PEP Health

The Missing Metric: Bringing Patient Trust Into Focus With AI-Powered Insights

PEP Health

EXECUTIVE SUMMARY

Trust is the bedrock of the patient-provider relationship, impacting everything from patient choices to outcomes, satisfaction, and loyalty. **Yet until now, healthcare has lacked a standardized and effective way to measure it.**

PEP Health has transformed millions of unsolicited online patient reviews into **healthcare's first standardized AI-powered trust metric: the Trust Score**.

The Trust Score builds upon PEP Health's proprietary PEP Score—recently featured in Becker's Hospital Review— which **predicts HCAHPS outcomes 9 months in advance** and uncovers critical insights that surveys miss (read the Becker's article). Like the PEP Score, this metric can be embedded within value-based agreements, transforming patient trust from an abstract concept into a strategic, measurable asset that directly impacts financial and clinical outcomes.

PEP Health's patient experience insights are validated against national benchmarks

"It's time to listen to patients themselves. When trust breaks down, patients don't show up, don't open up, and don't follow through. Now, for the first time, we can measure trust and take meaningful action to rebuild it."
– *Dr. Mark Lomax, CEO of PEP Health*

including HCAHPS and insurer quality metrics (read more) and highlighted in peer-reviewed research published in *The BMJ* and *The Lancet* (read more).

Together, these metrics enable more effective, data-driven improvement initiatives through continuous, automated listening to what over 35 million patients (and growing) are saying—unprompted and in their own words.

THE CURRENT STATE OF PATIENT TRUST ACROSS THE USA

Healthcare faces a national trust crisis. Public trust in physicians and hospitals has plummeted from 71.5% in 2020 to just 40.1% in 2024, according to recent research from professors at Johns Hopkins University's Carey Business School[1]. This decline is fueled by factors including information overload, increased social and political polarization, poor health literacy, and the rapid spread of medical misinformation—sometimes from medical professionals themselves. Health plans and systems remain ill-equipped to identify and respond to these challenges, with many relying on outdated legacy measures plagued by:

Low response rates: Survey fatigue and digital adoption has driven patients online, where they share feedback freely and unconstrained

Critical blind spots: Missing voices from underrepresented populations and those unable to access care

Costly processes and delays: Require substantial time and resource investment, delivering delayed, periodic insights long after the care episode

Top-down framing: Impose institutional definitions and assumptions of trust rather than capturing how patients naturally express it

Meanwhile, other industries like automotive, finance, and consumer goods have built validated systems for capturing consumer trust. Organizations such as JD Power provide independent rankings based on real-world consumer feedback, while widely used tools like Net Promoter Score (NPS) measure trust, satisfaction, and advocacy across industries. These independent, real-time trust measures have become essential for building customer loyalty, protecting market share, and guiding service improvements. Healthcare, by comparison, has lagged behind.

Our nationwide analysis reveals a varied landscape with distinct "trust belts" (greens) and "trust deserts" (reds) emerging across America, with some regions building significantly higher patient trust than others.

For health systems and plans, the Trust Score provides granular insights down to the individual provider and service-line level, while offering benchmarking across markets. This dual capability—from national benchmarking to actionable local insights—enables healthcare leaders to identify what works in high-trust regions and apply those lessons to areas where rebuilding patient confidence is critical. Multiple factors drive these patterns, and focused analysis reveals specific root causes for each market, facility, and community.

Curious About How Your Organization Stacks Up?

