

 **Reputation**

REPUTATION REPORT

Healthcare Industry





What Does It Take to Be a Top Healthcare Provider?

What do consumers think of healthcare providers? The 2023 Healthcare Reputation Report has answers.

We:

- **Analyzed over one million** patient reviews across 200,000 physicians and hospitals.
- **Surveyed consumers** to understand how they seek care and what factors influence their selection of a hospital or physician.
- **Ranked the 30 largest U.S. healthcare systems using our Reputation Score**, the only industry metric evaluating solicited and unsolicited feedback from patients to determine a healthcare provider's reputation.

Read this report to know who the industry's leaders are and what consumers think of healthcare providers.

The Power of Feedback is Growing Throughout The Patient Journey

Key Findings:



More patients use reviews to make decisions

Consumers who read reviews

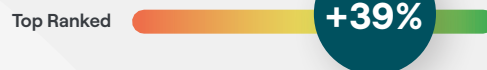


- **About 86% of consumers say** they read online patient reviews, which is up from 72% last year.
- **73% say a minimum star rating of 4 stars** is needed for them to engage with a provider or physician.
- **65% say they have selected** one healthcare provider and/or location over another based on online ratings and reviews.

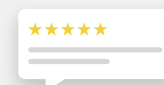


Patient sentiment matters more than ever

Patient Sentiment

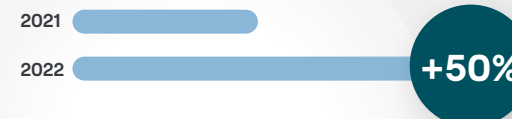


- **The top ranked healthcare systems** in our analysis outperformed everyone in patient sentiment by 39 percentage points.
- **What are the drivers of positive sentiment?**
 - Bedside manner, staff and competence of the physician.



Patients are posting more reviews

Review volume



- **Review volume** is up nearly 50% from 2021.
- **39% of consumers say** a positive experience prompted them to leave a review versus 24% that said they had a negative experience. Extremes of experience will prompt unsolicited reviews.

Top Healthcare Providers Engage with their Patients in the Feedback Loop

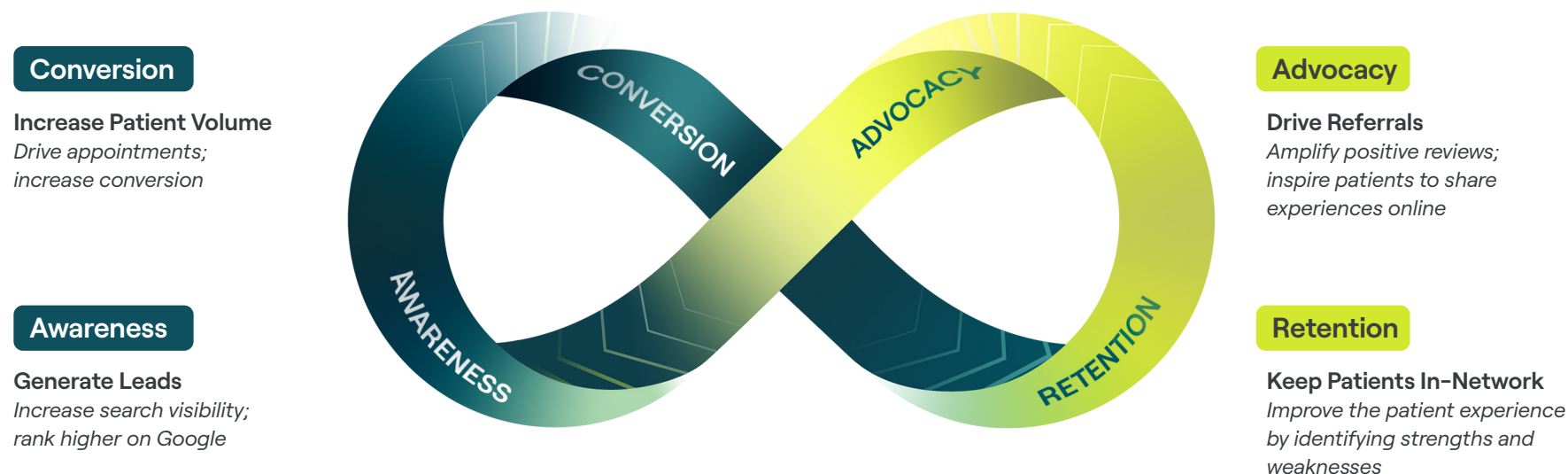
As we continue to come out of the COVID-19 pandemic, healthcare providers are beginning to rethink how they engage with patients throughout their experience. And they're coming to grips with reality: the patient experience is complex and fragile.

