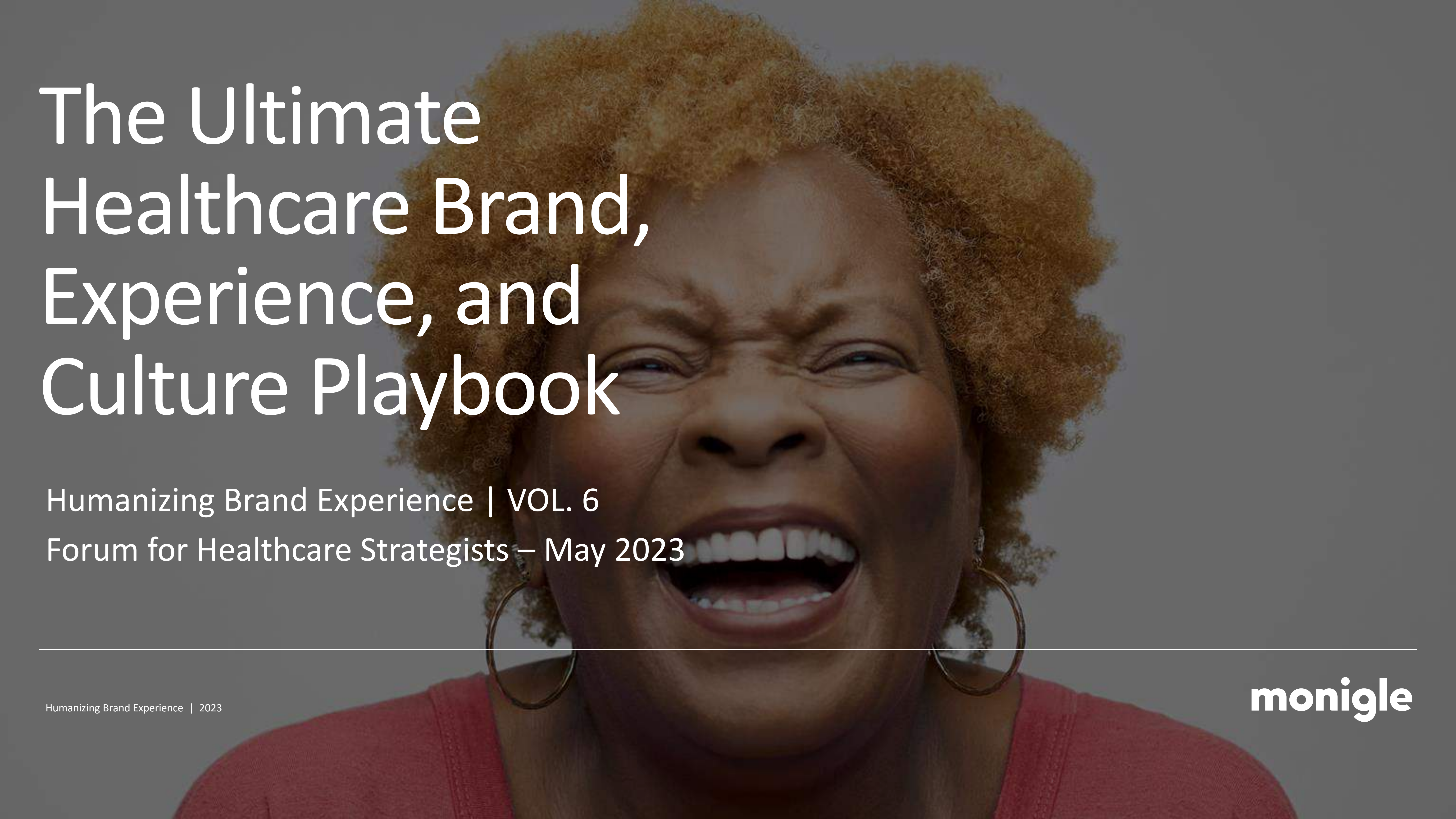

The Ultimate Healthcare Brand, Experience, and Culture Playbook

Humanizing Brand Experience | VOL. 6

Forum for Healthcare Strategists – May 2023

monigle

YOUR SPEAKERS

GRANT MASON

Head of Behavioral Insights

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Grant leads Monigle's Behavioral Insights Group and Humanizing Brand Experience annual study. A researcher, social scientist and design thinker, Grant has helped Fortune 500 companies translate human insight into behavior-changing strategy for over 17 years across 3 different continents. Prior to working for Monigle Grant was a Partner at Hall & Partners in Sydney, Australia.

CAROLYN BUGG

Executive Director, Strategy

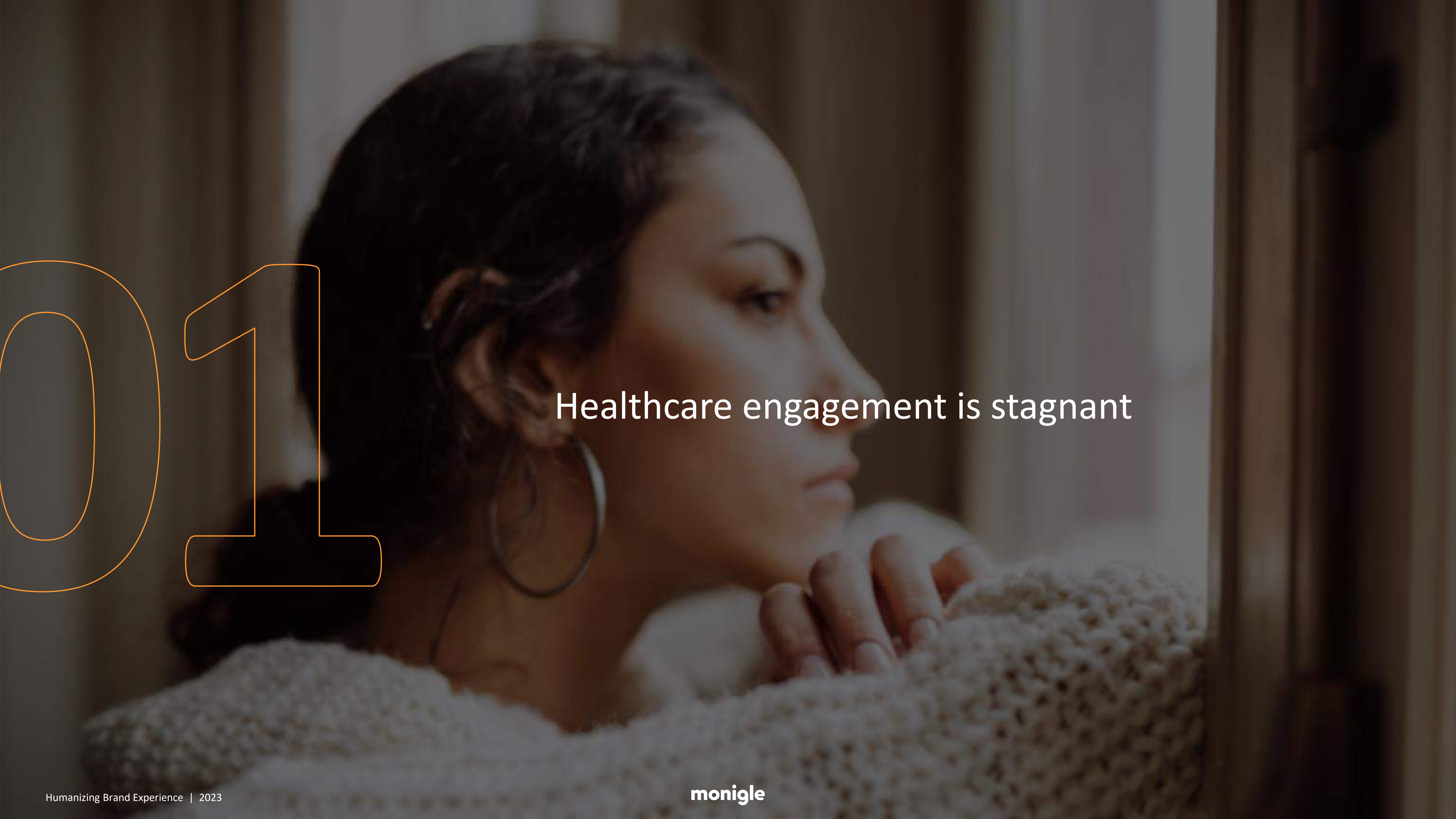
monigle

Carolyn leads the organization's Strategic Discipline. For over 17 years, Carolyn has worked at the intersection of human behavior, creative development, and business strategy. Her experience with top global and national brands has afforded her the unique opportunity to work across a wide variety of business verticals and initiatives.

Engagement is stagnant, and the value we provide is shifting—inside and out.

How do you make a more human impact?

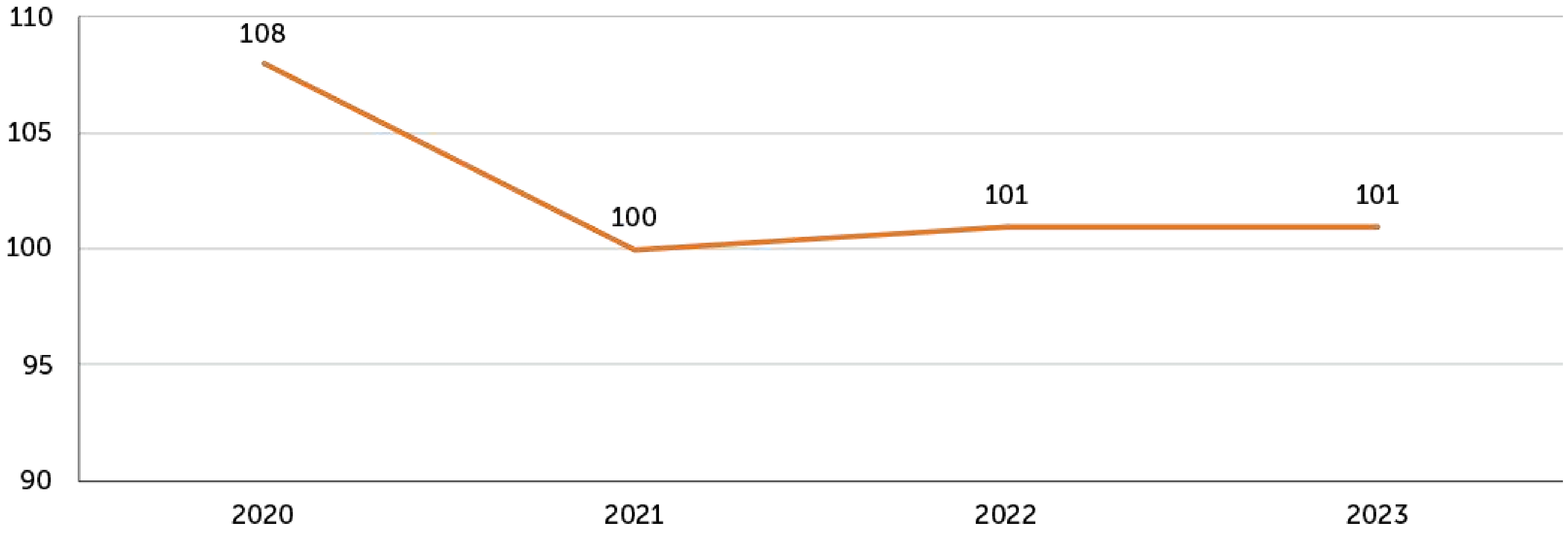
12 CHAPTERS WE CAN DISCUSS



01 Healthcare engagement is stagnant

Peoples' engagement with the category is flat; we're not engaging them in meaningful ways

2020-2023 HEALTHCARE ENGAGEMENT INDEX



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Data Index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence and Advocacy

Proactivity and goal-setting is growing in importance while trust continues to deteriorate

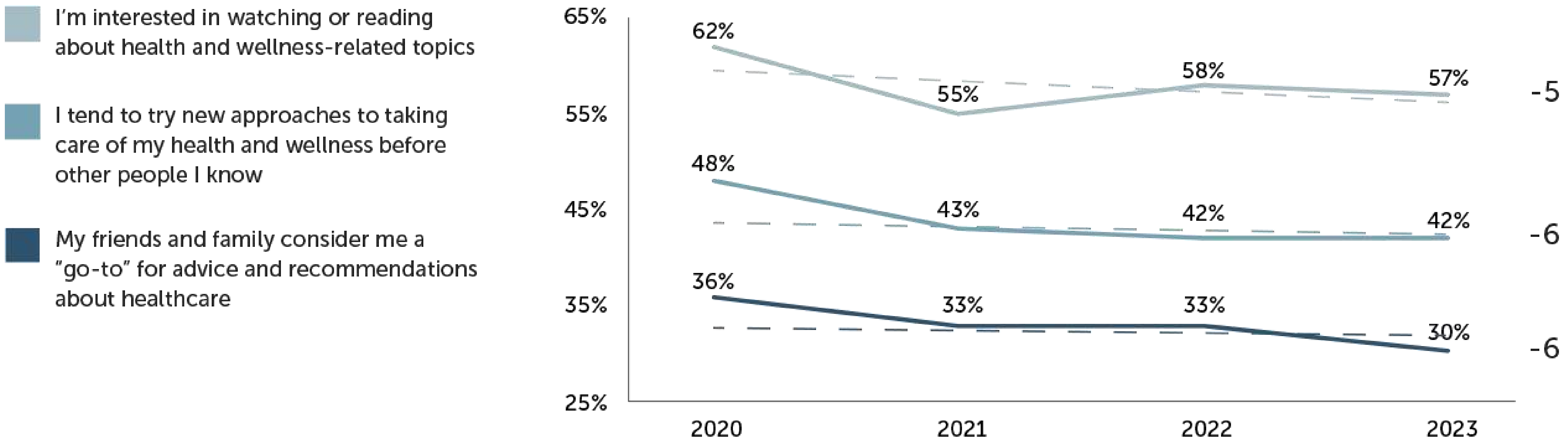
2022-2023 HEALTHCARE ENGAGEMENT–ALL MEASURES

Measure	Statement	2023	2022	CHANGE 2022-2023
EMOTIONAL VALUE	I feel peace of mind after receiving healthcare services or treatment	73%	72%	+1
PROACTIVITY	I often do my own research on my symptoms and/or treatments	71%	69%	+2
SYMBOLIC (FINANCIAL) VALUE	I think it is worth the extra cost to go to the best healthcare provider or facility	65%	64%	+1
TOPICAL INTEREST	I'm interested in watching or reading about health and wellness-related topics	57%	58%	-1
PERSONAL GOALS	I set healthcare goals for myself and track my progress toward them	53%	50%	+3
CATEGORY PARTICIPATION	I tend to avoid getting healthcare services unless I'm really sick or injured	51%	51%	-
HOLISTIC ENGAGEMENT	I value holistic healthcare that treats the whole person - mind, body and spirit	49%	50%	-1
CONTROL	I (do) always trust my healthcare provider to make the right decisions for me	44%	49%	-5
INNOVATIVENESS	I tend to try new approaches to taking care of my health and wellness before other people I know	42%	42%	-
INFLUENCE AND ADVOCACY	My friends and family consider me a "go-to" for advice and recommendations about healthcare	30%	33%	-3

Base All U.S. nationally balanced respondents 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement.
Data Top 2 Box Scores

People seem less interested in our content, trying new things and individuals may see their influence becoming less important

2020-2023 HEALTHCARE ENGAGEMENT–TOPICAL INTEREST, INNOVATIVENESS AND INFLUENCE AND ADVOCACY



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Data Top 2 Box Scores

Engagement levels vary across the country—where is your market?

	2021 Index	2022 Index	2023 Index	Change 2022-2023
Miami	123	123	126	3
Gainesville	**	**	123	**
Charleston	**	**	122	**
Columbus	114	116	120	4
Los Angeles	114	118	120	2
Atlanta	115	115	120	5
Jacksonville	**	**	118	**
New York	119	117	118	1
Birmingham	111	113	118	5
Raleigh-Durham	104	111	118	7
Ann Arbor	107	116	117	1
Myrtle Beach^	114	109	117	8
Charlotte	107	113	116	3
Orlando	111	118	116	-2
New Orleans	108	116	116	0

	2021 Index	2022 Index	2023 Index	Change 2022-2023
Orange High Desert	111	113	116	3
New Jersey	120	118	115	-3
Houston	114	116	113	-3
Tampa	99	113	113	0
New Haven	106	111	113	2
Greenville	**	**	112	**
DC	107	115	112	-3
San Diego	108	113	112	-1
Baltimore	106	112	112	0
Virginia	104	118	111	-7
Phoenix	106	117	111	-6
Cleveland	102	117	111	-6
Salt Lake City	96	113	111	-2
San Antonio	105	113	111	-2
Philadelphia	108	117	110	-7

The Healthcare Engagement Index is a multimarket index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence and Advocacy.

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^Market formerly referred to as South Carolina
*New market for 2022
**New market for 2023

Engagement levels vary across the country—where is your market?

	2021 Index	2022 Index	2023 Index	Change 2022-2023
Chicago	108	115	110	-5
Illinois	109	110	110	0
Las Vegas	109	118	109	-9
Indianapolis	101	115	108	-7
St. Louis	103	114	108	-6
Kansas City	103	115	107	-8
Omaha	95	110	107	-3
Boston	102	109	107	-2
Denver	106	109	107	-2
Boise	95	118	107	-11
South Bend	99	113	106	-7
Sacramento	*	111	106	-5
Dallas	108	114	106	-8
Cincinnati	97	112	105	-7
Austin	118	115	104	-11

	2021 Index	2022 Index	2023 Index	Change 2022-2023
Grand Rapids	99	113	104	-9
Portland	93	110	104	-6
Pittsburgh	99	109	104	-5
San Francisco	108	116	104	-12
Detroit	107	123	104	-19
Milwaukee	92	111	103	-8
Minneapolis	97	116	102	-14
Greater New Hampshire	*	109	101	-8
Albuquerque	98	109	101	-8
Seattle/Washington	97	109	101	-8
Rochester	**	**	100	**
Iowa	**	**	97	**
Green Bay, WI	*	113	96	-17
Maine	97	97	94	-3

The Healthcare Engagement Index is a multimarket index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence and Advocacy.

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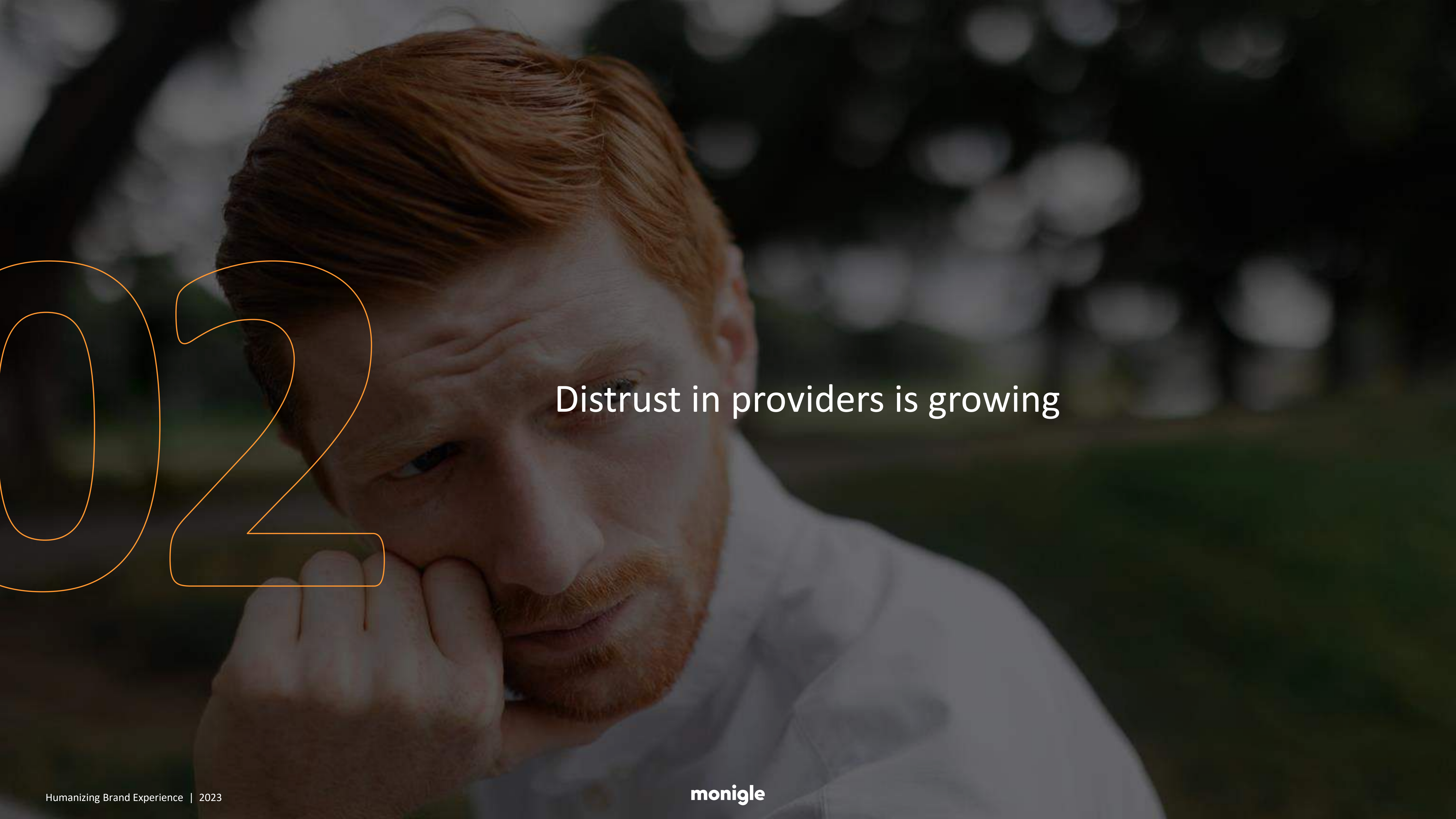


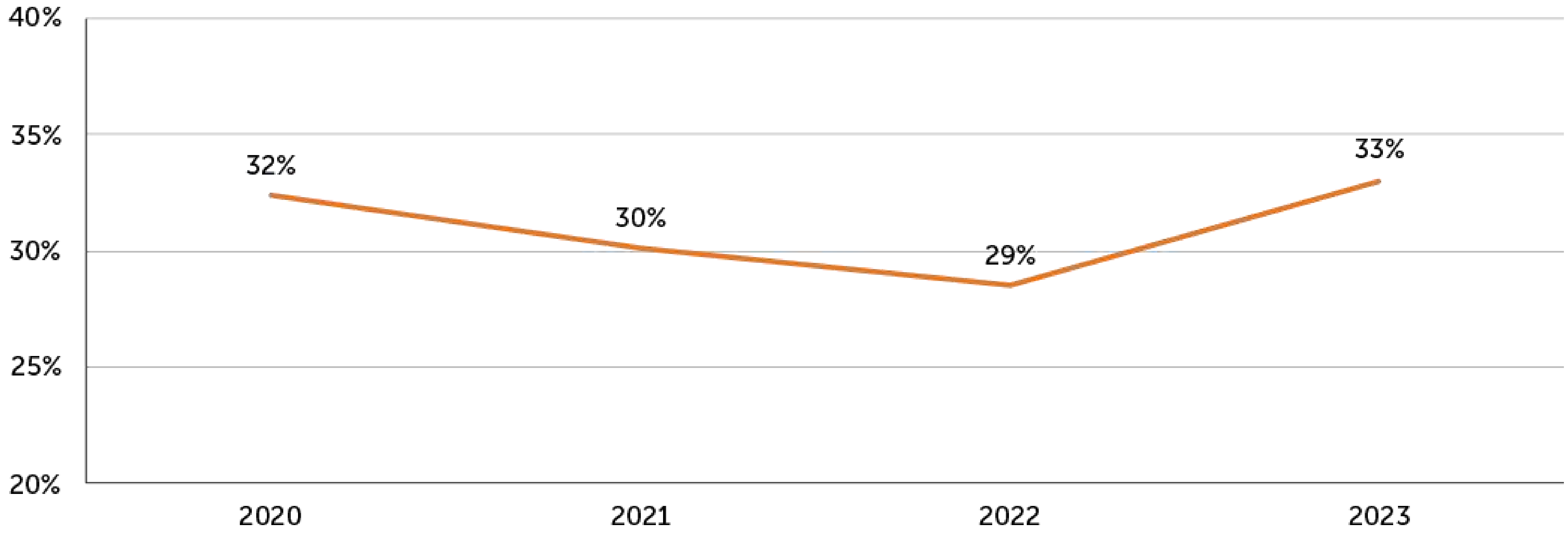
02

Distrust in providers is growing

As evident in the spike in our control metric, people indicate that they trust less and less

2020–2023 HEALTHCARE ENGAGEMENT–CONTROL

"I don't always trust my healthcare provider to make the right decisions for me."

