doctor after putting many healthcare needs on hold during the first year of the pandemic. This increase in reviews is important because **three out of four U.S. adults read online patient ratings and reviews when deciding on a healthcare facility or physician.**

KEY FINDINGS

Consumer sentiment is holding steady.

Facilities achieved an average star rating of 4.4 and physicians, 4.7. Both are flat compared to 2020. This matters because 72% of healthcare consumers want their provider to be rated 4 out of 5 stars or higher online patient ratings and reviews when deciding on a healthcare facility or physician.

KEY FINDINGS

Patients are happy with their clinical care, and unhappy with other experiences.

- **Biggest positive:** bedside manner is the biggest driver of positive sentiment.
- **Biggest negative:** ratings of administrative staff comprise the biggest driver of negative sentiment.
- **Facilities need to improve all touchpoints** across the entire patient experience from searching for a provider to paying a bill.



The Consumer Journey Online

The healthcare industry was tested once again in 2021 by the unrelenting coronavirus pandemic. Healthcare workers cared for the infected and comforted the dying. They put their personal health and safety at risk. When vaccines became available, they mobilized rapidly to help millions of people.

This happened as healthcare continued to be shaped by compelling issues such as regulatory change, the digitization of the industry, and the shift to value-based care.

At the center of it all: consumers. Consumers who use digital to find care. Consumers whose ratings and reviews separate the healthcare industry leaders from the followers.

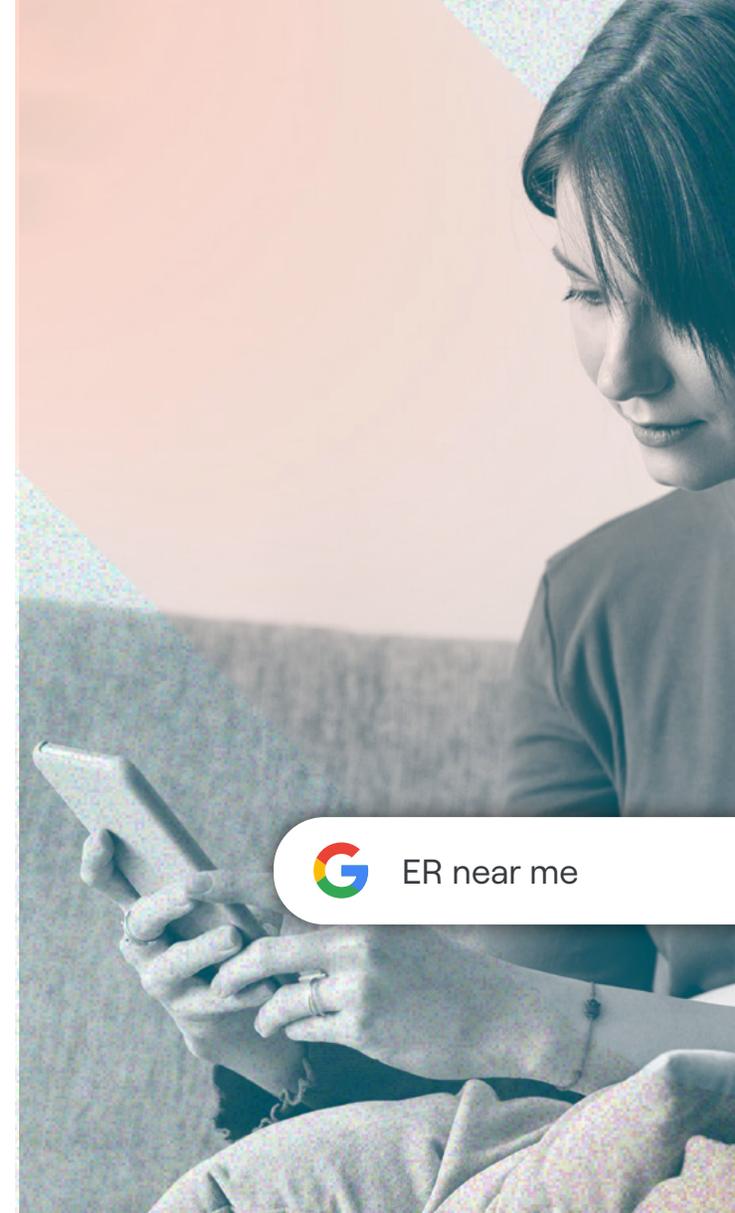
Ratings and reviews online are influencing the future of healthcare as they are in other industries.

According to research that Reputation conducted recently with YouGov, in 2021, 72% of U.S. adults read online patient ratings and reviews when considering a healthcare facility or physician; and 65% of U.S. adults said they expect providers to respond to reviews.



When consumers research ratings and reviews, they tend to start on Google. Our research showed that Google is the most popular source for searching for a physician or hospital – more popular than provider/physician websites, healthcare-specific sites, or social media. Google is also the #1 review site used by healthcare consumers.

Because of Google's influence, the Reputation Data Science team examined how people have interacted with facilities' and physicians' Google Business Profiles. We studied listings data for 90,578 facilities and physicians in the U.S.



