



Navigating critical intersections in pursuit of excellence

Insights for healthcare professionals from the 2024–25
KPMG US Customer Experience Excellence Report



Building social capital

The goal of customer experience excellence in healthcare is to deliver patient-centered, personalized, high-quality care across the care continuum, in ways that are compassionate, convenient, cost-effective, and sustainable. It's much easier said than done. Excellence depends upon the interplay of many points of contact—connections between patients and healthcare professionals, between providers and their employees, between providers and their customers, and between payors and their customers/members.

It depends upon the ability to meet expectations in ways that are constantly evolving as new technologies emerge. And it depends upon meeting the needs of a variety of patient and provider profiles, in a mix of geographies, and a range of care settings that may contain radical differences. A multifaceted approach is required.

While perhaps a virtue in its own right, customer experience excellence also produces measurable advantages for companies, increasing customer satisfaction and loyalty, and accelerating growth. Ultimately, customer experience excellence builds and maintains social capital, “bankable” value founded on trust and mutual benefit. In virtually every business sector, the importance of delivering excellence in experience is critical to long-term success.

Getting to excellence in healthcare, however, is far from a direct route. It involves navigating a series of interconnected points in a complex ecosystem—critical intersections along the way. The path to excellence involves understanding the unique needs of every patient, matching provider capacity with patient demand, and integrating diverse and complex technology platforms and operational practices to deliver intuitive interactions and personalized care across the board.

The annual *KPMG US Customer Experience Excellence Report*¹ monitors customer experience and expectations, how these change from year to year, and what market leaders are doing to get it right. This companion report, *Navigating critical intersections in pursuit of excellence: Insights for healthcare professionals*, looks specifically at the US-based healthcare organizations included in the larger KPMG study.

We augment its findings with data and analysis from three reports from Press Ganey, a leading healthcare performance improvement solutions company: *Industry Insights: Patient experience in 2024*,² which studies data from 6.5 million patient encounters across the US to better understand the state of patient experience today and the opportunities for improvement in the years ahead; *Industry Insights: Customer Experience in Healthcare*,³ which examines how artificial intelligence (AI) tools, transparency, and trust impact consumer choice; and *Industry Insights: Health Plan Member Experience in 2024*,⁴ which links patient and member data to highlight key drivers of satisfaction and loyalty.

The key takeaway from these studies is that one size does not fit all in improving patient experience. Data segmentation can peel back the layers of that experience, letting organizations more deeply understand different consumer cohorts and develop targeted strategies to better meet patient needs and expectations.



Improving customer experience

Every year since 2010, KPMG has fielded a survey asking consumers about their individual experiences with brands. In 2024, more than 10,000 US customers were interviewed and asked to rate their experiences with 316 US brands, across a variety of sectors, including healthcare. The *2024–25 KPMG US Customer Experience Excellence Report* explores how top performers are using empathy and generative artificial intelligence (GenAI) to create more value, noting that, in a world where interactions are predominantly mediated digitally, customers are looking for emotional bonds and concrete indications that the companies they interact with genuinely value them as individuals. The report includes data on how well healthcare performed, which healthcare organizations made it into the Top 100 brands, and where the healthcare sector might seek improvements.

[Read the report.](#)

1. KPMG LLP *2024–25 US Customer Experience Excellence Report*.
2. Press Ganey, *Industry Insights: Patient Experience in 2024*.
3. Press Ganey, *Industry Insights: Consumer Experience in Healthcare, 2025*.
4. Press Ganey, *Industry Insights: Health Plan Member Experience in 2024*.

Healthcare: Slippage in rankings

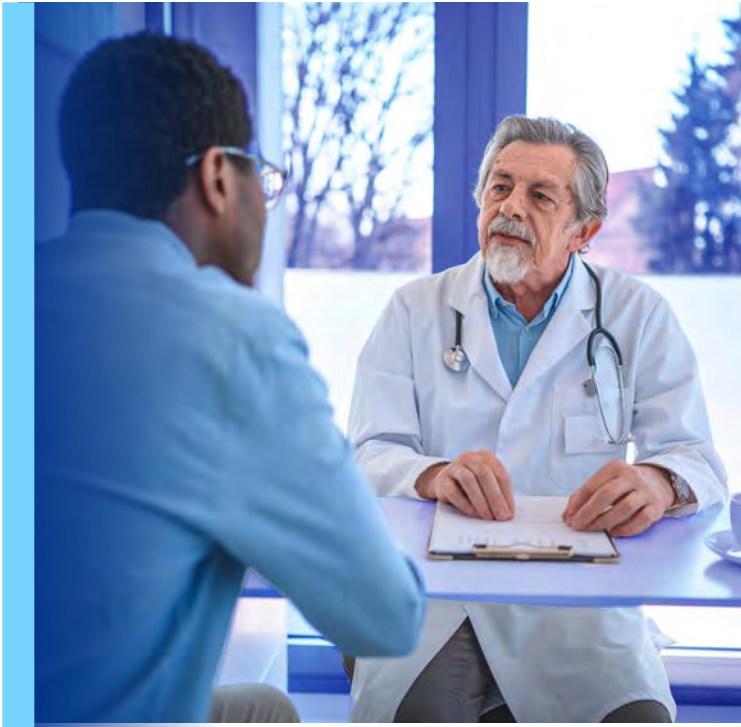
The healthcare sector lost some ground in the 2024–25 study, showing dips in ranked positions and Net Promoter Score (NPS), which asks respondents to rate the likelihood that they would recommend a company, product, or service to a friend or colleague.

Our survey ranks individual organizations using a Customer Experience Excellence (CEE) score—a value from 0 to 10, with 10 being excellent—with the total score for each organization as a weighted average across all survey questions. Scores are recorded for their customers’ perception of each organization’s reputation in three main areas:

Advocacy	How likely they were to recommend the brand to a friend or colleague
Loyalty	How likely they were to continue using the brand in the future
Six Pillars	Ratings for each pillar of the customer experience: empathy, personalization, time and effort, expectations, resolution, and integrity.

The KPMG Six Pillars of customer engagement

The Six Pillars are fundamental components of every great customer experience identified and validated through more than 1.7 million evaluations across multiple markets over 10+ years.



