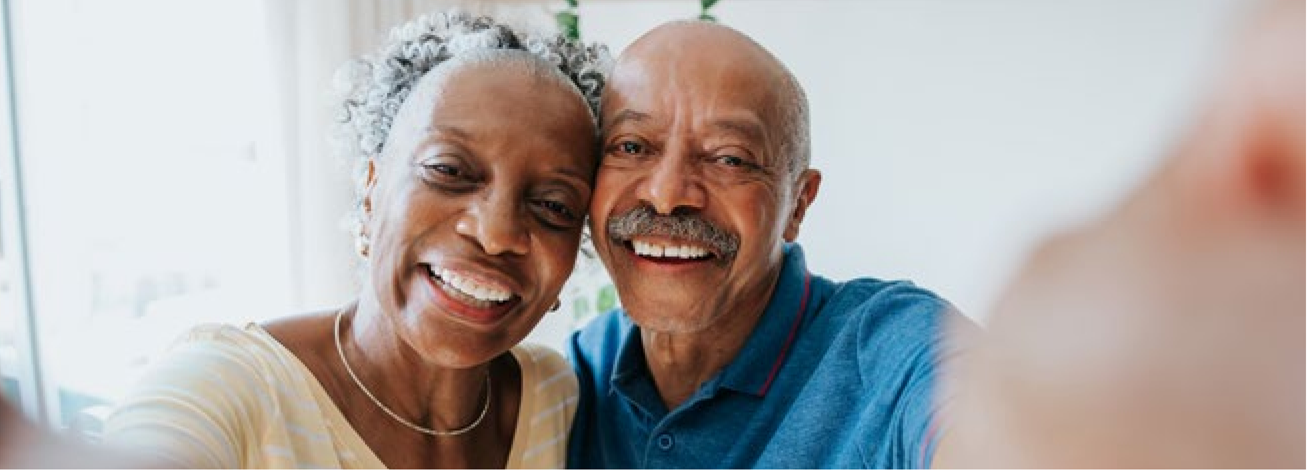
VOL. 5 HEALTHCARE EDITION

Humanizing Brand Experience

monigle

SHSMD Society for Health Care Strategy & Market Development™



Welcome back, readers.

It's been another tumultuous year for our industry, as the direct impacts and ripple effects of COVID-19 continue to change the way consumers engage with life, health, care, and wellness.

Though it can be easy to pin all the disruption on the pandemic and yearn for the day when it's finally "over" and we can all get back to normal, this year's data suggests otherwise. In reality, the battleground that healthcare brands operate within has fundamentally shifted, and there's no going back to how it worked before.

Now, healthcare brands must adapt and change to fit into new societal, cultural, and personal needs. No longer as a set of brick-and-mortar facilities, but as a boundless, interconnected, and hybrid network. No longer as the gatekeepers of health treatments and information, but as a partner in people's self-directed approaches. No longer as a provider of medication alone, but as a source of holistic, nontraditional approaches to health. No longer as a source of care for some, but as an inclusive provider for all.

This year's report will explore all these shifts and more, as we recalibrate and reorient ourselves to serve a growing force of savvy, discerning consumers jarred by the last couple of years, but eager for new approaches to health, care, and wellness.

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

Your Monigle Team

Quick Navigation: Click on page number to jump to section

CONTENTS

Go to Table of Contents

Chapter

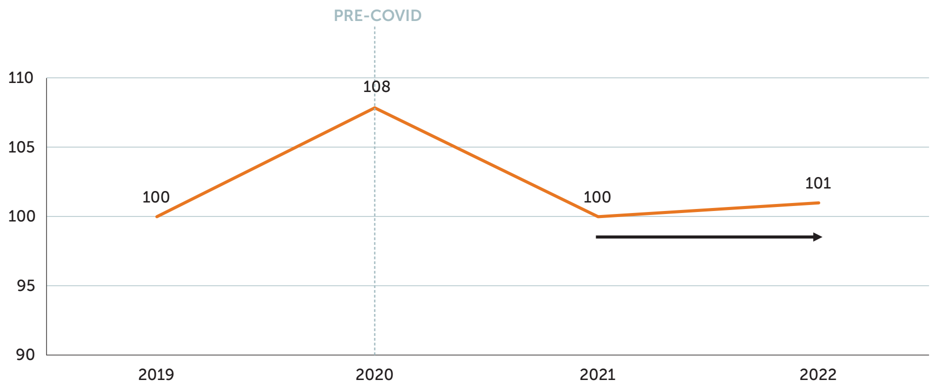
01

Category engagement has gotten more complex

From masking regulations to mental health opinions, it seems like everybody is trying to be a health brand these days. However, consumers aren't making it easy for anyone.

Engagement in healthcare is stable but has yet to return to pre-pandemic levels. That means consumers still aren't receiving the same emotional reward from care as they were back in 2019; neither are they displaying the same appetite for "innovative" approaches.

2019–2022 HEALTHCARE ENGAGEMENT INDEX



The home health and fitness explosion

While healthcare and wellness services suffered, home health and fitness products boomed. Peloton's story is almost universally known, but it doesn't make the numbers any less staggering. At the height of the pandemic, their stock increased by over 440%. And they weren't alone; brands like Mirror, NordicTrack, Bala, and CLMBR all saw unprecedented sales growth. According to the NPD group, from 2019 to 2020 sales of fitness equipment in the United States increased by 84%, to reach $3.7 billion.

As the pandemic drags on, many are seeking space from all the noise about healthcare—an urge we can surely all relate to. Instead, there is a hunger for distraction and an orientation toward health and wellness categories like fitness and nutrition. Think self-care, not healthcare.

Data from the United States Department of Commerce* shows that while consumer spending on healthcare services sharply fell (-8.1%) during the pandemic peak, it was summarily replaced by recreational goods (+18%) and household equipment/furnishings (+5.7%).

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

*2020 growth in components of real personal consumption expenditures (PCE)

The battle for peace of mind

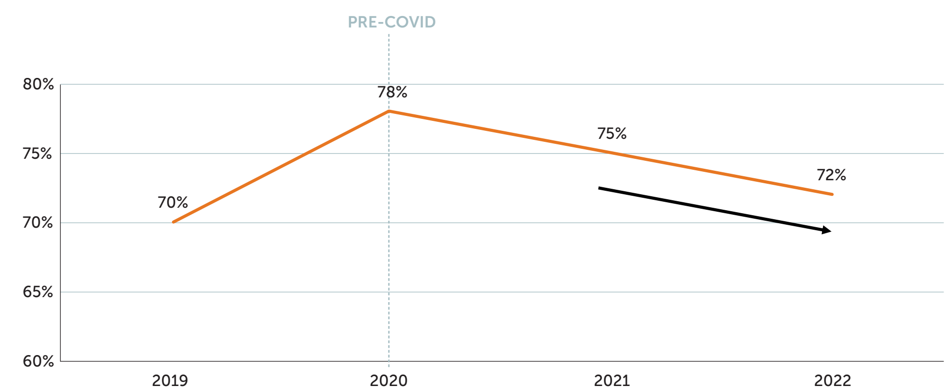
As healthcare brand leaders, we all shoulder some responsibility for the continued lull in category engagement. Though we've worked hard to continue delivering great care experiences in this rapidly changing landscape, we haven't been as effective at delivering what consumers crave: **peace of mind.**

As consumers finally return for care they've delayed over the past two-plus years, they are finding it **less emotionally satisfying** than pre-pandemic experiences. Though they may show up for that appointment or procedure, it isn't delivering the peace of mind they've been craving.

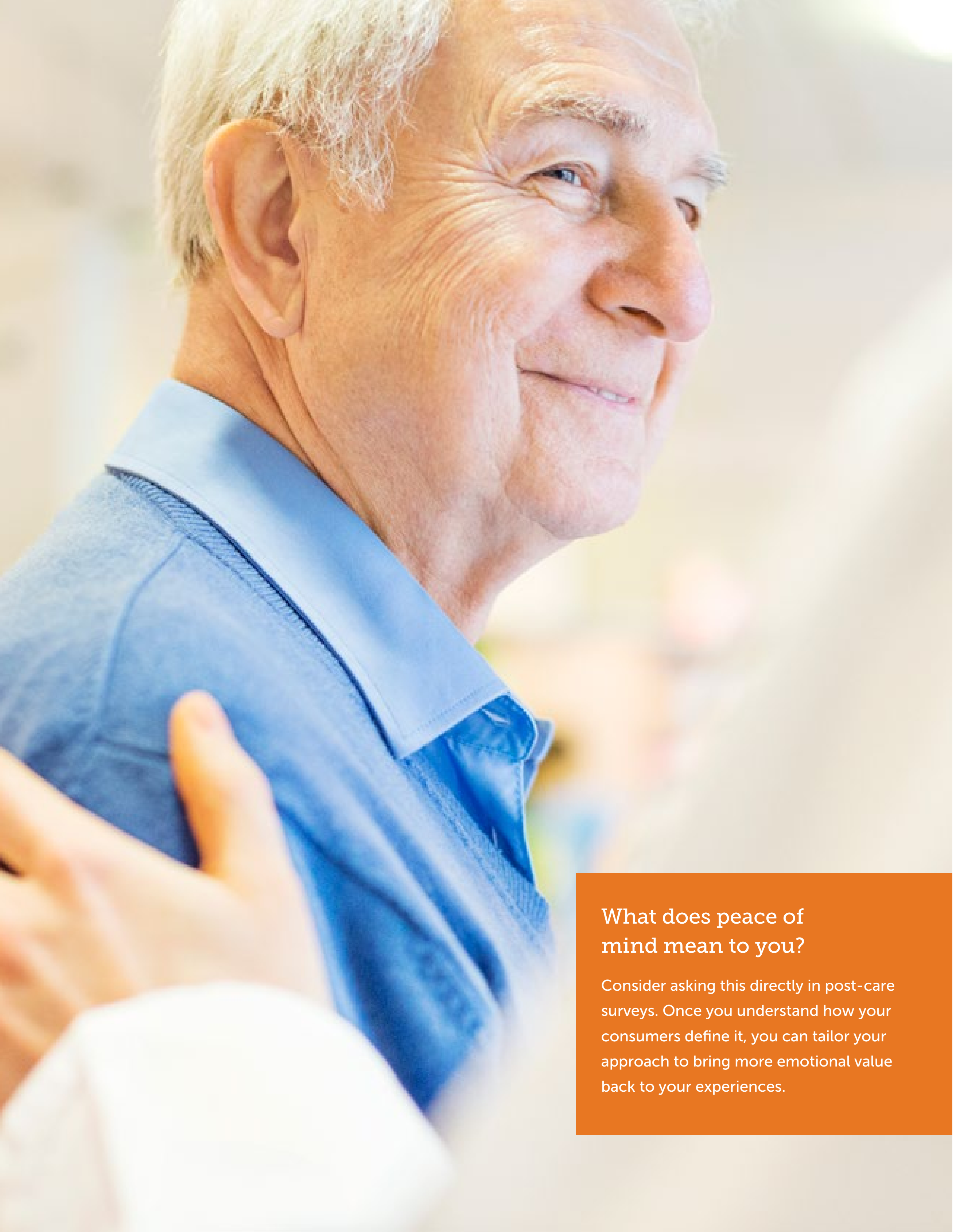
There are many reasons this is the case: Understaffed locations. Burnt-out providers. New tech and procedures that feel less and less human. This is the new brand battleground: engaging consumers has become more complicated as we try to keep doors open, our people safe (and sane), and our care experiences meaningful.

2019–2022 HEALTHCARE ENGAGEMENT—EMOTIONAL VALUE

I feel peace of mind after receiving healthcare services or treatment



Top 2 box score: % of U.S. healthcare consumers strongly or somewhat agreeing with the statement "I feel peace of mind after receiving healthcare services or treatments"

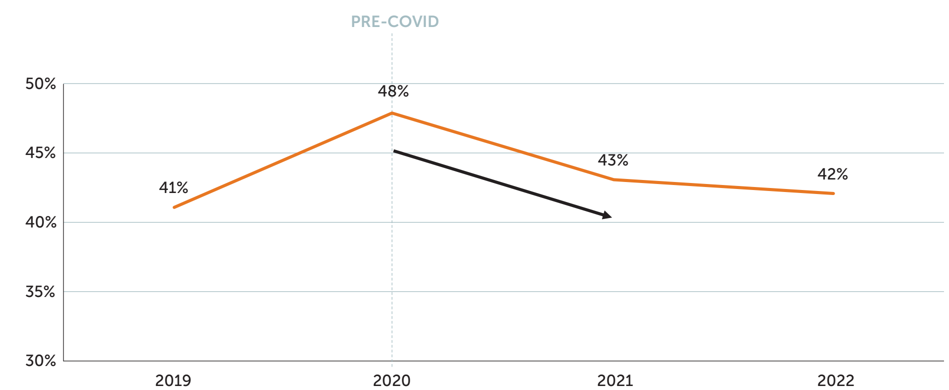


During a time when just getting the basics seemed fraught and potentially dangerous, consumer appetite for innovative healthcare has stalled. According to our measure of Innovativeness, an element of our Category Engagement battery, consumers returning to the world of health, care, and wellness are less oriented toward the latest and greatest in care.

With so much continued volatility surrounding life these days, it appears a collective hesitancy has formed, and even traditionally early healthcare adopters are taking things more slowly.

2019–2022 HEALTHCARE ENGAGEMENT–INNOVATION

I tend to try new approaches to taking care of my health and wellness before other people I know



What does peace of mind mean to you?

Consider asking this directly in post-care surveys. Once you understand how your consumers define it, you can tailor your approach to bring more emotional value back to your experiences.

Top 2 box score: % of U.S. healthcare consumers strongly or somewhat agreeing with the statement "I tend to try new approaches to taking care of my health and wellness before other people I know"

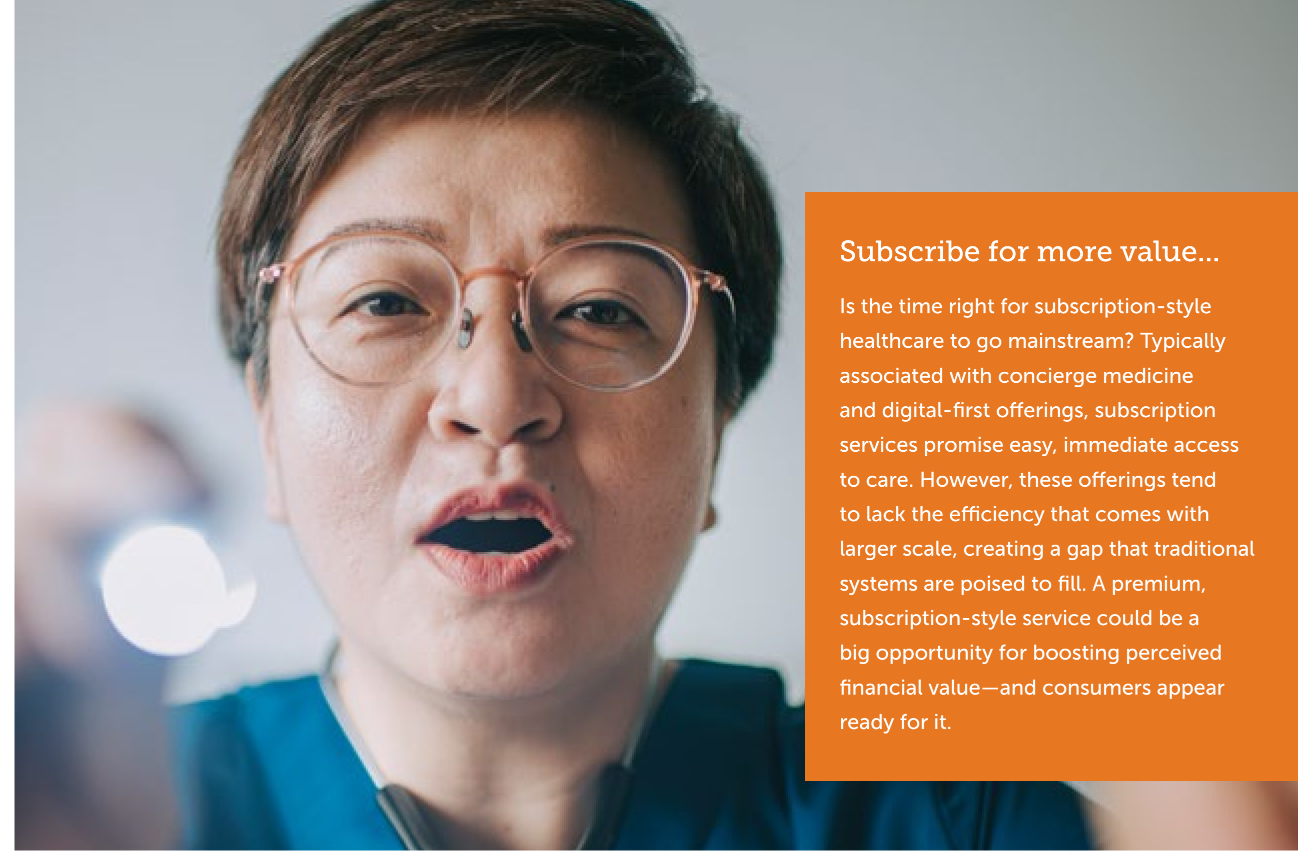
Here's the good news

When we look at year-over-year trends, the perceived financial value of healthcare and topical interest is recovering.

