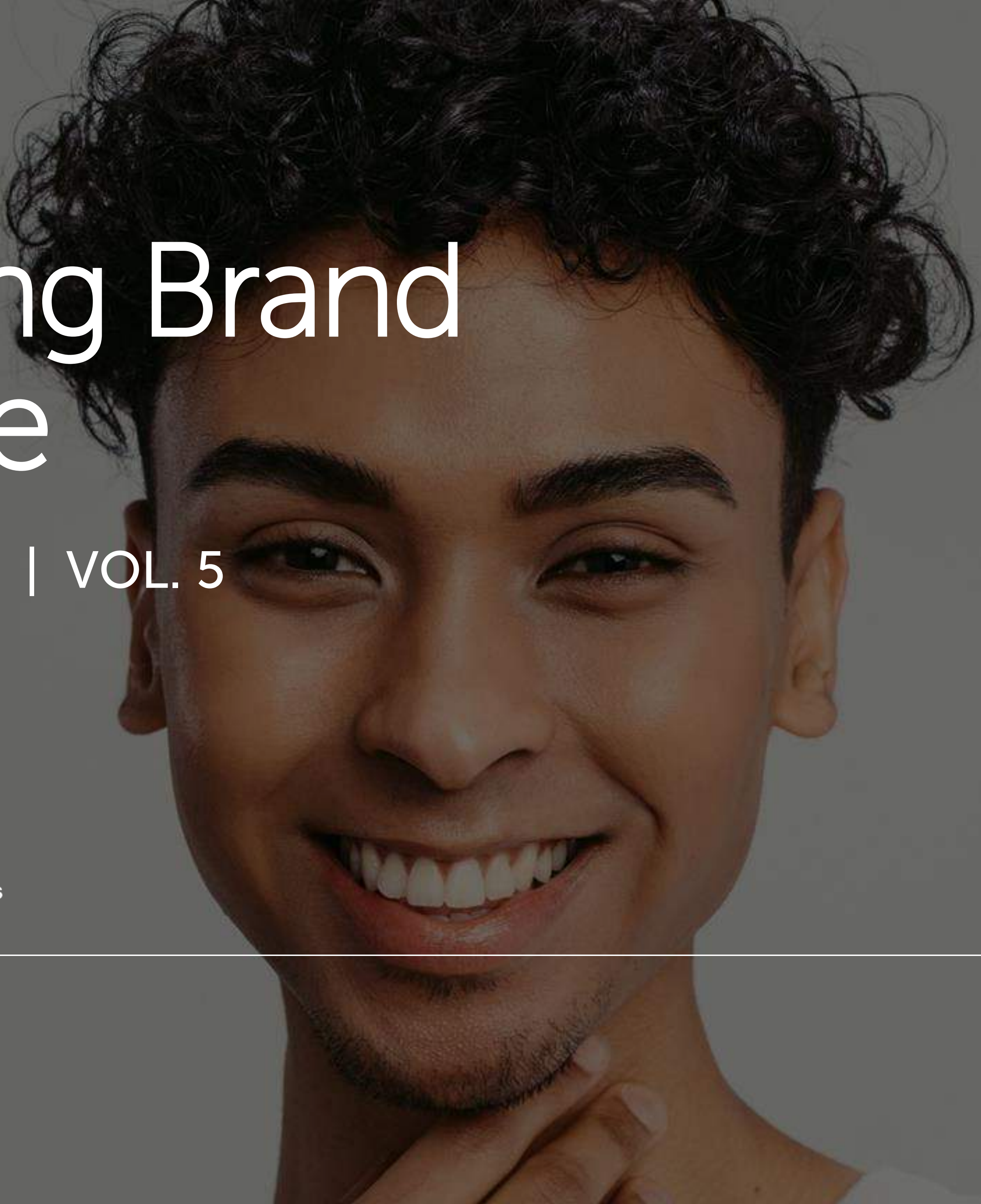

Humanizing Brand Experience

HEALTHCARE EDITION | VOL. 5

Executive Summary – 2022

SHSMD Society for Health Care Strategy & Market Development℠

AHA Data & Insights

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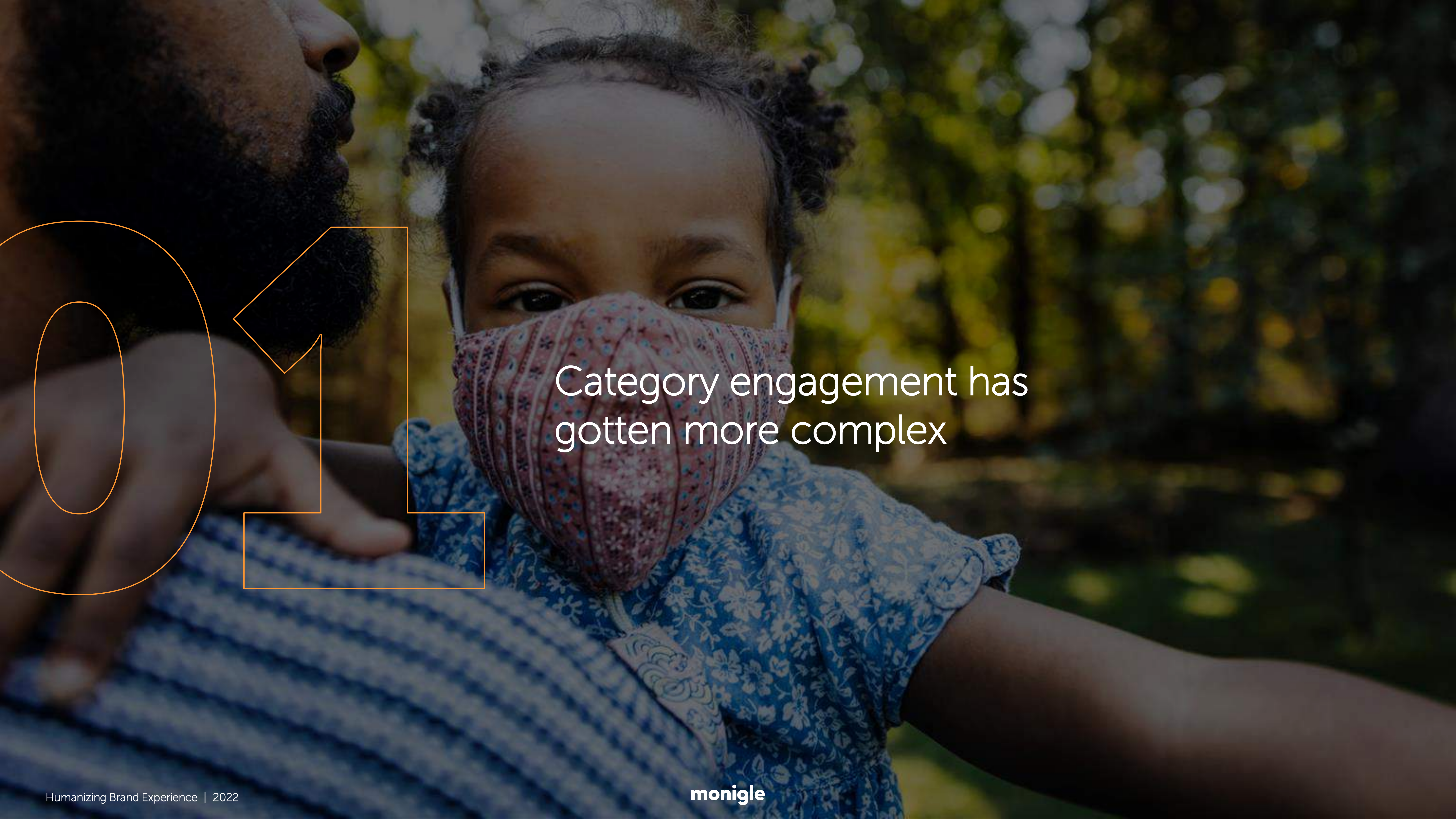
The landscape has forever changed. How will your brand, experience, and culture fit into the new world?

CHAPTERS



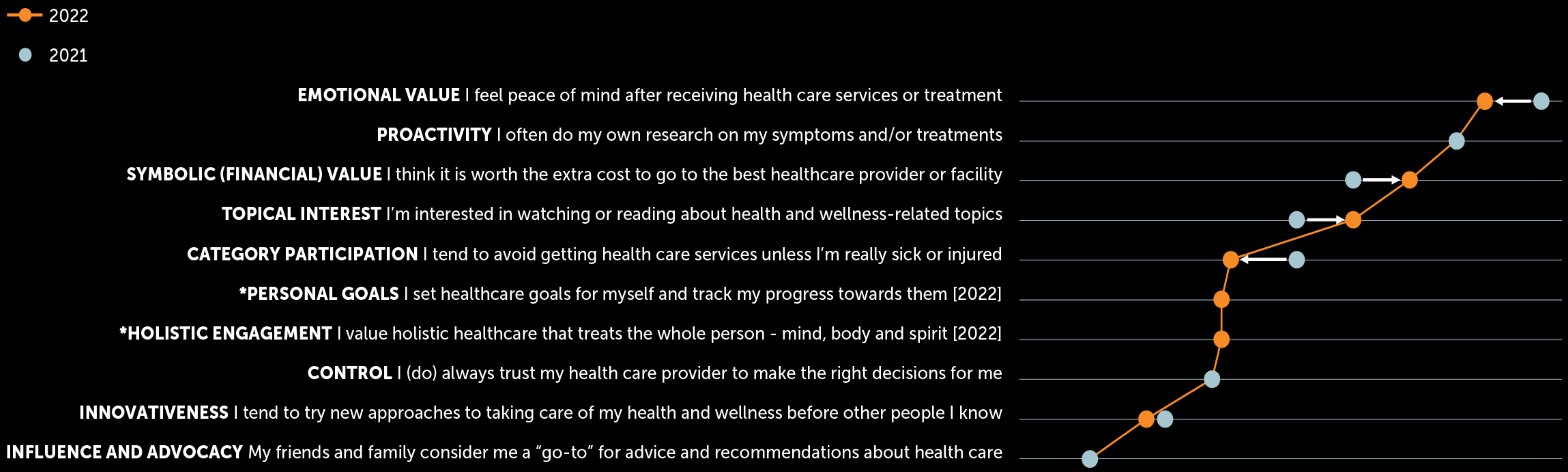
01

Category engagement has gotten more complex

National healthcare engagement remains stagnant and has yet to recover to pre-COVID levels

Base All U.S. nationally balanced respondents 2019 (2656), 2020 (3035), 2021 (3000), 2022 (3183)
QI1 First, we'd like to better understand how you think and feel about health care. Please select how much you agree or disagree with each statement
Data Health Engagement Index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence, and Advocacy

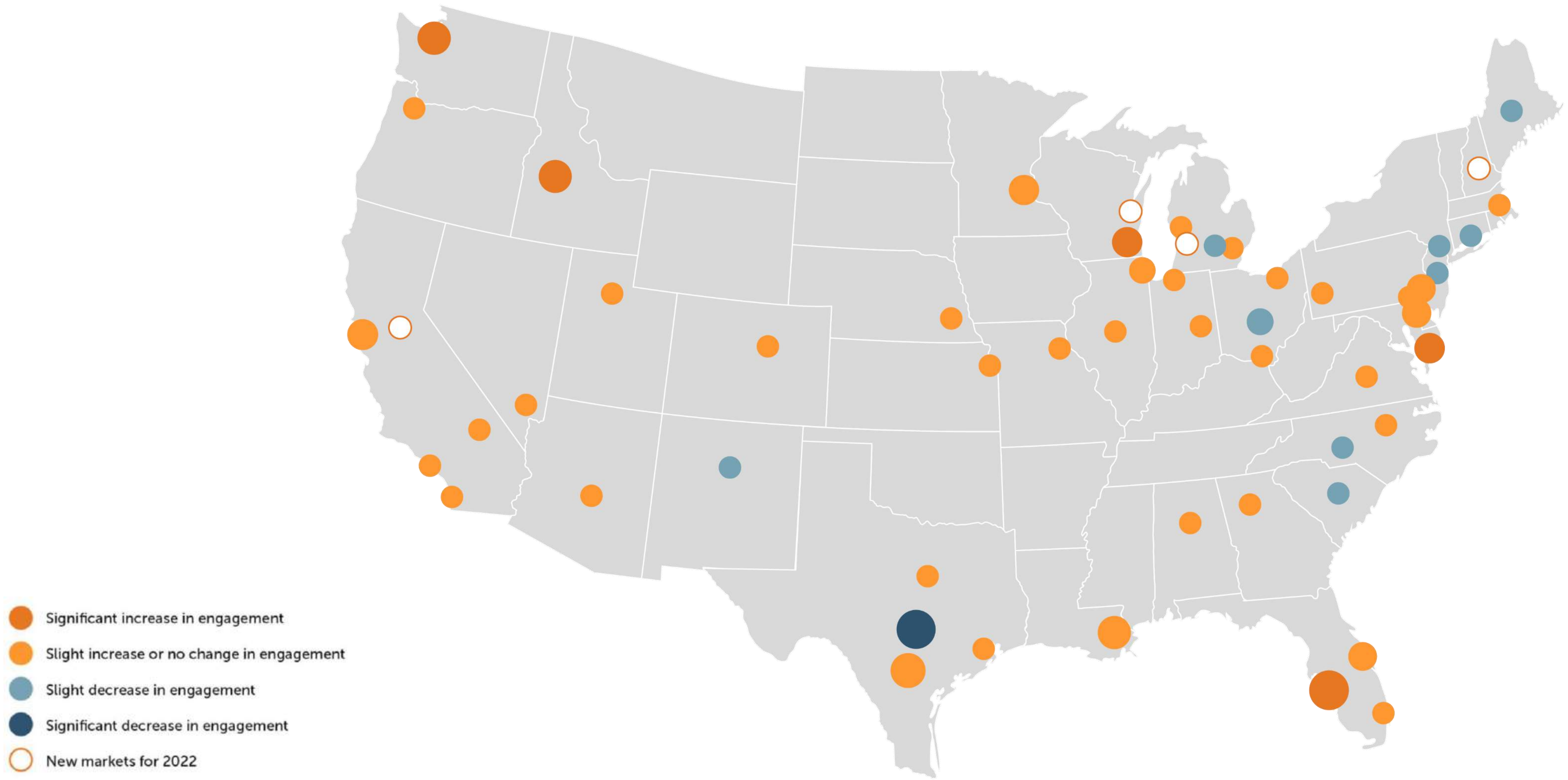
Here's the good news – the perceived financial value of healthcare and topical interest is up



Statement	2022	2021	YOY CHANGE
EMOTIONAL VALUE I feel peace of mind after receiving health care services or treatment	72%	75%	-3
PROACTIVITY I often do my own research on my symptoms and/or treatments	69%	69%	0
SYMBOLIC (FINANCIAL) VALUE I think it is worth the extra cost to go to the best healthcare provider or facility	64%	61%	+3
TOPICAL INTEREST I'm interested in watching or reading about health and wellness-related topics	58%	55%	+3
CATEGORY PARTICIPATION I tend to avoid getting health care services unless I'm really sick or injured	51%	55%	-4
***PERSONAL GOALS** I set healthcare goals for myself and track my progress towards them [2022]	50%	NA	-
***HOLISTIC ENGAGEMENT** I value holistic healthcare that treats the whole person - mind, body and spirit [2022]	50%	NA	-
CONTROL I (do) always trust my health care provider to make the right decisions for me	49%	49%	0
INNOVATIVENESS I tend to try new approaches to taking care of my health and wellness before other people I know	42%	43%	-1
INFLUENCE AND ADVOCACY My friends and family consider me a "go-to" for advice and recommendations about health care	33%	33%	0

Base All U.S. nationally balanced respondents 2019 (2656), 2020 (3035), 2021 (3000), 2022 (3183)
QI1 First, we'd like to better understand how you think and feel about health care. Please select how much you agree or disagree with each statement
Data Top 2 Box Scores
* Statements added in 2022

Although national healthcare engagement levels remain stagnant, signs of recovery are visible in key metropolitan areas



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

2021 – 2022 YOY change in the Healthcare Engagement Index by market

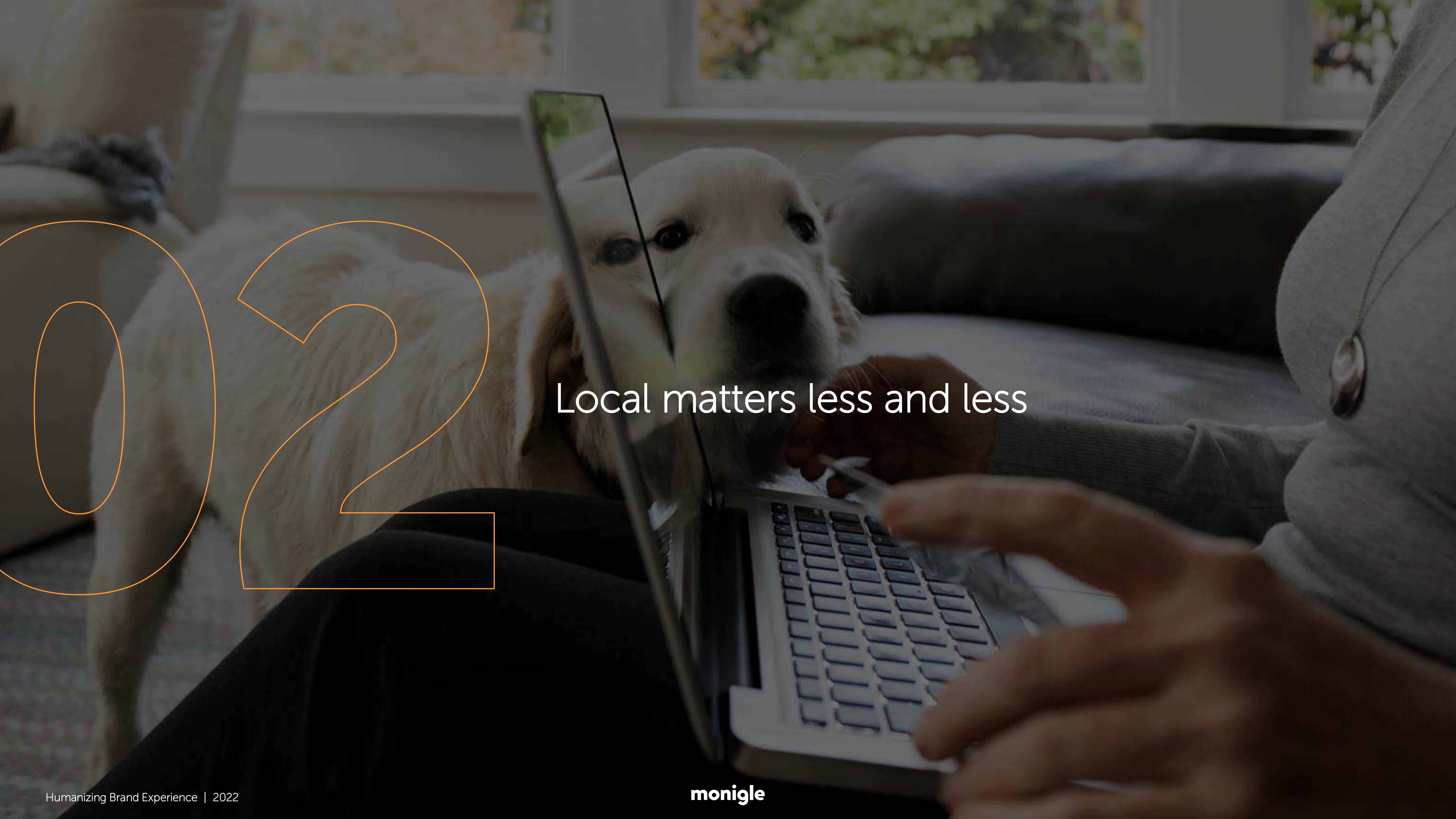
	2022 Index	2021 Index	YOY Change
Miami	123	123	=
New Jersey	118	120	-2
Los Angeles	118	114	+4
Orlando	118	111	+7
Philadelphia	117	108	+9
New York	117	119	-2
Houston	116	114	+2
San Francisco	116	108	+8
New Orleans	116	108	+8
Chicago	115	108	+7
DC	115	107	+8
Atlanta	115	115	=
Dallas	114	108	+6
Orange High Desert	113	111	+2