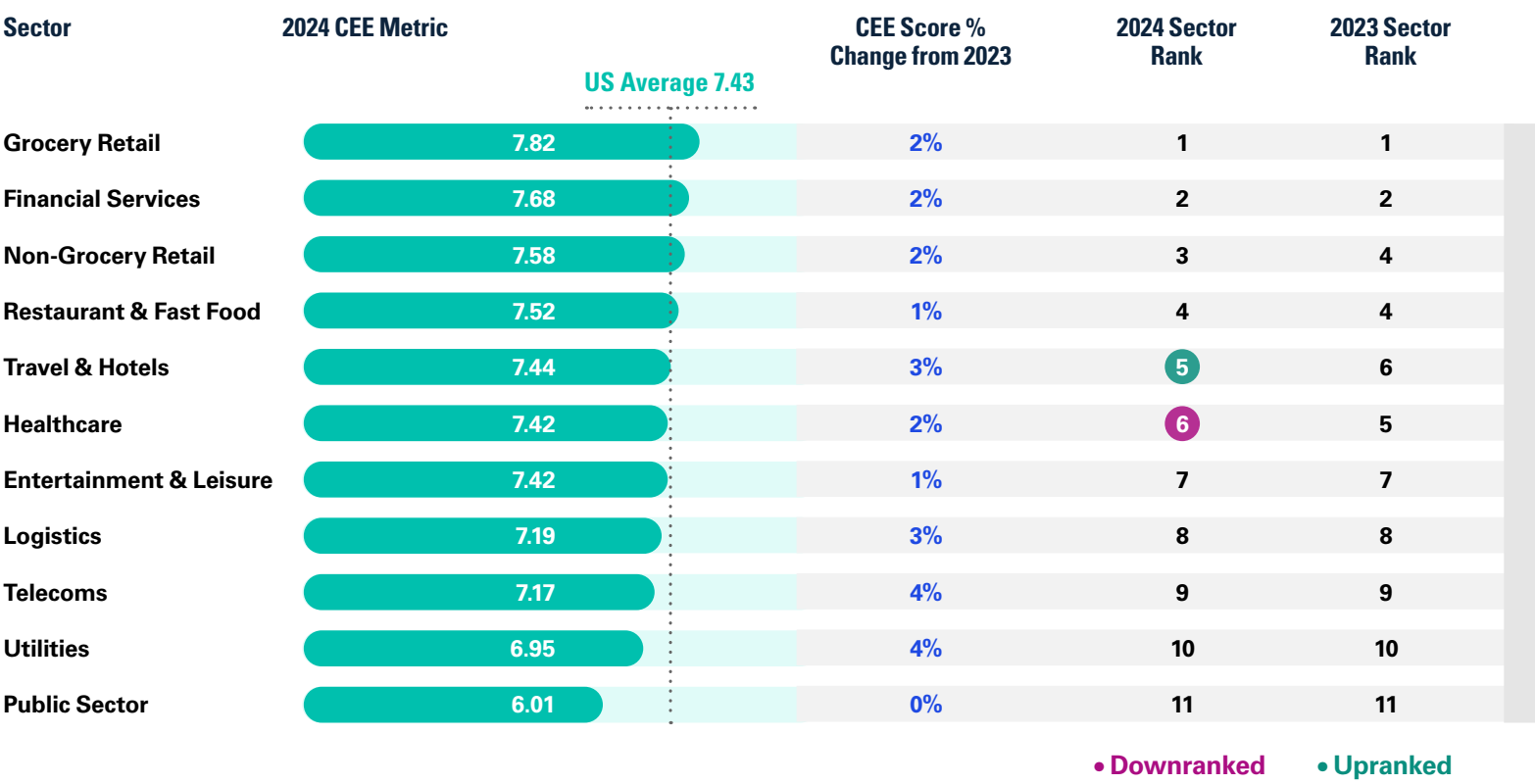
Source: KPMG LLP 2024-25 *US Customer Experience Excellence Report*.

Basics Differentiators

Results of the *2024–25 KPMG US Customer Experience Excellence Report* show that while sector-wide top brand averages improved an average of 2 percent year over year, the positions of surveyed healthcare brands slipped. In the 2023 study, five of them—Mayo Clinic, Humana, United Healthcare, Kaiser Permanente, and Medicare—ranked within the top 100 organizations across all sectors. In 2024–25, only three brands retained their spots in the top 100. Mayo Clinic led, although moved down seven positions from the prior year to 20th place. Kaiser Permanente and Humana ranked 84th and 97th, respectively. While the healthcare sector at large increased by 1.2 percent in average CEE performance, it moved down one place to sixth in overall sector rankings.

2024-25 US average CEE performance by sector

U.S. Sector Performance



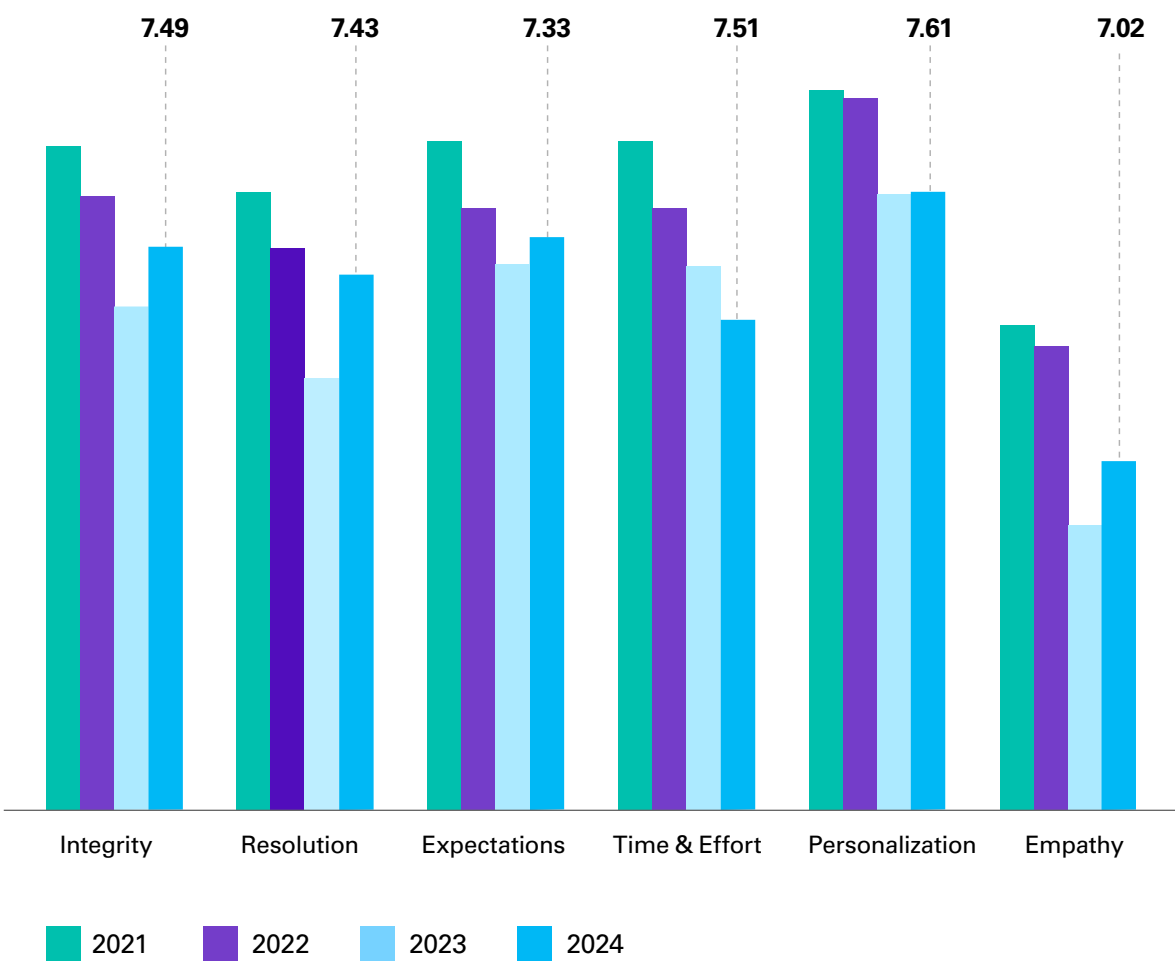
Source: KPMG LLP 2024-25 US Customer Experience Excellence Report.

