

 Reputation

2021 Healthcare Reputation Report



The Reputation Data Science team analyzed

348,000 customer reviews,

Across 113,000 physicians and provider facilities,

And analyzed the 25 largest healthcare systems using our proprietary Reputation Score.

The Results Are In:

The healthcare industry faces a digital reckoning

Patient ratings/reviews are the single-most important factor influencing Millennials' choice of physicians and facilities next to insurance accepted and proximity — **but a shocking 50% of healthcare facilities and 65% of physicians had zero reviews in 2020.**

Zero Reviews in 2020

50%

of healthcare facilities have zero reviews in 2020

65%

of physicians have zero reviews in 2020

Healthcare facilities and physicians need to connect with Millennials.

Healthcare facilities and physicians who manage their Reputation Scores are best positioned to connect with Millennials. Half of Millennials search Google reviews of health providers — and **healthcare facilities with strong Reputation Scores have 1,290% more conversions on their Google My Business (GMB) listings** (click to call, find directions to locations, and visit their websites). Physicians with strong Reputation Scores experience 540% more conversions.

Google Conversions

+540%

for physicians with a high Reputation Score

+1290%

for healthcare facilities with a high Reputation Score

Reviews make all the difference.

The healthcare systems with highest Reputation Scores accumulate an average of 232% more reviews than the laggards. **A provider's front-line staff matters more than ever. Staff and bedside manner are the two main drivers of positive sentiment.** Wait times and emergency room care are the two biggest drivers of negative sentiment.

Review volume

+232%

Increased review volume for health systems with a high Reputation Score

Contents

The State of the Industry	5
The Consumer Journey	8
Reputation's Proprietary Data Reveals the Covid-19 Effect	20
A Digital Reckoning for the Healthcare Industry	28
The Top 15 Healthcare Systems	39
What Does it Take To Be a Top Healthcare System Brand?	44
Healthcare Needs Reputation Experience Management	48
Elements of Reputation Score	52
About Reputation Reports	53
About Reputation	53

The State of the Industry



Healthcare providers are rapidly adapting to a new normal shaped by a pandemic that has shaken the entire industry to the core. Physicians and hospitals alike have accelerated the adoption of virtual care, and have instituted new care protocols. Meanwhile, patients have continued to give public feedback on the quality of care and service, ranging from the cleanliness of facilities to the quality of virtual care.

At Reputation, we tracked that feedback and analyzed the 25 largest healthcare systems in the United States to find what the top 15 reputation leaders have in common in our 2021 Healthcare Reputation Report.

Healthcare Superheroes

The 2021 Healthcare Reputation Report is an essential resource to understand how reputation management is evolving in a digital-first world forever changed by a global pandemic. The report includes two parts. First, we did an analysis of what consumers say is important in their selection of a care provider – for both acute and ambulatory needs. The second part of the report is a ranking based on online reputation. For our 2021 ranking, we chose to focus on the acute care facilities of the 25 largest healthcare systems because acute care facilities have been at the epicenter of the pandemic. They are also at the forefront of a number of important changes transforming healthcare, notably the rise of virtual care. Additionally, acute care facilities, for the most part, remained open throughout 2020, whereas many ambulatory services were put on hold during lockdowns, which were applied inconsistently across various states.

Frontline caregivers have put their lives at risk to care for their communities during this pandemic. As the industry grapples with the longer term impact of the pandemic, caregiver burnout remains one of the biggest concerns. The good news is that patients have a newfound appreciation for the caregivers at the center of the crisis. In fact, our analysis of Covid-19 related

reviews found overwhelmingly positive sentiment from patients. While fear of the virus remains high, the response from health systems around the country has been well-received by patients. As this report shows, patients have responded favorably to the care they have received. As we discuss in the section, “Reputation’s Proprietary Data Reveals the Covid-19 Effect,” patients have given acute care providers high marks in some critical areas, such as staff, bedside manner, and cleanliness.

When we took a closer look at patient ratings and reviews, we uncovered some impressive feedback, such as:

- “Office staff, nurses and doctors were fantastic.”
- “Their bedside manners were superb and their infection control cleanliness was soooooo good I felt so safe and comfortable.”
- “ER Staff and staff was excellent! Felt very safe and cared for. Everyone wore a mask and gave me great care. Thank you.”

This is the kind of feedback any organization would envy.



Innovation is a cornerstone of Banner's mission and we're fortunate to have Reputation as a partner as we shape the future of healthcare. Ranking among the national reputation leaders is a testament to the work we are doing to improve the Digital Front Door for patients and earn loyalty in the communities we serve.

— Alexandra Morehouse,
Chief Marketing Officer, **BANNER HEALTH**



The Consumer Journey

In an uncertain time, one truth remains clear: the consumer shapes the reputation of the healthcare provider, and that process begins online.

Even before a person becomes a patient, they form opinions of facilities and physicians during the search for online care. Those opinions are influenced by the ratings/reviews they read. Patients read reviews and ratings (and share them) throughout the entire journey from awareness to care.

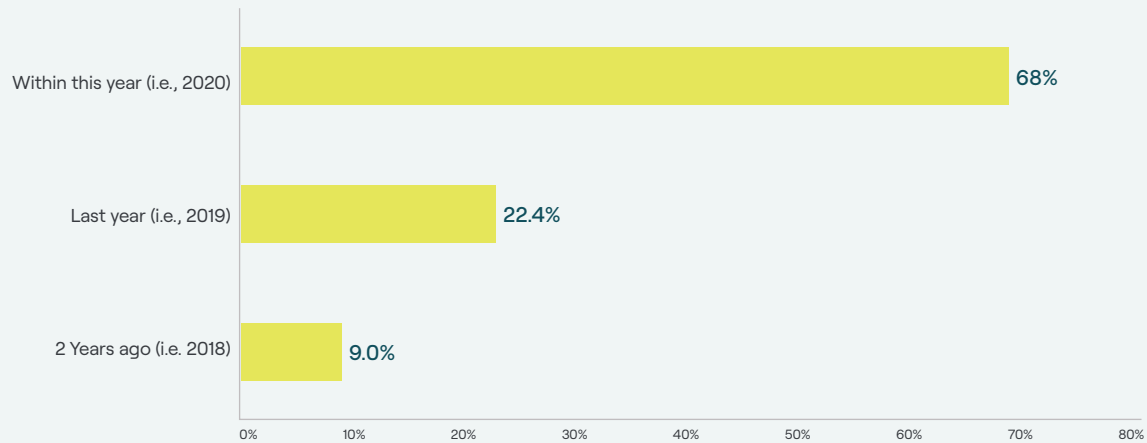
What does that journey look like today?

To dig deeper, we partnered with research firm YouGov to survey 1,000 U.S. adults aged 27-64 in order to understand how they make healthcare decisions. We wanted to know more about the factors influencing their choice of a healthcare facility or physician since the start of the pandemic. We also reviewed consumer interactions (such as views and clicks) with healthcare providers' Google My Business listings. That's because [GMB listings are the Number One factor influencing the visibility of any business across the board.](#)

Here's what we found.

1. The Search for Care Begins Online

Last time Internet was used to look for or find information about health provider.



Q:

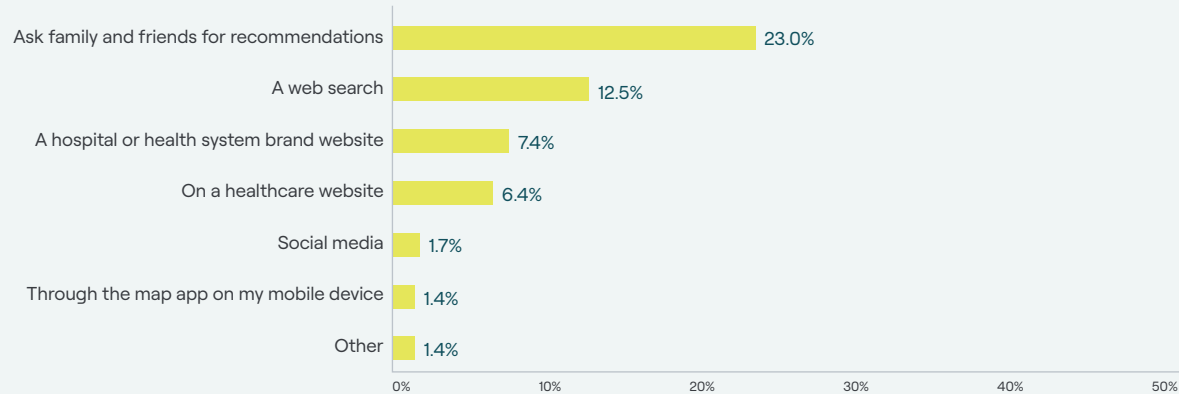
When, if ever was the last time you used the internet to look for or find information about a healthcare provider?

68%

of the population say that they went online to find information about a healthcare provider in 2020, according to YouGov.

When people look for a primary care doctor, they're more likely to do a web search as their starting point more than any other source with the exception of insurance portals and recommendations from friends and family.

Starting search for primary care doctor



Imagine you were looking for a primary care doctor. Which ONE of the following would you use to start your search?

+23%

23% Patients ask family and friends for recommendations but our data also shows more patients are taking action online. In the past year, conversions on GMB have increased by 25%

The Reputation Data Science team also examined how people have interacted with healthcare locations' and physicians' GMB listings during the pandemic. We studied listings data for 50,000 locations across 106 different healthcare systems in the United States and learned that:

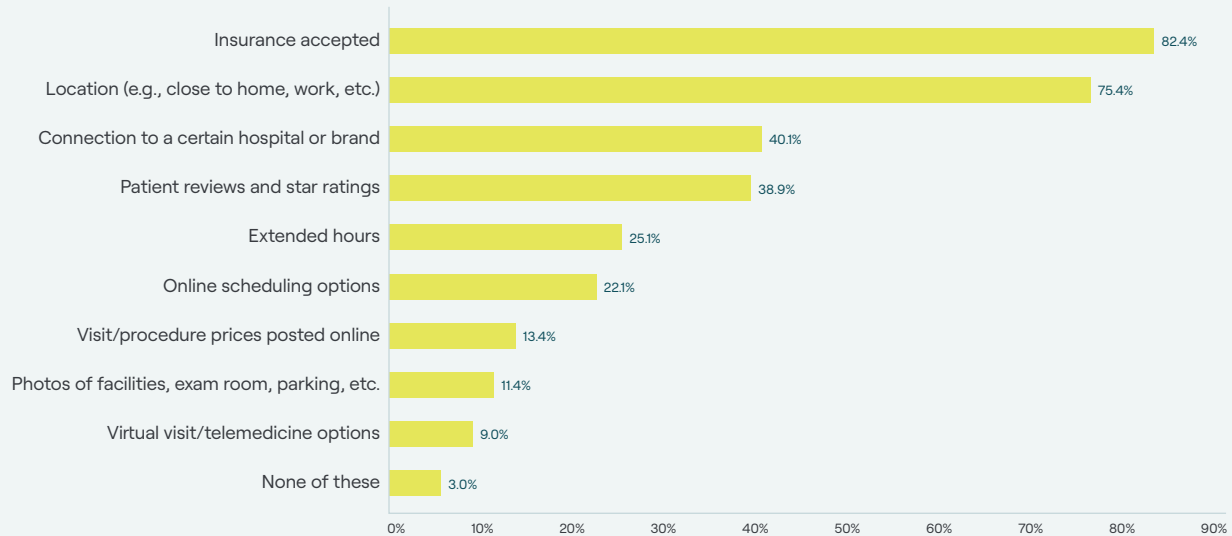
- The way patients interact with GMB has changed. Conversion rates (measured by how often someone clicks on a GMB listing to call a location, visit a website, or get directions to a location) increased by 25% when we compared the April-December 2020 time frame to January-February 2020. The uptick shows just how actively potential patients are using GMB listings as a jumping-off point for finding a provider. GMB click-per-view conversion rates provide a sense of how patients explore GMB pages. We can use them to understand how much time is spent just browsing for information versus converting (clicking as above). Before the pandemic, patients would click less often for every time they viewed a GMB page. Now, their click-per-view has increased dramatically, suggesting patients are relying more on GMB as not just a research source, but to get information and make a decision.