The re-emergence of perceived financial value is critical as the economics of care continue to shift and brands continue to explore different ways to build back business performance. Going forward, your brand will have to define what kind of financial value to create. Is it about direct price transparency on key services? Or is it about other areas of value creation like time-savers and efficiency?

As prices for everyday goods and services continue to rise, money is on everybody's mind. Like other categories, healthcare faces a concerning increase in cost. If brands don't strategize early, addressing rising cost perceptions will quickly become a major challenge. As of February 2022, the U.S. Bureau of Labor Statistics reported a 7.9% increase in the Consumer Price Index over the last 12 months–the highest inflation rate in the U.S. since January 1982.

Fortunately, the increased role of financial value demonstrates that improving business performance doesn't have to conflict with consumer needs. Instead, brands must take the time to explore how their experiences can deliver this benefit in a meaningful way.



Subscribe for more value...

Is the time right for subscription-style healthcare to go mainstream? Typically associated with concierge medicine and digital-first offerings, subscription services promise easy, immediate access to care. However, these offerings tend to lack the efficiency that comes with larger scale, creating a gap that traditional systems are poised to fill. A premium, subscription-style service could be a big opportunity for boosting perceived financial value—and consumers appear ready for it.

2021–2022 HEALTHCARE ENGAGEMENT—ALL MEASURES

Measure	2022	2021	YOY CHANGE
EMOTIONAL VALUE I feel peace of mind after receiving healthcare 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 healthcare services unless I'm really sick or injured	51%	55%	-4
***PERSONAL GOALS** I set healthcare goals for myself and track my progress toward 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 healthcare 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 healthcare	33%	33%	0

Top 2 box score: % of U.S. healthcare consumers strongly or somewhat agreeing with the each of the above statements.
**New statements for 2022*

Some markets are faring better than others

Although national healthcare engagement levels remain stagnant, signs of recovery are visible in key metropolitan areas. Miami, New Jersey, Los Angeles, and Orlando are leading the way in consumer health engagement. If nothing else, this data shows that health attitudes and behaviors *do* differ by market—so if you want to truly humanize your brand experiences, it will require a market-specific understanding of your unique consumer engagement, behaviors, and needs mix.

	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

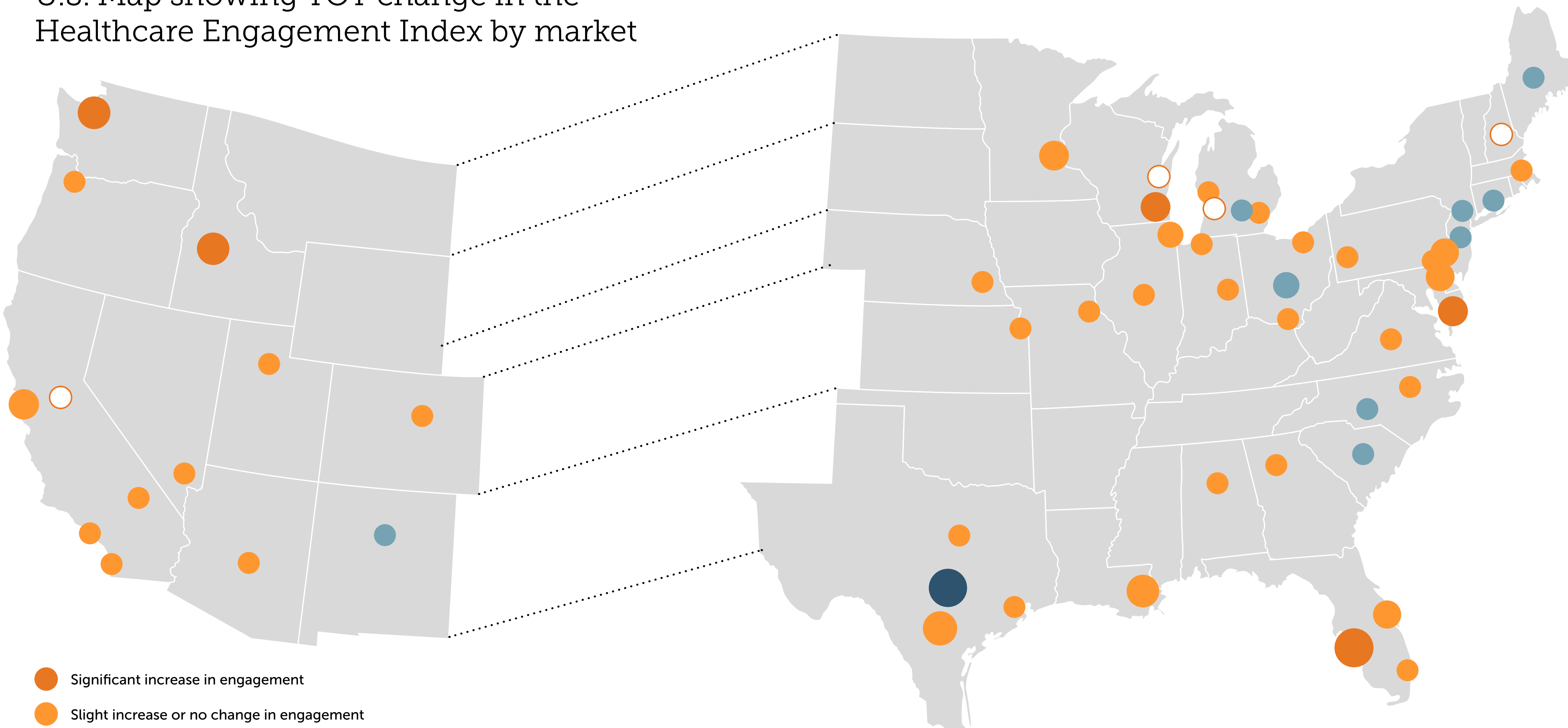
	2022 Index	2021 Index	YOY Change
Tampa	113	99	+14
San Antonio	113	105	+8
San Diego	113	108	+5
Birmingham	113	111	+2
Baltimore	112	106	+4
Raleigh-Durham	111	104	+7
New Haven	111	106	+5
Illinois	110	109	+1
Delmarva Peninsula	110	97	+13
Seattle/Washington	109	97	+12
Boston	109	102	+7
South Carolina	109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

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.

U.S. Map showing YOY change in the Healthcare Engagement Index by market



- Significant increase in engagement
- Slight increase or no change in engagement
- Slight decrease in engagement
- Significant decrease in engagement
- New markets for 2022

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.

Go to Table of Contents

Chapter

02

Local matters less and less

These days, we may wake up to the nudge of our smart watch, brush our teeth with a device connected to a health app, sneak a quick look at our Gmail inbox, and fire up the latest workout class from a digital library—all before we've even had breakfast. Each of these actions is part of a bigger network of interconnected portfolios, services, and offerings: aka, a system.

Systems are everywhere today, and their role in our life only seems to be growing. But can the same be said for health systems?

Over the last few years, we've closely monitored consumer preferences for care and services from health systems versus independent facilities. As with the rest of their lives, consumers prefer systems when it comes to their healthcare. However, the latest data shows a subtle shift. While consumers still prefer to receive most of their care services from systems, the pandemic may have contributed to a slight recovery for independent facilities.

2020–2022 SERVICE PREFERENCE FOR HEALTH SYSTEMS (VS INDEPENDENTS)

	2020	2021	2022	CHANGE 2020-2022
Hospital	71%	61%	62%	-9
Surgical services	70%	61%	62%	-8
*Cardiovascular or heart care	NA	59%	61%	NA
*Cancer care	NA	55%	59%	NA
High-complexity care	64%	54%	57%	-7
Specialty care physician	64%	54%	55%	-9
Emergency care	62%	53%	54%	-8
Primary care/Family physician	63%	54%	52%	-11
*Neuroscience	NA	49%	52%	NA
*Orthopedics	NA	47%	49%	NA
Urgent care	54%	44%	43%	-11
Virtual care or telemedicine visit	41%	40%	39%	-2
Pediatrics or teenager care	43%	35%	37%	-6
*Pharmacy	NA	32%	30%	NA

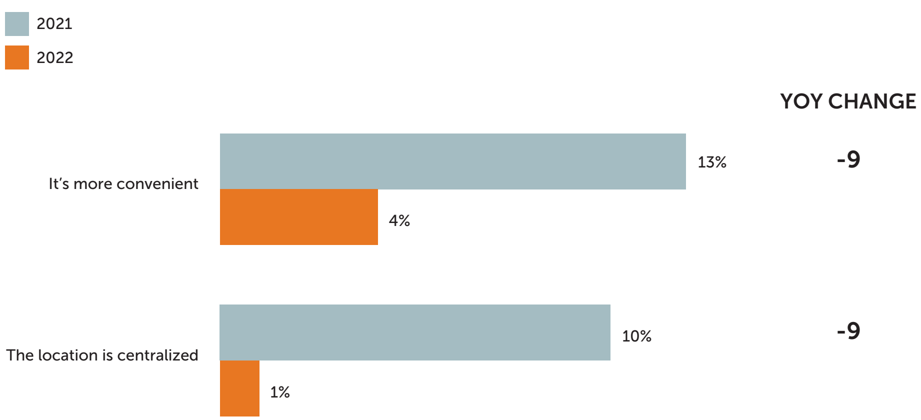
Top 2 box score: % of U.S. healthcare consumers who claim they will be more or much more likely to use a healthcare system** over an independent for the each of the services above.
*New service lines included from 2021
**A healthcare system is a network of hospitals, physician groups, clinics, and specialty centers that all share common ownership and administration.

Why are consumers going solo?

Rising preference for independent facilities may be due to our altered patterns of movement. More consumers are working from home, traveling less, and engaging with smaller bubbles. As our physical world has shrunk, access to our digital one has expanded, with more and more providers offering telehealth. Simultaneously, the importance of physical proximity as a benefit has decreased, with fewer consumers citing centralized location and convenience as reasons to choose a health system over independent options.

We've always known that "bigger" was never enough to drive choice. Now, the pandemic has further challenged the benefits of size and scale. It's never been more important to explore, understand, and communicate the new ways that health systems can create value beyond footprint alone.

2021–2022 UNAIDED REASONS FOR CHOOSING A HEALTH SYSTEM OVER AN INDEPENDENT



Coded open-ended responses to the question: What are the benefits of using a healthcare system* instead of an independent facility?
*A healthcare system is a network of hospitals, physician groups, clinics, and specialty centers that all share common ownership and administration.

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 will communicate more effectively (9%):**
   Clear, empathetic communication is essential for great experiences.

The people factor

With unparalleled labor instability, having the right people has never been more important. Unfortunately, it's also never been so challenging to recruit and retain them.

Year after year, consumers report that having the best people remains the number-one functional driver of decision-making, *and* it's the biggest predictor of HCAHPS performance among all attributes within our study. If you focus on only getting one thing right, you'd be wise to make your people your priority.

How to attract (and hold onto) the best people:

1. **Live your values:** It's one thing to have values and quite another to have values that actually matter to the people you're hiring. Strong values are clear, specific, and action-oriented. Make sure you can back them up with reasons to believe.

2. **Bake in humanity:** People want purpose, and the best employees want to feel a meaningful connection with the work they do. That means humanity must be baked into every level of your brand. When did you last read your brand positioning out loud? Does it sound human?

3. **Give HR a voice:** Retaining the best people requires connected and coordinated efforts across your enterprise. If they don't already, it's time for your Employee Experience and HR folks to have a leading a seat at the table. Define culture goals and build employee campaigns as a unified team.

HBE ATTRIBUTES WITH A CORRELATION WITH HCAHPS OF 0.5+

	HCAHPS Hospital Performance-Correlation
Best People Has the best people	.59
Innovation Offers the latest medical treatments and technologies	.55
Quality Outcomes Provides the best medical outcomes for patients	.55
Self-Actualization Helps and encourages me to be the healthy person I want to be	.53
Empathy Demonstrates empathy and compassion in every aspect of patient care	.53
Security Gives me reassurance that they will be there for me when I need them	.53
Personalization Provides individualized care specific to a patient's unique needs	.53
Success Helps me live a good quality of life	.52
Individualization Makes me feel like the top priority when I'm getting care	.52
Freedom Makes me feel like I have options when it comes to my healthcare	.52
Confidence in the future Gives me confidence in my long-term health and wellness	.51
Transparency Sets clear expectations with patients about what's happening and what's next	.50
Buzz People I am close to say positive things about them	.50

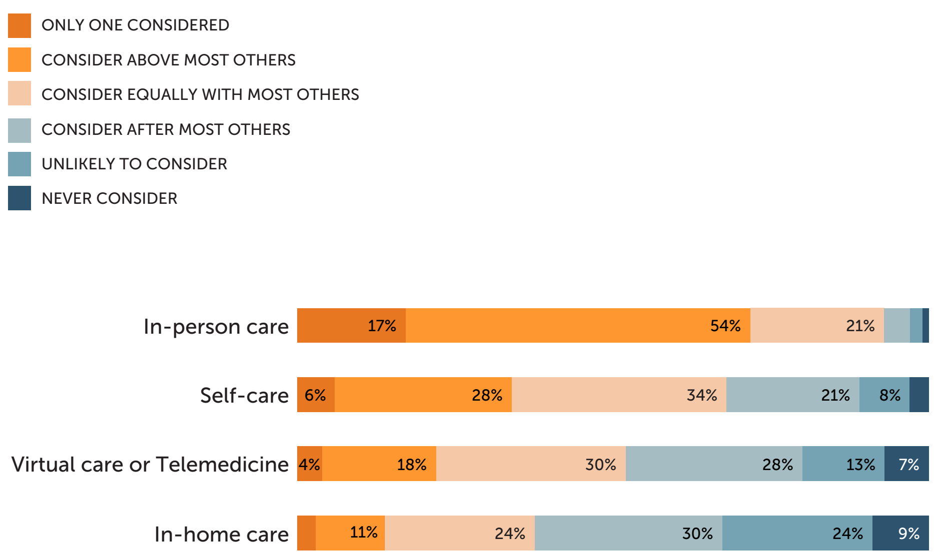
The convenience factor

The second most important Intellectual attribute is Convenience & Ease, aka "makes it quick and easy to get the care patients need." Importantly, this idea is not necessarily connected to location. Instead, it is focused on tradeoffs around time and effort.

With remote work and virtual care continuing to shake up the way people engage with others—including caregivers—the definition of "quick and easy" has fundamentally changed. In-person care is now viewed as a choice, not an expectation. And while it may still be the preferred channel, alternative options are emerging that are knocking down brick-and-mortar care definitions.

The majority of consumers now consider self-care and virtual care as healthcare options on par with in-person care. In addition, one in three would consider in-home care options at least equally with other channels.