Request Your Personalized Analysis
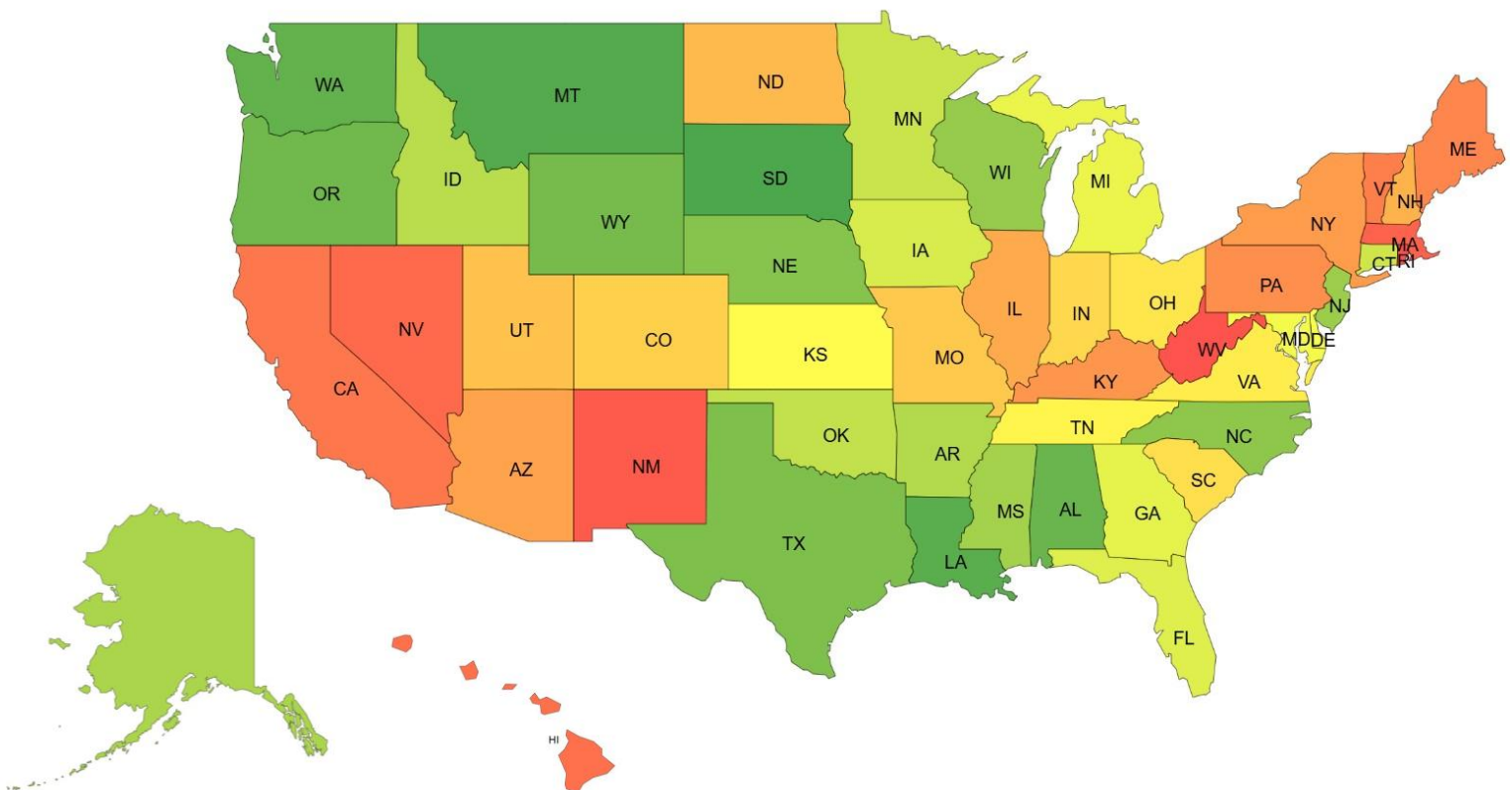
Heatmap demonstrating highest-ranked states (deepest greens) to lowest-ranked states (deepest reds) for patient trust

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WHY TRUST MATTERS IN HEALTHCARE

"In healthcare, trust isn't abstract. It directly impacts outcomes, adherence, and loyalty. For the first time, hospitals, payers, and providers can measure trust in real time, pinpoint when and where it erodes, and take immediate steps to rebuild it."

– Dr. Mark Lomax, CEO of PEP Health

Trust is the confidence that patients have in the healthcare system to deliver quality care, act in their best interests, and treat them with respect and dignity.

Research confirms that patients' level of trust in their healthcare provider influences everything from initial care-seeking behavior to long-term health outcomes[1–5] and that it is just as powerful a driver on whether they seek medical care as socioeconomic factors like income or education.[1] This confirms that trust breakdowns can be just as prohibitive as physical or financial barriers.