72%

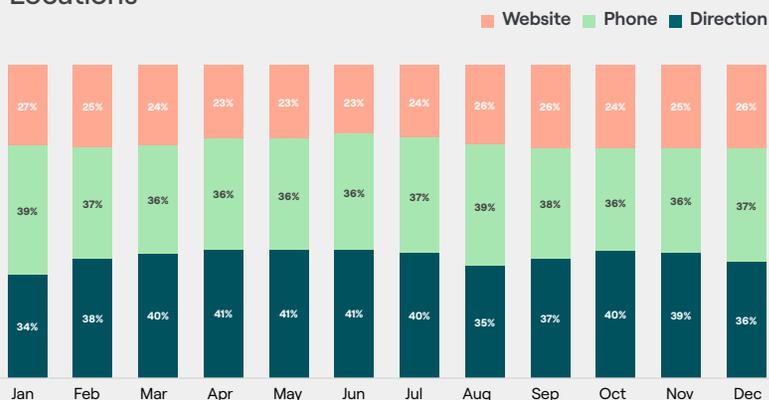
of U.S. adults read online patient ratings and reviews when considering a healthcare facility or physician.

65%

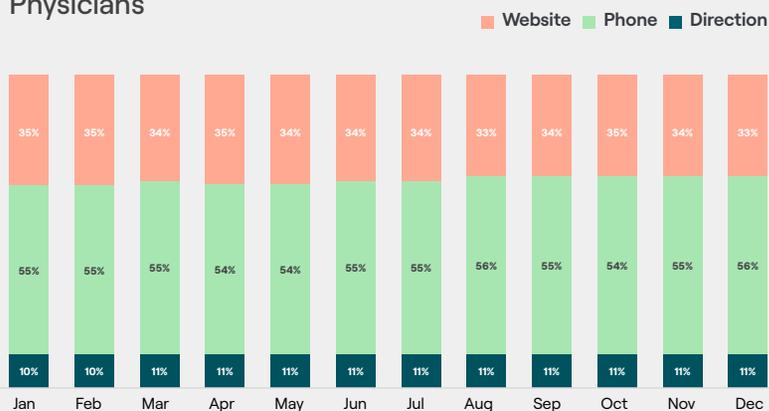
of U.S. adults said they expect providers to respond to reviews.

Google Business Profiles Actions in 2021

Locations



Physicians



- **For hospital locations:** actions (defined as someone clicking on a Profile to call a location, visit a website, or get directions to a location) increased by 12%. Views were up 25%. Clicks to call a location and clicks to get directions had the highest share of actions. The uptick shows just how actively consumers are using Profiles as a jumping-off point for finding a hospital, especially visiting a location. The variety of actions taken also underscore how much healthcare is a multi-channel experience.
- **For physicians:** actions were down 1%; views were up 14%. Actions dropped because clicks to visit a physician’s website dropped. This may reflect the reality that most Google searches don’t result in a visit to a website.



It’s Google’s world – and healthcare is living in it. The healthcare facilities and physicians who accepted this reality and made themselves easy to find on Google were more likely to be found, considered, and chosen. They attracted more traffic and created a strong first impression for consumers.

So, what did consumers think of the care they received once they became patients?