- Patients are interacting far more via phone (clicking to call a location from a GMB listing), suggesting that people are calling ahead for appointments and COVID-19 information and protocols at greater numbers than before.

As consumers increasingly rely on digital channels, healthcare facilities and physicians need to ensure that their GMB location data is accurate and that GMB listings contain essential information about topics such as insurance accepted and vaccine availability. For more information, see our recent blog posts, ["Google Offers New Insurance Attribute for Healthcare Providers,"](#) and ["The Covid-19 Vaccine Is Here – What's Next for Healthcare Leaders?"](#) Both of these posts discuss the importance of relying on GMB listings to share essential information for people searching for care.

2. Patients Consider a Wealth of Information

Considerations when choosing a healthcare location online



Which if any of the following factors are important when choosing a healthcare location online?

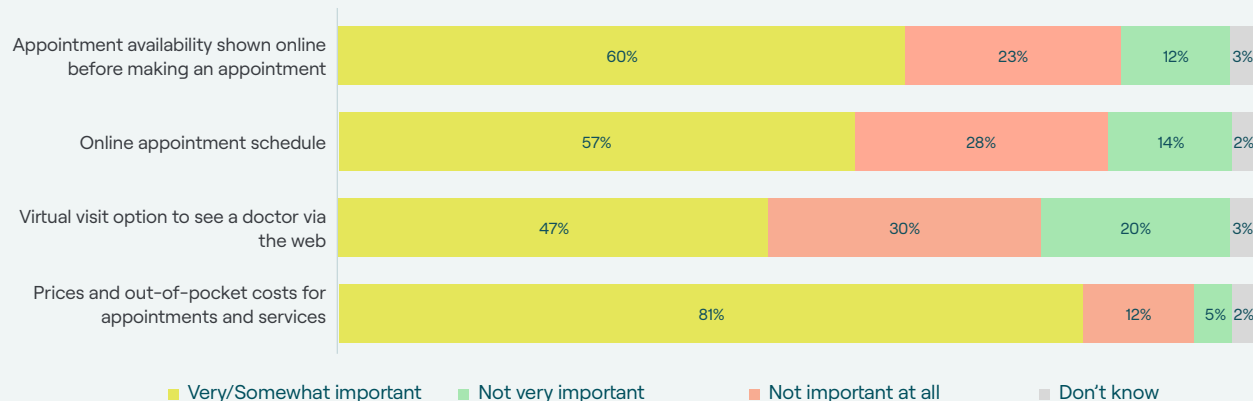
38.9%

of patients consider ratings and reviews when choosing a healthcare location online.

Patients consider a wide range of information when they look for a physician or a healthcare organization, with the most important being:

- Insurance accepted
- Location
- Connection to a certain hospital/brand
- Ratings/reviews

Important considerations when selecting a healthcare location or doctor



How important, if at all, are each of the following options when selecting a doctor or healthcare location?

+57%

of consumers say online appointment scheduling is important.

Personal factors such as a physician’s education, biography, age, and even a physician photo are also important. Not only is it essential that physicians keep their profiles up to date – they also need to humanize their brands with personal information. Survey data showed that patients value how easy it is to actually see a physician or facility. Patients also indicated that extended hours and online scheduling options are important. According to our study with YouGov:

- 62% of respondents believe that appointment availability shown online before making an appointment is either very important or somewhat important.
- 57% say that online appointment scheduling is either very important or somewhat important. This is especially true for 27-34-year-olds: 32% cited online scheduling as very important versus roughly 15% of people aged 55+.

All these considerations suggest it is essential for organizations and physicians to publish and maintain accurate and complete information online

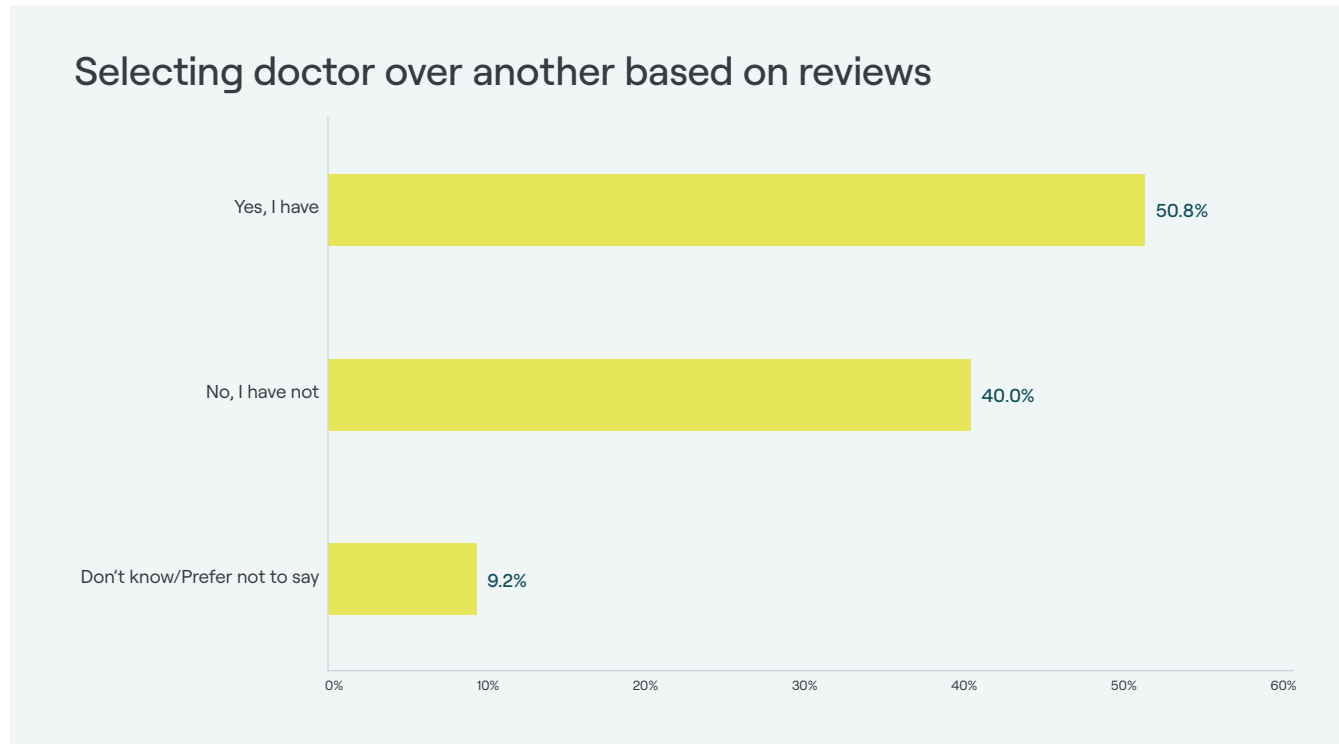
– especially insurance accepted, location data, and ratings/reviews – on the places where patients are looking for care: insurance portals, GMB listings, websites, and healthcare sites.

We noticed significant differences between the Millennials (represented by the 27-34 age group) and Baby Boomers (people aged 55 years and older) in a few other important ways:

- **Millennials are less brand loyal.** Only 28.9% of people aged 27-34 believe a physician’s connection to a certain hospital or brand is important, compared to 52.5% of people aged 55+.
- **Millennials care more about price transparency.** Some 25.3% of people aged 27-34 believe prices posted online are important, compared to 13.1% of people aged 55+.

Healthcare facilities and physicians need to maintain a balancing act: meet the needs of patients today while anticipating how to provide an excellent patient experience to Millennials, [who outnumber Baby Boomers in the United States](#)

3. Ratings/Reviews Are Incredibly Important



Q:

Have you ever selected a doctor over another based on reviews?

50.8%

of survey respondents said they've selected a doctor/facility over another based on reviews.

Patients pay very close attention to ratings/reviews:

- Half (50.8%) of survey respondents said they've selected a doctor/facility over another based on reviews.

In addition, patients are choosy. They want to read a lot of good reviews about doctors to inform their decisions. The problem is 65% of physicians have zero reviews. Healthcare providers are not giving consumers the patient experience information they want. 66.7% of

respondents consider a 4-star rating to be the minimum acceptable standard for choosing a healthcare provider.

- 38.9% read five-to-nine online reviews before selecting a provider – and 9.4% of respondents actually research 20 or more reviews.

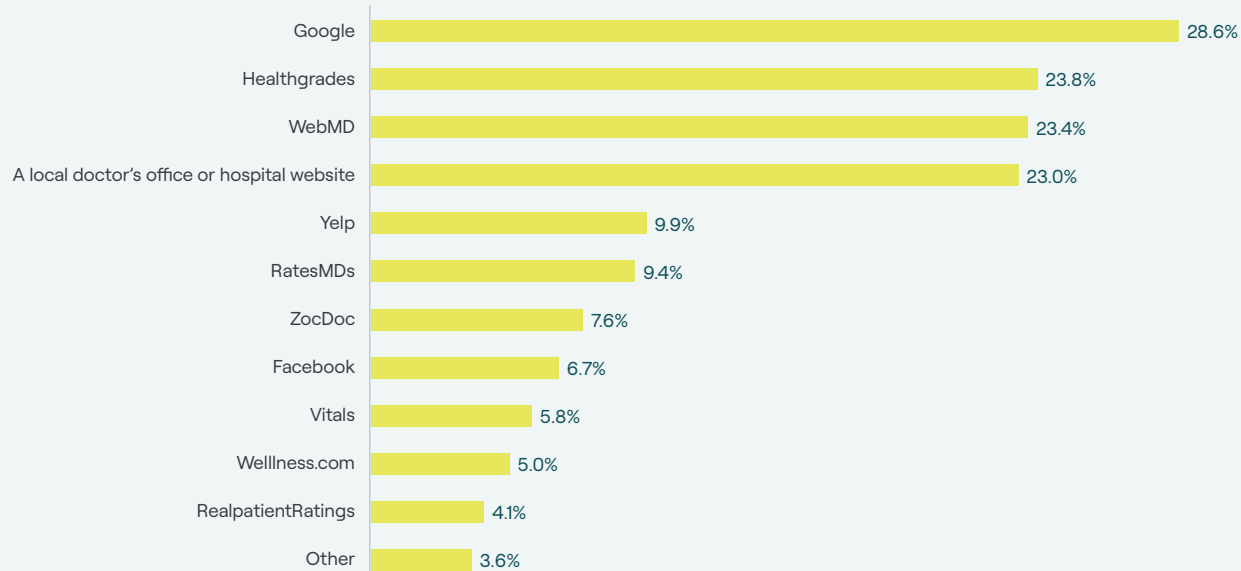
Treat patient ratings/reviews as a precious asset.

Encourage patients to leave reviews. Respond to them.