	2022 Index	2021 Index	YOY Change
Tampa	113	99	+14
San Antonio	113	105	+8
San Diego	113	108	+5
Birmingham	113	111	+2
Baltimore	112	106	+4
Raleigh-Durham	111	104	+7
New Haven	111	106	+5
Illinois	110	109	+1
Delmarva Peninsula	110	97	+13
Seattle/Washington	109	97	+12
Boston	109	102	+7
South Carolina	109	114	-5
Denver	109	106	+3
Detroit	109	107	+2

	2022 Index	2021 Index	YOY Change
Las Vegas	109	109	=
Boise	107	95	+12
Virginia	107	104	+3
Phoenix	106	106	=
Cleveland	106	102	+4
Columbus	106	114	-8
Ann Arbor	106	107	-1
Minneapolis and Rochester	106	97	+9
Indianapolis	105	101	+4
Austin	105	118	-13
Kansas City	105	103	+2
St. Louis	104	103	+1
Grand Rapids, MI	104	99	+5
Charlotte	104	107	-3

	2022 Index	2021 Index	YOY Change
Salt Lake City	102	96	+7
South Bend	102	99	+3
Green Bay, WI	102	*	*
Cincinnati	102	97	+5
Milwaukee	102	92	+10
Sacramento	101	*	*
Portland	100	93	+7
Omaha	100	95	+5
Kalamazoo	99	*	*
Greater New Hampshire	99	*	*
Pittsburgh	99	99	=
Albuquerque	97	98	-1
Maine	95	97	-2

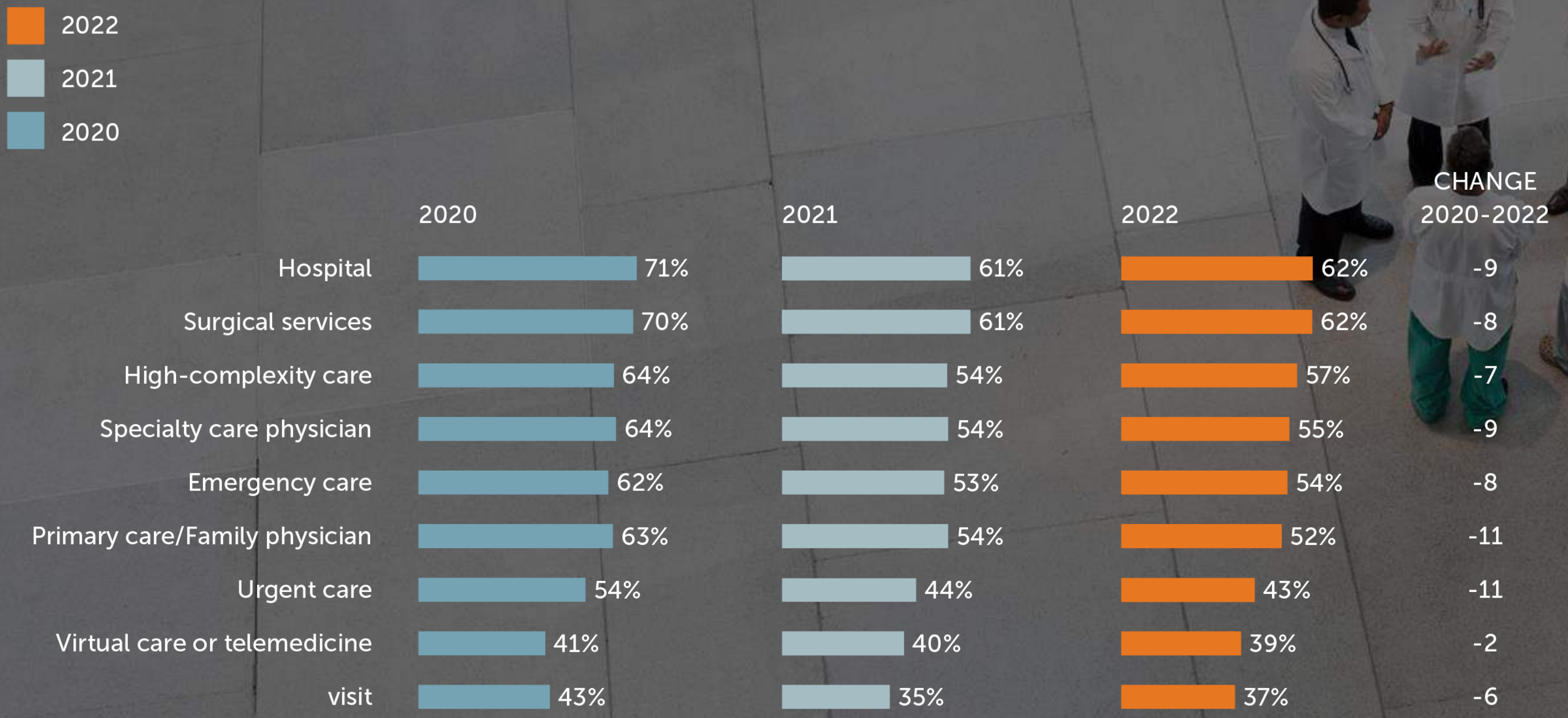
Data Health Engagement Index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence, and Advocacy



02

Local matters less and less

While people still prefer to use healthcare systems (over independents) across services – this preference has declined from pre-pandemic levels



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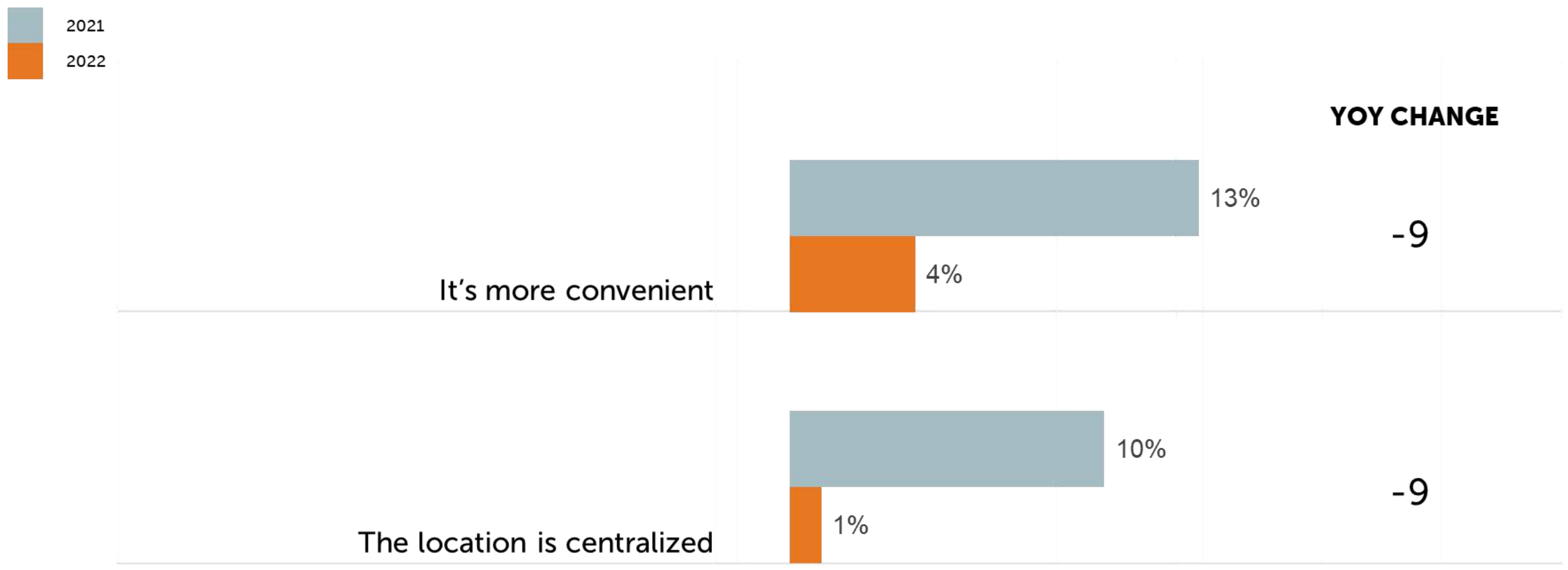
Fewer consumers are citing a centralized location and convenience as reasons to choose a health system



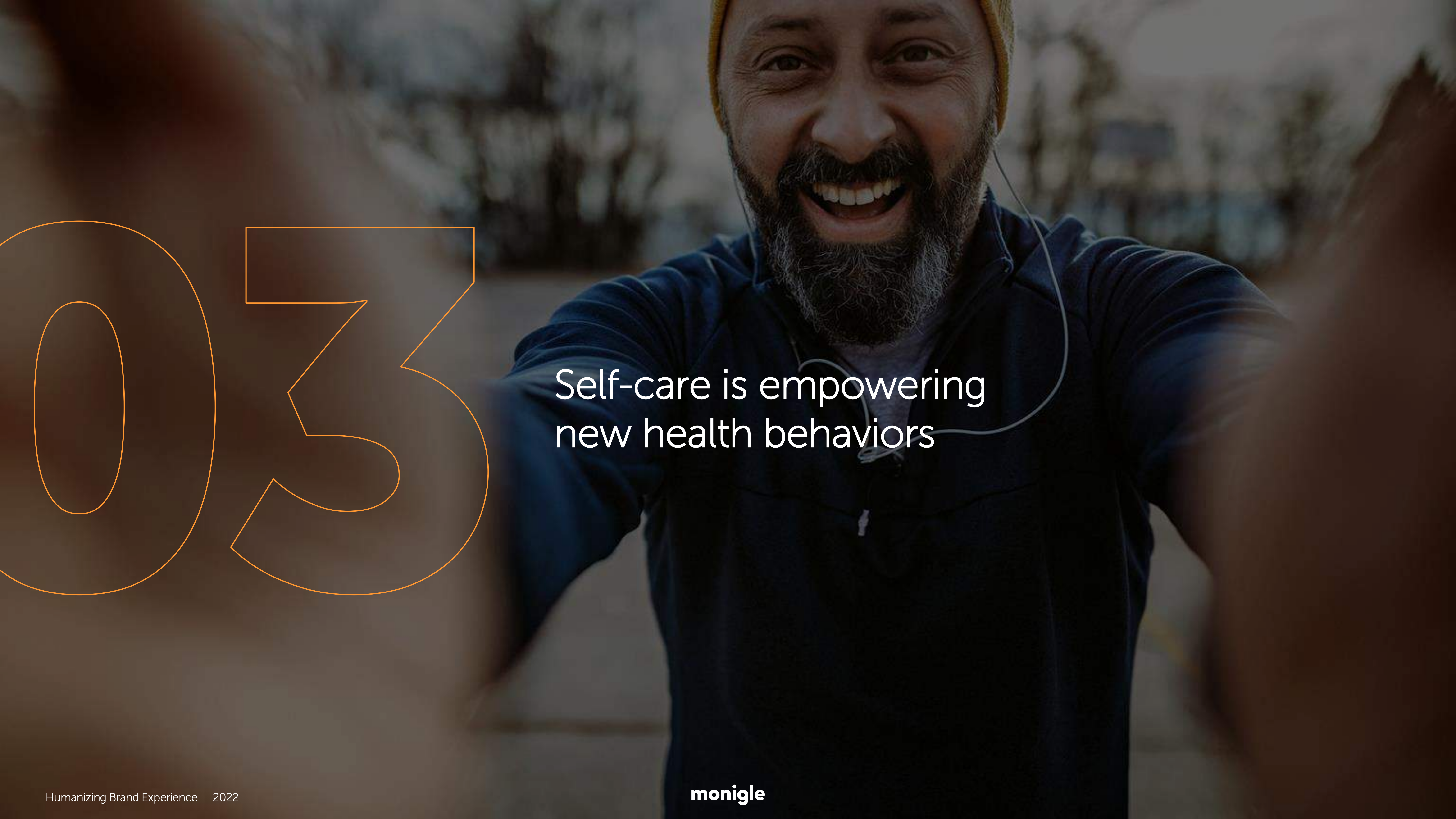
Base All U.S. nationally balanced respondents assigned to the systemness cell: 2021 (424) 2022 (490)
QBS4 More and more people today prefer to use health care systems for their health care over and above independent facilities. Why do you think this is? In your opinion, what are the benefits of using a health care system instead of an independent facility?
Data Coded verbatim

How to leverage systemness

Systems have more to offer than location and size. Here are the top four reasons today's consumers choose systems, plus what it means for your brand:

1. **The wide range of staff and specialists (31%):** Your people matter. Be sure to highlight their expertise and diversity.
2. **Easier to access records (13%):** Access includes more than just physical location. Simplifying EMRs is key.
3. **There are more resources (10%):** Showcase depth and breadth of offerings, services, and resources.
4. **Physicians communicate more effectively (9%):** Clear, empathetic communication is essential for great experiences.

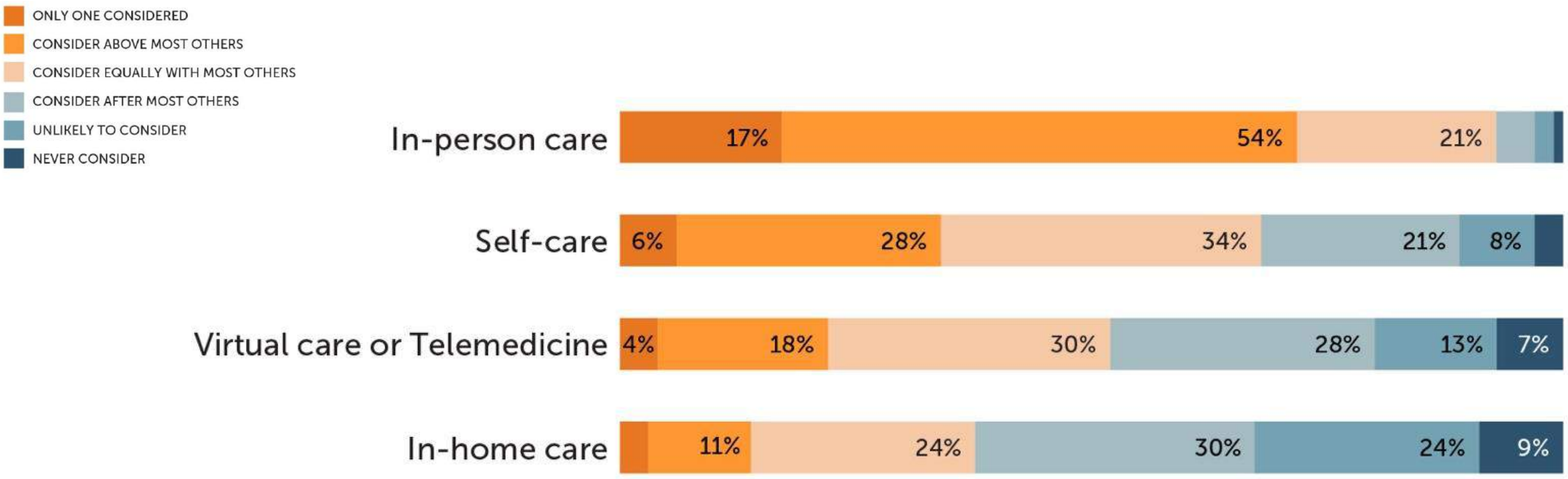
Base — All U.S. nationally balanced respondents assigned to the systemness cell: 2021 (424) 2022 (490)
QBS4 — More and more people today prefer to use health care systems for their health care over and above independent facilities. Why do you think this is? In your opinion, what are the benefits of using a health care system instead of an independent facility?
Data — Coded verbatim



03

Self-care is empowering new health behaviors

Consumers are now considering self-care and virtual care at ever increasing rates—with increases approaching in-person levels



