VOL. 4 HEALTHCARE EDITION

Humanizing Brand Experience

monigle

SHSMD Society for Health Care Strategy & Market Development™

AHA Data & Insights

A year of unimaginable change.

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It seems like this past year changed everything. COVID-19 devastated and disrupted our lives in every way, inflicting immense loss and suffering worldwide and in our own homes.

As we're writing this introduction, 116 million people have been infected with the virus, and 2.5 million individuals have lost their lives.[1] Those numbers are gut-wrenching to the average person, but to those working in our healthcare industry, they hold a specific significance, a sharp clarity in contrast to the blurring of broad statistics.

So much of the emotional weight of the pandemic has been put on people in healthcare. They've been asked to step up and put their lives at risk on the frontlines, adapting rapidly to a situation that seemed to shift and intensify by the minute. They've had to fight this virus head-on, coming face to face with its impact and devastation—and they've done it with grace,

[1]https://coronavirus.jhu.edu/map.html

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heroism, and unwavering compassion. That's why we're writing this year's introduction to you directly, because for the healthcare industry it's been a deeply, unavoidably personal year.

The data in our research this year reflects the mass disruption experienced by people across the United States. Amidst the chaos and uncertainty of the pandemic, gains in healthcare engagement have been shaken. Inequity in access to care has been spotlighted. Concerning care delays, once a question of convenience, have increased due to fear—a new and significant barrier to people getting the essential care they need.

So much of our industry has been altered. And yet, the data also tells us that people's fundamental emotional, functional, and experiential needs from healthcare have remained the same. While our world has transformed around us, our hearts have not. And that means everything when it comes to looking to the future of healthcare brand experiences in the new, post-pandemic environment.

If one thing is certain coming out of this tumultuous year, it's that we are not going "back" to normal as it was. But that doesn't have to be a bad thing. COVID-19 created a catalyst for change from a healthcare brand and experience perspective—one that was much needed and a long time coming. Virtual care solutions were set up and deployed in a matter of weeks. Internal barriers were broken down as collaboration became essential to quick pivots and changing priorities. Brands from across the industry came together for the good of the communities and consumers they serve. For these reasons and more, this year's report is not focused on how to get back to before, or even how to fix the damage inflicted by the virus. Instead, it's focused on how we can and must adapt to fit the new future of healthcare that's now on the horizon.

In the following chapters, we explore the opportunities brands can leverage to chart their path into the next era of health and care. We will pinpoint the experience gaps that have become even more pronounced over the past year, and break down how to address them (here's a hint: it's not about launching a new ad campaign). And, we will continue to highlight how healthcare brands can deliver on the fundamental emotional needs of their consumers: the stuff that hasn't changed, because it's the stuff that makes us human.

We can't go back. But we can go forward, together. This report is here to help all of us do that.

On behalf of everyone at Monigle, and in support of brighter days ahead,

Your Monigle Team

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Chapter

01

A Health Setback

There's no way around it: This year was hard.

COVID-19 exposed the cracks in the healthcare system and beamed a harsh spotlight on the consumer experience weaknesses that were already plaguing the industry pre-pandemic. Issues such as inconsistent experiences, misaligned systems and teams, and challenges in accessing health information continue to create barriers to great brand experiences.

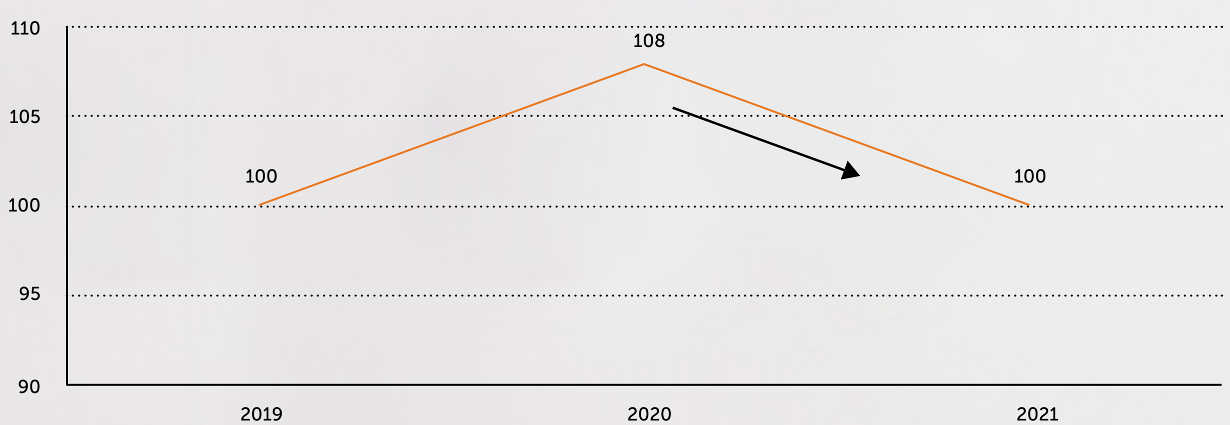
While the amplification of healthcare's flaws has been louder and more viscerally felt than ever before, these fundamental problems were here long before COVID-19—and if brands don't act, these issues will continue lurking long after the vaccine is distributed, too.

Healthcare brand experiential weaknesses, in combination with the uncertainty and chaos of the pandemic, have led to a stunning decrease in health and wellness engagement among vast numbers of consumers across the country. Overall, health engagement has returned to 2019 levels after seeing an eight-point improvement only a year ago.

When we deconstruct engagement into its components, we discover a surprising reality.

While healthcare has been front and center for many throughout the pandemic, the biggest softening in engagement is in peoples' Topical Interest in content about health and wellness. The perpetual waterfall of content may have left them feeling fatigued and overloaded.

2019–2021 U.S. HEALTH ENGAGEMENT INDEX



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This is a call to action.

Beyond Topical Interest, consumers are also not seeing as much financial value in the healthcare transactions that they are considering and also appear to be limiting their openness to new approaches to care. Consumers may just be overwhelmed, but monitoring engagement's impact going forward will be key as we bring people closer to our brand experiences.

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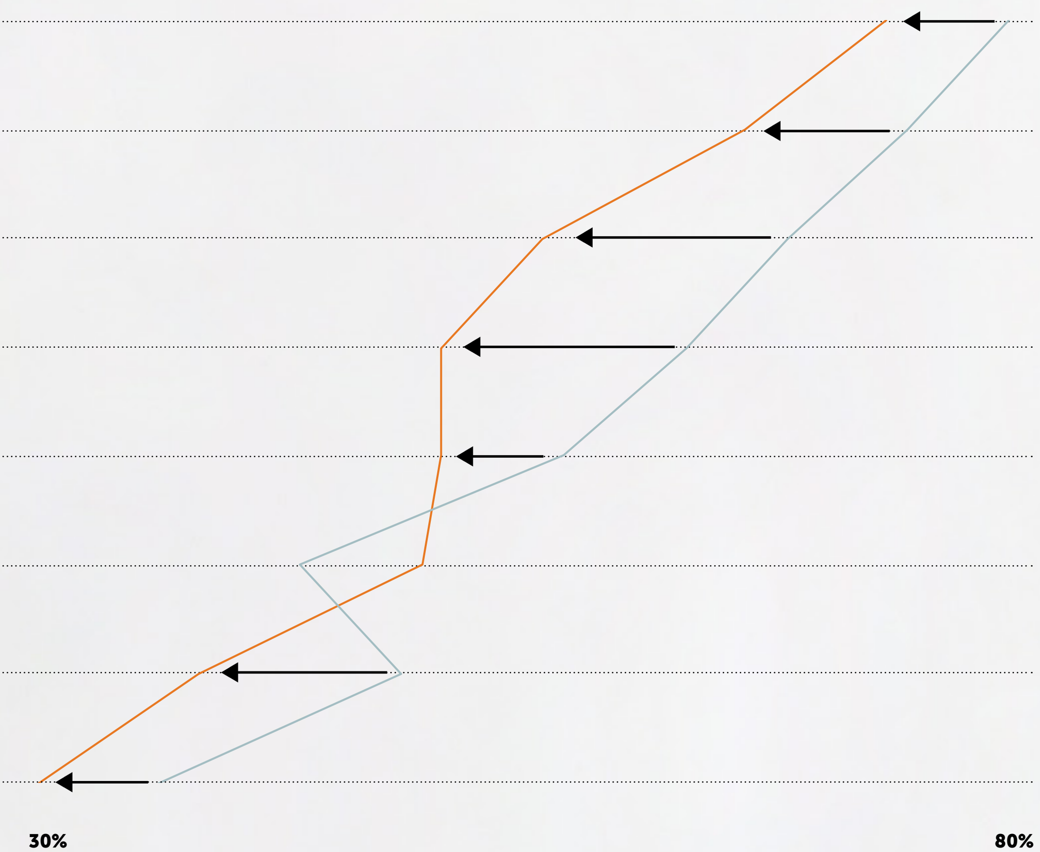
2020–2021 U.S. HEALTH ENGAGEMENT INDEX

	2021	2020	% Change 2021-2020
Emotional Value I feel peace of mind after receiving healthcare services or treatment	75%	78%	▼ 3
Proactivity I often do my own research on my symptoms and/or treatments	69%	73%	▼ 4
Symbolic (Financial) Value I think it is worth the extra cost to go to the best healthcare provider or facility	61%	67%	▼ 6
Topical Interest I'm interested in watching or reading about health and wellness-related topics	55%	62%	▼ 7
Category Participation I tend to avoid getting healthcare services unless I'm really sick or injured	55%	57%	▼ 2
Control I [do] always trust my healthcare provider to make the right decisions for me	49%	46%	▲ 3
Innovativeness I tend to try new approaches to taking care of my health and wellness before other people I know	43%	48%	▼ 5
Influence and Advocacy My friends and family consider me a "go-to" for advice and recommendations about healthcare	33%	36%	▼ 3

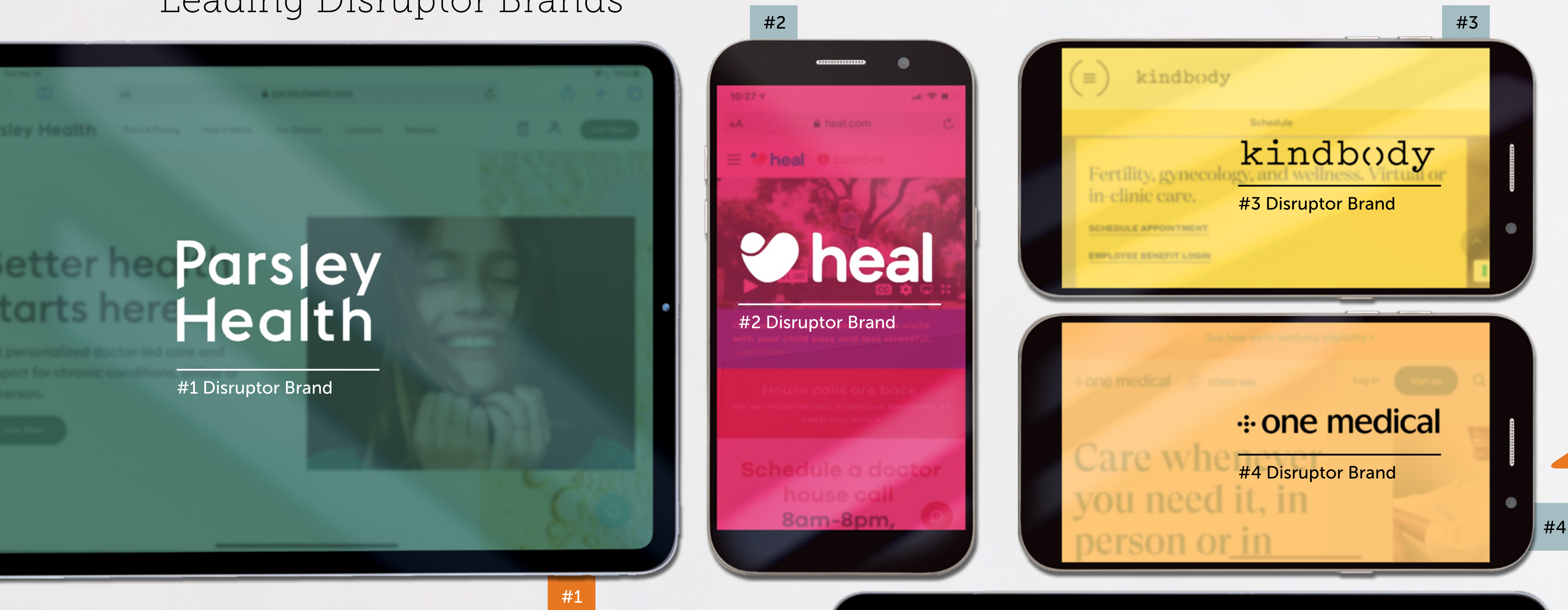


Declining category engagement and shifting consumer preferences are noteworthy on their own.

But what should really put healthcare leaders on notice is the wide-open gap this has created for new brands and experiences to move into. In this new landscape, the Disruptors have thrived during the demands of COVID-19, with innovators such as Parsley Health and Heal performing incredibly well in the overall ranking of brand experiences. These non-traditional healthcare providers began with solutions and offerings that directly filled the gaps in healthcare and were structured from the start to be more adaptable than traditional brands.

An emphasis on consumer-centric innovation and digital experiences helped these brands excel during an unprecedented year.

Leading Disruptor Brands

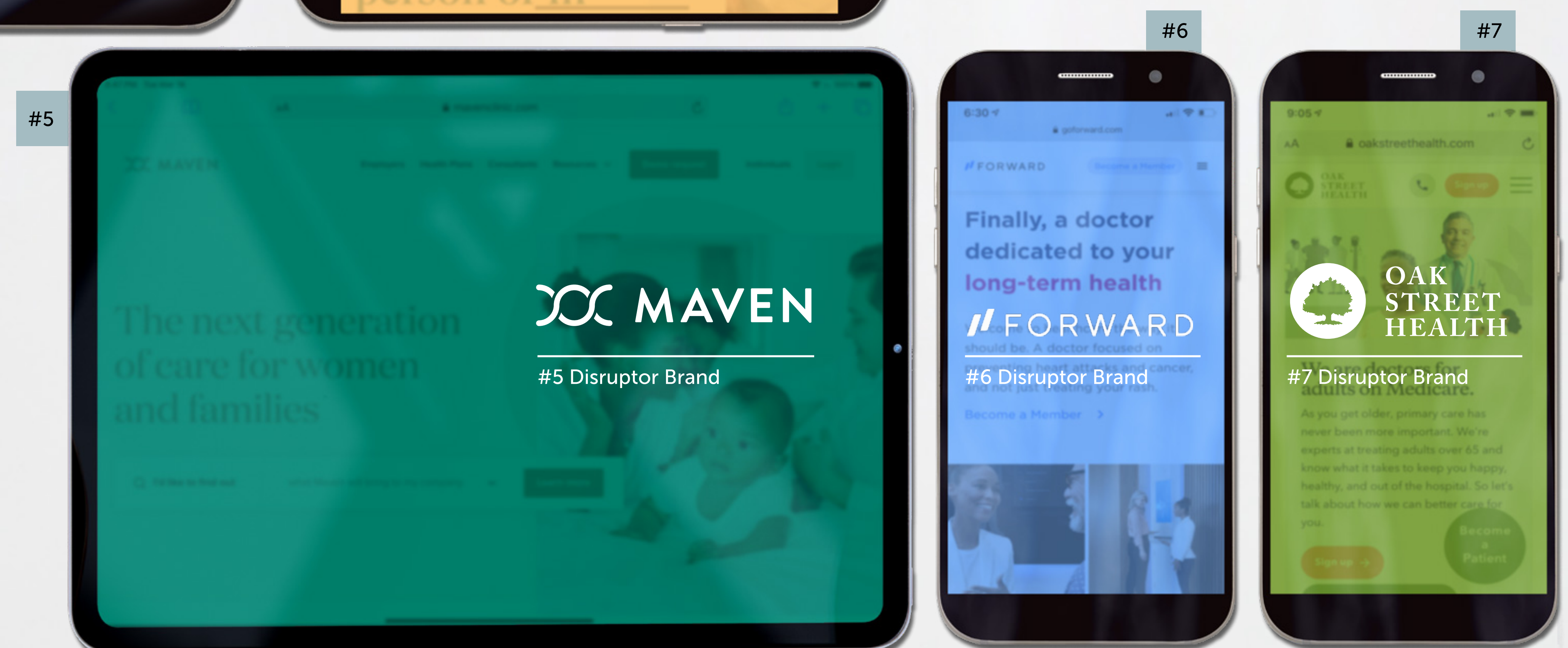


Healthcare leaders, take note:

If you don't embrace the same adaptable mindset, technology-led approach, and consumer-driven strategies as the Disruptor brands, they will continue to outperform your brand—and it's only a matter of time before consumer preferences recover from the scarcity mindset of the pandemic and recalibrate toward these more human brand experiences.

These baked-in strengths powered Disruptors through the pandemic more seamlessly than their slower-moving, traditional counterparts, enabling an easier transition to virtual care when social distance measures restricted in-person visits.

The numbers paint a powerful picture of just how meaningful this agility was: across the **top 7 Disruptors,*** all but one of them performed more strongly than leading healthcare brand Johns Hopkins in overall brand experience rankings.



*These are the brands that would have beaten the top-performing health system brands in this year's rankings.

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Chapter

02

Pandemic Inequity

COVID-19 put a sharp focus on the harsh inequities that exist across many aspects of today's society, and healthcare is no exception. According to the CDC, long-standing systemic health and social inequities have put many, including minority groups, the elderly, and lower-income communities, at increased risk of not only getting sick or dying from COVID-19, but being disproportionately affected by the pandemic's ripple effect of economic, social, and secondary health consequences.[2] Understanding and combating the social determinants of health that led to these types of inequity has been top of mind for industry leaders throughout the year.

Adding to the ongoing conversation about inequality in health and care, this year's data reveals two significant new areas where COVID-19 has disproportionately impacted certain segments of the population: **overall engagement** and **mental health.**

[2] https://www.cdc.gov/coronavirus/2019-ncov/community/health-equity/race-ethnicity.html

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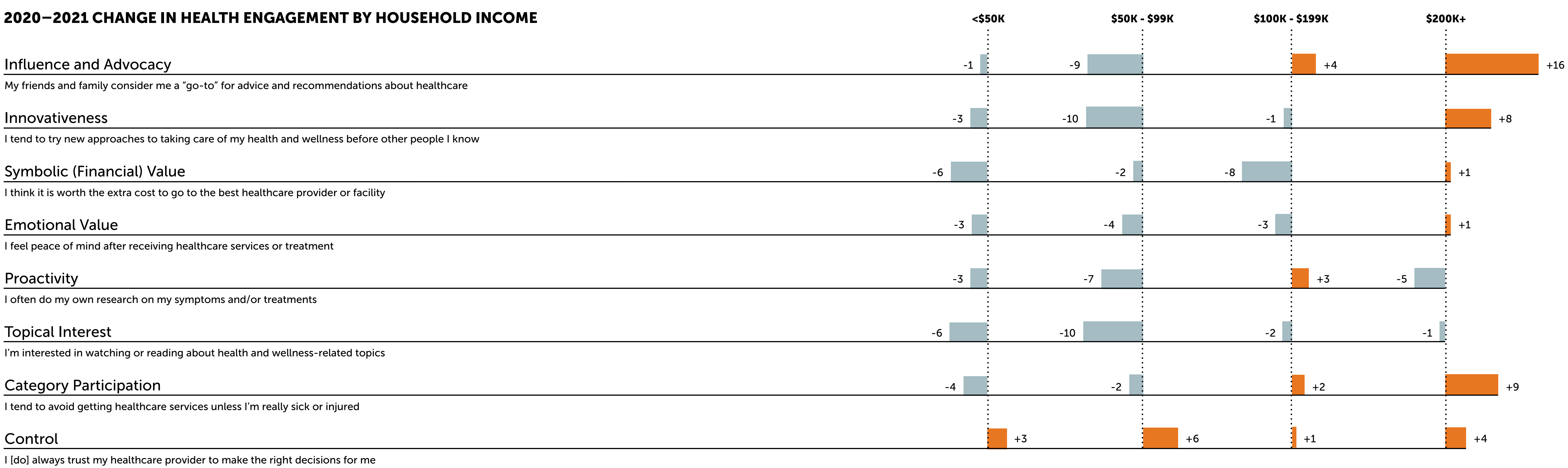
Income is the top indicator of engagement

COVID-19 magnified inequities across the country in terms of how people engage with their health and the category as a whole. According to our data, the most significant factor related to engagement-specific inequity is not race, age, or political party—it's **income**. This year, we saw engagement decline as household income decreased, with the most significant decline in engagement among low- to middle-income households. On the other side of the spectrum, higher-income groups have seen engagement rise yet again, despite the COVID-19 pandemic. This contrast reveals a deep income-driven inequity not only in physical health, but in overall health engagement, social influence, and emotional wellbeing.