It's complex because the experience extends beyond the quality of clinical care. It extends to every conceivable touchpoint with a patient inside the four walls of a hospital and beyond – from the moment someone searches for care online to long after they receive service and pay a bill. The ease of finding a doctor, the efficiency of check-in, the empathy displayed by each member of the staff – all of these interactions, and much more, shape patients' perceptions of their care.

But the complexity of the experience makes it fragile, too. One misstep can undo the entire experience. A patient can have a positive overall experience, but if one thing goes wrong – say, a bad experience with a staff person or a clumsy registration process – a provider's rating or review can be affected negatively. And this is important because 86% of patients say they read online reviews, and 73% say a minimum star rating of 4 stars and up is necessary to consider a facility or physician. Experience officers need to understand and manage all aspects of the experience very carefully. And doing so starts with listening to patient feedback.

Healthcare leaders – both hospitals and physicians – are listening to feedback. Responding to it. Learning from it. And acting on it to improve the quality of the patient experience across the entire patient journey, from the moment someone researches care options to well after they receive care.

Patient Interactions Are Dynamic



This is important, especially at a time when the mentality of the industry is changing from patient volume to patient value. Amid the rise of value-based care, providers need to think about how they can attract and keep high-value patients. Managing feedback is the key. Leaders are engaging with customers across the customer journey, that starts with new patient acquisition and continues through to

return of loyal patients. Doing this achieves benefits ranging from improving retention rates to driving referrals.

Our 2023 Healthcare Reputation Report discusses how to get started by tapping into the power of feedback.



“ Using feedback from our patients – and often their family members, too – helps guide continuous improvement in our services, customer experience and overall satisfaction. **We're proud to be recognized in the 2023 Healthcare Report by Reputation for efforts that have amplified the voice of the customer and for our work to use those insights in ways that can enhance customer acquisition, experience and loyalty.”**

Tomi Galin

EVP, Corporate Communications and Marketing,
Community Health Systems

2.

The Importance of Google Business Profiles

We have some good news and bad news.

The good news: people are actively online looking for care, especially on Google, where nearly every provider has a presence.

Bad news: people looking for care are probably not finding providers on their Google Business Profiles.

And since most Google searches stay on Google (instead of resulting in clicks to a website), providers have a huge opportunity to improve their profiles.

Google Rules

Our consumer survey showed that Google is the most popular source for searching for a physician or hospital (tied for first with insurance portals) – more popular than provider/physician websites, healthcare-specific sites such as WebMD and Healthgrades, or social media. Google played an even larger role in the search for immediate care.

So, we studied consumer activity on hospitals' and physicians' Google Business Profiles, which are crucial starting points for learning about care options.

We found:

-20%

Hospital Views of Profiles are down 20% since January 2022. Actions (defined as a click to call a location, visit a provider's website, or get directions to a location) dropped 24% since January.

The drop in views and actions tells us that people are not finding providers' profiles and using them. These findings do not surprise us. Unfortunately, hospitals and physicians typically do not manage their Profiles with accurate and useful information. And yet, consumers want to use them to find out about care, schedule an appointment, start a virtual visit, or send a message to staff.