Trust doesn't emerge from clinical competence alone; it's built through consistent, respectful, caring, and collaborative interactions over time. When providers take time to build and nurture it, their patients:

✓ Seek care when needed

✓ Engage with preventative care

✓ Share information openly

✓ Follow treatment plans

✓ Experience fewer emergency visits and readmissions

✓ Experience faster recovery times

✓ Achieve better health outcomes

The bottom line is that without trust, patients don't **show up, open up, or follow up.**

THE STRATEGIC CASE FOR MEASURING TRUST

The balance of power in healthcare is changing and the metrics that matter most now go beyond cost and clinical quality to include how patients feel about their care. The Trust Score transforms patient experience into a powerful strategic asset—helping forward-thinking leaders meet and exceed clinical, financial, and experiential goals.

Payers are no longer passive intermediaries—as Becker's Hospital Review notes, they're actively steering patient behavior through digital front doors, transparency tools, and network design. Provider brand equity alone no longer guarantees patient loyalty. As patients become savvier consumers and increasingly view themselves as equal partners in the provider-patient relationship, trust becomes a strategic asset that payers and providers must quantify to navigate and execute value-based contracts effectively and in real time. In today's market, trust drives experience and experience drives revenue—making an effective tool for

measuring it an essential business need. The Trust Score equips organizations to meet this shift head on:

✓ **Payers** drive members to trusted, high-value care

✓ **Providers** differentiate based on lived patient experience

✓ **Both** align around a transparent, patient-centered measure that drives engagement, outcomes, and retention

"Community trust is what drives engagement, loyalty, and ultimately better health outcomes for patients. Ultimately, this impacts bottom line revenue for health systems especially in competitive markets."
– Adam Glasofer, MD, Founder of Vertex Health

For healthcare leaders focused on value-based care, the Trust Score offers a powerful new lever for improving patient acquisition and loyalty, gaining a competitive edge in the market, and ultimately fulfilling the Triple Aim of healthcare: **lowering costs while enhancing healthcare outcomes and experience.**

See It In Action

[Schedule a Demo](#)
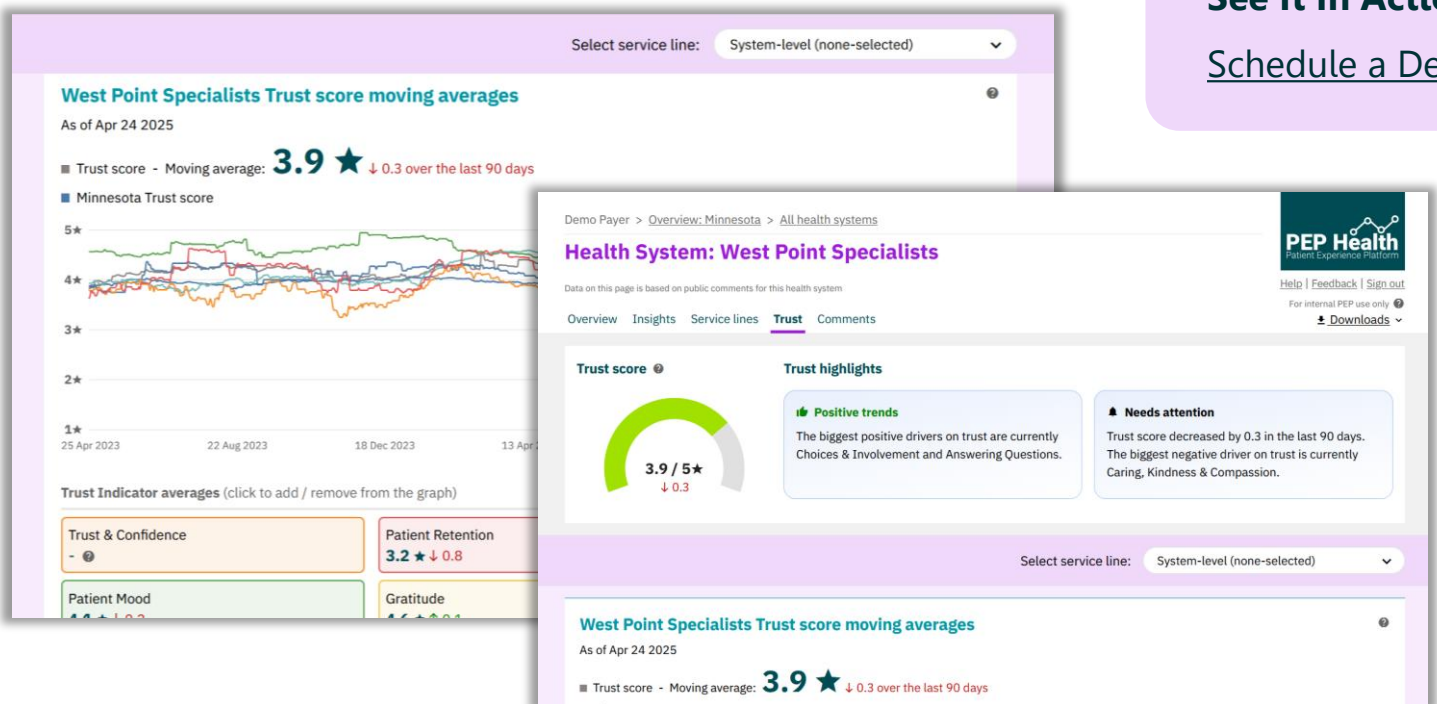
"*Trust Scores have the potential to unlock some of healthcare's most enduring curiosities—why patients do or do not fill their prescriptions, why they do or do not adhere to their care plans, and why they choose or do not choose to seek care when needed and who they seek care from.*"