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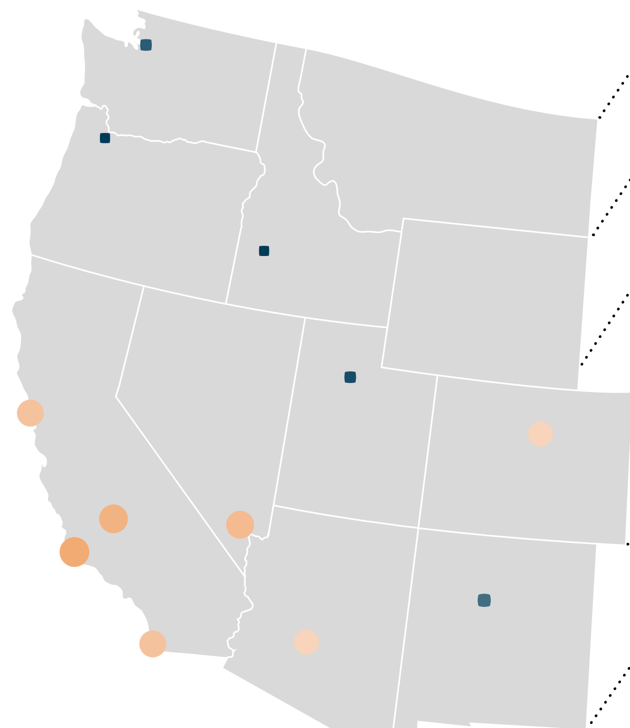
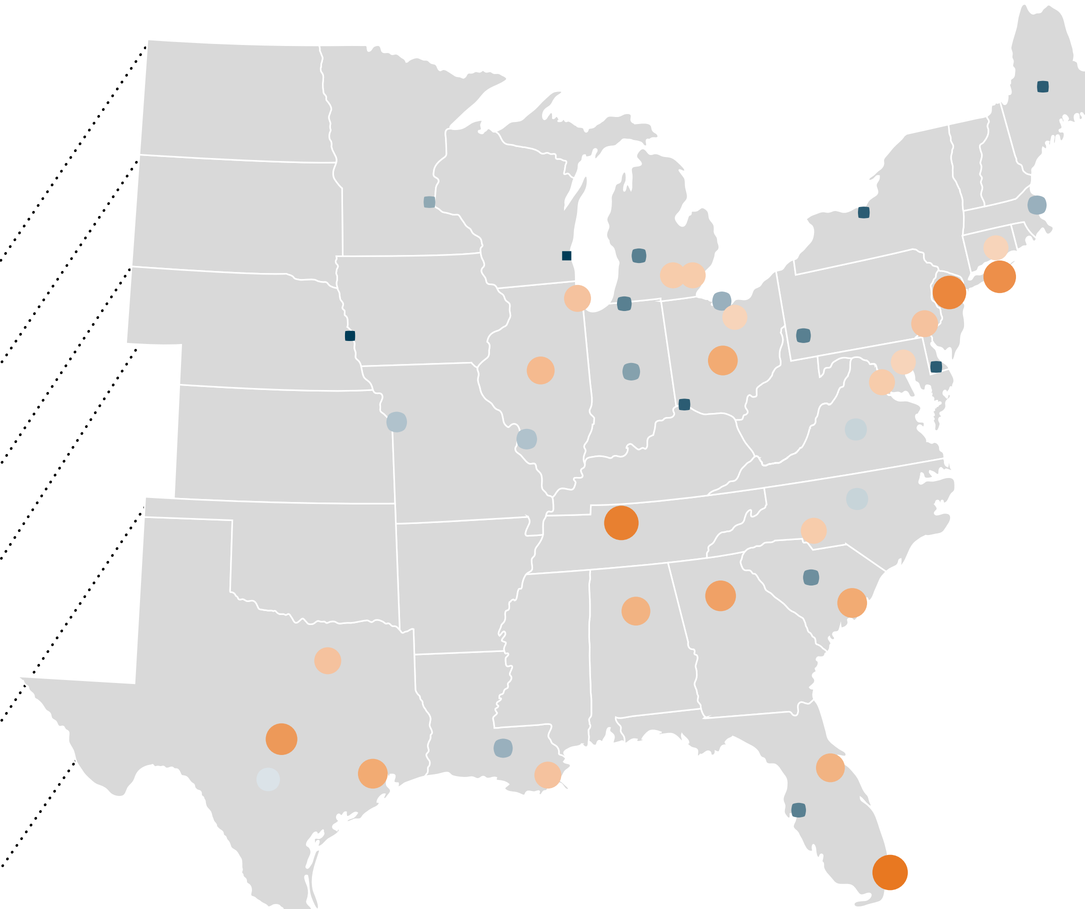
“But my market is unique”—OK, fine, we finally agree (kind of)

Along with varying engagement levels across income groups, engagement with healthcare also varies across the country. Here you can see how much variability really exists across the U.S. Working in a market where consumers are more engaged? Ensure that your messaging and content focuses on differentiation, as people are hungry for insight and eager for content. Working in a market where consumers are less engaged? Focus on bringing people closer to the category through storytelling, positioning, and messaging. Create new experiences that intersect naturally with consumers’ lives to bring health, wellness, and care more front of mind.





Health Engmt. Index	Market
123	Miami
121	Nashville
120	New Jersey
119	New York
118	Austin
115	Atlanta
114	South Carolina
114	Columbus
114	Los Angeles
114	Houston
111	Birmingham
111	Orange High Desert
111	Orlando
109	Las Vegas
109	Illinois
108	New Orleans
108	Philadelphia
108	San Francisco
108	Chicago
108	Dallas
108	San Diego
107	Washington, D.C.
107	Detroit
107	Ann Arbor
107	Charlotte
106	New Haven
106	Akron
106	Phoenix
106	Baltimore
106	Denver
105	San Antonio
104	Raleigh-Durham
104	Virginia
103	St. Louis
103	Kansas City
102	Baton Rouge
102	Cleveland
102	Boston
101	Indianapolis
100	Columbia
99	Tampa
99	South Bend
99	Pittsburgh
99	Grand Rapids
98	Albuquerque
97	Delmarva Peninsula
97	Cincinnati
97	Maine
97	Minneapolis and Rochester
97	Seattle/Washington
96	Salt Lake City
95	Boise
95	Omaha
93	Portland
92	Milwaukee

HEALTH ENGAGEMENT INDEX COLOR

Higher ... Lower

The Healthcare Engagement Index is a multi-market 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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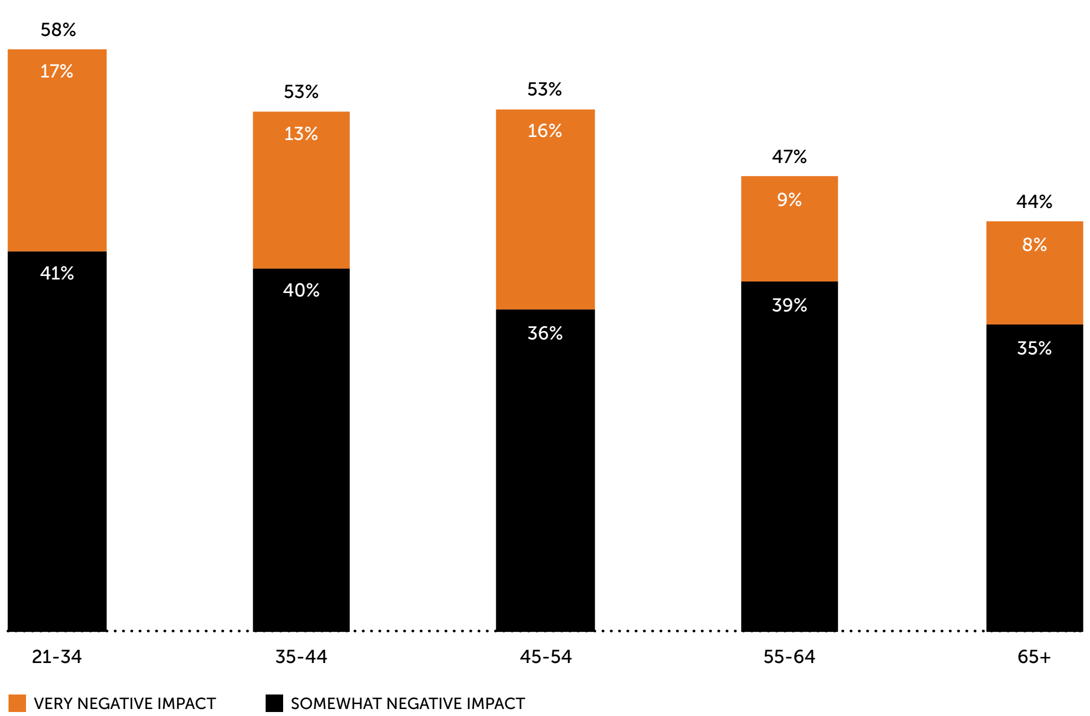
Younger consumers face the worst mental health impact

The pandemic has had a negative impact on the mental health of many individuals across demographic lines, but younger consumers (ages 21-34) have been the most severely affected. Made up of the oldest members of Gen Z and the youngest Millennials, this group reports the highest levels of negative mental health as a result of COVID-19.

As we continue to destigmatize mental health in our society, healthcare brands have an opportunity to step up and lead the way. While providing mental healthcare for individuals is an essential first step, there is an increasing expectation and desire for mental health to be addressed at a collective, community level as well. Healthcare organizations are poised to fill this gap by playing a proactive, elevated role in providing mental health solutions for the communities they serve. Going forward, brands that make mental health education, support, and expertise a central part of their go-to-market approach can fulfill a deep community need while connecting with consumers of all ages.

2021 COVID-19 IMPACT ON MENTAL HEALTH BY AGE GROUP



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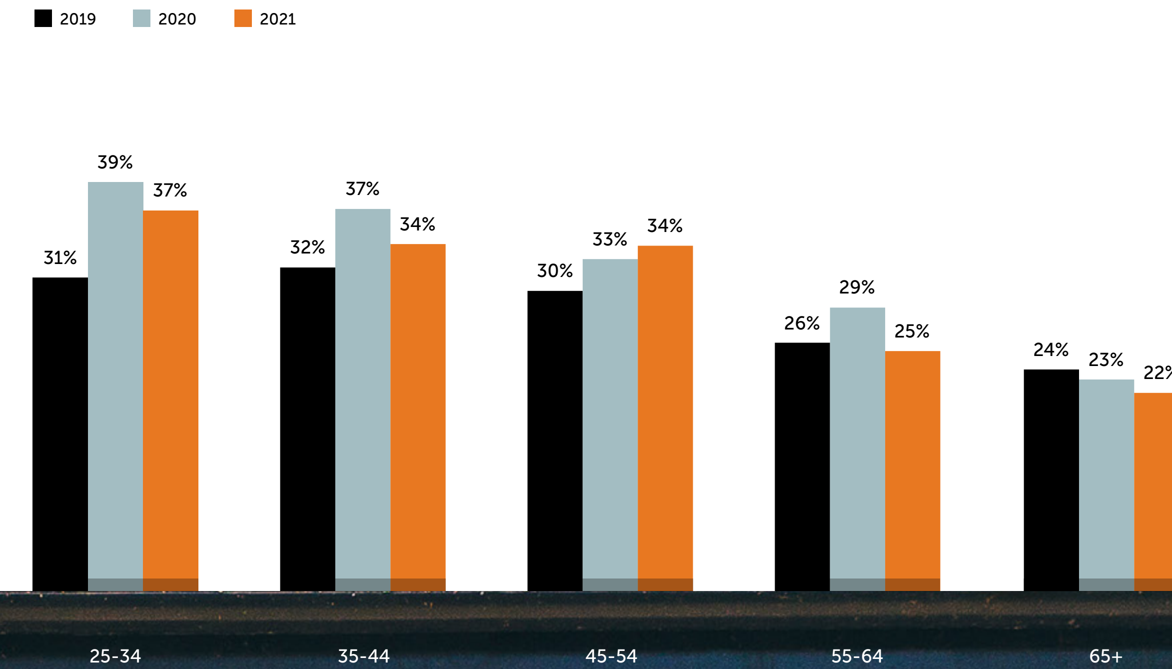
Winning back Millennials

Last year, we explored Millennials' declining trust in traditional healthcare, with an increasing number of individuals reporting that they don't always trust their healthcare provider to make the right decisions for them. This year, we saw trust levels improve slightly for this generation, with fewer consumers expressing outright distrust—though only at the rate of the market.

Just as overall health engagement has softened back to 2019 levels, we are a seeing a similar "return" for trust. However, healthcare leaders will still have to prioritize the building blocks of trust—transparency, consistency, and people-centricity—in order to turn trust levels around, for good.

2019–2021 DISTRUST OF HEALTHCARE PROVIDERS BY AGE GROUP



37%

of 25- to 34-year-olds don't always trust their healthcare provider to make the right decisions for them

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Chapter

03

Delayed Care

Last year, we explored a troubling trend toward delayed healthcare. 35% of consumers were choosing to delay, avoid, or forego healthcare services due to issues including **concerns about cost, lack of time,** and **appointment-scheduling difficulties**. Today, a significant portion of the country's consumers are continuing to delay important care—but the context and reasoning have shifted entirely.

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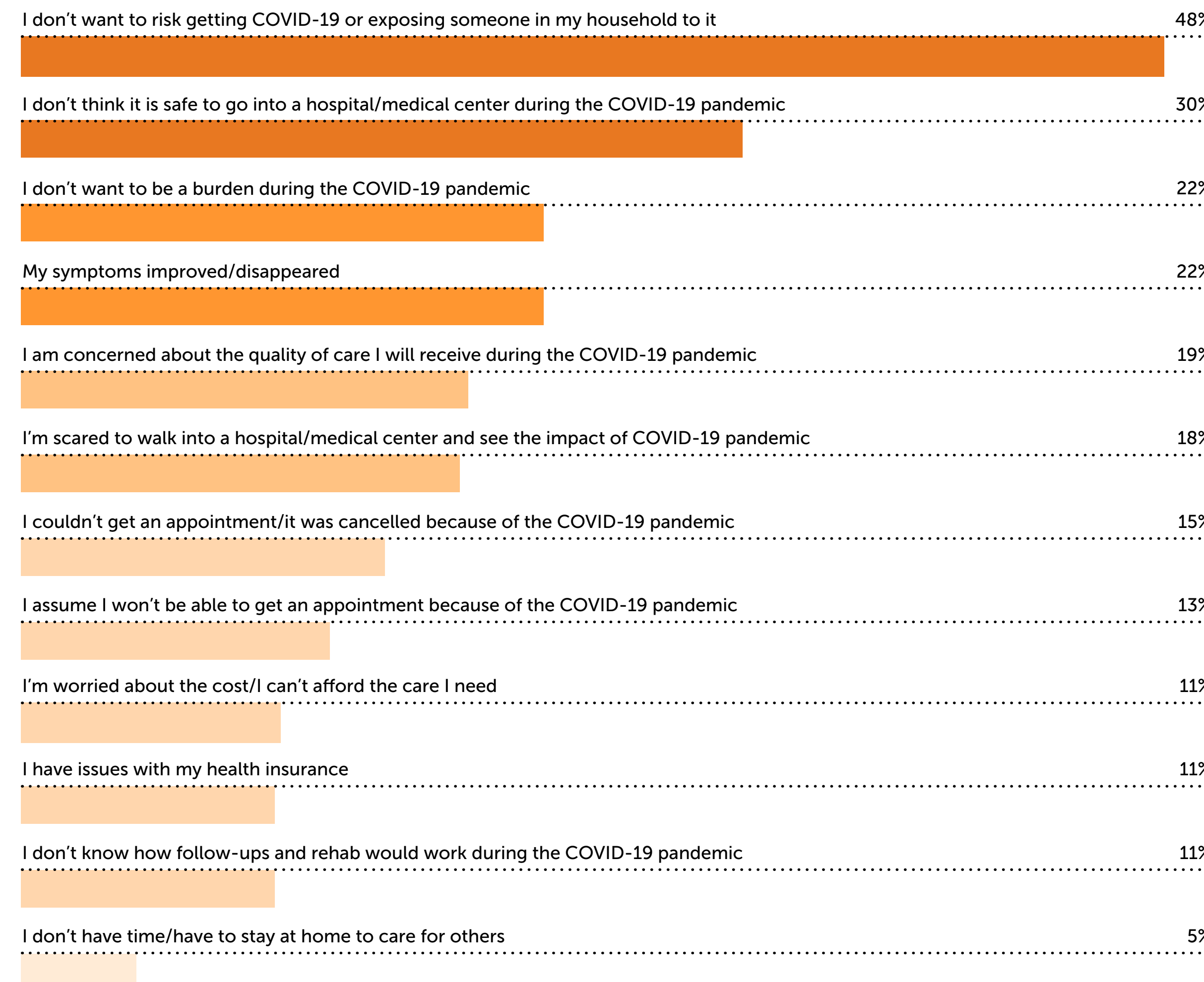
2021 BARRIERS CAUSING DELAYED CARE DURING COVID-19



Concern about safety has become a significant barrier: one-third of consumers are delaying care because they don't feel safe going into a hospital, medical center, or provider's office during the pandemic. And while intent to delay future non-emergency care is softening, a third of people still say they are likely to put off care if they needed it tomorrow.

No longer just a matter of cost and convenience, people are now actively avoiding engaging with their healthcare providers. The new pandemic-induced stressors, combined with the old deterrents, have created a big problem for healthcare brands when it comes to getting people back in their doors.

Delaying important care can have serious health implications for consumers, but it can also spell disaster for a healthcare brand's bottom line. Everyone in healthcare seems to be searching for ways to re-engage their consumers and encourage them to return for the care they need.