2022 HEALTHCARE CONSIDERATION BY CHANNEL



% of U.S. healthcare consumers selecting how likely they would be to consider each channel to manage their health and receive care

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

Redefining an easy experience

It's *more* about:

- ☑ Reducing idle time
- ☑ Eliminating steps
- ☑ Asking simple, straightforward questions
- ☑ Clearly showing me what I can and can't do
- ☑ Giving me choices and options

It's *less* about:

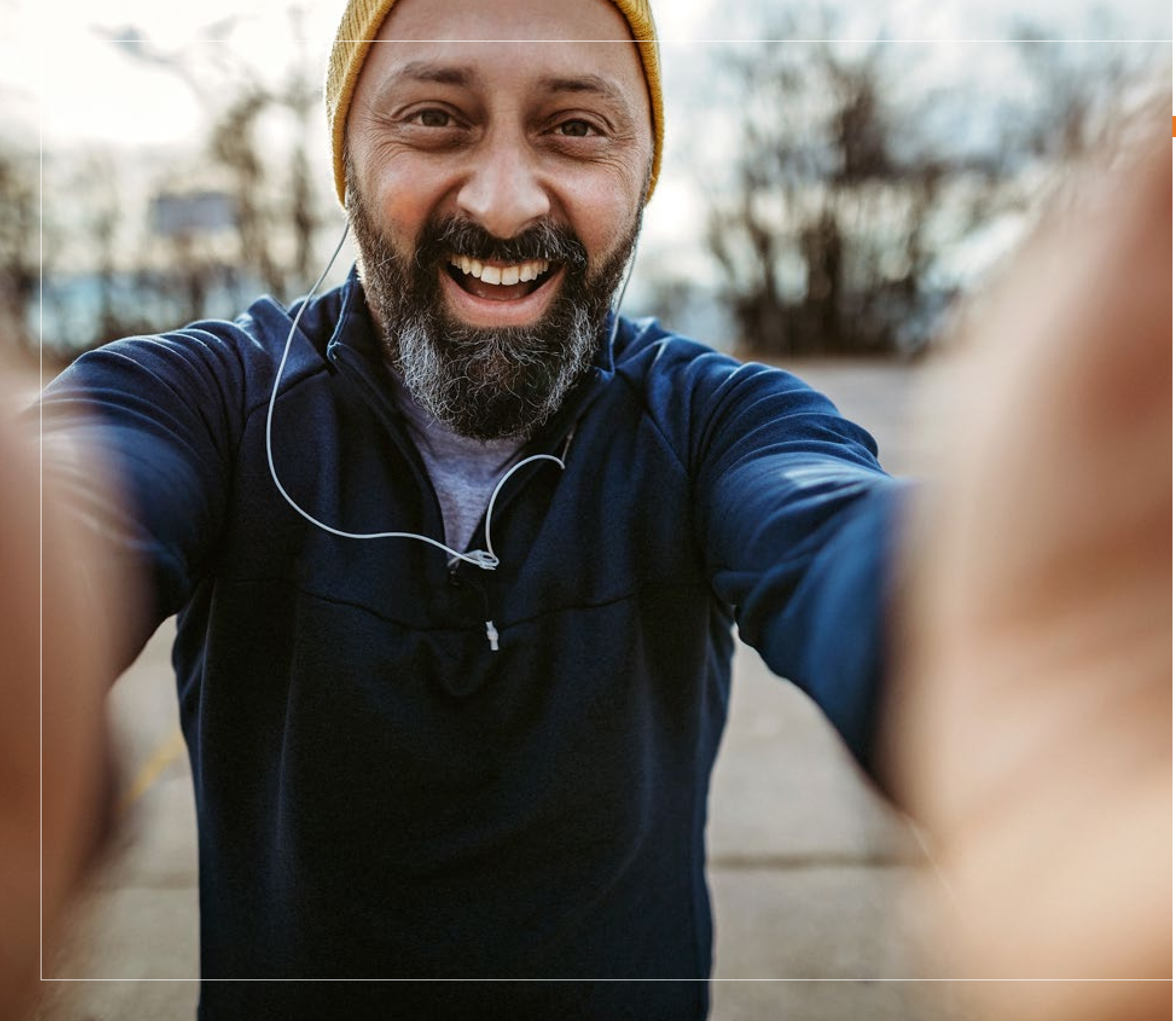
- ☒ More locations closer to me
- ☒ Availability of an online scheduling system (psst: that's now table stakes)
- ☒ Having it be part of the same organization

The future of ease

Disruptor brands like Parsley Health, Heal, Forward, and Kindbody continue to carve out consumer mind space with people-centered, digitally powered approaches to healthcare. And they're continuing to lead the way. For the third year in a row, Parsley Health performs stronger than any other healthcare brand regarding to humanizing brand experience.

How to fight back:

1. Go undercover: Put on your patient hat and "shop" these new experiences for yourself; it just may be the best $1,500 you've ever spent on market research
2. Steal a page from their playbook: Research your consumer markets' awareness and perception of these brands, and build your own experience improvement playbook based on their feedback
3. Take them seriously: If you don't already, it's time to start treating Disruptors like top competitors—they're already putting up just as much (if not more) of a fight than your traditional competition



Go to Table of Contents

Chapter

03

Self-care is empowering new health behaviors

After over two years of living through a pandemic, self-care has taken on a whole new meaning. As people scrambled to cope with changing guidelines, advice, and socio-cultural dynamics, many turned to self-care as a way to take control of their health and wellness.

Consumers define self-care in two ways:

1. **Preventive** care to stay healthy
2. **Reactive** care using online resources to diagnose and treat symptoms on one's own

As self-care takes on a new significance in the way people manage their health, brands will need to adopt a more partnership-oriented role, leaning more heavily into content and programming that supports and keeps consumers safe as they "doctor" themselves.

New segment alert:
Meet the Whole-Health Manager

The Whole-Health Manager is a new but growing segment of the population.

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.

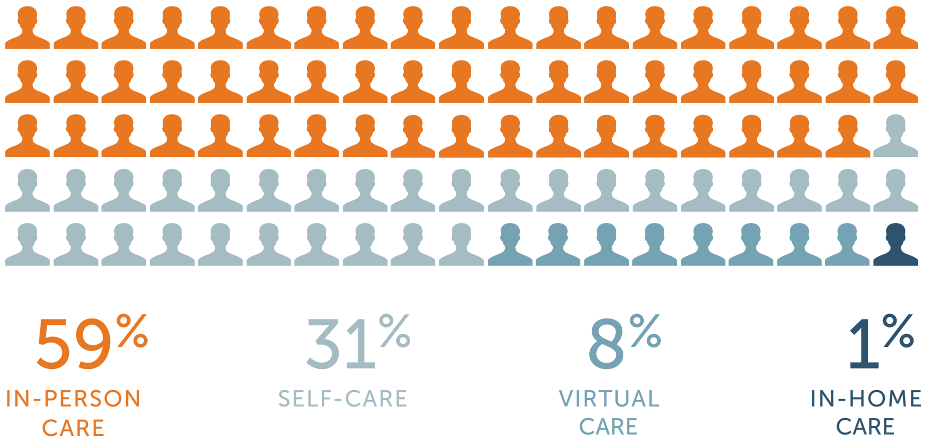
The new first line of defense

Self-care is the top choice for many when it comes to managing their health, with one in three U.S. consumers preferring to try self-care first before seeking in-person care from a provider.

While consumers aren't performing surgery on themselves (yet...), one in five people across the country claims to have been their own primary care physician in the last year. That's 20% of the U.S. population that chose to follow their own care plans—with some help from Dr. Google—instead of leveraging traditional healthcare provider expertise.

The high price tags and access barriers of traditional care, plus an internet's worth of resources at our fingertips, has created a world where consumers are relying on themselves as the first line of defense in health. Traditional organizations have a huge opportunity to re-engage these folks by convincing them to return to the expertise and partnership of trained providers.

2022 HEALTHCARE CHANNEL USAGE—FIRST CHANNEL USED TO MANAGE HEALTH



% of U.S. healthcare consumers selecting which channel they typically use first to manage their health or a health issue.

As healthcare leaders, how can we ensure people aren't getting lost in the self-help shelf?

When it comes to managing behavioral health, more and more consumers are choosing self-care solutions over providers, perhaps due to a combination of destigmatization, provider supply issues, and increasing public recognition of pandemic-driven mental health impacts. However, this trend could mean individuals are not accessing the level of professional mental health support they may need.

Paging Dr. Google

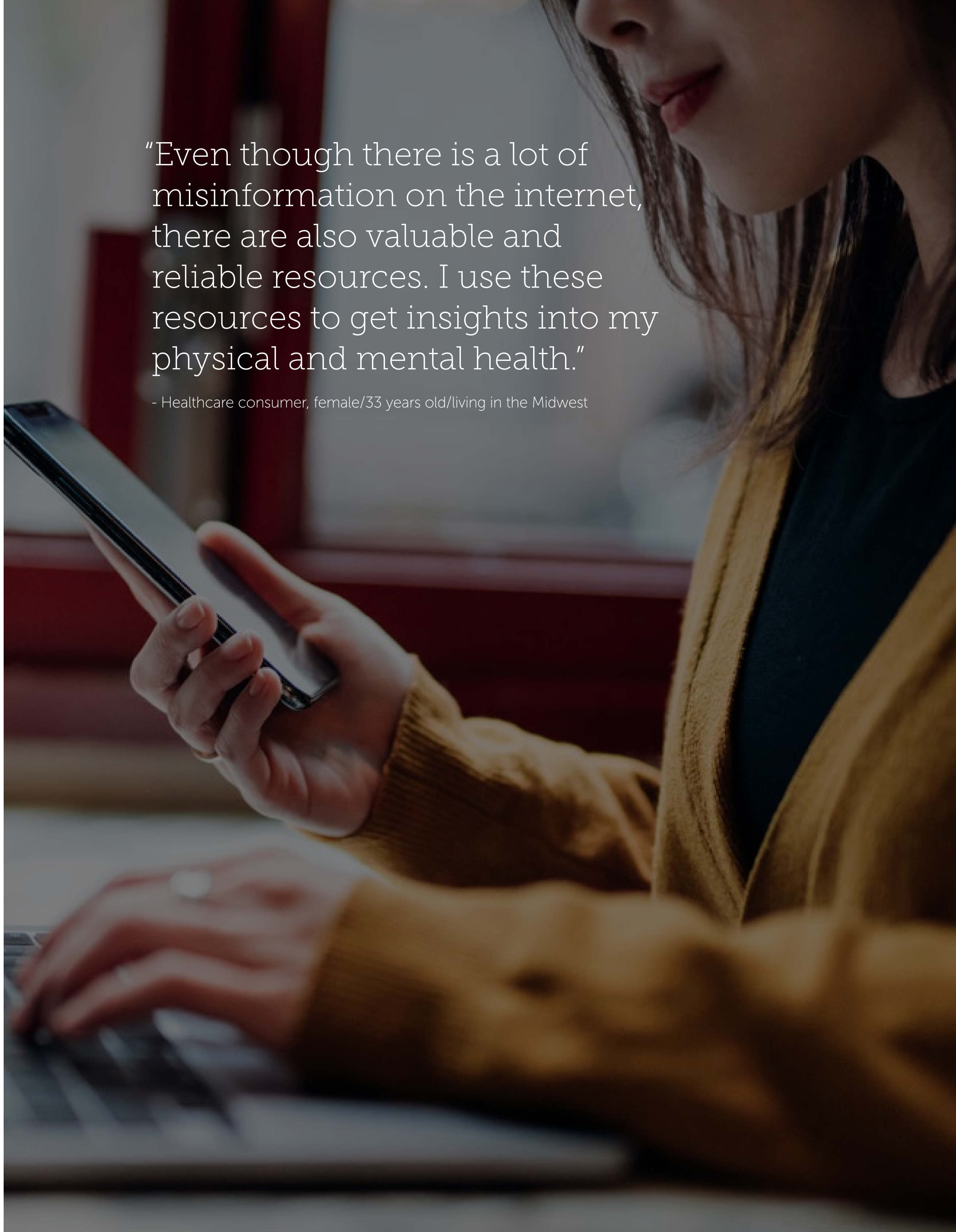
When asked about self-care activities, consumers report many different behaviors and strategies. Unsurprisingly, the most common form of self-care is online symptom research.

41% of consumers researched their symptoms before making an appointment in the last year. From that number, 37% actively self-treated their symptoms, while only 22% sought in-person help from a provider after their research. That means online research provided enough guidance and peace of mind that just under one in four people never even followed up with a professional opinion.

Get in on the content game

One way to support consumers' self-care is through clear, helpful content. Several brands are already leading the way with symptom-focused online libraries. That said, there is an opportunity to tackle content in new, innovative ways.

The role of content is to provide patients with support, create trust, and establish reputation and credibility. Done right, a content studio can build a wealth of brand equity, while generating stronger connections between provider and community. It's also a great way to deliver unique, engaging brand experiences at key moments in the patient journey. With so much to capitalize on, it's time to whip your branded content library into shape.



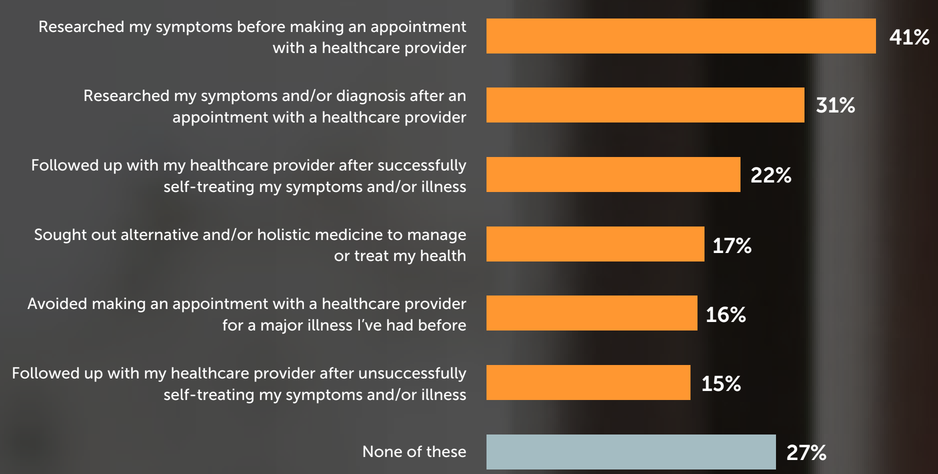
"Even though there is a lot of misinformation on the internet, there are also valuable and reliable resources. I use these resources to get insights into my physical and mental health."

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

Self-care means different things to different people

How does your brand bridge the gap?

2022 SELF-CARE BEHAVIORS



% of U.S. healthcare consumers who claim to have done the above self-care behaviors in the last 12 months

Major hesitancy persists

Over the past year, 16% of people in the U.S. avoided making an appointment with a provider for a major illness they've had before. While self-care is important, it's also essential for consumers to engage with providers to manage serious conditions, and the fact that so many are choosing not to is a major concern.

How different age groups think about self-care

Young and...not in love

As we've seen in past years, trust in healthcare providers is lowest in younger audiences. This lack of trust could be encouraging younger folks to try out more self-care options instead. To win this key audience back, brands will have to focus on rebuilding the relationship.

2022 SELF-CARE BEHAVIORS BY AGE

INDEX ≥ 120

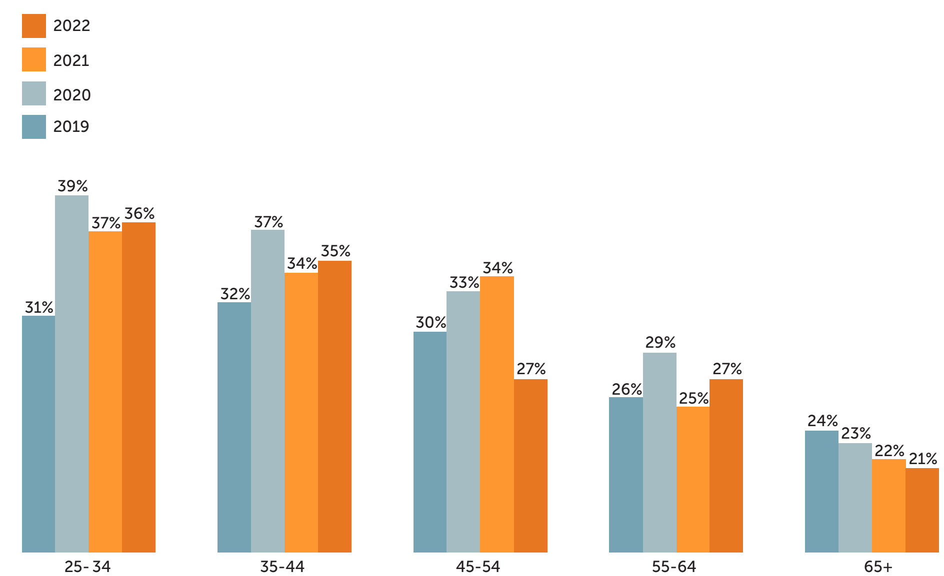
INDEX ≤ 80

	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

Indices of U.S. healthcare consumers by age group that claim to have done the above self-care behaviors in the last 12 months

2019–2022 DISTRUST OF HEALTHCARE PROVIDERS BY AGE GROUP

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



Top 2 box score: % of U.S. healthcare consumers by age group who strongly or somewhat agree with the statement "I don't always trust my healthcare provider to make the right decisions for me"

The primary obstacle

Not every service line is impacted by the propensity for self-care. While acute care and surgery are still doctor-driven, primary care is where most consumers are focusing self-care energies, with behavioral health close behind. Understanding the "why" behind self-care preferences (especially younger people's) offers an opportunity to build a deeper connection and more meaningful experience through primary care and behavioral health channels.