And use that data to improve the patient experience.

4. “Review Amplifiers” Have a Huge Impact on Ratings/Reviews

Online review sites used to evaluate doctor, hospital or health clinic



Which if any of the following online review sites have you used to evaluate a doctor, hospital or healthcare clinic?

47.6%

of respondents aged 27-34 rely on Google to find ratings/reviews.

When patients seek ratings/reviews, they narrow their search to a small number of sites:

- Google
- Healthgrades
- WebMD
- Physician or hospital website

Of those consumers who have used review sites, the most popular are Google, Healthgrades and WebMD. We call these sites review amplifiers because they wield an inordinately strong influence on your reputation.

Google in particular is especially important for Millennials: 47.6% of respondents aged 27-34 rely on Google to find ratings/reviews. Only 21.5% of consumers aged 55+ rely on Google. Millennials are about six times more likely to rely on Facebook reviews of healthcare providers compared to Baby Boomers.

Review sites used to evaluate healthcare providers

Review Site	18-34	35-54	55+	All
Not applicable - I have not used any online review sites	22.9	36.2	37.0	34.3
Google	47.6	28.6	21.5	28.8
Healthgrades	19.9	25.5	23.6	23.8
WebMD	19.9	23.1	25.1	23.4
A local doctor's office or hospital website	20.5	22.6	24.3	23.0
Yelp	13.3	11.7	6.7	9.9
RateMDs	13.9	8.1	8.8	9.4
ZocDoc	19.3	6.2	4.3	7.6
Facebook	16.3	6.7	2.9	6.7
Vitals	6.6	6.0	5.3	5.8
Wellness.com	7.2	5.5	3.6	5.0
RealPatientRatings	7.2	3.6	3.3	4.1
Other	1.8	3.3	4.5	3.6



Which if any of the following review sites have you used to evaluate a doctor, hospital, or healthcare clinic?

+28.8%

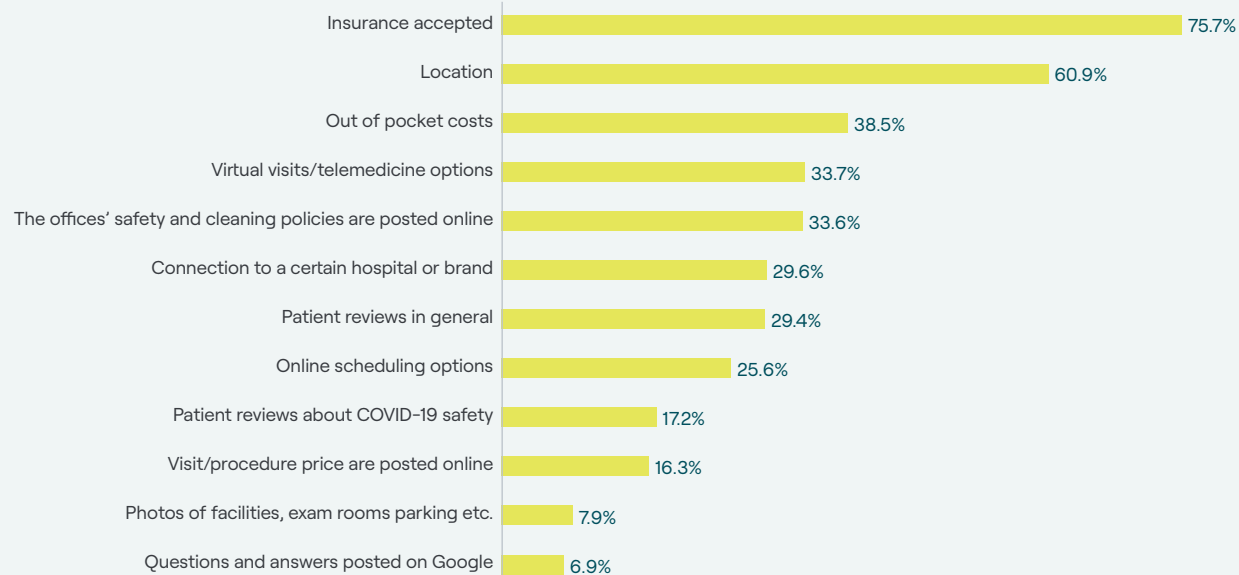
of consumers use Google reviews to evaluate a doctor, hospital or healthcare clinic.

Of those consumers who have used review sites, the most popular are: Google, Healthgrades and WebMD.

At a time when the number of ratings/review sources has multiplied, we recommend that healthcare providers prioritize the most important sites, particularly if resources are stretched. Providers should ensure that they focus ratings/reviews efforts on the review amplifiers.

5. Covid-19 Influences Consumers' Priorities in Some Big Ways

Information important when choosing a doctor or healthcare location



Since the Coronavirus (COVID-19) outbreak, (i.e. since early March 2020), which if any of the following are important to you when choosing a doctor or healthcare location?

33.7%

of consumers consider virtual visits/telemedicine options to be important when choosing a physician or healthcare location.

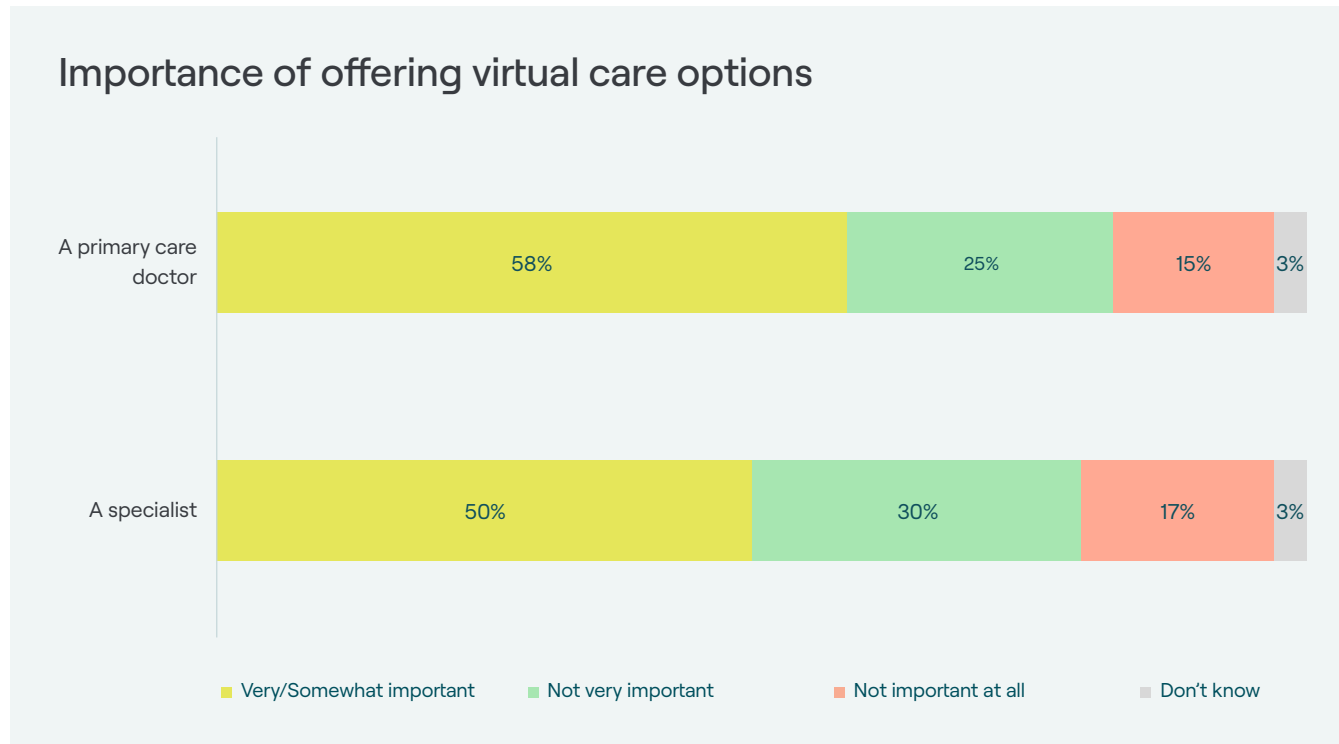
We asked people to identify which sources of information have influenced their choice of a provider or location. The five most important factors were:

- Insurance accepted
- Location
- Out-of-pocket costs
- Virtual visit/telemedicine options
- Safety/cleaning policies posted online

These responses tell us that:

- People are especially concerned about the costs of care. Being transparent about costs and insurance accepted is more important than ever.
- The risk of going into a location looms large. It's important to make virtual visit options available and show patients how providers keep their locations safe.
- Provide telehealth options. Not only is telehealth a Top Five consideration, but 40.3% have used telehealth since the pandemic hit.

6. Virtual Care Is A Growing Factor in Consumer Choice



Q:

When you are looking for each of the following healthcare professions how important, if at all, is it that they offer virtual care options?

58%

of consumers say virtual care options are important when choosing a primary care doctor.

We dug a little deeper into the importance of virtual care as a driver for consumers to select one provider over another. We found that:

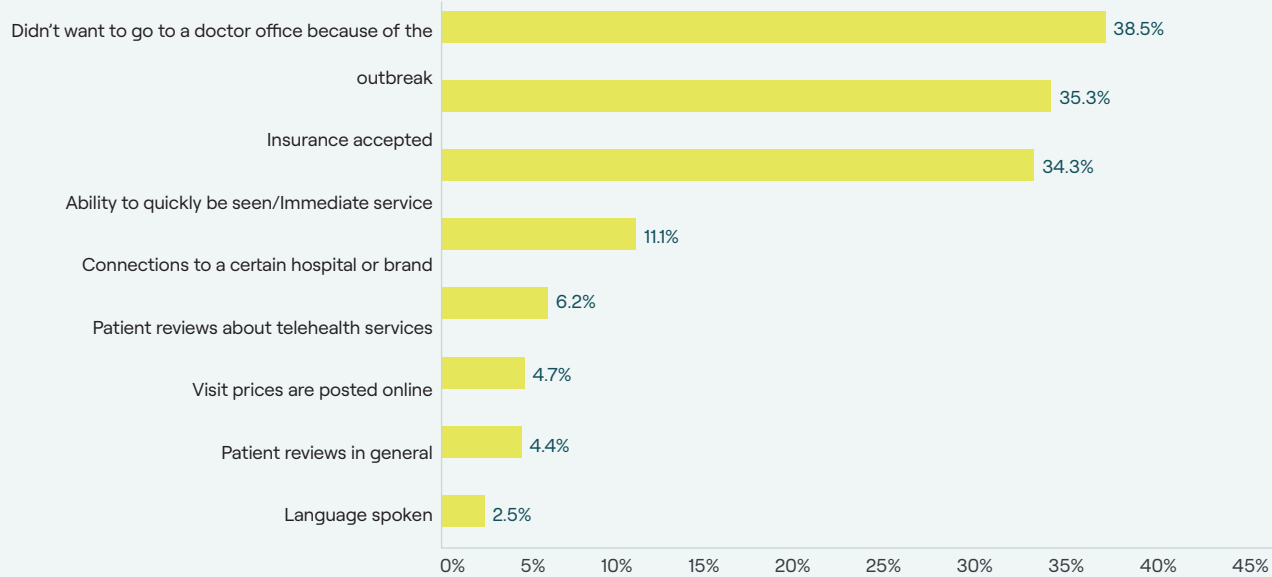
- 58% say that virtual care is either very important or somewhat important that their primary care doctor offers virtual care options. And half say the same about the importance of a specialist offering virtual care. Healthcare providers need to make it easy for people to find virtual care and book virtual appointments.