Ratings across all six pillars have declined over time in healthcare. In the 2024–25 study, the highest-ranking pillars were personalization (7.61 percent), time and effort (7.51 percent), and integrity (7.49 percent). Perhaps ironically, empathy was ranked lowest (7.02 percent), as it has been consistently in the past. In the healthcare sector, with its emphasis on patient-centered care, one might expect it to be the coin of the realm.

Six Pillar average performance in healthcare

Healthcare Average – Six Pillar Performance (0-10) Over Time

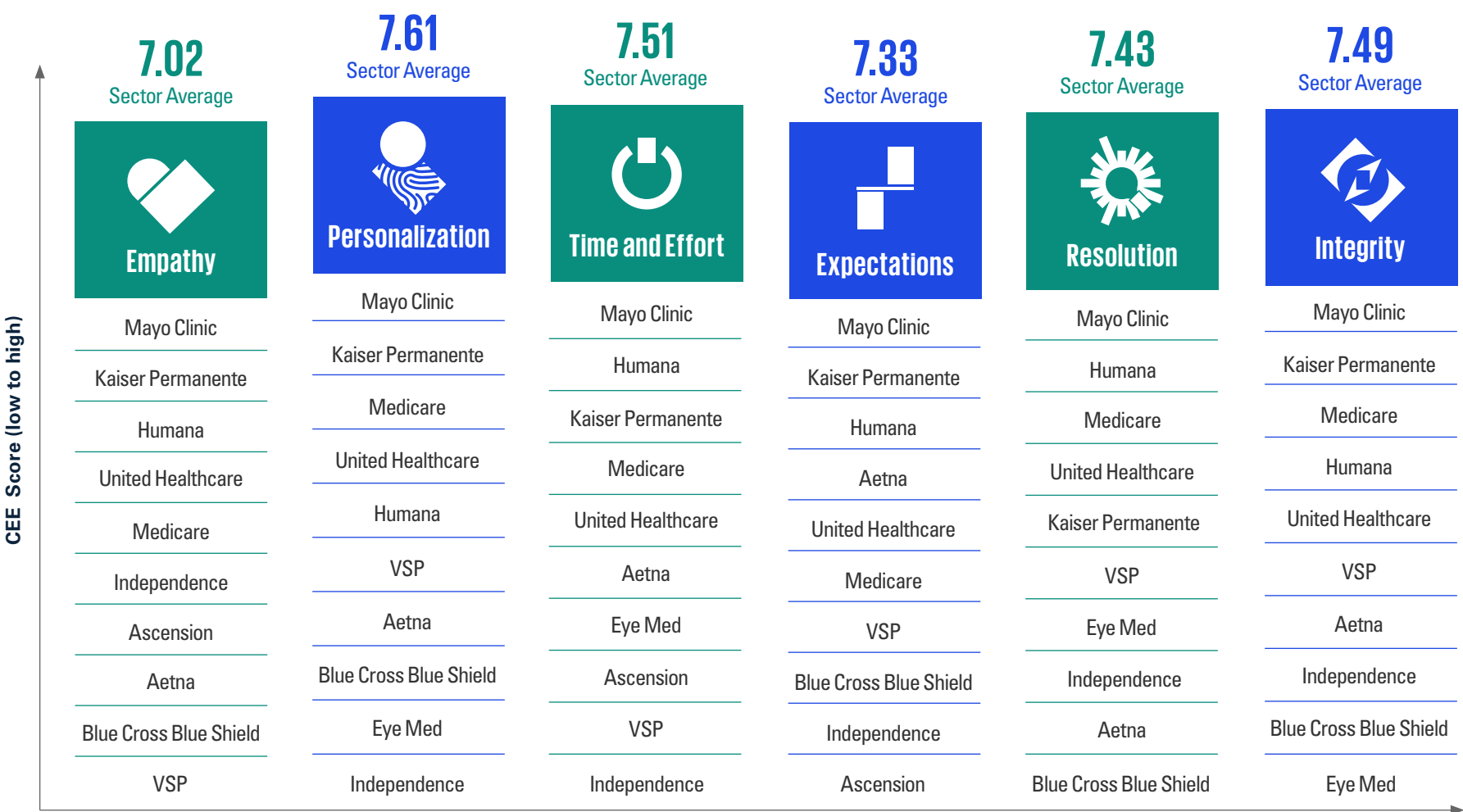
- Personalization has remained the top performing pillar for this sector over the last 4 years.
- Despite being the top 2 pillars (Personalization is 1st and Time & Effort is 2nd), they had the lowest % increase at 0.02% (Personalization) and 0.79% (Time & Effort).
- Resolution had the largest YoY % increase at 3.14% and despite still declining relative to 2020, they had the lowest % decline at -2.4%.



Source: KPMG LLP 2024-25 US Customer Experience Excellence Report.