2022 HEALTHCARE CHANNEL USAGE BY SERVICE LINE

	In-person care	Self-care
Bariatrics/Weight loss	1%	1%
Behavioral health	5%	7%
Cancer care	4%	1%
Digestive health	8%	3%
Heart care	9%	2%
Neurology	7%	2%
Orthopedics	10%	1%
Pediatrics	7%	2%
Primary care	68%	19%
Specialty care	15%	4%
Sports medicine	3%	1%
Surgery	10%	0%
Women's health	22%	2%

% of U.S. healthcare consumers who claimed to have used in-person care/self-care for the above healthcare services in the last year

Go to Table of Contents

Chapter

04

The mental health movement is here

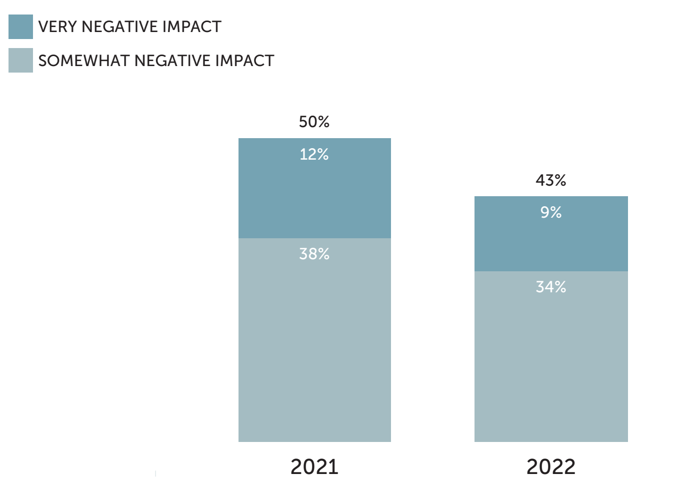
Stand out by standing up for something that the entire population is asking for: a stronger commitment to mental health and behavioral health services.

Mental health has always been challenging for healthcare brands to address. Complex compensation structures, fragmented care-delivery experiences, provider shortages, and the persistent stigma associated with behavioral health have all led to putting this important conversation on the back burner. However, in today's stressful world, consumers are looking to brands to make mental health a priority more than ever before.

Pandemic impact continues

While COVID's impact on mental health has softened since its pandemic peak, two in five people are still struggling with poor mental health. Those are significant numbers; across the U.S., approximately 109 million people are suffering more now than pre-COVID.

2021–2022 COVID-19 IMPACT ON MENTAL HEALTH



Inequality persists

The pandemic's negative impact on mental health has hit some people harder than others. Certain groups, including LGBTQ+, Hispanic, and Asian communities, continue to experience an inequitable share of the mental health burden. These groups, already historically marginalized by a healthcare industry that has struggled with inclusivity, are now further challenged by disproportionate stressors.

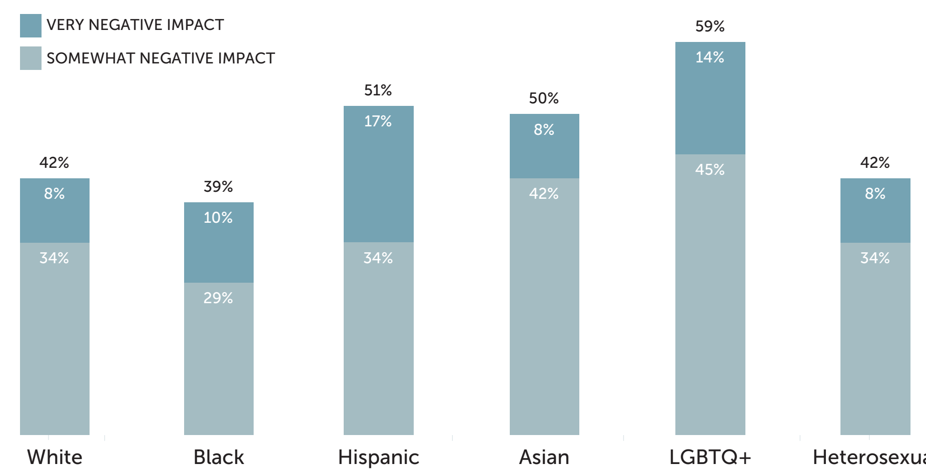
If you are one of the organizations that has recently appointed a Chief Diversity Officer to address inequity issues, it's essential to understand the added challenges these specific populations face. Solving the problem must be multifaceted: not only must workforces be inclusive and representative, but processes must shift at a foundational level to be inclusive of diverse perspectives and experiences.

% of U.S. healthcare consumers who feel that COVID-19 has very negatively or somewhat negatively impacted their mental health

"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 COVID-19 IMPACT ON MENTAL HEALTH BY ETHNICITY AND SEXUAL ORIENTATION



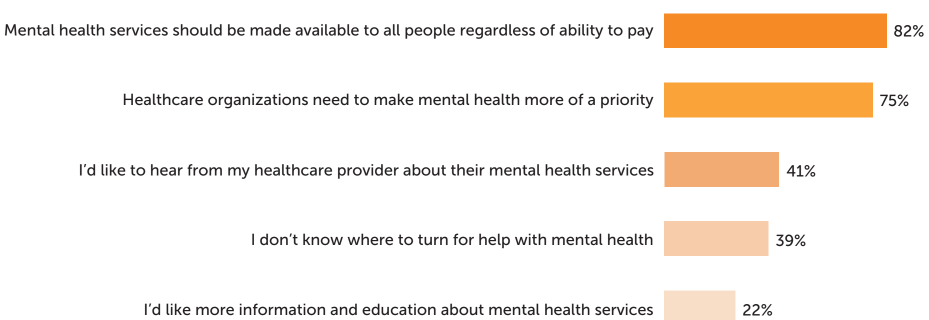
% of U.S. healthcare consumers split by ethnicity and sexual orientation who feel that COVID-19 has very negatively or somewhat negatively impacted their mental health

What role can healthcare brands play?

Mental health is now an essential new battleground that is front of mind for consumers. How will your brand address this pressing need?

Consumers feel that healthcare brands play a pretty major role. Four in five people across the U.S. think mental health services should be made available to all people regardless of ability to pay. And three in four people think healthcare organizations need to make mental health more of a priority for their communities.

2022 MENTAL HEALTH ATTITUDES



Making mental health the main goal

Many systems are working to expand behavioral health capacity, fix access issues, and address social determinants of mental health in their communities. But what if your brand went further? We're looking for a brand with both broad scope and a commitment to putting mental health at the center of their competitive positioning. Is it yours?

> "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

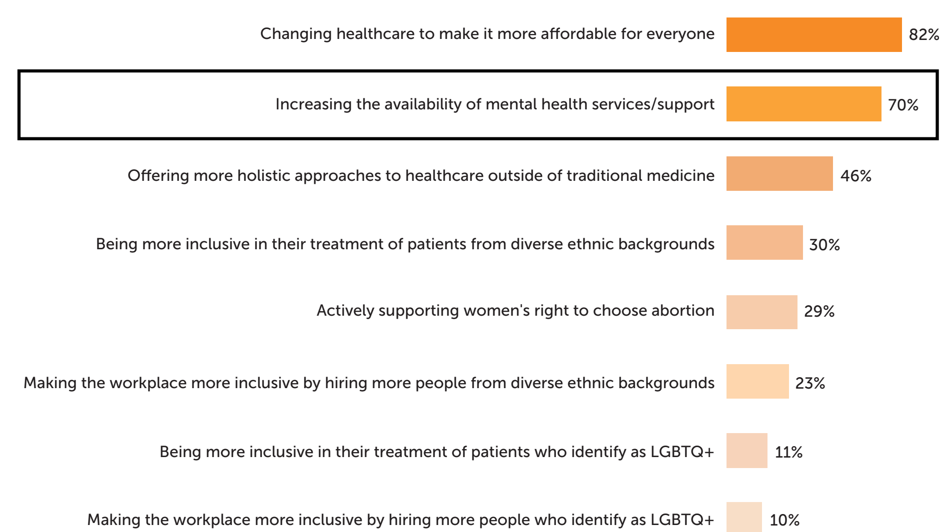
Top 2 box score: % of U.S. healthcare consumers who strongly agree or somewhat agree with each of the statements above

Consumers are calling for more access to mental health services

After making healthcare more affordable, increasing the availability of mental health services/support is the next highest social priority for healthcare organizations (70%), followed by offering more holistic approaches (46%).

This call for access aligns closely with the top Intellectual attribute Convenience & Ease. It is also a push for diversity of offerings, representing the continued expansion of consumer mindsets to include different ways of caring for health and wellness.

2022 SOCIAL AREAS OF FOCUS FOR HEALTHCARE ORGANIZATIONS



% of U.S. healthcare consumers who ranked the above social responsibility areas 1, 2, or 3 (out of 8) for healthcare organizations to focus most on

2022 HOW HEALTHCARE ORGANIZATIONS CAN BETTER SUPPORT MENTAL HEALTH

Make mental health care more affordable/available for everyone	31%
Expand mental health services with more doctors, locations, and counseling options	10%
Raise awareness of the importance of mental health care through outreach	9%
Reduce the social stigma associated with mental health care by treating the whole person	8%
Give staff more/better training on how to handle mental health issues	7%

> "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

Coded open-ended responses to the question: How can healthcare organizations better support people with their mental health?

Go to Table of Contents

Chapter

05

Holistic care has gone mainstream

To succeed in the new world, you're going to have to expand your definition of health and care. In addition to making care affordable for everyone and prioritizing mental health services, consumers are clamoring for healthcare providers to offer more holistic approaches to care, outside of traditional medicine.

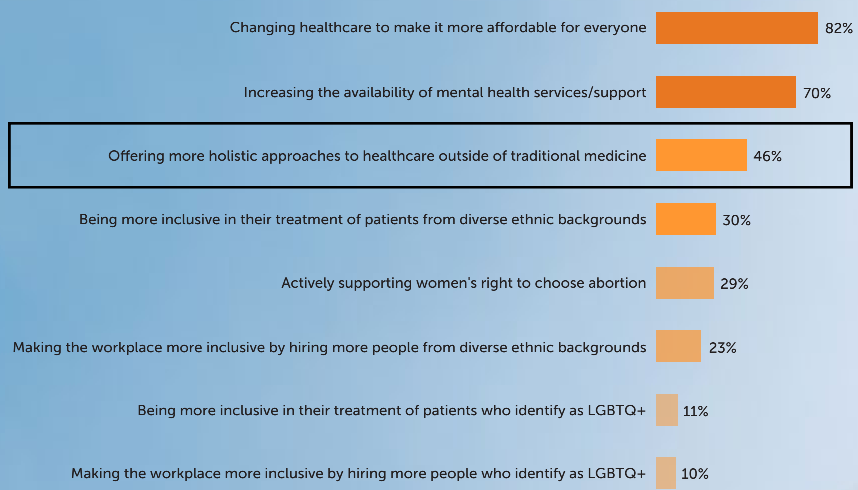
This appetite for different approaches is a big opportunity for healthcare brands. If we're no longer tied to traditional, pharmaceutical-prioritizing paths, we become free to explore new avenues to expand the role we play in people's lives. Permission to think big? Granted.

This could change everything

One in three U.S. consumers now prefers holistic or alternative treatments to managing their health over taking medications or prescribed drugs. That's a significant number of people with new expectations for their healthcare providers.

These changing preferences could be paving the way to a new future for our industry—one that has expanded beyond the traditional confines of medications and drugs. While it's hard to imagine today, if we don't find a way to adjust and meet new demands, these consumers will leave us for brands that are willing to do things differently.

2022 SOCIAL AREAS OF FOCUS FOR HEALTHCARE ORGANIZATIONS



% of U.S. healthcare consumers who ranked the above social responsibility areas 1, 2, or 3 (out of 8) for healthcare organizations to focus most on

"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

It’s not about crystals and star signs

In times past, the idea of holistic healthcare was viewed as a little “out there.” But that’s far from the case for today’s sophisticated consumers. People aren’t looking to healthcare brands to transform into metaphysical spiritual guides—but they are looking for new, practical, real-world alternatives to traditional medicine.

Three in five consumers feel that healthcare organizations can better support their holistic health needs by doing the following five things:

2022 HOLISTIC HEALTH AREAS OF FOCUS FOR HEALTHCARE ORGANIZATIONS

Coded open-ended responses to the question: In your opinion, how could healthcare organizations better support your holistic health needs?

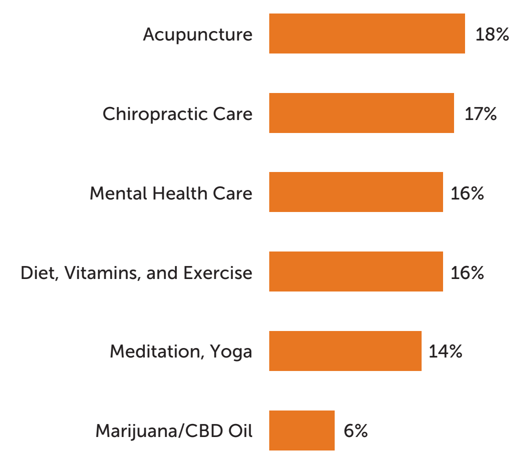
Holistic brand experiences

This shift toward holistic healthcare should be factored into brand experience. Primary care may be an easy opportunity to try to incorporate more holistic offerings and nontraditional approaches. This may look like:

- Providing educational health content and resources from a holistic perspective
- Prescribing holistic approaches and treatment
- Emphasizing preventive steps like diet and exercise

It will be important to consider how holistic alternatives can be offered inclusively and affordably—not only to wealthy, white, non-LGBTQ+ patients.

2022 HOLISTIC HEALTH AREAS OF FOCUS—SERVICES



Looking beyond medication

For consumers, holistic health services include offerings long associated with mind and soul.

Coded open-ended responses to the question: What new services and experiences would you like to see them offer to treat the whole person—mind, body, and spirit—beyond traditional medicine?

Words matter

If you want to explore ways to incorporate holistic health into your brand, experience, and culture, you'll need to figure out how to talk about it.

The right solution isn't immediately clear: while "holistic health" implies natural and nontraditional, it doesn't convey proactivity, comprehensive health management, or alternatives. "Preventive health" boasts positive associations including proactivity but misses the mark on natural, while "integrated medicine" fails to convey wellness or natural.

With the most positive associations, **"whole person health"** may be the way to go, representative of a continued shift to humanized terminology across our industry.

> "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

2022 HOLISTIC HEALTHCARE NOMENCLATURE—VALUE ASSOCIATION

	Holistic Health	Preventive Health	Holistic Medicine	Integrated Medicine	Whole Person Health	Alternative Medicine
Advanced	-4	-2	-7	+16	+3	-6
Basic	-1	+8	+2	-5	-3	0
Caring	+1	+4	-2	-7	+11	-7
Friendly	+3	-1	-2	-3	+5	-2
Helpful	-2	+13	-4	-2	-1	-4
Innovative	-4	-5	-5	+12	0	+1
Modern	-3	-4	-5	+12	+3	-3
Old-Fashioned	+2	-5	+7	-6	-4	+7
Quality	-3	+1	-9	+4	+16	-9
Safe	+5	+6	-3	-5	0	-3
Scientific	-3	+1	-6	+10	+1	-4
Personalized	-2	-1	-6	+1	+14	-7
Trustworthy	0	+1	-7	0	+8	-4
Honest	+1	+1	-3	-3	+7	-4
Natural	+21	-19	+22	-27	-14	+16
Ineffective	+1	-3	+4	-3	-4	+5
Wellness	+2	+13	-5	-15	+15	-10
Relevant to Me	-3	+16	-9	-4	+6	-6
Proactive	-10	+28	-13	-1	+7	-11
Comprehensive	-5	-6	-11	+20	+17	-15
Intelligent	-4	+10	-7	+3	+4	-5

Gap analysis showing holistic healthcare nomenclature value association relative to the average value association score across all nomenclature tested based on selection frequency

Go to Table of Contents

Chapter

06

New consumer segments are emerging

Let's face it: in healthcare, we're all guilty of accidentally defining people as patients—or worse, as their health conditions.