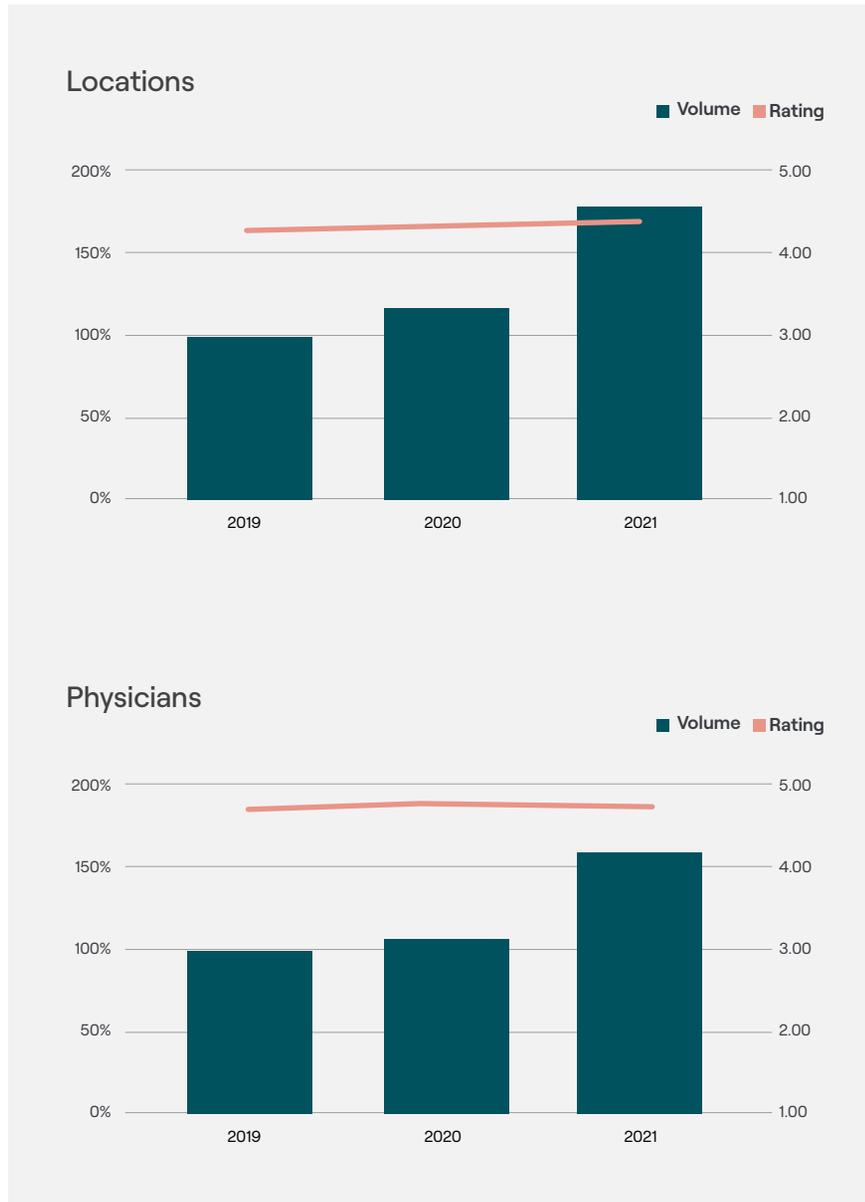
What Patients Think of Providers

The Reputation Data Science team examined **2,778,931** patient ratings and reviews across providers' websites and social channels to understand how and how often patients reviewed facilities and physicians in 2021.

We used our own data analysis methodology that uses natural language processing to detect patterns in patient comments.

Here's what we found.

Review Trends: 2019 – 2021



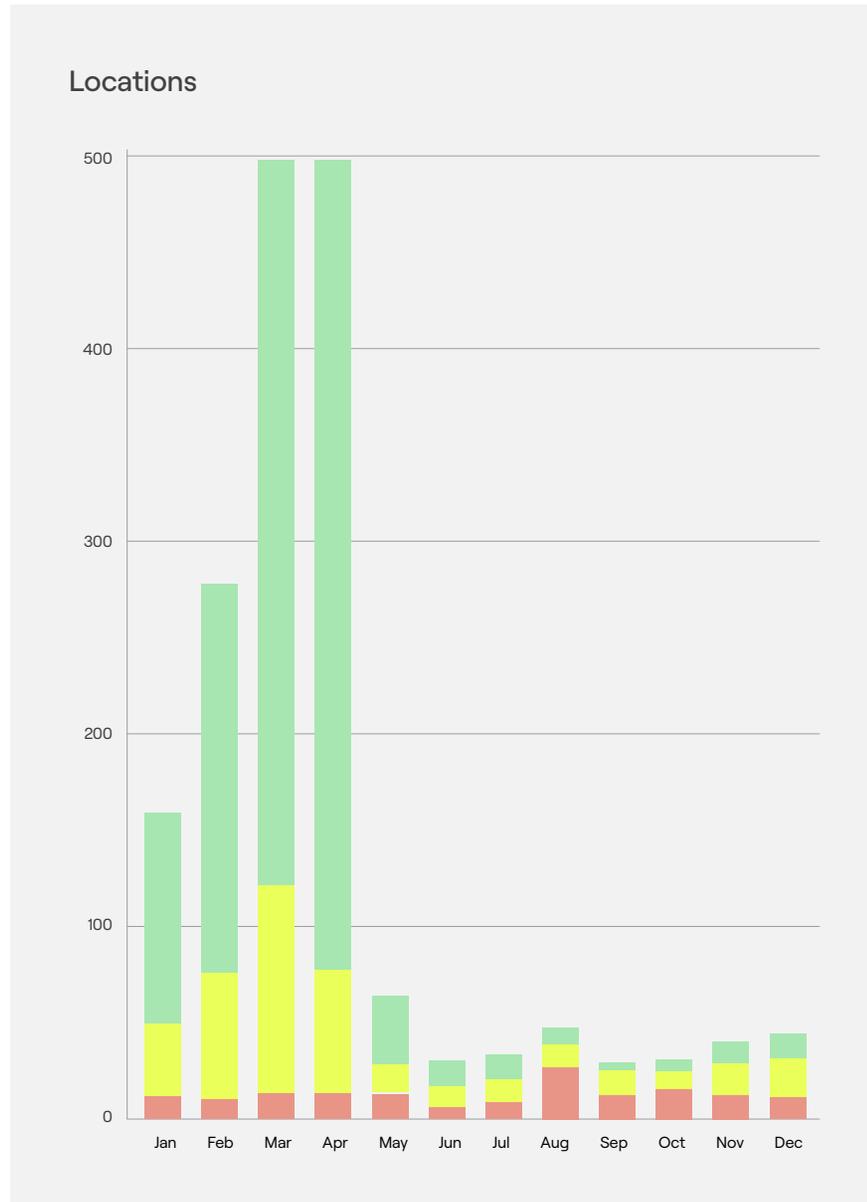
Review Volume Is Up; Sentiment Is Flat

- **Review volume is up:** reviews of healthcare facilities increased 50% for hospitals and 58% for physicians over 2020.
- **Facility star ratings are on the rise:** facilities achieved an average star rating of 4.4, up 0.05 points over 2020.
- **Healthcare provider ratings are falling:** physicians received an average star rating of 4.7, which was a drop of 0.03 points from 2020.