Definitions

In-person care: at a doctor's office/hospital/medical facility

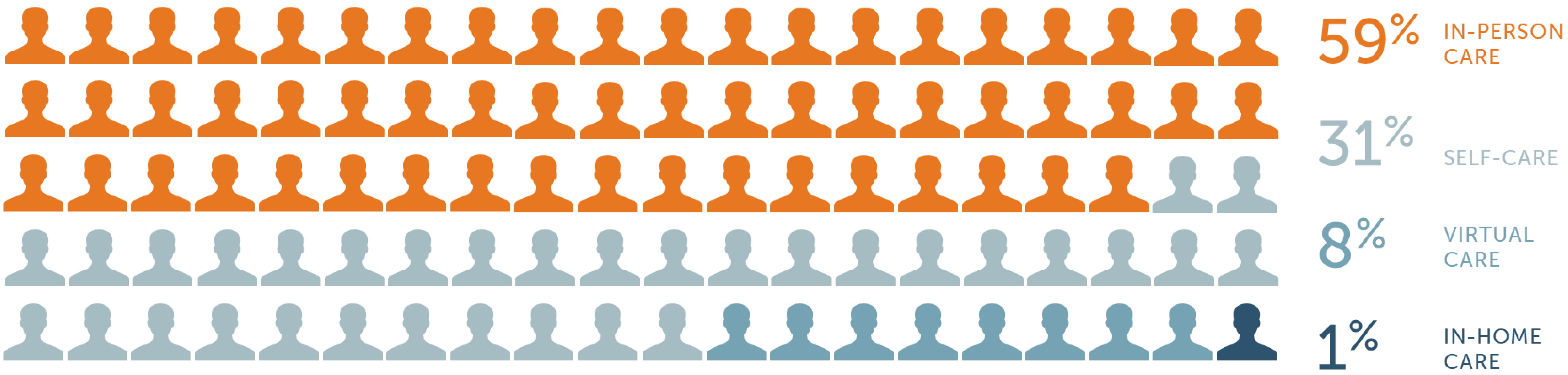
Virtual care or telemedicine: using online video, audio, and instant messaging to connect you remotely to a doctor/healthcare professional through your computer or mobile device

In-home care: a doctor/healthcare professional comes to your home

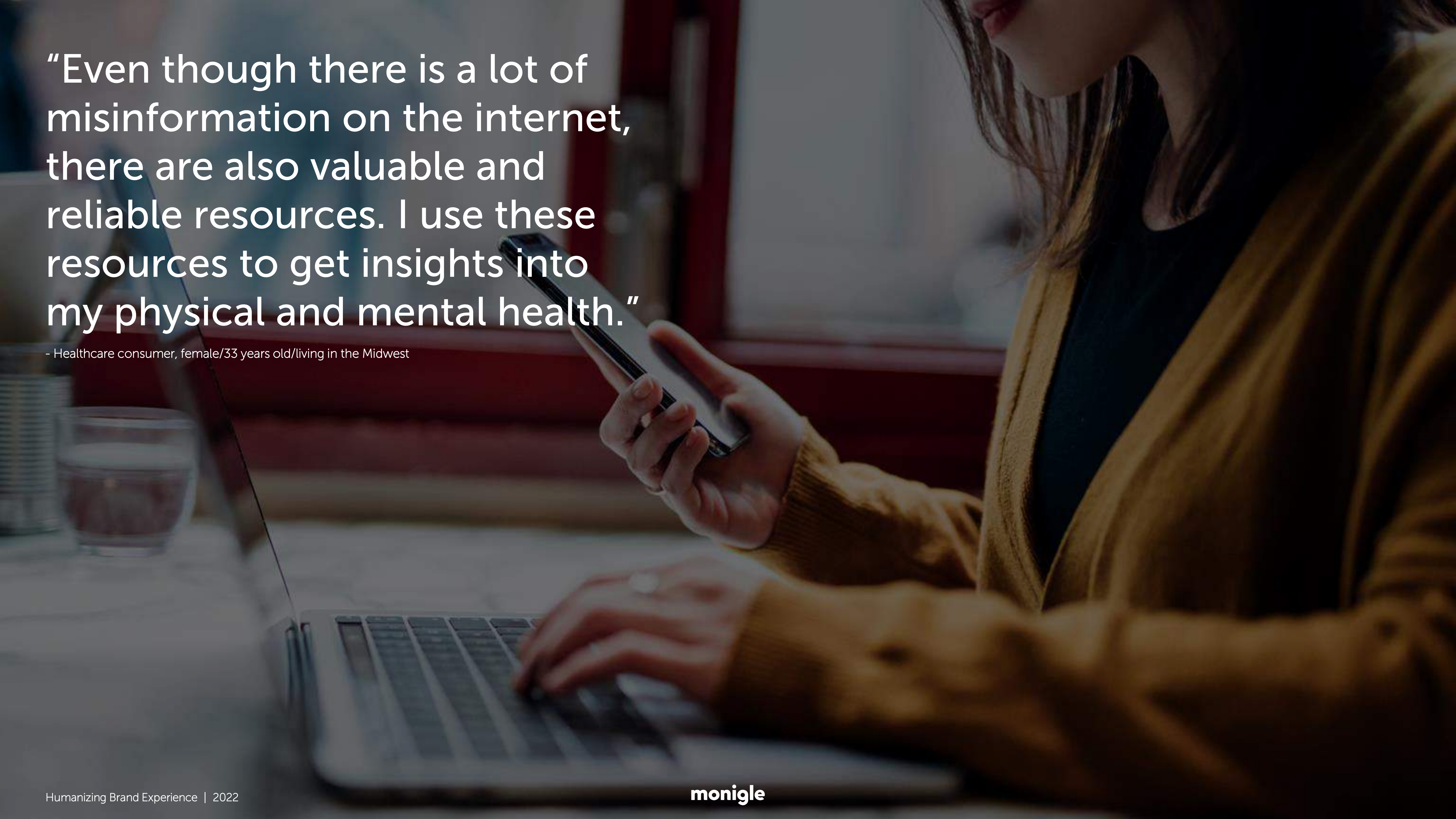
Self-care: you do you own research online to self-diagnose and manage your health

Base All U.S. nationally balanced respondents 2022 (1102)
B3 Which of these statements best describes how you feel about each of these ways to manage your health and receive care?
Data Selection frequency

One in three people now prefer to try self-care first before seeking in-person care from a provider



Base All U.S. nationally balanced respondents 2022 (1102)
B2 And what do you typically do first to manage your health or a health issue?
Data Selection frequency

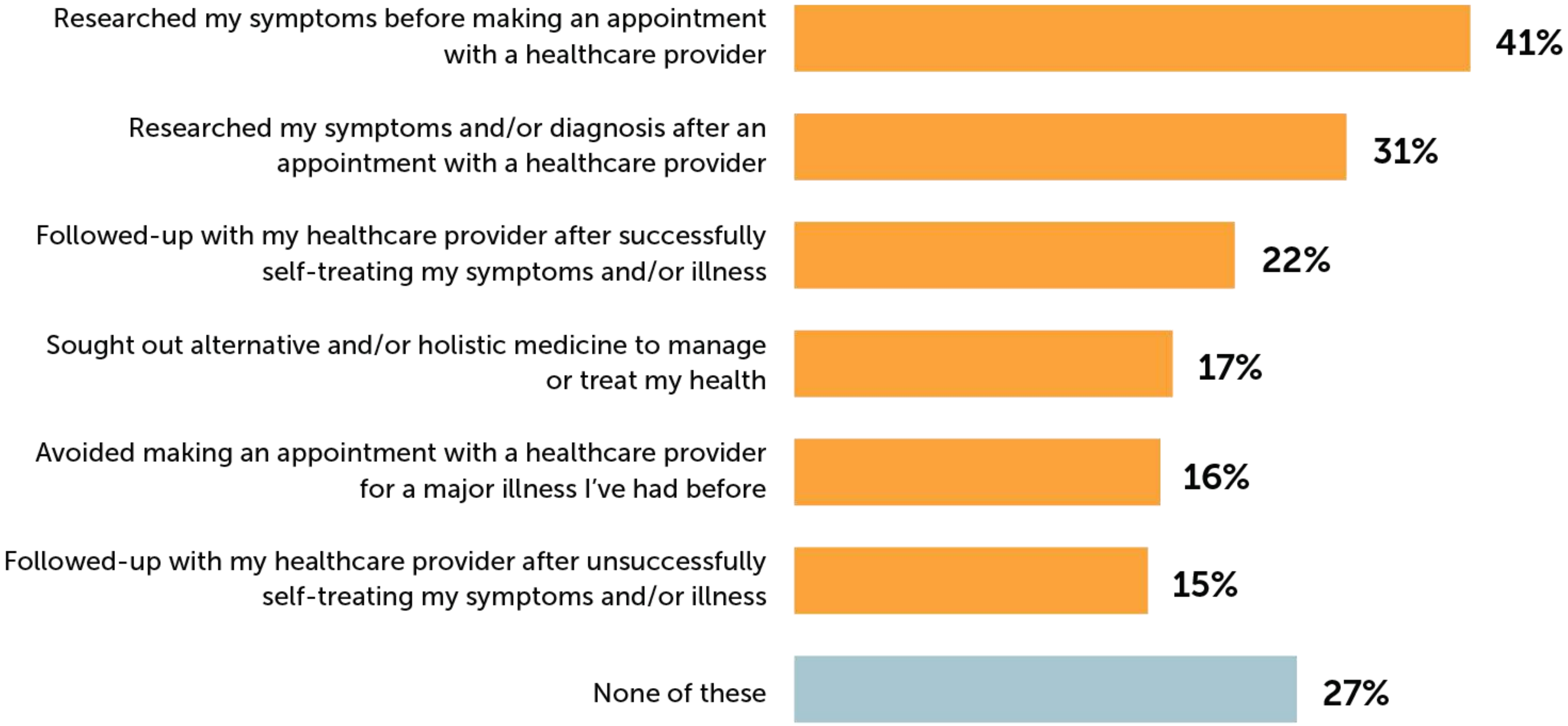


"Even though there is a lot of misinformation on the internet, there are also valuable and reliable resources. I use these resources to get insights into my physical and mental health."

- Healthcare consumer, female/33 years old/living in the Midwest

Get in on the content game

People continue to turn to online resources to manage their health



Base All U.S. nationally balanced respondents 2022 (1102)
B5 Which of the following have you done in the past year?
Data Selection frequency

Self-care means different things to different people

How does your brand bridge the gap?

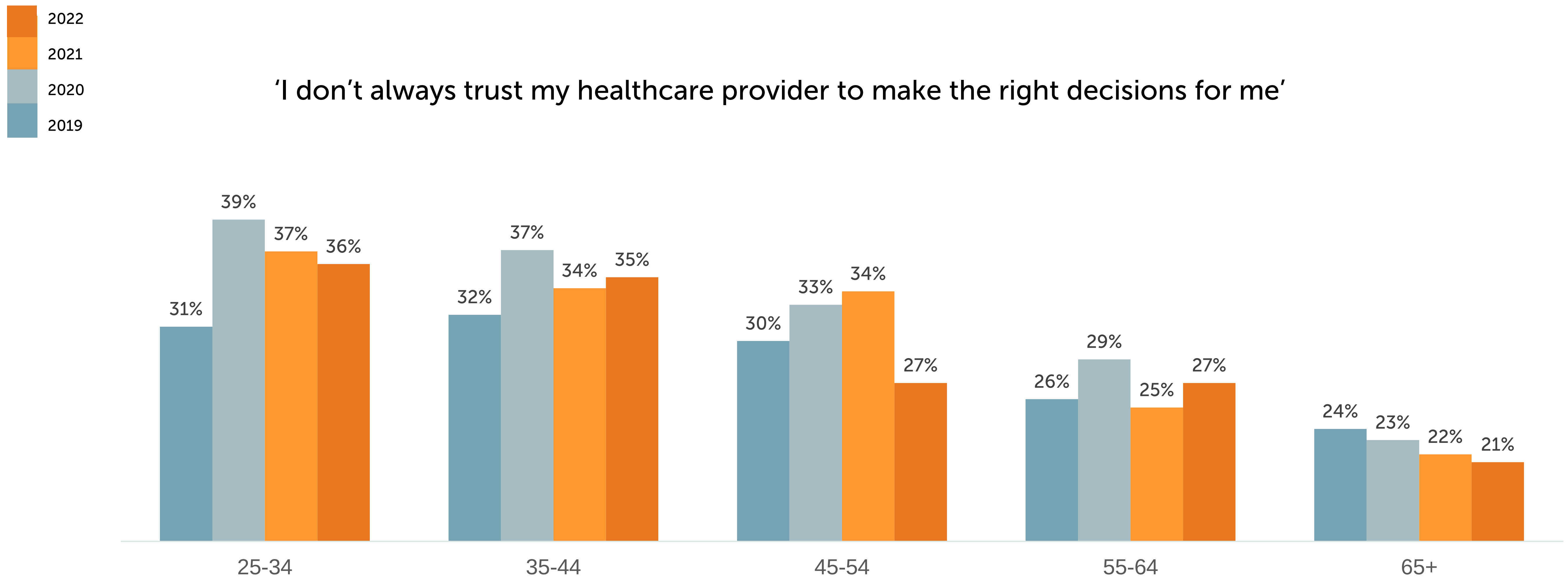
Self-care behaviors are more prominent among younger age groups

INDEX ≥ 120
INDEX ≤ 80

	AGE				
	21-34	35-44	45-54	55-64	65+
Researched my symptoms before making an appointment with a healthcare provider	117	110	127	92	64
Researched my symptoms and/or diagnosis after an appointment with a healthcare provider	112	104	122	84	92
Followed up with my healthcare provider after successfully self-treating my symptoms and/or illness	125	125	81	90	76
Sought out alternative and/or holistic medicine to manage or treat my health	142	95	119	96	56
Avoided making an appointment with a healthcare provider for a major illness I've had before	142	144	119	74	40
Followed up with my healthcare provider after unsuccessfully self-treating my symptoms and/or illness	135	116	110	90	66
None of these	47	70	75	135	157

Base 21-34 (207), 35-44 (247), 45-54 (158), 55-64 (238), 65+ (252), Chronic (637), Not Chronic (465), Children (313), No Children (447), <50k (415), 50-100k (403) 100k+ (234)
B5 Which of the following have you done in the past year?
Data Indices based on selection frequency

These generational differences are reflected in trust – those under 44 are less likely to trust providers to make the right decisions for them



Age	2019	2020	2021	2022
25-34	31%	39%	37%	36%
35-44	32%	37%	34%	35%
45-54	30%	33%	34%	27%
55-64	26%	29%	25%	27%
65+	24%	23%	22%	21%

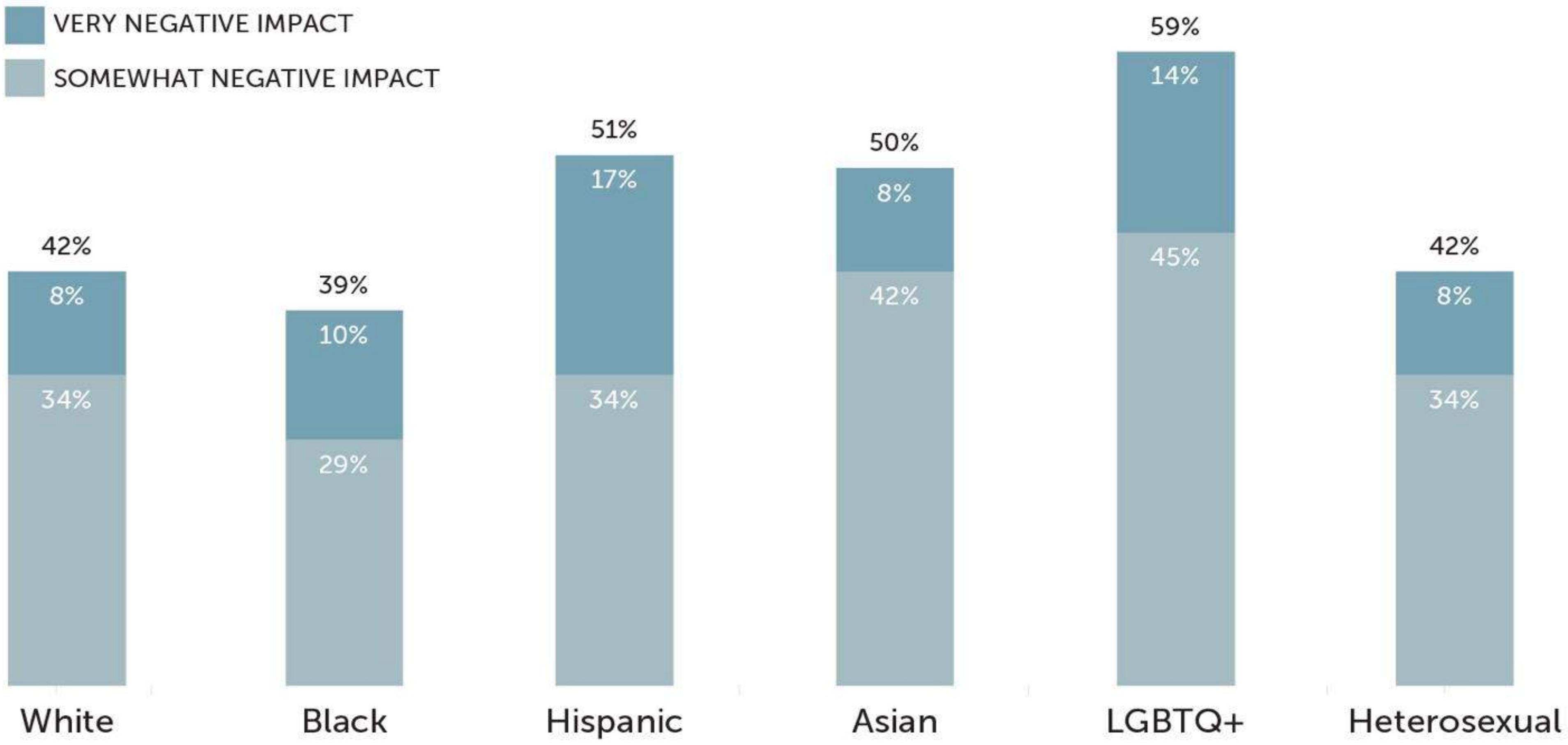
Base All U.S. nationally balanced respondents 2019 (2656), 2020 (3035), 2021 (3000), 2022 (3183)
QI1 First, we'd like to better understand how you think and feel about health care. Please select how much you agree or disagree with each statement
Data Top 2 Box Scores

04

The mental health movement is here

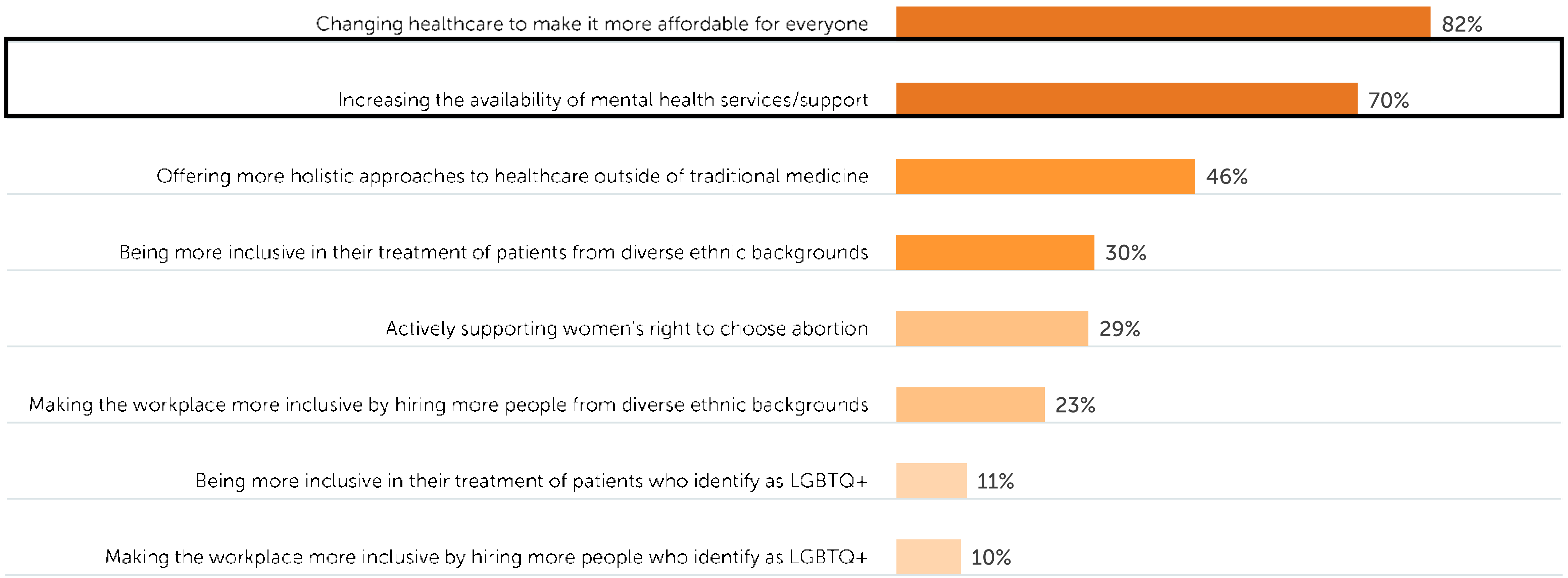

2 in 5
people are still struggling with poor mental health.