We judge people by their appearance, age, and ethnicity. We make assumptions based on their gender, their weight, or their insurance. We forget that behind every number in our CRM, there's a whole, complicated, unique **human** who wants to be seen and heard.

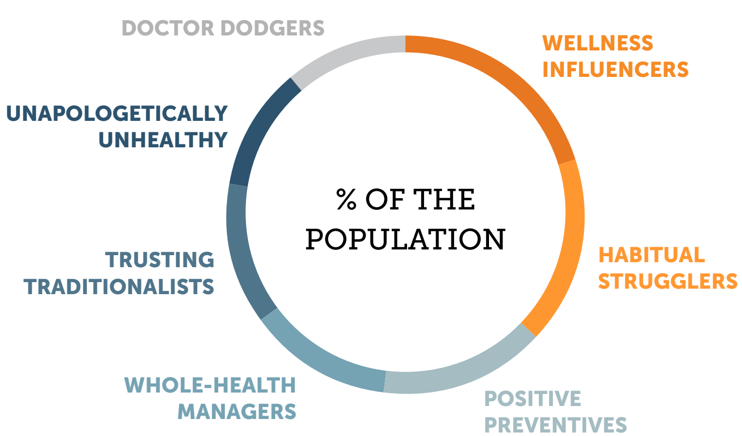
There has to be a better way, right?

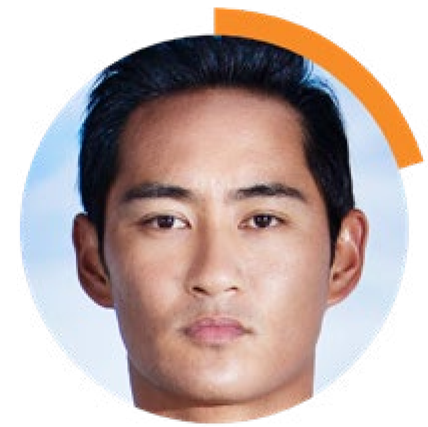
A more nuanced, human way. An approach that helps us deliver personalized service not only at our facilities, but throughout each patient's health journey. That's where our segmentation comes in.

Behaviors > Biometrics
Our segmentation strategy is based on attitudes and behaviors, not biometrics or demographics. We focus on people's relationship with healthcare, so we can better understand how to communicate with them and deliver experiences that resonate with them as individuals.

New consumers on the block
Back in 2019, we developed our first human-centered healthcare segmentation. Now, following one of the most significant health events the world has seen this millennium, we knew it was time take another look. How has COVID-19 changed folks' behavior? Is there a better way to target consumers' ever-changing needs?

Below is a summary of the segments that emerged from our latest research. While some segments will be familiar (shout out to the Wellness Influencers and Habitual Strugglers), there are also some new kinds of consumers to get acquainted with. After all, new consumers = new opportunities for your brand.





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.

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.

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.

UNAPOLOGETICALLY UNHEALTHY

11% OF THE POPULATION

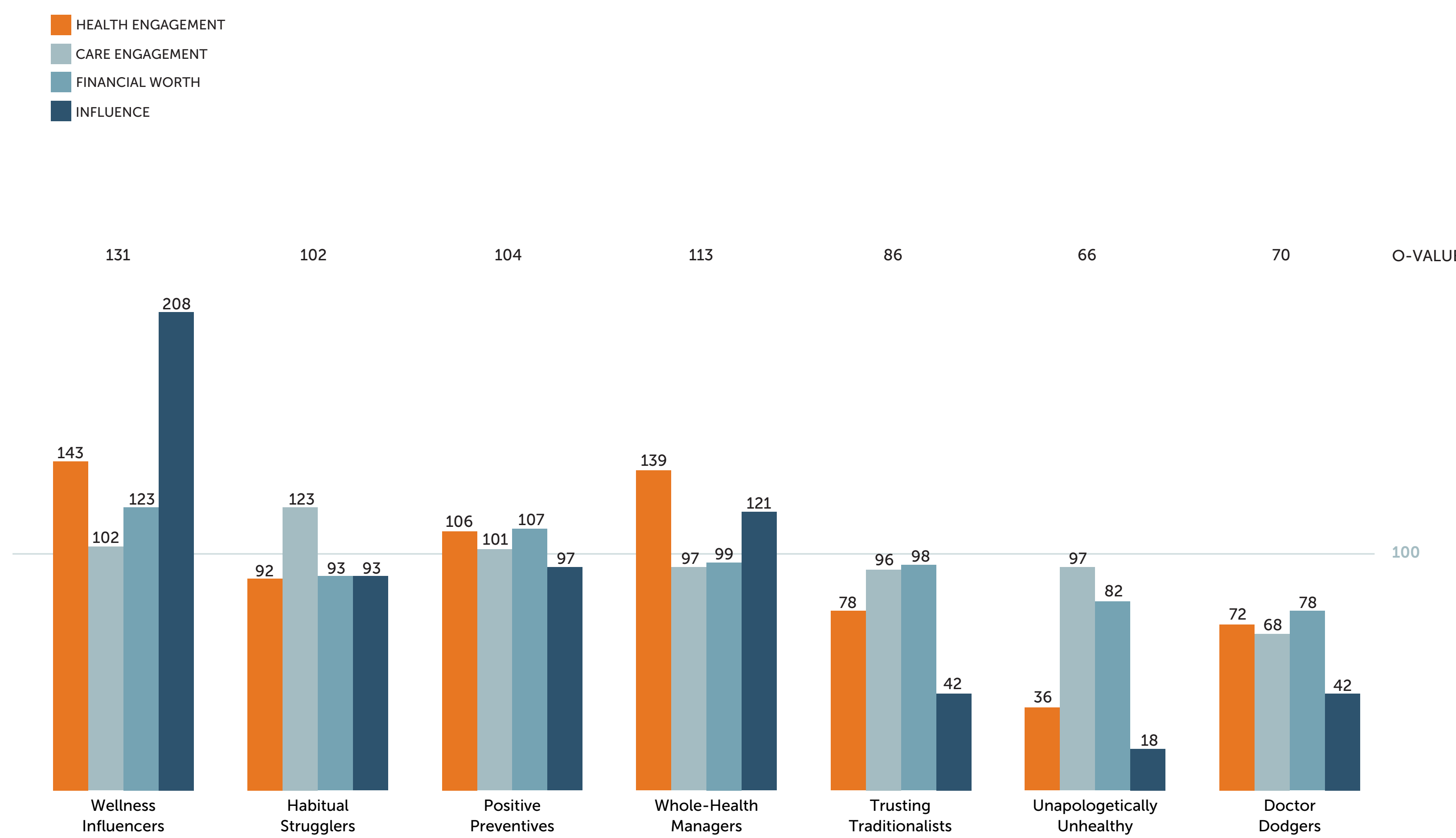
Leaving your health to chance might seem like a questionable strategy in 2022, but that's exactly what the Unapologetically Unhealthy have done their entire lives. And they're still here. Living their best life. Proving us health nerds wrong. These stubborn creatures of habit aren't likely to change 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 us all.

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.

2022 SEGMENT VALUE BASED ON HEALTH AND CARE ENGAGEMENT, WORTH, AND INFLUENCE



Indices based on a composite score sourced from multiple attitudinal and behavioral measures. O-value based on average of indices across health engagement, care engagement, financial worth, and influence scores.

Go to Table of Contents

Chapter

07

Healthcare is not inclusive enough

It's 2022, but unfortunately healthcare disparities still exist for people of color and LGBTQ+ folks. While the pandemic shone a harsh light on inequity in our industry, these systemic issues are far from new.

Healthcare organizations have a responsibility to understand how factors like race and sexual identity contribute to inequity in health and care, so that they can begin to dismantle barriers and better serve people from diverse backgrounds.

Plus, as if moral obligation weren't enough, people of color and those who identify as LGBTQ+ represent essential, influential audiences that are quickly outgrowing the term "minority" in our country. It's time for brands to stop deprioritizing these consumers and start treating them with the representation and respect they deserve.

2022 HEALTHCARE ENGAGEMENT BY ETHNICITY AND SEXUALITY

	White	Black	Hispanic	Asian	Heterosexual	LGBTQ+
My friends and family consider me a "go-to" for advice and recommendations about healthcare	32%	38%	39%	41%	33%	37%
I tend to try new approaches to taking care of my health and wellness before other people I know	40%	54%	47%	48%	41%	42%
I think it is worth the extra cost to go to the best healthcare provider or facility	63%	71%	65%	77%	64%	59%
I feel peace of mind after receiving healthcare services or treatment	72%	80%	72%	74%	73%	63%
I often do my own research on my symptoms and/or treatments	69%	75%	66%	63%	69%	76%
I'm interested in watching or reading about health and wellness-related topics	56%	68%	56%	71%	58%	59%
I tend to avoid getting healthcare services unless I'm really sick or injured	52%	44%	56%	49%	51%	51%
I don't always trust my healthcare provider to make the right decisions for me	28%	26%	32%	32%	28%	37%
I set healthcare goals for myself and track my progress toward them [2022]	48%	62%	54%	59%	50%	49%
I value holistic healthcare that treats the whole person—mind, body and spirit [2022]	48%	60%	53%	56%	49%	55%
Engagement Index	**98**	**114**	**102**	**111**	**100**	**99**

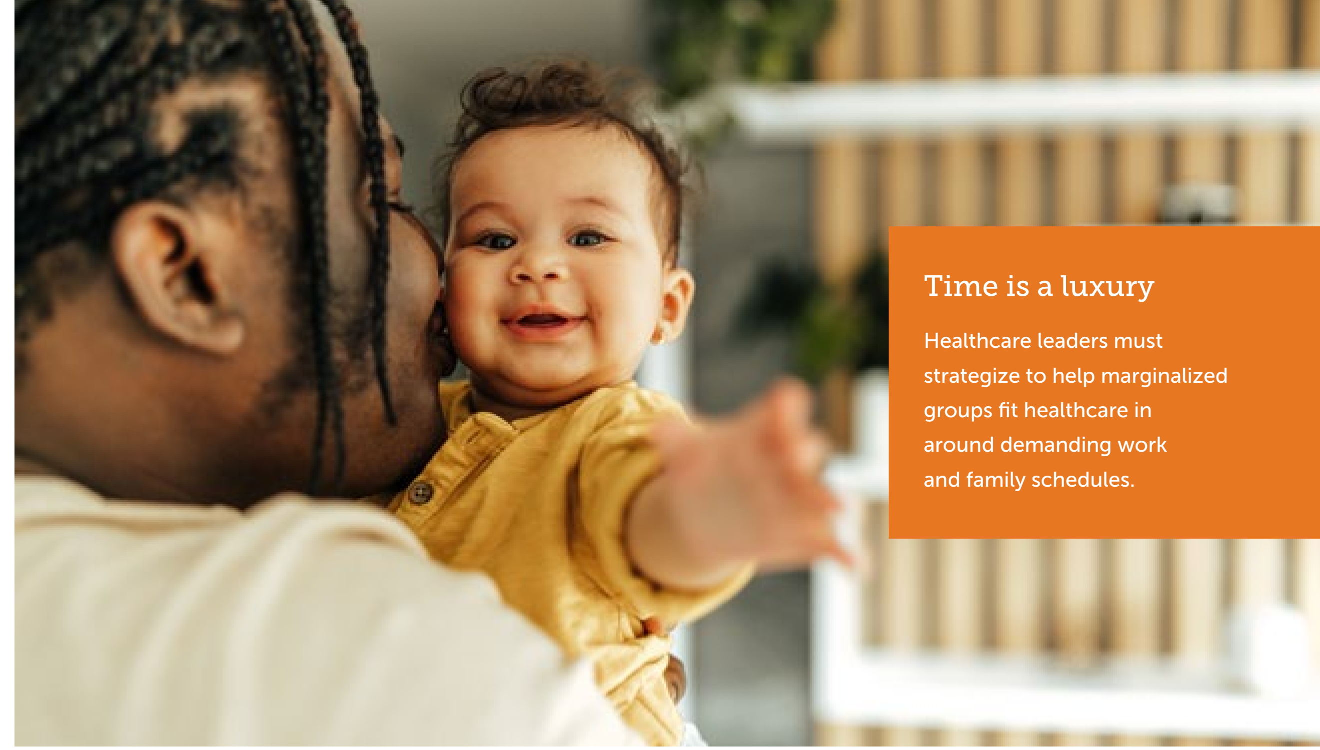
Top 2 box score: % of U.S. healthcare consumers split by ethnicity and sexuality who strongly or somewhat agree with each of the above statements. The Healthcare Engagement Index is a national index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence, and Advocacy.

Care delayed is care denied

Delayed care can be dangerous, preventing early detection and treatment of health issues—and marginalized groups face this threat more than their white, heterosexual counterparts. In particular, when compared to other groups, LGBTQ+ and Hispanic individuals are significantly more likely to have delayed care that they needed in the last 12 months.

Disproportionate care delays could be caused by a variety of reasons. Hispanic consumers face increased challenges of cost and insurance limiting access to care. Asian consumers felt less safe getting care than other groups, potentially due to racial abuse faced throughout the pandemic. LGBTQ+ consumers cited access and safety concerns as reasons for delaying care, along with “other” challenges.

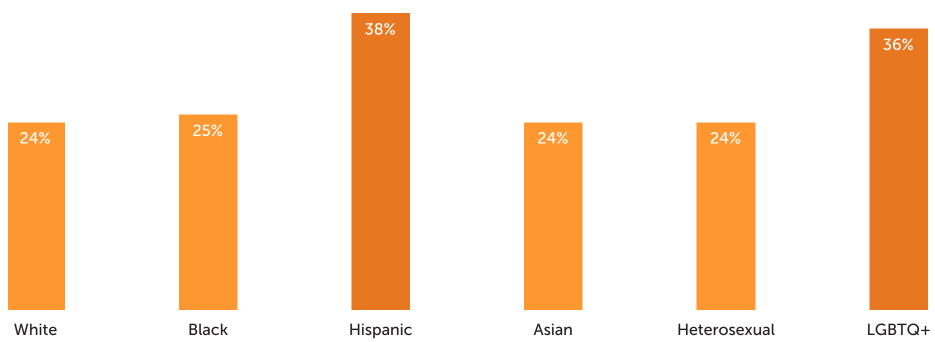
And, across the board, people of color are more likely than white consumers to report **not having enough time** as a reason for delaying care during the past 12 months. This suggests that issues of time and convenience are big barriers that healthcare brands need to address to better serve these consumers.



Time is a luxury

Healthcare leaders must strategize to help marginalized groups fit healthcare in around demanding work and family schedules.

2022 DELAYED CARE IN LAST 12 MONTHS BY ETHNICITY AND SEXUALITY



% of U.S. healthcare consumers split by ethnicity and sexuality who claim to have delayed care that was recommended to them or that they thought they needed in the past 12 months.

2022 DELAYED CARE REASONS BY ETHNICITY AND SEXUALITY

	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%

% of U.S. healthcare consumers who claim to have delayed care in the last 12 months—split by ethnicity and sexuality—who selected the above reasons for delaying care.

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

Coded open-ended responses to the question: As someone who identifies as [LGBTQ+ IDENTITY], how do you think healthcare organizations can better serve you and be more inclusive of the LGBTQ+ community?

"Some places doctors use their belief in Christianity to turn away LGBT people, which needs to stop."

– Healthcare consumer, identifies as male/LGBTQ+/43 years old/living in the West

"By hiring people of that community (as staff and trainers) and by educating non-LGBTQ staff. There also need to be strict guidelines in place for staff who don't treat LGBTQ individuals equally."