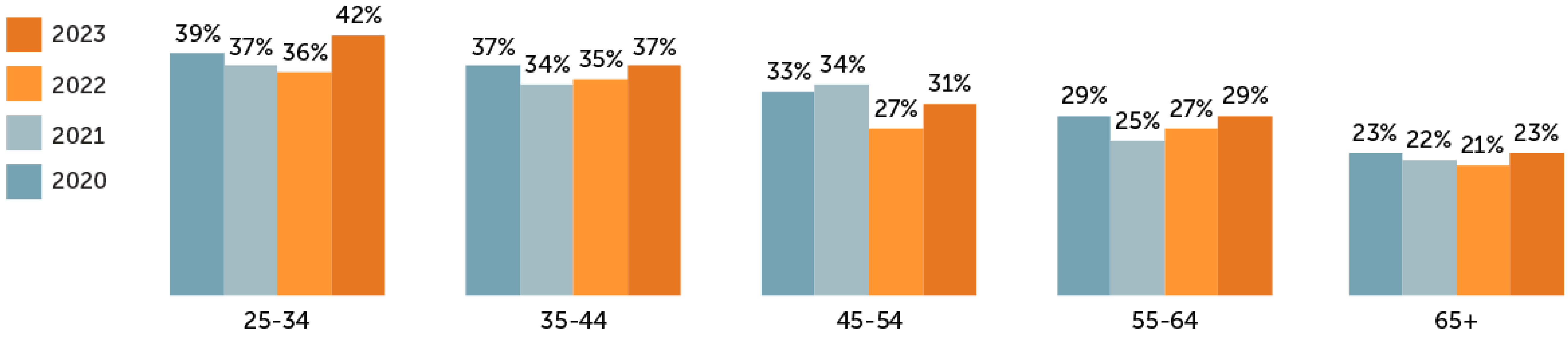


Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with the statement: I don't always trust my healthcare provider to make the right decisions for me.
Data Top 2 Box Score

Distrust is higher among younger audiences

DISTRUST OF HEALTHCARE PROVIDERS BY AGE GROUP

"I don't always trust my healthcare provider to make the right decisions for me."



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QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with the statement: I don't always trust my healthcare provider to make the right decisions for me.
Data Top 2 Box Score

If we want to build trust, the path is with people and empowerment

TOP 10 ATTRIBUTES MOST CORRELATED WITH TRUST (IS AN ORGANIZATION THAT PEOPLE TRUST)

	Pearson Coefficient (r)
CARING STAFF Has people that clearly care about the work that they do	0.73
SELF-CARE Empowers me with the information and resources I need to manage my health independently	0.69
RESPECTED STAFF Treats their employees with respect	0.69
STAFFING Always has enough staff to service my healthcare needs and the needs of the community	0.68
INDIVIDUALIZATION Makes me feel like the top priority when I'm getting care	0.68
SECURITY Gives me reassurance that they will be there for me when I need them	0.68
QUALITY OUTCOMES Provides the best medical outcomes for people	0.68
CONFIDENCE Gives me confidence in my long-term health and wellness	0.67
HEALTH GOALS Helps me to define and meet my health goals	0.67
MENTAL HEALTH Are leaders in mental health and wellbeing	0.67

QB11 Last, based on what you know about [BRAND], in your opinion, how well do the following statements describe them? Is an organization that people trust

Data Correlations ranks for "Is an organization that people trust" and all other statements listed

Top 10 most trusted healthcare brands

Rank	Brand	
1	Emory Healthcare	82%
2	University of Iowa Health Care	81%
3	Northwestern Medicine	79%
4	Mayo Clinic*	79%
5	Johns Hopkins Medicine*	77%
6	UT Southwestern Medical Center	75%
7	OhioHealth	74%
8	Cedars-Sinai	74%
9	Ochsner Health	74%
10	UChicago Medicine	74%

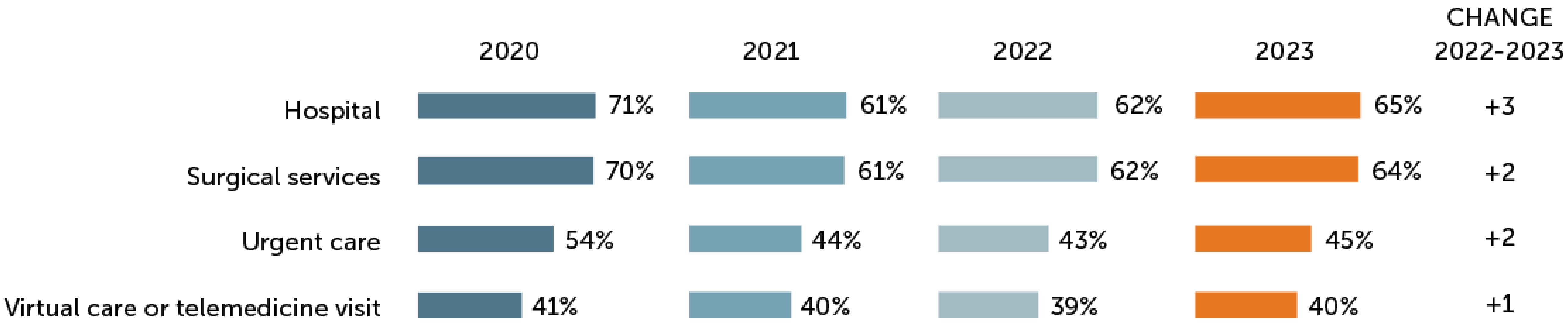
*Multiple markets NET score

03

Systemness still has its benefits

Preference for channels offered by systems is growing…

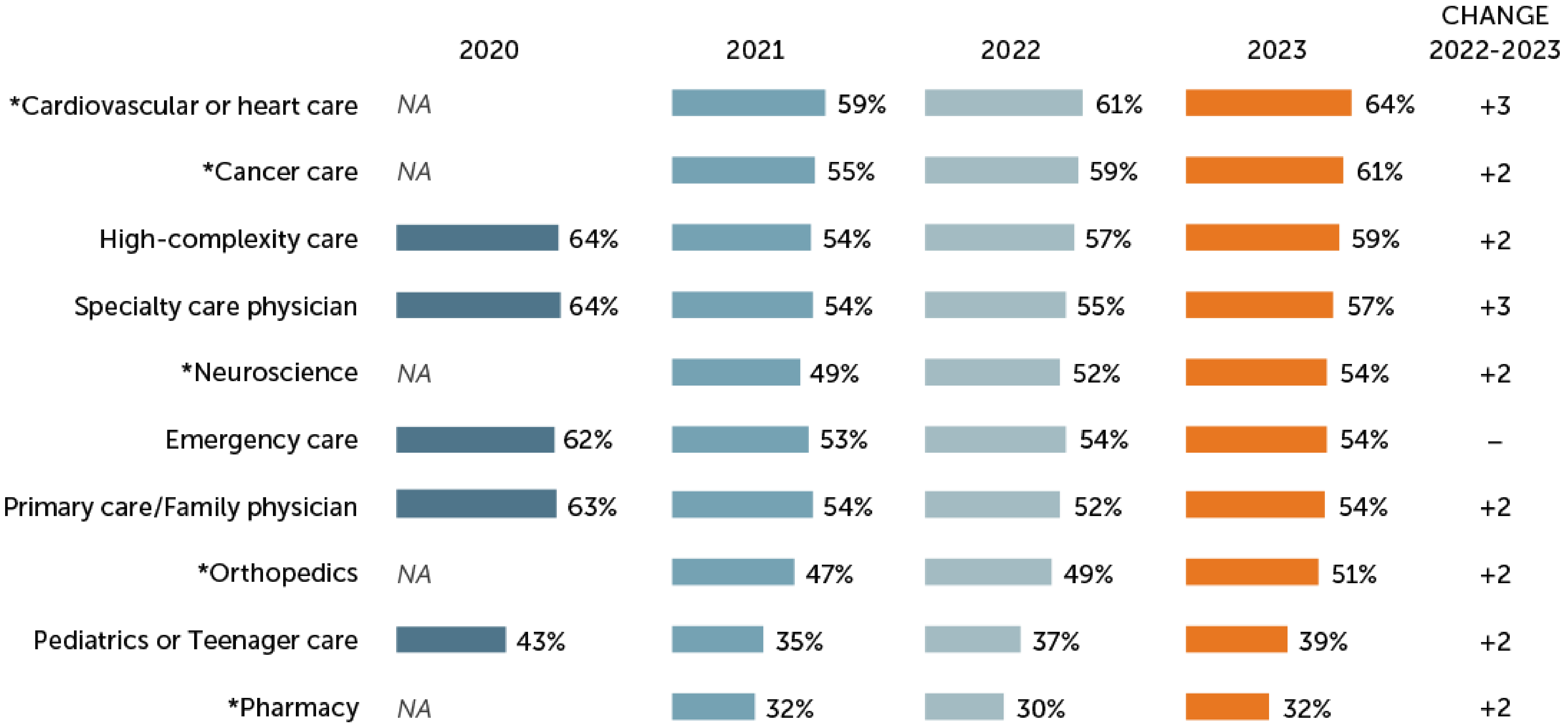
2020-2023 SYSTEM PREFERENCE (CHANNELS)



Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QY1 Below is a list of different types of healthcare offerings. For each, please indicate whether you are more likely to use a service that is offered at an independent facility or a healthcare system.
Data Top 2 Box (Much more likely to use as part of a healthcare system + Likely to use as part of a healthcare system)
* New service lines included from 2021

…while people also appear to prefer service lines from systems

2020-2023 SYSTEM PREFERENCE (SERVICE LINES)



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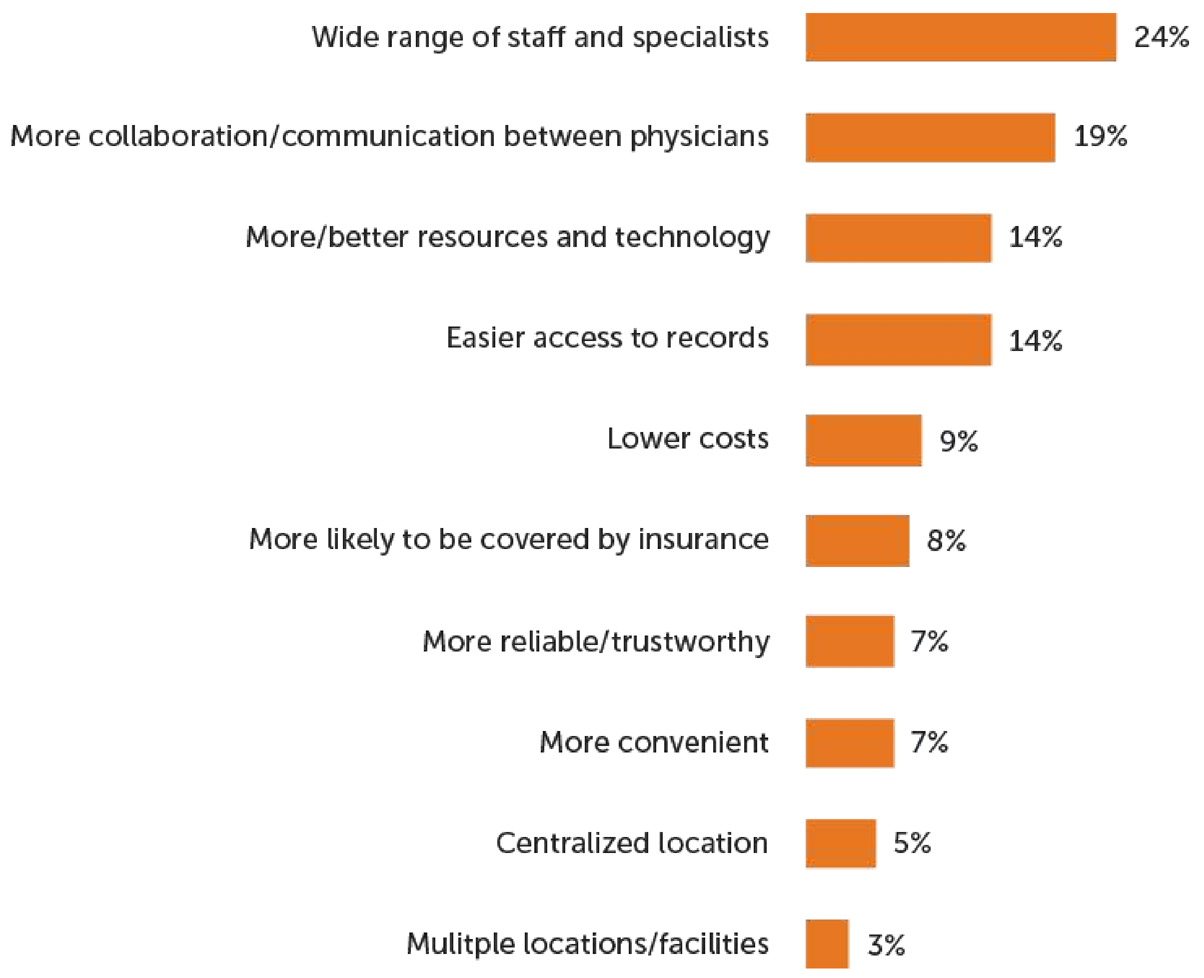
QY1 Below is a list of different types of healthcare offerings. For each, please indicate whether you are more likely to use a service that is offered at an independent facility or a healthcare system.
Data Top 2 Box (Much more likely to use as part of a healthcare system + Likely to use as part of a healthcare system)
* New service lines included from 2021

The benefits of systemness are found in the diversity of the offering and the potential for stronger collaboration

2023 SYSTEMNESS (UNAIDED)–TOP BENEFITS



"It is easier to get appointments with specialists if needed. It is also better for tracking your total healthcare; your records would be more accessible to each area within the healthcare system."
- Female, 71, Ohio

"I think it is because the healthcare system makes it easier for the doctors to share information about a patient. I know my doctors are communicating with each other more than they have in the past."
- Male, 53, Massachusetts

"You have access to more opinions and tests to evaluate your health issues. Independent facilities will likely make referrals to healthcare systems."
- Female, 64, Nevada

Base U.S. nationally balanced respondents 2023 (500)
QBS4 More and more people today prefer to use healthcare systems* for their healthcare over and above independent facilities. Why do you think this is? In your opinion, what are the benefits of using a healthcare system* instead of an independent facility?
Data Coded verbatim

Systemness means something unique to UCSF Health, and there's a lesson in defining your systemness for all organizations in the space.

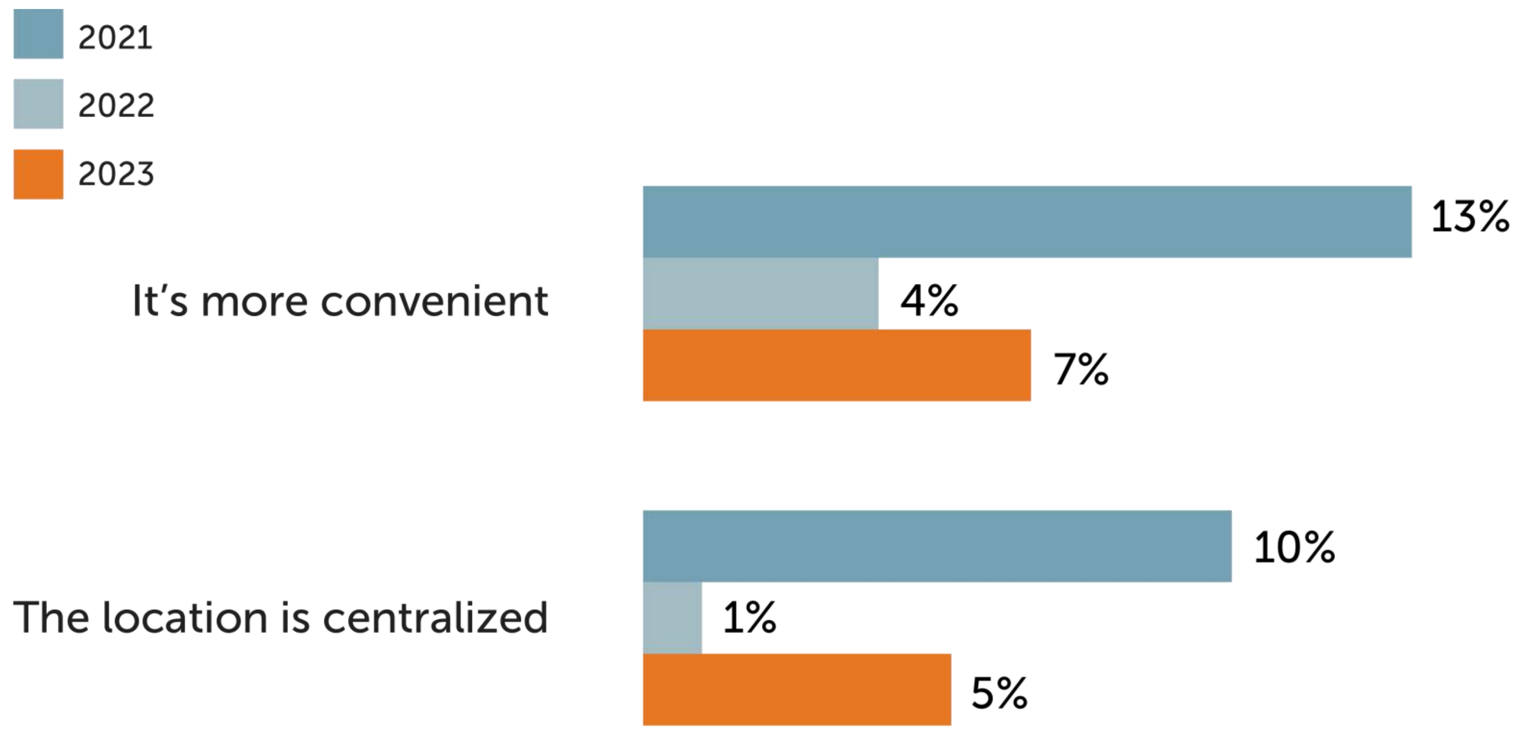
The culture of systemness

– By Sarah Sanders, Chief Marketing and Brand Experience Officer, UCSF Health

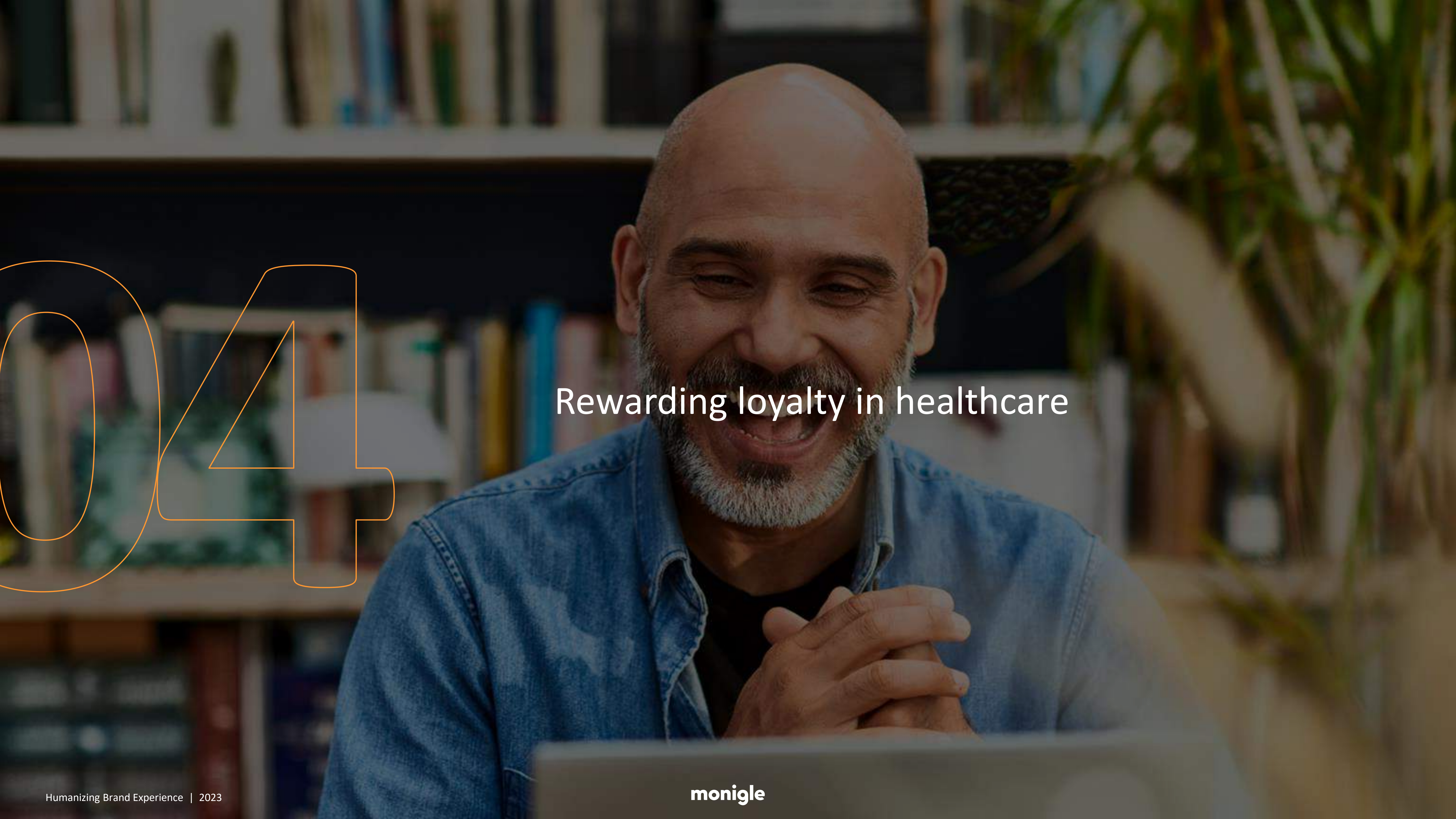
- Investing in more meaningful ways to expand opportunities and tackle the universal challenges around access to deliver more personalized experiences between providers and people.
- Looking at expansion through a more thoughtful, intentional lens to reach everyone, especially populations who deserve better care and increased access.
- Operating less as a top-down system-centric story and more as an authentic one reflective of what's most important to our patients.