Consumers pay close attention to star ratings: 72% of consumers told us that they want the provider they choose to be rated 4 out of 5 stars or higher.

Sentiment: Covid-19 Vaccine Experience

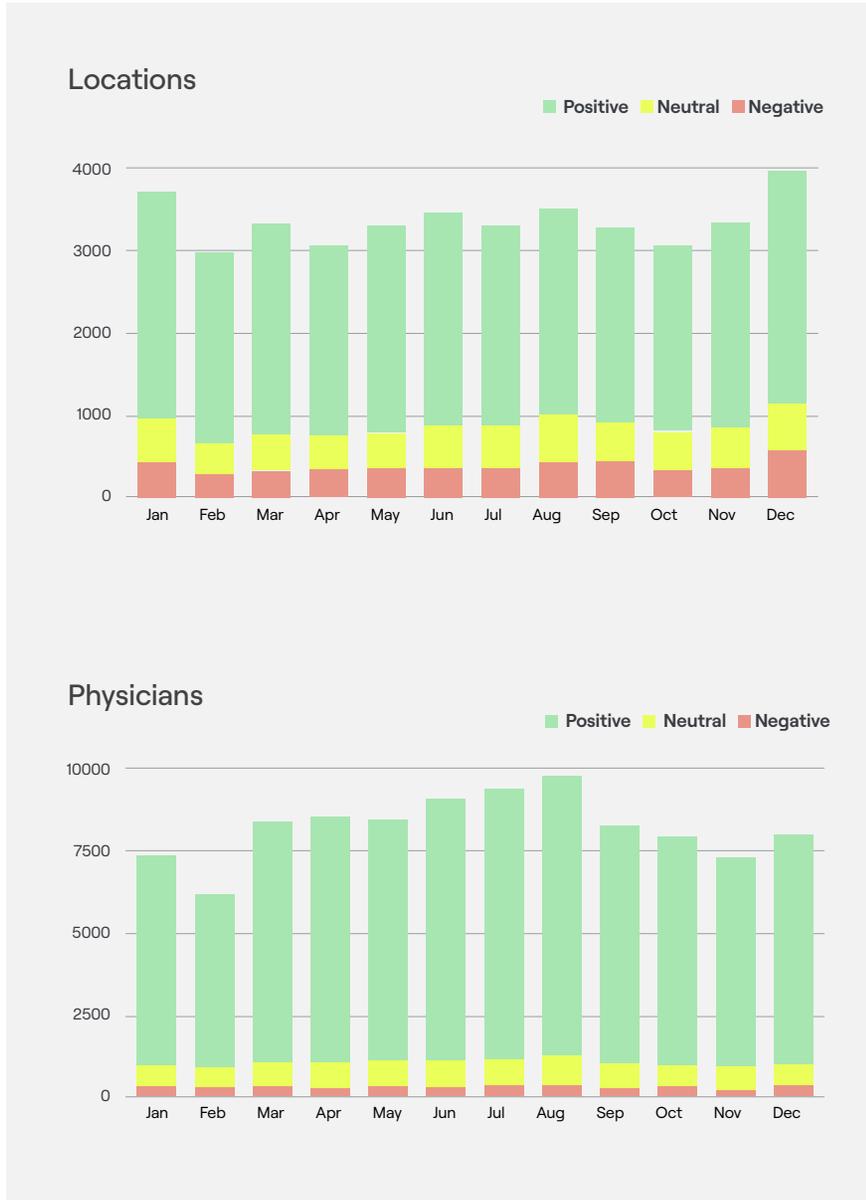


The Covid-19 vaccine experience drives positive sentiment

One of the most compelling healthcare stories of 2021 was how quickly and efficiently providers mobilized to administer Covid-19 vaccines as they became available. Doing so was a Herculean undertaking, requiring providers to learn important storage requirements for different vaccines, communicate protocols to consumers, schedule appointments, administer the vaccines, and then manage the entire process again for booster shots.

- **Consumers appreciated how well providers managed the vaccination process.** Positive feedback typically mentioned how smooth the process worked and the overall professionalism of the experience. They also praised healthcare workers for the efficient way they vaccinated their children.
- **Vaccine rollout impacted review volume:** review volume surged in the first four months of 2021 with the initial vaccine rollout and then tapered off drastically, and with that drop-off, we saw a decline in sentiment. We do not expect the vaccine experience to continue being a driver of positive sentiment in 2022.