– Healthcare consumer, identifies as non-gender conforming/25 years old/living in the Northeast

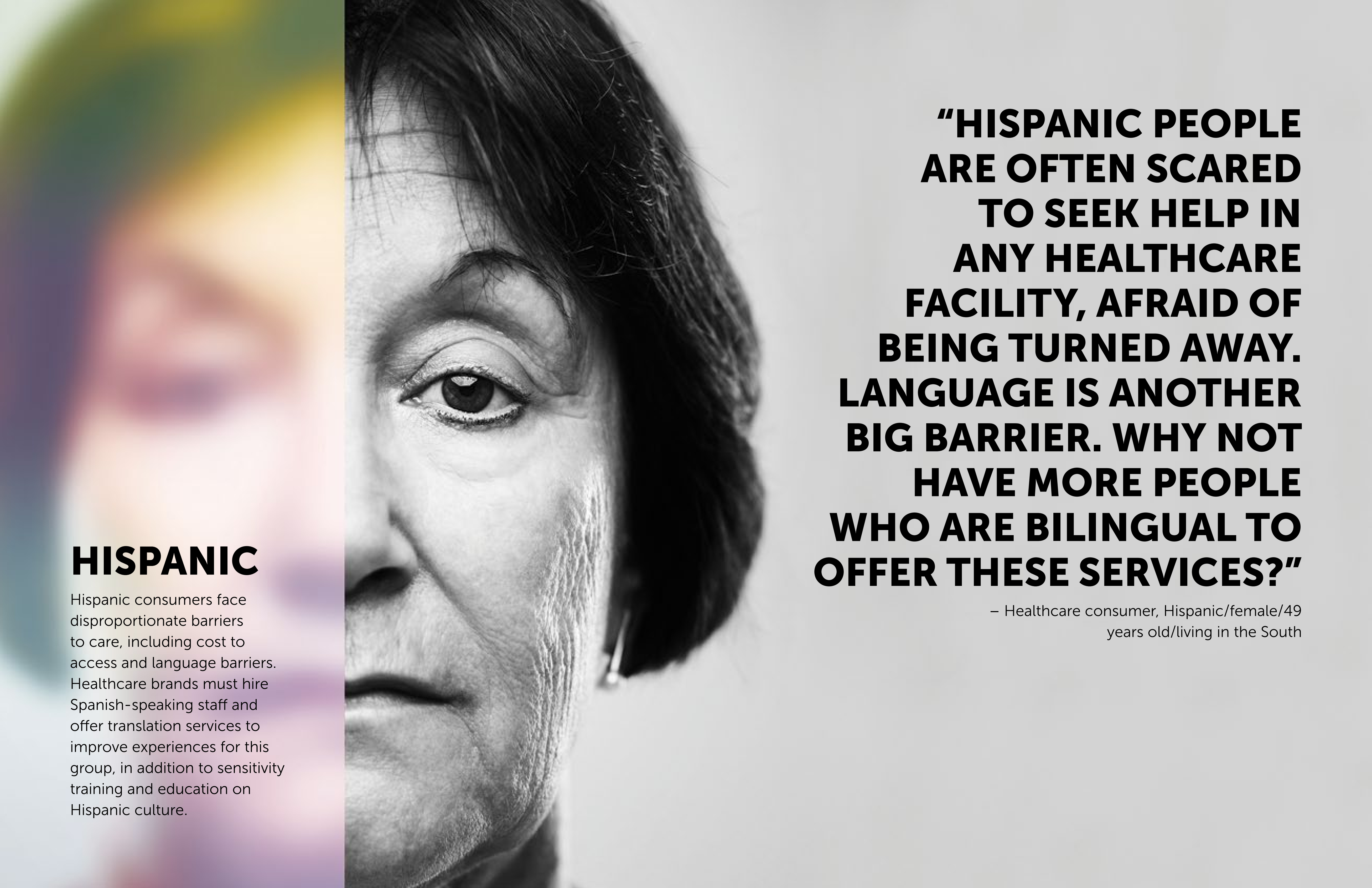
"Better care for and education about trans people, from respecting pronouns to updating forms with appropriate gender markers."

– Healthcare consumer, identifies as female/LGBTQ+/36 years old/living in the Midwest

2 IN 5 LGBTQ+ CONSUMERS FEEL THAT HEALTHCARE ORGANIZATIONS CAN DO MORE TO BE INCLUSIVE OF THE COMMUNITIES THEY SERVE.

"Personally, I feel larger healthcare organizations need to drop the religious aspect as it hinders the entire human scope. If we can do that, we can get past so many things and add more diversity from so many levels."

– Healthcare consumer, identifies as male/LGBTQ+/43 years old/living in the Midwest



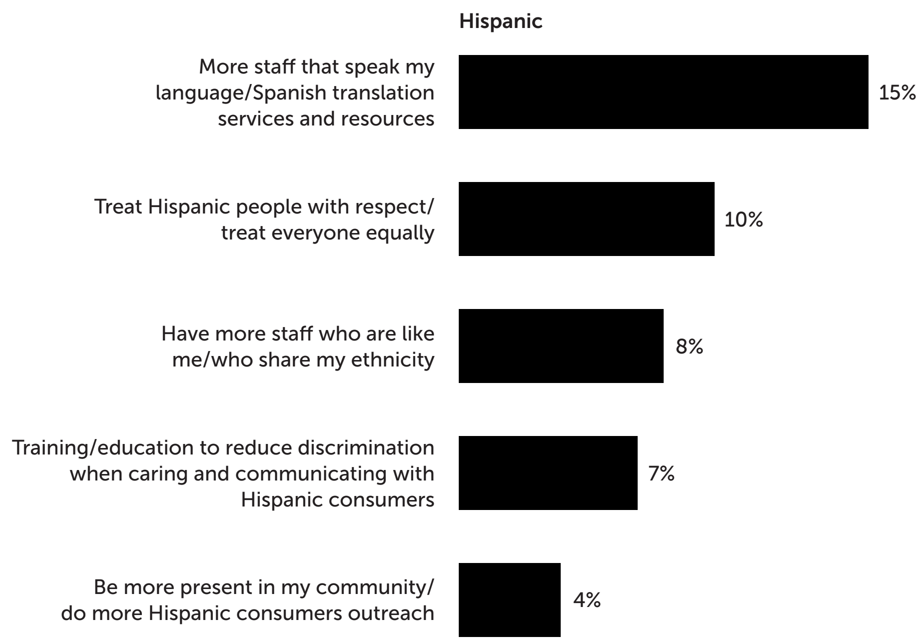
HISPANIC

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



Coded open-ended responses to the question: As someone who identifies as [HISPANIC ETHNICITY], how do you think healthcare organizations can better serve you and be more inclusive of the Hispanic community?

"[Healthcare organizations] need a better understanding of the Hispanic family system."

– Healthcare consumer, Hispanic/male/40 years old/living in the Northeast

"As a Hispanic, a way healthcare organizations can better serve and be more inclusive of the Hispanic community is by including more Spanish-speaking resources and making them easily accessible. There are resources; however, they are not widely known or readily available to the community."

– Healthcare consumer, Hispanic/female/24 years old/living in the South

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.

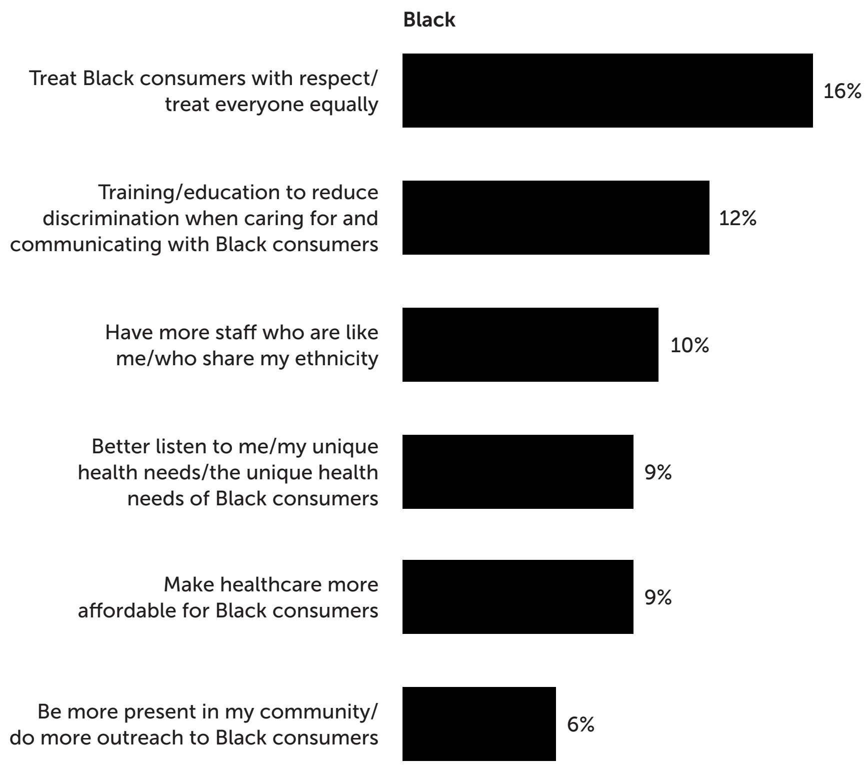
BLACK

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



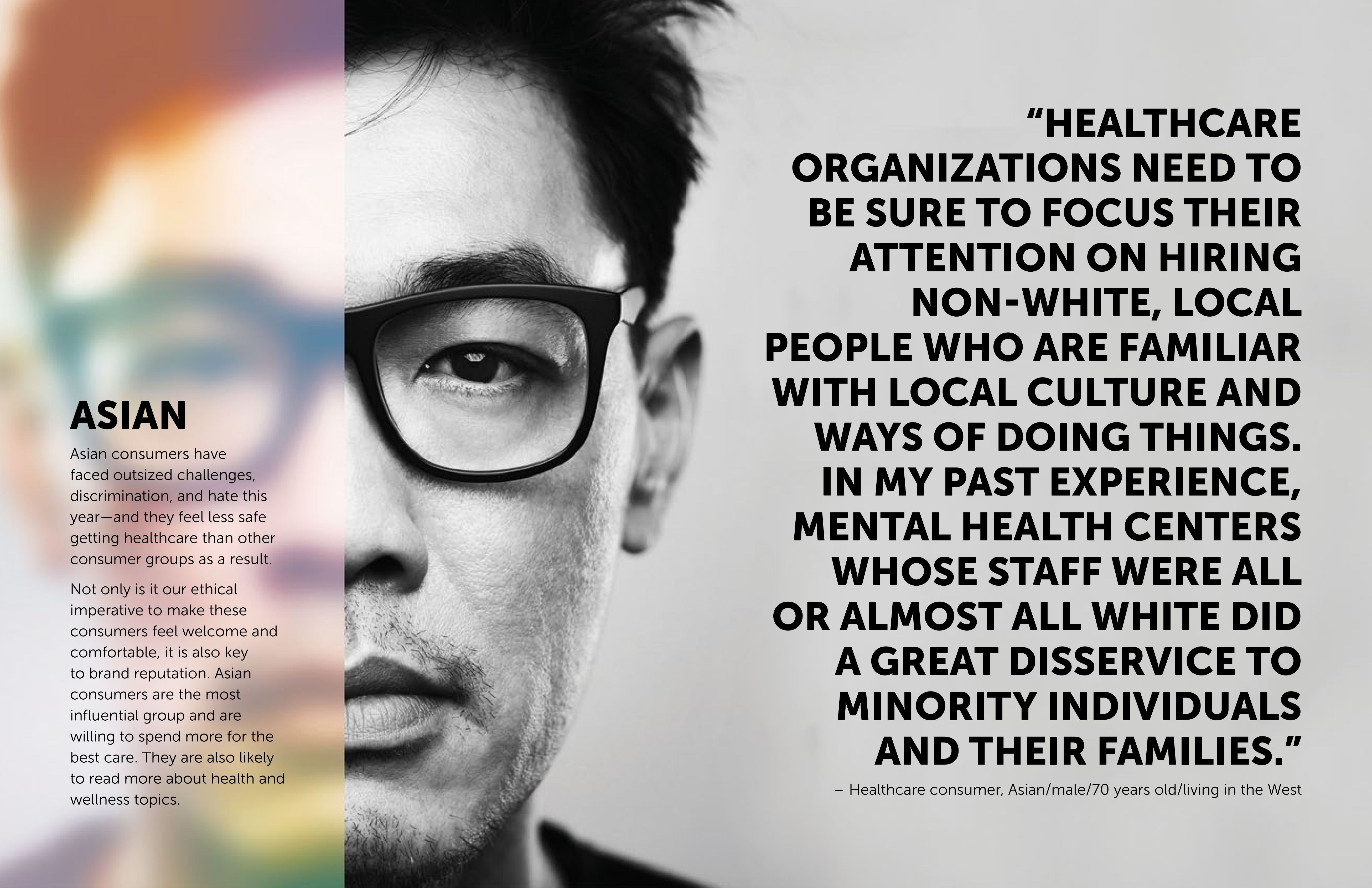
Coded open-ended responses to the question: As someone who identifies as [BLACK ETHNICITY], how do you think healthcare organizations can better serve you and be more inclusive of the Black community?

"By understanding the common illnesses and diseases that impact the African-American community and offering treatment or advice that can help reduce that risk. Helping African-Americans who don't receive health insurance, by referring them to nonprofit organizations that offer free medical care."

– Healthcare consumer, Black/female/35 years old/living in the South

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

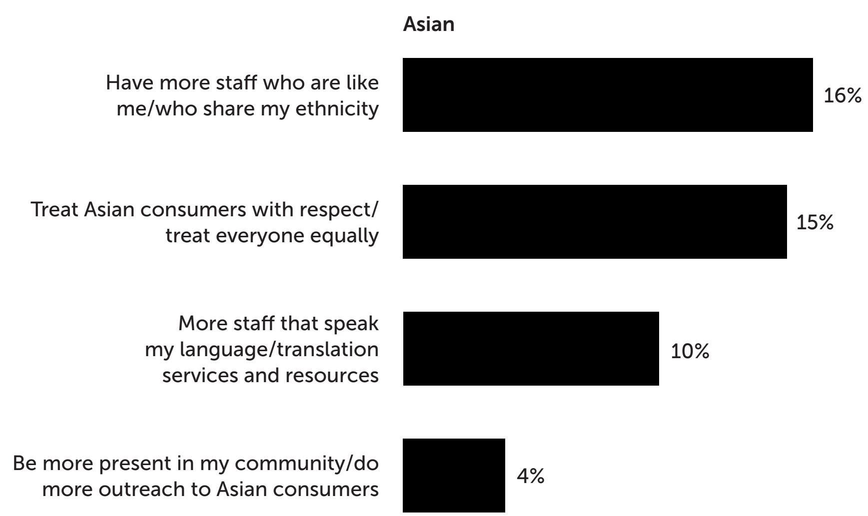
Asian consumers have faced outsized challenges, discrimination, and hate this year—and they feel less safe getting healthcare than other consumer groups as a result.

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



Coded open-ended responses to the question: As someone who identifies as [ASIAN ETHNICITY], how do you think healthcare organizations can better serve you and be more inclusive of the Asian community?

"I think having more community engagements to educate health and wellness for Asian communities would help since our lifestyle and diet is very different from other races."

– Healthcare consumer, Asian/male/39 years old/living in the South

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

Go to Table of Contents

Chapter

08

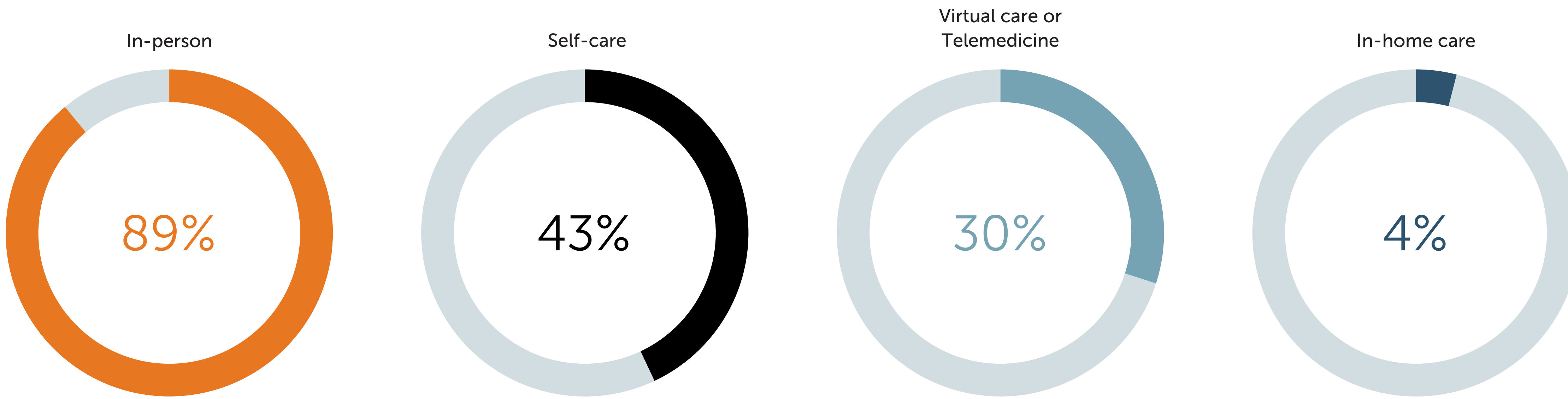
Virtual care is the new frontier

It's not a fad; it's the future. Telehealth is here to stay, and it's time to make sure our virtual experiences work as hard as our physical ones.