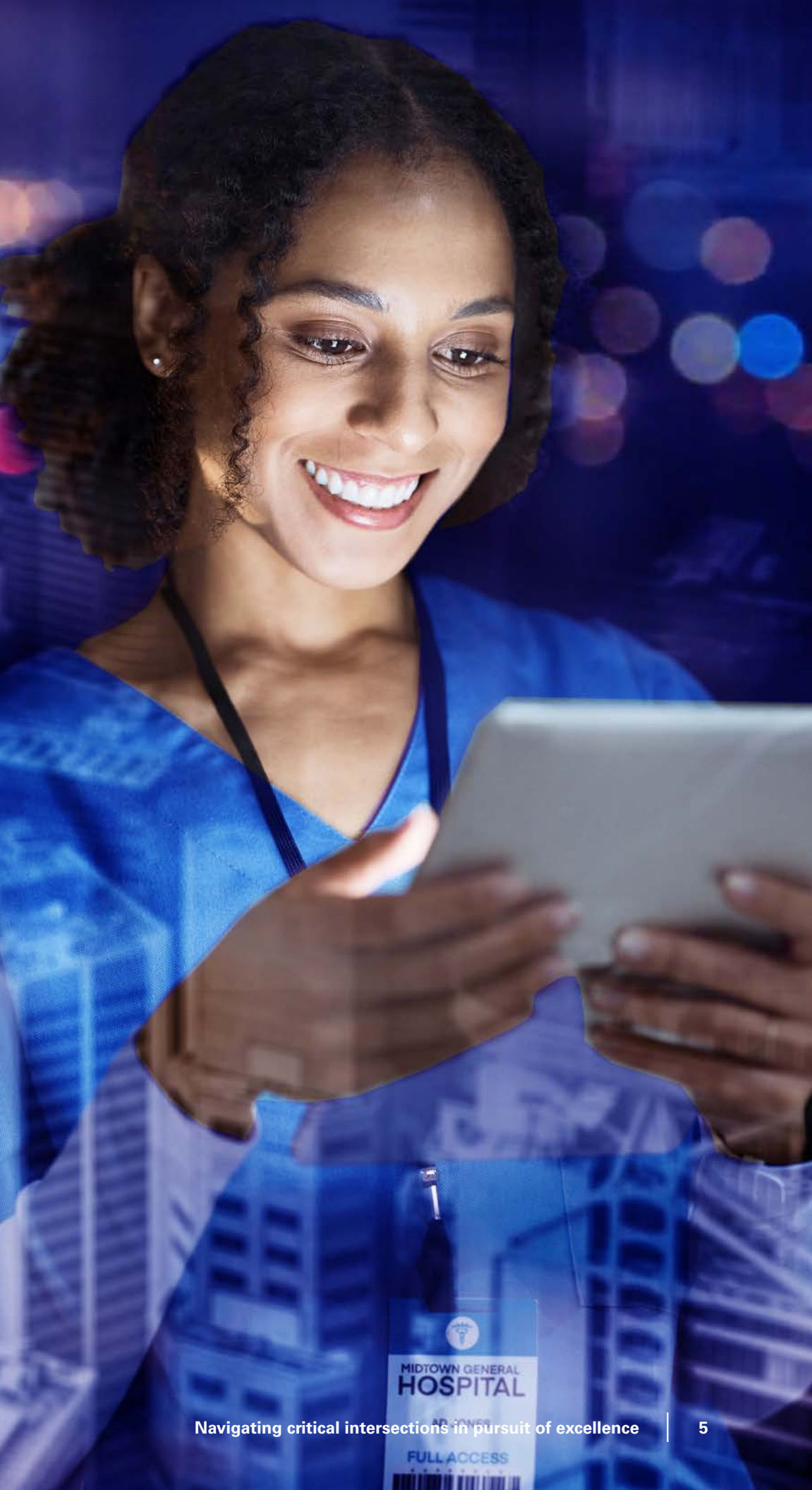
It is notable that there is a high prevalence of insurers versus full-service providers in the top 10 healthcare brands. With the exception of Mayo Clinic, which holds the top spot in every pillar, and Kaiser Permanente, placing second in four of the six pillars, payors are outperforming providers in customer experience excellence.

Pillar performance by healthcare organization



Pillar averages are representative of all brands-in-sector. Source: KPMG LLP 2024-25 US Customer Experience Excellence Report.

As is often the case, declining CEE scores are matched by a decline in NPS. Over the last four years, the healthcare sector NPS has decreased by a concerning 11 points. Reported 2024–25 recommendation drivers in healthcare, in order of importance, are quality of available services, value (price/rate), and range of available services. Almost half (49 percent) of responders reported a willingness to pay a premium for better experience with a healthcare company.



Targeting interventions

Though not drastic, the slippage in healthcare rankings marks a trend in the wrong direction. As noted, the sector average for empathy, arguably the most influential of pillars in healthcare, is the lowest of all pillar rankings.

Healthcare providers might do well to focus on personalizing customer interactions and emphasizing empathy to see NPS improvement. Prioritizing empathy might also boost resolution scores—currently the third-lowest pillar at 7.43 percent—by recognizing patient needs, such as understanding an invoice or getting a timely appointment, and helping to resolve those issues more quickly.

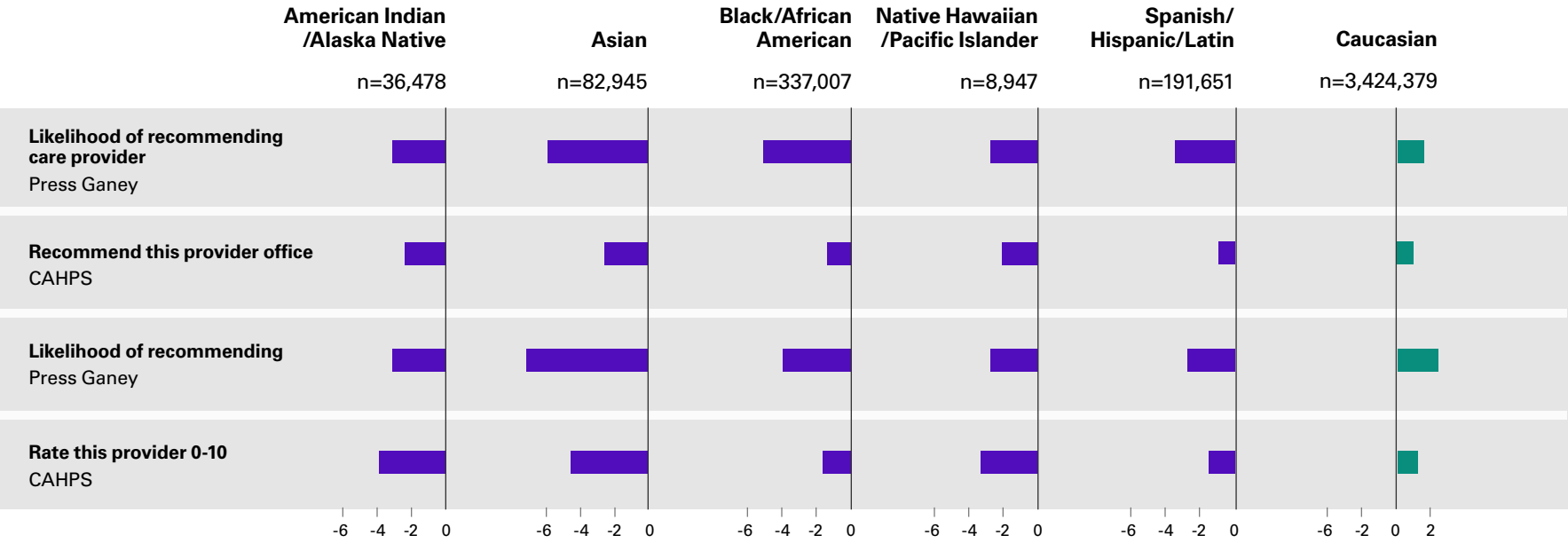
Successful interventions to improve rankings and pillar performance consider all of the intersecting points that combine to generate the overall satisfaction score. To shed further light on achieving excellence in patient experience, KPMG leveraged data and analysis from healthcare performance improvement solutions firm Press Ganey which suggest several junctures to explore to address improvements in patient experience:

Race and ethnicity: The needs and experiences of patients can differ widely by racial and ethnic group, care setting, as well as patient experience issue. Two examples: Many institutions continue to have poor pain control reports among Black patients on their obstetrical services. Patients identifying as Asian report the least positive experience in several key areas of medical practice.