Where are systems standing out?

2021-2023 UNAIDED REASONS FOR CHOOSING A HEALTH SYSTEM OVER INDEPENDENTS



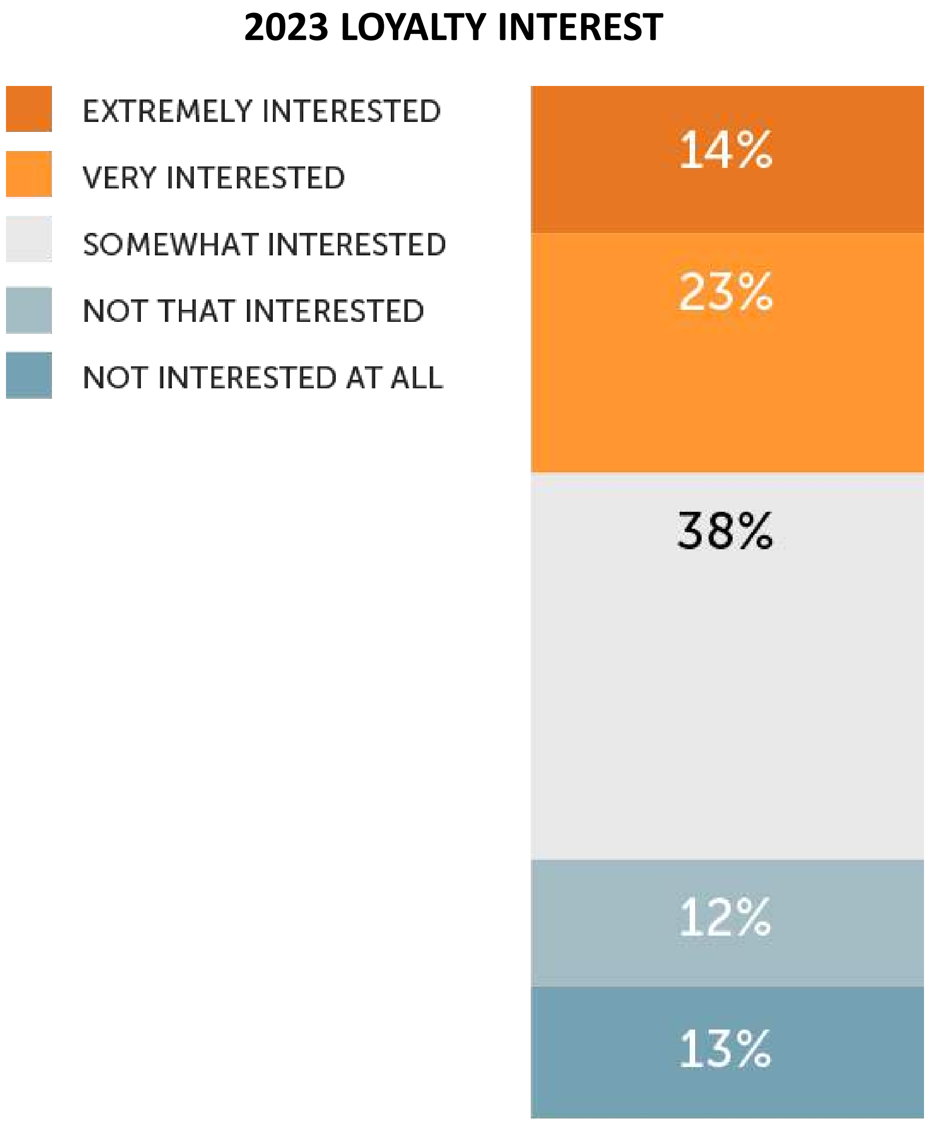
Base All U.S. nationally balanced respondents 2021 (505), 2022 (490), 2023 (500)
QBS4 More and more people today prefer to use healthcare systems* for their healthcare over and above independent facilities. Why do you think this is? In your opinion, what are the benefits of using a healthcare system* instead of an independent facility?
Data Coded verbatim



04

Rewarding loyalty in healthcare

Loyalty programs represent new territory in our category



"I think a loyalty program for the healthcare system could work. You can reward people for maintaining a healthier lifestyle such as eating better foods, exercising and going to their doctor for regular checkups. And in return the patient could get some sort of reward or benefit."
- Female, 46, Texas

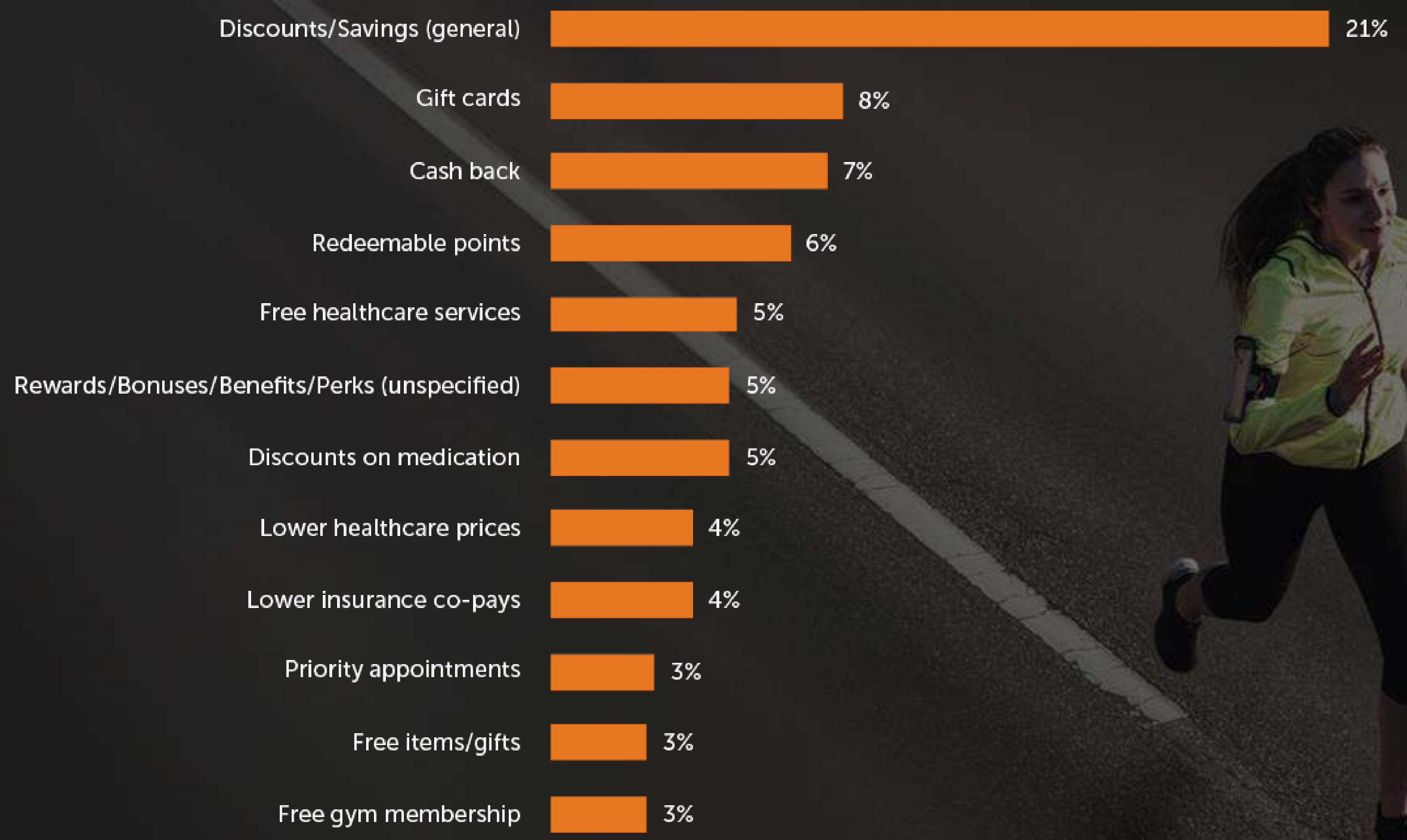
"Maybe an app that helps take your recommended visits over time (i.e., checkups/shots) and rewards you for scheduling appointments in a timely fashion. Maybe the points could be used for a free flu shot, or gift cards."
- Male, 33, California

"It would be nice if you received a reward for doing preventive maintenance healthcare like doing an annual exam, pap, mammogram etc. and it gave you a percentage off towards other more expensive procedures like if you need surgery or something like that."
- Male, 33, Idaho

Base All U.S. nationally balanced respondents 2023 (3000)
QL1 How interested would you be in a loyalty program for healthcare where you are rewarded/receive benefits for keeping the majority of your healthcare within a single healthcare system?
Data Selection frequency

There is potential opportunity in loyalty-based benefits

2023 LOYALTY (UNAIDED)–TOP REWARDS AND BENEFITS



Base U.S. nationally balanced respondents 2023 (500)
QBS3 Loyalty programs reward people for repeatedly buying products/services from the same organization and are popular with airlines, credit cards and retail stores. Could a similar loyalty program work in healthcare that encourages you to receive the majority of healthcare services from a single healthcare system*? What would this loyalty program look like? What kinds of rewards and benefits would you want/expect to receive for being loyal to one health system?
Data Coded verbatim

Whether you offer a formal program or not, the reality is that loyalty in healthcare is hard won

2023 LOYALTY PERKS –TOP 2 BOX

Base All U.S. nationally balanced respondents 2023 (3000)
QL2 How loyal would you be to the same healthcare system if they offered you the following rewards/benefits?
Data Top 2 Box Scores

05

Proactive pushback and the rise of the Doctor Dodger

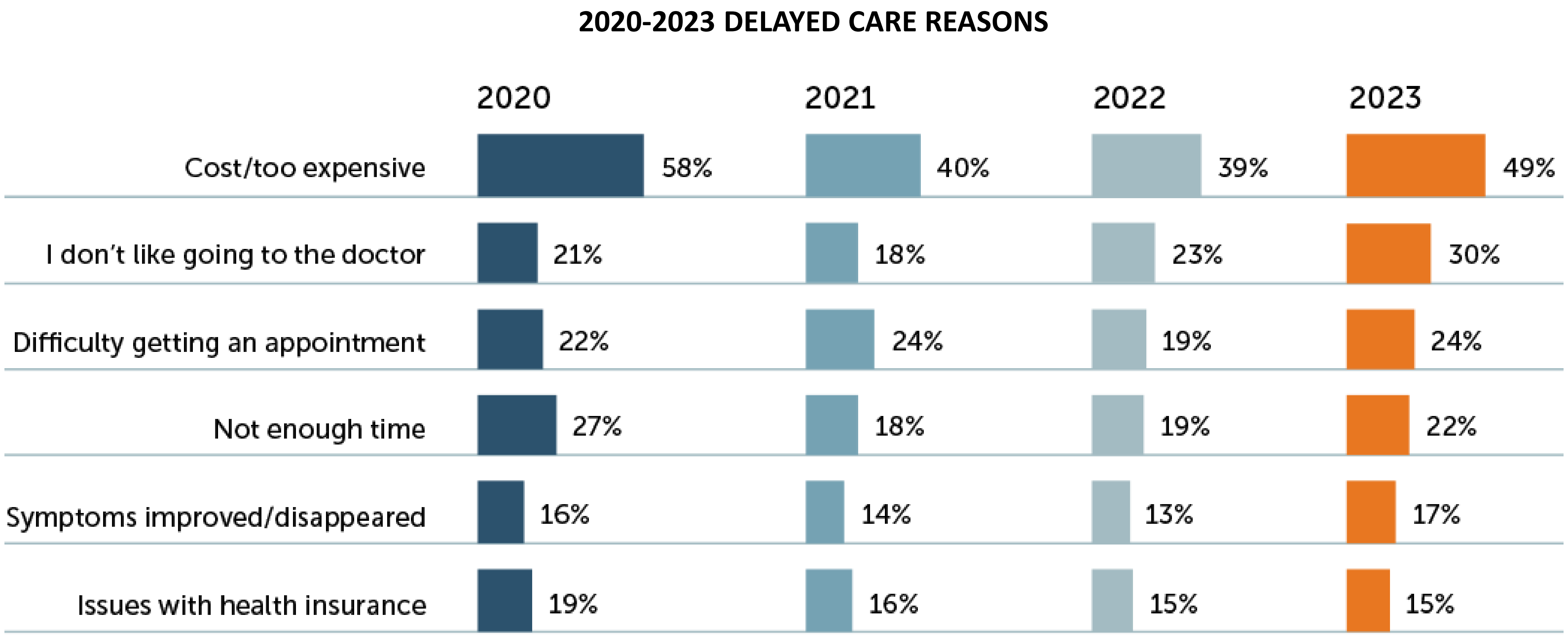
More people are only engaging with healthcare when they absolutely have to while becoming less proactive with their health

2022-2023 CHANGE IN HEALTHCARE ATTITUDES–TOTAL

	2022	2023	△
I only go to the doctor when I am sick	27%	35%	8
I am proactive when it comes to managing my health	70%	62%	8
I avoid going to the doctor, even when I need to	10%	17%	7
I don't have the time to go to the doctor	15%	22%	7

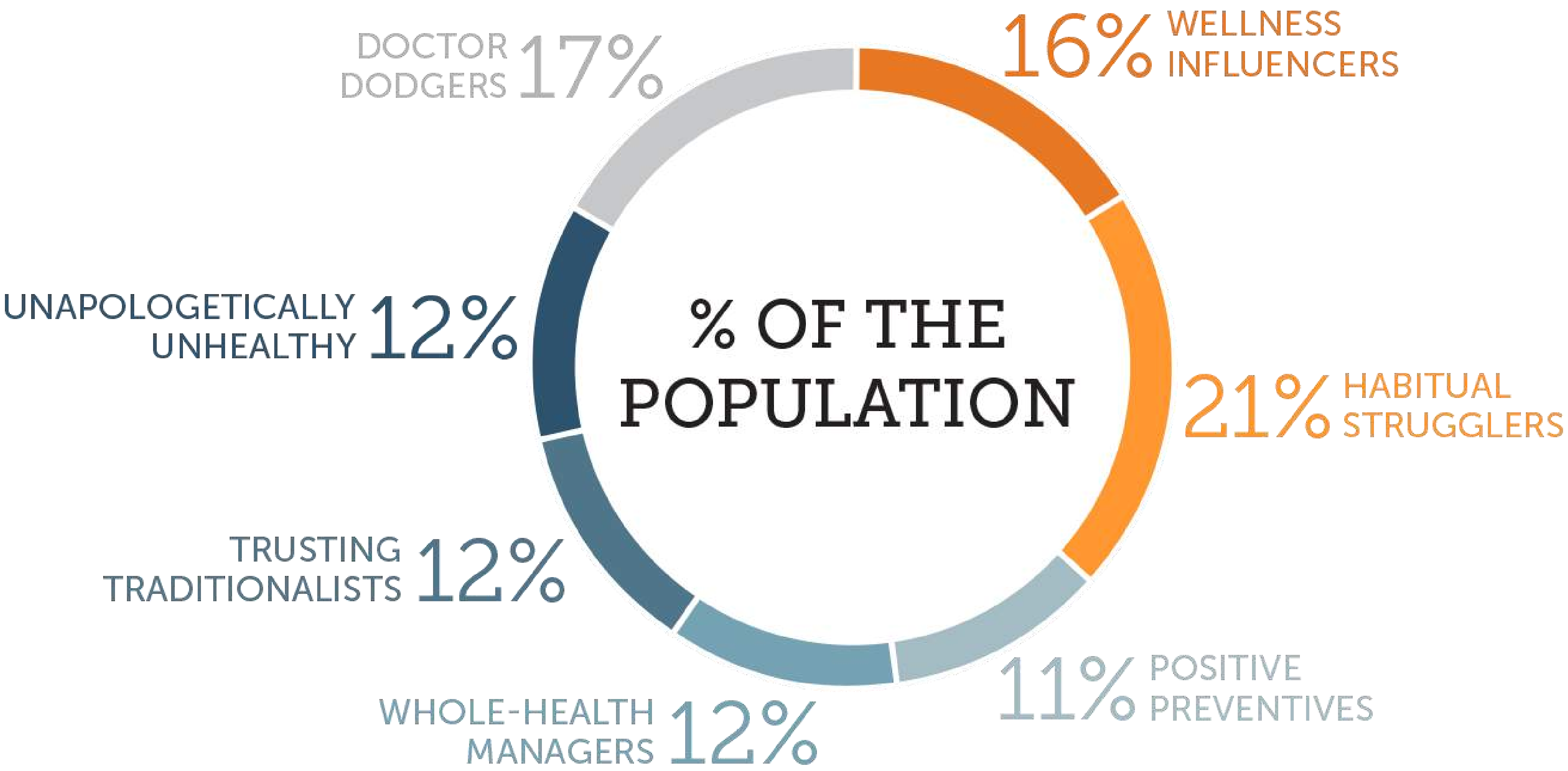
Base All U.S. nationally balanced respondents 2022 (1102), 2023 (3000)
QT1 Below is a set of statements that other people have used to describe their attitudes towards managing their health and healthcare. Of the two statements, which one best describes you?
Data Selection frequency

Delayed care continues to represent an impediment



Base All respondents who have delayed healthcare in the past 12 months 2021 (1039), 2022 (803), 2023 (764)
QA2 Why have you delayed getting healthcare?
Data Selection frequency

Understanding consumer segments



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How our population segments

WELLNESS INFLUENCERS
16% OF THE POPULATION

These are the trendsetters; health seekers with the means and motivation to try new health approaches before they're mainstream. Wellness factors into every aspect of this influencer's daily life, and they're enthusiastic about explorations into the latest self-care trends (e.g., personal training, Eastern medicine, nutrition, and mental health). They can afford private health and wellness services for help, advice, and validation in their choices. They are open with sharing their journey and are typically the ones who others turn to for advice and recommendations on living a healthy lifestyle.

HABITUAL STRUGGLERS
16% OF THE POPULATION

Generally speaking, people don't think about their good health until they're faced with the possibility of losing it. Habitual Strugglers are faced with that possibility often. Their chronic conditions frequently find them in and out of doctors' offices, causing stress and overwhelm. They're not looking to be judged, regardless of how they got to this point; they want real help with navigating their healthcare so they can try to turn things around. They're motivated to break the cycle, but not without a lot of help and support. They know themselves well enough to admit that they can't succeed alone.

POSITIVE PREVENTIVES
11% OF THE POPULATION

Happy, sociable and in good health– Positive Preventives have an optimistic outlook on their health and on life in general. They also credit themselves completely for their good health, but the reality is they aren't quite as active or living as healthy a lifestyle as they lead others to believe. Where they do excel is their engagement with preventive care. They're proactive and organized about their recommended regimen of preventive care (e.g., annual wellness visits, skin exams and mammograms) and frequent their trusted healthcare provider to keep on top of their health, before it becomes an issue.

How our population segments

WHOLE-HEALTH MANAGERS

12% OF THE POPULATION

Can you be the master of your own care? If you're asking a Whole-Health Manager, then the answer is likely to be YES. Fiercely self-reliant and confident in their abilities to manage their health through the resources available to them online, they trust themselves before anyone else to keep their health on track. Whole-Health Managers hold off on traditional medicine in favor of self-care and holistic health management through clean eating, exercise and a variety of therapies and activities that keep their mind, body and spirit well. They are skeptical of traditional doctors and Rx-centric medicine and typically turn to them only as a last resort.

TRUSTING TRADITIONALISTS

12% OF THE POPULATION

Health and wellness may look different now than it did 30 years ago, but to a Trusting Traditionalist, not much has changed. They're the generation who grew up believing that their doctor is always right and if you get sick, you take medicine to get well. They're loyal to their doctor and prefer traditional approaches to care. They don't subscribe to alternative therapies, and they rarely feel the need to do health research on their own. If their doctor prescribes or recommends it, then that's a good enough endorsement for them.