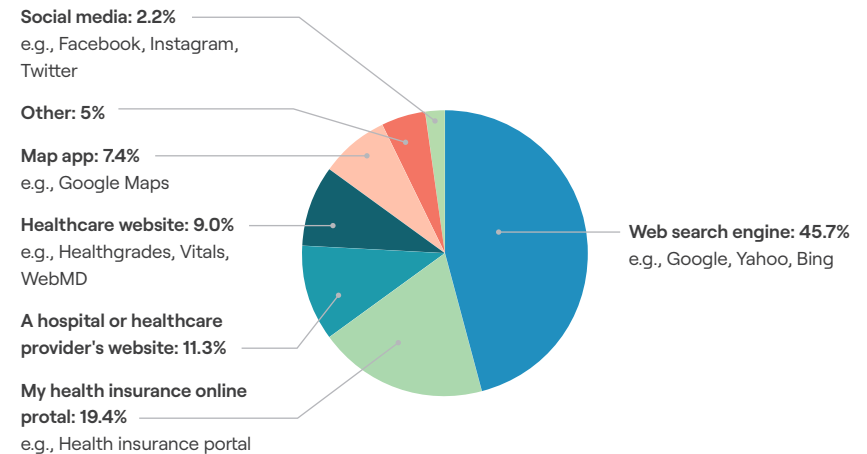
-12%

Physician's views dropped 12%

-17%

Physician's actions dropped 17%

Where Care Seekers Begin their Search for Immediate Care



What the healthcare industry must do:

Treat Google Business Profiles like websites. Our findings show that hospitals and physicians need to make their Profiles more findable with content optimized for search and more useful by providing accurate, helpful information. This is especially crucial for consumers seeking immediate care: our findings show that 45% of consumers used search engines like Google.



3.

What Patients Think of Providers

The Reputation Data Science team examined over one million patient ratings and reviews of the physicians and hospitals from the largest U.S. healthcare systems.

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: 2020-2022

More people are sharing their care experiences online, and sentiment is improving.

Review volume is up

+53%

For physicians, review volume is up 53% since 2021 and 132% since 2020.

+38%

For hospitals, review volume is up 38% since 2021 and 90% since 2020.

Sentiment is improving

4.6

Physicians achieved an average star rating of 4.6 in 2022. This is an increase from 4.54 in 2021.

3.7

Hospitals achieved an average star rating of 3.7 in 2022. This is an increase from 3.57 in 2021.

These findings are especially important because reviews influence perception: **86% of people seeking care say they read online reviews**, up from 72% in 2021.



What the healthcare industry must do:

Continue asking for reviews

Continue asking and respond to reviewers to let them know you are listening. Feedback fuels reputation. And according to Google, responding to reviews is a best practice because more reviews mean more visibility when people are searching on Google. An analysis of Reputation's top healthcare systems showed that healthcare providers who utilized automatic review requesting received four times more new reviews per month and have 20% higher average star ratings.

Learn from reviews.

The fact that sentiment scores have increased is encouraging. Hospitals and physicians can improve even more by systematically learning from reviews and improving. This means, among other things, studying patient feedback to identify areas where you can improve, which results in higher star ratings. But all that can be a challenge for care providers without the help of technology to make the process more efficient. Monitoring and responding to reviews can be time-consuming and labor-intensive, especially across multiple platforms. This is one reason why your patient experience (PX) team needs to take on the role.



What's Going Well:

Customer Service, Sales, and Staff

Below, we share some specific strengths and areas for improvement across the board. Later in this report, we discuss how to make improvements systematically through a patient experience feedback hub.

People on the front lines make a difference

Positive reviews underscored how much people on the front lines make a difference in a positive patient experience.

- **For hospitals,** the top three drivers of positive sentiment were (in order) staff, bedside manner, and competence of the physician.
- **For physicians,** the top three drivers were almost identical: bedside manner, staff, and competence of the physician.