During the pandemic, many healthcare brands quickly pieced together a patchwork of virtual care services. But consumers' appetites for in-person alternatives appear to be here to stay, with one in three consumers already using telehealth services.

Virtual healthcare offerings are the new frontier—if we can put aside what we think we know, listen to what consumers actually want, and invest in improving the experience.

2022 HEALTHCARE CHANNEL USAGE—ALL CHANNELS USED TO MANAGE HEALTH



19%

of healthcare consumers want access to virtual care faster

12%

of healthcare consumers want the virtual care experience to be easier

Easy wins

A healthcare brand's historic concerns about telehealth aversion due to privacy and safety concerns plus lower-quality experiences have proven to be overblown. More important to consumers are **choice, ease,** and **speed of access**—all things that are made possible by strengthening our virtual care portfolio.

% of U.S. healthcare consumers selecting which channels they use to manage their health or receive care

Coded open-ended responses to the question: Thinking about the future of Virtual Care,* what can healthcare organizations do to make the Virtual Care experience better for you? *Also known as Telemedicine or Telehealth—uses online video, audio, and instant messaging to connect you remotely to a doctor/healthcare professional through your computer or mobile device

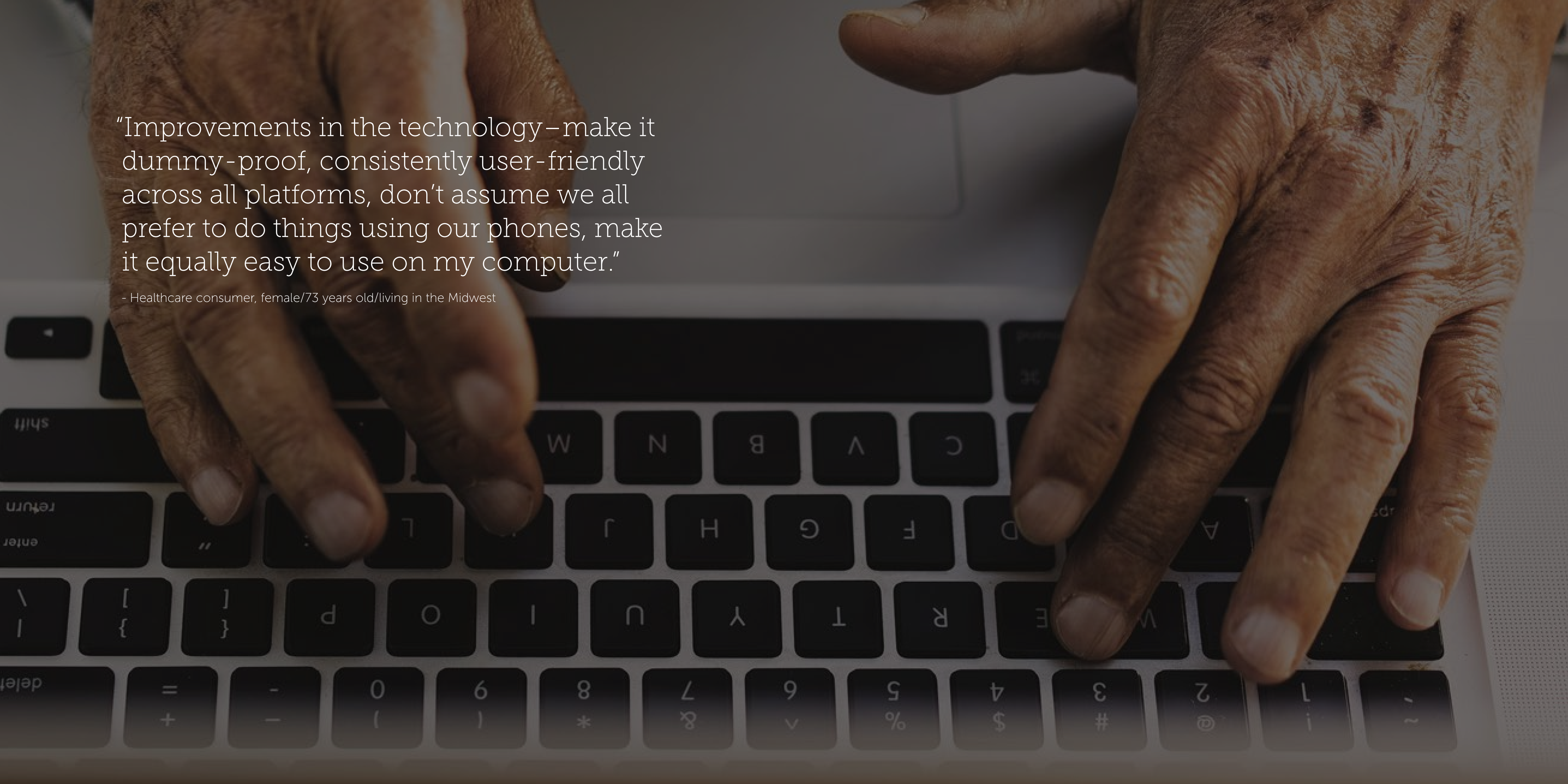
Meet your new rivals

Entering the virtual care space transforms how consumers perceive and evaluate their experiences. It's no longer about whether one doctor is better than the one down the road. We're now being measured against every digital experience consumers have across their daily lives. The benchmark for speed is set by Amazon. The benchmark for easy is set by Apple. We're playing a new ballgame now, and that means new rivals to look to for ideas and inspiration.

Did you forget the Disruptors?

Born in the age of the internet, Disruptor brands are way ahead when it comes to telehealth. Consider **Parsley Health** and **Forward**; both brands offer 24/7 access to virtual healthcare, advice, and support.

Not coincidentally, Parsley Health still has the strongest equity with consumers in the U.S., according to our HBE model. While Parsley Health may not feature in our published rankings, they are well ahead of leading system brands.



"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

Virtual care opens new doors to equity

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

Get to know your virtual care goals

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.

Parents, Millennials, and Gen-Z are already on board

Younger consumers are more open to in-person alternatives like virtual care and even in-home care (more on that later). As our brand's future users, it's important to earn their trust and loyalty—and they've proven to be a fickle bunch, who aren't afraid to move on if our experiences don't work for them.

Also open to virtual care are time-pressed parents, who are accustomed to deprioritizing their own health, care, and wellness needs for those of their kids. As any parent knows, **fast** and **easy** are essential table stakes when kids are involved.

2022 HEALTHCARE CHANNEL USAGE SPLIT BY AGE AND CHILDREN IN HH

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

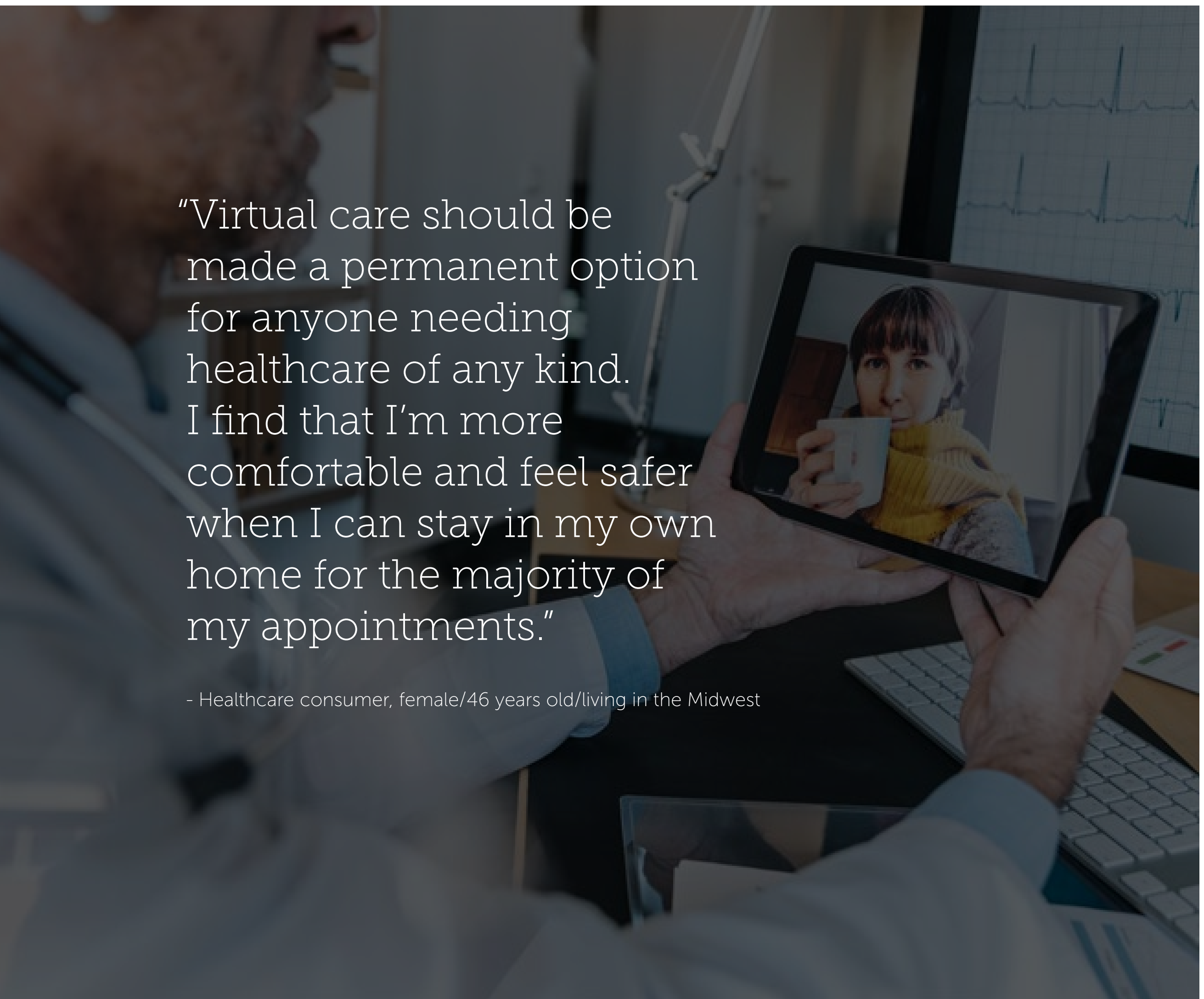
Indices of U.S. healthcare consumers by age group and parental status based on which channels they use to manage their health or receive care.

“But virtual care isn’t for everyone!”

For years, we’ve heard this excuse from healthcare leaders as a reason to avoid investing in telehealth tech, and it’s time to leave it behind. Today’s consumers want the option to make the decision for themselves, based on what’s most convenient for their life.

“First, always give people the choice to use virtual care or not.”

- Healthcare consumer, female/74 years old/living in the West



“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

While it’s true that not all services are virtual-ready, a clear formula is emerging. Ongoing, non-urgent, and wellness services that don’t require physical evaluation or testing are the hardest-working virtual options. That could include:

- Primary care visits
- Prescription refills
- Test result reviews
- Mental health check-ins
- Some pediatrics
- Digestive health
- Weight loss

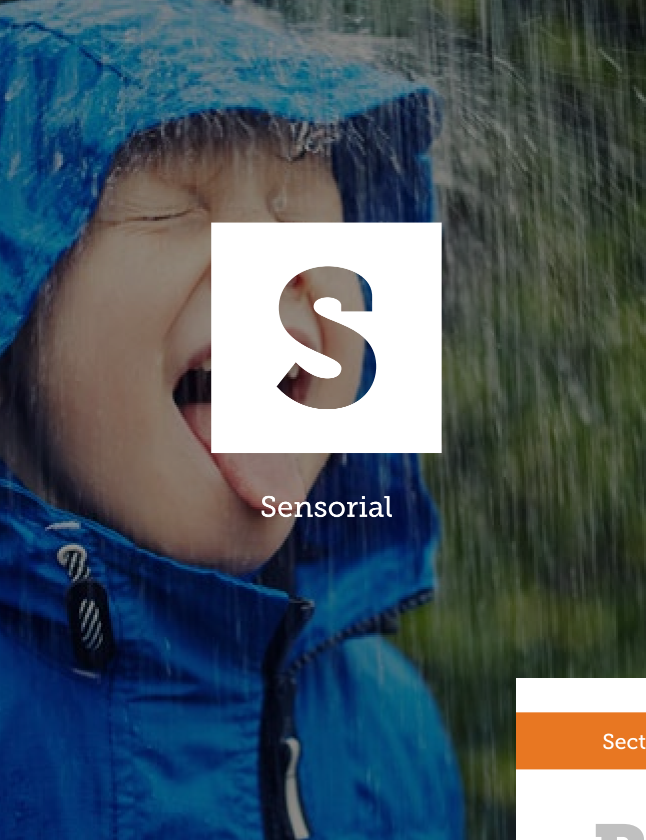
Virtual care is the new “go-to” for mental health. 22% of virtual care users receive behavioral health services.

Anything that’s more of a “check-in” than a “check-up” could be delivered easily and efficiently via virtual care.

2022 CHANNEL USAGE BY SERVICE LINE—VIRTUAL CARE VS. ALL CHANNELS

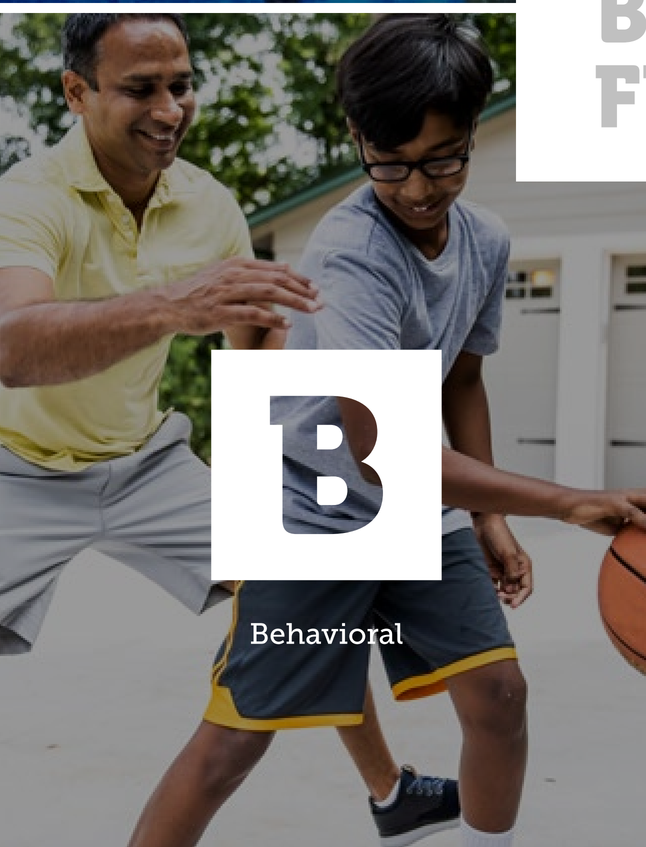
	Service line usage within virtual care	Service line usage across channels
Primary care	63%	75%
Behavioral health* (treats mental health and wellbeing)	22%	10%
Specialty care	13%	16%
Digestive health* (treats gastrointestinal issues)	10%	10%
Pediatrics	7%	7%
Women’s health	7%	24%
Neurology* (treats diseases 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%

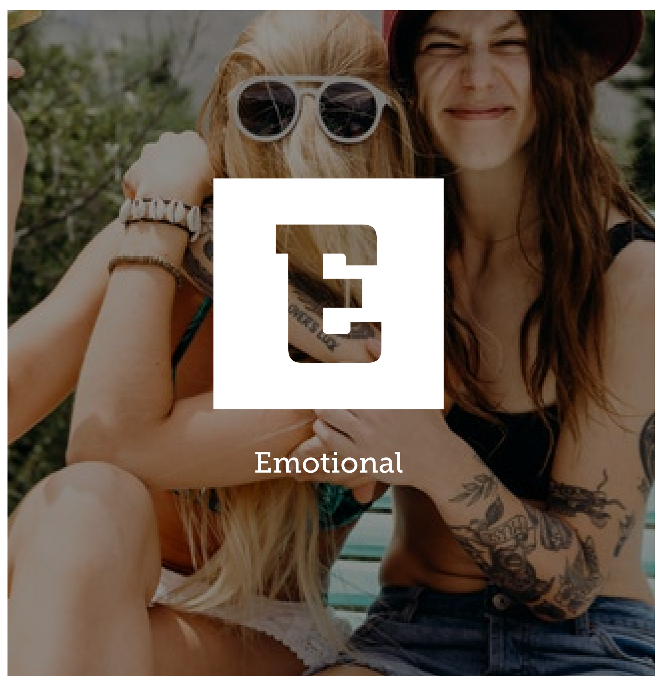
% of claimed service line usage (last 12 months) by all channels compared to virtual care among U.S. healthcare consumers.