Sentiment: Bedside Manner



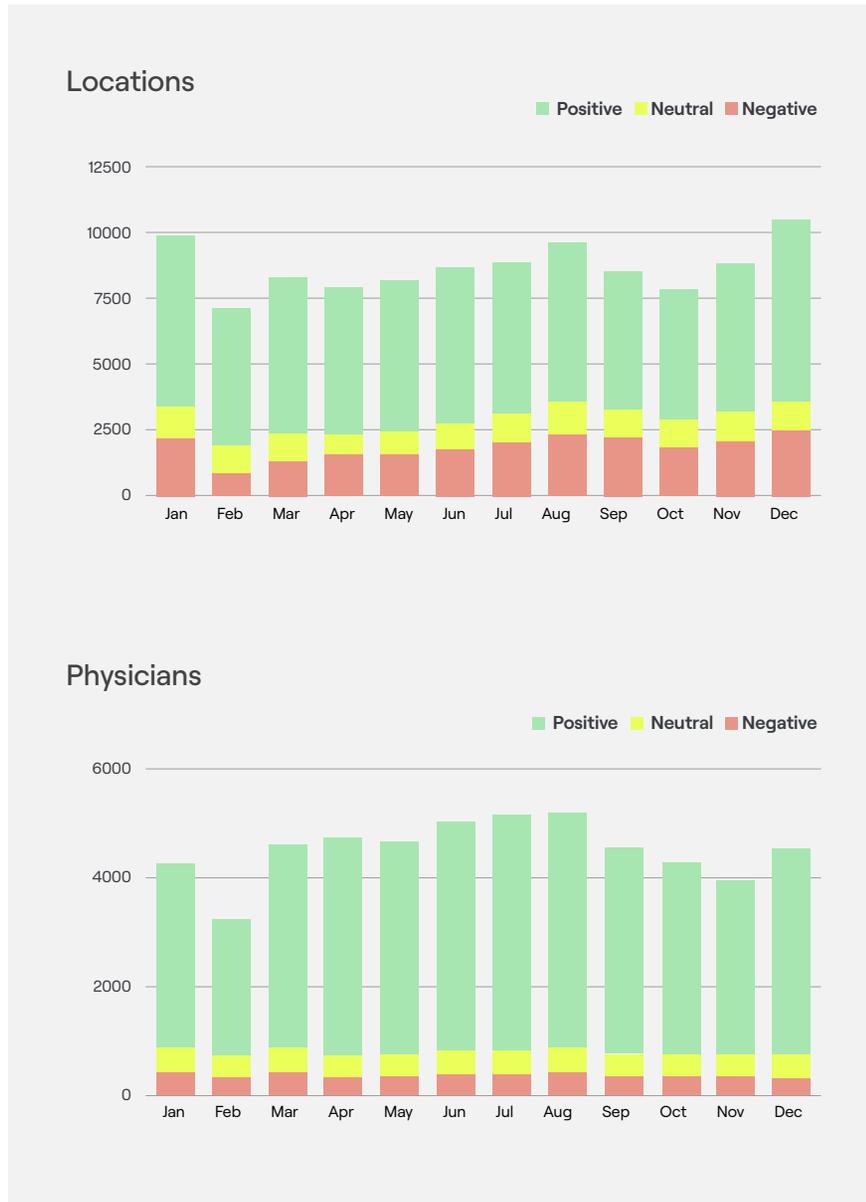
Bedside manner drives positive sentiment; but staff hurts sentiment

- **Biggest positive sentiment driver:** the bedside manner of physicians and nurses constituted the strongest driver of positive sentiment.
- **Biggest negative sentiment driver:** ratings of staff were among the biggest drivers of negative sentiment.



Healthcare workers are on the front lines providing a complete experience – from the physicians and nurses who treat patients to the administrative staff who check them into the hospital and manage billing.

Sentiment: Staff



Patients mention physicians by name

When we dug deeper into the ratings, we were impressed by how often patients mentioned specific physicians and nurses by name.

- **Positive reviews:** this feedback typically highlighted a provider’s compassion, ability to communicate clearly, and listening skills. This praise was typical: “[Name of Physician] is the most caring, thorough, knowledgeable, responsive, proactive healthcare provider I’ve ever known.”
- **Negative reviews:** this feedback focused on lapses in follow-through on the administrative side of healthcare. Complaints focused on areas such as billing and a poor impression left by people staffing the front desk, usually having to do with patients feeling like they were treated rudely.



The disparity in ratings suggests that facilities need to mind the complete patient experience consistently from intake to aftercare.

Reputation Score Trend



Reputation scores are up for facilities – but down for physicians

In 2021, facilities increased their collective Reputation Score by 45 points, but Reputation Score for physicians declined by 15 points. Why? These factors stand out:

- **Facilities:** we saw increases in review volume and recency as well as listing accuracy. In other words, patients are submitting more reviews, and facilities are managing the accuracy of their data on important touch points such as Google Business Profiles.
- **Physicians:** we saw a big drop in social engagement as well as small drops in star average and listing accuracy. Physicians need to be more responsive to the unstructured patient feedback that exists largely on social media.