It's clear: patient experience starts with healthcare workers on the front lines – from the physicians and nurses who provide clinical care to the staff who check people into the hospital and manage billing.

Reputation Insights: **Sentiment**

HOSPITALS

Staff

67

Mentions: 306,409

Impact: +0.07 ★

Bedside Manner

80

Mentions: 138,448

Impact: +0.06 ★

Doctor Competence

66

Mentions: 12,041

Impact: Low ★

PHYSICIANS

Bedside Manner

87

Mentions: 340,782

Impact: +0.19 ★

Staff

82

Mentions: 219,175

Impact: +0.11 ★

Doctor Competence

67

Mentions: 56,463

Impact: 0.03 ★

Clear Trend: Quality of Care

When we dug deeper into the ratings, we were impressed by how often patients mentioned both quality of care and the compassionate, attentive approach of the caregiver.

We noticed another recurring theme: patients noticed when providers took whatever time was needed to provide attentive care rather than rushing their patients out the door.

These comments were illustrative:

- *"All the nurses were very caring. The staff was very friendly and knowledgeable. . .I could not have asked for a better group of people."*
- *"Helpful staff, compassionate nurses."*
- *"My anesthesiologist was great & reassuring."*
- *"Very kind, knowledgeable, and always has my best interest in mind."*
- *"Always attentive and takes whatever time is needed to take care of the patient's needs."*
- *"His staff took their time to examine my ears, relieve my problem, and make me feel so much better."*

We also noticed that when patients mentioned providers by name, they typically did so in the context of a positive review. The human touch matters.

★★★★★ April 27

Caring and compassionate

His staff took their time to examine my ears, relieve my problem, and make me feel so much better.



What the healthcare industry must do:

- **Find out who your superstars are** – the people who are getting cited by name. Uplift them. Learn from them.
- **Uncover the nuances behind the ratings** to understand why certain aspects of the administrative staff, clinical care providers, etc., are getting praised. That way, your entire team can teach each other. Remember intangibles such as being attentive and having a reassuring tone can make all the difference.



What Needs Improvement:

Wait Times, Emergency Care and Administrative Process

- **Negative sentiment drivers for hospitals include** wait times, emergency care, and pain management. When wait times and the emergency room experience were mentioned in reviews we analyzed, star ratings were typically extremely low – so feedback in those two categories alone could be especially damaging to star ratings for hospitals and physicians.
- **An emergency room visit** often means heightened emotions for patients and family members, increasing the likelihood of a negative experience. Hospitals that do not request reviews after an ER visit are leaving it up to the vocal minority of those who post unsolicited reviews. On the other hand, hospitals that solicit feedback from all patients are more likely to have higher average ratings.

Reputation Insights: **Sentiment**

HOSPITALS

Wait Time

8

Mentions: 73,078

Impact: -0.05 ★

Emergency

5

Mentions: 47,112

Impact: -0.04 ★

Pain Management

46

Mentions: 12,565

Impact: -0.02 ★

PHYSICIANS

Getting an Appointment

15

Mentions: 15,526

Impact: Low ★

Affordability/Value

82

Mentions: 4,275

Impact: Low ★

Administrative Process

3

Mentions: 4,834

Impact: Low ★

4 Ways to Put Feedback to Work to Improve the Patient Experience

1. Improve the ER experience

Our analysis of reviews reveals that hospitals can improve the ER experience in areas such as staff interactions. That coupled with improvements in waiting area amenities like WiFi can impact the ER experience. We noticed criticisms of the professionalism of ER staff, ranging from rude receptionists to staff who lacked empathy. This feedback underscores the importance of providing a great patient experience throughout the entire journey to receive care. Improving staff-person interactions and providing amenities might not reduce wait times, but they could improve the experience overall.