Here are three strategies to consider

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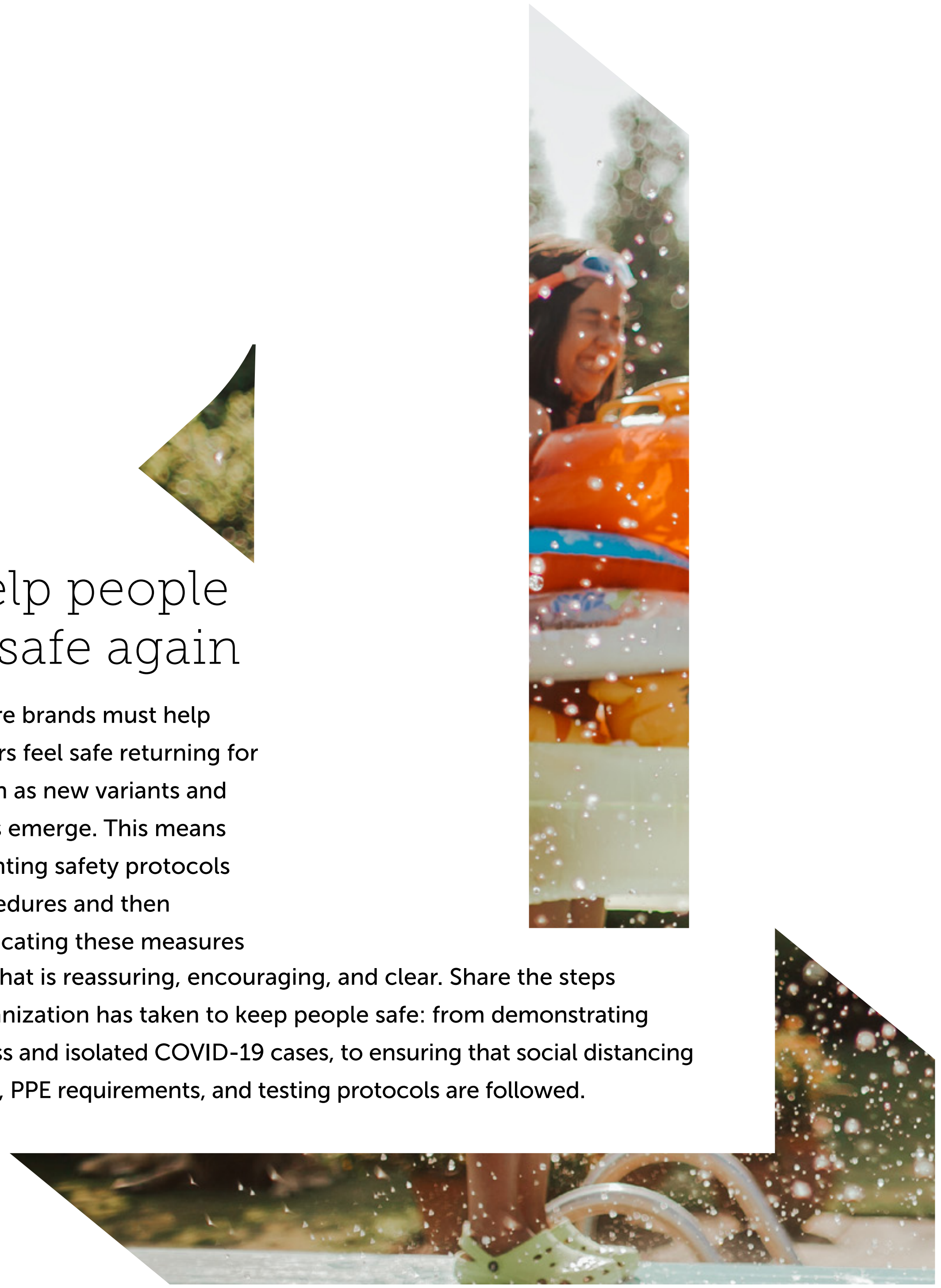

1. Help people feel safe again

Healthcare brands must help consumers feel safe returning for care, even as new variants and questions emerge. This means implementing safety protocols and procedures and then communicating these measures in a way that is reassuring, encouraging, and clear. Share the steps your organization has taken to keep people safe: from demonstrating cleanliness and isolated COVID-19 cases, to ensuring that social distancing measures, PPE requirements, and testing protocols are followed.

Three ways
to re-engage consumers

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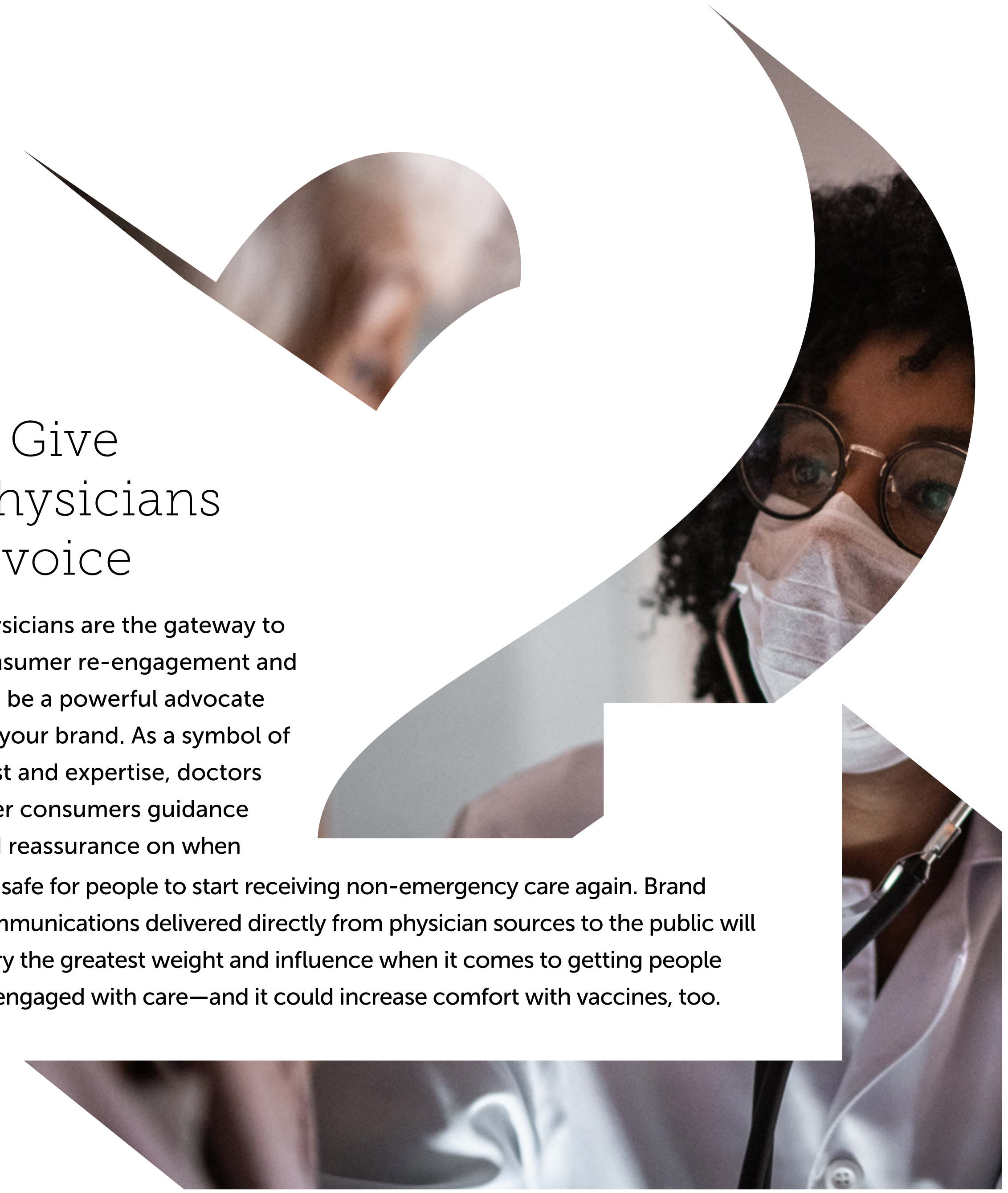

2. Give physicians a voice

Physicians are the gateway to consumer re-engagement and can be a powerful advocate for your brand. As a symbol of trust and expertise, doctors offer consumers guidance and reassurance on when it is safe for people to start receiving non-emergency care again. Brand communications delivered directly from physician sources to the public will carry the greatest weight and influence when it comes to getting people re-engaged with care—and it could increase comfort with vaccines, too.

3. Embrace digital experiences

Telehealth and virtual care were already on the horizon pre-pandemic, and now they are nearing non-negotiable status. If you haven't already done so, you need to build up your digital capabilities so you can bring care straight to your consumers—instead of waiting for them to come to you. Help your audiences understand how virtual care can be an easy route to re-engaging with their health, providing not only a safe way to receive care, but also the control and flexibility consumers were craving pre-pandemic.

These are just a few strategies to get you started.

As we navigate this uncertain landscape, innovation and creativity will reign. Beyond safety measures and telehealth, consider outside-the-box strategies that increase consumer comfort levels, such as hosting appointments in open-air care tents rather than traditional offices. Now is not the time to sit back and wait for your consumers to return. Healthcare brands must be proactive, creative, and adaptable in order to help people re-engage with their health and care again.

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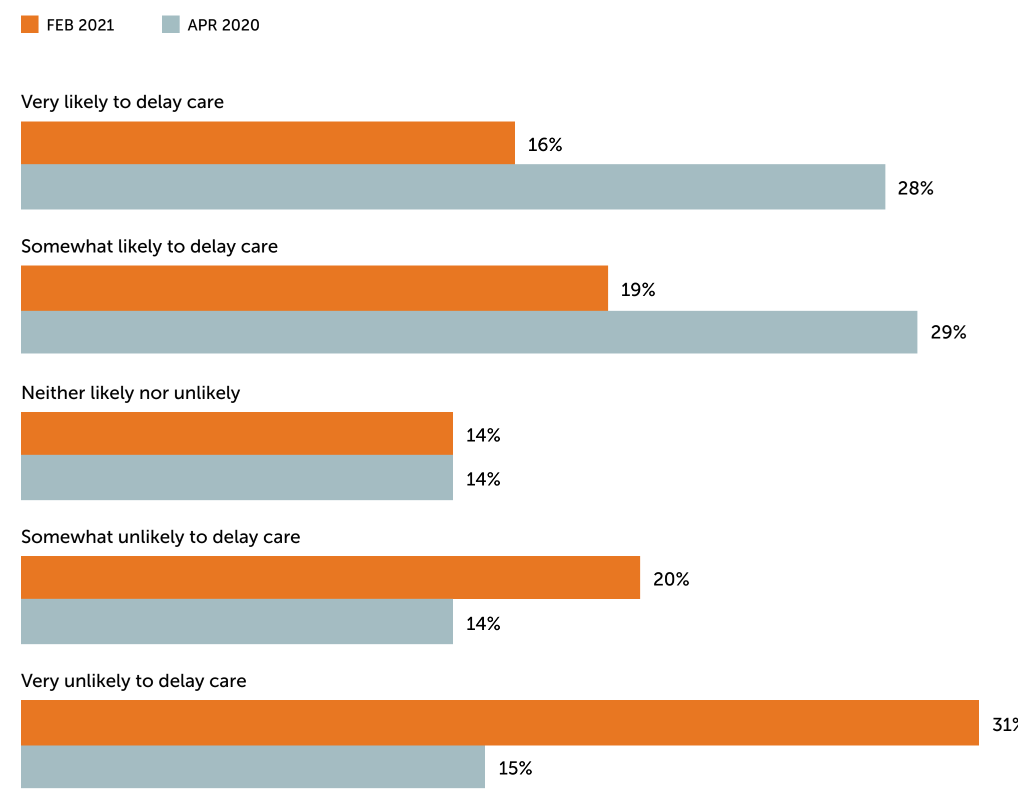
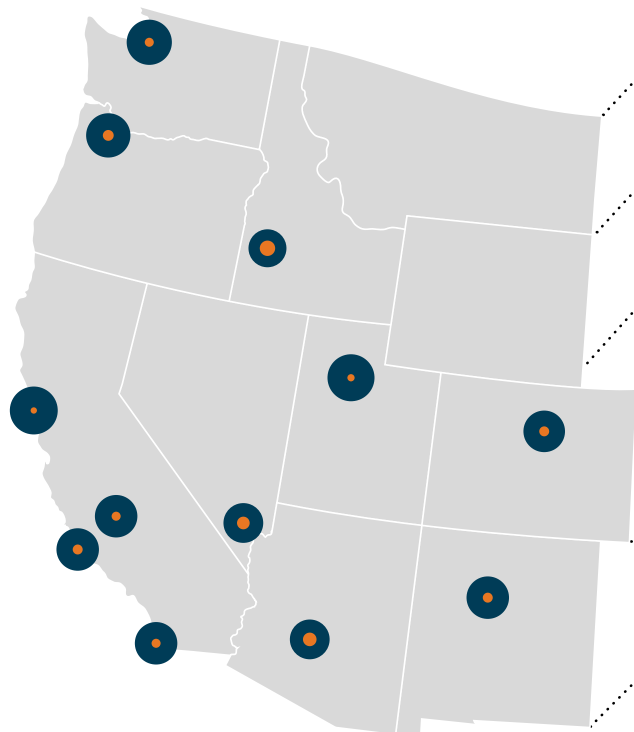
INTENT TO DELAY FUTURE NON-EMERGENCY CARE DURING COVID-19

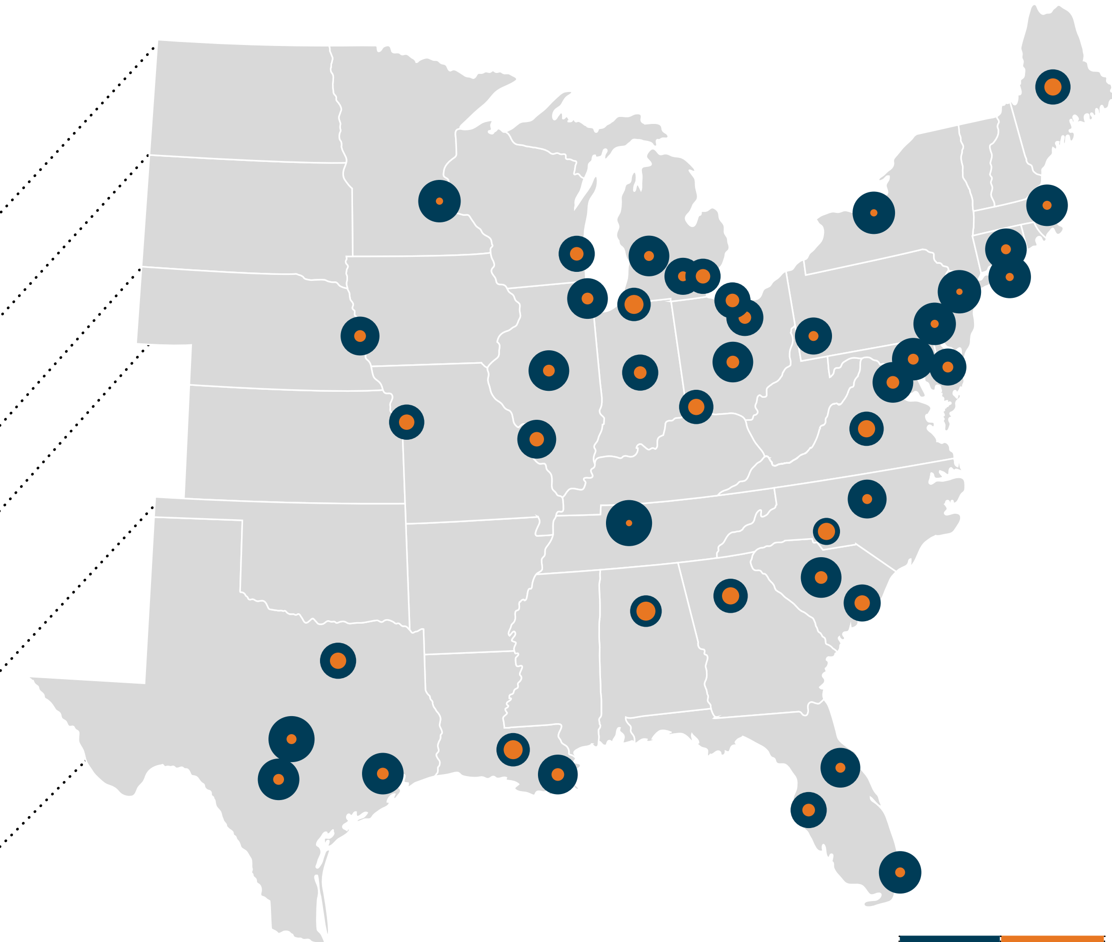


This year, instead of issues of convenience and time, the top reasons consumers report delaying care are "I don't want to risk getting COVID-19 or exposing someone in my household to it" and "I don't think it's safe to go to a hospital during the COVID-19 pandemic." Fear of exposure to the virus, along with concerns about being a "burden" to the healthcare system, are preventing people from getting care. While these are quintessentially 2020 problems, this remains a concerning increase of an already unsettling trend.

Vaccine openness across the U.S.

Key to our collective fight against the pandemic (and the care delays it causes) is vaccine adoption across the country. At the end of 2020, consumer openness to taking the COVID-19 vaccine varied widely across communities. Healthcare leaders need to consider these regional nuances, especially if you are attempting to communicate with and engage people across communities without adjusting your approach, communications, and messaging.





INTEND TO GET VACCINE

	...Within One Month of Availability	...Never	Net Score (Within a month - Never)
San Francisco	53%	7%	46%
Salt Lake City	52%	8%	44%
Austin	51%	11%	40%
Nashville	51%	7%	43%
Seattle/Washington	50%	10%	40%
Portland	49%	12%	36%
New Jersey	48%	7%	40%
San Diego	47%	10%	38%
Minneapolis and Rochester	47%	8%	39%
Philadelphia	47%	9%	38%
Orange High Desert	47%	10%	37%
Albuquerque	47%	11%	36%
Miami	47%	11%	36%
New York	47%	9%	38%
Los Angeles	47%	11%	36%
Baltimore	47%	12%	35%
Boston	46%	10%	36%
Denver	46%	11%	35%
San Antonio	46%	12%	34%
Houston	46%	13%	33%
New Haven	46%	11%	35%
Grand Rapids	45%	11%	34%
Washington, D.C.	45%	14%	31%
Illinois	45%	13%	32%
Chicago	45%	13%	32%
Columbia	45%	14%	31%
Columbus	45%	14%	30%
Orlando	44%	11%	34%
Las Vegas	44%	14%	30%
Phoenix	44%	15%	29%
New Orleans	44%	14%	30%
Raleigh-Durham	43%	11%	33%
Omaha	43%	13%	30%
St. Louis	43%	16%	27%
Boise	42%	17%	25%
Delmarva Peninsula	41%	12%	29%
Akron	41%	14%	27%
Ann Arbor	41%	11%	30%
Pittsburgh	41%	11%	30%
South Carolina	41%	17%	23%
Cleveland	40%	15%	26%
Indianapolis	40%	14%	26%
Dallas	40%	18%	22%
Tampa	40%	14%	26%
Milwaukee	40%	15%	24%
Kansas City	39%	17%	22%
Detroit	39%	16%	22%
Maine	39%	19%	20%
Atlanta	38%	19%	19%
Cincinnati	38%	18%	20%
Virginia	38%	19%	18%
South Bend	37%	21%	16%
Baton Rouge	37%	21%	15%
Birmingham	35%	21%	14%
Charlotte	30%	19%	11%

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Chapter

04

Deepening Trust

Trust—and often the lack of it—has been a leading topic since the onset of the pandemic. Debates around truths and falsehoods have been in the headlines across the nation, and misinformation has run rampant. Public disputes and conflicting messages about the virus have led to a sense of national uncertainty about what, and who, can be trusted.

Even in the best of times, trust is a multi-faceted, complex concept. It can be challenging to earn in the first place and even harder to earn back when it's been lost. It cannot be messaged into existence or established overnight—instead, brands must be working toward it constantly through proven consistency and clear commitment over time.