A higher Reputation Score has a direct impact on visibility and conversions throughout the consumer journey to care.

+838%

Healthcare facilities with higher Reputation Scores have 838% more actions (clicks) on their GBP Profiles.

+219%

Physicians with higher Reputation Scores have 219% more actions on their GBP Profiles.

The 800 Award

Reputation honors and recognizes businesses that have received a score of 800 or higher on their reputation, as it indicates they are managing their online reputation effectively. In addition to the top 15 Healthcare organizations we've ranked in this report, there are nearly 8,000 Healthcare and Life Sciences businesses that were recognized with our 800 Award this year. Learn more at reputation.com/800-award

Voice of the Employee

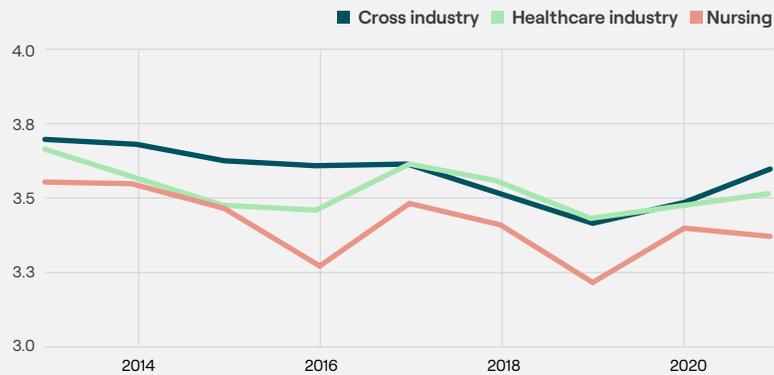
The Great Resignation is affecting all industries, including healthcare.

According to a Washington Post/Kaiser Foundation poll, 55% of front-line healthcare workers have experienced workplace burnout from stress. For providers aged 18-29, that figure is 69%. The reasons for the distress include working extra-long hours, witnessing suffering from Covid-19, and adapting to safety protocols that change constantly. As a result, one in five providers is considering quitting their job – and for nurses in particular, the percentage is even higher at 30%.

We wanted to understand employee sentiment better. So, we analyzed 1 million online reviews by employees in healthcare and compared their sentiment to other industries as follows:

Voice of The Employee: Average Rating

Avg. rating of employee reviews over time



Avg. rating by month



We found that:

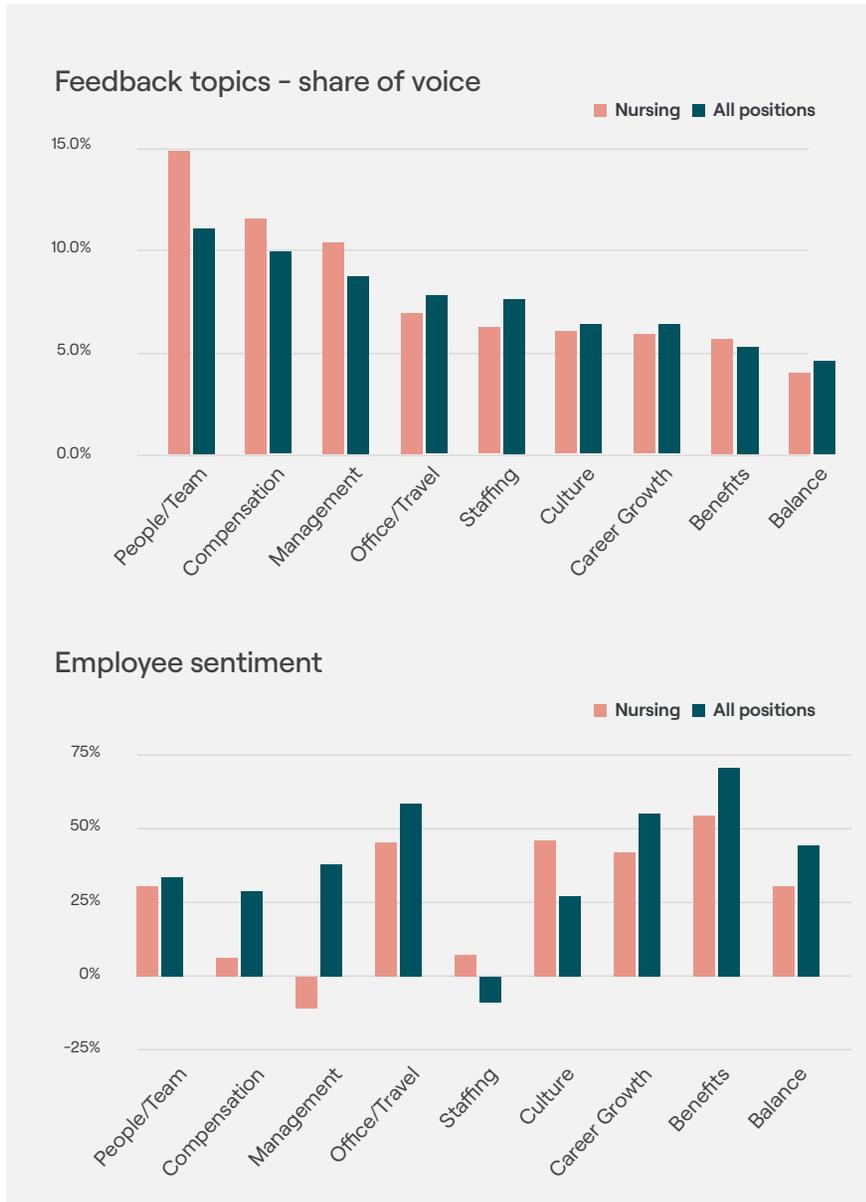
- Across all industries, employee feedback is consistently lower than customer feedback.
- Sentiment for healthcare as a whole is lower than other industries.
- Employee sentiment for all industries has trended lower for several years.
- Feedback from nurses has always been more negative and continues to be.