2. Manage appointments more effectively

Scheduling a doctor's appointment remains a notoriously frustrating experience, largely because of long wait times to get in to see the doctor. One alternative for physicians to explore is relying more on tools to help patients treat issues that may not require an appointment in the first place. For instance, physicians and their staff might rely more on patient portals to answer questions that are better managed without an appointment. Make sure to mine your reviews for opportunities to engage and respond to feedback on appointment scheduling to show your willingness to learn from patient feedback and improve your scheduling tools and responsiveness.

3. Communicate value for care more effectively

People are less likely to complain about the affordability of care when they believe they are getting valuable care. Physicians do not always communicate the outcomes they are delivering as well as they could. Moreover, being more attentive and compassionate could provide the intangible that makes a person feel they are valued.

4. Request Feedback Consistently to Increase Share of Positive Reviews

Healthcare systems that have used Reputation's review requesting tool have gone from 78% to 88% positive review share and received 12,000 5-star ratings. Asking for feedback unlocks that silent majority of patients that had a great experience but wouldn't otherwise have written a review.

4.

The Employee Experience

Providers [continue to experience extreme levels of stress](#) as the healthcare industry slowly emerges from the darkest days of the COVID-19 pandemic.

Two out of five nurses say that their mental health is worse now than it was during the peak of COVID-19. Burnout remains as big a problem as ever, compelling 200,000 healthcare workers to [quit their jobs in 2020-21.](#)

The loss of physicians, nurses, and staff in recent years points to a major vulnerability in the U.S. healthcare industry.

To dig deeper into how providers feel about their experience, we analyzed 373,000 employee reviews of hospitals. We divided our data set into nurses and administrative staff. In both cases, we reviewed feedback from the frontline of managing the patient experience.

Here's what we found:

Employee Reviews

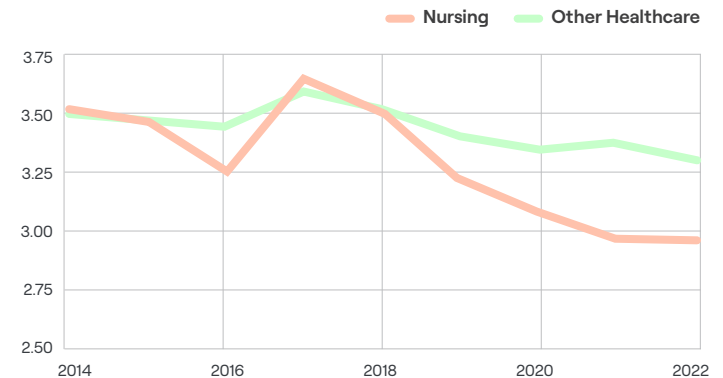
Average ratings from healthcare employees and nurses have been trending down over time, especially since 2018. Nursing reviews have been dropping at a higher rate.

The drop between 2021 and 2022 was much less severe than in previous years but is still trending down.

Key findings:

- **The top 3 categories mentioned in employee reviews we analyzed are People/Team, Compensation and Management.**
- **Staffing** (which pertains to issues such as having enough staffing and managing support resources effectively) is talked about significantly more among nurses and is an overall negative sentiment driver for nurses.
- **Both staff and nurses speak negatively about compensation and management.** Criticisms of management often focused on an apparent lack of caring and empathy to the point of employees feeling that they are being gaslighted by managers who ignore obvious signs of stress and toxic work environments. We noted that some complaints about inadequate compensation also went hand in hand with comments about being overworked – in other words, it's not just that employees feel underpaid, they feel undervalued.

Avg. Rating of Employee Reviews Over Time



What the healthcare industry must do:

Enact a voice of the employee program to understand how your people are doing. Our own analysis of ratings and reviews shows that healthcare workers have an inordinately strong impact on patient sentiment. And data from Partnership for Public Service and Boston Consulting Group [indicates](#) that a one-point improvement in employee satisfaction scores results in a half-point improvement in patient satisfaction scores. So, it's essential to empower employees and reward them if you want to keep them and continue to earn high ratings for a great experience.