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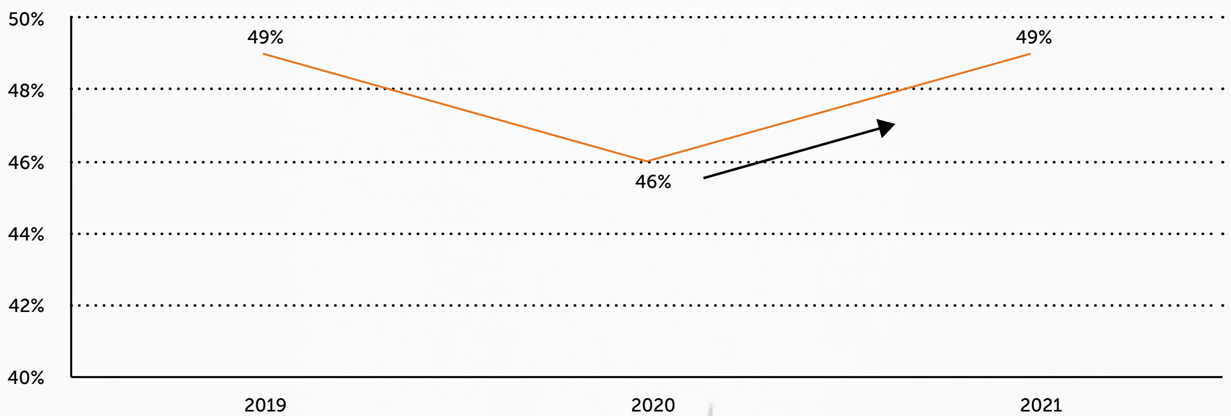
2019–2021 U.S. TRUST OF HEALTHCARE PROVIDERS

“I [do] always trust my healthcare provider to make the right decisions for me”



Fortunately for healthcare brands, data actually shows a minor uptick in trust across consumer groups over the past year. It’s a small but meaningful recovery from the decline seen from 2019 to 2020. This tells us that amidst the uncertainty and fear of the pandemic, consumers put more faith in healthcare brands than they did prior to its onset. Though individuals’ engagement in their own health and wellness has declined, they are now listening to you more than before.

What do you want to say to them?

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Top 10 Most Trusted Brands

Rank	Brand
1	Johns Hopkins Medicine
2	UNC Health
3	Massachusetts General Hospital
4	The Ohio State University Wexner Medical Center
5	Nebraska Medicine
6	Baptist Health South Florida
7	Stanford Healthcare
8	Mayo Clinic
9	Memorial Healthcare System
10	Emory Healthcare

Some brands have done a great job building trust during a challenging year. Here are the top ten most trusted brands from this year’s study.

Based on net score for the statement: ‘Is an organization that people trust’

"Healthcare organizations should focus on educating patients as to why they are recommending certain treatment methods and consider alternative methods as a possibility (such as naturopathic supplementation)."

– Consumer

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When we dig deeper with consumers qualitatively about trust, consumer comments indicate that many people already believe their healthcare system is trustworthy. However, there are three trust-boosting strategies that brands can utilize to maintain this upward trend and increase trust further:

1. Offer choices:

Consumers crave a sense of control and choice when it comes to their health and care, and they trust healthcare providers that consider alternative methods (holistic or naturopathic solutions, for example) as a possibility.

"I would trust my provider more if they suggested second opinions and holistic or naturopathic approaches as alternate solutions."

2. Be transparent:

Healthcare decisions can be overwhelming and confusing for consumers. The more transparent, clear, and informative healthcare providers can be, the more consumers will trust their word and actions.

"Healthcare organizations need to be more transparent and provide their patients with more information when providing care or other medical services."

3. Listen:

Trust is a conversation. Consumers want to be involved in their health and care, and they need a voice at the table. Listening, understanding, and empathy are essential to building trust.

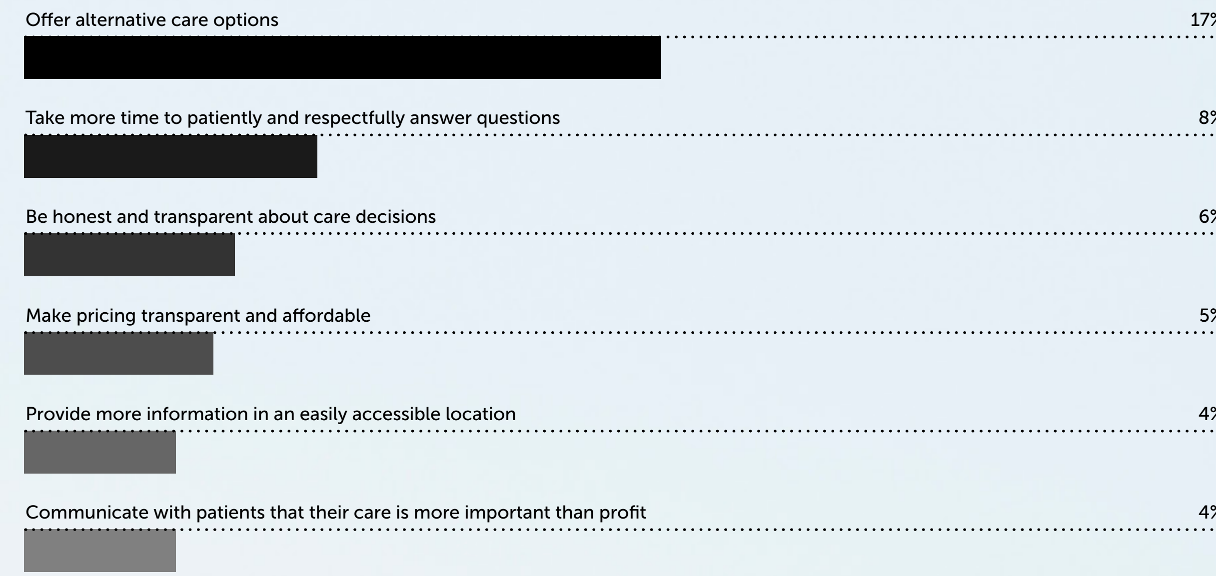
"I would trust my provider more if they would get better at just listening to me and honoring my wishes, rather than being so concerned about their own paycheck. They treat you like a number rather than a person; it doesn't feel like they care about you or what you're going through, just about getting you out as fast as possible."

For John Hopkins Medicine, the most trusted brand in this year's study, building trust through transparency and clarity has been the centerpiece of just about every action the organization has taken during the past year. With a focus on the questions that were top of mind for consumers across the country, John Hopkins created a Coronavirus Resource Center and National Dashboard to keep people and the medical community informed about the latest developments. This public service, offered by a brand that already had a strong reputation, boosted trust and brand strength during a year when many struggled.

Building trust through optionality

Consumers crave choice, and offering a variety of options (instead of a single, standardized response) is key to building trust. Having access to choices helps consumers feel involved with their health, whether it's care or treatment-related, choosing which channel (virtual, in-person, text message, email, etc.), or being able to select their own provider. For maximum trust, healthcare providers must not only provide options, they must spend time transparently discussing them with patients and respectfully answering any questions that arise.

ORGANIZATIONAL STEPS TO IMPROVE TRUST



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Chapter

05

Unwavering Hearts and Minds

Listen up, brand leaders, because this is important. Despite the chaos and upheaval of this year, the disruption to our personal and professional lives, the declines in health engagement, the fear that has caused care delays, and the shifts in trust, **the fundamental human needs from healthcare remain the same**.

How consumers “think” and “feel” when making decisions about healthcare brands has not changed—it is only what they “do” with us that has shifted in a COVID-19 world. Looking at the year-over-year data around the importance of each of the attributes in driving choice and advocacy, we can see they’ve hardly moved.

EMOTIONAL DRIVERS

People are hungry to build an emotional connection with healthcare brands—these attributes chart the course.

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2020 vs. 2021 Emotional Attributes

	2020 Derived Importance Rank*	2021 Derived Importance Rank*
Security Gives me reassurance that they will be there for me when I need them	1	1
Freedom Makes me feel like I have options when it comes to my healthcare	3	2
Confidence Gives me confidence in my long-term health and wellness	2	3
Individualization Makes me feel like the top priority when I'm getting care	5	4
Wellbeing Gives me a stress-free healthcare experience	4	5
Success Helps me live a good quality of life	6	6
Self-Actualization Helps and encourages me to be the healthy person I want to be	7	7
Belonging Makes me feel like I'm not the only one going through this	8	8
Excitement Celebrates my important milestones and outcomes (birth of a child, becoming cancer-free, etc.)	9	9

*Derived importance score and rank based on Shapley Value Regression

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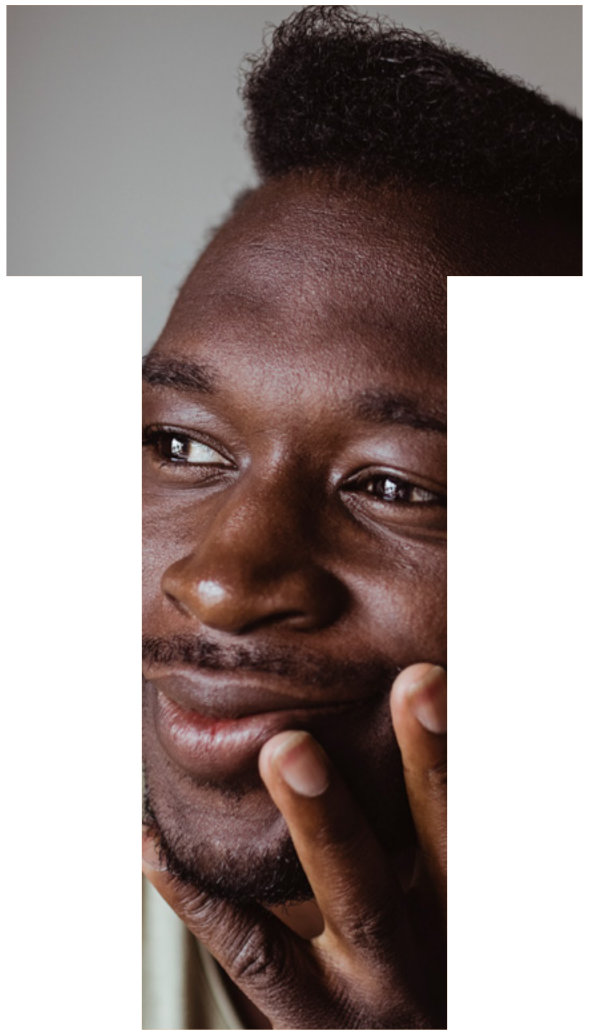

INTELLECTUAL DRIVERS

The bread and butter for healthcare brands still matters; you just have to make sure you think beyond these drivers, as definitions (and people's understanding) of them are expanding.

2020 vs. 2021 Intellectual Attributes

	2020 Derived Importance Rank*	2021 Derived Importance Rank*
Best People Has the best people	1	1
Convenience and Ease Makes it quick and easy to get the care people need	3	2
Quality Outcomes Provides the best medical outcomes for people	2	3
Empathy Demonstrates empathy and compassion in every aspect of care	4	4
Personalization Provides individualized care specific to a person's unique needs	7	5
Transparency Sets clear expectations with people about what's happening and what's next	6	6
Coordination Helps people navigate care across facilities and physicians	5	7
Innovation Offers the latest medical treatments and technologies	8	8
Wellness Offers wellness programs and preventative care	9	9
Systemness Is a healthcare system where doctors, hospitals, and clinics are all part of the same organization	10	10
Academic Medicine Conducts medical research and clinical trials	11	11

*Derived importance score and rank based on Shapley Value Regression

SENSORIAL DRIVERS

Brand-building starts with the senses—what consumers see, hear, and smell creates their first impression.

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2020 vs. 2021 Sensorial Attributes

	2020 Derived Importance Rank*	2021 Derived Importance Rank*
Buzz People I am close to say positive things about them	1	1
Environment Has environments and physical spaces that appeal to me	2	2
Herd Behavior I see others I am close to using their services	4	3
Aesthetics Is visually pleasing to look at	5	4
Attraction Appeals to my senses	3	5
Impression Makes a strong impression on my senses	8	6
Intrigue I find the brand interesting in a sensory way	7	7
Volume I see and hear a lot about this brand	13	8
Sounds I associate positive sounds/music with them	6	9
Smells I associate pleasant smells/scents with them	9	10
Owned I often see their brand's logo on buildings, signs, vehicles, uniforms, etc.	11	11
Prevalence I sense the brand all around me	10	12
Visibility I see this brand everywhere	12	13
Paid I often see advertising from them	15	14
Earned I often see them on social media and in the news	14	15

*Derived importance score and rank based on Shapley Value Regression

B

Wondering where the comparison of the 2020 vs. 2021 data is for the all-important Behavioral dimension? Wait until Chapter 7. Or jump there now for a sneak peek.

JUMP

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This consistency is essential to keep in mind as you make plans to pivot and adapt your brand to meet the current moment.

While it might feel like COVID-19 has changed *everything* when it comes to health and care, it hasn't impacted the core of what it means to deliver human brand experiences in the category. In fact, there has never been a more important time to stay true to your humanizing brand strategy, purpose, and positioning. Don't be fooled into making a quick fix as a reaction to COVID-19—if you were doing the work to humanize your brand pre-pandemic, those actions, values, and commitments continue to be just as essential today.

With so much at stake, it's time for healthcare brands to double down on ensuring every experience, effort, and message ties back to a single, unifying brand positioning. This is what will rally your employees and teams and what will define your consumers' experiences. Put yourself to the test right now: can you answer what that brand idea is across *your* organization? What about if you asked ten other people, across different teams and departments, to tell you what it is? Would they all say the same thing? Or would their responses vary and diverge?

If you or your people are unable to clearly and meaningfully report what *exactly* your brand is all about, it's time to get to work. We know this is adding another thing to your plate during an already busy year. But it's truly never been more important. And remember, we're not talking about running a new ad campaign. Brand goes deeper than that.

What you should be focused on at this time is the heart of your organization—the core of what you care about and what impact you want to make on the world. Get that right, and the rest will fall into place.

Ingredients for a powerful brand positioning

There are many approaches to defining a best-in-class brand positioning most focused on relevance, differentiation, authenticity, and stretchiness. Today's world requires that our criteria go a level deeper to ensure that we can make the right impact on the audiences with whom we hope to engage and build deep relationships:

- **Connects** to and serves a core human desire or need, both within (internal employee culture) and without (consumer, patient experience) the organization–this is next-level authenticity as it ties to fundamentals of our humanity
- **Inspires** an ecosystem of opportunities through which internal and external audiences can achieve or become something bigger or more elevated (think Nike enabling you to find the athlete within)—this is future-proofing for the brand and the enterprise
- **Empowers** people to convey a shared value or meaning in their choice and use of the brand—this is badging but with reciprocity in mind—this is about brand as community-builder
- **Establishes** salience within a societal context such that the brand can simultaneously serve the needs of the individual but also orients itself to delivering benefits for the collective—this is about taking an elevated role within the category or industry

Permission to pivot

COVID-related messaging matters, but the data shows that people are still looking for healthcare brands to tell a broader story. In fact, most consumers are "equally interested in receiving information both about COVID-19 and other healthcare services." This is your permission slip to move beyond COVID-focused stories in your brand communications. While addressing the pandemic, the vaccine, and public health measures is essential, your consumers are still hungry for a balanced point of view—and changing up your messaging may even help re-engage them with the category.

2021 COMMUNICATION PREFERENCES FROM HEALTHCARE ORGANIZATIONS

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Chapter

06

Emotional Security

After a tumultuous and frightening year, what matters most to consumers won't be a surprise: Security remains the number-one most important emotional attribute for healthcare brands to deliver.

This desire for Security was intensified by COVID-19, and consumers turned to healthcare providers for reassurance, guidance, and support. At a time when emotions have been running at an all-time high across both personal and professional landscapes, it's unsurprising that the single, most influential emotional factor in future choice and advocacy remains whether a brand can deliver reassurance that they will "be there for me when I need them." But what does delivering that sense of reassurance entail in today's new world?

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The two greatest factors that deliver a sense of security and reassurance to consumers are personalized, respectful communication and provider availability. People want their healthcare provider to proactively communicate with them in an empathetic manner that demonstrates they are valued. More important, this communication shouldn't be a form letter or a mass email. Security-creating communication is personalized and compassionate and opens a two-way dialogue in which consumers feel both heard and understood.

"Healthcare organizations can be more assuring by texting, calling, or emailing at least on a bi-weekly basis, to send personalized messages and reminders. The messages could be reminders about getting the flu vaccine, colon cancer screening, breast exams, etc."

– Consumer

Provider accessibility is also essential to delivering a sense of security. In order to assure people that you will be there for them, you actually have to be there. Consumers want to feel that they can get in touch with their care providers whenever they need to, with ample opportunities to connect, engage, and converse directly with their doctor.

"I understand why this is a challenge, but I would like to see more doctor-to-patient communication. Usually, I can only speak to a nurse (after I have called in with a health concern) who tells me what the doctor advised in regards to my health concerns. It would be much more reassuring to be able to talk with my doctor without the extra middlemen."

– Consumer

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"I think healthcare organizations would benefit greatly from listening to patients more. I've been in the situation many times where I don't feel listened to or I feel like my symptoms are being brushed aside. I also think the level of compassion needs adjustment. I always feel like nobody there actually wants to help me; I feel like an annoyance that they just want to get rid of as quick as possible."

– Consumer

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Security-building specifics

Want to improve how your brand performs on this critical attribute? Here are three immediate, reassurance-delivering actions to make it happen, straight from your consumers.

1. Actively reach out

Consumers are looking to you to start a dialogue. Find ways (and reasons) to connect, follow up, and follow through with your patients to reassure them that they are valued and their health is top of mind.

2. Improve bedside manner

That provider-training effort you've been putting off? Book it ASAP. That employee engagement program to help ensure that you're delivering on brand interactions at the bedside? Start mapping it out today. Bedside manner is essential to delivering security to your consumers.

3. Answer every question

Responsiveness is a key to reassurance. Make sure your team knows to never let a query go unanswered and to always close out patient interactions with an opportunity for any final questions or conversations.

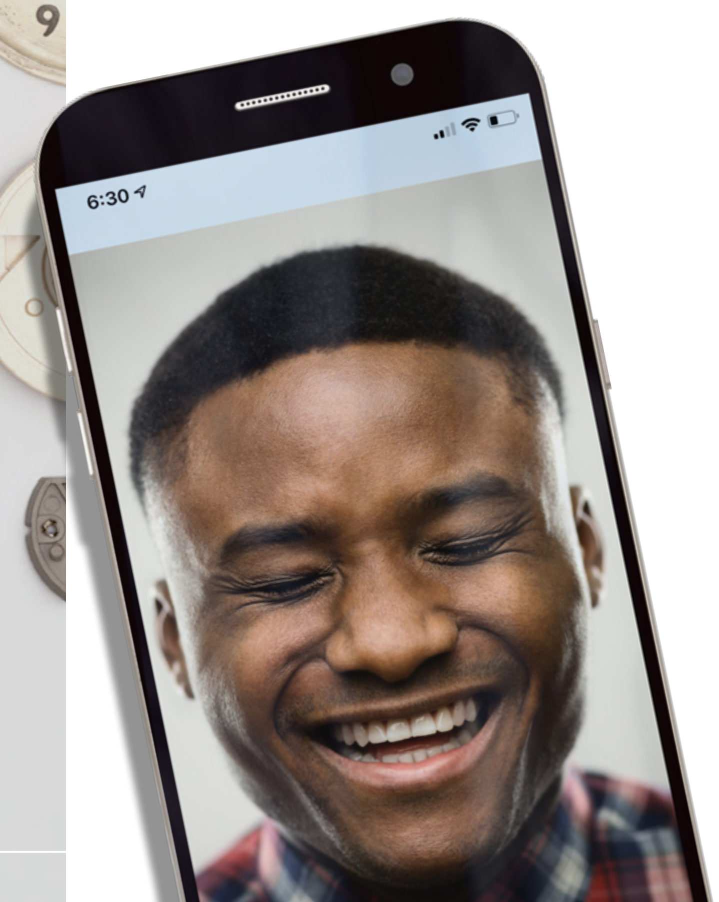
This is the reassurance playbook that you can start tomorrow.