LGBTQ+, Hispanic and Asian communities continue to experience an inequitable share of the mental health burden



Base All respondents 2022 White (2600), Black (266), Hispanic (125), Asian (237), LGBTQ+ (179)
QF6 What impact has the Covid-19 pandemic had on your mental health?
Data Selection frequency. Only top 2 boxes shown

Increasing the availability of mental health services/support should be a high priority for healthcare organizations



Base All U.S. nationally balanced respondents 2022 (3183)
QF9 In your opinion, which of the following areas should health care organizations focus on most/least?
Data Percent of times each area ranked first "focus on most"

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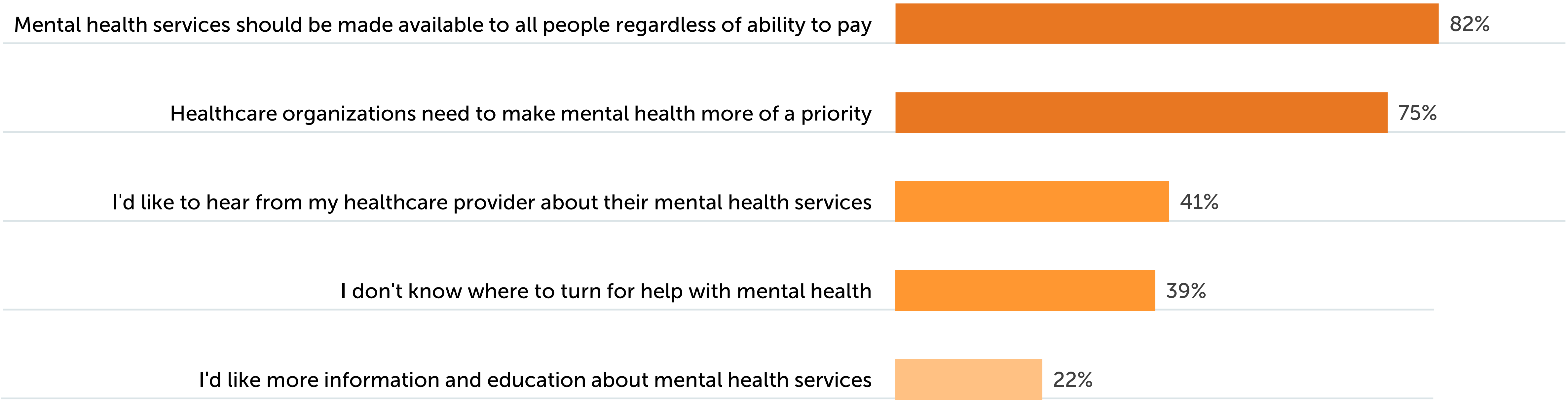
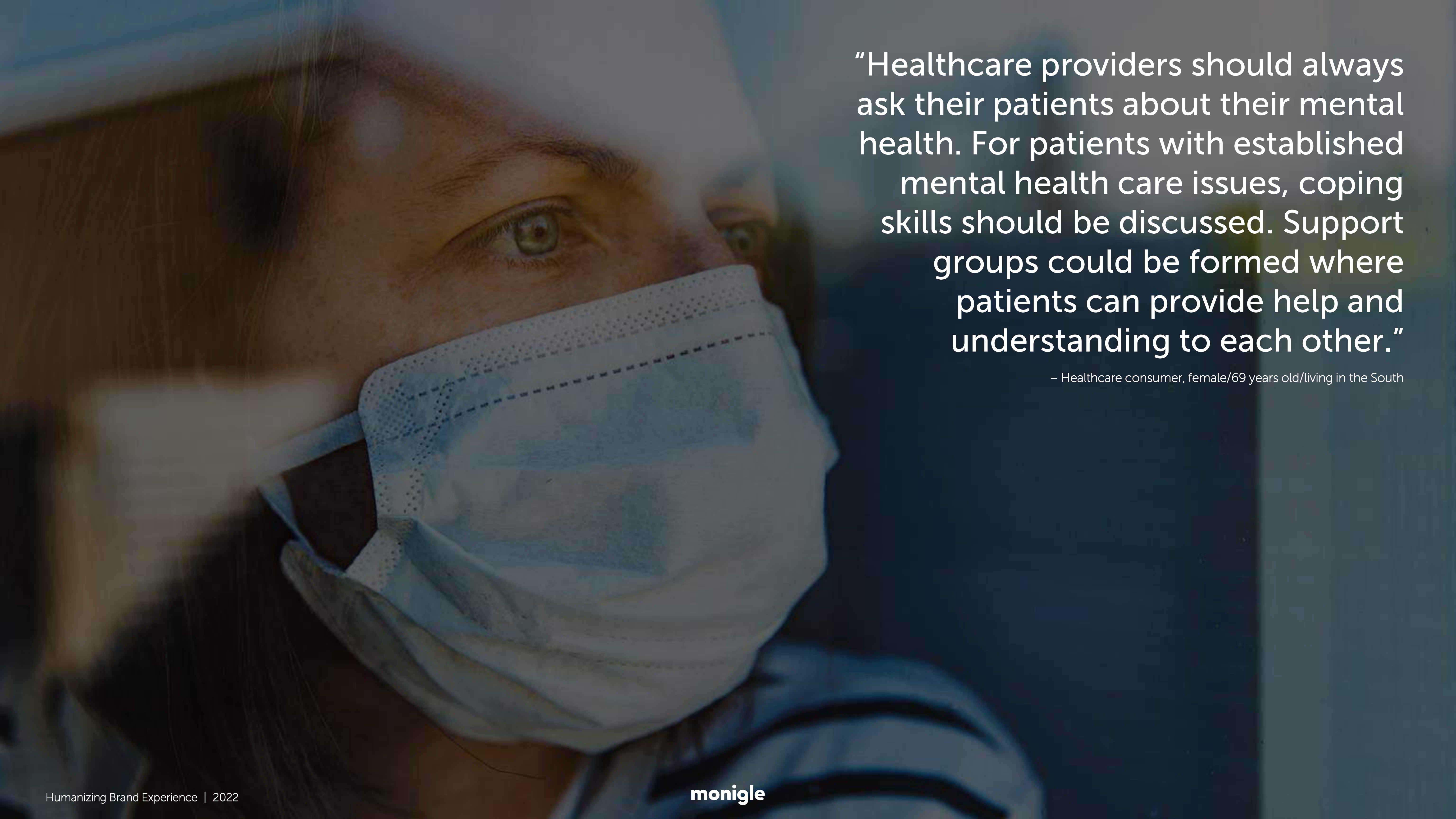
"All doctors [should] have some training in mental health to notice any indicators in their routine exams."

– Healthcare consumer, female/39 years old/living in the Midwest

People want mental health services to be made available to everyone regardless of ability to pay...and they want to hear more from you

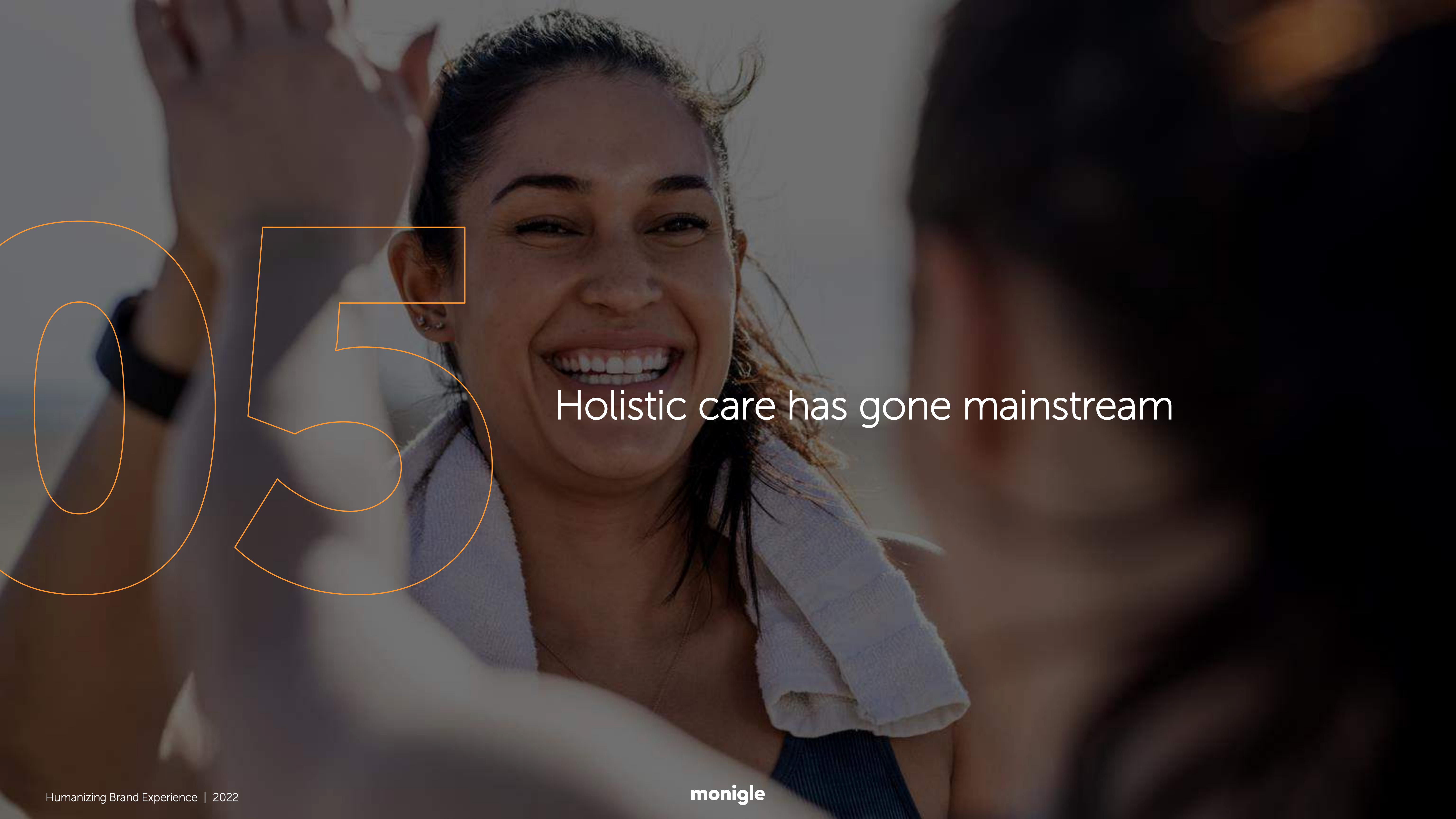


Base All U.S. nationally balanced respondents 2022 (3183)
QF8 How much do you agree or disagree with the following statements about mental health
Data Top 2 Box Scores (Somewhat agree + Strongly agree)



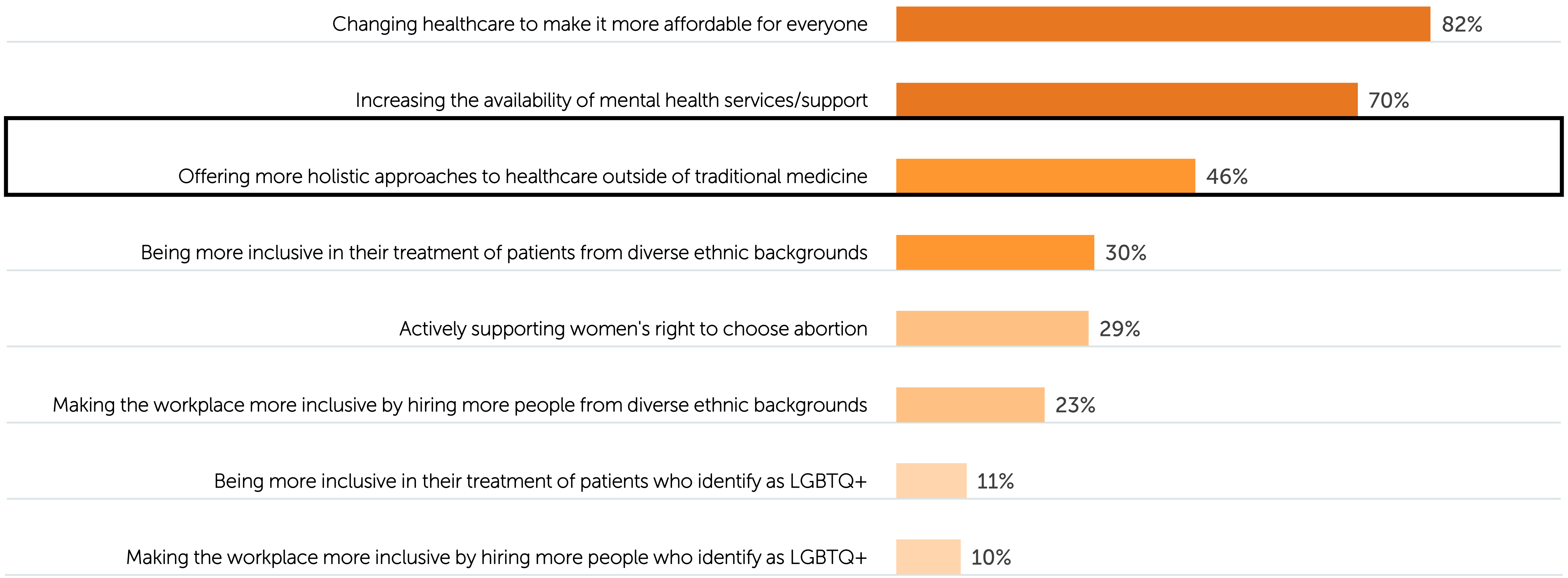
"Healthcare providers should always ask their patients about their mental health. For patients with established mental health care issues, coping skills should be discussed. Support groups could be formed where patients can provide help and understanding to each other."