What factors influence a person's decision to use virtual care?

The top answers:

- It's the only option physicians are providing right now
- Didn't want to go to the doctor's office because of the outbreak
- Insurance accepted
- Ability to be quickly seen (convenience is especially important to 27-34 year olds)

Importance of offering virtual care options



Which if any impacted your decision to use telehealth to visit a doctor?

38.5%

of consumers say they didn't want to visit a doctor's office because of the pandemic

This data tells us:

- Patients will respond if a provider showcases its virtual care option.
- Organizations and physicians should emphasize the immediacy and safety of virtual care.

For more insight, please read our recently published blog posts [“Why Virtual Care Might Be Here to Stay”](#) and [“Virtual Care and the Patient Experience Strategy.”](#)

Reputation's Proprietary Data Reveals the Covid-19 Effect

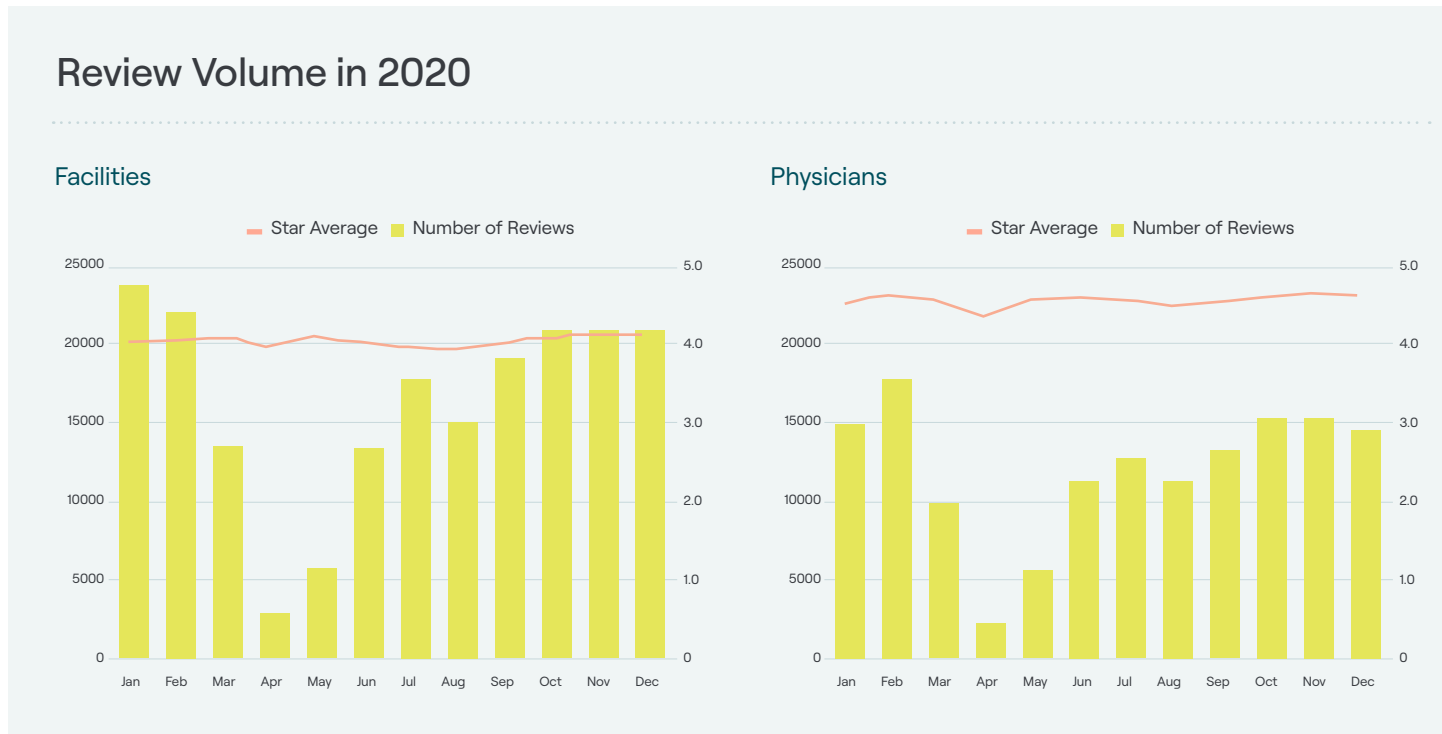


We know the pandemic has affected the search for care. But how has it influenced what patients say about acute care providers in their ratings and reviews?

To find out, the Reputation Data Science team examined 348,000 patient ratings/reviews across providers' websites and social channels. We used our own proprietary data analysis methodology that uses natural language processing to detect patterns in patient comments.

Here's what we found:

Review Volumes Are Steady



+4.9%

Healthcare facilities increased their Reputation Scores by 4.9% in 2020, and physicians improved theirs by 3.5%.

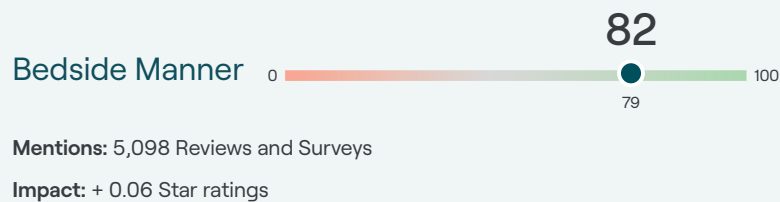
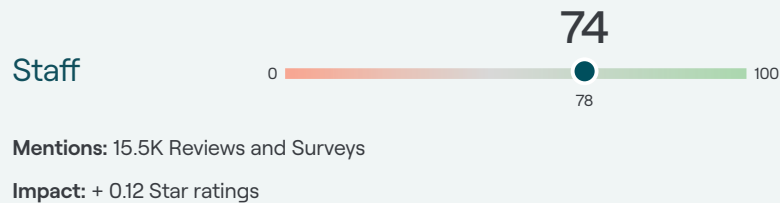
Both facilities and physicians saw a big drop in review volume from March to May (likely due to Google suspending reviews for weeks). But review volume is back: the review volume for both physicians and facilities is only 9% behind pre-Covid-19 levels.

The steady review volume helps explain why Reputation Scores for both physicians and facilities remained consistent as a whole in 2020. In fact, Reputation Scores show a minor increase: overall, healthcare facilities increased their Reputation Scores by 4.9% in 2020, and physicians improved theirs by 3.5%.

With patients providing feedback in higher numbers again, it's all the more important for facilities and physicians to monitor reviews, respond to them, and request them from patients to improve care.

Staff, Bedside Manner, and Cleanliness Are the Biggest Drivers of Positive Sentiment

Strengths in the last 6 months



Positive Sentiment

Staff, bedside manner, and cleanliness are the main drivers for a positive star average. This data shows the importance of the people who care for patients and their families, and the effect they have on the experience, especially as patients experience the stress and uncertainty of the pandemic.

Here is a glimpse at positive feedback:

Staff

- Office staff, nurses and doctors were fantastic.
- I was in and out within a hour, front desk staff was very nice and [Healthcare Providers] were excellent with me and my daughter.
- The ER team was incredible and by 10 a.m. I was headed to surgery performed by the amazing [Physician] with [Physician Group].

Bedside Manner

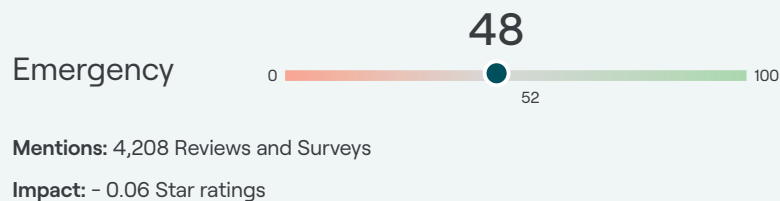
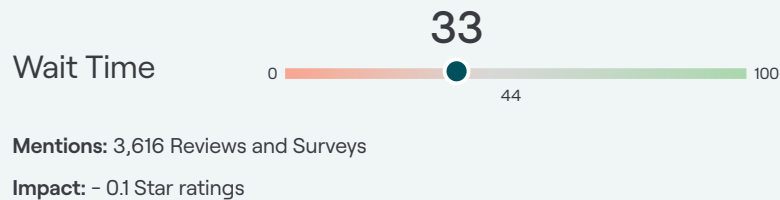
- I was in and out quickly and had all my questions answered. The nurses and staff were friendly and competent.
- [Provider] was very attentive and helped to calm my daughter down and get through the paperwork quickly.
- Every single nurse at shift change was professional, caring and attentive to my every need.

Cleanliness

- Their bedside manners was superb and their infection control cleanliness was soooooo good I felt so safe and comfortable.
- The facility is very clean and well maintained and [Provider] does a great job in listening and working with her patients to address their needs.
- The staff is super friendly and very attentive and the food was excellent, the room clean and relaxing.

Wait Times and Emergency Room Care Are the Two Biggest Drivers of Negative Sentiment

Weaknesses in the last 6 months



Patient complaints

Wait times and emergency room care are driving down the star averages. The data tells us that healthcare organizations should be focused on improving processes to reduce wait times as much as possible.

Negative feedback includes:

Wait Time

- Everyone here is very rude and unprofessional and withholds information and doesn't care about anyone that's waiting.
- They had me waiting for over 1 hour without giving me any medicine for pain.
- All people waiting for 3, 4, 5 hours for their test.

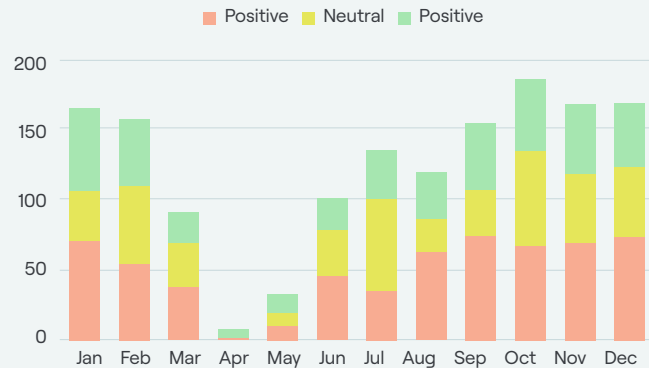
Emergency Room Care

- The ER doctor stood by the door and did not examine me at all. She said, "well you can go home and take a Benadryl and if the symptoms worsen, then call 911 for them to rush you to the ER." I expressed to her that I was not leaving the ER in this condition.
- The ER nurses are so unhappy that they sit there in the Nurses station gossiping about the patients that come and go. (HIPAA Violations) They moved a few of us 3 different times when they had multiple rooms available they decided to sardine us in rooms.