Both Press Ganey research and that of the Hospital Consumer Assessment of Healthcare Providers and Systems indicate informative swings in assessment of care and likelihood to recommend by race and ethnicity.²

2. Press Ganey, *Industry Insights: Patient Experience in 2024*.

Compassionate Connected Care™

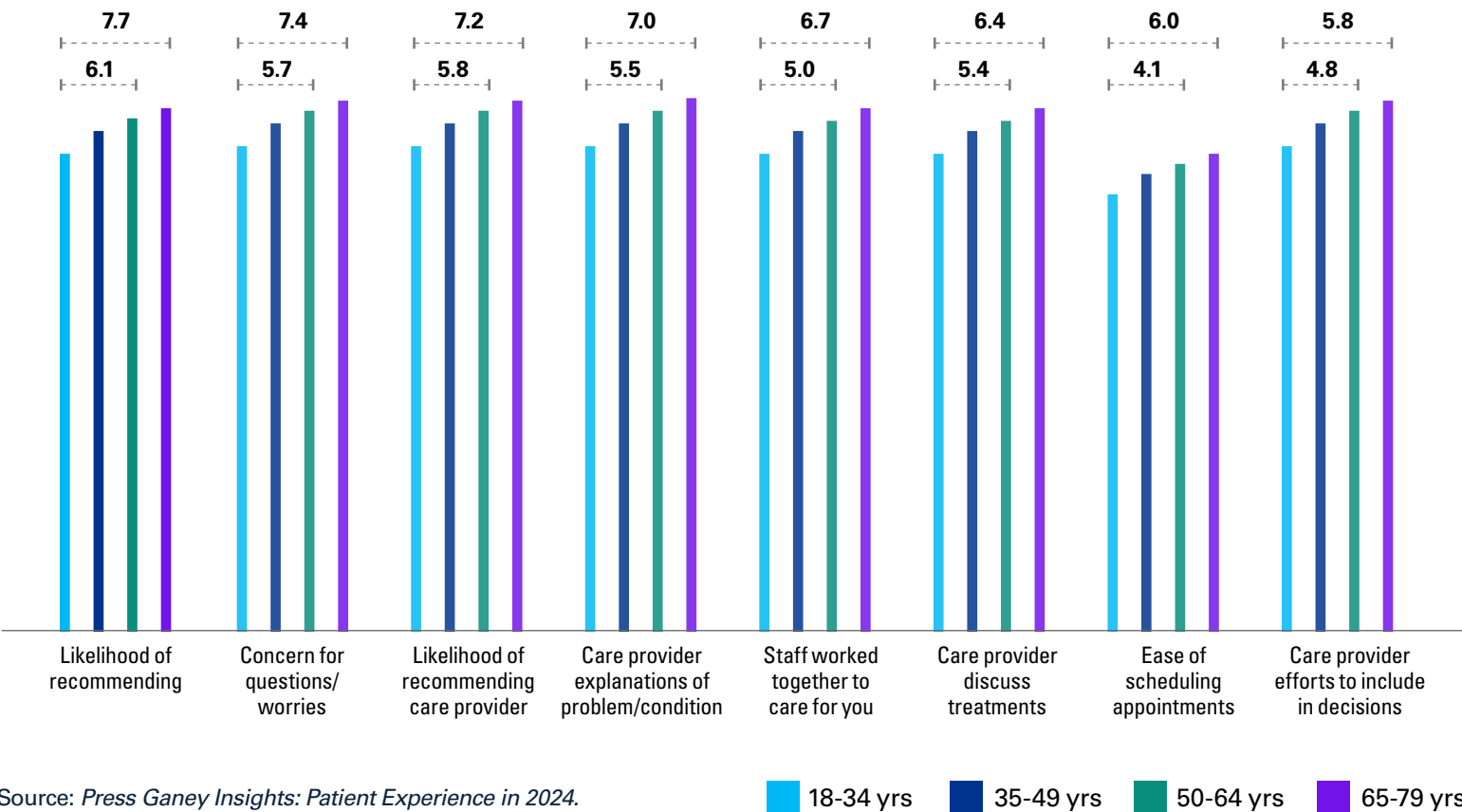


Source: Press Ganey Insights: Patient Experience in 2024.

Taking an equity lens to data, and dissecting it by demographic, setting, and clinical need, will facilitate a deeper understanding of all patient experiences, considering how different factors intersect and overlap. This will likely uncover a complex interplay of patient-provider interactions, individual backgrounds, social factors, and historical inequities.

Age and digital fluency: The aging of the baby boomer generation (born 1946–1964) continues to have a major impact on healthcare, but the needs of millennials (born 1981–1996) and Gen Z (born 1997–2012) have become a driving force in the sector. Millennial and Gen Z patients are digitally savvy, live in a world of instant gratification, and prioritize friction-free experiences. They do advance research, expect two-way dialogue, and want to be included in decisions about their health and care. These younger patients are more critical healthcare consumers than previous generations, scoring the lowest on patient experience—77.7 among people aged 18–34, and 80.3 for older millennials and younger Gen X (35–49).²

Items with largest disparities across generations



Source: Press Ganey Insights: Patient Experience in 2024.

2. Press Ganey, Industry Insights: Patient Experience in 2024.
3. Press Ganey, Industry Insights: Consumer Experience in Healthcare, 2025.