UNAPOLOGETICALLY UNHEALTHY

12% OF THE POPULATION

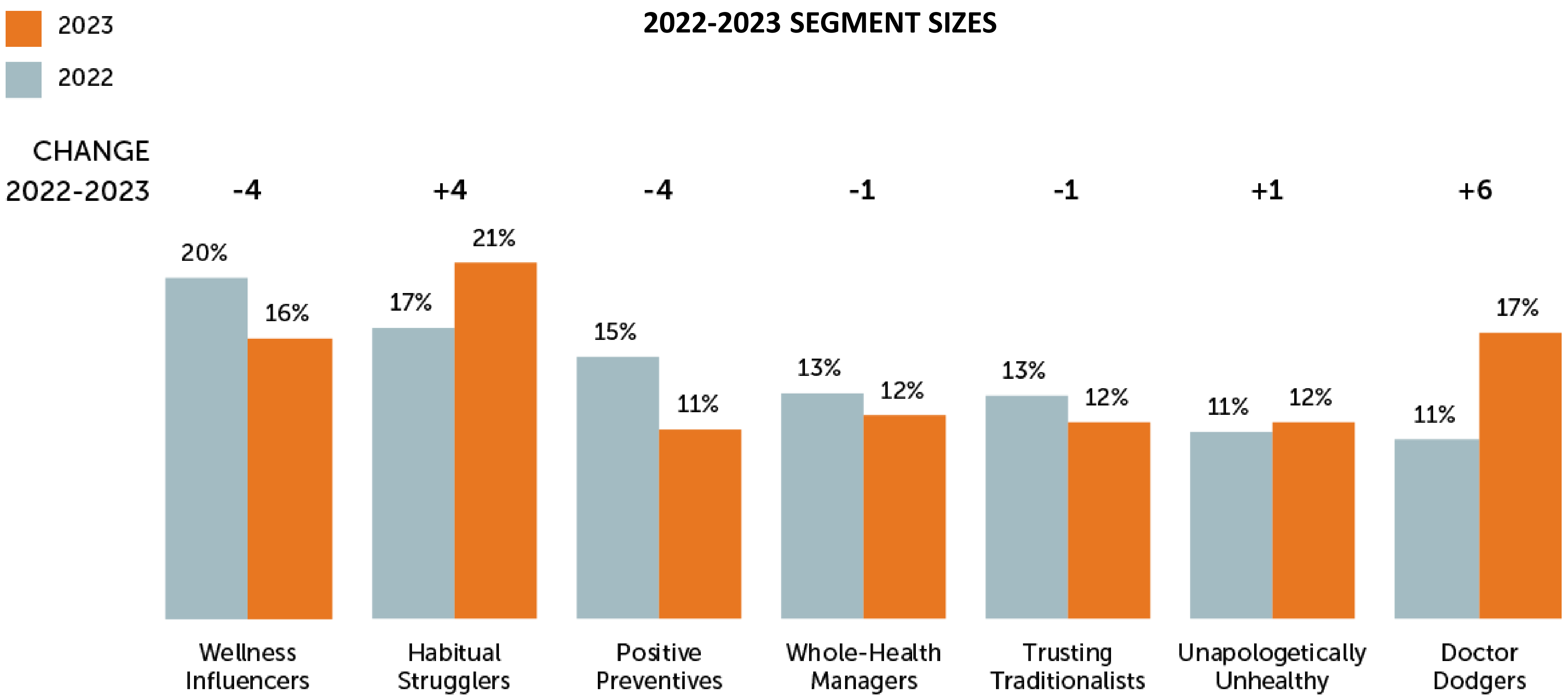
Leaving your health to chance might seem like a questionable strategy in 2023, but that's exactly what the Unapologetically Unhealthy have done their entire lives. And they're still here. Living their best life. Proving us health nerds wrong. These stubborn creatures of habit aren't likely to change their ways now–diet, exercise and preventive care are not words in their vocabulary. They'll begrudgingly agree to a doctor's visit in person every now and then if they are sick or need a bit of maintenance on that condition they regularly brush off. This live-fast, die-young segment didn't die. And they are laughing at us all.

DOCTOR DODGERS

17% OF THE POPULATION

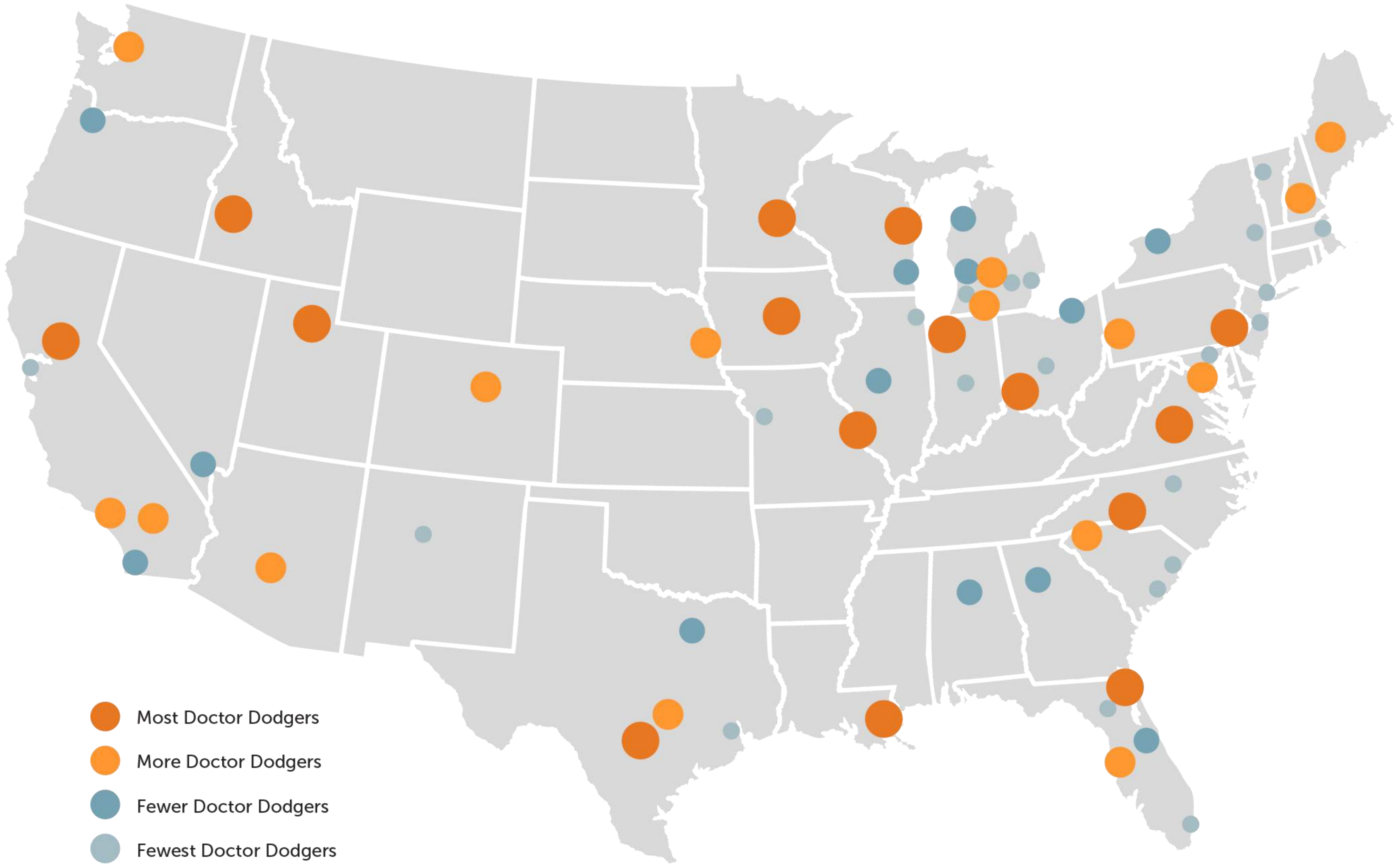
Doctor Dodgers aren't who you think they are. These young, blue-collar individuals tend to avoid the doctor not because they're apathetic about their health, but because the process of healthcare is so stressful, costly and time-consuming. For them, going to the doctor is a luxury that requires a level of organization and support that their busy lives–consumed with work and family–simply won't allow. They might lose income if they take time off from work to see the doctor. They don't have the time for paperwork. Their child needs their attention more than their health condition does. Any good intentions are likely to get derailed by circumstance. That's why they need empathy and compassion from health systems most of all, as well as a stress-free healthcare experience that gets them in and out quickly and at a low cost.

What’s happening to each of these segments year over year?



Base All U.S. nationally balanced respondents 2022 (1102), 2023 (3000)

Doctor Dodgers are everywhere



Virginia	21%
South Bend	20%
Charlotte	18%
Iowa	18%
New Orleans	18%
Sacramento	18%
Salt Lake City	18%
San Antonio	18%
St. Louis	18%
Boise	17%
Cincinnati	17%
Green Bay, WI	17%
Jacksonville	17%
Minneapolis	17%
Philadelphia	17%
Denver	16%
Greenville	16%
Orange High Desert	16%
Phoenix	16%
Tampa	16%
Austin	15%
DC	15%
Greater New Hampshire	15%
Lansing	15%
Los Angeles	15%
Maine	15%
Omaha	15%
Pittsburgh	15%
Seattle/Washington	15%
Sturgis, MI	15%

Atlanta	14%
Birmingham	14%
Cleveland	14%
Dallas	14%
Grand Rapids	14%
Illinois	14%
Las Vegas	14%
Milwaukee	14%
Orlando	14%
Portland	14%
Rochester	14%
San Diego	14%
Traverse City	14%
Baltimore	13%
Charleston	13%
Columbus	13%
Houston	13%
Kalamazoo	13%
Kansas City	13%
Myrtle Beach^	13%
New Jersey	13%
Albany	12%
Chicago	12%
Detroit	12%
New Haven	12%
New York	12%
Albuquerque	11%
Boston	11%
Indianapolis	11%
Miami	11%
San Francisco	11%
Ann Arbor	10%
Gainesville	10%
Raleigh Durham	8%

^Market formerly referred to as South Carolina

06

Staffing shortages: a consumer perspective

The workforce challenges we face are unprecedented, and consumers are noticing

Take a look at the national results. They're staggering:

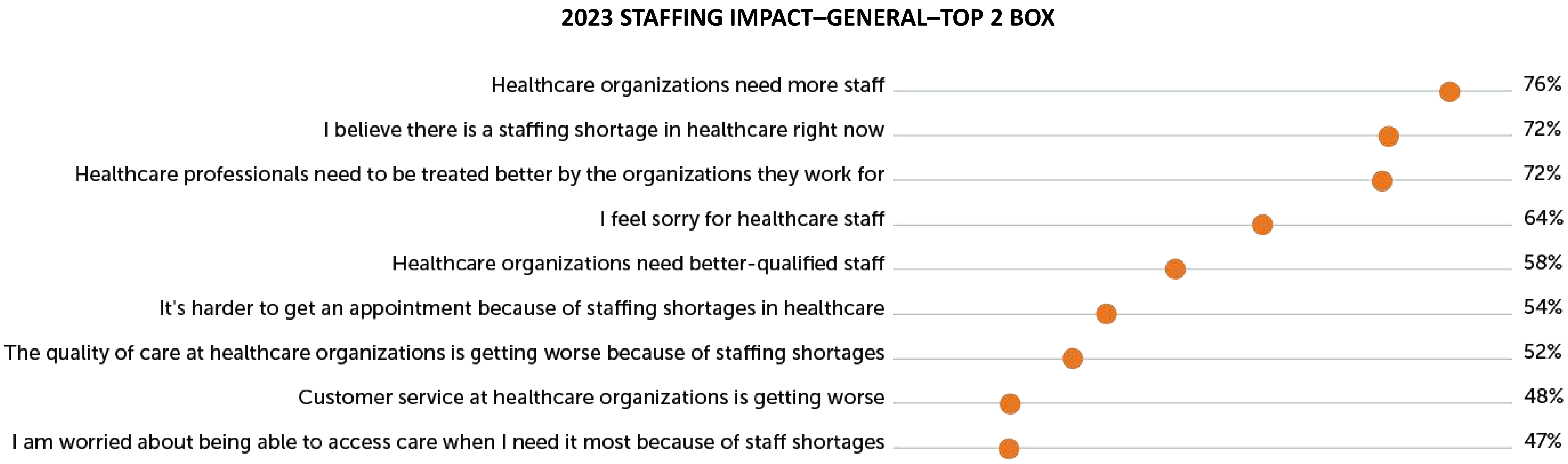
76%
of U.S. consumers believe that healthcare organizations need more staff

72%
of U.S. consumers think that there is a staffing shortage in healthcare right now

72%
of U.S. consumers think healthcare professionals need to be treated better by the organizations they work for (hey, healthcare leader—they're talking about you!)

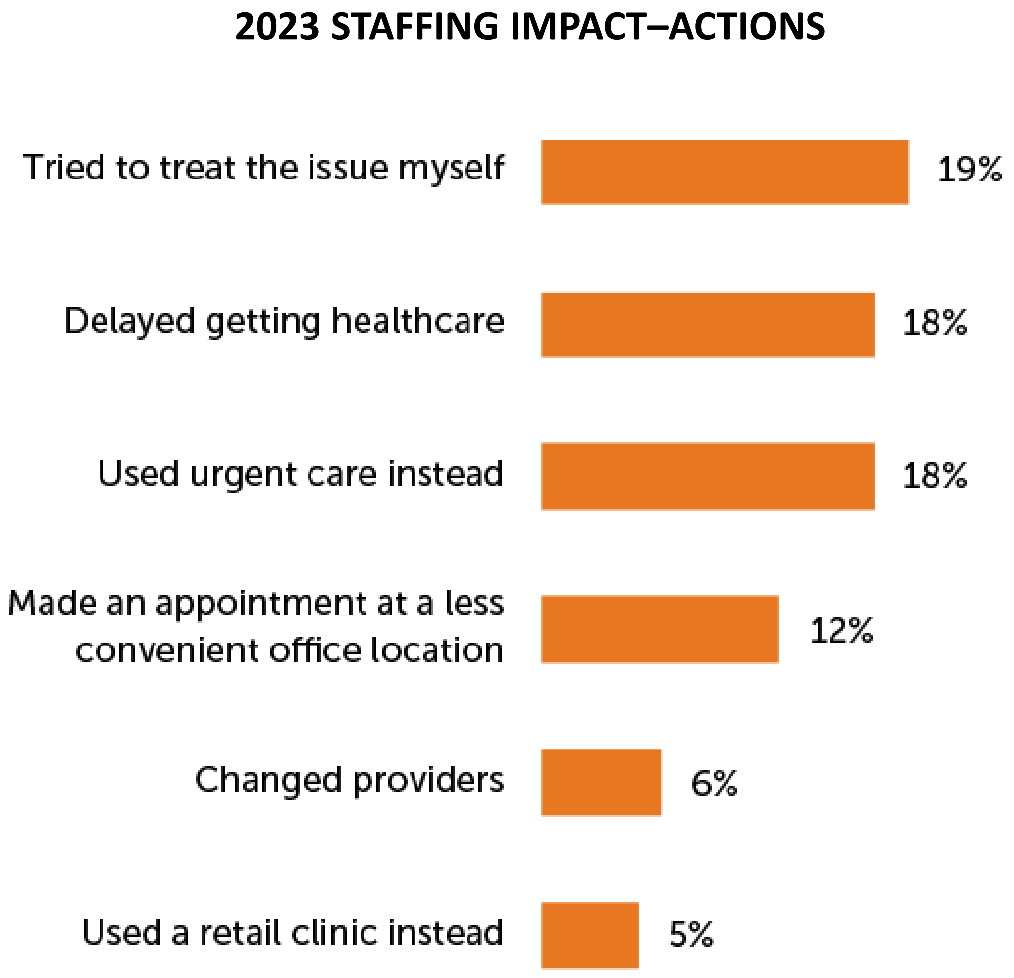
Base All U.S. nationally balanced respondents 2023 (3000)
QST1 How much do you agree or disagree with the following statements?
Data Top 2 Box Scores

Many consumers observe and experience workforce challenges



Base All U.S. nationally balanced respondents 2023 (3000)
QST1 How much do you agree or disagree with the following statements?
Data Top 2 Box Scores

Perceived staffing issues are causing behavior change



"Yes, whenever we want to make an appointment to see the doctor the appointment is always three months away. If it's something serious, we have to go to the emergency room to be treated."

- Female, 57, California

"In my area, we have a shortage of physicians, so it is very difficult to see specialists. I have thyroid problems and need surgery, and I've been working on this for a year."

- Male. 70, Arizona

"I was having trouble walking due to pain in my foot. I tried contacting my Primary Care physician, but couldn't even get through to his office. Finally, after many attempts, the office set up an appointment with a different doctor who ultimately referred me to someone who couldn't see me until the following week!"

- Male, 75, North Carolina

Base All U.S. nationally balanced respondents 2023 (3000)
QST2 In the past 12 months, which of the following have you done due to staffing shortages in healthcare?
Data Selection frequency

monigle

How can you help your organization to improve our staffing outlook?

1. **Map the culture of the organization** through research to understand what people want from the enterprise. Culture mapping enables better, more informed decisions by leaders as it demonstrates the culture of the organization as well as the potential gaps.

2. **Clearly define an employer brand or employee value proposition** that clarifies the relationship between organization and individual while demonstrating why people should work there as opposed to at an alternative.

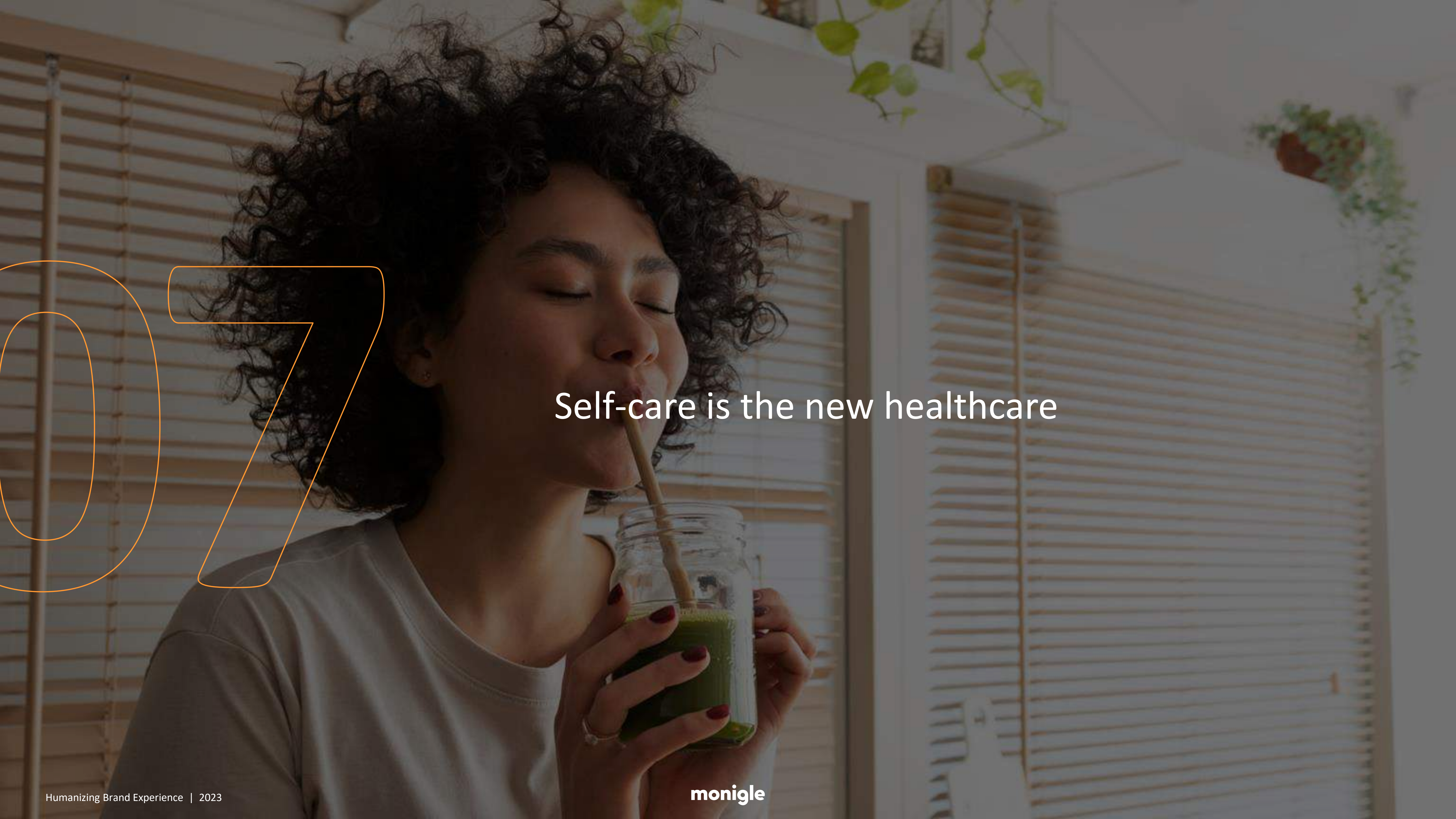
3. **Define the entire employee experience—**from recruitments, steps and onboarding to retention and growth. This is not just about what you want it to be but what you are actually doing and what's working versus what's not. Sometimes, you'll find steps in the process that are, at best, disconnected and, at worst, in stark conflict.

We may be able to learn from the brands effectively addressing consumer perspectives around staffing

TOP 10 HEALTHCARE BRANDS - STAFFING

Rank	Brand	
1	University of Miami Health System	71%
2	Mount Sinai Medical Center	69%
3	Emory Healthcare	69%
4	Baptist Health South Florida	69%
5	Valley Health System	68%
6	Cedars-Sinai	67%
7	Stanford Health Care	67%
8	UChicago Medicine	66%
9	OhioHealth	66%
10	Ochsner Health	66%

QB11 Lastly, based on what you know about [BRAND], in your opinion, how well do the following statements describe them? Always has enough staff to service my healthcare needs and the needs of the community.
Data Top 2 Box Score



07

Self-care is the new healthcare

People are seeking care they control and want to choose what is best for them

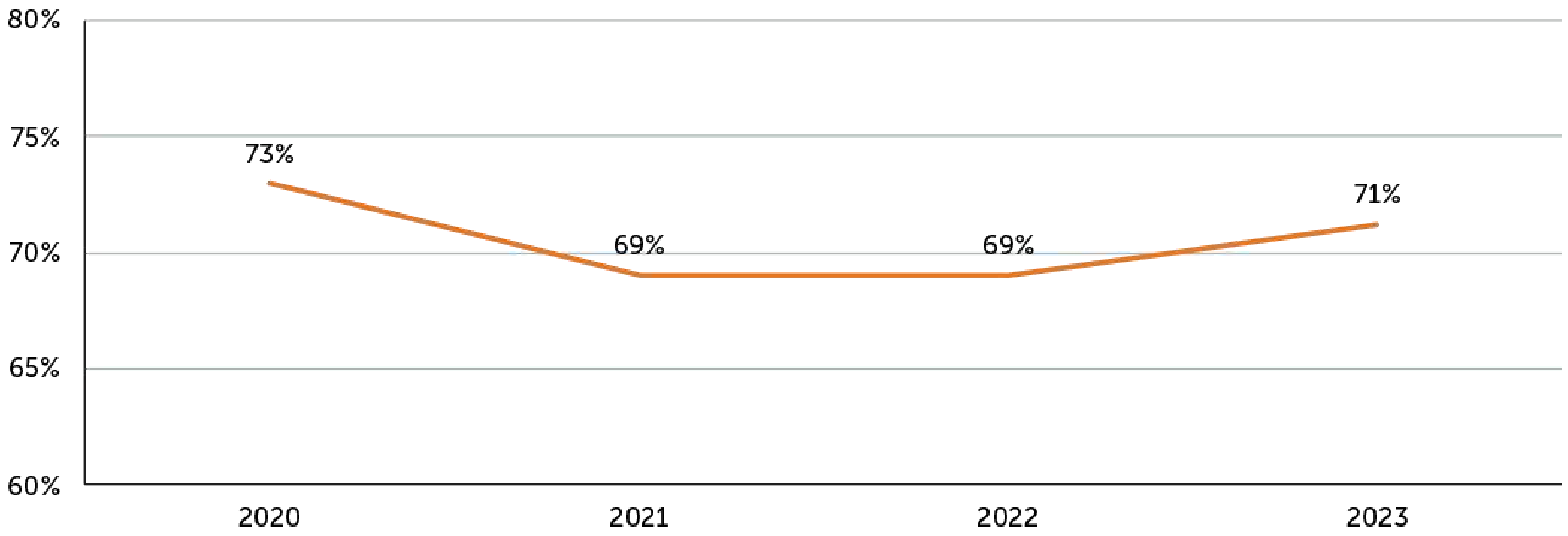
42%

of consumers across the country now claim to practice “self-care,” which means managing their own health, as well as self-diagnosing.