Chapter

07

Virtual Behaviors

Earlier, we celebrated the pace at which many healthcare organizations implemented big shifts to their digital experiences. Many of you took giant leaps ahead into the telehealth world, in very short timelines and under immense pressure. And for good reason. Not only was going virtual essential to care during COVID-19, it is also the way of the future.



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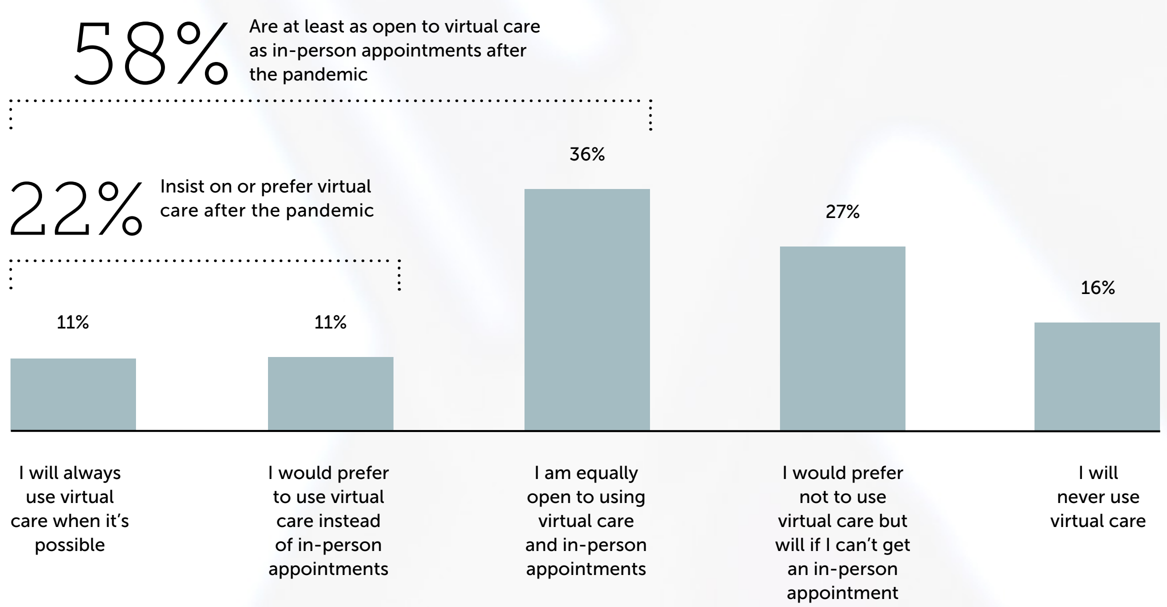
This year's data, in addition to ongoing pulse research conducted via ad hoc studies for our clients, indicates that digital points of access and virtual interactions are likely to make up a huge proportion of future volume across service lines and specialties.

2021 PREFERENCE FOR VIRTUAL CARE VS. IN-PERSON CARE POST-COVID-19



Data collected via Monigle's Humanizing Brands Collective

It's not difficult to see why virtual care has the opportunity to stick in a post-pandemic world. The benefits specifically address gaps in healthcare that we have been trying to close for years.

80% AGREE
I appreciate that virtual care can save me time

78% AGREE
Virtual care gives me peace of mind because I'm limiting my exposure to germs

72% AGREE
Virtual care gives me peace of mind because I'm limiting others' exposure to my own germs

72% AGREE
Virtual care reduces my stress because I don't have to hassle with driving, parking, finding the office, etc.

63% AGREE
Virtual care is much easier than an in-person appointment

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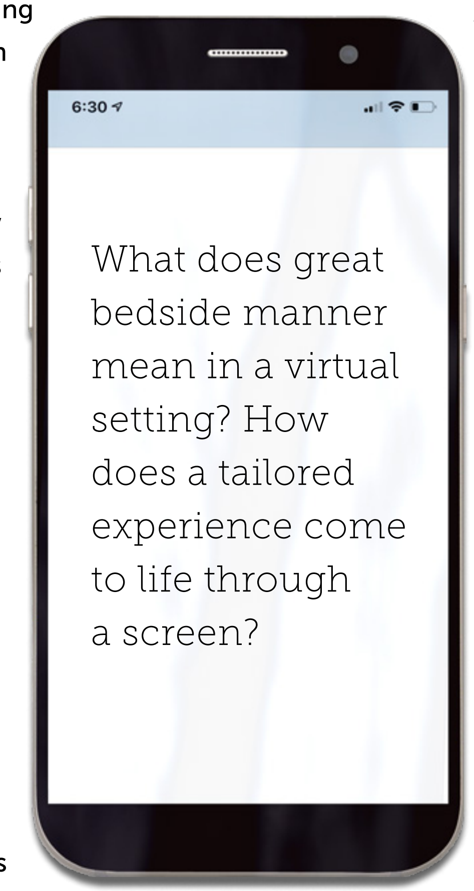
Such a significant shift into telehealth creates new questions and challenges for healthcare brands, requiring many to start from scratch when it comes to delivering the right experiences. What do people want from digital interactions? How do we identify the various points of convergence and divergence between digital and physical experiences? These are the questions that will require our attention. As an industry, we will have to rethink facets of the experience that we hadn't quite gotten right in the first place, even after years and years of trying. For example—what does great bedside manner mean in a virtual setting? How does a tailored experience come to life through a screen? How do we deal with idle and wait times? How can we give consumers a sense of choice, freedom, and control across a seamless digital landscape?



When you look across the shift in importance of the behavioral attributes, the few that moved in terms of an increase in importance each have a relationship to our emerging virtual care world. The expectations have been elevated when it comes to easily connecting and making appointments with healthcare brands. The importance of having the best digital tools jumped up by 8 spots. Same for website. This is our new normal in healthcare—this is the scorecard that consumers will be using to evaluate us. Do your experiences stack up to these changing expectations?

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BEHAVIORAL DRIVERS

More than what people think or feel about your brand, it's what the brand does that builds engagement.

2020 vs. 2021 Behavioral Attributes

	2020 Derived Importance Rank*	2021 Derived Importance Rank*
Interactivity My interactions with them are always positive	2	1
Enhancement Makes my life better	1	2
Stress-Free Makes hospital/doctor visits less stressful	4	3
Contactability Makes it easy for me to contact them	7	▲ 4
Navigation Makes it easy to get the information I need	5	5
Availability Makes it easy to get an appointment	11	▲ 6
Transformation Changes my health behaviors in a positive way	3	7
Dynamism Is action-oriented	9	8
Subscription I would happily sign up to receive email newsletters/updates from them	10	9
Digital Tools Has really good digital tools	18	▲ 10
Website Has a really good website	19	▲ 11
Attendance I would happily attend event and activities organized by them	6	12
Continuity I enjoy interacting with them on a regular basis	8	13
Distinction Offers experiences that no other health organization does	16	14
Participation I like to stay involved with them even when I'm healthy	12	15
Patronage I would happily donate my time or money to support them	13	16
Follow I would happily follow them on social media	15	17
Exertion I go out of my way to interact with them	14	18
Stimulation Offers experiences that get me excited	17	19

*Derived importance score and rank based on Shapley Value Regression

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Standout experiences will clearly pinpoint, define, and implement behavior changes in care providers so that digital experiences still feel individualized, comforting, and empathetic. Leaders will have to rethink the digital touchpoints and spaces where consumers experience their virtual interactions. Content and approaches to engagement will be just as essential in a virtual waiting room as they were in person.

Journey mapping will take on a new significance as healthcare brands strive to innovate and stand out in this new age—a space where physical and virtual interactions have to converge seamlessly. Mapping a consumer's digital experience, from start to finish, will help brands understand the emotional, intellectual, and sensory context of every touchpoint and step in the journey. With those insights in mind, they can craft human brand experiences fit for virtual spaces.

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There is a valuable lesson for healthcare brand leaders in this. When push comes to shove, our industry can move quickly, pivot, and adapt. We can try new approaches and implement new strategies without years of discussion, planning, and committee debate. And when it comes to making sure consumers have access to healthcare, we will do whatever it takes. We did it with virtual care and telehealth. Now, what other humanizing experience changes can we quickly make happen—not years from now, but today?

Pre-pandemic, virtual care was already on the horizon. But many brands assumed and planned for multiple years of preparation and transitions to digital care experiences, accounting for the traditional conservative and slow-moving pace of the industry. However, when the pressure rose this year, healthcare brands were able to make it work within just a few weeks. We realize that sometimes these solutions were put together with duct tape, as one of our clients described to us, but this represented a starting point. A shift. A leap forward.

2021 top 10 brands with the best digital tools in the U.S.

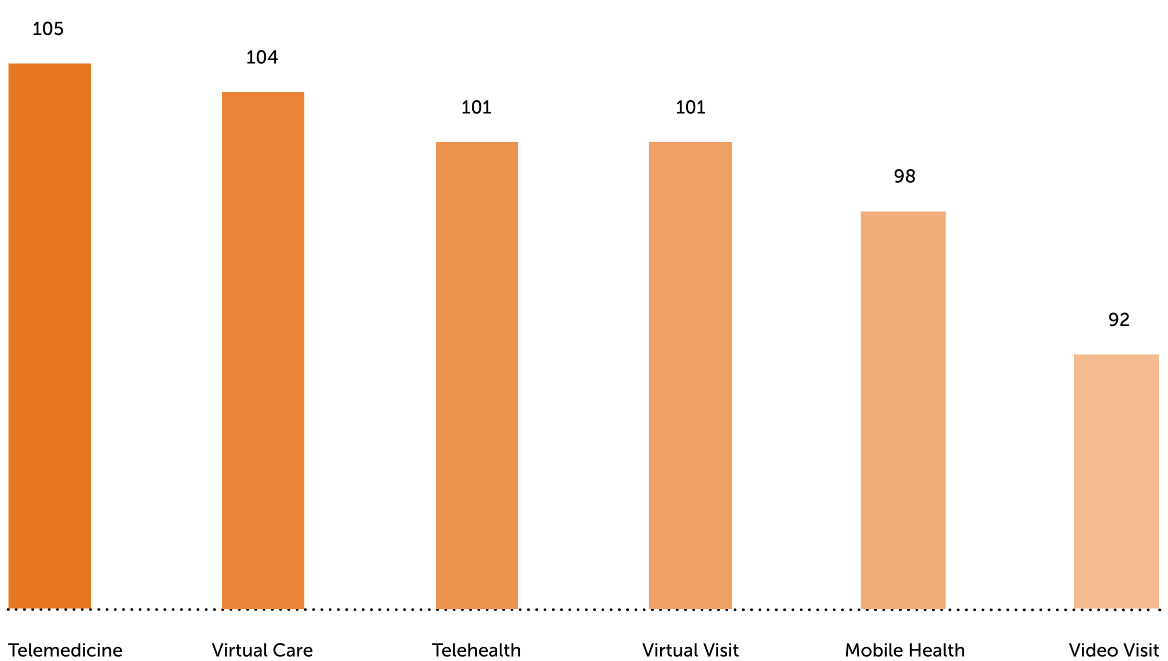
Rank	Brand
1	Hale Health
2	Heal
3	Zipnosis
4	Maven
5	CVS HealthHub
6	Kindbody
7	Parsley Health
8	One Medical
9	SnapMD
10	Forward

During the past year, several brands stood out and led the way with digital tools and experiences. The usual suspects aren't on the list to the left; some listed don't even deliver care themselves. Whether they are in care delivery or facilitating the care delivery of others through software solutions, these brands are getting credit for being the best at digital tools and experiences. If we took the digital-first mindset, what could we learn in order to accelerate our own growth?

Based on net score for the statement: "has really good digital tools"

What's in a name? As organizations have moved quickly to level up their virtual experiences, the language used to describe these offerings has been haphazard. Telemedicine, virtual care, telehealth—these terms and more have all been used to say the same thing. For those within the industry, using these names interchangeably doesn't confuse anyone. Consumers are a different story. Our research shows that all names are not created equal. For example, telemedicine and virtual care have more standalone equity with consumers, while terms like video visit have less. In addition, each individual term has a unique values association, suggesting that one may be a better fit for your brand positioning than another. Consider exploring nomenclature options and landing on one consistent expression that aligns with your desired brand experience.

2021 U.S. TELEHEALTH NOMENCLATURE EQUITY INDEX



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2021 U.S. TELEHEALTH NOMENCLATURE VALUE ASSOCIATION

	Telemedicine	Virtual Care	Telehealth	Virtual Visit	Video Visit	Mobile Health
Accessible	1	0	-1	-2	-5	7
Advanced	1	2	2	1	-4	-3
Caring	-1	1	0	0	-3	4
Convenient	3	2	-4	1	-2	-1
Easy	-1	-3	-1	2	4	-2
Fast	4	0	-4	0	-4	3
Helpful	2	-1	1	1	-5	2
Innovative	1	4	4	2	-4	-7
Knowledgeable	1	1	0	1	-2	-1
Modern	1	0	1	2	1	-4
Pioneering	4	1	-3	0	-2	0
Safe	-2	5	-3	8	4	-12
Scientific	0	-1	5	-2	-2	0

Telemedicine: Conveys *fast*, *pioneering*, and *convenient*, while underperforming slightly on *safety*

Virtual care: Conveys *safety* and *innovative*, while underperforming on *ease*

Telehealth: Conveys *scientific* and *innovative*, but lags behind in *convenience* and *speed*

Virtual visit: Leads in *safety*, though slightly underperforms on *accessibility*

Video visit: Conveys *ease* and *safety*, but lags in other spaces, including *accessibility* and *helpfulness*

Mobile health: Leads in *accessibility*, but falls far behind on *safety* and *innovation*

Data: Gap analysis showing telehealth nomenclature value association relative to the average value association score across all nomenclature tested based on selection frequency

Chapter

08

Innovation Defined

You'll find the desire to be "innovative" baked somewhere in most healthcare organizations' brands. Physicians in particular often call for their organizations to focus on this attribute in a specific way. Yet actually delivering on this idea remains a stumbling block for many brand experiences.

Overall, the importance of Innovation has not changed year over year—it is still the 8th most important Intellectual attribute in terms of driving choice and advocacy. Despite its lower importance, it is still a hotly debated topic across many healthcare brands. Combine this energy and focus with a shifting definition in the minds of consumers, and it becomes something worth a second look.

For years, the idea of innovation conjured mental images of cutting-edge technology, doctors tapping away at iPads, robotic surgical assistance, and gleaming, spaceship-esque diagnostic equipment. However, are these things truly what define innovation today?

While the latest medical treatments and technologies are essential outcomes of innovation, they are not the sole context of its definition. If you want your healthcare brand to be known for innovation, you must embrace the holistic, human facets as fiercely as the technological ones. Today's innovators recognize that it's not just about the tools, it's about doing things differently and being unafraid to break convention to deliver an improved experience for people.

What this means is that, instead of focusing all of your marketing and messaging efforts into talking about the new robot in a clinic, you should really be focusing on how your brand is putting that robot to work on a deeply human level. At the end of the day, the robot alone won't drive choice, advocacy, and loyalty—but getting real with your patients and providing the security, personalization, and sense of freedom they crave absolutely does.

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Here's what consumers had to say.

Technology that meets human needs

"Innovation means the ability for a system to be flexible and use technology to meet the needs of patients. This includes telemedicine and robotic surgery, among other offerings."

Having the best people

"An innovative care organization would be one that has all the best doctors that cover all aspects of healthcare from minor injuries to major health issues. The healthcare organization would have to employ all the necessary experts in their field to treat any illness."

Personalized care

"Innovative healthcare looks like a team of people that makes me feel like I'm the most important person in the facility when they're treating me for any ailment. It has the latest and greatest technology and keeps me involved in my care plan, but most importantly uses proper bedside manner."

Holistic approaches

"An innovative healthcare organization would do much more to coordinate patient care across specialties. It would look holistically at the body, especially for those with chronic conditions, enabling these patients to seamlessly organize their treatments."

Affordable care for all

"Healthcare could be innovative by providing care at lower cost by reforming healthcare to socialized medicine."

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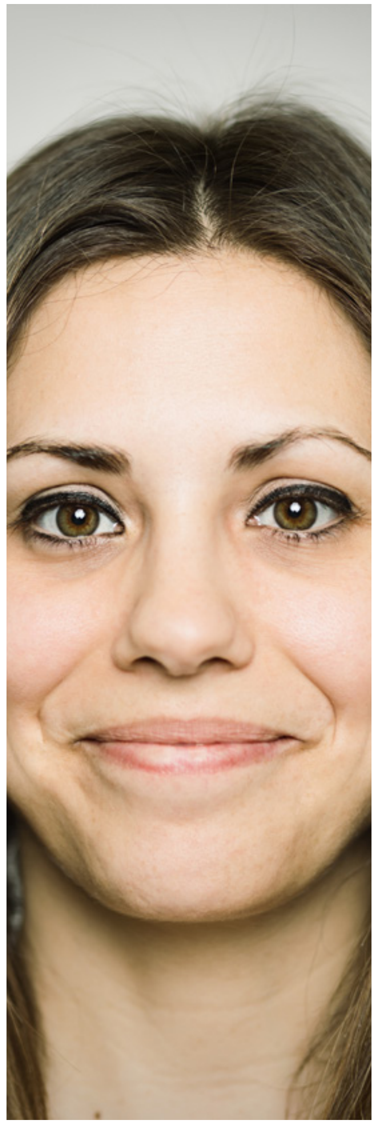
Understanding the person behind the patient







Catching up with our segments

In order to create meaningful, human-centered brand experiences for consumers, we need to understand who they are. That means looking beyond just demographics and focusing on the deeper stuff that defines how individuals approach their health and care. We used latent cluster analysis to break down the U.S. healthcare-consumer population into seven distinct segments, each with their own unique attitudes and behaviors.

This year brought shifts in the population makeup, with certain segments increasing and decreasing in size and significance. Holistic Health Seekers continued to grow in size, while Wellness Influencers', Time-Pressed Parents', and Habitual Strugglers' numbers dropped. COVID-19 likely played a role in these shifts as evidenced by the segment that increased most of all this year—Doctor Dodgers—as people were more inclined than ever before to avoid seeking the care they need. As we look forward, it will be essential for healthcare leaders to understand the breakdown of these segments in their markets and to keep tabs on their shifting size, significance, and attitudes in the post-pandemic era.