– Healthcare consumer, female/69 years old/living in the South

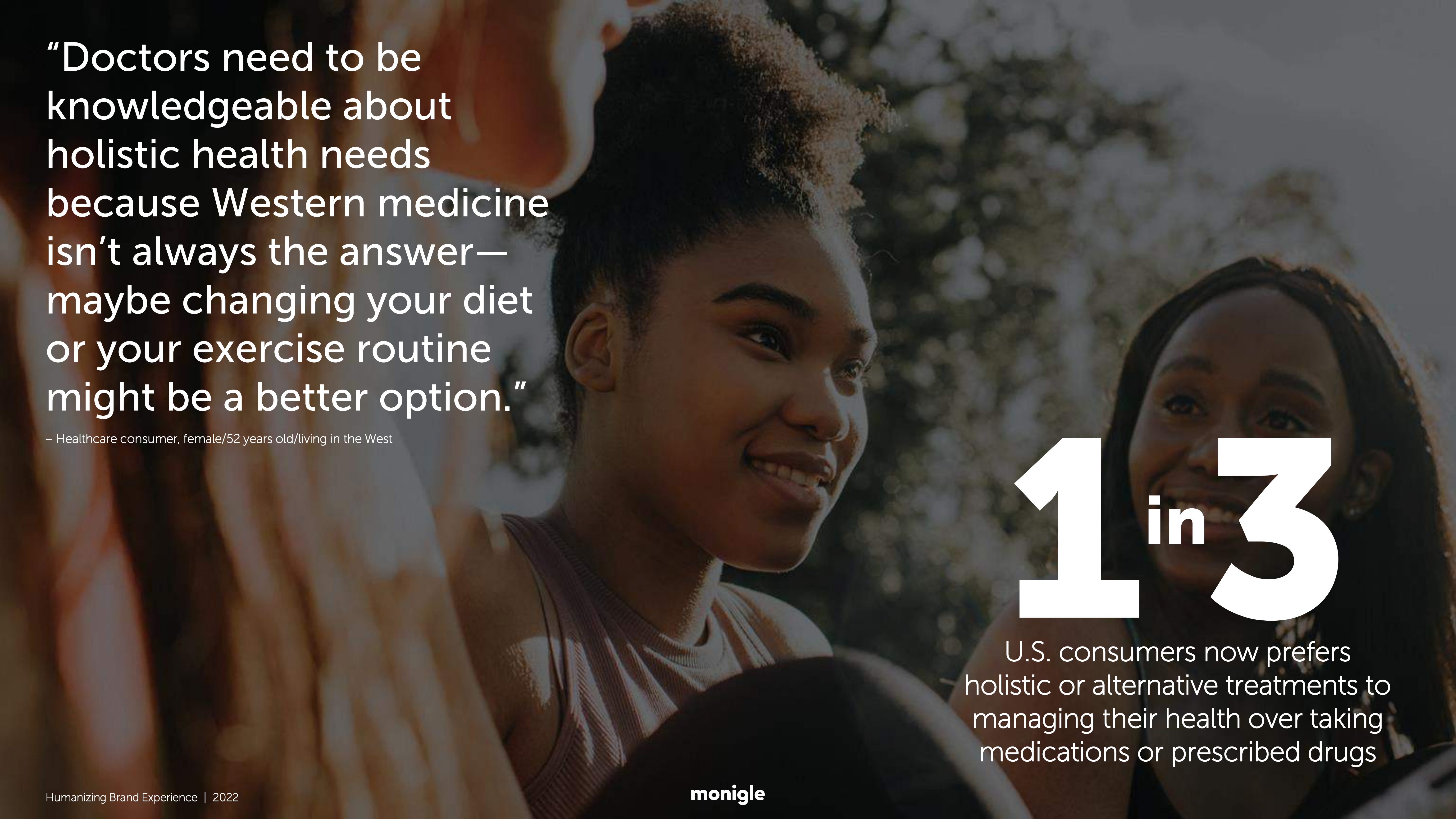


05 Holistic care has gone mainstream

Beyond affordability and mental health support, people want healthcare organizations to focus on offering more holistic approaches to care



Base All U.S. nationally balanced respondents 2022 (3183)
QF9 In your opinion, which of the following areas should health care organizations focus on most/least?
Data Percent of times each area ranked first "focus on most"



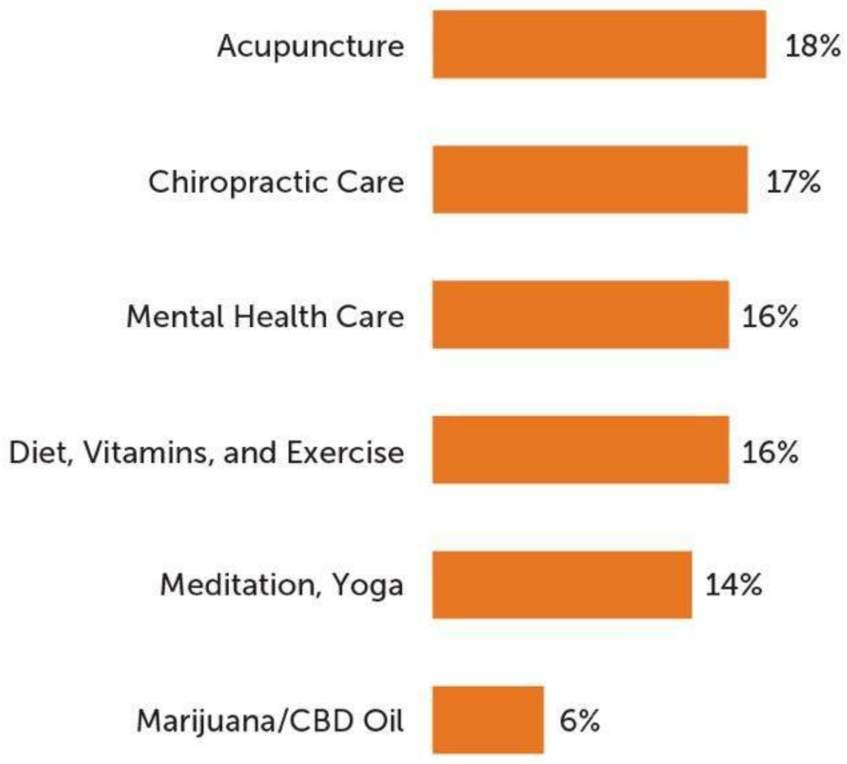
"Doctors need to be knowledgeable about holistic health needs because Western medicine isn't always the answer—maybe changing your diet or your exercise routine might be a better option."

– Healthcare consumer, female/52 years old/living in the West

1 in 3

U.S. consumers now prefers holistic or alternative treatments to managing their health over taking medications or prescribed drugs

People would like to see more holistic services offered by healthcare organizations including those most commonly mentioned below

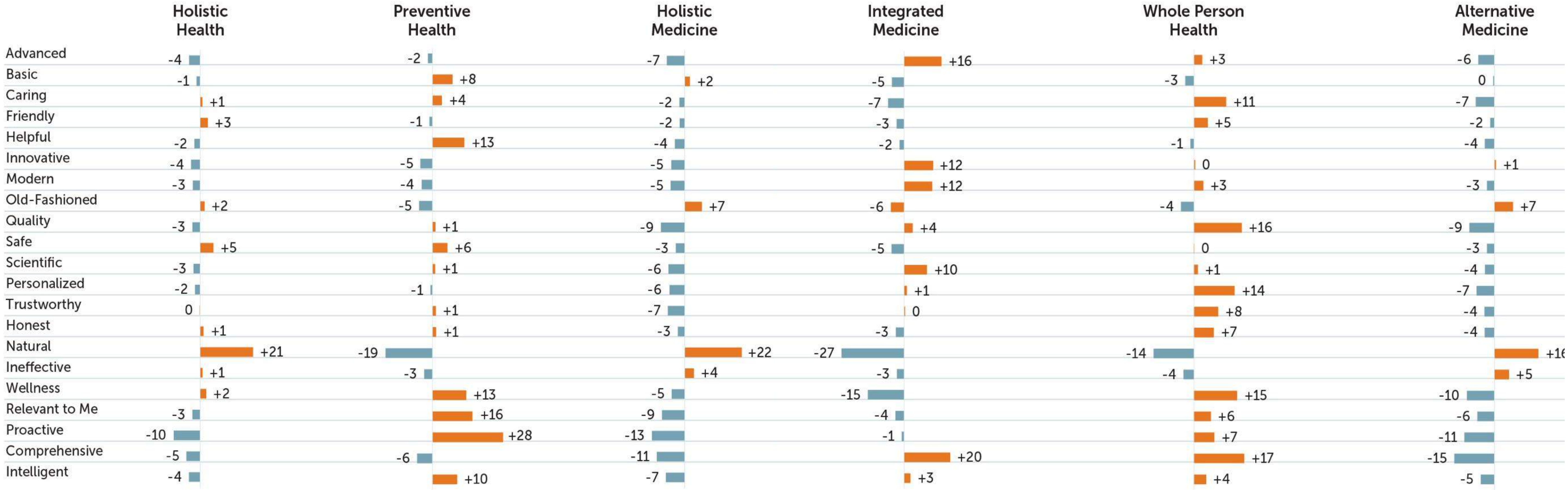


Base All U.S. nationally balanced respondents 2022 in Holistic Health cell (440)
QBS1 In your opinion, how could health care organizations better support your holistic health needs? What new services and experiences would you like to see them offer to treat the whole person - mind,
body and spirit - beyond traditional medicine? How else can they adapt to be a better holistic health partner to you?
Data Coded Verbatim. Service mentions only shown

"Doctors should be allowed to discuss, treat, and offer alternative or natural ways to treat illness, disease, etc. In the U.S. doctors are required to treat with prescription medicines instead of talking to patients about supplements, food, etc., that could help a patient feel better naturally. I would like to see a healthcare group that included nutritionists with all of the usual doctors. I would like a medical group that also offered the ability for doctors to treat patients with natural substances/supplements in instances where they could be helpful. For example, a doctor could tell a patient to take vitamin C and zinc for a bad cold, instead of a prescription drug."

– Healthcare consumer, female/60 years old/living in the Midwest

Nomenclature matters. Whole Person Health > Holistic Health



Base All U.S. nationally balanced respondents 2022 (500) per nomenclature cell
QV1-6 Which of these words do you associate with [NOMENCLATURE]?
Data Gap data based on value selection frequency minus average value selection frequency across all nomenclature tested

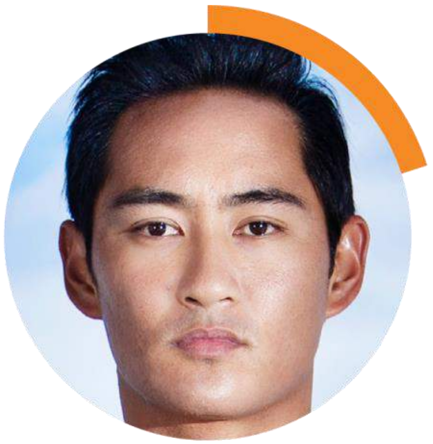
06

New consumer segments are emerging

We segment people based on their relationship with healthcare, not biometrics or demographics.

Our latest attitudinal and behavioral segmentation uncovered 7 segments of the population – each with their unique needs and healthcare challenges

Four segments identified back in 2019 still exist today…



WELLNESS INFLUENCERS
20% OF THE POPULATION

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

HABITUAL STRUGGLERS
17% OF THE POPULATION

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

TRUSTING TRADITIONALISTS
13% OF THE POPULATION

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

DOCTOR DODGERS
11% OF THE POPULATION

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

...and three segments were uncovered in 2022 via this analysis

UNAPOLOGETICALLY UNHEALTHY
11% OF THE POPULATION

Leaving your health to chance might seem like a questionable strategy in 2022, but that's exactly what the Unapologetically Unhealthy have done their entire lives. And they're still here. Living their best life. Proving us health nerds wrong. These stubborn creatures of habit aren't likely to change their ways now—diet, exercise, and preventive care are not words in their vocabulary. They'll begrudgingly agree to a doctor's visit in person every now and then if they are sick or need a bit of maintenance on that condition they regularly brush off. This live-fast, die-young segment didn't die. And they are laughing at as all. Just don't ask them for health advice as they will probably pass you the whiskey bottle.

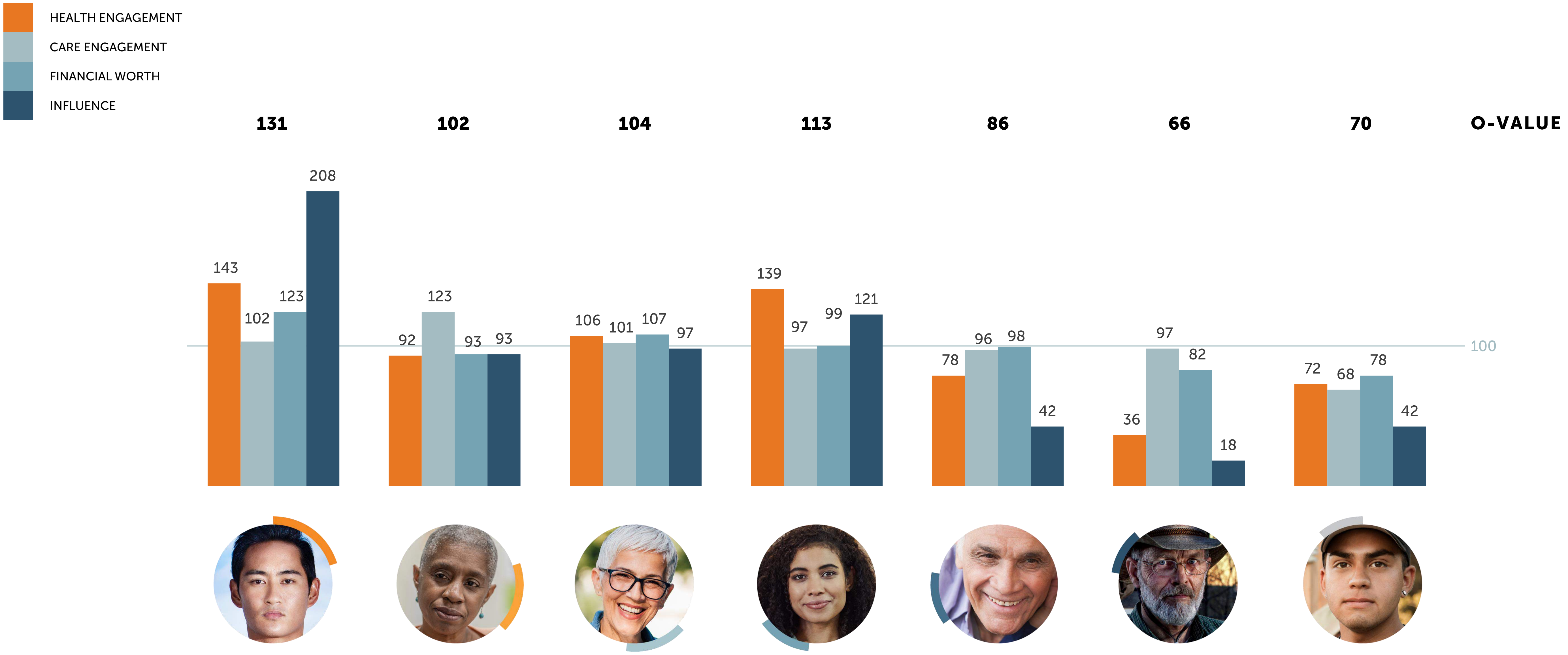
POSITIVE PREVENTIVES
15% OF THE POPULATION

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

WHOLE-HEALTH MANAGERS
13% OF THE POPULATION

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

Wellness Influencers are most valuable to healthcare brands while other segments may be worth targeting depending on your brand positioning



Base All U.S. nationally balanced respondents 2022: Wellness Influencers (220), Habitual Strugglers (187), Positive Preventatives (169), Whole-Health Managers (146), Trusting Traditionalists (144), Unapologetically Unhealthy (120), Doctor Dodgers (116)

Data Indices based on a composite score. O-value based on average of indices across health engagement, care engagement, financial worth and influence scores

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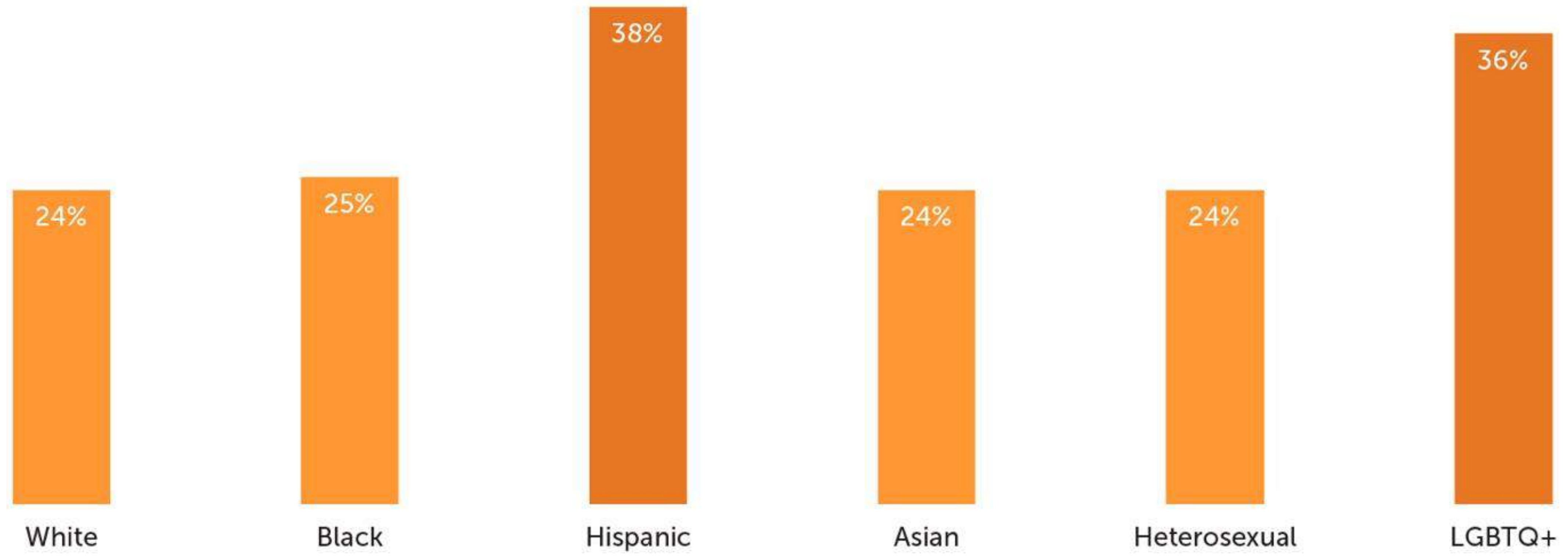
07 Healthcare is not inclusive enough

LGBTQ+ and Hispanic individuals are significantly more likely to have delayed care that they needed in the last 12 months

% of consumers who claim to have delayed care that was recommended to them or that they thought they needed



Base All respondents 2022 White (2600), Black (266), Hispanic (125), Asian (237), Heterosexual (2898), LGBTQ+ (179)
QF1 In the last 12 months, have you delayed getting health care that was recommended too you or that you thought you needed?
Data Selection Frequency ' Yes '

People delay care for different reasons, although non-white consumers consistently cite lack of time as a reason they have delayed care

	White	Black	Hispanic	Asian	Heterosexual	LGBTQ+
Cost/too expensive	39%	30%	55%	29%	39%	43%
I didn't feel safe getting care during COVID-19	27%	31%	15%	38%	27%	35%
I don't like going to the doctor	24%	15%	21%	19%	22%	20%
Difficulty getting an appointment	19%	22%	21%	12%	19%	25%
Not enough time	17%	25%	28%	24%	18%	17%
No availability/space due to COVID-19	16%	6%	19%	17%	16%	15%
Issues with health insurance	15%	15%	26%	10%	14%	17%
Symptoms improved/disappeared	13%	10%	17%	17%	13%	11%
Other	10%	4%	2%	3%	8%	17%

Base All respondents who delayed health care in the past 12 months White (638), Black (67), Hispanic (47), Asian (58), Heterosexual (703), LGBTQ+ (65)
QF2 Why have you delayed getting health care?
Data Selection Frequency

LGBTQ+

If you want to make healthcare more inclusive for LGBTQ+ consumers, it's going to take more than hanging up a rainbow flag during Pride. This group needs concrete changes, ranging from better educating staff to hiring more LGBTQ+ providers. Correct pronoun usage and diverse gender options on paperwork are proof of how even little shifts can go a long way toward making people feel more comfortable and valued.