The demand for self-scheduling is a case in point. Booking an appointment is the “last mile” of patient acquisition. To seal the deal, convenience is key—which means online, portal, or app-based scheduling is nonnegotiable. Eighty percent of consumers say online scheduling influences their choice of provider, and 24 percent will walk away if booking an appointment isn’t as easy as making a dinner reservation. While many organizations have already embraced digital scheduling, there’s still room for improvement: Only one quarter of consumers call the experience “excellent.”³

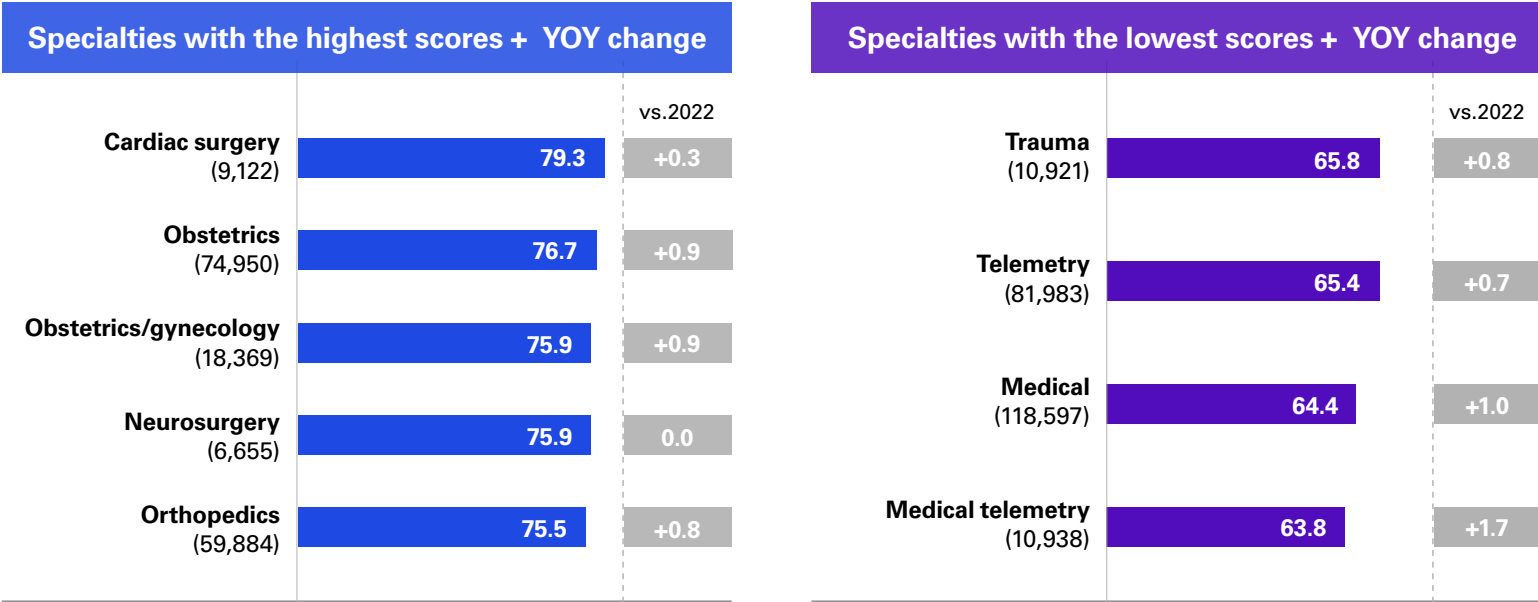
Another is the impact of social media and online ratings on selection of providers. Online reviews and recommendations are on par with professional referrals when it comes to selecting a provider. Fifty-nine percent of consumers now rely on online search—increasing among tech-native Gen Z and millennials—and they’ll be

put off from booking an appointment if they feel there’s not enough high-quality, reliable feedback from previous or current patients.³ Online recommendations are the new word of mouth, and healthcare organizations need to make sure they have a pipeline of robust reviews and testimonials if they want to compete.

While healthcare organizations must respond to the needs and expectations of more digitally adept generations, they must still honor the preferences, capabilities, and degree of access of less tech-forward consumers. Navigating these conflicting priorities requires a delicate balance—one that embraces innovation without alienating those who prefer more traditional methods. And one that offers a consistent experience for staff and patients so that switching between in-person, digital, or telephonic modes is a seamless hybrid experience.

Specialty and setting: Patient experience can vary by setting and specialty. Measuring patient experience in each reveals systemic trends and can inform strategies to improve patient experience. Planned inpatient admissions, for example, where care is coordinated across the continuum of care, see higher patient loyalty. Patients value presurgical preparation, clear communication throughout, and post-discharge support, and they tend to award top marks as a result. Conversely, specialties with lower likelihood to recommend (LTR) scores tend to be unplanned admissions.²

Specialities by LTR score

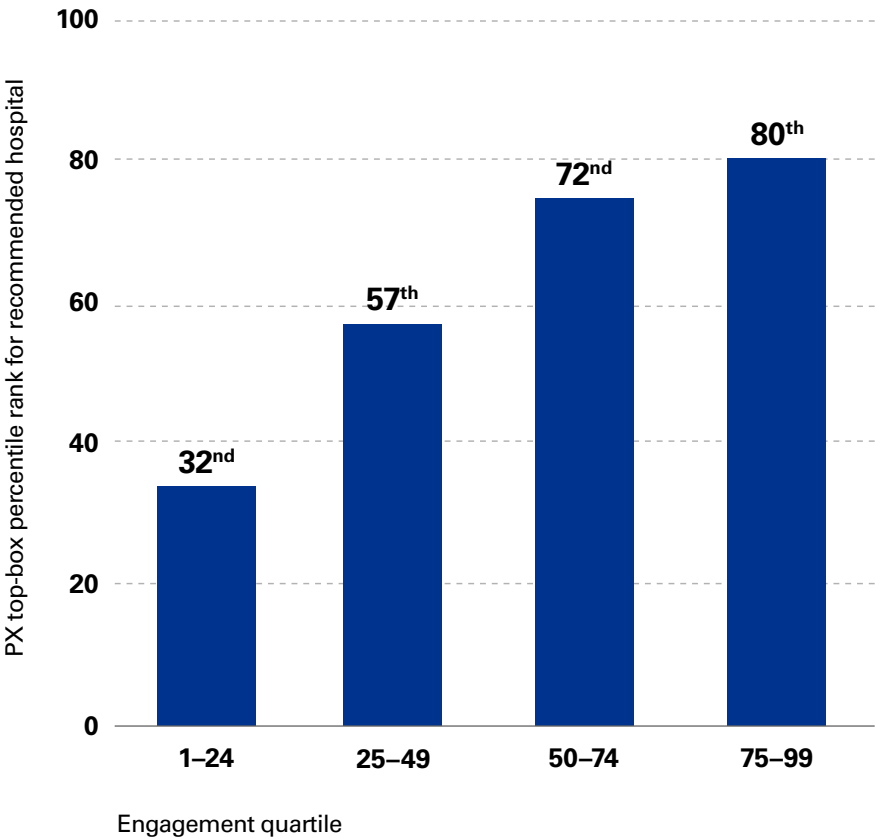


Source: Press Ganey Insights: Patient Experience in 2024.

Understanding the patient experience within particular areas of practice, and making appropriate adjustments, can improve overall patient satisfaction ratings for an organization. This might be a profitable area for the use of AI to help design and execute on business workflow architecture, care coordination, and provider communication.