5.

Reputation Scores Are Improving

Good news: Reputation Scores are improving for hospitals. Hospitals improved their Reputation Scores by 31 points.

Not-so-good news: physicians' scores have remained flat.

Why the increase in Reputation Scores?
Here are the main factors:

Why Reputation Scores are Going Up

Hospitals

Sentiment and review volume increased throughout 2022 and was especially high between August and December, which improved their review recency score. Hospitals also did a good job of responding to reviews as the volume increased.

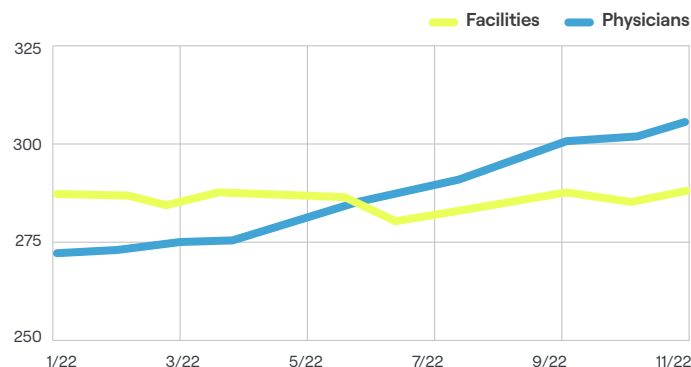
- **Sentiment** – as measured by star rating – demonstrates a commitment to customer service and can influence customers' decisions to choose a location.
- **Review volume** – the total quantity of reviews – has a significant impact on locations' search rankings and Reputation Score.
- **Recency matters** because recently published reviews convey that the business is requesting feedback from its customers and that its customers are active and engaged. (Newer reviews also help increase search rankings for locations.)

Responding to reviews demonstrates a commitment to customer experience and helps influence conversations about a physician or provider.

Physicians

It's clear that physicians need to work harder on requesting reviews and use the feedback to improve sentiment. Sentiment and review volume improved slightly in 2022 but experienced a drop between July and September before improving again by the end of the year.

Reputation Score Trend



What the healthcare industry must do:

Reputation Score is a key metric for improving the patient experience. So, hospitals and physicians need to pay close attention to improving areas that influence Reputation Score, such as review volume, recency, and sentiment. How? By requesting feedback through surveys and reviews throughout the patient journey, responding to them, and using that feedback to improve the patient experience. Those actions boost volume, recency, and sentiment – all of which, in turn, influence Reputation Score.



6.

Rankings

We analyzed the 30 largest health systems in the United States and ranked them by Reputation Score.

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 review sentiment to review volume. (See the section About Reputation Score for more detail.)

The Top 30 Healthcare Systems

Rank	System	Reputation Score	Sentiment	Visibility	Engagement
1	Community Health Systems	726	68	75	97
2	HCA Healthcare	683	62	73	91
3	AdventHealth	678	60	75	76
4	Universal Health Services	671	57	74	90
5	Sutter Health	574	40	70	97
6	Baylor Scott & White Health	561	42	68	81
7	Ascension	548	38	70	82
8	University of Texas System	545	46	62	67
9	Tenet Healthcare Corp.	539	33	71	90
10	CommonSpirit Health	538	47	65	71
11	University of Pittsburgh Medical Center (UPMC)	531	31	70	95
12	Kaiser Permanente	526	36	68	88
13	Lifepoint Health	525	39	70	41
14	Banner Health	522	34	67	99
15	Intermountain Healthcare	515	45	66	74



We are honored to be ranked among the top healthcare providers in the nation on Reputation's 2023 Healthcare Report. This recognition shows our efforts to listen to and engage with patients on the digital channels they prefer are paying off.

We will continue refining tools and practices to deliver quality care and great experiences throughout northern California."