"ENSURE STAFF ARE EDUCATED ON OUR HEALTH NEEDS. DON'T ASSUME EVERYONE'S STRAIGHT. IF THERE ARE DOCTORS OR SPECIALISTS WHO ARE OPENLY LESBIAN OR GAY, ALLOW THEM TO INCLUDE THAT IN THEIR BIOS/ MARKETING MATERIALS FOR THOSE OF US WHO PREFER TO SEE A PRACTITIONER WHO'LL HAVE A PERSONAL UNDERSTANDING OF OUR EXPERIENCE."

– Healthcare consumer, identifies as female /LGBTQ+/58 years old/living in the West

2022 how healthcare organizations can be more inclusive of LGBTQ+ consumers

2 IN 5

LGBTQ+ CONSUMERS FEEL THAT HEALTHCARE ORGANIZATIONS CAN DO MORE TO BE INCLUSIVE OF THE COMMUNITIES THEY SERVE.

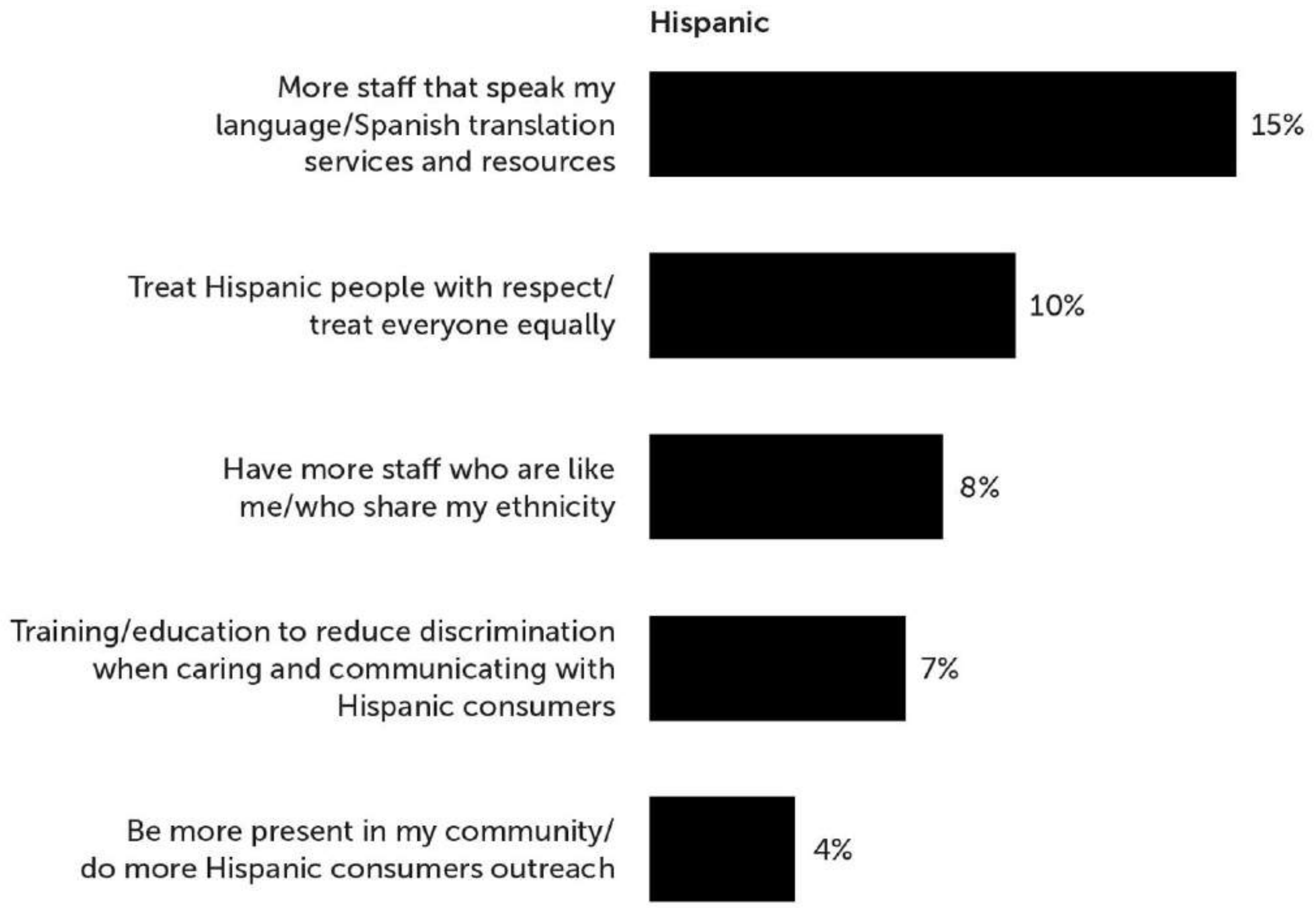
HISPANIC

Hispanic consumers face disproportionate barriers to care, including cost to access and language barriers. Healthcare brands must hire Spanish-speaking staff and offer translation services to improve experiences for this group, in addition to sensitivity training and education on Hispanic culture.

"HISPANIC PEOPLE ARE OFTEN SCARED TO SEEK HELP IN ANY HEALTHCARE FACILITY, AFRAID OF BEING TURNED AWAY. LANGUAGE IS ANOTHER BIG BARRIER. WHY NOT HAVE MORE PEOPLE WHO ARE BILINGUAL TO OFFER THESE SERVICES?"

– Healthcare consumer, Hispanic/female/49 years old/living in the South

2022 how healthcare organizations can be more inclusive of Hispanic consumers

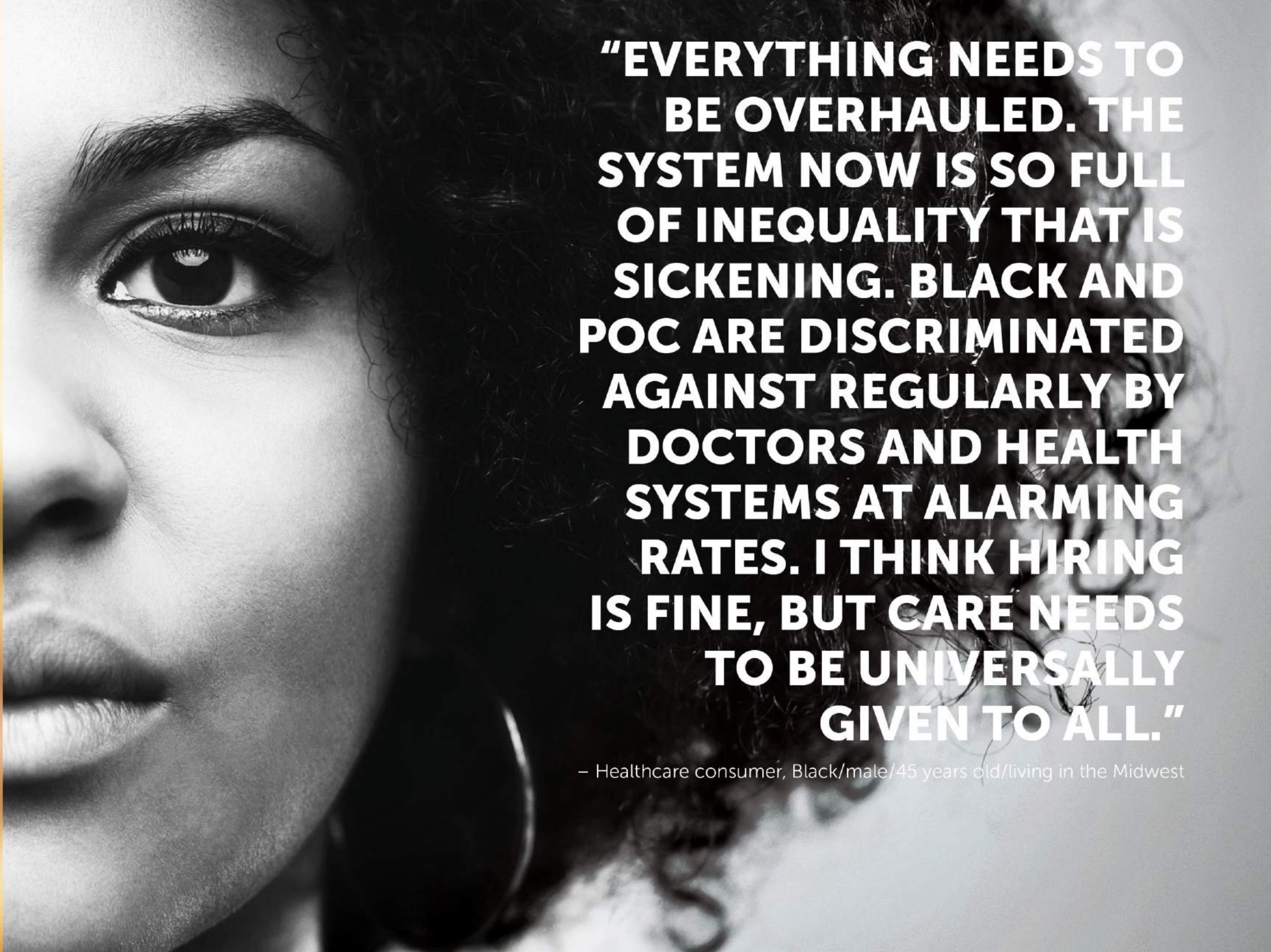


HISPANIC CONSUMERS ARE MORE LIKELY TO AVOID CARE, EVEN WHEN THEY NEED IT.

LACK OF TRUST IS AN ISSUE, WITH MORE HISPANIC CONSUMERS SAYING THEY DON'T ALWAYS TRUST THEIR PROVIDER THAN OTHER GROUPS.

BLACK

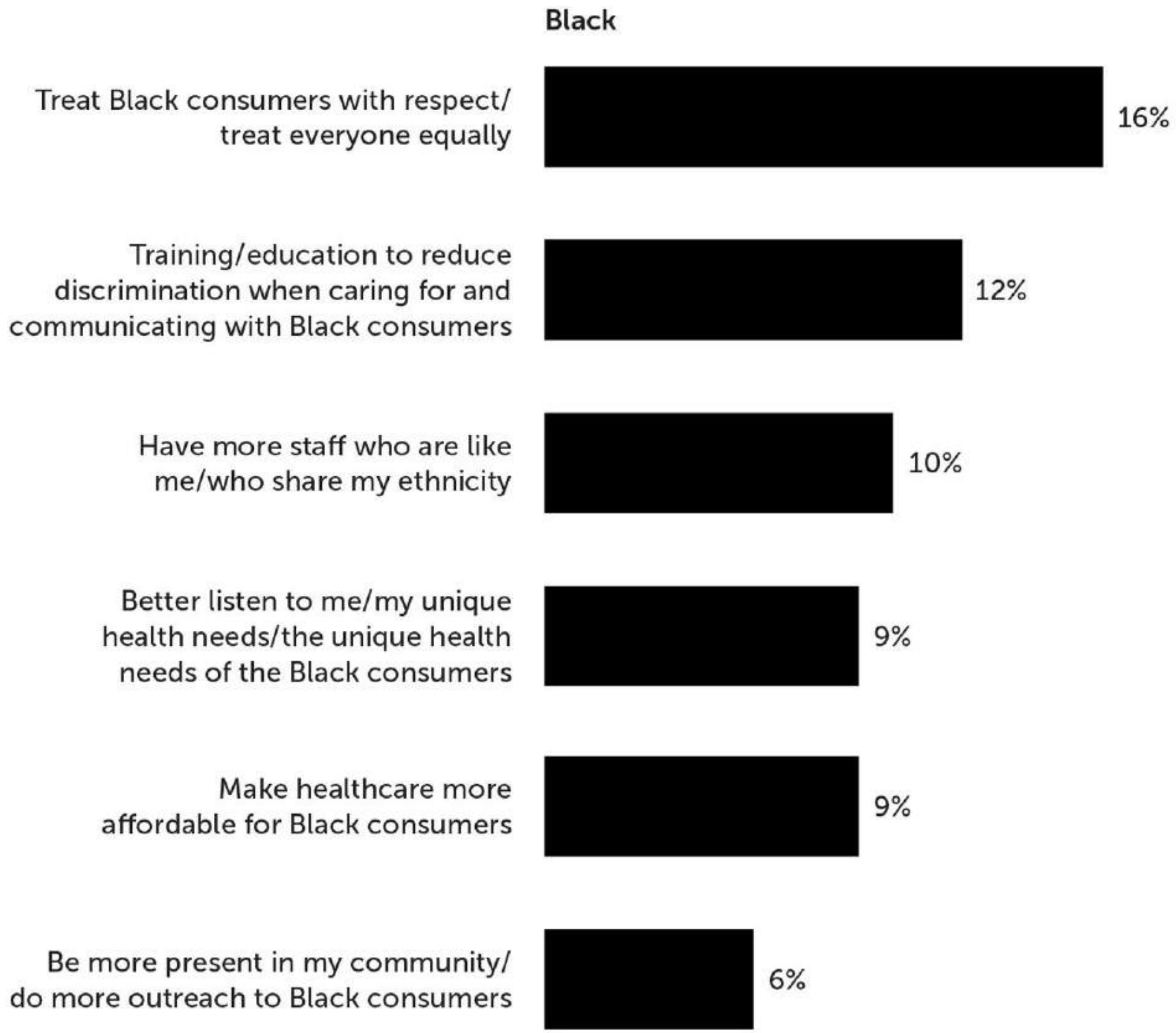
Black consumers face unique challenges when it comes to healthcare. These consumers want healthcare systems to be more respectful, particularly when it comes to listening to their concerns and believing what they have to say. To improve experiences for this audience requires that healthcare brands increase awareness and invest in training for staff on Black people's unique needs and experiences.



"EVERYTHING NEEDS TO BE OVERHAULED. THE SYSTEM NOW IS SO FULL OF INEQUALITY THAT IS SICKENING. BLACK AND POC ARE DISCRIMINATED AGAINST REGULARLY BY DOCTORS AND HEALTH SYSTEMS AT ALARMING RATES. I THINK HIRING IS FINE, BUT CARE NEEDS TO BE UNIVERSALLY GIVEN TO ALL."

– Healthcare consumer, Black/male/45 years old/living in the Midwest

2022 how healthcare organizations can be more inclusive of Black consumers



BLACK CONSUMERS SET MORE HEALTHCARE GOALS AND VALUE HOLISTIC AND INNOVATIVE CARE APPROACHES MORE THAN OTHER GROUPS.

PROVIDED THEY HAVE A GOOD EXPERIENCE, BLACK CONSUMERS FEEL GREATER PEACE OF MIND FROM CARE THAN OTHERS.

ASIAN

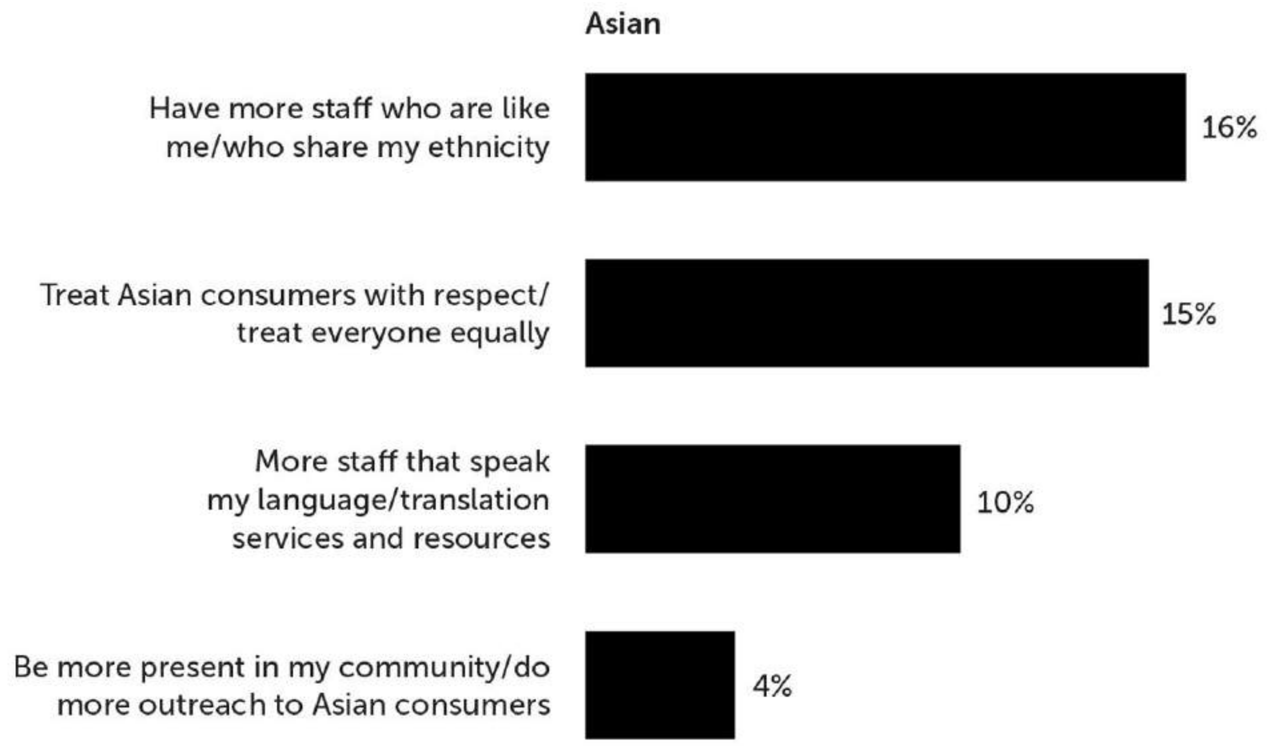
Asian consumers have faced outsized challenges, discrimination, and hate this year—and they feel less safe getting healthcare than other consumer groups as a result.