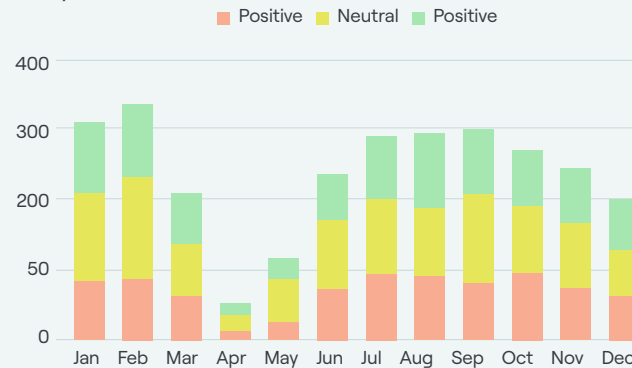
Getting an Appointment Is a Concern

Getting an Appointment

Facilities



Physicians



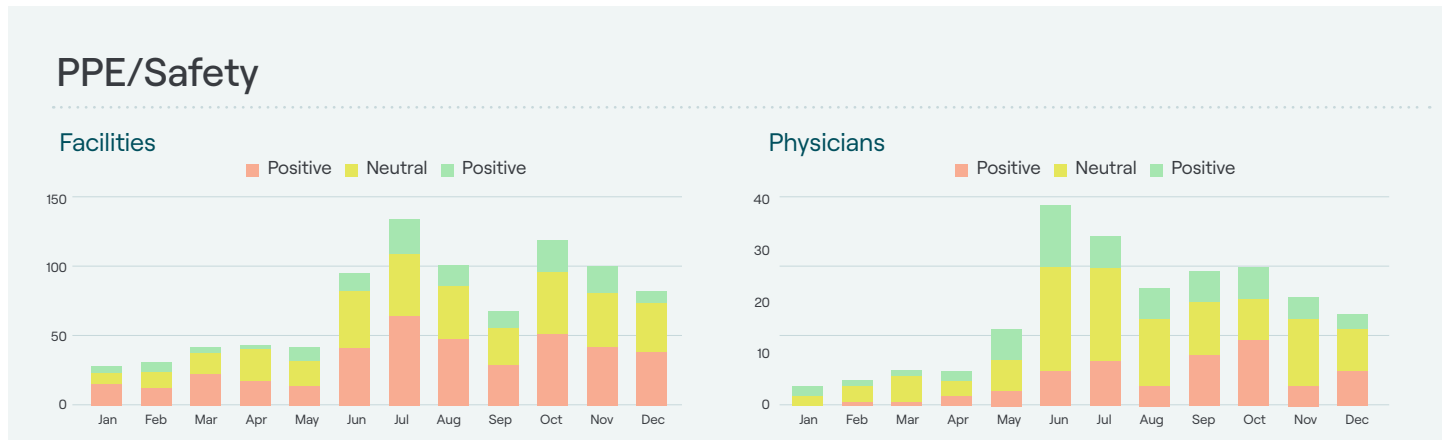
Sentiment regarding appointments is down for both physicians and facilities.

Throughout 2020, we saw a drop in mentions regarding “getting an appointment,” but by December people were talking about getting an appointment as much as they had pre-pandemic. But mentions of getting an appointment for physicians have not returned to pre-Covid-19 levels, suggesting that virtual care is overtaking, not happening alongside, in-person visits. However, for both facilities and physicians, sentiment was down 7 percentage points for facilities, and 5 percentage points for physicians.

Here is a glimpse at patient negative feedback:

- They do not know how to answer their phones and you cannot leave a voice message. After multiple non answered calls I finally got on the phone with someone and they just immediately hung up on me. Ridiculously unprofessional and unorganized.
- Awful scheduling. They had 2 numbers on file for my 3 year old. They decided the surgery time had to be moved from 6 am to 8 am, but they only called one of the phone numbers, which happened to break this week. So instead of making sure they got a hold of us they just left a message on the broken phone.

PPE/Safety Is a Growing Concern



Sentiment towards wearing masks has improved, but mentions of hospitals remained negative overall.

Throughout the year, wearing a mask was the most commonly mentioned topic within the PPE category. Sentiment about wearing a mask has improved, which suggests that caregivers are getting better about wearing them.

We also saw fewer comments mentioning nurses and PPE, suggesting that they have become better at using protective equipment. Mentions of hospitals, though, remained negative overall.

Positive patient feedback:

- ER Staff and staff was excellent! Felt very safe and cared for. Everyone wore a mask and gave me great care. Thank you.
- Friendly team! I was very impressed that when I mentioned to the nurse checking me in that I was hearing impaired. The practitioner later came in with a clear face mask instead of a regular one. I know that is just a small thing, but it made my visit so much better and the gesture was much appreciated. Thank you!

Negative patient feedback:

- Extremely dangerous. Staff and Admin REFUSE TO wear masks in medical and office space. I went in for an X-ray, the Tech was not wearing a mask at all. I asked to speak to the director of radiology and when he opened his office door he stood a foot away from me with no mask on. For your safety, do not go.



Consumers use information they find online to make important healthcare decisions and we want that information to be meaningful, actionable, and to reflect the positive reputations of our hospitals and medical providers. We're proud of the work we've done with the Reputation platform to gain insights from customer feedback, improve online visibility and help drive access to quality care. It's an honor to be recognized for that work and to be ranked as a leader in online reputation.

— Tomi Galin,
Senior Vice President of Corporate Communications and Marketing,
COMMUNITY HEALTH SYSTEMS



A Digital Reckoning for the Healthcare Industry



The healthcare industry faces a digital reckoning. And it's fast approaching as Millennials exert more influence over the future of the industry.

As we discussed elsewhere in this report, Millennials (born between 1981 and 1996) are now the largest generation in the United States. They are also crucial to the healthcare industry. Younger Millennials, already established in the workforce, are paying for their own care. Older Millennials are also responsible for the care of both their children and their parents. Older Millennials are also entering the prime earning years of their careers, and younger Millennials are beginning to gain earning and spending power that the younger Gen Z generation still lacks.

Unfortunately, the healthcare industry is largely disconnected from how Millennials find healthcare.

Behavior patterns for patients searching for care:

Millennials are twice as likely to use a web search to look for care than Baby Boomers (aged 55+), and are 20 times more likely to use a map app such as Google Maps.

Web search for care

200%

Millennials search for care online at a rate that is 2X higher than Baby Boomers

20X

more likely to use a map app

Google is incredibly influential with Millennials:

47.6% of Millennials rely on Google to find reviews of healthcare providers. Only 28.8% of Baby Boomers rely on Google. In addition, Millennials are about six times more likely to rely on Facebook reviews of healthcare providers compared to Baby Boomers. **Patient ratings/reviews are the single-most important factor influencing Millennials' choice of physicians and facilities** next to insurance accepted and proximity.

Reliance on Google

47.6%

of Millennials rely on Google to find reviews of healthcare providers

28.8%

of Baby Boomers rely on Google

The healthcare digital disconnect

Reputation research shows that facilities and physicians alike are **woefully disconnected from how Millennials search for care online.**

Zero Reviews in 2020


50%

of healthcare facilities have zero reviews in 2020

Zero Reviews in 2020

65%

of physicians have zero reviews in 2020

A photograph of a woman in a white lab coat, likely a healthcare professional, examining a patient's arm. The image is overlaid with a teal and orange color gradient. The woman is looking down at the patient's arm with a focused expression.

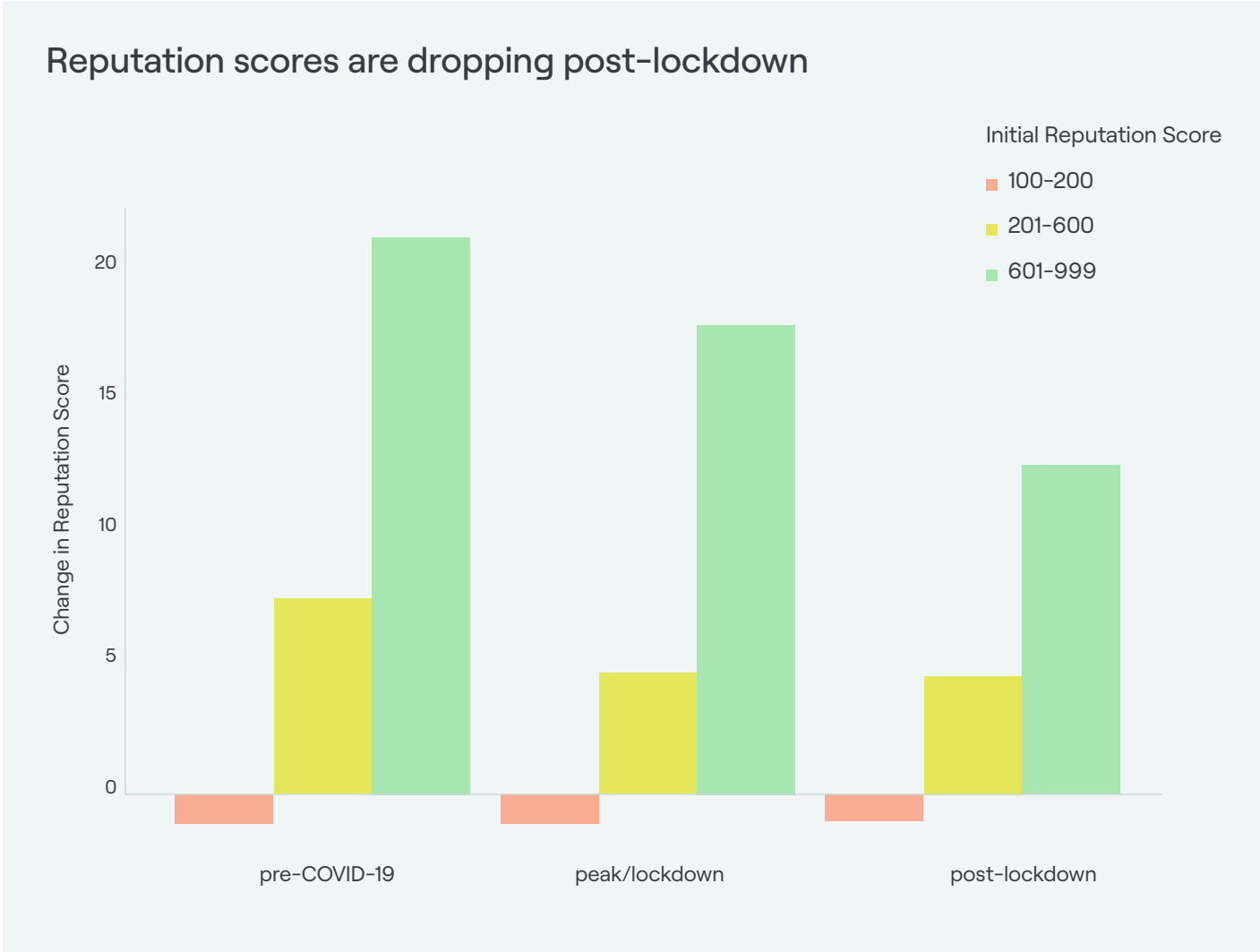
Facilities and physicians need to accumulate reviews.

They need to ask patients for reviews, respond to them, and make long-term improvements that result in more reviews, especially positive ones. Why? Because:

- **Reviews make facilities and physicians more visible online** – where everyone, most importantly Millennials, are looking for them. As Google [states](#), managing and responding to reviews is one of the most important factors that determine a business's visibility on Google.
- **Reviews have a huge impact especially on a provider's GMB listing.** [And GMB listings are the Number One factor influencing any business's visibility on Google.](#)
- **Ratings/reviews influence Reputation Score for a facility and physician.** And a higher Reputation Score means more patients will view and click the GMB listing for a provider to ask for directions to the location, visit its website, or call the provider. In fact, Healthcare facilities with a Reputation Score have 1,290% more conversions (clicks) on their GMB listings than those with lower Reputation Scores. Physicians with higher Reputation Scores have 540% more conversions than physicians with lower scores.