Nolan Perry

Head of Reputation and Engagement
Sutter Health



After 14 months of close partnership between our Intermountain and Reputation teams, earning this top 15 distinction represents enormous progress that we also see in real-world results that generate tremendous value for the business and our patients.

Carey Van Wagoner,

Canyons Region Marketing Director,
Intermountain Health;

Andy Miller,

Digital Marketing Director,
Intermountain Health

The Top 30 Healthcare Systems (continued)

Rank	System	Reputation Score	Sentiment	Visibility	Engagement
16	New York Presbyterian Healthcare System	505	35	72	37
17	University Hospitals Health System	504	31	69	67
18	University of California Health	501	54	61	54
19	Corewell Health (Formerly Spectrum Health & Beaumont)	495	30	70	65
20	Penn Medicine	493	28	70	59
21	Advocate Health (Formerly Advocate Aurora Health & Atrium Health)	481	32	70	34
22	Mount Sinai Health System	481	25	69	62
23	Trinity Health	480	41	63	65
24	Northwell Health	473	36	69	20
25	Cleveland Clinic Health Systems	473	31	71	10
26	Bon Secours Mercy Health	467	31	69	16
27	Providence	453	34	65	21
28	NYC Health + Hospitals	440	27	71	10
29	Mass General Brigham	438	46	59	23
30	Mayo Clinic Health System	367	38	52	8

rr At Banner Health, we are deeply committed to providing compassionate, patient-centered care, and **we are thrilled to be recognized in the 2023 Healthcare Report by Reputation. This recognition reflects our ongoing efforts to put patient feedback into action, constantly improving our services to provide the best possible patient experiences.**

We are proud to have earned the trust and loyalty of our patients, and we will continue to prioritize their needs and exceed their expectations in all aspects of care.”

Valerie Monet

Sr. Director Customer Experience Strategy & Insight

Banner Health



Reputation Rankings Insights:

Leaders outperformed the laggards in sentiment, engagement, and visibility.

For sentiment, the difference between leaders (the top five healthcare systems) and laggards (the bottom five healthcare systems) was 39 points. Sentiment is especially important because of all the elements of Reputation Score, sentiment has the biggest impact.

Engagement is the biggest difference between leaders and laggards. The gap between leaders and laggards was 83 points for engagement. Leaders engage more with patients and respond to reviews much better than laggards do.

Visibility had the lowest difference at 14 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.



7.