Continued increases in people doing their own work around symptoms and treatments should change the way we view the role of our brands

2020-2023 HEALTHCARE ENGAGEMENT–PROACTIVITY

"I often do my own research on my symptoms and/or treatments."



Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with the statement: I often do my own research on my symptoms and/or treatments.
Data Top 2 Box Score

Self-Care as a channel remains critical to consumer experiences

2023 CHANNEL USAGE

IN-PERSON CARE

At a doctor's office/hospital/medical facility.

SELF-CARE

When you do your own research online to self-diagnose and manage your health.

VIRTUAL CARE

Using online video, audio and instant messaging to connect remotely to a doctor/healthcare professional through your computer or mobile device.

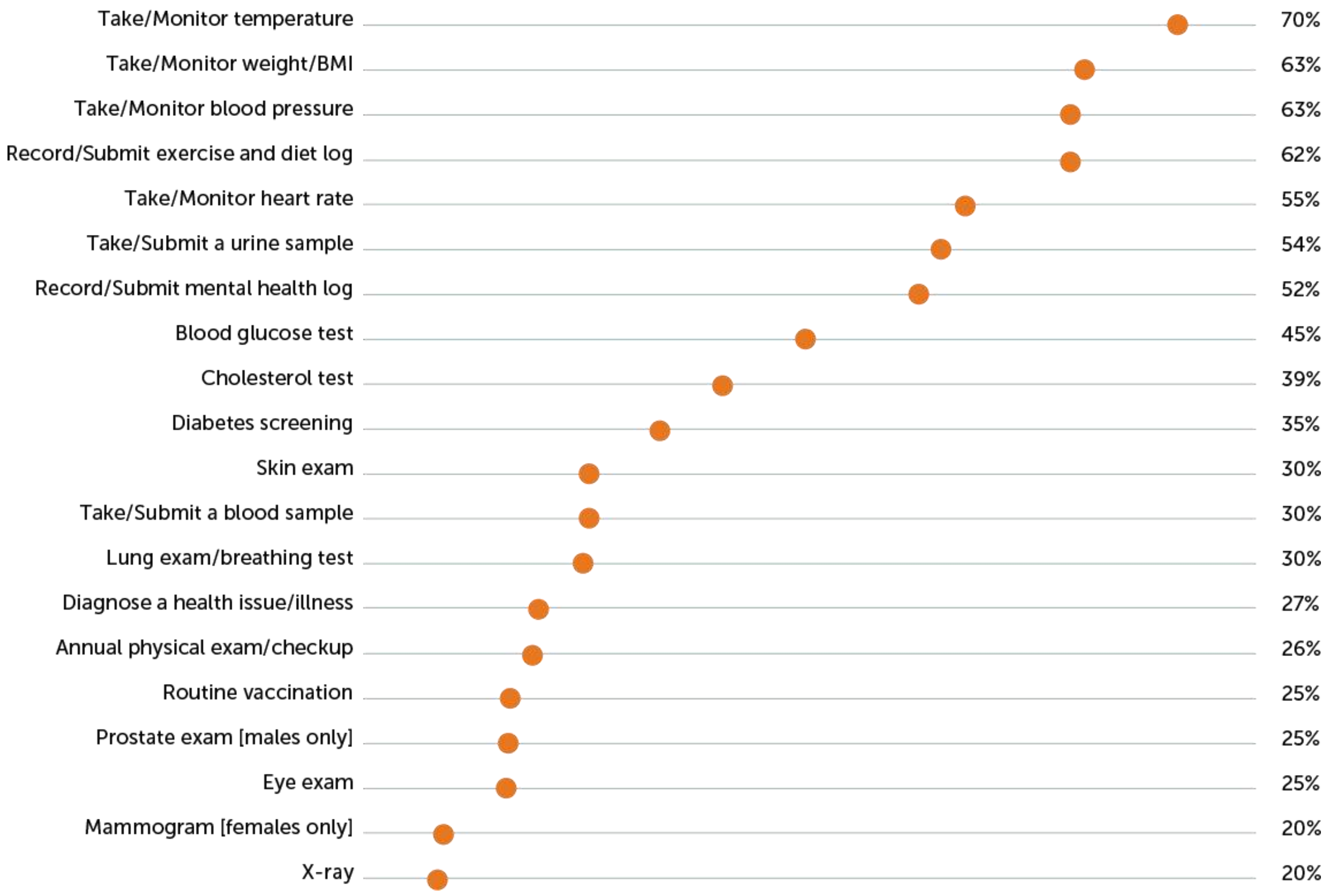
IN-HOME CARE

When a doctor/healthcare professional comes to your home.

Base All U.S. nationally balanced respondents 2023 (3000)
QSC1 In what ways do you manage your health and receive care?
Data Selection frequency

Consumers are willing to take on more and more

2023 PREFERENCE FOR POTENTIAL SELF-SERVE CARE TASKS–TOP 2 BOX



"Possibly an exercise plan, or a personalized eating plan. Maybe like a subscription box that came every month to give you journal prompts, exercise stuff, new recipes to try, an activity checklist for that specific month, stuff to help you get out of your head."
- Male, 30, Indiana

Base All U.S. nationally balanced respondents 2023 (3000), Females (1499), Males (1474)
QSC3 Below is a list of healthcare tasks that it might be possible in the future to do by yourself or "self-serve" without having to wait/pay to see a healthcare professional. For each healthcare task, please indicate how interested you would be in doing it yourself. Please assume that you would be provided with the necessary medical equipment and instructions/online resources for tasks you complete by yourself.
Data Top 2 Box Scores

The ChatGPT impact on self-care behaviors

How can I better manage my high blood pressure at home?

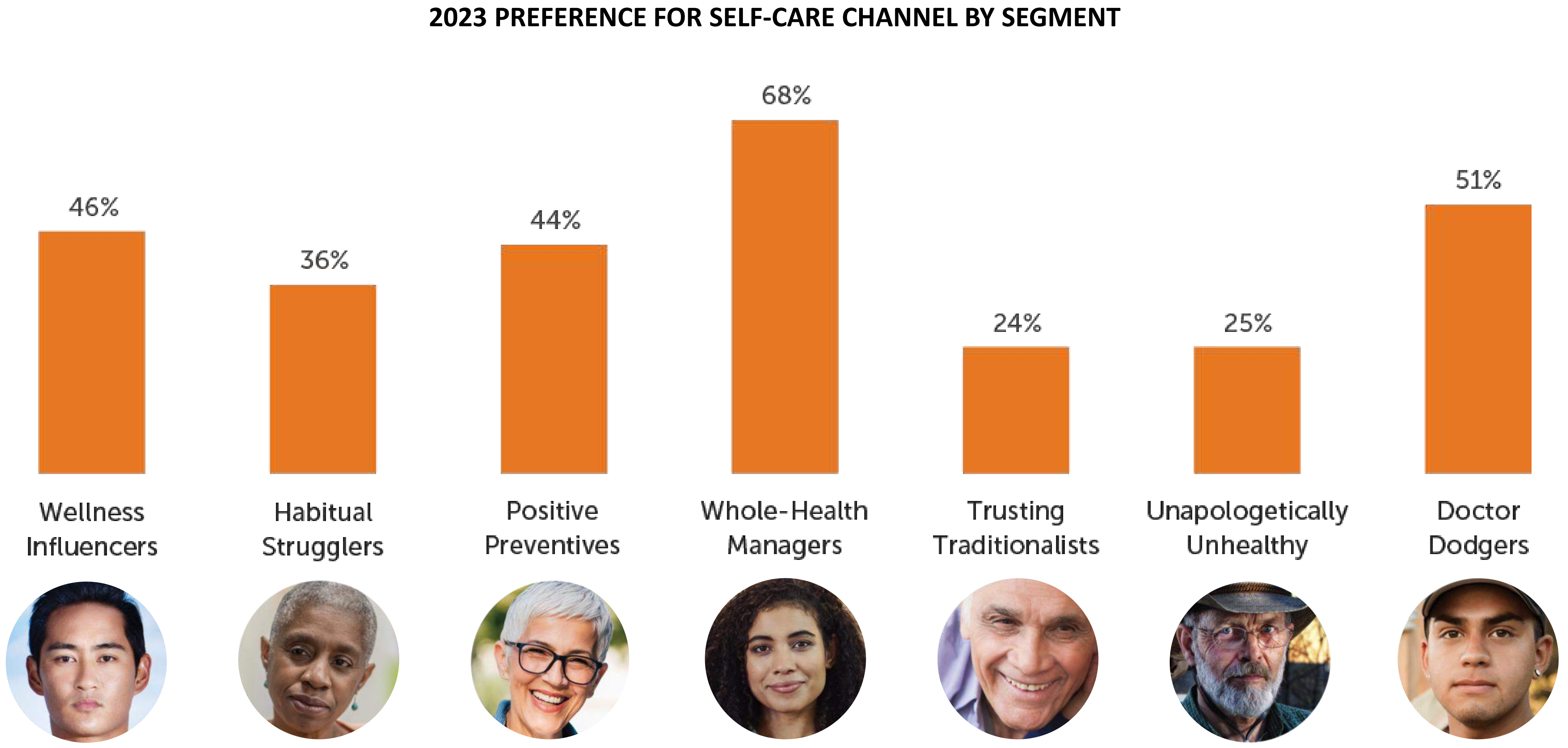
High blood pressure, also known as hypertension, is a common condition that affects many people. If left uncontrolled, it can increase your risk of heart attack, stroke and other serious health problems. Fortunately, there are several things you can do to manage your blood pressure at home. Here are some tips:

1. Monitor your blood pressure regularly: You can use a home blood pressure monitor to keep track of your readings. Make sure to follow the instructions carefully and take your measurements at the same time each day.
2. Maintain a healthy weight: Being overweight or obese can increase your blood pressure. If you are overweight, losing as little a 5% to 10% of your body weight can help lower your blood pressure.
3. Exercise regularly: Regular physical activity can help lower your blood pressure. Aim for at least 30 minutes of moderate-intensity exercise, such as brisk walking, most days of the week.
4. Eat a healthy diet: A diet that is rich in fruits, vegetables, whole grains and lean protein can help lower your blood pressure. Avoid foods that are high in saturated and trans fats, salt, and sugar.
5. Limit alcohol and quit smoking: Drinking too much alcohol and smoking can raise your blood pressure. If you drink alcohol, do so in moderation. If you smoke, quit.
6. Manage stress: Chronic stress can contribute to high blood pressure. Practice stress reducing techniques such as meditation, deep breathing, or yoga.
7. Take your medication as prescribed: If your doctor has prescribed medication to lower your blood pressure, be sure to take it as directed.

By making these lifestyle changes and monitoring your blood pressure regularly, you can better manage your high blood pressure at home. However, it is important to consult with your doctor to determine the best course of treatment for you.

Note: Single question posed to ChatGPT on February 27, 2023. The answer reflects no adjustment or refinement.

Not all segments value self-care in the same way



Base All U.S. nationally balanced respondents 2023 Wellness Influencers (492), Habitual Strugglers (625), Positive Preventives (331), Whole-Health Managers (357), Trusting Traditionalists (346), Unapologetically Unhealthy (347), Doctor Dodgers (502)
QSC1 In what ways do you manage your health and receive care?
Data Selection frequency

08

Evolving the language of healthcare

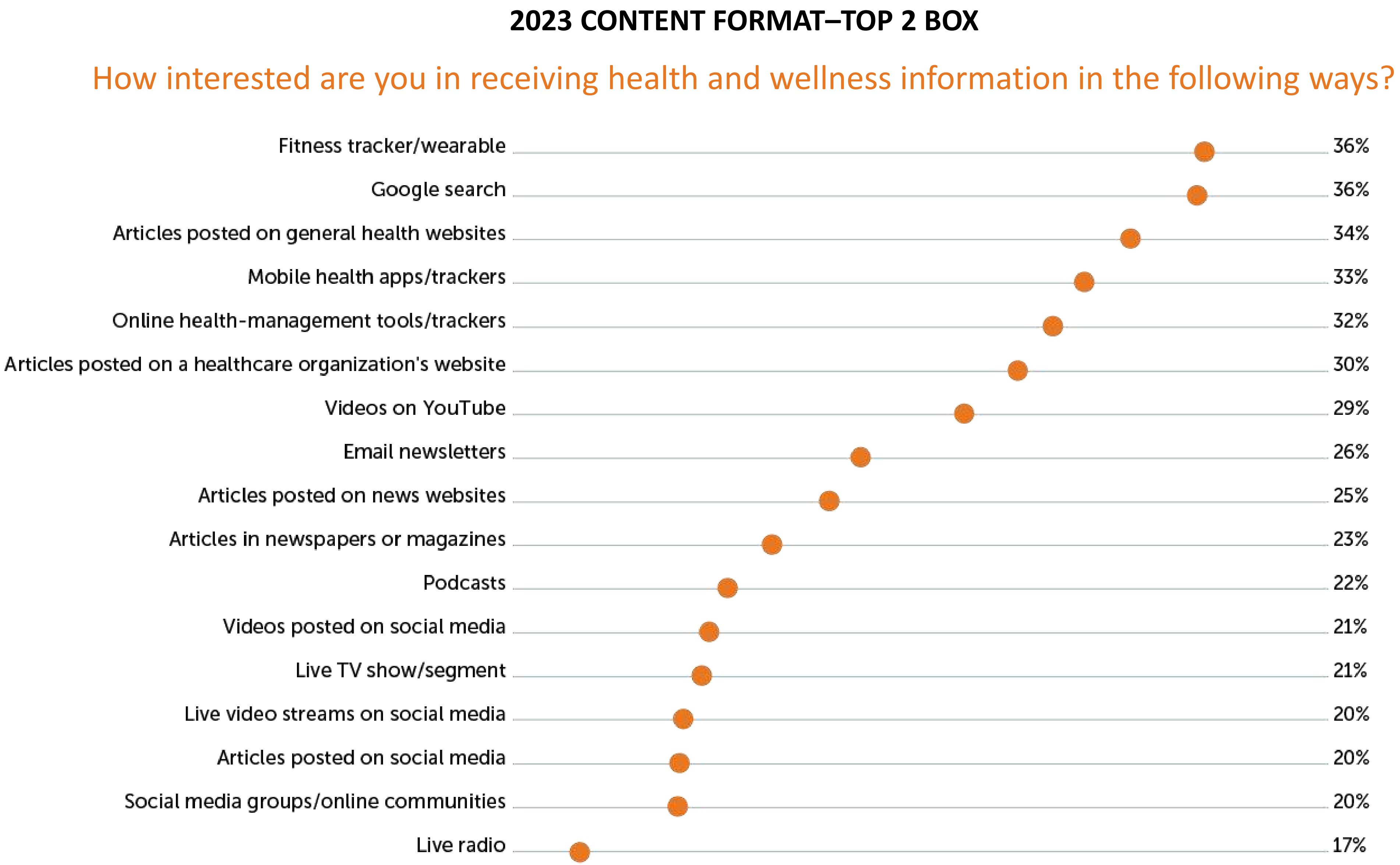
Consumers continue to seek variety in the types of content they consume related to health, care and wellness…

2023 CONTENT TYPE–TOP 2 BOX

How appealing to you are the following health and wellness resources?

Base All U.S. nationally balanced respondents 2023 (3000)
QCO2 How appealing to you are the following health and wellness resources?
Data Top 2 Box Scores

…while channel variety remains high



Base All U.S. nationally balanced respondents 2023 (3000)
QCO1 How interested are you in receiving health and wellness information in the following ways?
Data Top 2 Box Scores

You can always take a fresh view of your approach to content

Lessons in content and control from Virtua Health

– By Chrisie Scott, Senior Vice President and Chief Marketing Officer, Virtua Health, and Ryan Younger, Vice President of Marketing, Virtua Health

Know who you are and be relentless about it

Whatever your brand positioning is, whatever that aspirational space you've discovered as the most credible, most believable and most authentic expression of who you are, own it and use it rigorously as the bar you must cross for every piece of content you put out into the world.

Be open to the freedom of where communication will take you

Once you've freed yourself from old ideas and restraints over what you think content should sound like, you'll pass that freedom and control on to your consumer, who becomes empowered to choose for real, meaningful reasons. Consumers are always searching for something, and it's not always just transactional. But being there at the ready, to provide them with valuable information that empowers them in their own health journey, builds the kind of trust that keeps you high in the consideration set for when they do need Virtua Health for medical care.

Apply your brand everywhere

Every point in a consumer's experience with us is another chance to connect. We often think about content in terms of social, web and publications. But content is pervasive. It's how you respond to online reviews. It's your physicians participating in drive-time radio shows. It's your hold messages. It's your voice and the language you choose for the wayfinding signage inside your facilities. It's what's on screen before a patient enters a virtual visit. It's the sign-in sheet in your reception area. It's a healthy recipe or real-talk Zoom meetings during a pandemic. It's big moments, but also little moments. It's all content, and it all matters. The question for each of us as leaders is whether we have the appetite and the discipline to influence such a sprawling ecosystem.

How can our content be there for consumers when the time comes?

- ☑ **Real talk in real time:** We all know consumers are bombarded with more messaging than ever. The value we provide with relevant and relatable content that matters in the moment will break through and be remembered. Know the journey of your desired audience, and focus on intersecting with it.
- ☑ **One size doesn't fit all:** We live in a channel- nuanced world. While its essence can thread throughout, content is meant to show up in different ways in different places. You have to be flexible and see your content as a starting point that shifts, changes and is reshaped (and redeployed) over time.
- ☑ **Social media complexity:** Consumers tend not to seek out transactional care on social channels. And if COVID taught us anything, not every channel is appropriate for every piece of content. Be mindful of your audience and how you show up on their feeds. It might not be the right place for you every time. But for us, using social as a complementary, more emotional way to enrich a story works well.
- ☑ **Not every piece of content needs to be actionable:** Shift your thinking (and that of your organization) from "what I want you to do" to "how I want you to feel" as a consumer. This gives us permission to show up and be present in consumers' lives in meaningful ways. It's freeing in a way to realize that not every message is intended to independently drive a metric.
- ☑ **Show who's doing the caring.** There's more to our physicians than diplomas. We're using technology and digital tools as an enhanced platform for providers to tell their personal stories and connect with consumers, human to human. In addition, we're bringing our physicians out of the hospital to provide edutainment—educational but lighthearted content—on radio shows and in our communities as real people and ambassadors for our brand.
- ☑ **Have empathy, spread equity:** How can we help? It's so important to be of service in a sea of sameness. Consumers want to be understood, and they are looking for partners in their health, not superiors. It's also incumbent on all of us to make sure that the content we share is inclusive of everyone. Healthcare is a right, not a privilege and it's our responsibility to connect to everyone who needs us, no matter where they are.
- ☑ **Time is our friend and our enemy:** Ultimately, we want consumers to see our doctors at some point, but that might not be the starting point. And that's OK. Because we're building trust. So, when the time comes to make an appointment to schedule care or a procedure, the groundwork is there.

There is a level of variability in content type preferences across segments

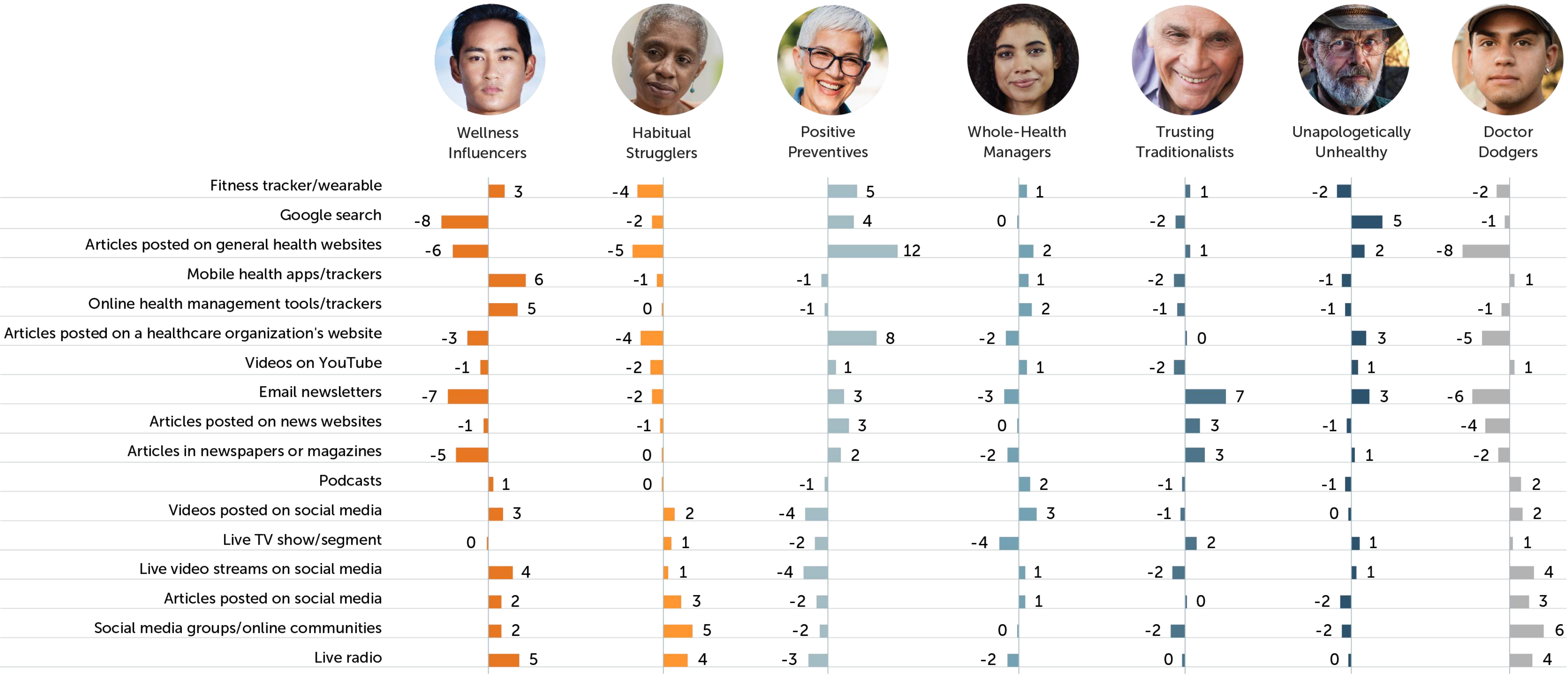
2023 CONTENT TYPE–EXPECTANCY ANALYSIS BY SEGMENT