The Impact of your Reputation Score

Unfortunately, we also find that too many physicians and facilities are not managing their Reputation Scores. For example, let's look at physicians' Reputation Scores, which are dropping:



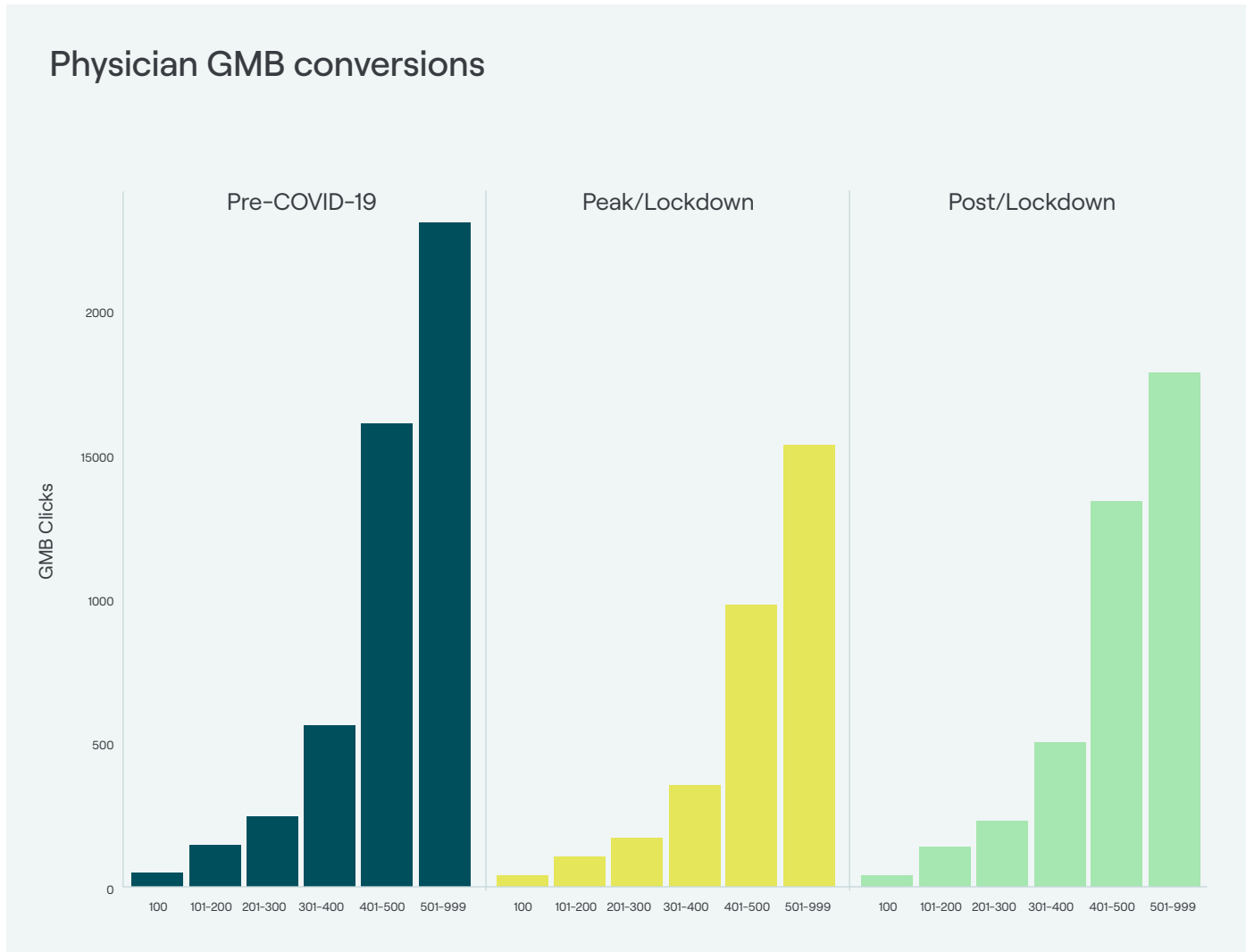
Despite its continued importance, more and more physician Reputation Scores are falling post-lockdown.

Improving Reputation Scores will improve traffic and conversions on healthcare providers' GMB listings.

And we have the research to prove the point. During the pandemic, we analyzed more than 50,000 physicians' GMB listings. We looked especially at conversions, or GMB clicks to call, visit their website, or get directions to their office

We found that:

Physicians with Higher Reputation Scores Get 540% More GMB Conversions



+540%

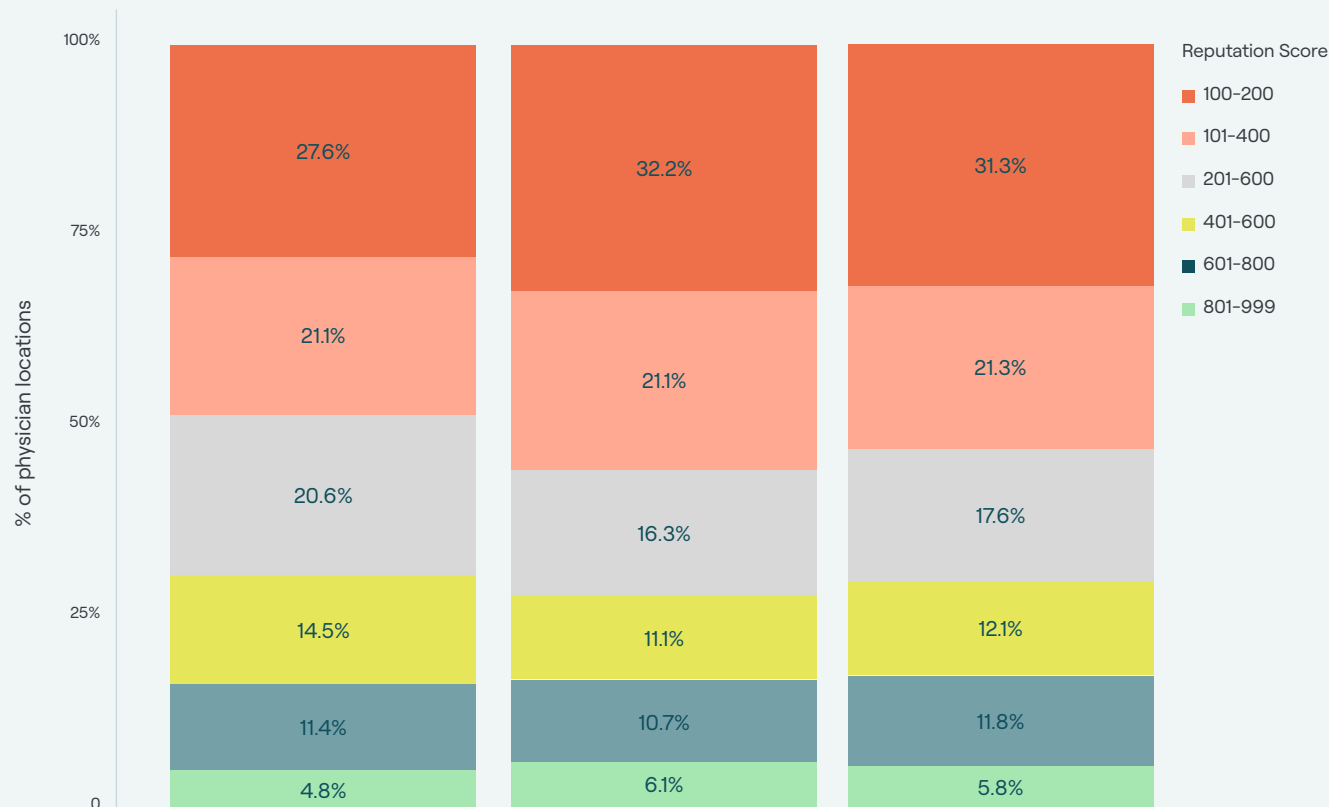
Physicians with Reputation Scores between 601-800 have, on average, 540% more GMB conversions than those with Reputation Scores of 101-200.

Physicians with Higher Reputation Scores Get 43% of All GMB Conversions

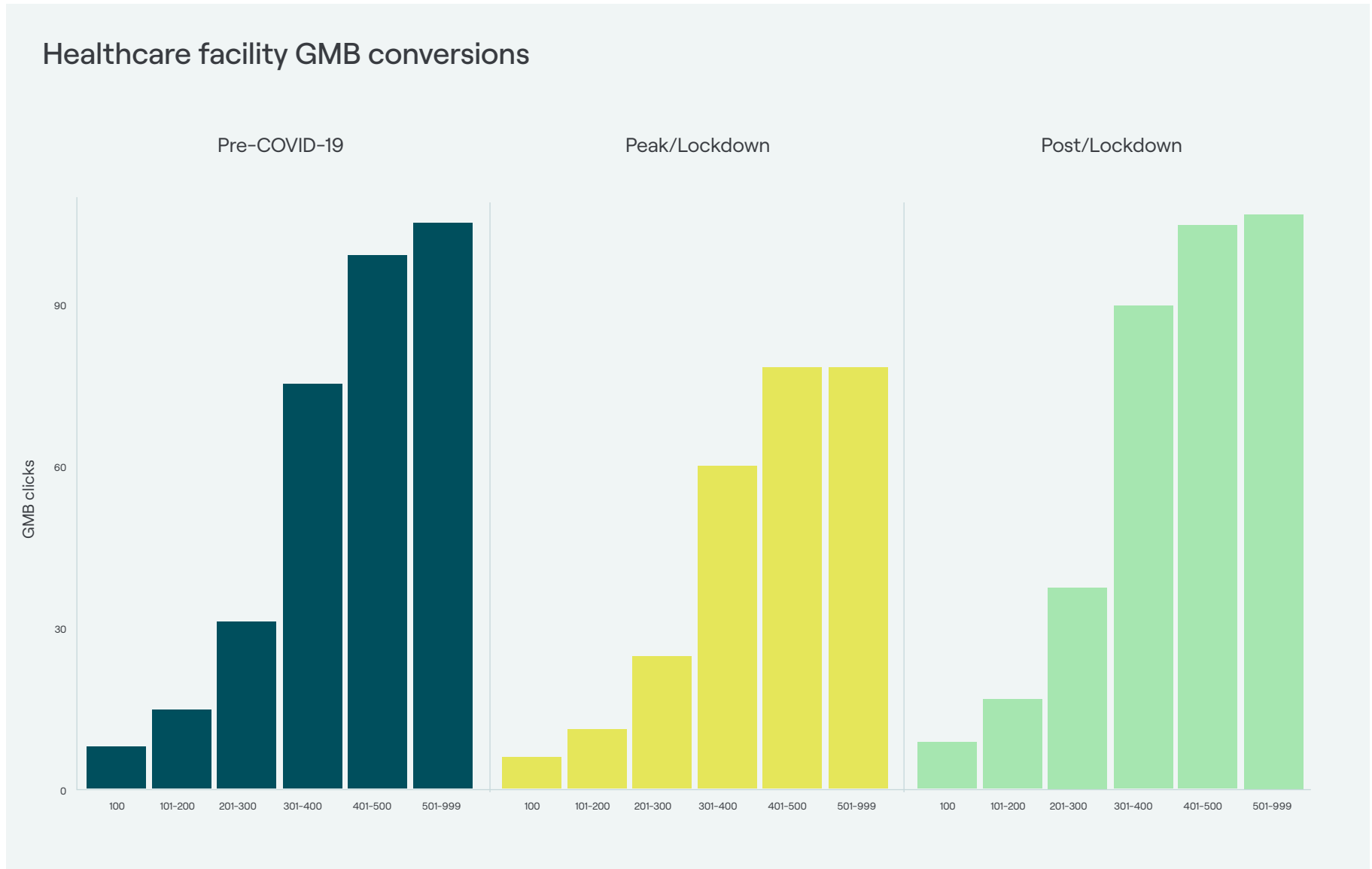
+43%

Reputation Scores of 601+ represent only 17% of physicians but make up 43% of GMB conversions.