Not only is it our ethical imperative to make these consumers feel welcome and comfortable, it is also key to brand reputation. Asian consumers are the most influential group and are willing to spend more for the best care. They are also likely to read more about health and wellness topics.

"HEALTHCARE ORGANIZATIONS NEED TO BE SURE TO FOCUS THEIR ATTENTION ON HIRING NON-WHITE, LOCAL PEOPLE WHO ARE FAMILIAR WITH LOCAL CULTURE AND WAYS OF DOING THINGS. IN MY PAST EXPERIENCE, MENTAL HEALTH CENTERS WHOSE STAFF WERE ALL OR ALMOST ALL WHITE DID A GREAT DISSERVICE TO MINORITY INDIVIDUALS AND THEIR FAMILIES."

– Healthcare consumer, Asian/male/70 years old/living in the West

2022 how healthcare organizations can be more inclusive of Asian consumers

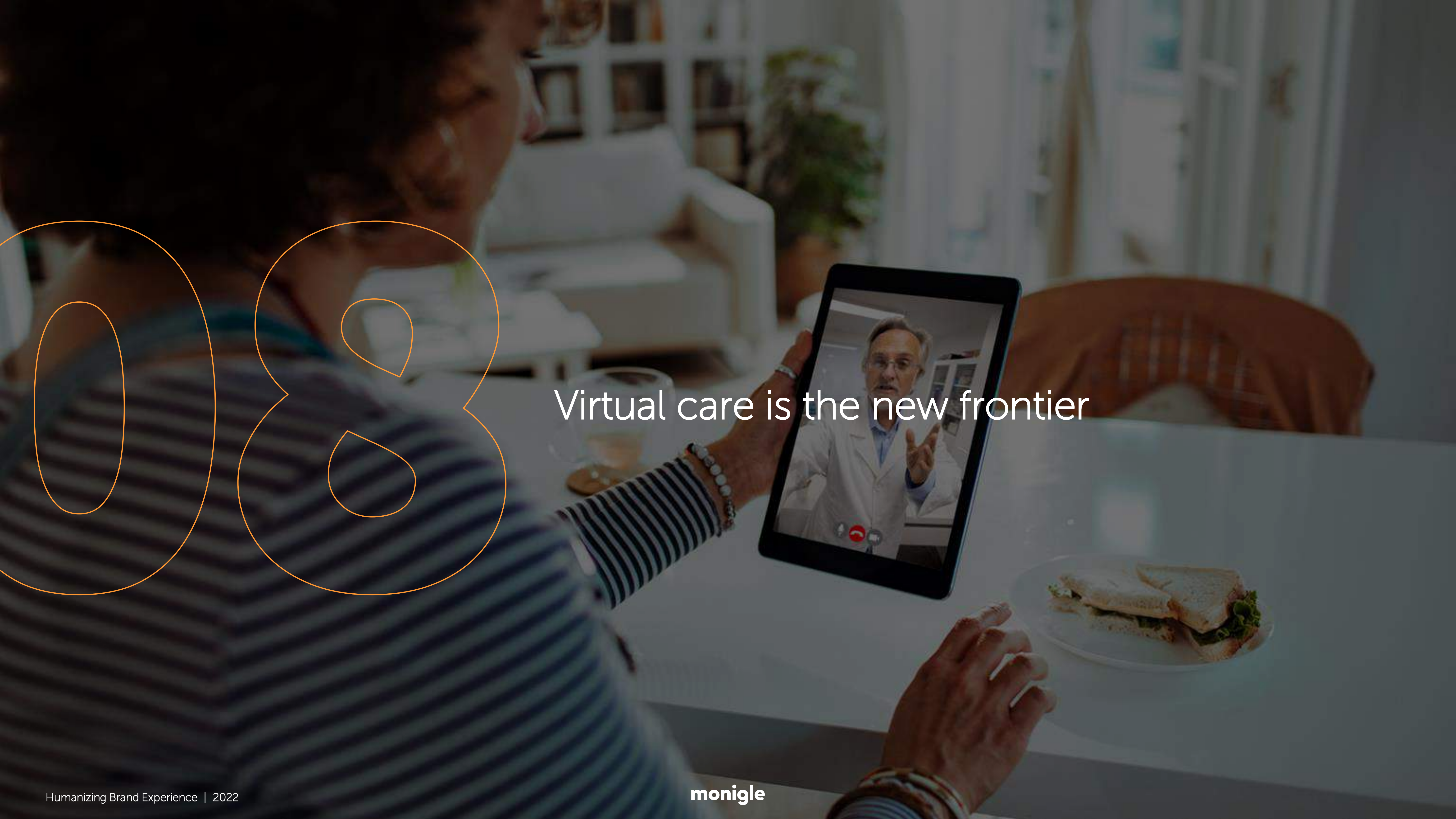


ASIAN CONSUMERS WERE SIGNIFICANTLY MORE LIKELY TO CITE SAFETY CONCERNS AS A REASON THEY DELAYED CARE IN THE LAST YEAR.

Let's take a look at the top 10 brands most committed to improving diversity and inclusion

Top 10 brands that are "most committed to improving diversity and inclusion" according to consumers

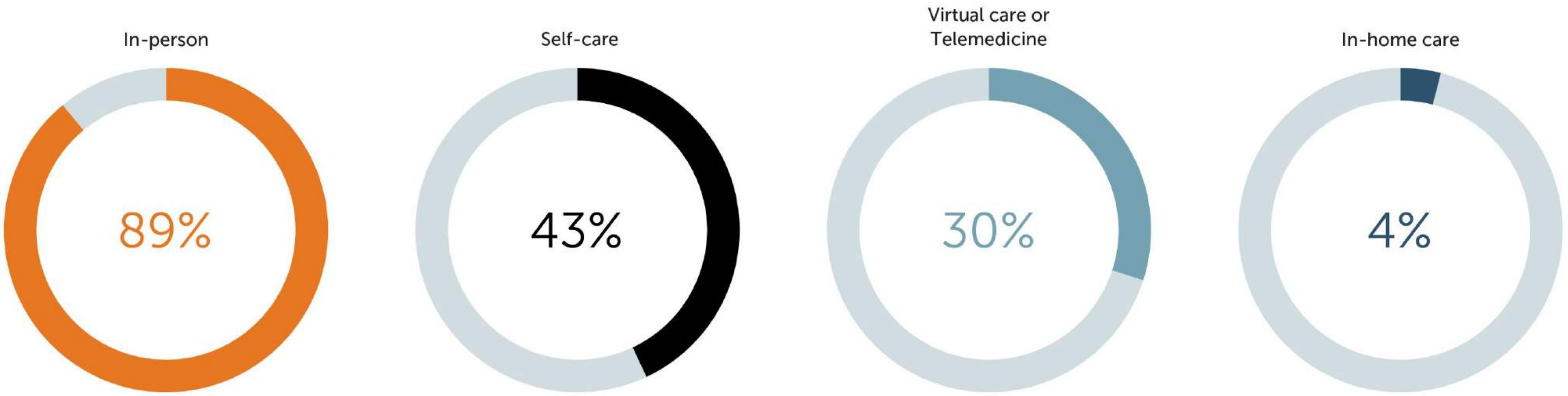
Rank	Brand
1	West Hills Hospital and Medical Center
2	UCSF Medical Center
3	UC Davis Health
4	Valley Health System
5	Memorial Healthcare System
6	University of Michigan Health
7	The Ohio State University Wexner Medical Center
8	UCLA Health
9	Kadlec
10	HCA Houston Healthcare



08 Virtual care is the new frontier

monigle

1 in 3 consumers now use virtual care/telemedicine to manage their health and receive care



Base All U.S. nationally balanced respondents 2022 (1102)
B1 In what ways do you manage your health and receive care?
Data Selection frequency

“Virtual care should be made a permanent option for anyone needing healthcare of any kind. I find that I’m more comfortable and feel safer when I can stay in my own home for the majority of my appointments.”

- Healthcare consumer, female/46 years old/living in the Midwest

Virtual care is key channel for reaching a younger demographic

INDEX ≥ 120

INDEX ≤ 80

	AGE					CHILDREN IN HOUSEHOLD	
	21-34	35-44	45-54	55-64	65+	Yes	No
In-person care	89	96	104	106	106	95	102
Self-care	118	96	106	108	77	106	97
Virtual care	112	141	95	89	63	121	91
In-home care	169	213	48	53	10	193	58

Base All U.S. nationally balanced respondents 2022: 21-34 (207), 35-44 (247), 45-54 (158), 55-64 (238), 65+ (252), Children (313), No Children (447)
B1 In what ways do you manage your health and receive care?
Data Indices based on selection frequency

We can still do better when it comes to the virtual care experience

We went ahead and set some goals for you

They won't be easy to achieve, but this is the type of work it will take to humanize virtual care experiences.

GOAL #1: Instant access to care

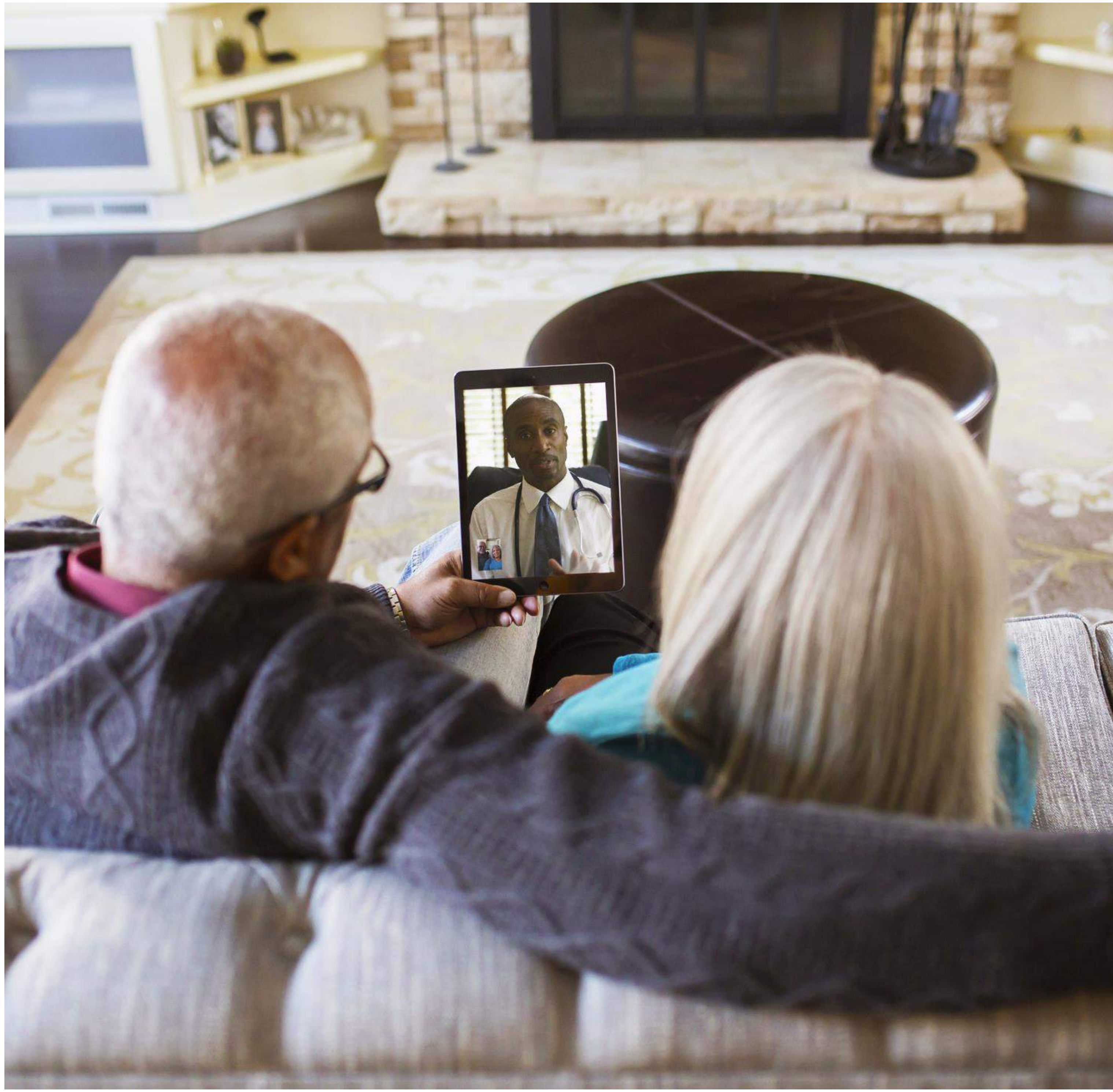
When consumers need care, they want it now. That means 24/7 support, no wait time, and open-the-app-and-go type of care.

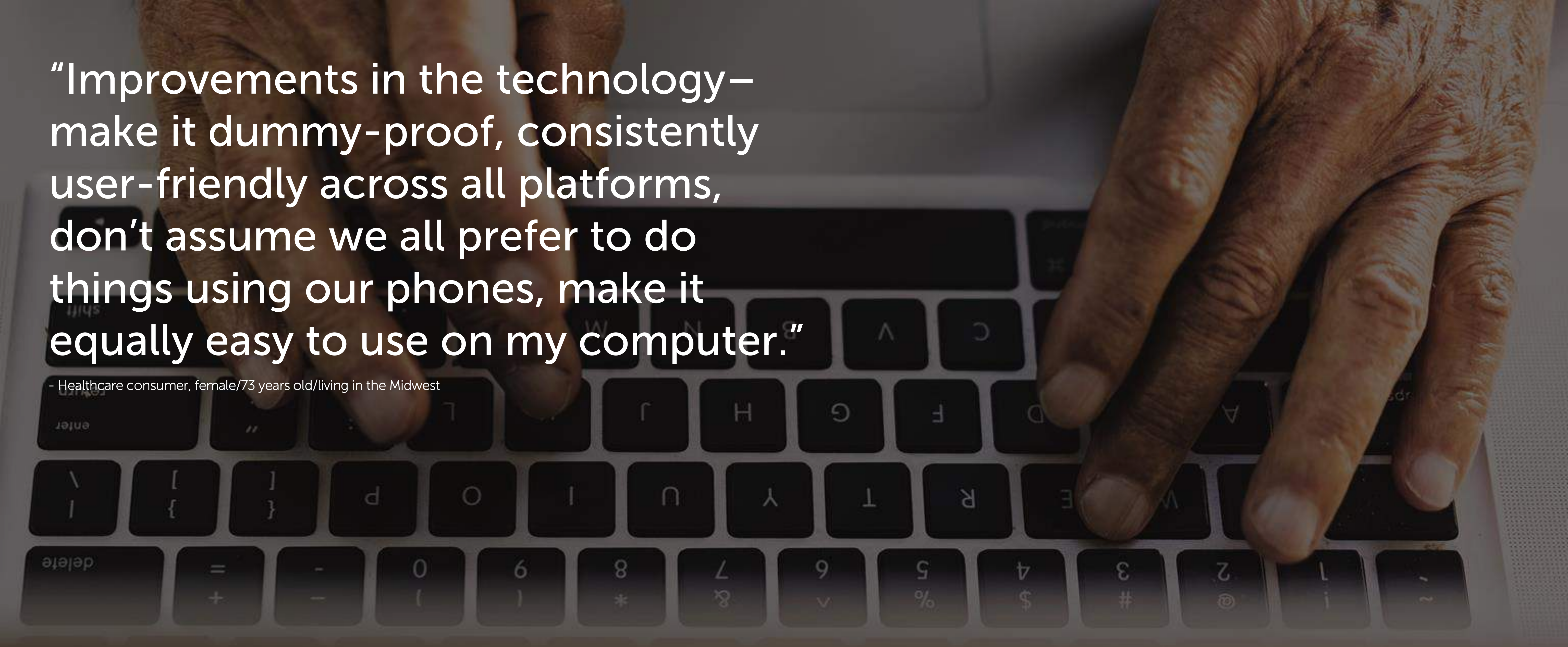
GOAL #2: Intuitive UX

The bar for digital interfaces has been set high, and our services need to be dummy-proof with user-friendly experiences that work just as well on mobile devices as on a computer.

Virtual care opens new doors to equity

Telehealth can be a powerful tool for reaching underserved populations, which face disproportionate time and resource strains. It could also be a path for re-engaging one of the most challenging and time-pressed segments: the Doctor Dodgers.





“Improvements in the technology–make it dummy-proof, consistently user-friendly across all platforms, don’t assume we all prefer to do things using our phones, make it equally easy to use on my computer.”

- Healthcare consumer, female/73 years old/living in the Midwest

“I have not experienced virtual healthcare, but it should be available 24/7. Make it more readily available on all days, not just weekdays.”

- Healthcare consumer, female/75 years old/living in the South

“Availability or wait times should be less than 5 minutes. The session should not be rushed, and exchange of information or symptoms should be detailed.”

- Healthcare consumer, female/33 years old/living in the West

People use Virtual Care today as a “check-in” rather than a “check-up” reflecting the perfect channel for consumers’ Behavioral Health needs

	Service line usage within virtual care	Service line usage across channels
Primary care	63%	75%
Behavioral health* treats mental health and well-being	22%	10%
Specialty care	13%	16%
Digestive health* treats gastrointestinal issues	10%	10%
Pediatrics	7%	7%
Women’s health	7%	24%
Neurology* treats diseases of the brain and spinal cord	6%	8%
Heart care	6%	10%
Orthopedics	4%	11%
Bariatrics/Weight loss	2%	1%
Cancer care	2%	4%
Sports medicine	2%	3%
Surgery	0%	10%

Base All U.S. nationally balanced respondents 2022: All channels (1102) Virtual Care only (331)
B4 In what ways did you receive care for these healthcare services that you used in the last year?
Data Selection frequency

09

Brand framework

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

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

It is based on the latest social science 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.

A note on this year's model

This year, we continued exploring the attributes that are top of mind for consumers

The only change to this year's model was to apply a Weighted Moving Average (WMA) to the composite score. This WMA accounts for both past performance (2020–2021) and 2022 performance and is weighted to assign more value to recency.

This purposeful evolution builds on three years of consistent brand experience measurement, both reducing data variability due to external events at the time of fielding and rewarding brands for consistent consumer relationships over time.

No other changes were made to the model this year, and we maintained our four areas of focus and the structural equation model (SEM) approach. Just like last year, brand scores are weighted by market using the health engagement index, which measures how central health and wellness is to consumers' lives.