– *Dr. Julie Kennedy Oehlert, Chief Experience & Brand Officer at ECU Health*

THE CLINICAL AND FINANCIAL COST OF MISTRUST

The clinical and financial implications of mistrust trickle down throughout healthcare organizations, with small drops in trust leading to system-wide consequences. A case study with a major Midwest payer revealed that **for every 1-point drop on a 5-point patient satisfaction scale, health systems lose an estimated $12.4 million in revenue, with trust representing a significant factor in that loss.**

Scratching the Surface on What Mistrust Means for Payers and Providers

Increased patient churn and associated revenue losses, including loss of premium revenue when members switch to competitors

Higher administrative costs associated with patient acquisition, marketing and advertising to attract new patients, investment in patient retention programs and reputational repair, and processing disenrollments and new enrollments

Reduced care plan adherence, preventable hospital readmissions, and higher avoidable emergency department utilization, leading to worse health outcomes, higher costs from disease progression and complications, increased hospitalizations and specialty care, negative impact on quality ratings and metrics, lower reimbursement rates, ED crowding and reduced capacity for true emergencies, increased liability risk and higher overall claims expenses

THE TRUST SCORE METHODOLOGY

The Trust Score is built on two components that **confirm both the presence of trust and the reasons behind it: trust indicators** (i.e. the outcomes of trust, such as an expression of gratitude, a recommendation to others, or a promise to return for future care) and **trust drivers** (i.e. the factors that influence trust, like whether a patient felt respected, listened to, or was treated compassionately).

PEP Health's Trust Score methodology is inspired by Francis Frei's Trust Triangle framework, which contends that trust requires genuine authenticity, competence (logic), and emotional connection (empathy)—and that it fails if any single component is broken.[6]