	Wellness Influencers	Habitual Strugglers	Positive Preventives	Whole-Health Managers	Trusting Traditionalists	Unapologetically Unhealthy	Doctor Dodgers
Nutritional advice and healthy food recipes/resources	1	-2	1	5	1	-2	-3
Health checklists based on age and gender	-1	0	2	-3	3	0	-1
Self-care tools and resources online to better manage your health without seeing a professional	-1	-4	3	1	-2	0	4
Fitness and exercise programs/resources	3	-3	1	5	1	-2	-3
Someone I can relate to talking about health management and giving recommendations	0	0	0	-6	1	2	2
Holistic health advice and wellness information that prioritizes staying well	-1	-1	1	12	-4	-3	-1
A tracking tool that monitors your health and suggests lifestyle changes based on data	1	2	1	0	-1	-1	-1
Live Q&A with a healthcare professional	-2	2	-3	-6	1	4	2
In-depth articles with advice about specific health issues written by healthcare professionals	-1	1	2	-3	2	0	-1
Information on clinical trials and research	-2	4	-3	-3	0	1	1
Short on-demand videos you can watch anytime containing health advice	2	-1	-2	-1	0	0	2
Real patient stories and advice from people who live with specific illnesses/conditions	-3	2	-3	4	-1	0	3
General healthcare news and regular updates on topics of interest that you can subscribe to	3	1	2	-2	0	0	-3

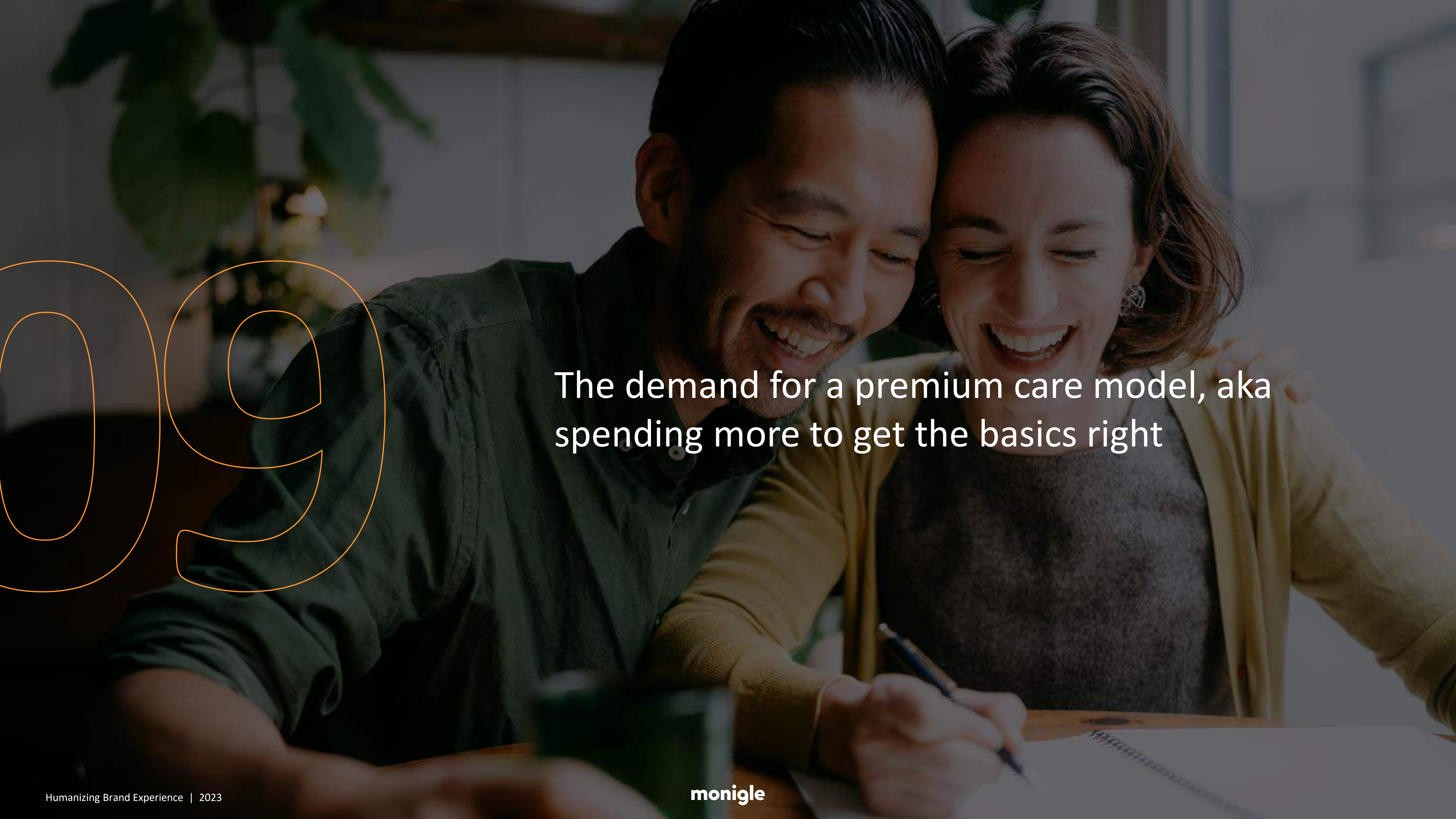
Base All U.S. nationally balanced respondents 2023 Wellness Influencers (492), Habitual Strugglers (625), Positive Preventives (331), Whole-Health Managers (357), Trusting Traditionalists (346), Unapologetically Unhealthy (347), Doctor Dodgers (502)
QCO2 How appealing to you are the following health and wellness resources?
Data Expectancy score based on Top 2 Box

Depending on your target segments, your channels should also shift

2023 CONTENT FORMAT–EXPECTANCY ANALYSIS BY SEGMENT



Base All U.S. nationally balanced respondents 2023 Wellness Influencers (492), Habitual Strugglers (625), Positive Preventives (331), Whole-Health Managers (357), Trusting Traditionalists (346), Unapologetically Unhealthy (347), Doctor Dodgers (502)
QCO1 How interested are you in receiving health and wellness information in the following ways?
Data Expectancy score based on Top 2 Box



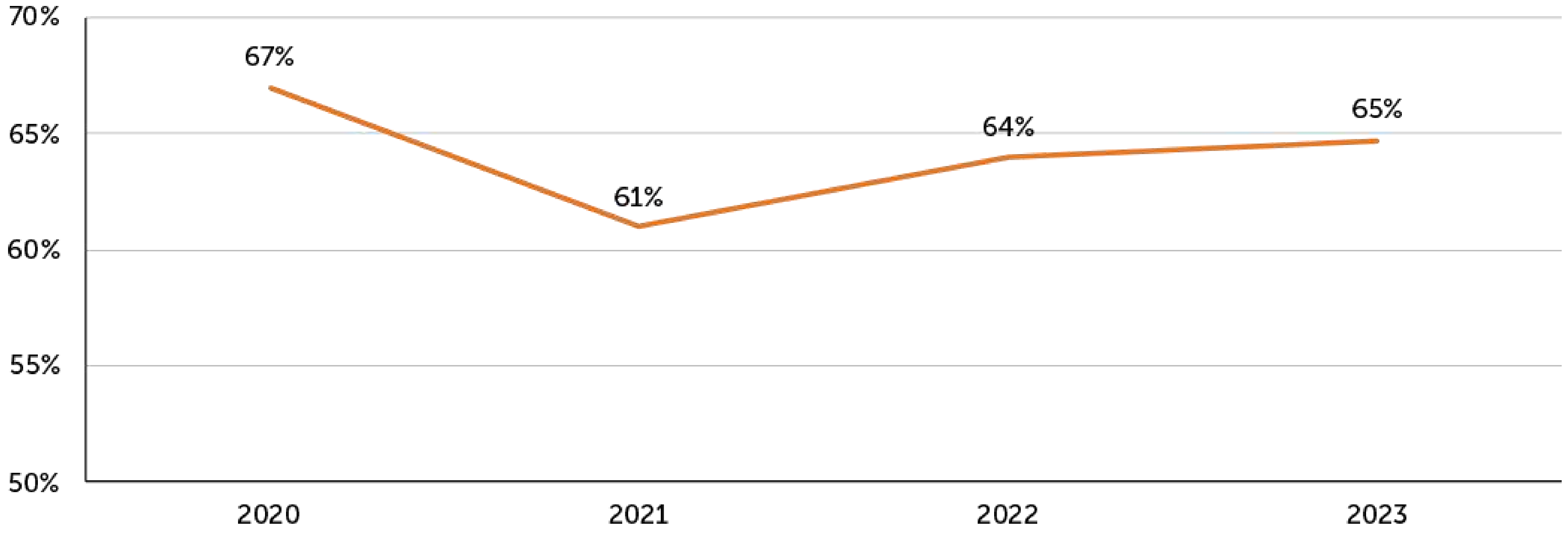
09

The demand for a premium care model, aka spending more to get the basics right

We see steady growth in peoples' willingness to spend more for the best healthcare provider or facility

2020-2023 HEALTHCARE ENGAGEMENT–SYMBOLIC (FINANCIAL) VALUE

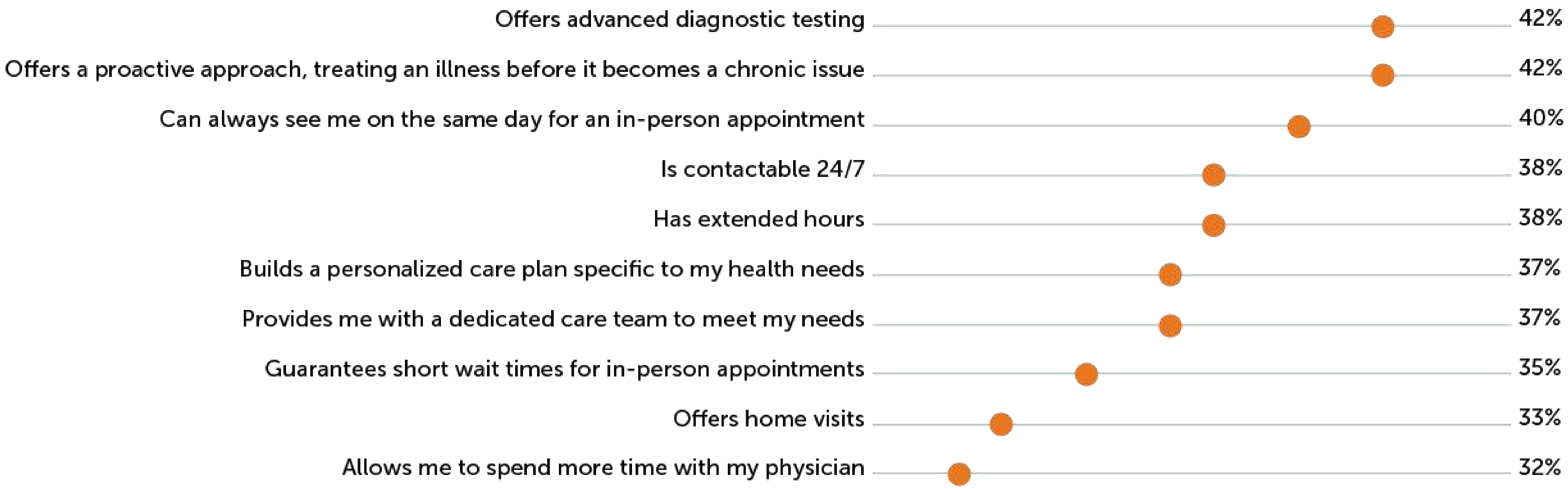
"I think it is worth the extra cost to go to the best healthcare provider or facility."



Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with the statement: I think it is worth the extra cost to go to the best healthcare provider or facility.
Data Top 2 Box Score

When we unpack the specifics, there are clearly places where consumers would invest their hard-earned dollars

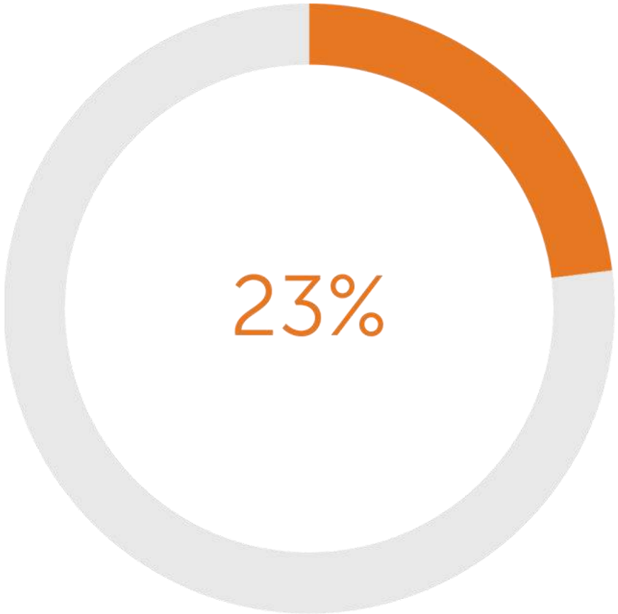
2023 WILLINGNESS TO SPEND MORE–TOP 2 BOX



Base All U.S. nationally balanced respondents 2023 (3000)
QP2 How willing are you to pay more to receive the following benefits from a healthcare organization?
Data Top 2 Box Scores

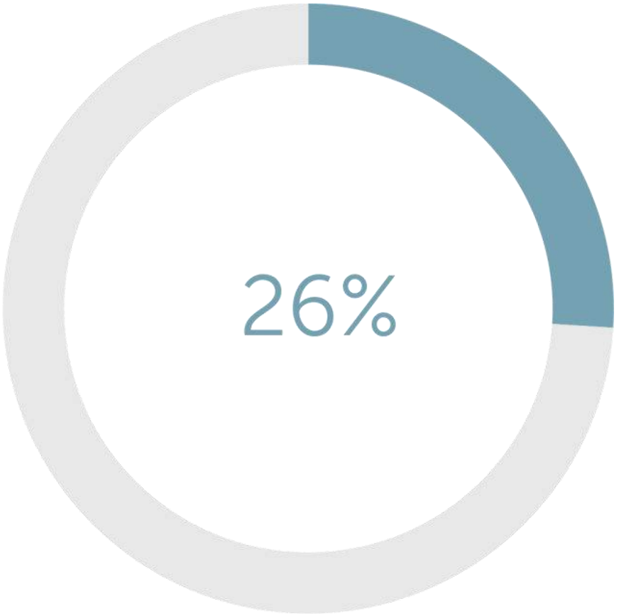
So why haven't some of these bundled offerings taken off?

2023 PREMIUM HEALTHCARE MODELS



CONCIERGE MEDICINE

A premium primary care service that provides personalized care, typically with no wait times and 24/7 access to your primary care doctor for a monthly membership fee or retainer (supplementary to your health insurance).

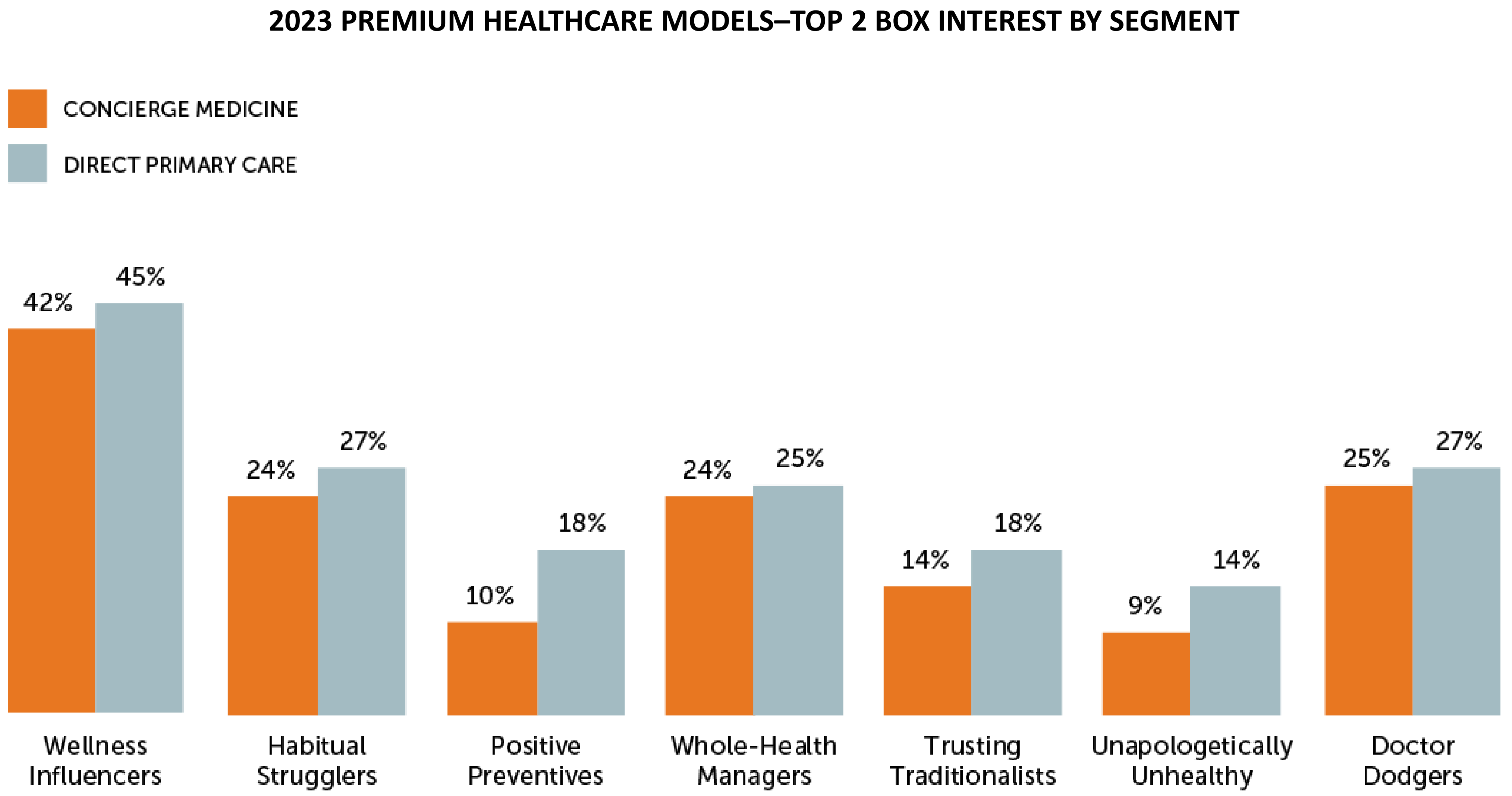


DIRECT PRIMARY CARE

Allows people to pay directly for primary care (with either fixed monthly fees or an annual one-time fee) without the complexity of maintaining relationships with insurers. You still require insurance for other services.

Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with the statement: I think it is worth the extra cost to go to the best healthcare provider or facility.
Data Top 2 Box Score

So why haven't some of these bundled offerings taken off?



Base All U.S. nationally balanced respondents 2023 Wellness Influencers (492), Habitual Strugglers (625), Positive Preventives (331), Whole-Health Managers (357), Trusting Traditionalists (346), Unapologetically Unhealthy (347), Doctor Dodgers (502)
QP1 How interested or uninterested are you in using each of the following healthcare service models?
Data Top 2 Box Scores

Paying for better can be a risky bet

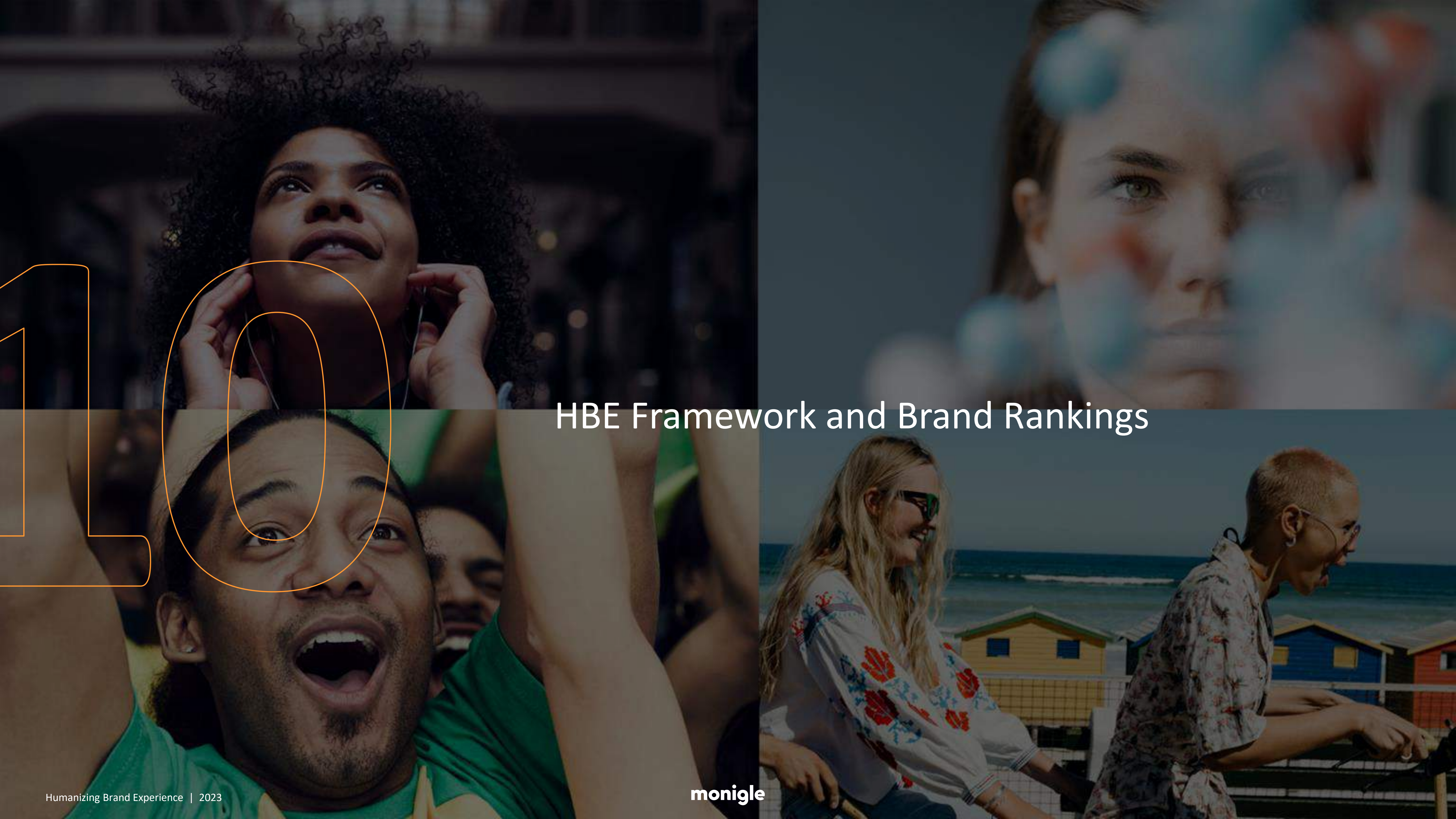
Why people are interested in paying a bit more

"Yes, I would be willing to pay more for this service. One barrier to receiving healthcare for me is fitting it into my schedule or having to take up a lot of time to see a doctor because of wait times. If I knew I was able to see a doctor quickly and on my schedule, I think I would be more likely to visit."
- Male, 29, Tennessee

Why people are uninterested in paying a bit more

"No, I would not use this. I do not think that just because you have money you are entitled to premium healthcare. Healthcare should be the same for everyone."
- Female, 54, New Mexico

monigle



10

HBE Framework and Brand Rankings

We evaluate brands in the study using our proprietary framework.