Teamwork, role, and workforce engagement: Regardless of the type of care needed, patients’ perception of teamwork has emerged as a top driver of their overall likelihood to recommend in every care setting. A strong workforce goes hand in hand with exceptional patient experience. Facilities with highly engaged staff are three times more likely to also be top performers in patient experience. Across all care settings, teamwork and communication consistently rank as the number one driver of patient loyalty, which has held true for five years. In fact, patients at hospitals with the strongest teamwork are 1.3 times more likely to recommend it.² Within those teams, different professional roles also affect the patient experience differently. Patients have differing expectations of doctors, nurses, and hospital staff, each with their own impact on patient satisfaction.²

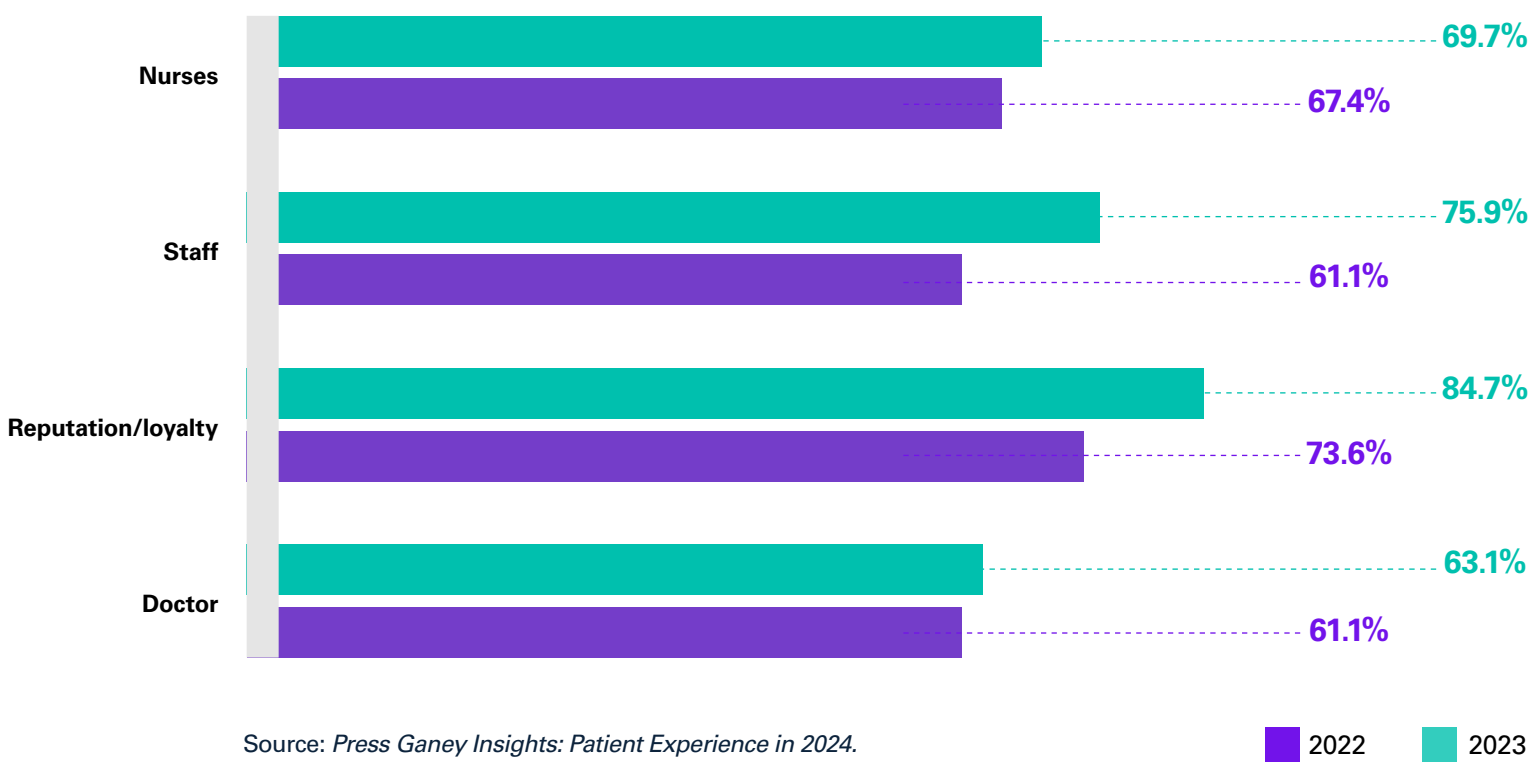
Impact of engagement on likelihood to recommend



Source: Press Ganey Insights: Patient Experience in 2024.

2. Press Ganey, Industry Insights: Patient Experience in 2024.

Patient sentiment: Percent positive

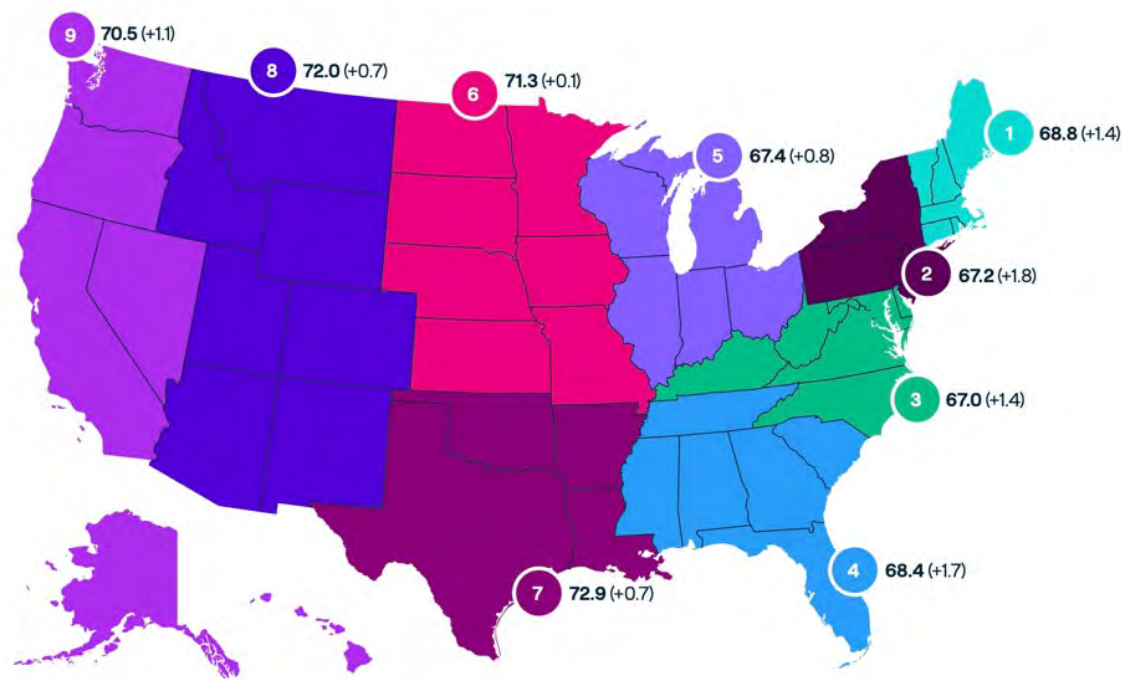


Paying attention to the needs and dynamics of the workforce can have a dramatic impact on improving patient experience and NPS.