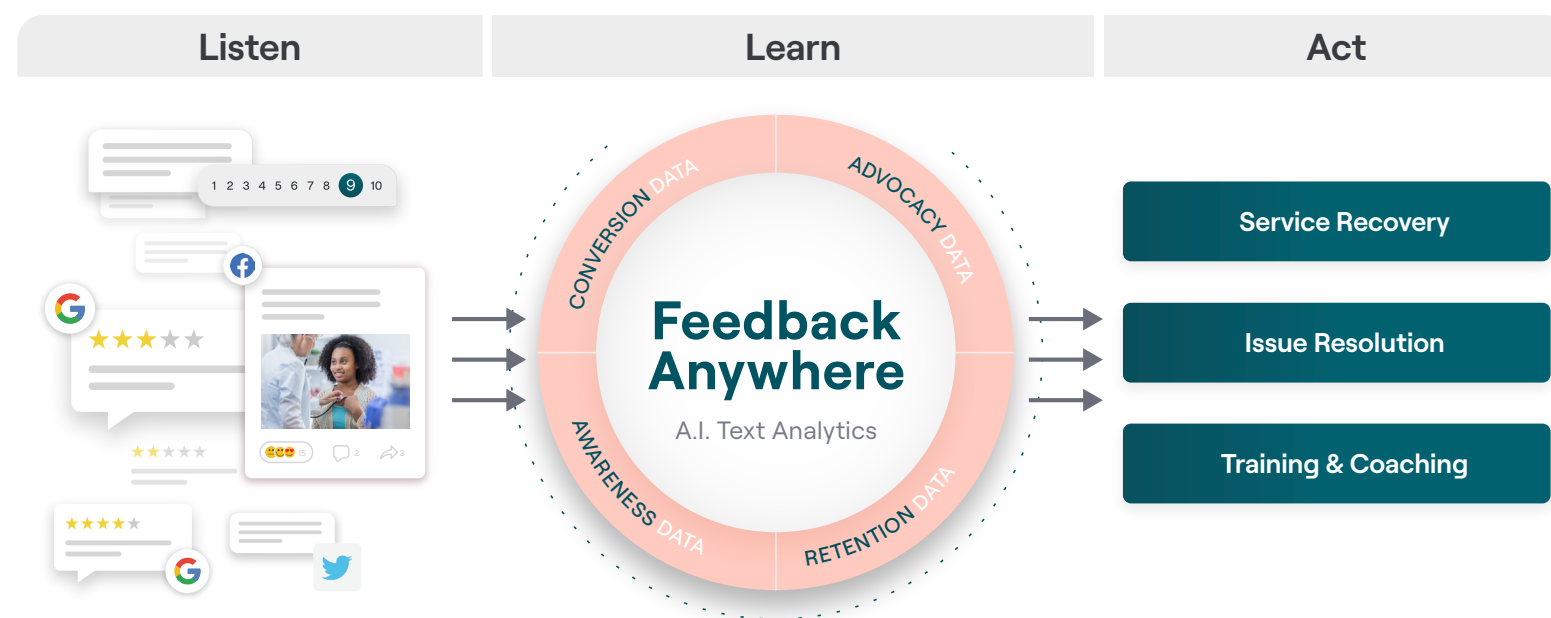
What's next?

Our report has identified key strengths and areas for improvement for the industry overall.

But how will you get an accurate picture of what patients are saying about your facility or physician practice, and how are you going to use that insight to improve?

Establish a Feedback Hub

The best way to get an accurate view of what patients are saying is to collect 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 full significance of a particular issue.



Bringing all sources of feedback data into a single hub enables you to understand the voice of the customer (VoC). At Reputation, we refer to this process as “Feedback Anywhere.”

Feedback Anywhere from Reputation provides a complete view of the patient experience.

It doesn't matter where the feedback comes from — surveys, social media comments, ratings and reviews, messaging — we collect it in one hub and analyze sentiment across dozens of categories. Each channel enriches Feedback Anywhere and contributes to a more robust understanding of VoC.



8.

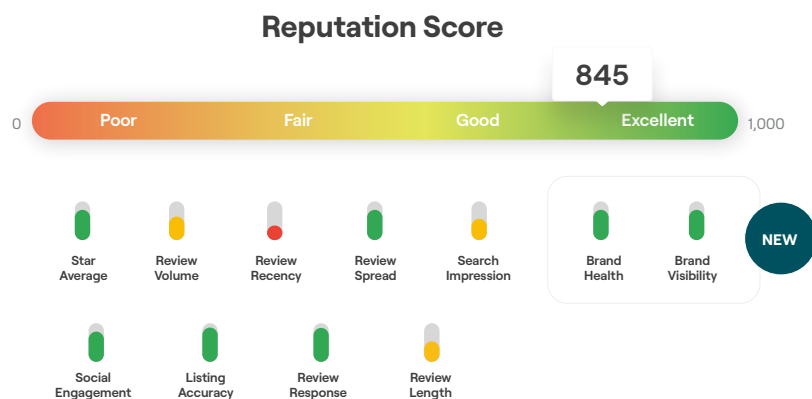
About Reputation Score

Measured on a scale of 0 to 1,000, **Reputation Score** is the leading metric of a healthcare provider's true reputation.

Reputation Score takes into account a location's sentiment, visibility, and engagement across nine elements.

Reputation Score's nine elements are:

- **Review sentiment.** This 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 its customers and that its 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 wider 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 consumer discussions 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.



A snapshot that features everything

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

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.

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.