Humanizing Brand Experience is built for today's brand leaders and guides our research practice in healthcare and beyond. As we work with our clients to understand and improve all types of physical, digital and interpersonal experiences across their organizations, we apply the learnings that emerge from this approach. The work is based on the latest academic thinking overlayed on 50+ years of brand, culture and experience work with our clients.

Ultimately, this model is built to move people, enable change and grow business over time.

At the heart of the framework is a structural equation model that has been validated and proven to drive brand choice and advocacy. The published brand rankings are based on the composite score from this model, weighted by market to reflect varying levels of category engagement.

A note on this year's model

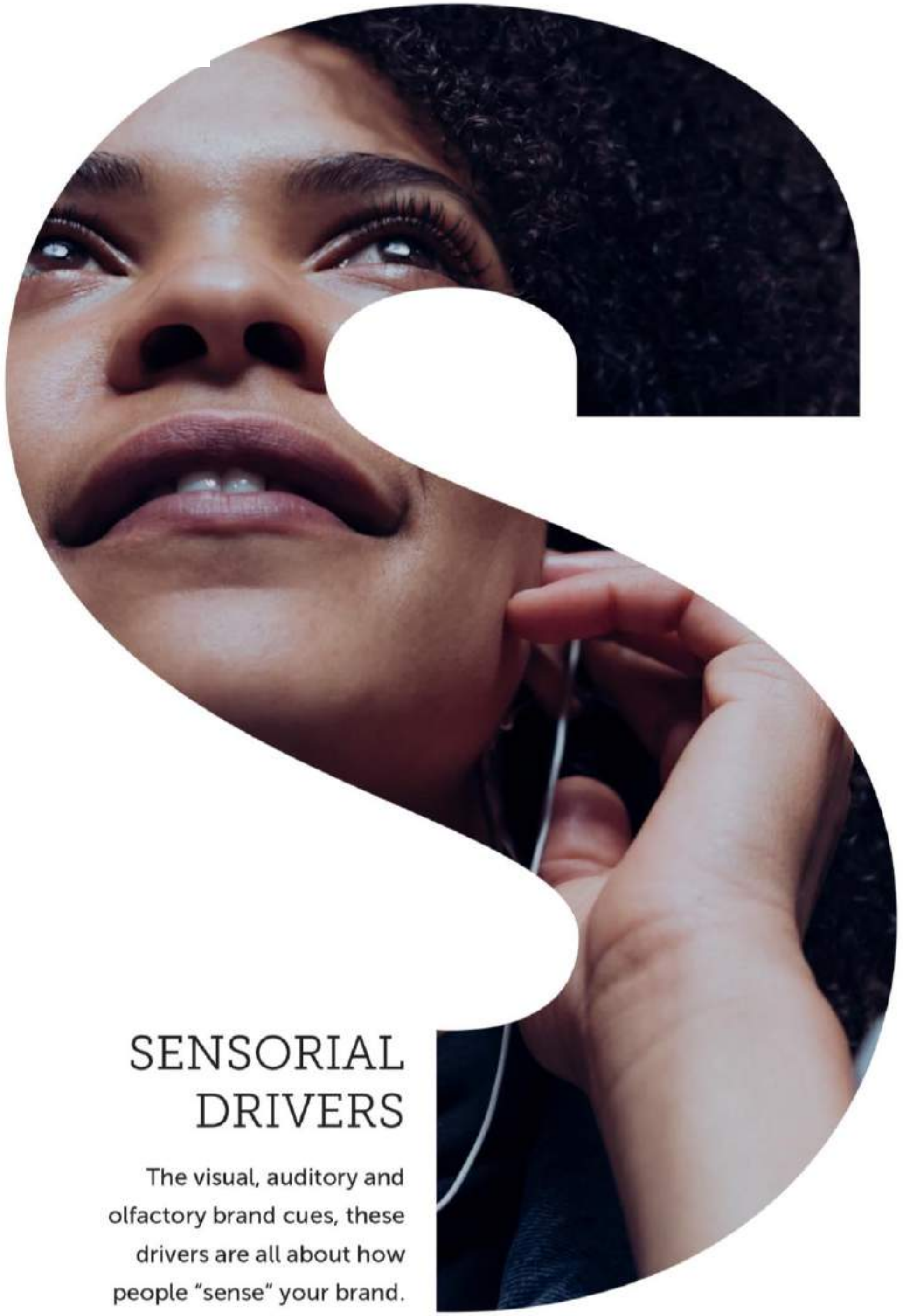
This year, we continued our ongoing evaluation of the attributes that are top of mind for consumers.

As you will see in the results on the following pages, there is little movement among the attributes at the top.

No additional changes were made to the model this year, and we maintained our four areas of focus as well as the structural equation model (SEM) approach, which **predicts 74% of the variance in consumer behavior** (advocacy + intent).

Brand scores are weighted by market using the Healthcare Engagement Index, which measures how central health and wellness are to consumers' lives.

Consistent with last year's design, we applied a Weighted Moving Average (WMA) to the composite score. This WMA accounts for both past performance (2021–2022) and 2023 performance and is weighted to assign more value to recency.



SENSORIAL DRIVERS

The visual, auditory and olfactory brand cues, these drivers are all about how people "sense" your brand.

IMPORTANCE	2020 DERIVED IMPORTANCE RANK	2021 DERIVED IMPORTANCE RANK	2022 DERIVED IMPORTANCE RANK	2023 DERIVED IMPORTANCE RANK
BUZZ People I am close to say positive things about them	1	1	1	1
ENVIRONMENT Has environments and physical spaces that appeal to me	2	2	2	2
HERD BEHAVIOR I see others I am close to using their services	4	3	3	3
AESTHETICS Is visually pleasing to look at	5	4	4	4
ATTRACTION Appeals to my senses	3	5	5	5
IMPRESSION Makes a strong impression on my senses	8	6	6	6
INTRIGUE I find the brand interesting in a sensory way	7	7	7	7
VOLUME I see and hear a lot about this brand	13	8	9	8
SOUNDS I associate positive sounds/music with them	6	9	8	9
SMELLS I associate pleasant smells/scents with them	9	10	10	10
OWNED I often see their brand's logo on buildings, signs, vehicles, uniforms,	11	11	11	11
PREVALENCE I sense the brand all around me	10	12	12	12
VISIBILITY I see this brand everywhere	12	13	13	13
PAID I often see advertising from them	15	14	14	14
EARNED I often see them on social media and in the news	14	15	15	15

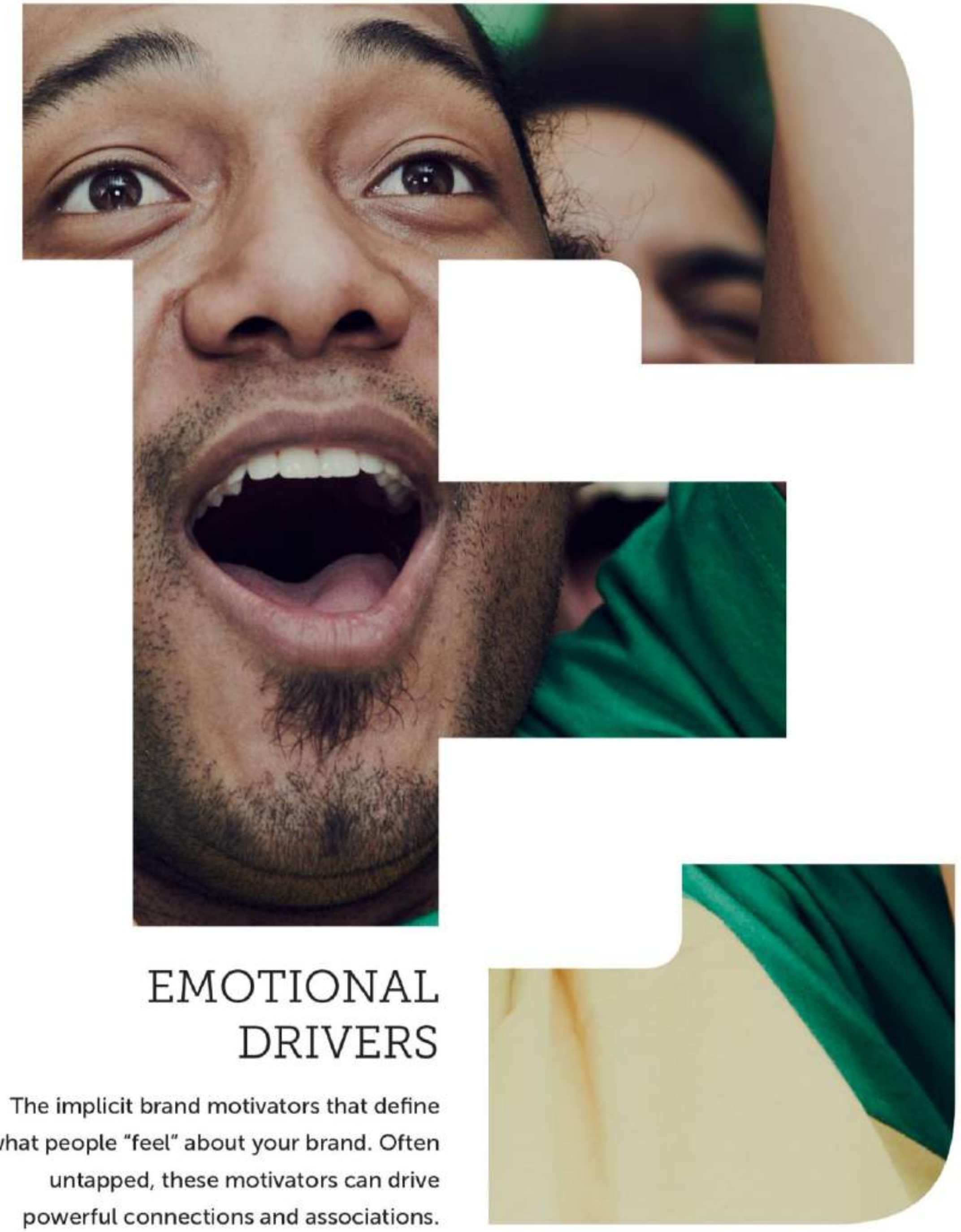
Derived importance score and rank based on Shapley Value Regression

INTELLECTUAL DRIVERS

The functional, bread-and-butter benefits offered by your brand. It's what people "think" about your brand when they go through their mental decision-making checklists.

IMPORTANCE	2020 DERIVED IMPORTANCE RANK	2021 DERIVED IMPORTANCE RANK	2022 DERIVED IMPORTANCE RANK	2023 DERIVED IMPORTANCE RANK
BEST PEOPLE Has the best people	1	1	1	1
QUALITY OUTCOMES Provides the best medical outcomes for patients	2	3	3	2
EMPATHY Demonstrates empathy and compassion in every aspect of patient care	4	4	4	3
CONVENIENCE & EASE Makes it quick and easy to get the care patients need	3	2	2	4
TRANSPARENCY Sets clear expectations with patients about what's happening and what's next	6	6	5	5
PERSONALIZATION Provides individualized care specific to a patient's unique needs	7	5	6	6
COORDINATION Helps patients navigate care across facilities and physicians	5	7	7	7
INNOVATION Offers the latest medical treatments and technologies	8	8	8	8
SYSTEMNESS A system where doctors, hospitals and clinics are all part of the same organization	10	10	10	9
WELLNESS Offers wellness programs and preventive care	9	9	9	10
ACADEMIC MEDICINE Conducts medical research and clinical trials	11	11	11	11

Derived importance score and rank based on Shapley Value Regression



EMOTIONAL DRIVERS

The implicit brand motivators that define what people "feel" about your brand. Often untapped, these motivators can drive powerful connections and associations.

IMPORTANCE	2020 DERIVED IMPORTANCE RANK	2021 DERIVED IMPORTANCE RANK	2022 DERIVED IMPORTANCE RANK	2023 DERIVED IMPORTANCE RANK
SECURITY Gives me reassurance that they will be there for me when I need them	1	1	1	1
FREEDOM Makes me feel like I have options when it comes to my healthcare	3	2	2	2
INDIVIDUALIZATION Makes me feel like the top priority when I'm getting care	5	4	4	3
CONFIDENCE Gives me confidence in my long-term health and wellness	2	3	3	4
SUCCESS Helps me live a good quality of life	6	6	6	5
WELLBEING Gives me a stress-free healthcare experience	4	5	5	6
SELF-ACTUALIZATION Helps and encourages me to be the healthy person I want to be	7	7	7	7
BELONGING Makes me feel like I'm not the only one going through this	8	8	8	8
EXCITEMENT Celebrates my important milestones and outcomes	9	9	9	9

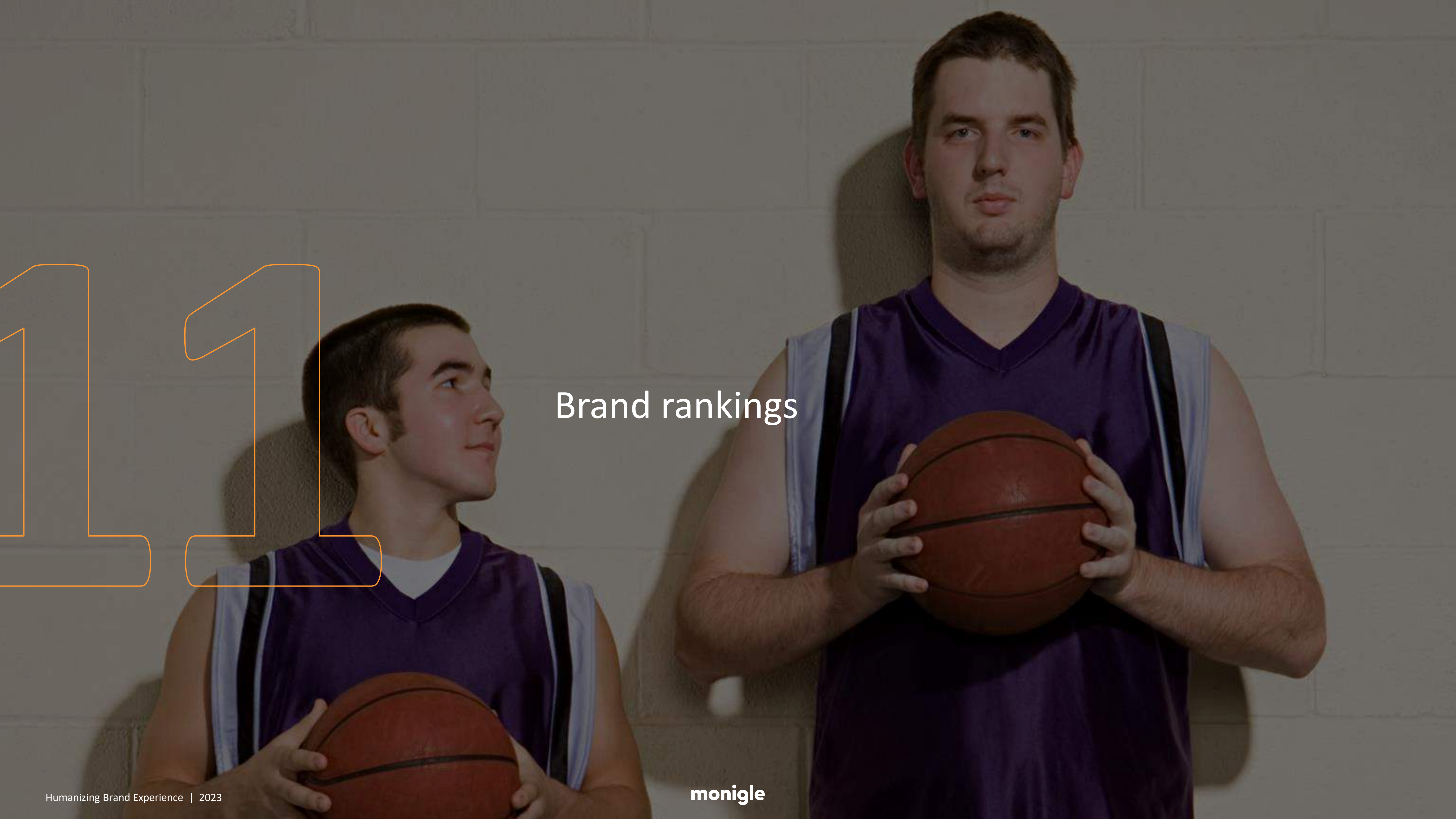
Derived importance score and rank based on Shapley Value Regression

BEHAVIORAL DRIVERS

These physical, intentional brand interactions are what people “do” with your brand. It’s where the rubber meets the road and where engaging, two-way experiences really happen.

IMPORTANCE	2020 DERIVED IMPORTANCE	2021 DERIVED IMPORTANCE	2022 DERIVED IMPORTANCE	2023 DERIVED IMPORTANCE
INTERACTIVITY My interactions with them are always positive	2	1	1	1
ENHANCEMENT Makes my life better	1	2	2	2
STRESS-FREE Makes hospital/doctor visits less stressful	4	3	3	3
NAVIGATION Makes it easy to get the information I need	5	5	5	4
CONTACTABILITY Makes it easy for me to contact them	7	4	4	5
TRANSFORMATION Changes my health behaviors in a positive way	3	7	7	6
DYNAMISM Is action-oriented	9	8	8	7
AVAILABILITY Makes it easy to get an appointment	11	6	6	8
SUBSCRIPTION I would happily sign up to receive email newsletters/updates	10	9	9	9
DIGITAL TOOLS Has really good digital tools	18	10	12	10
CONTINUITY I enjoy interacting with them on a regular basis	8	13	11	11
DISTINCTION Offers experiences that no other health organization does	16	14	16	12
WEBSITE Has a really good website	19	11	10	13
VIRTUAL CARE Offers really good virtual care/telehealth options*	*	*	13	14
PARTICIPATION I like to stay involved with them even when I'm healthy	12	15	14	15
ATTENDANCE I would happily attend events and activities organized	6	12	15	16
PATRONAGE I would happily donate my time or money to	13	16	18	17
EXERTION I go out of my way to interact with them	14	18	17	18
FOLLOW I would happily follow them on social media	15	17	19	19
STIMULATION Offers experiences that get me excited	17	19	20	20

Derived importance score and rank based on Shapley Value Regression
*Attribute not included 2020–2021



11

Brand rankings

2023 Humanizing Brand Experience Rankings

The published rankings here are based entirely on consumer opinion and are driven by the composite score from the Humanizing Brand Experience model, weighted by healthcare engagement in each market.

Rank	Brand
1	Valley Health System
2	OhioHealth
3	University of Iowa Health Care
4	Johns Hopkins Medicine*
5	UR Medicine
6	Baptist Health South Florida
7	Northwestern Medicine
8	University of Miami Health System
9	UT Southwestern Medical Center
10	The Ohio State University Wexner Medical Center

*Multiple markets NET score

Differences in presentation (i.e., name, logo) between research fielding and report development may occur.

The names and logos here reflect the brands that were included during this year's research fielding (November-December 2022). Some brands may have evolved or been updated since that time.