Physician percent GMB conversion per Reputation Score

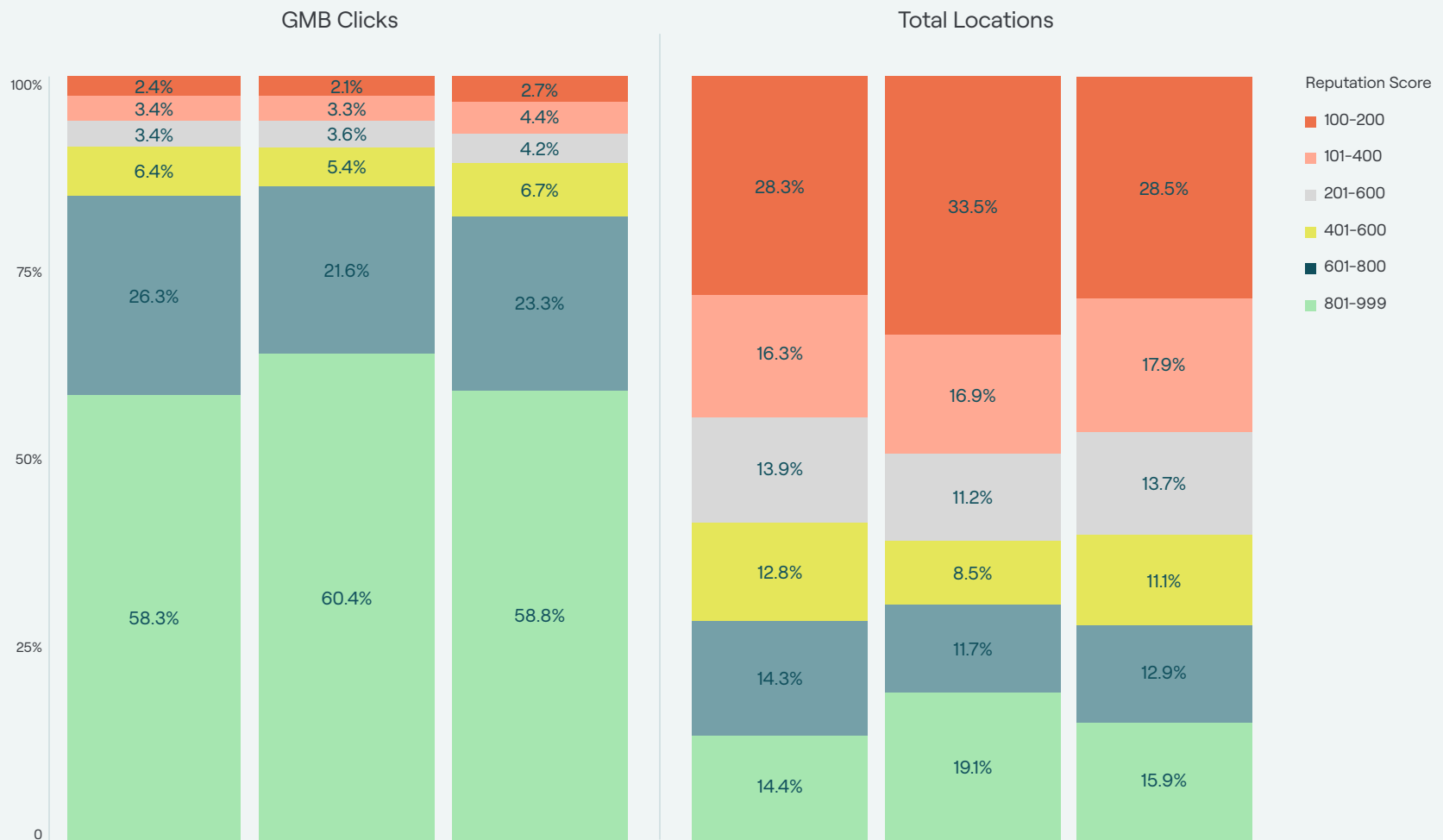


Healthcare Facilities with a 501+ Reputation Score See 1,290% More GMB Conversions



Facilities with Higher Reputation Scores Account for 59% of all GMB Conversions

Healthcare facility percent GMB conversion per Reputation Score



The opportunity is clear, and significant:

Physicians and facilities need to mind their Reputation Scores. One of the best ways to do that is to 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.

Improving Reputation Score has an impact. Stronger Reputation Scores mean more people clicking on GMB listings to call and visit physicians and facilities. Higher online conversions drive an increase in patient volumes.

Facilities and physicians that solve the digital disconnect will also benefit in another big way: they'll position themselves well for Gen Z, which is catching up with Millennials in terms of their overall population size. Gen Z is raised in the digital age. Providers that fail to improve their digital savvy will become irrelevant.

The Top 15 Healthcare Systems



We analyzed the 25 largest health systems and ranked the top 15 by our proprietary Reputation Score.

As noted earlier, for our 2021 ranking, we chose to focus on the acute care facilities for the 25 largest health systems¹, then selected the top 15 for our annual ranking, because acute care facilities have been at the epicenter of the pandemic. They are also at the forefront of a number of important changes transforming healthcare, notably the rise of virtual care.

To arrive at a healthcare system's Reputation Score, we evaluated acute care facilities within each healthcare system² and aggregated their scores.

1. Based on publicly reported revenue.

2. The scope of hospitals we evaluated: childrens; critical access; long-term acute care; rehabilitation; and short-term acute care.

Our ranking of healthcare systems is based on a variety of factors, including the volume and sentiment of consumer reviews.

To research wide-ranging consumer experience, Reputation's Data Science team applied machine learning to unstructured text from consumer reviews on Google, Facebook, and other sources for 113,000 physicians and facilities. Then we ranked healthcare systems using our Reputation Score. Based on a 0 to 1,000 range, Reputation Score measures a location's sentiment, visibility, and engagement across nine elements — from star average to review volume. (See the section Elements of Reputation Score for more detail.)

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. Reputation Score is not the only metric, but it's a valuable one. It's a tool that provides a unique assessment that complements other industry ratings and performance measures. Unlike other report cards, Reputation Score delivers actionable insights that help providers improve operations and satisfy patients.

The Top 15 Healthcare Systems^{1,2}

Rank	System	Reputation Score	Sentiment	Visibility	Engagement
1	Universal Health Services	729	63%	84%	94%
2	HCA Healthcare	714	72%	75%	87%
3	Community Health Systems	663	58%	73%	94%
4	CommonSpirit Health	581	60%	66%	71%
5	AdventHealth	564	43%	69%	87%
6	NewYork-Presbyterian	545	59%	64%	13%
7	Sutter Health	543	48%	63%	69%
8	Tenet Healthcare	539	36%	71%	84%
9	Baylor Scott & White Health	537	45%	61%	84%
10	Northwell Health	528	43%	72%	18%
11	Ascension	520	40%	65%	92%
12	Kaiser Permanente	516	47%	59%	68%
13	Banner Health	514	41%	64%	99%
14	Atrium Health	501	50%	59%	63%
15	Cleveland Clinic	497	42%	72%	3%

1. Based on publicly reported revenue.

2. The scope of hospitals we evaluated: childrens; critical access; long-term acute care; rehabilitation; and short-term acute care.

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At our UHS Acute Care Hospitals and Behavioral Health Facilities, our reputation as the preferred healthcare provider in our served markets is important to us. It is a key aspect of our mission statement - ‘to provide superior quality healthcare services that patients recommend to their family and friends.’ We have an unwavering focus on the consumer - making it easier for them to find us online and select us for their care. It’s an honor to know we are the reputation leader, but even more important than the recognition is our continued ability to use feedback to drive operational changes that improve patients’ lives.

— Celine Patterson,
Lead, Online Reputation Management, **UNIVERSAL HEALTH SERVICES**



What Does it Take To Be a Top Healthcare System Brand?

When we examined leaders' and laggards' Reputation Scores for patterns in performance, we found that:

Leaders (the top performers) outperforms laggards (the bottom performers) in all sections of sentiment, visibility, and engagement.

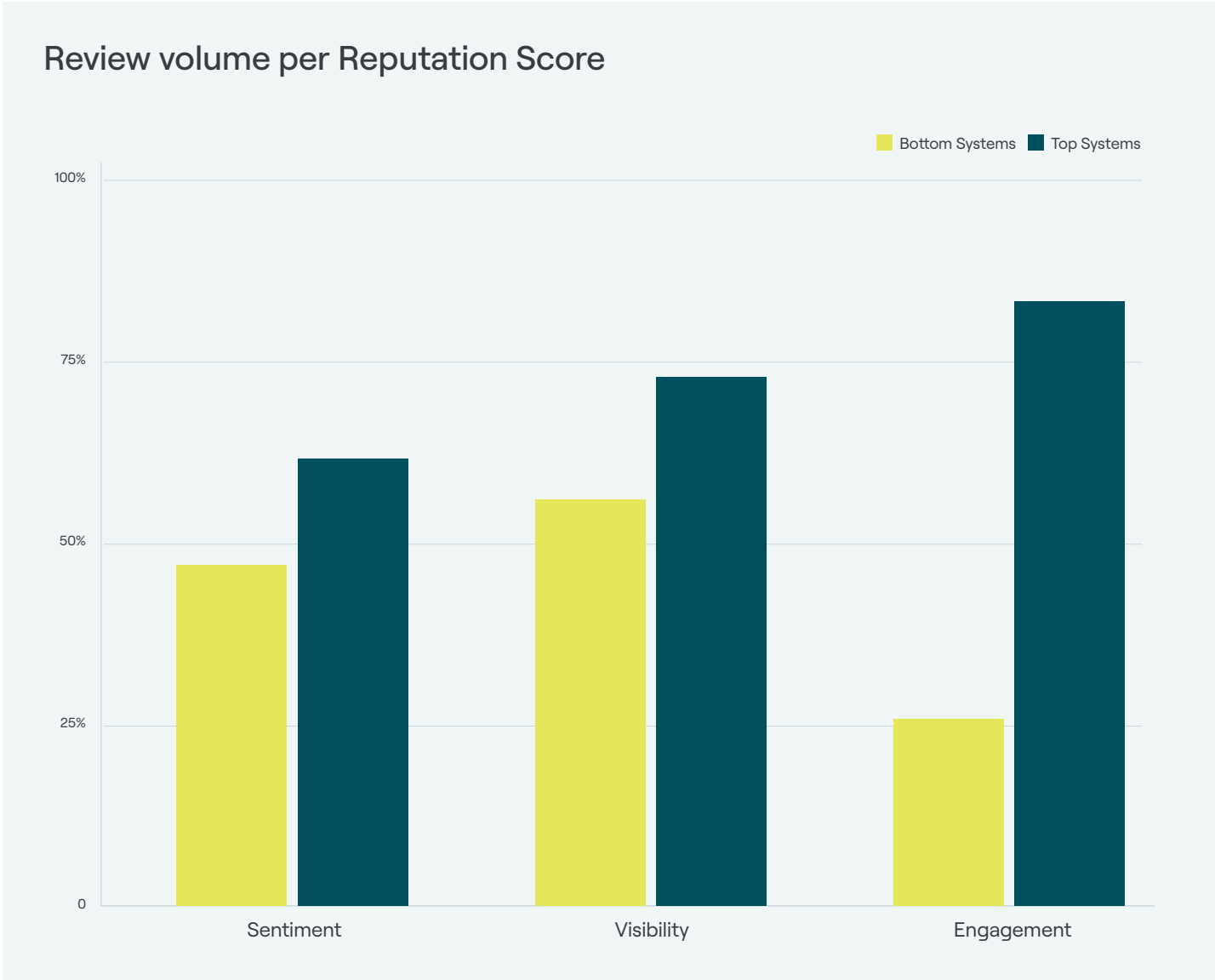
For sentiment, the difference between leaders and laggards is 16 percentage points. Sentiment is especially important because of all the elements of Reputation Score, sentiment has the biggest impact.