We took a closer look at sentiment from nurses in particular especially because of their traditionally more negative sentiment compared to other providers and staff. Their workload is grueling, they experience the emotional toll of caring for people who are sick and dying, and they feel underappreciated by physicians and undercompensated by management.

The pandemic has elevated all those concerns. Nurses have often been the ones at patients' bedsides when they die. They've had to quickly pivot from working in operating rooms to coronavirus units. They've typically lacked mental health support.

Here's what we found when we looked at feedback from nurses:

Voice of The Employee: Nurses



The three topics that matter the most to nurses:

- People around them
- Compensation
- Management

This mirrors the rest of the U.S. workforce. But, the nurses in the data set we studied were much more disgruntled about compensation and management.



We're fortunate to partner with Reputation to fulfill our mission of 'making health care easier, so life can be better.'

We are constantly working to improve our patient experience through innovative and meaningful engagement programs. The pandemic has been the ultimate disruptor for the healthcare industry, and there's never been a more important time to listen to and learn from the feedback both patients and employees are sharing.

Alexandra Morehouse
 Chief Marketing Officer
 Banner Health

The Top 15 Healthcare Systems

We analyzed the 25 largest health systems and ranked the top 15 by Reputation Score, which is based on public listening data.^{1,2}

To arrive at a healthcare system's Reputation Score, we evaluated acute care facilities within each healthcare system and aggregated their scores. Reputation Score measures a location's sentiment, visibility, and engagement across nine elements – from star average to review volume. (See the section About Reputation Score for more detail.)

1. Based on publicly reported revenue provided by Modern Healthcare.

2. The scope of hospitals we evaluated was provided by Definitive Healthcare as such: childrens; critical access; long-term acute care; rehabilitation; and short-term acute care.

The Top 15 Healthcare Systems

Rank	System	Reputation Score	Sentiment	Visibility	Engagement
1	Community Health Systems	723	65%	77%	99%
2	HCA Healthcare	685	65%	71%	84%
3	Universal Health Services	684	53%	79%	98%
4	Baylor Scott & White Health	571	46%	68%	81%
5	CommonSpirit Health	556	59%	62%	61%
6	Trinity Health	550	42%	68%	60%
7	Advent Health	546	33%	72%	83%
8	Ascension	541	35%	70%	86%
9	Tenet Healthcare	519	32%	68%	86%
10	Sutter Health	517	42%	64%	85%
11	Northwell Health	507	41%	71%	16%
12	University of Pittsburgh Medical Center	501	27%	69%	82%
13	Spectrum Health	496	35%	63%	78%
14	Banner Health	495	34%	64%	98%
15	Intermountain Healthcare	494	43%	64%	76%

Leaders outperform Laggards in sentiment, visibility and engagement.

- **For sentiment**, the difference between leaders and laggards was 27 percentage points. Sentiment is especially important because of all the elements of Reputation Score, sentiment has the biggest impact.
 - **The biggest difference** between leaders and laggards: engagement. The gap between leaders and laggards was 59 percentage points for engagement. Leaders engage more with patients and respond to reviews much better than laggards do
 - **Visibility is where they perform most similarly**, with a difference of only 6 percentage points.
 - **Leaders accumulated an average of 237% more reviews than laggards.** The average number of reviews for leaders was 803; for laggards, that number dropped to 238.
-  **The biggest opportunity** for both leaders and laggards is to become more visible online – specifically with Google, where consumers are looking for care.

“

At CHS, patient experience is incredibly important to us. Reputation has been an essential partner, helping improve online visibility into consumer sentiment and providing actionable insights that enable meaningful changes to improve the patient experience. We also use this information to recognize extraordinary caregivers and to celebrate our successes. Our purpose – to help people get well and live healthier – depends on a positive reputation so we are very proud to be recognized as a reputation leader.”