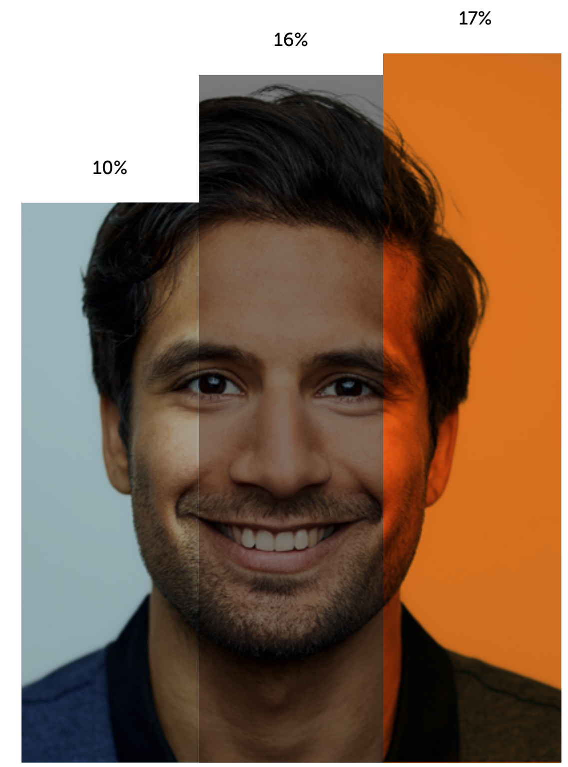
Trusting Traditionalists:

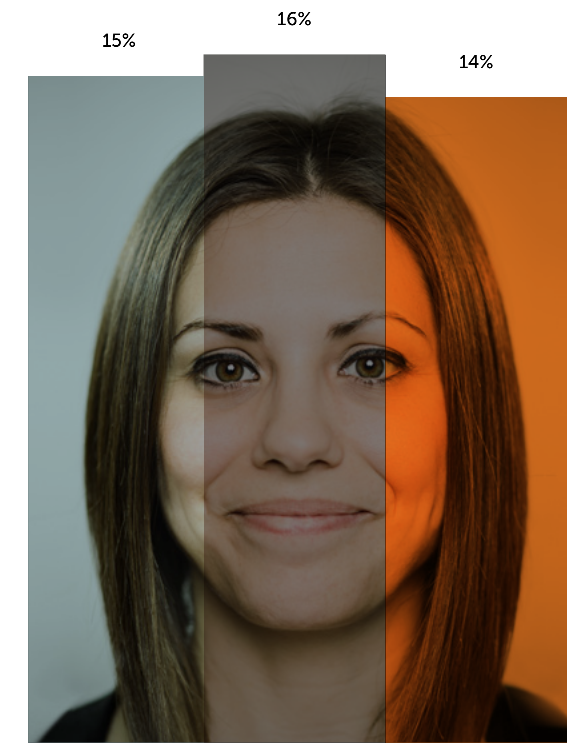
Increased 1%

This low-effort segment prefers a classic approach to health and care. They aren't necessarily proactive about exercising or eating healthier, but they will take flu shots and over-the-counter supplements. These traditionalists are the most trusting of healthcare providers, and they value having a strong relationship with their personal doctor. Out of all the segments, they attach the highest importance to having the best people.

2019–2021 SEGMENT SIZE WITHIN U.S. HEALTHCARE CONSUMER POPULATION

2019 2020 2021





Holistic Health Seekers:

Increased 1%, after a huge jump from 2019–2020

This group cares deeply about health and self-care, but they turn to traditional healthcare providers only as a last resort. Instead, this segment prefers to first try new approaches and alternative methods. When they do seek traditional care, they are interested in academic medicine, innovation, and best outcomes. Winning their loyalty pays off: this higher-income group is extremely likely to donate to care providers they deem worthy.

Time-Pressed Parents:

Decreased 2%

Members of this segment are health-conscious, but their children always come first. They are likely to delay care based on concerns about cost, time, and convenience. They don't trust healthcare providers to be the sole decision-maker—instead, they prefer to do their own research and keep themselves informed. They are drawn to technology that makes their busy lives easier.

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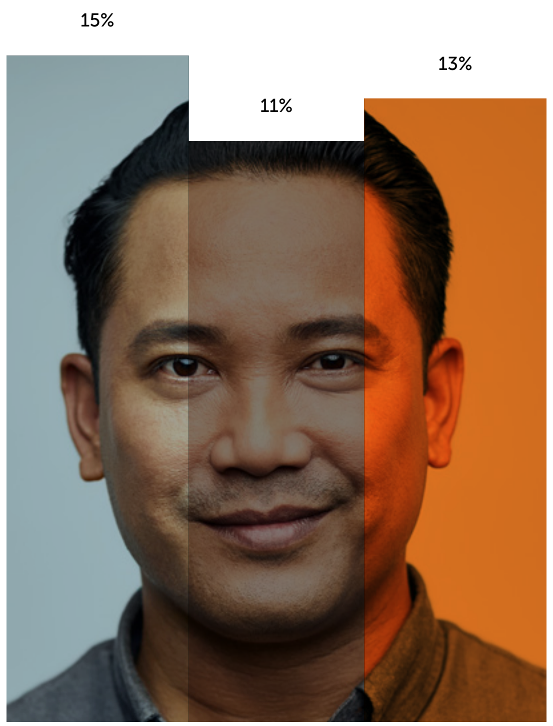
2019–2021 SEGMENT SIZE WITHIN U.S. HEALTHCARE CONSUMER POPULATION

2019 2020 2021



Health-Fortunate:

Increased 3%

These lucky folks are generally healthy and only rarely seek out care. Good health comes easily to them, so they don't feel a need to be particularly health-conscious or proactive about their care. When they do need care, they trust their provider and feel peace of mind working with experts. They care about quality outcomes, convenience, ease, and personalization—but they also care about enjoying life and having fun.

Wellness Influencers:

Decreased 2%

This highly engaged and informed group is always the first to know about the latest trends in health and wellness. They are passionate about self-care and healthy lifestyles and can afford premier private health services (yoga classes, acupuncture, nutritionists, etc.). They value their own decision-making and are not inclined to seek preventive care and wellness services through traditional providers. When they do seek care, they value best outcomes, innovation, and personalization.

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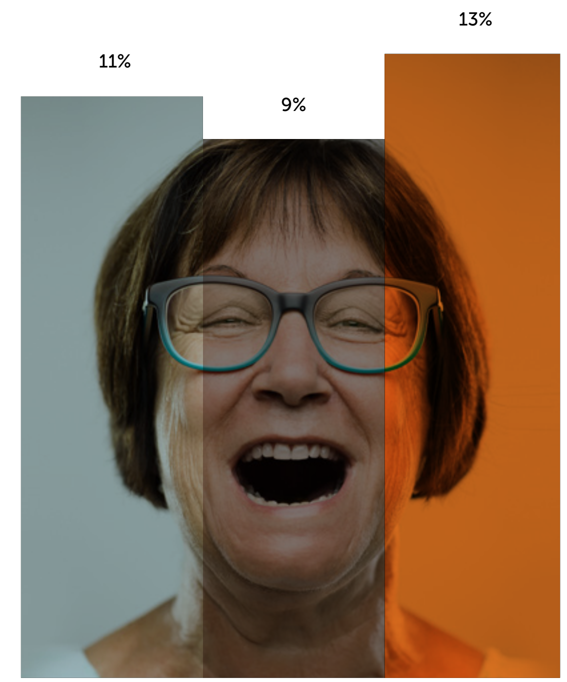

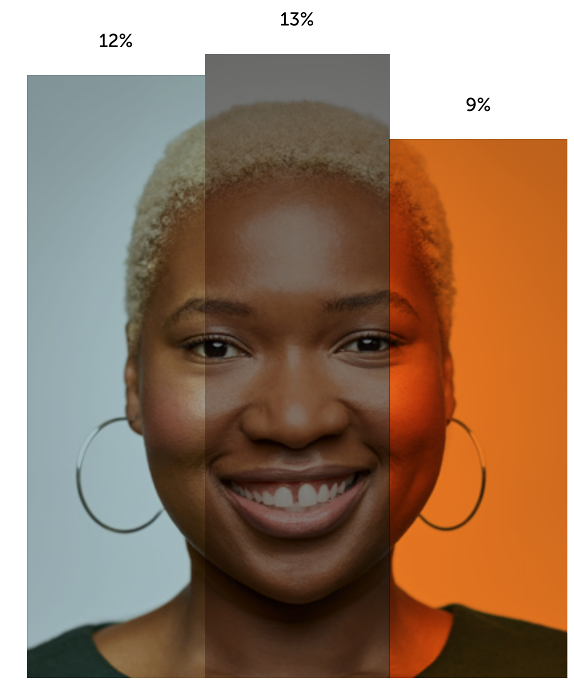

Doctor Dodgers:

Increased 4%

This segment avoids care at the best of times due to cost, time, and stress—and 2020 solidified their care-delaying behavior. Unless members of this group are very sick or injured, they won't seek care. They struggle to pay medical bills and fit care into their lives. They are drawn to stress-free and easy experiences and value wellness and preventive care programs offered by care providers more than other segments.

Habitual Strugglers:

Decreased 4%

This segment is engaged with healthcare, but they struggle to make lasting lifestyle changes. Caring for their health is overwhelming for them, and they find navigating the healthcare system challenging—despite the fact that many are managing chronic conditions. This group needs a little more hand-holding and support, and they want an advocate to help guide them through the clutter. They are interested in consuming health-related information, and they are open to and trusting of all care options.

Distribution of Segments by Market

Find your market here to better understand your consumer populations from a behavioral and attitudinal perspective. As you consider getting deeper into the mindsets of your audiences and the opportunities to be more and more targeted in your messaging and communications approaches, this insight should provide you with opportunities for bigger impact. Does your system work across markets? Combine the snapshots below to see how you can leverage scale across geographies to be more efficient.

	Trusting Traditionalists	Health-Fortunate	Time-Pressed Parents	Wellness Influencers	Habitual Strugglers	Doctor Dodgers	Holistic Health Seekers
Akron	18%	10%	19%	16%	9%	13%	15%
Albuquerque	19%	12%	18%	14%	8%	18%	11%
Ann Arbor	14%	13%	18%	16%	10%	8%	22%
Atlanta	13%	11%	12%	19%	9%	11%	26%
Austin	13%	13%	16%	20%	8%	6%	23%
Baltimore	21%	13%	17%	16%	8%	10%	14%
Baton Rouge	19%	12%	17%	16%	10%	8%	19%
Birmingham	15%	14%	20%	17%	11%	5%	18%
Boise	22%	13%	21%	14%	9%	12%	10%
Boston	18%	16%	14%	17%	9%	8%	17%
Charlotte	16%	13%	16%	21%	7%	12%	16%
Chicago	18%	12%	19%	18%	8%	8%	17%
Cincinnati	18%	13%	19%	17%	9%	13%	12%
Cleveland	19%	11%	17%	14%	11%	12%	16%
Columbia	24%	13%	17%	18%	7%	15%	5%
Columbus	12%	10%	23%	19%	11%	7%	19%
Dallas	16%	14%	14%	18%	7%	9%	22%
DC	20%	12%	18%	17%	7%	9%	18%
Delmarva Peninsula	29%	10%	13%	14%	13%	10%	13%
Denver	12%	12%	22%	18%	9%	11%	17%
Detroit	18%	14%	16%	15%	10%	10%	19%
Grand Rapids	16%	16%	19%	15%	8%	14%	13%
Houston	15%	9%	16%	19%	6%	11%	24%
Illinois	16%	13%	19%	17%	7%	9%	18%
Indianapolis	18%	12%	21%	16%	13%	12%	9%
Kansas City	17%	14%	16%	17%	10%	13%	13%
Las Vegas	14%	14%	16%	18%	9%	10%	19%
Los Angeles	12%	12%	18%	18%	5%	10%	26%
Maine	11%	14%	18%	16%	15%	10%	16%
Miami	15%	8%	10%	23%	4%	9%	31%
Milwaukee	20%	16%	13%	15%	9%	18%	9%
Minneapolis and Rochester	17%	10%	23%	15%	5%	19%	11%
Nashville	20%	5%	14%	20%	8%	9%	24%
New Haven	22%	11%	18%	15%	13%	10%	11%
New Jersey	16%	10%	11%	23%	7%	7%	26%
New Orleans	18%	11%	18%	17%	6%	10%	20%
New York	19%	10%	11%	23%	5%	8%	23%
Omaha	14%	16%	24%	13%	6%	15%	11%
Orange High Desert	12%	11%	21%	20%	5%	9%	22%
Orlando	20%	11%	13%	21%	8%	9%	17%
Philadelphia	15%	14%	17%	19%	8%	7%	21%
Phoenix	22%	11%	13%	16%	9%	13%	17%
Pittsburgh	23%	13%	12%	15%	8%	15%	14%
Portland	23%	12%	16%	13%	9%	15%	12%
Raleigh-Durham	18%	12%	16%	24%	8%	8%	14%
Salt Lake City	13%	19%	28%	12%	5%	10%	13%
San Antonio	18%	11%	18%	15%	9%	10%	20%
San Diego	14%	18%	14%	17%	8%	14%	16%
San Francisco	16%	13%	16%	18%	5%	14%	19%
Seattle/ Washington	21%	13%	17%	12%	8%	17%	13%
South Bend	17%	11%	21%	15%	11%	13%	13%
South Carolina	19%	11%	14%	21%	8%	8%	19%
St. Louis	24%	10%	17%	18%	11%	9%	13%
Tampa	28%	10%	13%	19%	9%	13%	9%
Virginia	17%	12%	19%	17%	11%	9%	15%

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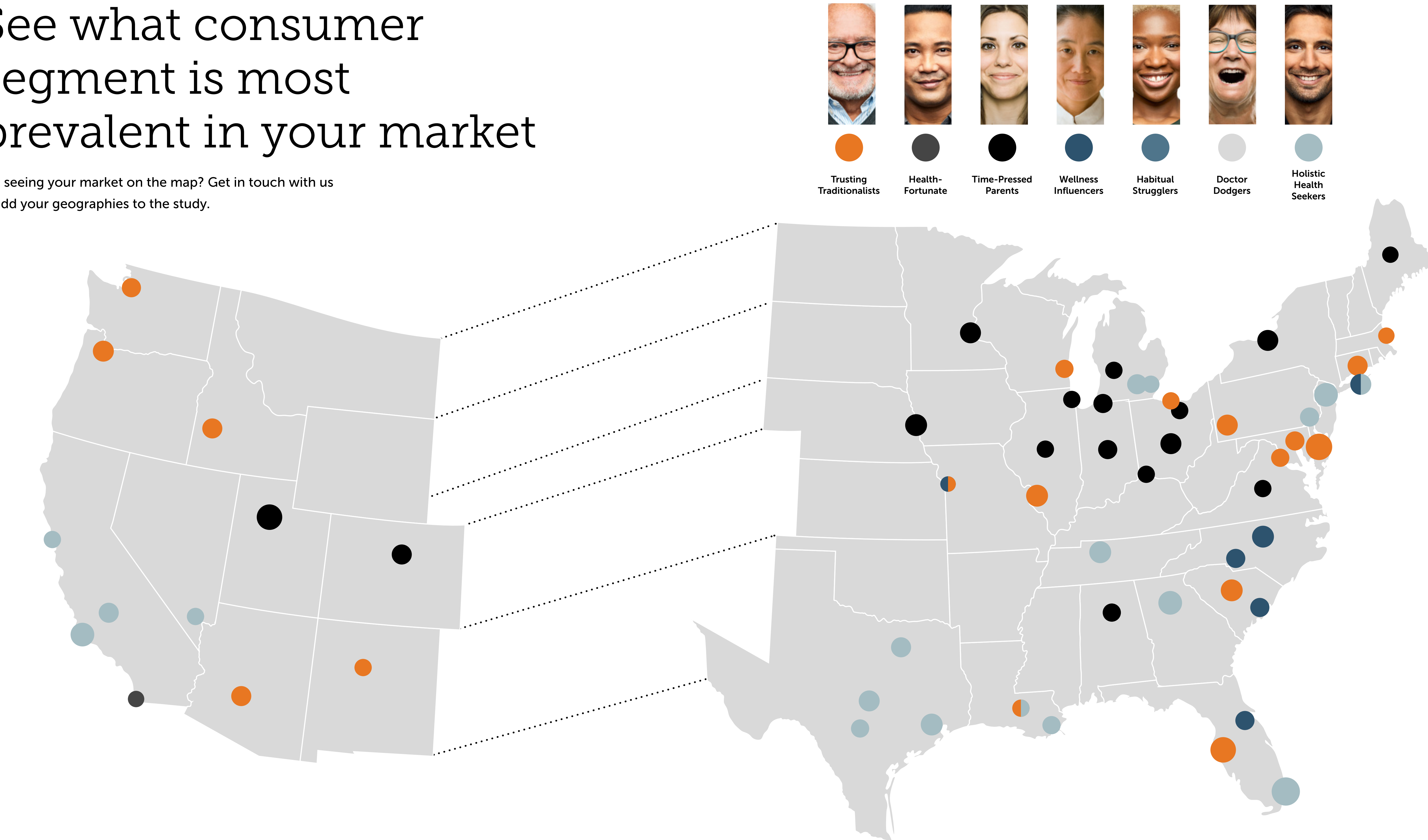
See what consumer segment is most prevalent in your market

Not seeing your market on the map? Get in touch with us to add your geographies to the study.



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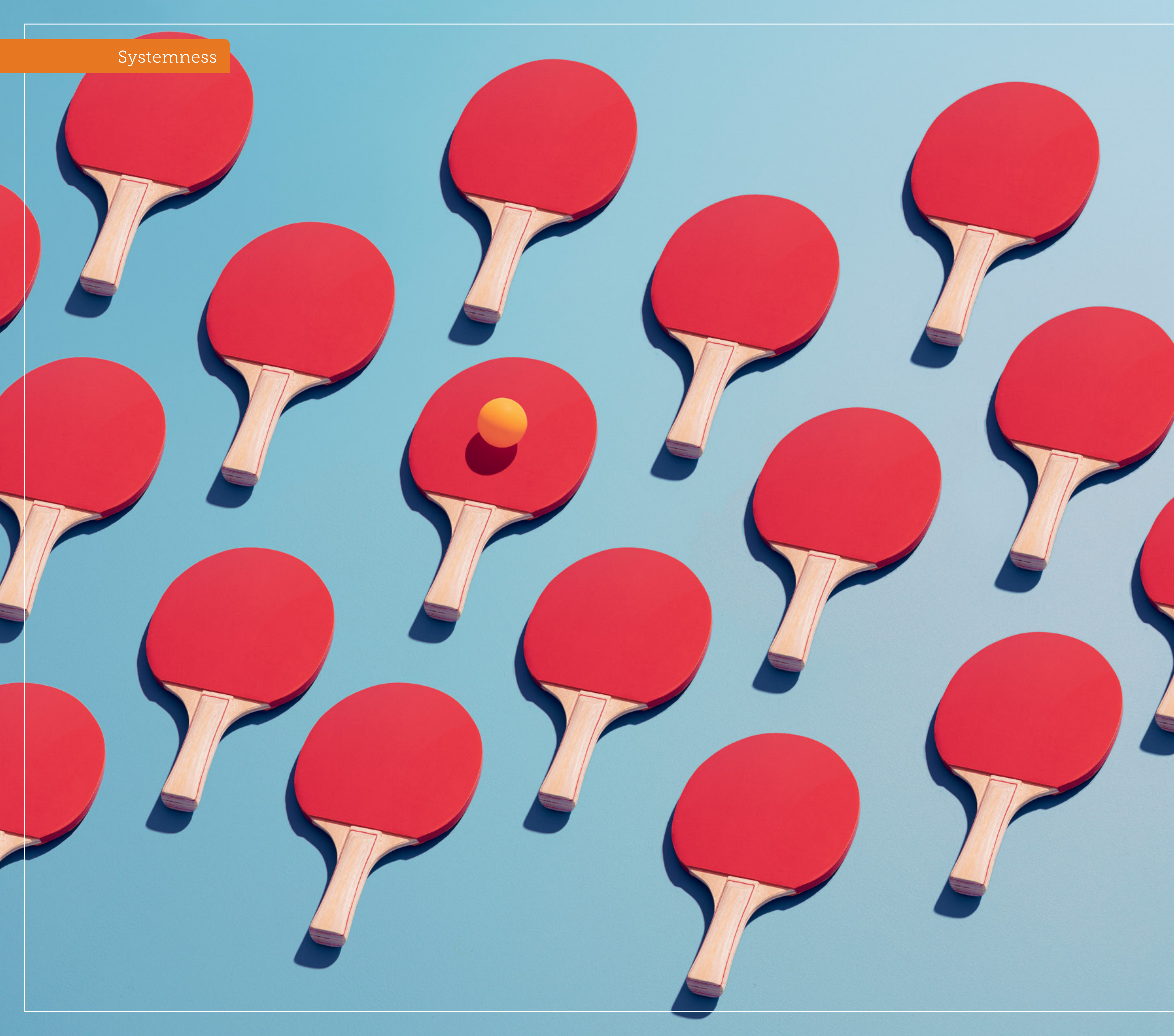

Chapter

Systemness

Over the past several years, we've seen consumer preference for services provided by a health system (compared to an independent facility) steadily increase for nearly every type of care. Convenience, seamless information access, and a wide range of specialists available motivate consumers to choose and prefer care from a system. Compared to an independent facility, healthcare systems represent consistency and reliability for consumers. Last year, we compared this to the Starbucks effect: no matter which location you visit, you know what to expect.