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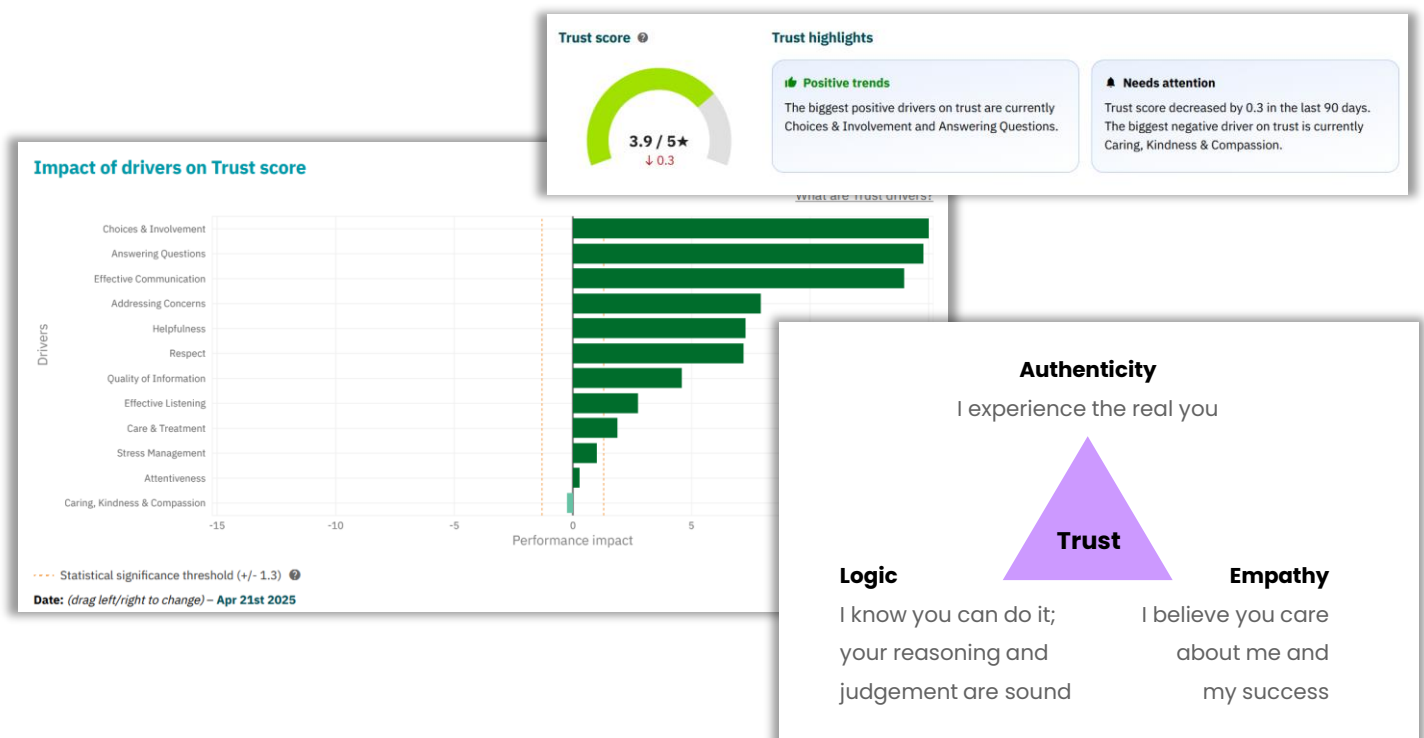
KEY TAKEAWAYS

The traditional approach to measuring patient trust in healthcare has been narrow and misses the opportunity to hear from patients—in their own words—what drives trust.

Health systems lose an average $12.4 million in revenue for every 1-point drop on a 5-point patient satisfaction scale—with trust representing a significant factor in that loss.

Organizations can now identify trust breakdowns in real-time and implement targeted solutions, allowing for immediate intervention rather than waiting for survey results.

The Trust Score transforms patient feedback into a strategic, measurable asset that identifies specific strategic priority areas related to trust, including:

- ✓ When and where trust breakdowns occur in real time
- ✓ What builds or erodes trust within communities and with patients and families
- ✓ Data-driven insights for replicable, trust-building best practices
- ✓ Measures to nurture, and improve trust across health networks, systems, individual facilities, and service lines