SENSORIAL DRIVERS

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

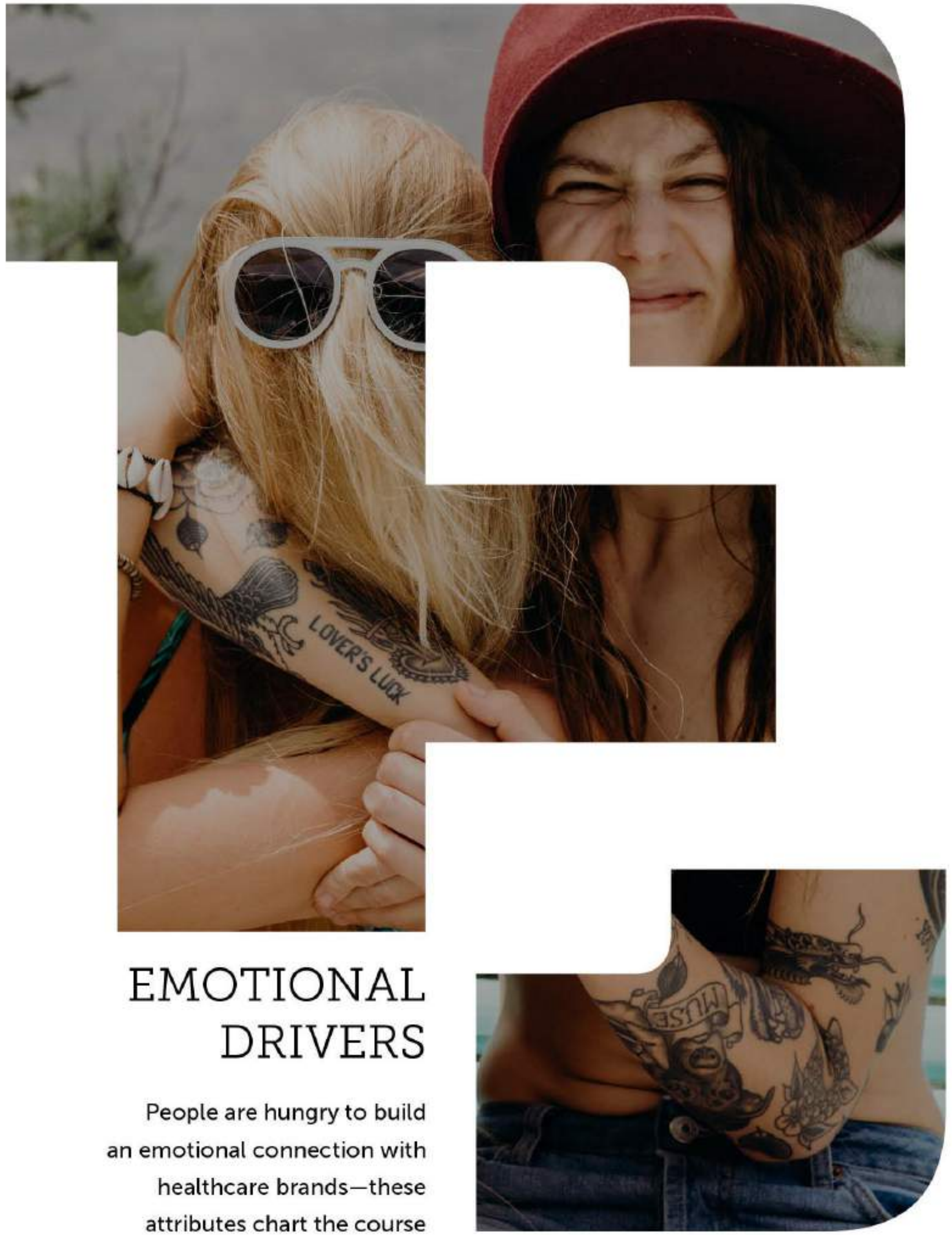
IMPORTANCE	2022 DERIVED IMPORTANCE RANK	2021 DERIVED IMPORTANCE RANK	2020 DERIVED IMPORTANCE RANK
BUZZ People I am close to say positive things about them	1	1	1
ENVIRONMENT Has environments and physical spaces that appeal to me	2	2	2
HERD BEHAVIOR I see others I am close to using their services	3	3	4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

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

IMPORTANCE

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



EMOTIONAL DRIVERS

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

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

BEHAVIORAL DRIVERS

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

IMPORTANCE

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

* Statement added in 2022

10 Brand rankings

Section:

BRAND RANKINGS

2022 Brand Rankings

The published Humanizing Brand Experience brand rankings are based entirely on consumer opinion and driven by the composite score from the Humanizing Brand Experience model, weighted by healthcare engagement in each market. Scoring is consistent with previous years (2020-2021), with the addition of a weighted moving average (WMA) now applied to reward brands that perform consistently well over time.

Rank	Brand
1	Cleveland Clinic
2	The Ohio State University Wexner Medical Center
3	The Christ Hospital
4	UC Davis Health
5	Nebraska Medicine
6	Johns Hopkins Medicine*
7	University of Michigan Health*
8	Valley Health System
9	UAB Medicine
10	Baptist Health South Florida

Rank	Brand
11	Massachusetts General Hospital
12	UT Southwestern Medical Center
13	University of Miami Health System
14	Kadlec
15	Mayo Clinic*
16	UNC Health
17	OhioHealth
18	Bronson Healthcare
19	Memorial Healthcare System
20	Spectrum Health
21	Brigham & Women's Hospital
22	The University of Kansas Health System
23	IU Health
24	Beaumont Health
25	Froedtert & Medical College of Wisconsin*
26	Bellin Health
27	Northwestern Medicine
28	West Hills Hospital and Medical Center
29	UVA Health
30	UChicago Medicine
31	Duke Health*
32	UCSF Medical Center
33	Intermountain Healthcare
34	Ochsner Health System
35	UCLA Health*

Rank	Brand
36	Asante
37	Atlantic Health System
38	UC San Diego Health
39	UT Health San Antonio
40	TriHealth
41	Texas Health Resources
42	Dartmouth-Hitchcock Health
43	UC Health
44	Houston Methodist
45	St. Luke's Health System
46	Main Line Health
47	Virtua Health
48	National Jewish Health
49	University of Utah Health
50	Yale New Haven Health
51	Catholic Health
52	Emory Healthcare
53	Edward-Elmhurst Health
54	Beth Israel Lahey Health
55	Stanford Health Care
56	Memorial Hermann
57	University Hospitals
58	Penn Medicine
59	BJC HealthCare
60	Tampa General Hospital

Rank	Brand
61	Mercy
62	Rush University System for Health
63	Saint Luke's Health System
64	UCHealth
65	Allegheny Health Network
66	Henry Ford Health System
67	Atrium Health
68	NewYork-Presbyterian
69	St. Luke's Hospital
70	ChristianaCare*
71	BayCare
72	Hoag Memorial Health
73	Inova
74	AdventHealth*
75	Torrance Memorial Medical Center
76	LCMC Health
77	Northside Hospital Atlanta
78	UPMC
79	St. Elizabeth Healthcare
80	OHSU Healthcare
81	NorthShore University HealthSystem
82	Baylor Scott & White Health*
83	University of Maryland Medical System
84	NYU Langone Health
85	Community Health Network

Rank	Brand
86	UCI Health
87	Saltzer Health
88	UW Medicine
89	MemorialCare*
90	Sharp HealthCare
91	McLeod Health
92	Carilion Clinic
93	MaineHealth
94	Jefferson Health
95	North Kansas City Hospital
96	Mount Sinai Health System
97	Cedars-Sinai
98	St. David's HealthCare
99	Centura Health
100	Trinity Health Mid-Atlantic
101	Northwell Health
102	Tidelands Health
103	Mercy Medical Center
104	Hartford HealthCare
105	Methodist Healthcare
106	Methodist Health System
107	Orlando Health
108	St. Peter's Health Partners
109	Swedish
110	Scripps Health

Rank	Brand
111	Grandview Medical Center
112	Beacon Health
113	Saint Joseph Health System
114	Banner Health
115	HonorHealth
116	Aurora Healthcare*
117	Tidal Health
118	HealthCare Partners*
119	HealthPartners
120	SSM Health
121	Keck Medicine of USC*
122	Piedmont Healthcare
123	Medical City Healthcare
124	Sunrise Health
125	Dignity Health*
126	Tufts Medical Center
127	Advocate Health Care*
128	George Washington University Hospital
129	HealthONE
130	University of Michigan Health-West
131	Novant Health
132	HCA Houston Healthcare
133	Providence*
134	MedStar Health*
135	Concord Hospital

Rank	Brand
136	SwedishAmerican
137	Legacy Health
138	SCL Health
139	MultiCare
140	Wellstar
141	Franciscan Health
142	OSF HealthCare
143	Beebe Healthcare
144	Broward Health
145	Sparrow
146	LifeBridge Health
147	Trinity Health of New England
148	Loyola Medicine
149	AMITA Health
150	Presbyterian Healthcare Services*
151	WakeMed Health
152	OptumCare*
153	Goshen Health
154	M Health Fairview
155	Saint Joseph Mercy Health System
156	The Valley Health System
157	Carle Foundation Hospital
158	Baptist Health System
159	Munson Healthcare
160	Tulane Medical Center

Rank	Brand
161	Mercy Health Cincinnati
162	South Bend Clinic
163	Hackensack Meridian Health
164	Ascension Borgess Hospital*
165	Allina Health
166	UnityPoint Health
167	RWJBarnabas Health
168	Sutter Health*
169	Sturgis Hospital
170	Grand Strand Health
171	University Health System
172	Nuvance Health
173	Virginia Mason Franciscan Health
174	Conway Medical Center
175	CHI Health*
176	Detroit Medical Center
177	Saint Alphonsus Health System
178	Lake Health
179	PeaceHealth
180	University Medical Center
181	MaineGeneral Health
182	UNM Health System
183	Central Maine Healthcare
184	Adventist Health
185	Atlantic General Hospital

Rank	Brand
186	Grady Health System
187	Mercy Health Grand Rapids
188	Northern Light Health
189	Kaiser Permanente*
190	McLaren Health Care
191	The MetroHealth System
192	Mount Carmel Health
193	Brookwood Baptist Health
194	Denver Health
195	Steward Healthcare
196	Sentara Healthcare
197	Lovelace Health System
198	HCA Midwest Health
199	West Valley Medical Center (HCA)
200	CHRISTUS St. Vincent Health System
201	Truman Medical Centers/University Health

Let’s take a look at some of the biggest movers in the rankings and the top disruptors

Top 10 biggest movers 2021 to 2022

Brand	2022 National Rank	2021 National Rank	2021-2022 Rank Change
Asante	36	142	106
Atlantic Health System	37	125	88
West Hills Hospital and Medical Center	28	112	84
Valley Health System	8	82	74
Banner Health	114	174	60
Centura Health	99	157	58
Saint Luke's Health System	63	115	52
Henry Ford Health System	66	110	44
University Hospitals	57	100	43
Northside Hospital Atlanta	77	119	42

7 Disruptor Brands in 2022 with scores higher than Cleveland Clinic

Brand
Parsley Health
Kindbody
Heal
Forward
Maven
One Medical
Oak Street Health

11

Implications and key takeaways

2022 Healthcare Playbook

Strategies for brand, culture, and experience in the new world

Healthcare has changed for good; are your brand, culture, and experience built to adapt? Read on for our top takeaways and recommendations for putting this year's data to work at your organization. From optimizing digital experiences to embracing human diversity–if you're on a mission to humanize your brand, here's where to start.

1

Fight for humanity in the new battleground

Despite all the pressures and changes our industry has faced in the past couple years, it's our shared responsibility to keep pushing for humanizing experiences at all costs. As a brand leader, it's your duty to be the voice of humanity in the board room, tirelessly fighting to advocate for the humans that your system employs and cares for.

What to work on:

- **Track it:** To know how to improve it, you've got to track it. Ask about the humanness of your brand experiences in your exit surveys. Add it to whatever way you track patient satisfaction. Ask your leaders to make it a part of their rounds and be sure to provide a place where they can share feedback with you.
- **Consider culture:** Your people are everything. Revisit your culture planning, training, and scripting: does empathy always come before efficiency (or is it at least right in line with it)? Don't be afraid to spend time working with and retraining your people. They need your support now more than ever.
- **Be a relentless advocate:** Be that person. The one who always demands a human perspective. The one who asks about the consumer's needs during every executive and team meeting. Being a brand and experience leader means being the voice of the people, always.

2

To win in the whole-person health era, prioritize offerings and access

You have unprecedented consumer permission to renew your focus on diverse, wellness-oriented offerings and new access points. While you can't be everything to all people, you can enable more self-care and wellness management among your consumers and patients by embracing new touchpoints.

What to work on:

- **Revisit your brand's strategy:** How does your positioning accommodate the new reality of consumer health and wellness behaviors? The answer is your filter for moving forward and choosing which offerings to expand and prioritize. Don't hesitate to enhance your brand's core language to better connect with these expanded consumer expectations.
- **Draw the map:** To truly understand what your consumers are going through, you have to map more than their care experience. Take a broader, more holistic view of how people engage with overall health, care, and wellness. Get into their lives (via research, of course!) to put these ideas into context. Identify the gaps and opportunities where your brand can support them.
- **Speed up your research:** We live in a faster-paced world than ever before, and it's time to get comfortable with quick tests and rapid research results. Establish a panel for quick consumer, patient, and employee feedback. It doesn't need to take three months—you can get usable data to enable decision-making in three days.

3

Gear up to go virtual

If you were one of the healthcare brands that put together a virtual offering with "duct tape and elbow grease" at the onset of the pandemic* it's time to make things official. We get it, the virtual world is less comfortable and less familiar. It's also filled with high consumer expectations (thanks, Netflix) and ripe with opportunity. That's exactly why you need to prioritize it to understand, craft, and refine your experiences.

What to work on:

- **Know the landscape:** Map the entire consumer experience, including the intersection of physical and virtual care modalities. If you don't understand the ins and outs of how people move through your physical and digital spaces, you are already behind.
- **Tailor your expression:** How does your brand express itself visually and verbally in the digital landscape? Design and tone of voice can enhance the experience and help you stand out, and it should be carefully crafted to sing in a virtual space. Putting as much emphasis on information architecture as you do on messaging refinement represents the new balance that's needed.
- **Seize digital opportunities:** Start treating your virtual experiences like a digital marketing testing ground. For nearly zero cost, you can trial messaging, communications hierarchy, and visual or verbal cues dynamically. Test concepts, track behavior, and solicit feedback; the virtual experience is a vast, untapped testing ground.

4

Embrace human diversity and nuance

If you don't have a unique segmentation model that you use to understand the people you serve, that's a huge gap that's limiting the way you engage and connect with them. How can you become more human in your brand experiences if you don't really understand the humans you want to serve? It's essential to explore and document the rich diversity and nuance that define the consumers that make up your market. To do so requires a repeatable segmentation model that flexes by service line, life stage, and health engagement.

What to work on:

- **No excuses:** If you don't have a budget to prioritize segmentation, start with ours. Please—take it and go use it. It will make an immediate impact, we promise.
- **Punch the numbers:** Conduct the quantitative research that will inform a custom segmentation model for your market. Explore the ways people are similar and the ways they are different. Identify the nuances in how they want to engage, what messaging resonates, and even which channels will have the most influence and impact. Know where they want to go and what they need from your experiences. Then you have the insights to empower your actions.
- **Capitalize on EMRs:** Craft a typing tool that is tied to your electronic health records. Add segment-specific questions into your standard patient engagement process and use it to tag individuals. This can provide incredible richness, balancing consumer-based behavior data with actual usage experiences. The analysis opportunities are endless.

5

Changemaker:
It's time to own the role

You (and everyone you work with) got into this industry because you wanted to help people. However, healthcare is increasingly failing to help everyone equally. That's why our final takeaway is a call to action for our industry: we need to be a leader for inclusivity. We can help influence our experiences, our offerings, and our industry to be more equitable and accessible for all. It's time to lead the way.

What to work on:

- **Own the narrative:** As brand and experience leaders, we need to drive the dialogue internally and ensure inclusivity is top of mind. Team up with your organization's DEI&B leaders to express what your brand is working toward. Make sure this story gets told. Share the stage and amplify the impact of your collective efforts.
- **Put on the pressure:** You have more influence than you think. Put pressure on payors, vendors, and service providers to be more inclusive. Here's an easy one: go tell your electronic health record provider that there needs to be more than two gender options available for your patients. Making change happen starts with the little things.
- **Revisit your purpose:** For years, healthcare brands have focused branding efforts on standing out in the health world. But what if your purpose were more about *changing* the health world? The last few years have pushed us to ask bigger, bolder questions as an industry and society. How will you and your brand answer the call?

Want to join the Movement?

Subscribe to Humanizing Brand Experience and gain access to data for your brand and market, while also receiving annual report learnings prior to its distribution to the rest of the country. Still hungry for more humanizing insights? Become a part of our Humanizing Brands Collective, a growing group of leaders from brands across the country who meet quarterly to share best practices, field new research, and challenge what it means to deliver healthcare brand experiences in today's quickly changing world. For more information get in touch with us here: **monigle.com/hbe-membership**

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SHSMD Society for Health Care Strategy & Market Development™

AHA Data & Insights

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METHODOLOGY

THE HUMANS

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

THE METHOD

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

THE NUMBERS

n = 28,831 total respondents

n = 3,183 respondents who are nationally representative of the U.S. in terms of gender, age and region

n = 25,648 respondents who are from all 59 markets where brands were evaluated

THE FIELDWORK

Wave 5 (2022) November – December 2021

Wave 4 (2021) November – December 2020

Wave 3 (2020) November – December 2019

THE SCIENCE

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

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 Healthcare Strategy & Market Development

The Society for Healthcare Strategy & Market Development (SHSMD) of the American Hospital Association is the largest and most prominent voice for healthcare 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 healthcare 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 healthcare organizations, our clinician partners—including more than 270,000 affiliated physicians, 2 million nurses and other caregivers—and the 43,000 healthcare leaders who belong to our professional membership groups. Founded in 1898, the AHA provides insight and education for healthcare leaders and is a source of information on healthcare issues and trends. For more information, visit the AHA website at www.aha.org.