Rank	Brand
11	Mayo Clinic*
12	Nebraska Medicine
13	Bronson Healthcare
14	Baptist Health
15	The University of Kansas Health System
16	UChicago Medicine
17	UAB Medicine
18	Asante
19	University of Michigan Health*
20	TriHealth
21	Emory Healthcare
22	The Christ Hospital
23	Mass General Brigham
24	UNC Health
25	Memorial Healthcare System
26	Duke Health
27	Palm Beach Health Network
28	Roper St. Francis Healthcare
29	Torrance Memorial Medical Center
30	Kadlec
31	Penn Medicine
32	Cleveland Clinic*
33	Catholic Health
34	Ochsner Health System
35	UT Health San Antonio

Rank	Brand
36	Crouse Health
37	UCSF Health
38	Henry Ford Health
39	Beaumont Health
40	Texas Health Resources
41	McLeod Health
42	Virtua Health
43	Stanford Health Care
44	UC Davis Health
45	Main Line Health
46	Northeast Georgia Health System
47	University Hospitals
48	University of Utah Health
49	Froedtert & Medical College of Wisconsin*
50	Spectrum Health
51	UVA Health
52	ChristianaCare
53	Intermountain Healthcare
54	Northwell Health
55	MUSC Health*
56	UC San Diego Health
57	IU Health
58	BayCare
59	Dartmouth Health
60	UC Health

*Multiple markets NET score

Rank	Brand
61	Rush University System for Health
62	University of Maryland Medical System
63	Memorial Hermann
64	National Jewish Health
65	LCMC Health
66	St. Luke's Health System
67	St. David's HealthCare
68	NewYork-Presbyterian
69	Yale New Haven Health
70	Saint Luke's Health System
71	Cedars-Sinai
72	UCLA Health*
73	NorthShore University HealthSystem
74	Mercy Hospital
75	UCHealth
76	NYU Langone Health
77	Inova
78	Hoag Memorial Health
79	Houston Methodist
80	UPMC
81	BJC HealthCare
82	Mount Sinai Medical Center
83	Methodist Health System
84	Rochester Regional Health
85	Tampa General Hospital

Rank	Brand
86	Community Health Network
87	AdventHealth*
88	UW Medicine
89	Mercy Medical Center
90	Beth Israel Lahey Health
91	Bellin Health
92	SSM Health
93	St. Elizabeth Healthcare
94	Mount Sinai Health System
95	Orlando Health
96	Beacon Health
97	Prisma Health⁺
98	HonorHealth
99	UCI Health
100	Scripps Health
101	Atlantic Health System
102	Northside Hospital Atlanta
103	Sparrow
104	Edward-Elmhurst Health
105	Sharp HealthCare
106	Baylor Scott & White Health*
107	Methodist Healthcare
108	Atrium Health
109	Allegheny Health Network
110	Grandview Medical Center

*Multiple markets NET score
⁺Based on Greenville, South Carolina market only

Rank	Brand
111	Tidelands Health
112	HealthONE
113	Centura Health
114	East Cooper Medical Center
115	MemorialCare*
116	St. Peter's Health Partners
117	Tufts Medicine
118	Novant Health
119	Carilion Clinic
120	Jefferson Health
121	OHSU Healthcare
122	Swedish
123	M Health Fairview
124	Keck Medicine of USC*
125	George Washington University Hospital
126	HealthPartners
127	UF Health*
128	Providence*
129	HealthCare Partners*
130	University of Michigan Health-West
131	Advocate Health Care*
132	UnityPoint Health*
133	Allina Health
134	Nuvance Health
135	Banner Health

Rank	Brand
136	Saint Joseph Health System
137	St. Luke's Hospital
138	SCL Health
139	Piedmont Healthcare
140	Sunrise Health
141	Elliot Hospital
142	Sutter Health*
143	Franciscan Health
144	Trinity Health*
145	Hartford HealthCare
146	North Kansas City Hospital
147	MedStar Health*
148	Presbyterian Healthcare Services
149	Loyola Medicine
150	Aurora Health Care*
151	Mercy Health Cincinnati
152	OSF HealthCare
153	WellStar
154	MaineHealth
155	Medical City Healthcare
156	MultiCare
157	Saltzer Health
158	Legacy Health
159	Goshen Health
160	Carle Foundation Hospital

*Multiple markets NET score

Rank	Brand
161	Hackensack Meridian Health
162	Dignity Health*
163	SwedishAmerican
164	AMITA Health
165	LifeBridge Health
166	South Bend Clinic
167	University Health System
168	HCA Healthcare*
169	Conway Medical Center
170	WakeMed Health
171	Grand Strand Health
172	Baptist Health System
173	OptumCare*
174	Munson Healthcare
175	The Valley Health System
176	CHI Health*
177	Ascension*
178	Tulane Medical Center
179	Lake Health
180	Concord Hospital
181	RWJBarnabas Health
182	University Medical Center
183	Virginia Mason Franciscan Health
184	Mount Carmel Health
185	UNM Health System

Rank	Brand
186	Saint Alphonsus Health System
187	Kaiser Permanente*
188	MercyOne
189	Detroit Medical Center
190	Central Maine Healthcare
191	PeaceHealth
192	MaineGeneral Health
193	Brookwood Baptist Health
194	HCA Midwest Health
195	Denver Health
196	McLaren Health Care
197	Grady Health System
198	Adventist Health
199	Northern Light Health
200	West Valley Medical Center (HCA)
201	Steward Health Care
202	The MetroHealth System
203	Lovelace Health System
204	AtlantiCare
205	University Health
206	Sentara Healthcare
207	Trident Health

*Multiple markets NET score

Top 10 biggest movers 2022 to 2023

Brand		2022 National Rank	2023 National Rank	2022-2023 Rank Change
McLeod Health	McLeod Health	91	41	50
Northwell Health	Northwell Health	101	54	47
Torrance Memorial Medical Center	Torrance Memorial Medical Center	75	29	46
Sparrow	Sparrow	145	103	42
Nuvance Health	Nuvance Health.	172	134	38
Allina Health	Allina Health	165	133	32
Emory Healthcare	Emory Healthcare	52	21	31
St. David's HealthCare	St David's HealthCare	98	67	31
M Health Fairview	M Health Fairview	154	123	31
Henry Ford Health	Henry Ford Health	66	38	28

Top disruptor brands with scores higher than this year's #1-ranked brand: Valley Health System

Brand	
Heal	heal
Parsley Health	Parsley Health
Kindbody	kindbody
Maven	MAVEN
Forward	FORWARD
Carbon Health	Carbon Health

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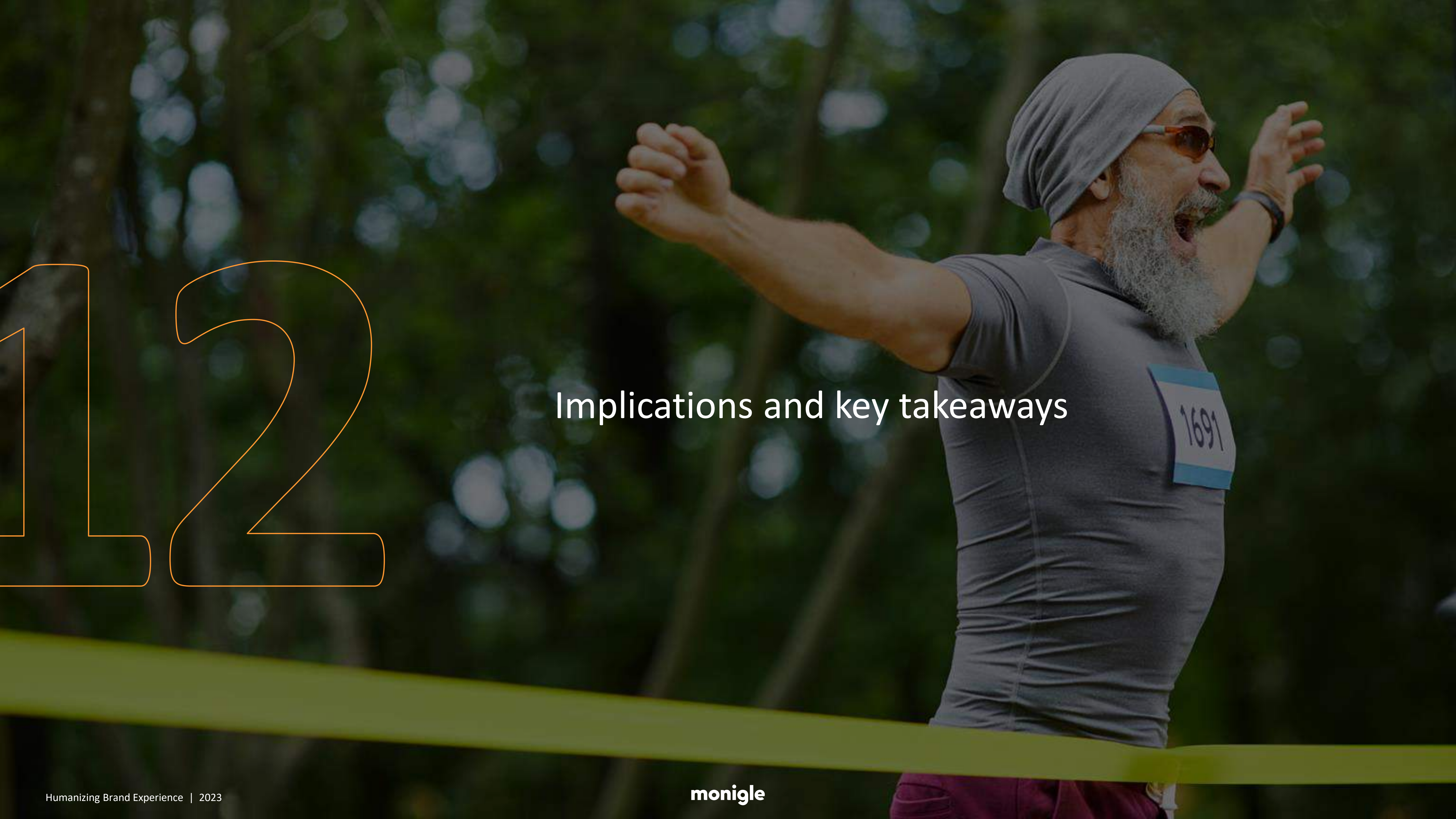
12

Implications and key takeaways



1

The working-across imperative—consensus-building and collaboration as keys to value creation

The pandemic enabled (and sometimes forced) a surprisingly high level of natural, meaningful collaboration across health, care and wellness leaders and teams. The current challenges surrounding consumer engagement, self-care preference, doctor dodging and addressing the ease and access challenges that plague many organizations are better served by different teams and diverse experts working together. Can we extend this crucial collaboration so that it becomes a part of who we are as leadership teams?

- **Leadership understanding enables collaborative impact.** Defining the focus areas and priorities for each of your leaders can help them to be more effective. Make sure your peers are clear on your goals and primed to make an impact.

- **Facilitate your colleagues' greatness.** People like you, with marketing and brand in their DNA, are natural at understanding, refining and amplifying stories. Help your leadership peers to understand their own stories and guide them on how they can amplify them—internally and externally.

- **Own the why.** At the end of the day, the ability to make an impact across an organization depends on how much you believe in what you're doing. And belief comes from a clear connection to the why behind the effort. Own that why, whether that comes in the form of quantitative data, a compelling patient story or a direct experience that brings an issue to life. Articulating why your peers should follow you will enable you to create momentum that can make an impact across your enterprise.

2

Rebalance your brand strategy to be equally grounded internally and externally

So often, the brands we lead were built almost entirely on the needs of our consumer or patient audiences. This was a correction to issues of the past when we didn't listen intently enough to our external audiences and their changing needs. In the spirit of post-COVID corrections, the best healthcare brands of tomorrow will be balanced—bringing equal parts consumer expectation and workforce desire. We're not saying you should throw away your current strategy, but opportunities exist to ensure that your positioning is balanced.

- **Clarify your brand's positioning and benefit to the workforce.** Call it employer brand, employee value proposition or even an internal brand. The language, to us, is less important than the critical work of defining why your employees should choose to work for you and stay with you. Have you clearly articulated this to balance your consumer or patient proposition?

- **Build a bridge with HR to deliver brand and culture together.** Delivering a great experience to your existing and potential workforce is contingent on the culture of your organization. You may need culture mapping to understand the current and desired culture attributes. You may need clearer behaviors and commitments that guide the interpersonal interactions that make an impact on your experience. Collaborating with HR is key. Maintain the momentum you built during the pandemic and strengthen your ability to influence how people deliver the brand you've built.

- **Stretch your capabilities into new spaces.** Brand and marketing leaders' expectations have never been higher. At the same time our skillset as health, care and wellness leaders is constantly evolving. We need to clarify purpose for our teams and empower them to be more agile. We often speak with clients about what they want to be famous for within their organizations. Can you answer that question? If you can't, let's start there. If you can, the next question is about the alignment of your current capabilities to that future aspiration. Do you have the right people, processes and skills in place to get there? Investigating your goals through these two lenses may enable you to stretch further to make a bigger impact.

3

Tailor systemness to your organization's unique perspective and your community's goals

From a consumer perspective, we see the benefits of systemness making a comeback because of its significance and ability to drive behavior. Sarah Sanders at UCSF Health offered insights that challenged the traditional definition of systemness from the inside out. You need a clearer "why" around systemness if you want to maximize its impact on your organization's growth. It has to go beyond the basics to reflect what makes your brand, culture and experience special. Then, you can rigorously apply that filter against your priorities.

- ☑ **Re-evaluate your positioning.** Do you have more than one location? (If you're reading this report then the answer is probably yes.) More than one site of care means you need to define systemness for your audiences inside and out. If your current positioning doesn't already define your unique flavor of systemness, it's time to put your brand positioning hat on (or to call your favorite brand strategy people—pro tip: we still have an 800 number).

- ☑ **Ensure that your decisions reflect the systemness that you want to create.** UCSF Health prioritizes equitable care delivery and builds partnerships to get there. It's not enough to just have your systemness crystallized; you also need to champion its application in the board room, at the strategy table and through your partnerships and ventures.

- ☑ **Measure to ensure impact.** It is also critical to constantly evaluate whether your approach to systemness is meeting the needs of your consumer audiences. With the cautionary COVID tale when systemness temporarily lagged on overall importance, we want to keep a close eye on the role and definition of systemness. Do it through this report annually or add it to your brand tracking research. Either way, this pulse check will ensure that your efforts are paying off among the people that matter.

4

Rethink the role and performance of your content engine

How you think about, deploy and measure the impact of your content should evolve as consumers, the industry and your organization's goals change. Instead of a one-size-fits-most approach, your tools, technologies, resources and partners require that you rethink the role that your content engine plays for your enterprise. Remember, it's not just yours anymore, either. You should be revving this engine in support of consumers and employees—both current and potential.

- ☑ **Get buy-in from leadership on the role of your content and what you want it to do**. Remember the lesson from Virtua Health—not every message has to drive a transactional outcome.
- ☑ **Stop putting off the integration of segmentation into your content work.** Build it from scratch or borrow from an existing source (like the Humanizing Brand Experience segmentation). Your content needs precise delivery, and segmentation makes it easier.
- ☑ **Build a culture of listening via formal and informal research channels.** Whether you build it in house or leverage partners, collecting data and learning how to integrate it into your decision-making must become second nature to not just your team but your entire enterprise.
- ☑ **Bring HR to the table.** Think about content for both internal audiences as well as the external ones. The same principles of engagement for consumers can be applied to workforce recruitment and retention.
- ☑ **Start small so that you can test and learn.** Put some wins on the board that then expand your reach. One of the biggest barriers to action is trying to fix everything all at once. Don't even go there. Start with achievable wins to demonstrate the potential for impact.

5

Think like a chief customer officer (if you aren't already)

When we think about the combination of takeaways presented here, they each wrap together into a bigger idea, an opportunity for us to continue to shift and elevate the role of brand, culture and experience to a more impactful place. Today's health, care and wellness world requires each of us to think like a chief customer officer.

- **Increase your reach into patient-centered care.** Your role as CCO, which is focused on enhancing the experience, may be particularly important in driving organizational success.
- **Assess, design and test amid increasing competition.** We know that our organizations need to clarify what we do better or differently. You, as the CCO, can play a key role in enhancing the understanding of the experience and driving how and where our brand, culture or experience can stand out in a crowded marketplace.
- **Own adaptability within a sea of constant change.** Our landscape is constantly evolving, with new technologies, regulations and models creating new challenges and opportunities for health, care and wellness every day. In the role of CCO, you can help your organization to stay ahead of these changes by providing a deep understanding of people and their needs, to identify opportunities to improve nearly every facet of your enterprise.

Want to join the movement?

Subscribe to Humanizing Brand Experience and gain access to data for your brand, any set of competitors locally or across the country, as well as any market that matters to you and your leadership colleagues. Joining this exclusive group of brands that drive Humanizing Brand Experience also provides access to the annual report learnings prior to its distribution to the rest of the country.

Still hungry for more? Become a part of **our Humanizing Brands Collective**, a growing group of leaders from brands across the country who meet quarterly to share best practices, field new research and challenge what it means to deliver healthcare brand experiences in today's quickly changing world.

For more information get in touch with us here:
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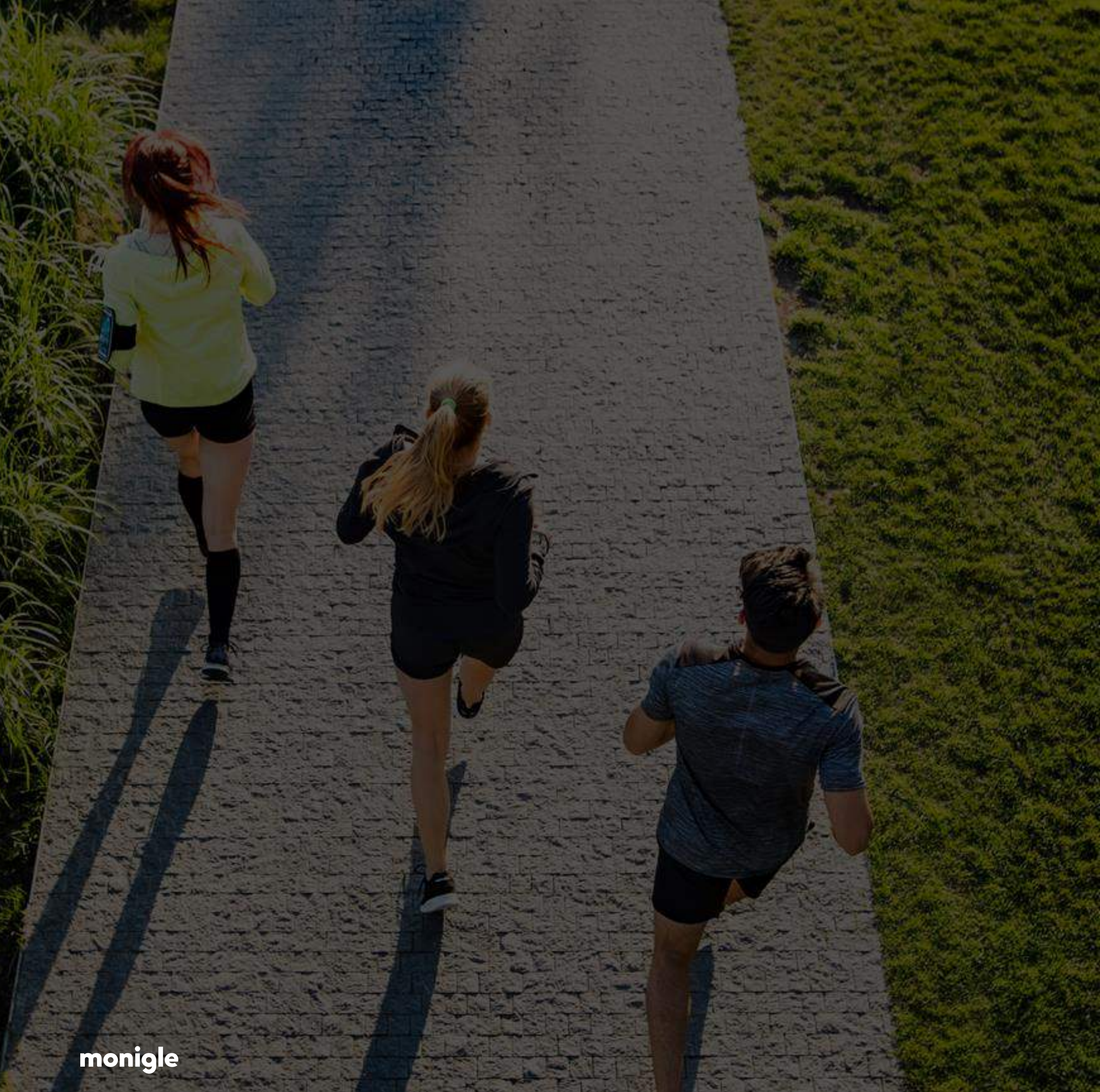

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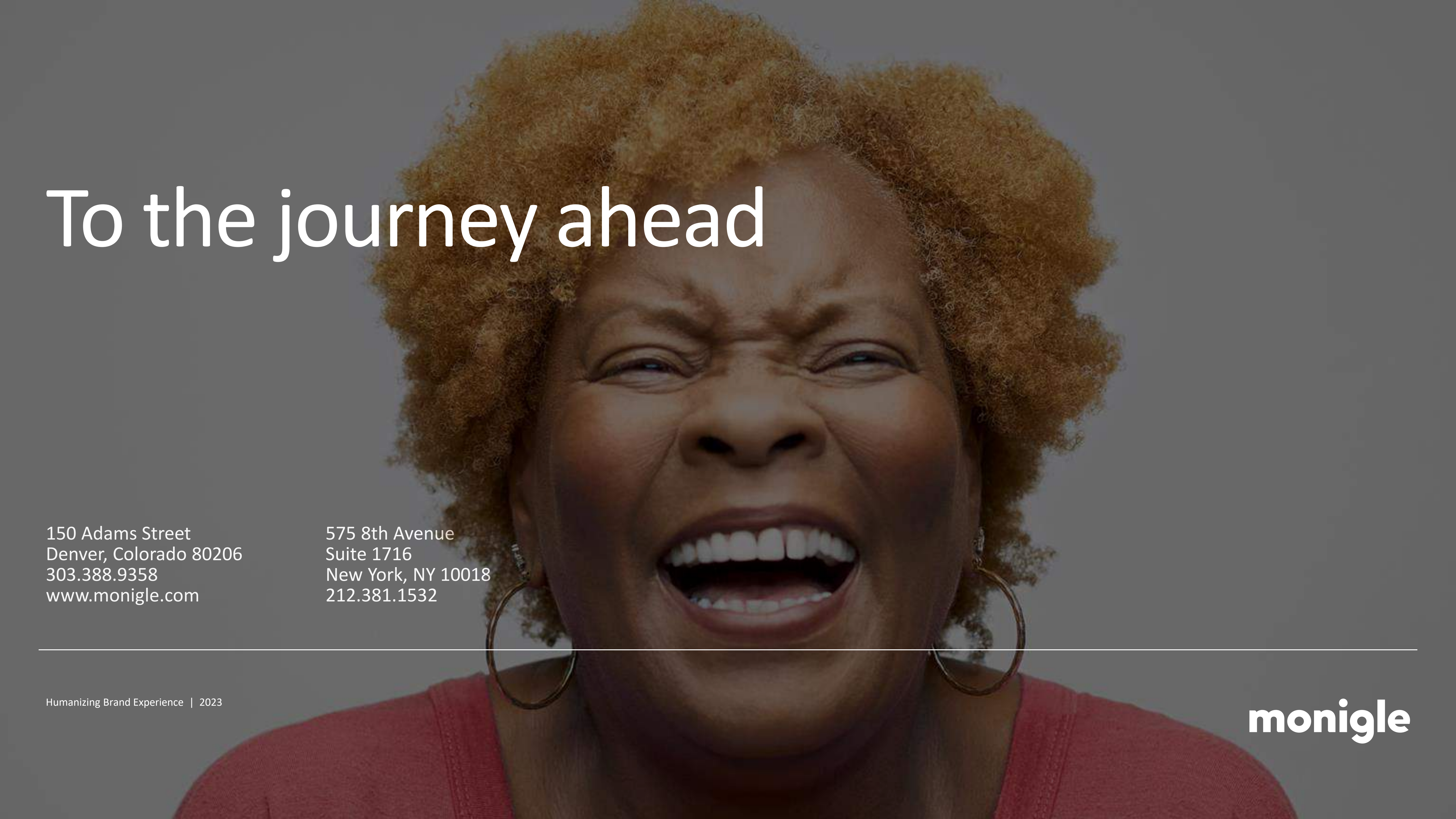

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150 Adams Street
Denver, Colorado 80206
303.388.9358
www.monigle.com

575 8th Avenue
Suite 1716
New York, NY 10018
212.381.1532

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METHODOLOGY AND DETAILS

THE HUMANS

Health care decision-makers for the household that have received medical care in the past 2 years and have health insurance (70% Private / 30% Government - excludes Medicaid)

THE METHOD

Online quantitative survey with health care consumers across the U.S. sourced from panel sample

THE NUMBERS

n = 25,521 total respondents

n = 3,000 respondents who are nationally representative of the U.S. in terms of gender, age and region

n = 22,521 respondents who are from all 64 markets where brands were evaluated

THE FIELDWORK

Wave 6 (2023) November –December 2022

Wave 5 (2022) November –December 2021

Wave 4 (2021) November –December 2020

Wave 3 (2020) November –December 2019

THE SCIENCE

Quantitative analysis used z-tests to identify statistical significance at a 95% confidence level, as well as Factor Analysis, Cluster Analysis, MaxDiff, Shapley Value Regression, Structural Equation Modelling (SEM) and Weighted Moving Average (WMA) scoring