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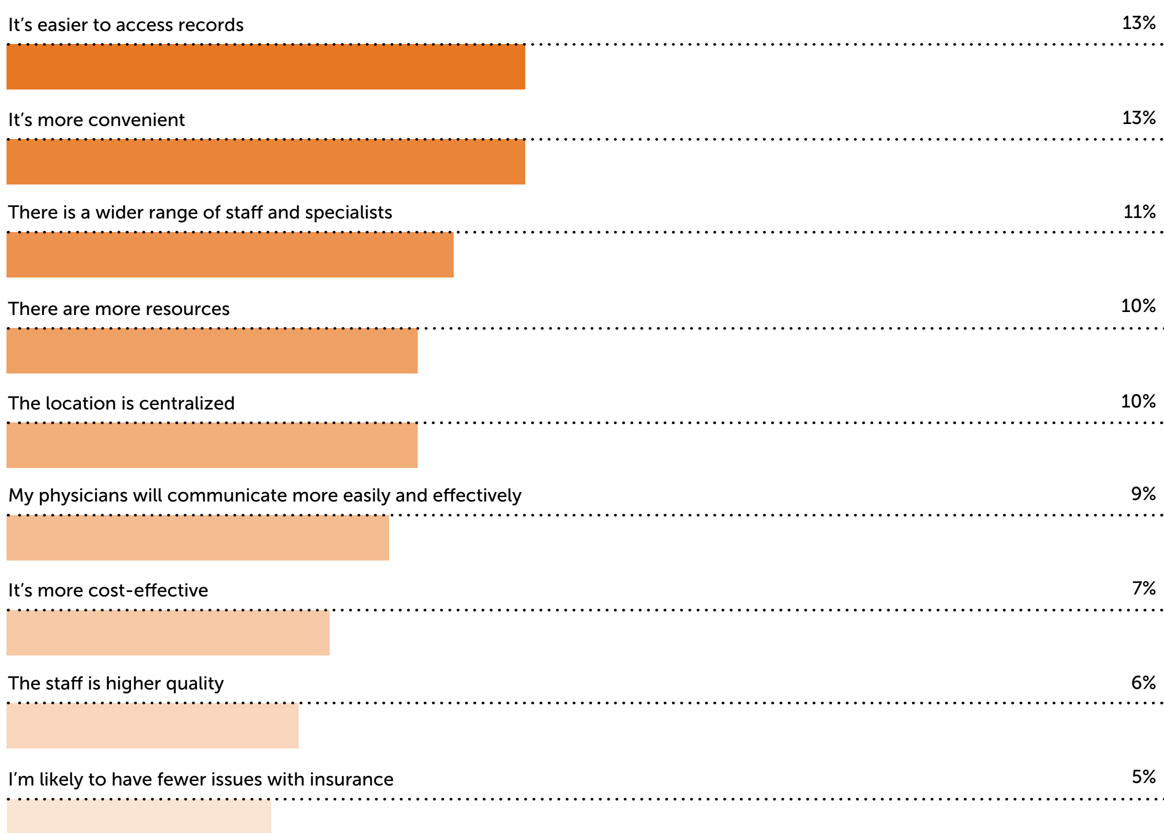
BENEFITS TO USING A HEALTHCARE SYSTEM

Despite the steady increases displayed in years prior, 2020 had a behavior-changing impact. While independent facilities have often faced incredible financial and operational pressures, the pandemic meant that the typical benefits of Systemness (including access and convenience) were stripped away as health systems focused on fighting COVID-19. At the same time, people have had to prioritize their own physical, mental, and economic battles with COVID-19, causing a drop in health engagement in general. This lack of choice and absence of the typical benefits offered by systems, combined with a reduced overall focus on health, has leveled the playing field for independent facilities during the past year.



"A healthcare system allows you to work with multiple doctors within the same unit for better care. They can cohesively work together toward your health."

– Consumer

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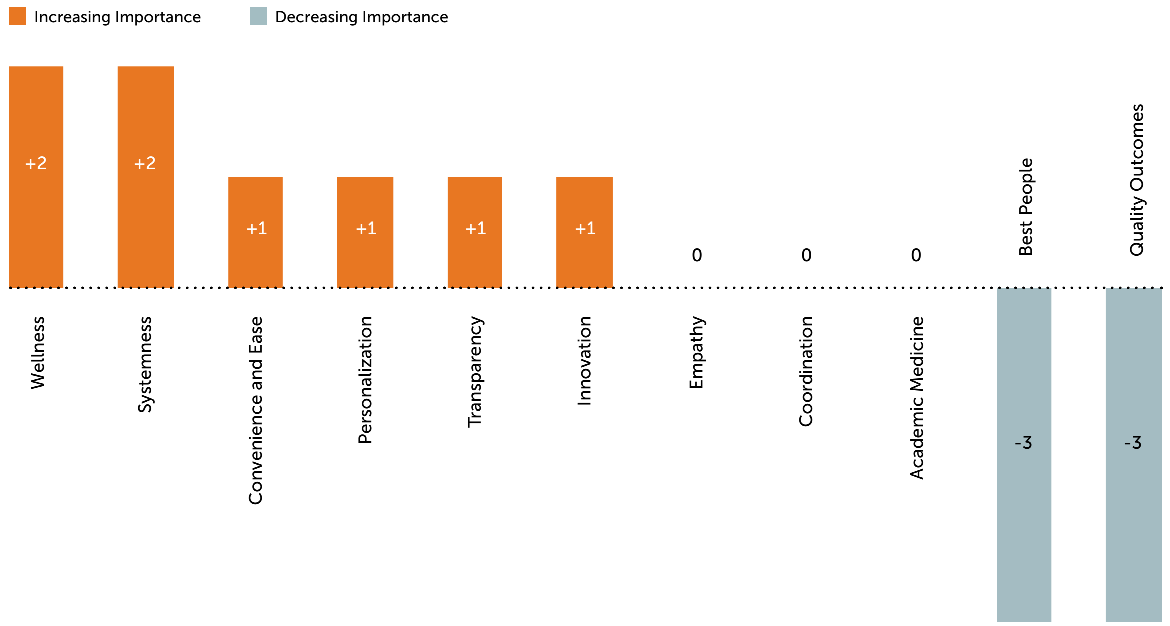
Implicitly, Systemness continues to grow in importance. Its contribution to consumer choice and advocacy has risen gradually each year with 2021 being no different. The benefits consumers see in Systemness (convenience, ease, and a wide range of specialists) also remain important drivers. This could suggest that in the face of care scarcity and reduced control as a result of COVID-19, consumer's decisions about where to get care became less about personal preference and choice, and more about where they could get in the door in the first place.

2019-2021 PREFERENCE FOR HEALTH SYSTEMS (VS INDEPENDENT) BY SERVICE TYPE

	2019	2020	2021	DIF
Hospital	68%	71%	61%	-10
Surgical services	69%	70%	61%	-9
Specialty Care Physician	60%	64%	54%	-10
Primary Care/Family Physician	56%	63%	54%	-9
High Complexity Care	64%	64%	54%	-10
Emergency Care	59%	62%	53%	-9
Urgent Care	48%	54%	44%	-10
Virtual Care or Telemedicine Visit	38%	41%	40%	-1
Pediatrics or Teenager Care	38%	43%	35%	-8
Cancer Care	NA	NA	55%	NA
Cardiovascular or Heart Care	NA	NA	59%	NA
Neuroscience	NA	NA	49%	NA
Orthopedics	NA	NA	47%	NA
Pharmacy	NA	NA	32%	NA

This year, we added a number of service lines to the mix. Those items above without year-over-year comparisons are new additions to the study this year.

2020–2021 YOY CHANGE IN DERIVED INTELLECTUAL IMPORTANCE



All of this also indicates that Systemness remains a valuable brand asset—if your experience can actually deliver on the promises and expectations that Systemness sets. Delivering on the key experience benefits that consumers associate with Systemness should be your top priority. We realize what a challenge this can be. The reason that consumers haven't fully grasped Systemness is that there is no one out there that has truly figured it out. Instead, consumers have seen legacy hospitals and platforms smashed together. They have experienced the tension of distinct cultures trying to figure out how to coexist. They have received the downstream impact of disconnected incentive structures for health system and hospital leaders that focus on individual facility performance vs. collective orientation to creating a better overall experience. These disconnects and missed opportunities have gotten in the way of consumers understanding the power and impact that Systemness can provide.

Independent individuals: A subgroup of consumers prefers services offered by independent facilities, citing factors including a more personal relationship with their provider and increased individualized attention. For some, a bigger system suggests that a brand is just "out to make money"—signaling a need for proof points that clearly demonstrate a compassionate, people-centered approach.

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Section:

HBE FRAMEWORK

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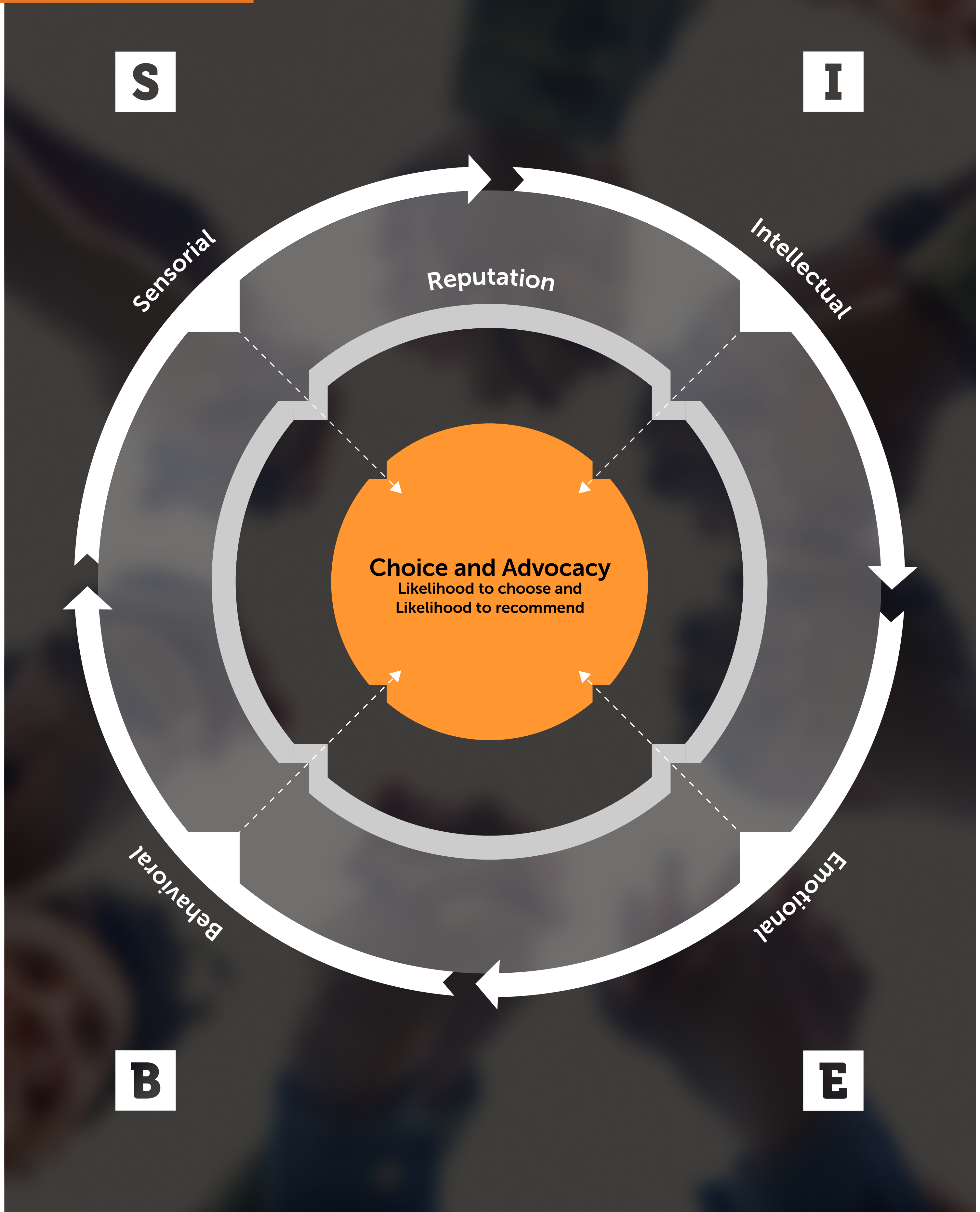
Humanizing Brand Experience Framework

The HBE framework is built for today's brand leaders and guides our research practice.

It is based on the latest social sciences and brand thinking, highlighting the experience-driven actions needed to grow reputation and move people. 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 HBE brand rankings are based on the composite score from this model, weighted by market to reflect varying category engagement.



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We evaluate all brands in the study using Monigle's proprietary HBE Framework.

This year, we continued to explore the attributes that are top of mind for consumers through our research with healthcare brands across the country. No changes were made to the model year over year, and we maintained our four areas of focus and the structural equation model (SEM) approach.

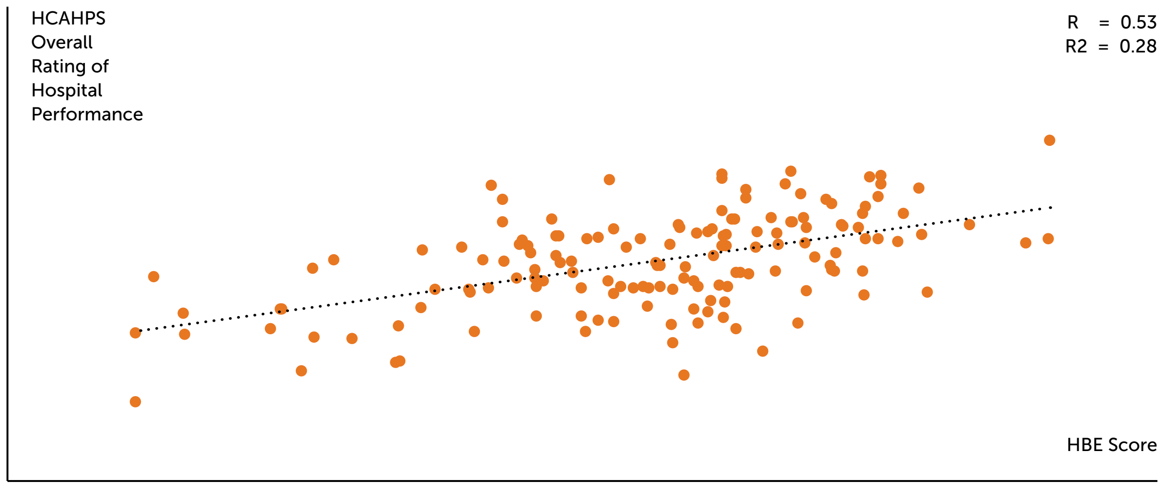
We did recalibrate our national brand scoring and ranking to adjust for variances in category engagement across markets. Composite brand scores from the SEM model were weighted by market, using the health engagement index, which measures how central health and wellness is to consumers' lives.

Bringing the model to the boardroom: Validating the relationship between experience and HCAHPS

In our experience working with healthcare organizations across the country, we often run into situations where the concept of brand experience is viewed in conflict with operational delivery. We wanted to dig into this further: Are these two things really as disconnected as many in the industry think?

We started by looking into the elements of the HBE model for more than 100 top brands and then compared them to HCAHPS scores from a similar timeline. Rather than a divergence, the results indicate a strong correlation between brand experience delivery (as displayed by our scores and ranking) and overall HCAHPS performance.

HBE SCORE VS. HCAHPS OVERALL RATING OF HOSPITAL PERFORMANCE — SYSTEM LEVEL



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This closeness emphasizes a key point of connection between brand and operations. The goals of inpatient delivery and the goals of Experience and Marketing teams are in absolute alignment. That coordination should drive the way your teams collaborate, how you set goals, and how you implement change.

Three big shifts could help spark this mindset change among your executive leadership teams:

1. Start working together

Align your Brand, Marketing, and Operations teams around shared, brand-driven goals and approaches. The pandemic has sparked new ways to collaborate, and this data should further cement the importance of breaking down the ever-present siloes in healthcare.

2. Stop neglecting brand

Marketing and Brand should not be the first budgets you cut when times get tough; you'll put financial performance directly at risk, as evidenced by this analysis. It's time to end the debate around investing in brand, as it definitively enhances aspects of experience that directly tie to business performance.

3. Think beyond "patient" experience

Create multi-disciplinary Experience teams that are charged with influencing what happens before, during, and after patient care is delivered. Patient experience is important, but experience is a broader concept that needs more holistic attention and a wider aperture to truly make an impact.

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Section:

BRAND RANKINGS

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2021 Brand Rankings

More brands. More markets. Same scoring system.

In what has been a volatile year for healthcare brands, we were purposeful in our decision not to reinvent the wheel this time around. Our model and scoring system are consistent with last year's design so we can get an accurate pre-peak COVID-19 read on the U.S. healthcare brand landscape.

How did your brand do?

Rank	Brand
1	Johns Hopkins Medicine*
2	UAB Medicine
3	UVA Health
4	UNC Health
5	Memorial Healthcare System
6	Bronson Healthcare
7	Nebraska Medicine
8	LCMC Health
9	Michigan Medicine*
10	The Christ Hospital

New this year:

23 brands were added to the ranking this year, which creates some ranking movement. The market-adjustment factor was updated to more accurately reflect variances in category engagement across markets using the health engagement index.

*Multiple markets NET score

Differences in strategy between research fielding and report development might occur.

The names and logos above reflect the brands that were included during this year's research fielding (November-December 2020). Some brands may have evolved or been updated since that time.