"The Trust Score is less about adding another metric and more about achieving deeper understanding of patient healthcare relationships, which underpin many strategic health outcomes."
– Dr. Julie Kennedy Oehlert, Chief Experience & Brand Officer at ECU Health
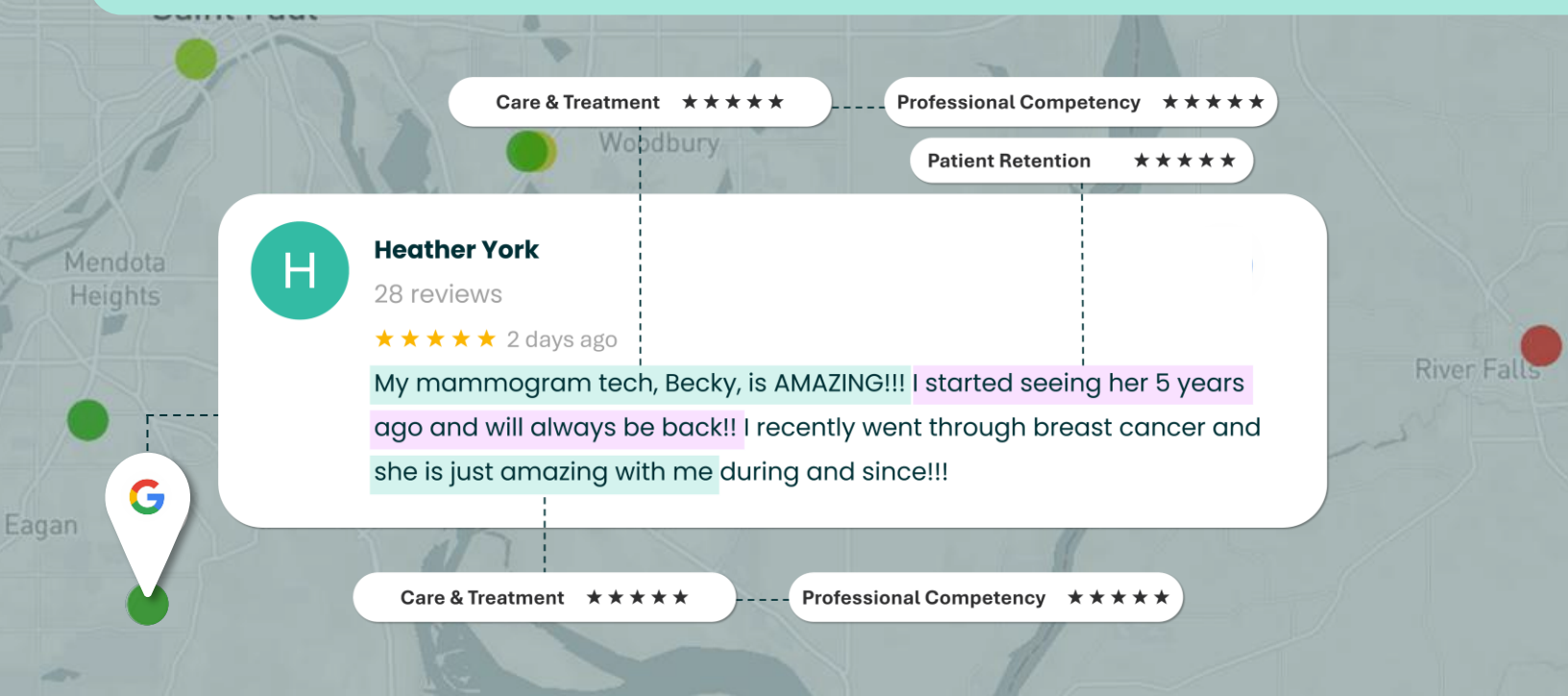
THE BOTTOM LINE: THE ERA OF MEASURABLE TRUST

Healthcare organizations shape patient trust with every interaction but lack effective ways to measure or improve it. PEP Health's Trust Score—the first standardized AI-powered trust metric in healthcare—confirms exactly when, where, and why trust breaks down in real time. Organizations using PEP Health's Trust Score gain strategic, predictive insights into:

- Which facilities or service lines excel at building trust and why
- Where to focus improvements and resources for greatest impact
- Like-for-like benchmarking and rankings against peers and competitors
- Equity gaps and disparities in patient experience
- Emerging threats, changes, and opportunities months before they appear through legacy measures

Join the Trailblazers Leading the Next Era of Transparency, Accountability, and Empathy
Apply for Early Access to the Trust Score Pilot

Care & Treatment ★★★★★   Professional Competency ★★★★★

Patient Retention ★★★★★

Heather York
28 reviews

★★★★★ 2 days ago

My mammogram tech, Becky, is AMAZING!!! I started seeing her 5 years ago and will always be back!! I recently went through breast cancer and she is just amazing with me during and since!!!

Care & Treatment ★★★★★   Professional Competency ★★★★★

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Want To Know What Your Patients and Members *Actually* Think?
Contact Us or **Request a Demo**