The biggest difference between leaders and laggards: engagement. The gap between leaders and laggards is 57% percentage points for engagement. Leaders engage more with their customers and respond to reviews much better than laggards do.

Leaders accumulate an average of 232% more reviews than laggards.

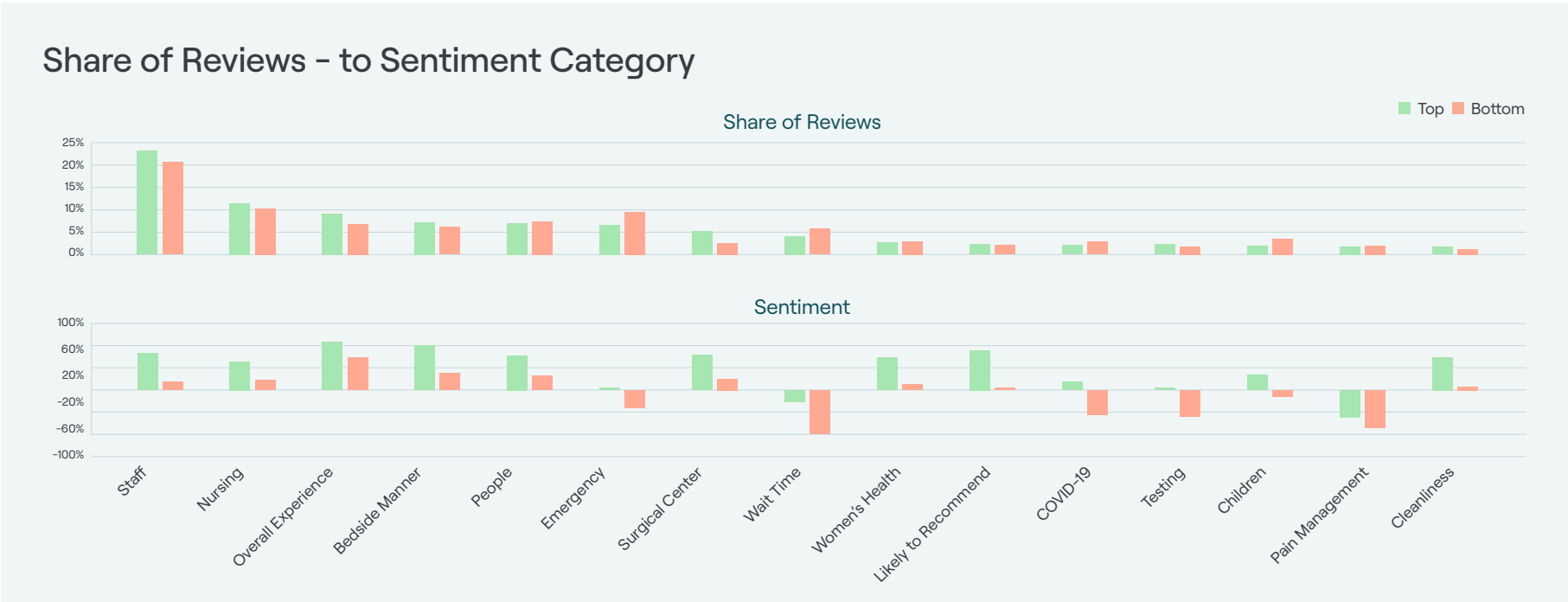
The average number of reviews for leaders was 683; for laggards, that number dropped to only 205.

Leaders Accumulate an Average of 232% More Reviews than Laggards.



The average number of reviews for leader is 683; for laggards, that number drops to only 205.

A Closer Look at Sentiment



- Leaders have a higher share of reviews mentioning staff, nursing, and overall experience. Laggards have a higher share of reviews mentioning emergency care and wait time.
- Leaders have better sentiment in all categories. The categories with the biggest differences between leaders and laggards were likely to mention Covid-19, and wait time.
- For the most commonly cited category – staff – we see a difference of 43 percentage points separating leaders from laggards.
- The biggest opportunity for laggards: improving the interactions with the staff and wait times.

The Impact

Higher Reputation Scores deliver benefits such as more conversions on GMB listings. Healthcare organizations with a 501+ Reputation Score have 1,290% more conversions on their GMB listings than those with a 100-200 Reputation Score.

Healthcare Needs Reputation Experience Management




The pandemic has underscored two fundamental needs for healthcare organizations and physicians:

Manage online reputation closely and proactively to increase conversion rates. As we saw, even during the pandemic, patient review volumes remained steady. Patients continued to give feedback on the quality of their experience – ranging from the length of wait times to the bedside manner of staff – on social media, surveys, GMB listings, and everywhere else people evaluate organizations and physicians. As we noted, there is a direct correlation between Reputation Score and GMB listing conversions.

Sense and respond to patient behavior. The explosion of virtual care in 2020 underscores how the pandemic has accelerated changes in patient needs that were gradually occurring before 2020. Some healthcare organizations and physicians responded faster and more effectively than others by understanding and responding to real-time consumer sentiment.

How does the healthcare industry meet patients where they are today while anticipating emerging needs? We believe the answer is to embrace Reputation Experience Management.



What is Reputation Experience Management?

Reputation Experience Management means gathering and acting on patient feedback to drive decision making and enhance the patient experience — today and tomorrow.

With Reputation Experience Management, a healthcare provider collects feedback in the form of surveys, ratings, reviews, and other sources. It doesn't matter where the feedback comes from — a provider can aggregate it in Reputation's platform and analyze sentiment across multiple focus areas. Each source of data contributes to a more robust understanding of the voice of the customer.

Patients can give feedback in many ways: a chat interaction, a GMB review, a social media post, or a CAHPS survey, to name a few. Each source of feedback is limited. No single channel gives a holistic view. But when a provider collects and studies all sources together, they start to see patterns emerge — patterns that suggest cause-and-effect from one department to the next.

Sometimes a provider detects problems that are isolated, such as complaints about parking created by a temporary inconvenience (such as construction) or an easily fixable problem (exam rooms are too cold). Or a provider might encounter something more systemic and serious, such as deteriorating quality of care that, on investigation, is rooted in physician burnout or lack of training for new personnel — problems that require a deeper look.

Oftentimes, coming up with a solution requires the patient experience officer to look broadly across the entire facility to find the root of a problem — for example, a poor mobile app experience that has nothing to do with the quality of care, but rather a technology glitch to resolve.

Ask for Feedback

One key to making Reputation Experience Management work is a commitment to asking for feedback. Patients who have a negative experience are going to find a way to blast providers online whether or not they are asked. Typically, this comes in the form of a negative review on Google or Facebook.

But most patients aren't going to go out of their way to provide positive feedback unless the provider asks them to do so. Providers need to make it easy by texting or emailing a patient survey, by sharing a link to Google where they can review the provider, and so on. When providers request feedback via surveys and reviews, two things happen:

- Providers can understand a complete picture of the voice of the consumer, with a statistically significant volume of information needed to be a reliable source of insights.
- Providers collect more positive feedback that can be shared to promote your brand.

Consumerism and Digital Transformation

Armed with more complete data, the entire organization can improve.

Patient experience teams are empowered to make improvements. HR can identify a morale problem that can be remedied with better employee communications. The revenue cycle leaders can identify and resolve issues causing billing complaints. Reputation Experience Management is all about getting that deep insight into the many layers that comprise a patient experience – beyond the interaction they have with a physician.

Connect the Dots

It's not enough to ask for input. Providers must synthesize it from multiple channels and learn from it. When providers bring multiple feedback channels into one dashboard, they start to view each touchpoint not as a single interaction, but as part of their brand – the total experience they provide.

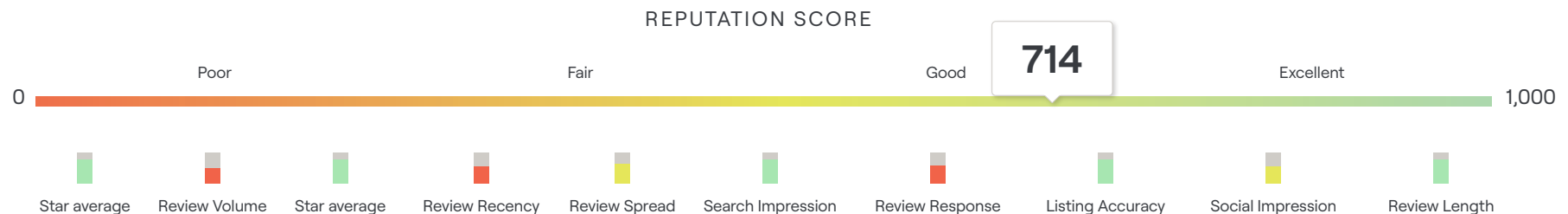
Many healthcare providers are getting much better at collecting feedback. But they also need to:

- Collect feedback in a scalable way that gives them a full picture of their brand across all touchpoints.
- Do so in an organized, consistent manner.

That's the difference between having a bunch of disconnected inputs and actually managing your brand experience systematically. Collecting data does not matter if a provider fails to gain insights as a result.

Elements of Reputation Score

- **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.
- **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.
- **Listing accuracy.** Locations with accurate online information – such as the correct address, phone number, and hours of operation – enable potential customers to find them easily.
- **Social engagement.** This measures how well a business engages on social media. Social engagement looks at metrics such as posts, reactions to posts, fans, and responsiveness. It is more than reviews/ratings – it's an impression of a business' social proof overall.



About Reputation Reports

This report is part of Reputation's series of Reputation Reports, analyzing key data and rankings in the most significant industries that matter most to consumers. Founded in 2013, Reputation is a SaaS-based platform that manages tens of millions of reviews and interactions across hundreds of thousands of customer touchpoints. The patented algorithms behind the Reputation Score are based on more than a decade of machine learning and data science expertise, providing businesses with a reliable index of brand performance that they can use to make targeted improvements.

About Reputation

Reputation, creator of the Reputation Experience Management category, is changing the way companies gather and act on customer feedback to drive decision making and enhance Customer Experience (CX) programs. Thousands of global organizations rely on Reputation to ensure their Business Listings are getting clicks, to request and respond to customer feedback with Reviews and Messaging, to understand their CX strengths and weaknesses with Experience Insights, and to track and execute improvements with Actions — all from within the Reputation Experience Management platform.

Backed by Bessemer Ventures, Kleiner Perkins, Ascension Ventures and Heritage Group, and trusted by over 250 integration partners, including Google, Facebook, Salesforce, J.D. Power, Amazon, and Web.com, Reputation turns feedback into the fuel to grow businesses around the world. Visit reputation.com to learn more.

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