Rank	Brand
11	Baptist Health South Florida
12	The Ohio State University Wexner Medical Center
13	Cleveland Clinic*
14	Massachusetts General Hospital
15	Mayo Clinic*
16	IU Health
17	Beaumont Health
18	UT Southwestern Medical Center
19	Ochsner Health System*
20	The University of Kansas Health System
21	Intermountain Healthcare
22	TriHealth
23	Spectrum Health
24	Houston Methodist
25	Brigham & Women's Hospital
26	OhioHealth
27	St. Luke's Health System
28	Kadlec
29	Trinity Health Detroit
30	NewYork-Presbyterian
31	Texas Health Resources
32	UCLA Health*
33	University of Miami Health System
34	Penn Medicine
35	Duke Health*

*Multiple markets NET score

Rank	Brand
36	Inova
37	Stanford Healthcare
38	Northwestern Medicine
39	OHSU Healthcare
40	BJC HealthCare
41	Froedtert & Medical College of Wisconsin
42	Beth Israel Lahey Health
43	ChristianaCare
44	UChicago Medicine
45	Novant Health
46	Memorial Hermann
47	Medical City Healthcare
48	Atrium Health
49	Tampa General Hospital
50	Rush University Medical Center
51	UC Health
52	Carilion Clinic
53	NYU Langone Health
54	Emory Healthcare
55	National Jewish Health
56	UT Health San Antonio
57	Kettering Health Network
58	AdventHealth*
59	BayCare
60	MaineHealth

*Multiple markets NET score

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Rank	Brand
61	University of Maryland Medical System
62	MemorialCare*
63	Catholic Health Services of Long Island
64	Mercy Hospital
65	McLeod Health
66	St. Elizabeth Healthcare
67	UCHealth
68	UW Medicine
69	University of Utah Health
70	Main Line Health
71	Orlando Health
72	Mercy Medical Center
73	UCSF Medical Center
74	Allegheny Health Network
75	Virtua Health
76	Yale New Haven Health
77	SwedishAmerican
78	UC San Diego Health
79	Advocate Healthcare*
80	Community Health Network
81	St. Joseph Health*
82	Valley Health System
83	Hoag Memorial Health
84	Our Lady of the Lake
85	NorthShore University HealthSystem

*Multiple markets NET score

Rank	Brand
86	Methodist Health System
87	Torrance Memorial Medical Center
88	Advocate Aurora Health
89	Beacon Health
90	Beebe Healthcare
91	St. Luke's Hospital
92	Baylor Scott & White Health*
93	Grandview Medical Center
94	HealthPartners
95	Sparrow
96	Jefferson Health
97	Sunrise Health
98	Sharp HealthCare
99	Keck Medicine of USC*
100	University Hospitals*
101	Trinity Health Mid-Atlantic
102	Cedars-Sinai
103	Dignity Health*
104	WellStar
105	UCI Health
106	UPMC
107	George Washington University Hospital
108	University of Missouri Health
109	St. Peter's Health Partners
110	Henry Ford Health System

*Multiple markets NET score

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Rank	Brand
111	LifePoint Health
112	West Hills Hospital and Medical Center
113	Swedish Health Services
114	Hartford HealthCare
115	Saint Luke's Health System
116	OptumCare*
117	Northwell Health
118	Boone Hospital Center
119	Northside Hospital Atlanta
120	Providence Health & Services*
121	SSM Health
122	Scripps Health
123	Trinity Health of New England
124	WakeMed Health
125	Atlantic Health System
126	Methodist Healthcare
127	HonorHealth
128	Carle Foundation Hospital
129	Loyola Medicine
130	Detroit Medical Center
131	MedStar Health*
132	TidalHealth
133	Mount Sinai Health System
134	Tidelands Health
135	Tufts Medical Center

*Multiple markets NET score

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Rank	Brand
136	Munson Healthcare
137	HealthCare Partners*
138	Saint Joseph Health System
139	St. David's HealthCare
140	Mercy Health Cincinnati
141	Metro Health – University of Michigan Health
142	Asante
143	University Health System
144	Saint Alphonsus Health System
145	OSF HealthCare
146	Conway Medical Center
147	Piedmont Healthcare
148	Saint Joseph Mercy Health System
149	SCL Health
150	Broward Health
151	Legacy Health
152	AMITA Health
153	Goshen Health
154	Grand Strand Health
155	Nuvance Health
156	The Valley Health System
157	Centura Health
158	Ascension*
159	Summa Health
160	LifeBridge Health

*Multiple markets NET score

Rank	Brand
161	Allina Health
162	South Bend Clinic
163	Presbyterian Healthcare Services*
164	Hackensack Meridian Health
165	Central Maine Healthcare
166	MultiCare
167	Baptist Health System
168	HealthONE
169	Tulane Medical Center
170	Sutter Health
171	HCA Healthcare*
172	RWJBarnabas Health
173	CHI*
174	Banner Health
175	Baton Rouge General
176	M Health Fairview
177	Franciscan Health
178	Mercy Health Grand Rapids
179	Kaiser Permanente*
180	Atlantic General Hospital
181	University Medical Center
182	Denver Health
183	Premier Health
184	The MetroHealth System
185	UNM Health System

*Multiple markets NET score

Rank	Brand
186	PeaceHealth
187	Lake Health
188	Adventist Health
189	Sentara Healthcare
190	East Jefferson General Hospital
191	Grady Health System
192	HCA Midwest Health
193	McLaren Healthcare
194	MaineGeneral Health
195	Northern Light Health
196	Lovelace Health System
197	Brookwood Baptist Health
198	Steward Healthcare
199	Mount Carmel Health
200	Truman Medical Centers/University Health
201	CHRISTUS St. Vincent Health System
202	West Valley Medical Center (HCA)

Join the movement

Learn more about subscribing to our 5th edition of this report. As a subscriber to Humanizing Brand Experience - Volume 5, you will gain access to personalized data for your specific brand and market, while also receiving the report learnings prior to public distribution. If your brand is already included, we can also provide access to the data including past year comparisons. For more information, get in touch with us here:

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Top 10 biggest movers 2020 to 2021

Brand	2021 Brand Rank National	2020 Brand Rank National	2020-2021 Rank Change
ChristianaCare	43	157	114
Medical City Healthcare	47	148	101
LCMC Health	8	85	77
Kadlec	28	104	76
Catholic Health Services of Long Island	63	138	75
St. Elizabeth Healthcare	66	137	71
Novant Health	45	111	66
University of Maryland Medical System	61	127	66
Inova	36	97	61
UT Southwestern Medical Center	18	72	54

Top new entrants in 2021

Rank	Brand
2	UAB Medicine
3	UVA Health
7	Nebraska Medicine
29	Trinity Health Detroit
52	Carilion Clinic
56	UT Health San Antonio

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LCMC Health, a system in New Orleans, performed exceptionally well—jumping 77 spots to number-8 rank overall—during a challenging year for many brands. We spoke with Christine Albert, Chief Marketing and Experience Officer at LCMC Health, to get her insights on how to build a human-centered brand that isn't afraid to be vulnerable and how having a strong, provider-backed positioning made it easier to stay focused through COVID-19.

Monigle: What role do human brand experiences play in how you think about your brand and how you approach healthcare across the board?

Christine: Our brand is all about our people. They are our distinct, unique competitive advantage, and that knowledge and belief stretches from the top of the organization to the people on the frontline. At every level, we truly strive to put our people at the center of what we do, so that they always feel supported, equipped, and encouraged to do the same for our patients.

The fact that our brand is centered on our people inspires a culture of ownership, and we've had a really strong response since it launched. It's their thing, not Marketing or Human Resources or leadership, and so they can really own it and love it and live it every day. Having that internal strength to start is how we get through the challenges and the harder, messier stuff in order to be intentional and consistent as we think through how to continue humanizing our experiences. We've got the "why" down—our people know it and live it—so now we can focus on the "how."

Monigle: Your people have really connected with your brand. Why do you think that is? What role did human elements of the brand help to create?

Christine: Our brand is joyful and fun and human. It's a celebration of the individuality and community that make us us, so our people see themselves in it and can connect with it right away. People working in healthcare are there for a shared purpose: the care and the humanity. Having a brand built on that resonates with people.

Whenever people start looking backward toward the status quo of "what we've always done" or where we came from, we can use our brand as a lens to remind people about how important it is to stay focused on the people and the care for the future. It has allowed us to reimagine important, but sometimes stale, cultural and digital tactics, like employee recognition and provider profiles. We've taken a fresh look at each of them with our human-led brand as the filter. Our culture is built and evaluated on how we demonstrate and deliver humanity above and beyond what people expect from healthcare. We build personality into our provider profiles to help our consumers understand the human inside of the lab coat. Embracing this brand every day naturally forces all of us at LCMC Health to look at what we do differently, and we know that this is tied to our performance with the people that matter—our employees and our consumers.

Monigle: During the last year, how have you helped your organization stay focused on this humanity through all of the volatility and uncertainty around you?

Christine: Some of it reflects at a senior leadership level. Our brand gave them the language and permission to not just repeat the same things that everyone in our industry was speaking—things that don't really mean anything at all at this point—and instead focus on real communication and human stories. That transparency and commitment to humanity encouraged and bolstered us as a community through a tough year.

> People working in healthcare are there for a shared purpose: the care and the humanity. Having a brand built on that resonates with people.

We also continued elevating and celebrating our people in a way that felt true to who we are, unexpected and sometimes offbeat, but always fun, warm, and approachable. And we kept sharing that in our internal and external brand communications as well, which helped us shed a positive light—people love seeing people and hearing their stories.

Monigle: What humanizing programs, efforts, or initiatives are you most proud of over the past year?

Christine: We really focused on humanizing our provider profiles this year, which has become a tangible way to show how our providers are unique individuals and community members. As we moved into digital and telehealth spaces, these profiles really helped humanize a technology-enabled solution. Being the "best" provider goes beyond expected things like training and diplomas. Consumers connect on a personal level. And our providers like showing that human side of themselves, in a community-facing way, sharing hobbies and favorite ice cream flavors, to create a more human profile. They enjoy it—they are proud of their profiles and will share them.

We also shared two powerful campaigns this year, Live Wellthy and Practice Social Generosity. The message and tone of these were unexpected for healthcare—it was real and authentic and helped us show our community that we see them and that we're here for them. Our leadership was really supportive and key to implementing these campaigns, even though they were pretty different for the industry. But again, it came back

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to our brand—and our brand elevates the human connection above the healthcare status quo.

We also put significant organizational energy into our online scheduling efforts. This helps us create a differentiating experience within the parameters of EPIC. We're still always working to make things easier and more human for our patients, so it's an ongoing effort.

Monigle: What tips do you have to share with Brand, Marketing, and Experience leaders to help them continue humanizing their brands?

Christine: First, you have to figure out what will motivate you and your team to keep working. Get comfortable with the slog, because shifting the status quo and putting people at the center of what you do is hard work, and it doesn't happen overnight. You have to be in it for the long term and willing to roll up your sleeves and convince people why it matters. Our first year was transformational from a culture standpoint as people got comfortable with the brand. Now we need to continue hardwiring it into our DNA and every single touchpoint.

Second, you have to get everyone else on board. Making providers a key part of our process has been really helpful. We had to show them how they are proof points for our human-centered orientation. It was challenging at first, but now that they are on board, we have a really strong, influential support system for our brand. Beyond providers, we strive to create relationships and connections across all of the different departments and titles in our organization. We want to find the individuals who can help elevate the brand and carry us forward, who share the same aspirational vision as the brand and want to see it succeed. They are our brand advocates, so we do everything we can to empower them.

Finally, it's important to redefine what success means. Launch is a time to celebrate the brand, but that's not what success really is. Success is when people naturally embody the brand and bring it to life through their day-to-day. Success is when brand becomes a part of your entire organization's DNA.

As the team's work at LCMC Health clearly shows, you can lead on humanizing brand experiences by expressing vulnerability and acknowledging problems, just as much as you can win with science and data and technology. There is more than one way to be a leading brand, and we need to push healthcare beyond its singular mentality. A truly humanized brand experience is about recognizing the truth behind why we show up every day: to help people and to care for people. We shouldn't be afraid of embracing the natural characteristics and empathy of care. After all, brands should make people feel something—so why not make them seem human, empathetic, and real?

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Section:

IMPLICATIONS AND TAKEAWAYS

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We know this sounds crazy, but hear us out...

Healthcare brand leaders, you've made it through an intensely challenging year. You've proven your resilience, strength, and ability to adapt rapidly under immense pressure. Many of you have stood up digital care offerings practically overnight, innovating and trialing new care methods that previously would have required months, if not years, of planning and implementation. Your employees and caregivers have rallied behind a common goal of taking care of those who need it most and have displayed unwavering heroism in the face of uncertainty. You boosted trust among consumers when they needed it most. There is so much to be proud of.

While COVID-19 shook what felt like every element of the healthcare industry during the past year, the worst thing you can do now is overreact to it. Yes, we know this sounds crazy—hasn't COVID-19 been a catalyst for rethinking the way we do things?

What we're talking about here are brand-based overreactions. As the data from this year shows, your consumers haven't truly changed, and they still want and need the same things from your brand experiences. Remember that when any conversation comes up about changing your brand or your branding strategies to flex to the post-COVID era. Don't overcorrect. Make smart adjustments based on your consumer's proven needs—not your assumptions or beliefs or those of your physicians, boards, and leadership teams.

Here's an example to consider. During the past year, healthcare brand teams scrambled to pivot all communications and messaging to directly address the pandemic. While it's important for brands to recognize and respond to what's going on—especially with something as critical as COVID-19—you don't have to anchor yourself to pandemic-driven stories for eternity. It's as important for you to share human, brand, and experience-boosting communications as it is to share virus-related updates. Ultimately, that is what will encourage people to connect—and reconnect—with your brand. Going forward, strive to find a natural balance as opposed to the overcorrection that might feel more expected.

We promised you that this year's report will be about how to move toward the future of healthcare. Without further ado, here are some of the things you should keep top of mind as we head into tomorrow:

1

Retake Control of the Narrative

During the past year, it seems like every brand, regardless of category, was expected to have a perspective on health and safety. As a result, it wasn't only the health experts addressing consumers, but also schools, yoga studios, restaurants, and retail chains. Adding to this complicated landscape is the growing Holistic Health Seeker segment—the tip of the iceberg revealing an ever-changing consumer perspective on health and care. As a healthcare organization, your brand has a special credibility, authenticity, and baked-in ownership that can cut through the category noise, and it's time to claim back that core role. This shouldn't require a major pivot or revolution. In fact, it's time to double down on the reasons for being that have been your North Star all along.

However, it is a great time to gut-check the strength of your brand experience delivery: Is it consistent, is it ownable, and is it stretchy enough for the changing future? For the foreseeable future, you have to be able to answer each of those questions with a "yes," not just for the physical experiences that you have always focused on but also for the net new digital experiences that will be part of tomorrow's delivery. Even more critical will be how you help the organization navigate the points of convergence and divergence among the two if you really hope to reclaim the industry narrative that you are best poised to guide.

2

Find Your Own Path to Reassurance

We know that feeling secure is what really matters to people when it comes to decisions about their healthcare. The question now is how to deliver Security in a way that is unique, authentic, and ownable for your brand. Going forward, every organization will need to create its own clear, actionable definition of what Security is and how it's delivered through experience. It could be all about communications and programs, or it could be about employee behavior and culture. Whatever your brand's formula for reassurance is, make sure it is rooted in the values and actions that connect your consumers, culture, and community. And make sure that you align every person within your organization around this potential rallying cry. To make real impact, our people have to reassure as often as our brand does.

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3

Fight for People, Not Robots

It’s time to reframe the way we think and communicate about innovation as a concept. Consumers define innovation from a people-centric, humanizing perspective. For them, it’s about changing processes to improve the individual experience, treating their whole person (mind, body, and spirit) with unexpectedly personalized attention. If you want to own the conversation about innovation, your brand needs to expand its definition from one focused on clinical technologies and advancements to a much broader and more inclusive, forward-looking definition of the idea. That may mean pushing back on physicians who have a different definition about what innovation stands for. Your Brand and Marketing teams will need to fight for messages that humanize innovation—because at the end of the day, the stories that strike consumers as most innovative aren’t the ones about robots; they’re the ones where patients are valued as people.

4

Reinvent Digital Care Spaces

For years, healthcare brands have been focused on creating the ideal physical environment and experience. However, as consumers continue to demonstrate an increasing appetite for virtual care, it’s now just as critical to create a thoughtful digital experience as well—one that supports and intersects with in-person spaces and touchpoints. Consider how much research your brand has put into delivering brand experiences in these new digital spaces. Have you mapped out the telehealth journey? Have you considered how to deliver a higher level of personalization and engagement during video care sessions? Have you studied what content should be displayed to people while they idle in virtual waiting rooms?

Going forward, virtual care has the potential to break down traditional geographic barriers of choice, giving consumers more freedom to choose from a more diverse roster of providers. This means it will be essential to get your digital care experience right as soon as possible. Remember that what works in a physical environment may not seamlessly translate to digital spaces and that re-creating mediocre in-person experiences is missing the point completely. To lead the way in building these new spaces, brands will have to go back to square one.

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5

Target Hearts and Minds

Historically, healthcare brands have organized and defined their audiences by demographics. However, this approach is flawed and limited, and it doesn't reflect the complex, multi-faceted reality of who your audiences are—or how they behave. If your brand's audience "segments" are still defined by factors like age and race, it's time to revisit them from a more thoughtful perspective. This can be achieved by asking different questions and organizing based on meaningful experience needs, rather than arbitrary demographics. Consider the whole person when building your new user profiles, not just who they appear to be on paper.

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This was a hard year in healthcare, and at this point, we are all craving a return to normalcy. However, we can't let the post-COVID era and mentality push our industry backward toward "the way we did things before." Through all of the chaos of this year, healthcare brands showed ingenuity, adaptability, and an unwavering commitment to care. It's that spirit that will help brands lead the way tomorrow. Keep focused on your "why." Keep encouraging and equipping your people. Keep working toward humanizing your brand experiences. This is a time for healthcare leaders to look forward, not back.

We'll be there with you every step of the way.

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METHODOLOGY AND DETAILS

THE HUMANS

Healthcare decision-makers for the household that have received medical care in the past two years and have health insurance (70% private / 30% government—excludes Medicaid)

THE METHOD

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

THE NUMBERS

n = 30,138 total respondents

n = 3,035 respondents who are nationally representative of the U.S. in terms of gender, age, and region

n = 27,103 respondents who are from all 61 markets where brands were evaluated

THE FIELDWORK

Wave 4 (2021) November–December 2020

Wave 3 (2020) November–December 2019

Wave 2 (2019) November–December 2018

THE SCIENCE

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

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Monigle is a creative experience company fueled by humanizing brands that move people.

As one of the largest independent brand consultancies in the United States, we're independent in spirit and in ownership, unbound to both the status quo and shareholders. Fueled by 140+ builders and makers across offices in Denver and New York, our teams create and deliver powerful brand experiences across a spectrum of services, including insights, strategy, creative, culture, activation, branded environments, and BEAM—the world's leading brand engagement and asset management platform. Humanizing Brands. Moving People. Visit www.monigle.com to learn more.

Society for Health Care Strategy & Market Development

The Society for Health Care Strategy & Market Development (SHSMD) of the American Hospital Association is the largest and most prominent voice for health care strategists in marketing, strategic planning, business development, communications and public relations. SHSMD is committed to leading, connecting, and serving its members to prepare them for the future with greater knowledge and opportunity as their organizations strive to improve the health of their communities. The society provides a broad and constantly updated array of resources, services, experiences and networking connections. Learn more at www.shsmd.org.

About the American Hospital Association

The American Hospital Association (AHA) is a not-for-profit association of health care provider organizations and individuals that are committed to the health improvement of their communities. The AHA advocates on behalf of our nearly 5,000 member hospitals, health systems and other health care organizations, our clinician partners—including more than 270,000 affiliated physicians, 2 million nurses and other caregivers—and the 43,000 health care leaders who belong to our professional membership groups. Founded in 1898, the AHA provides insight and education for health care leaders and is a source of information on health care issues and trends. For more information, visit the AHA website at www.aha.org.