Tomi Galin,
Executive Vice President, Marketing and Communications
Community Health Systems

Tips for Healthcare Systems

Physicians and Facilities: Improve your Reputation Scores

Reputation Score is a key metric for improving the patient experience. In particular, review volume and sentiment are important signals that say something about how much patients are talking about you and what they are saying. To make those signals more valuable, providers should request reviews, respond to them, and use patient feedback to improve the patient experience. Doing so grows review volume, sentiment, and recency, all of which influence Reputation Score.

Establish a Feedback Hub to Analyze Patient Sentiment

Our report has identified key strengths and areas for improvement for the industry overall. What are patients saying about your facility or physician practice, and how are you using that insight to improve? The best way to find out is to collect that feedback from structured (e.g., surveys) and unstructured (e.g., social media) data sources into a single hub. If you only analyze a single channel of feedback, you may not observe the significance of a particular issue.

Bringing all sources of feedback data into a single hub enables you to understand the voice of the customer. For example, by analyzing CAHPS, social media comments, and call center surveys together, you will see a more complete picture. Only then can you prioritize where and how to make changes.

Optimize Google Business Profiles

Google Business Profiles are as critical as your own website. Consumers want to schedule an appointment, start a virtual visit, or send a message to staff right within the Google Business Profile. Note also how important it is for physicians to populate their Profiles with personal information such as a biography, specialties, and photos, as well as patient reviews. Not only is it essential that physicians keep their profiles up to date, but they also need to humanize their brands. Physicians need to monitor reviews, respond to them, and request them from patients to improve care.

Enact an Employee Experience Program

An employee experience program is a comprehensive and proactive approach to improving retention by constantly gauging the pulse of employees, listening to feedback, and improving the overall experience. That experience includes compensation, but also many other elements that contribute to a positive environment, such as uplifting employees and communicating transparently. This program needs to extend to providers and staff. Our report has uncovered a number of problems that patients have with the administrative staff. What kind of experience are staff getting from the facility and the physicians they work with? The only way to find out is to ask them and act on the feedback they give.

About Reputation Score

Measured on a scale of 0 to 1,000, Reputation Score is an index of the digital presence of business locations spanning more than 70 industries. Reputation Score looks at a location's sentiment, visibility, and engagement across nine elements.

We calculate Reputation Score using artificial intelligence to take a snapshot of everything customers say about a brand.

We examine patient surveys. But we also look at the harder-to-track, but more visible to consumers, unstructured data that other tools overlook, such as tweets, Facebook posts, and other comments that appear on social channels every day. Unlike other report cards, Reputation Score delivers actionable insights that help providers improve operations and satisfy patients.

Reputation Score's nine elements:

Star average. A strong star rating demonstrates a commitment to customer service and can influence customers' decisions to choose a location.

Review volume. This represents the total quantity of reviews – both positive and negative – that have been written about a business. Review volume has a significant impact on locations' search rankings and Reputation Score.

Review recency. Recently published reviews convey that the business is requesting feedback from their customers and that their customers are active and engaged. Newer reviews also help increase search rankings for locations.

Review spread. The spread refers to the total number of sites on which reviews are being posted – from Google and Facebook to dozens of industry-specific review sites. The broader the spread, the better.

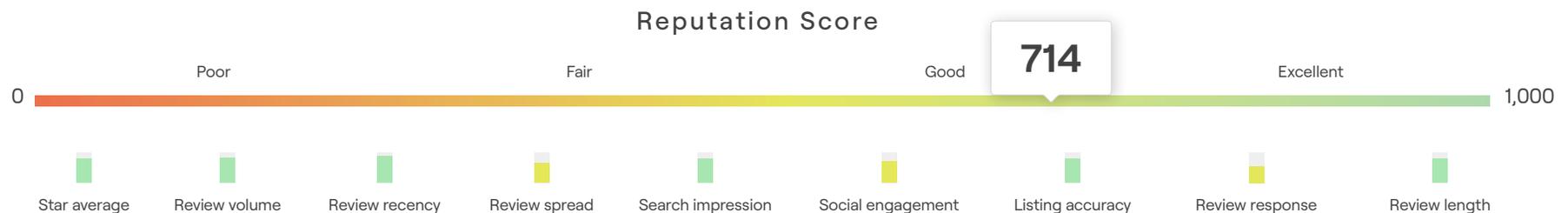
Search impressions. This plays a role in how businesses look when customers search for locations on Google or other search engines. The higher a business or location appears in the search results, the easier it is for consumers to find it.

Social engagement. Engaged users on social networks are more likely to become customers.

Listing accuracy. Accurate listings on sites attract more customers.

Review response. Responding to reviews demonstrates a commitment to customer experience and helps influence conversations about a brand.

Review length. The length of your reviews indicates how invested customers are in a business. It is a measure of how much time they were willing to spend giving feedback.



About Reputation

Reputation (formerly Reputation.com) changes the way healthcare organizations gather and act on patient feedback to drive decision-making and enhance Consumer Experience programs. The company is backed by Ascension Ventures, Bessemer Ventures, Heritage Partners, Kleiner Perkins, Marlin Equity Partners, and trusted by over 250 integration partners. Visit reputation.com to learn more.

 Contact [Reputation's dedicated Healthcare Team](#) to learn more.