Geography: Just as patient experience varies by demographic, specialty, and setting, it also varies by location. Patients in the middle of the country and the West (American Hospital Association, or AHA, regions 6–9) typically report higher scores than those in the Northeast, Mid-Atlantic, and South Atlantic states (AHA regions 1–3). Though all regions saw patient experience improvements in 2023, some made more significant strides than others. AHA region 2 (New Jersey, New York, and Pennsylvania) showed the biggest jump (a 1.8-point increase), more than doubling the rate of improvement (a 0.7-point increase) of AHA region 7 (Arkansas, Louisiana, Oklahoma, and Texas), which boasted the highest patient experience scores in 2023 (72.9).³

3. Press Ganey, *Industry Insights: Consumer Experience in Healthcare, 2025*.

American Hospital Association regions



Source: Press Ganey Insights: Patient Experience in 2024.

Segmenting variations in patient satisfaction by geography can help identify localities requiring attention.

Health plan membership: Patient experience and payor quality ratings are more closely linked than many may think. After all, members are patients and patients are members. NPS and their drivers do vary significantly from health plan to health plan. In the push to improve quality, payors have tended to focus on customer service, benefit design, and engagement.

Press Ganey research surfaced two new elements as the top drivers of member satisfaction: patient safety and patient privacy. In fact, patients who rated safety or privacy poorly in post-care primary care provider (PCP) surveys, on average, gave health plans one star for “rating of healthcare quality” and “getting needed care” in Medicare CAHPS surveys. Those who rated safety and privacy highly on average gave five stars. Medicare plans have an NPS 47 percent higher than commercial health plans.⁴ This tracks to the top 10 healthcare organizations cited in the *2024–25 KPMG US Customer Experience Excellence Report*, where insurers performed better than providers.

The path to excellence: Five ways to improve patient experience

To be successful, the willingness to improve patient experience must be matched with a deep and sophisticated understanding of all its constituent components, recognizing that the profile of your particular organization and patient base is unique. Here are five recommendations to help you understand the critical intersections in your organization and jumpstart improving your patients' experience.

1 Listen “broadly”: Leading organizations create feedback loops that give them a window into workforce satisfaction and engagement as well as the friction and frustrations patients face before and after care. Solicit that input and integrate plan member feedback as well. Listening can be done in several ways, including gathering passive and active

feedback through digital interactions, social media, and review sites. Tuning in to unconventional channels dials up the volume on even the quietest voices—people who may not “speak up” in the traditional sense but have plenty to say and insights to offer. Include providers, patients, and families in the conversation to shape the evolution of patient experience. Consider using advisory groups; these can provide qualitative feedback and make stakeholders feel more informed and involved. In addition to utilizing direct feedback mechanisms, you can “listen” through your operational data to validate “voice of the customer” commentary and see trends and correlations in patient interactions and behaviors—frequency of appointment reminders sent, how far in advance by patient cohort/population, and associated rates of no-shows or late cancellations, for example. Listening means understanding data deeply and thoroughly to make appropriate changes at scale.

2 Go granular: Move beyond national benchmarking with regional, local, facility, unit, and specialty comparisons. Looking at national benchmarks is an important start in improving patient experience. But to stay competitive, following local trends and going even deeper is key. Assessing patient experience performance across geographies, patient care units, and other smaller units of analysis, such as provider role, can help you identify where to allocate resources, so areas most in need get the most support.

3 Parse and scale: Data segmentation peels back the layers of patient experience, letting your organization more deeply understand different populations. Then AI and natural language processing (NLP) can help your organization analyze unstructured narrative data and interpret hundreds of thousands of verbatim comments, flagging areas for remediation and structuring feedback into actionable themes and insights. This can help you prioritize patients with

the poorest experiences and develop targeted improvement strategies, including optimizing process workflows and how to best configure technologies to meet preferences and needs.

4 Make booking a breeze: Healthcare organizations are constantly trying to improve access. And, while consumers may be willing to wait for the right provider, convenience can tip the scales in your favor—or not. Empowering consumers to book appointments at their first point of contact simplifies the “last mile” of their care journey. It makes the process smoother and more efficient, reducing friction at a crucial touchpoint, so your patient relationships start strong from the get-go. And don’t forget the provider side of the experience—internal change management is critical to help ensure smooth adoption and a favorable experience for healthcare staff. Controls and scheduling algorithms must be thoughtfully embedded into the scheduling technology to help ensure accuracy. And be sure to establish seamless paths to handle the escalation of a patient from a digital to nondigital medium, when required to complete scheduling, so that resolution and empathy pillars are successfully addressed.

5 Prioritize the human touch: The human experience is of uppermost importance. Any technology implementation, particularly the use of AI, must be human-centered and must address key pain points, not introduce more. When used as a front-line interface, technology can easily become a barrier that can deter users, not only from the transaction but also from your organization. You can look to increase efficiencies and reduce costs, but not at the expense of your customer or employee relationships. Focus on creating value, for you, your patients, and your employees, and above all, help ensure that your use of advanced technologies is transparent, ethical, and responsible, and that it safeguards user privacy.

Mapping a way forward

Responding effectively to employee and consumer feedback, expectation, and demand to meet experience excellence goals is becoming increasingly important to healthcare organizations.

By taking an integrated approach to improving experience, founding it on data-supported and tools-led insights, you can identify and address critical intersections in your service delivery and make targeted enhancements to achieve rapid results and measurable advantage. KPMG can help you undertake swift analyses of your current situation, identifying opportunities and developing road maps to help you compete effectively and further your organization's growth strategies.



About Press Ganey

Press Ganey, a leading healthcare performance improvement solutions company, offers an integrated suite of solutions that put human experience at the center of healthcare enterprise transformation.

Delivered through a cutting-edge digital platform built on a foundation of data security, Press Ganey solutions address patient experience, healthcare consumer experience, workforce engagement, safety, clinical excellence, and more. Guided by its team of renowned healthcare thought leaders, Press Ganey works with more than 41,000 healthcare facilities to reduce patient suffering, enhance caregiver resilience, and improve the overall safety, quality, and experience of care. Press Ganey is a PG Forsta company.

About KPMG Healthcare

At KPMG, we believe healthcare providers and payors can use technology and innovation to provide higher-quality care, reduce costs, and deliver a more patient-centric experience.

Our mission is to assist organizations to transform and innovate in order to effectively compete in tomorrow's fast-changing and dynamic healthcare industry. We offer a market-leading portfolio of methodologies, tools, and services to assist healthcare policy makers, payors, providers, and suppliers as they tackle challenges and transform the way healthcare is delivered around the globe. **Learn more.**



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