Section:

BRAND FRAMEWORK





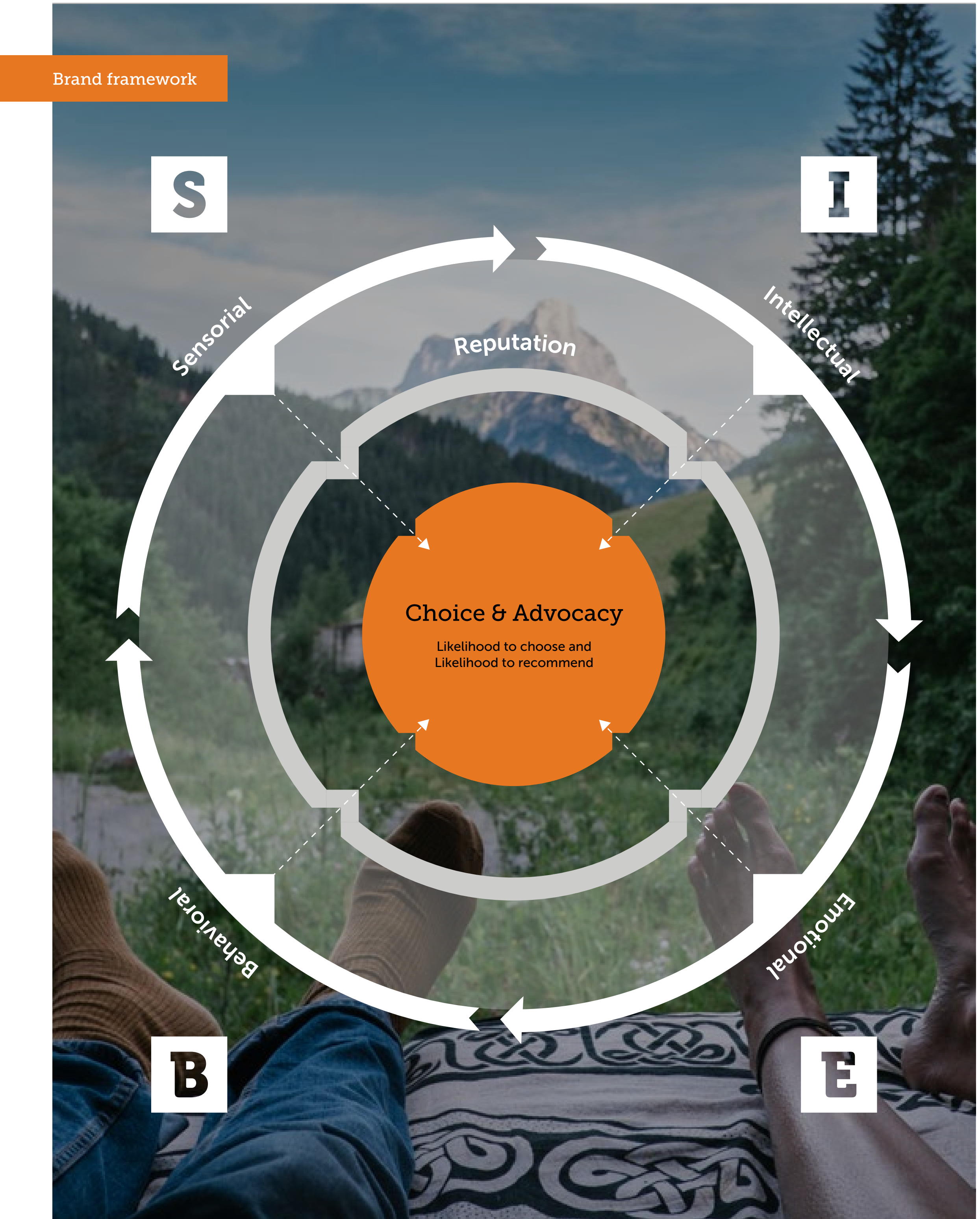
A note on this year's model

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 within 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.



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 Humanizing Brand Experience brand rankings are based on the composite score from this model, weighted by market to reflect varying category engagement.

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

Derived importance score and rank based on Shapley Value Regression

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

Derived importance score and rank based on Shapley Value Regression

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

Derived importance score and rank based on Shapley Value Regression

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

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

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 HBE 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

The "pandemic glow" is fading

Last year's report showed incredible performance improvements among certain brands. Those meteoric leaps up the rankings have diminished this year, and again we have COVID to blame. As the pandemic's impact continues to shift, the stories of leadership, heroism, and stand-out behavior have become just more noise—and consumers are refocused on frustrations with healthcare experiences that aren't built for people's needs.

*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 2021). Some brands may have evolved or been updated since that time.

Brand rankings

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*

*Multiple markets NET score

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
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

*Multiple markets NET score

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

*Multiple markets NET score

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

*Multiple markets NET score

Brand rankings

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

*Multiple markets NET score

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

*Multiple markets NET score

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

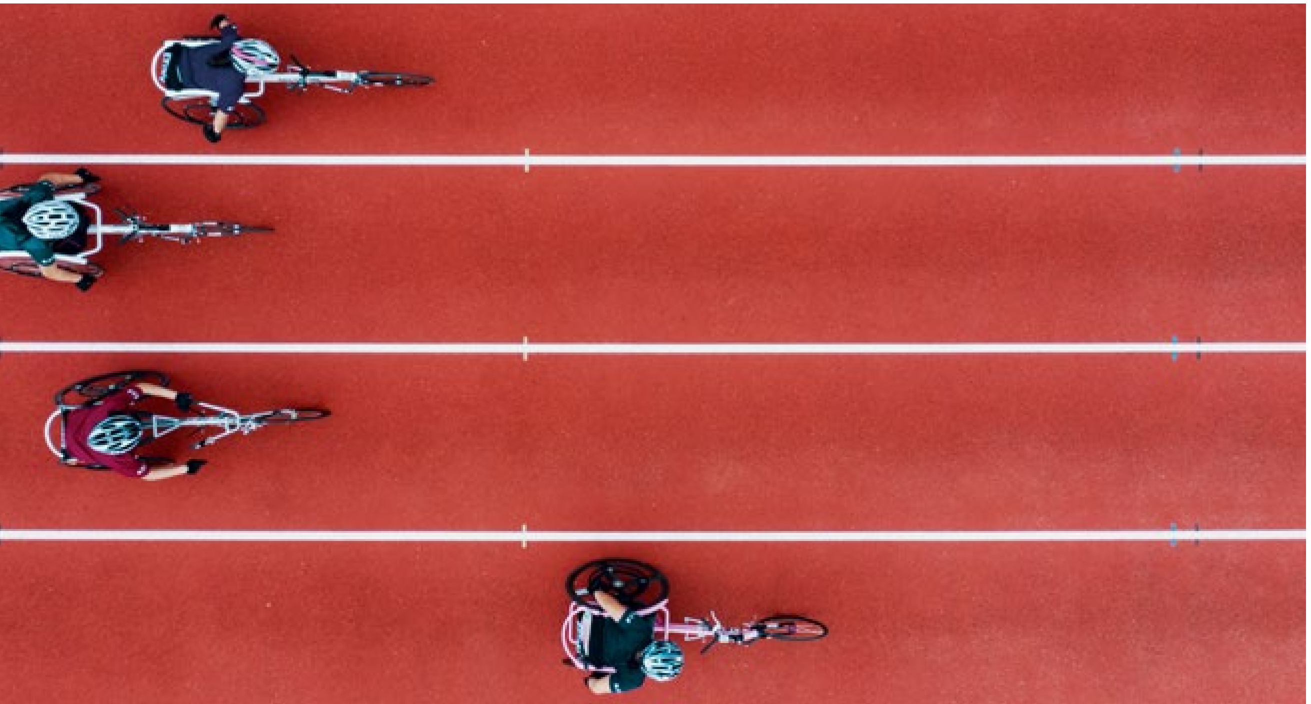
*Multiple markets NET score

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

*Multiple markets NET score

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



Top 5 new entrants 2022

Brand	2022 National Rank
UC Davis Health	4
Bellin Health	26
Dartmouth-Hitchcock	42
Edward-Elmhurst Health	53
Saltzer Health	87

7 Disruptor Brands in 2022 with scores higher than Cleveland Clinic

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

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

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

Top 10 brands that "have the best people"

Rank	Brand
1	Mayo Clinic
2	Valley Health System
3	University of Miami Health System
4	University of Michigan Health
5	The Christ Hospital
6	West Hills Hospital and Medical Center
7	The Ohio State University Wexner Medical Center
8	Brigham & Women's Hospital
9	UCSF Medical Center
10	UT Southwestern Medical Center

WILLIAM "SKIP" HIDLAY

This year's rankings revealed an impressive rise for **The Ohio State University Wexner Medical Center**, now sitting in the #2 spot on our Humanizing Brand Experience rankings. To make this accomplishment even more notable, it took place in one of the hottest healthcare brand markets in the U.S.: the top-three best-performing brands are all based in O-H-I-O.

We spoke with William "Skip" Hidlay, Chief Communications and Marketing Officer, to explore the humanizing strategies he and his team have implemented to make a mark in their highly competitive market.

Monigle: Skip, we'll cut right to it: we are dying to know how you did it. What has made the Ohio State brand so successful over the last year?

Skip: This was a complicated year for healthcare, but we were committed to transparent education and leadership around COVID-19. We were starting from a strong position with Ohio State's well-known and respected brand. When misinformation was rampant on every social media platform, we were a source of truth, and the Ohio State brand gave us instant credibility. And it wasn't just Ohio State doing this. At every single health system in the nation, it was our shared mission to deal with the facts and the science.

During this time, our team expanded on our strong partnerships with our physicians, and we led with their expertise. We never stopped marketing and had an always-on earned, owned, and paid media strategy across traditional and digital platforms. We never went silent. Our physicians always made themselves available to help educate our communities and combat misinformation.

One thing that might surprise you is we produced a half-dozen new TV spots with our internal video team during the pandemic. All of them featured our physicians, nurses, and other staff promoting vaccine safety, telehealth, safe in-person care, and the need to get timely screenings for cancer and other life-threatening illnesses. We played these new spots on the highest-profile TV events–the Super Bowl, the Olympics, March Madness, and, of course, Ohio State football. I think this showed the community we were there for them no matter what the pandemic threw at us.

Monigle: Beyond COVID-19, what else has powered your team?

Skip: We've made sure that our senior leadership team is well versed with our brand experience and marketing goals. We've been hugely supported by our colleagues at the senior leadership table.

Let me share an example: As vaccines became available at the end of 2020, that was a pivotal moment of hope for the nation. With the support of our senior leaders, we opened our vaccination center to any media who wanted to come, and we received great exposure and coverage. That helped us get recognized as a leading national brand and a leading source of truth and excellence.

And sometimes you just get lucky: we had an opportunity to host President Biden at the James Cancer Hospital to celebrate the 11th anniversary of the Affordable Care Act. That was another golden opportunity that was great for our brand storytelling.

"Having a unified approach among our senior leadership team has been critical."

Monigle: Leadership buy-in is something that many healthcare brands have struggled with—any advice?

Skip: It's helped that we've had an infusion of new senior leadership at Ohio State, and we all have great relationships. We get along, and we focus on moving the organization forward together. Everyone's opinion is respected. We all share the awareness of how important brand experience and patient experience are, and our senior leaders value strong marketing and communications as a way to create trust and deliver human experiences. We've made sure everyone is aligned. Our physicians know our brand and value it.

Monigle: You mention communication as a way to build human experiences; How have you approached content and communications strategy this year?

Skip: People don't remember facts and figures—they remember great stories that connect with them emotionally. I've tried to break down silos between the marketing, communications, PR, and digital strategy disciplines. Most places I've worked have been very siloed when I began, but I see my role as fostering integration and creating a collaborative, creative culture where everyone is focused first and foremost on identifying great stories. I believe great marketing campaigns are built on a foundation of powerful owned media storytelling on the web and social platforms.

"At my core, I am a brand storyteller. And I believe in the modern era, content is marketing, and marketing is content. It all starts with great content."

Monigle: Taking a journalistic approach means being very tapped into what's happening in the moment. How does that come to life for your team?

Skip: We have a team that listens to trending questions on Google and on social media, so that we can build content that answers the questions that consumers have in "real" time. That helps us meet people in that moment. We also partner with our physicians when sharing content, which adds credibility and builds trust in our brand.

I think our opportunity as a leader in healthcare is to be a trusted source of information for people. We know physicians and nurses are among the most trustworthy individuals, and to a lesser extent hospitals and health systems are. We lead with our clinicians and their expertise; they are the core of our marketing strategy and storytelling, and we make sure their voice is heard.

Monigle: That's so important; we know from our study that having the "best people"—aka physicians and employees—is exactly what drives consumer decision-making and trust. How else has data influenced what type of storytelling you do?

Skip: This brings up another unique storytelling approach we've taken: building deep content packages around individual physicians and scientists. At many organizations, it's always about promoting the service lines or running grateful-patient stories. Over the years, I've found from analyzing website traffic that the best-performing pieces are about physicians, including FAQs with physicians as the source or byline, or any content about research advancing care at the bedside.

The essence of what we are after is explanatory, informative storytelling, with a humanized angle. That is the content we've found people are looking for: quick health answers based on what's trending and then deeper, detailed content based on physicians and their medical research.

Monigle: More and more people are doing their own research, and this is exactly what we've been seeing people asking for: trusted, credible healthcare information sources versus some random content site.

Skip: There's a misconception in healthcare marketing that people won't read long pieces. But if I'm diagnosed with cancer, then I'm going to do as much research as I can. The data all shows that people aren't just accepting what their family physician tells them to do anymore. And I've lived and observed that in my personal life.

So, if you are researching a health condition and you find a deep profile about a scientist doing cutting-edge research in that area, you are more likely to say–well, that's where I want to go. I want to be treated by someone world-class, someone with the expertise. That's the type of content we are trying to build.

Beyond that, earned media validates the power of the brand. If an Ohio State doctor is expert enough to be quoted in the *Times*, maybe I will think about them if I need healthcare, or when I'm deciding where to go to medical school or where to do my residency. We want to attract the best and the brightest students, residents, and fellows, and that's part of our marketing team's goals.

"I don't want our stories to read like something you expect to find on a medical center website. I want our work to be the quality of something you might read in the *New York Times*, *The Wall Street Journal*, or *The Atlantic*."

Monigle: All right, last question. We've got to know, what's going on in Ohio? What's the "Humanizing" magic?

Skip: There are really progressive things happening in the healthcare market here in Ohio. We all compete with one another, but we also collaborate. It's healthy competition, and it's the right kind of competition. Throughout the pandemic, we were collaborating and doing things in unison. All of our marketing campaigns were supporting the same key messages and mission to educate. We are in great company here in Ohio, and we all push each other forward to be better, together.

Section:

IMPLICATIONS AND KEY TAKEAWAYS

2022 Healthcare Brand Playbook

Strategies for 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 human-ness 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.

*Yep, we actually heard that from a client.

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 our consumer segments. Please—take it and go use it. It will make an immediate impact on how you view your market. The segmentation report comes with a typing tool that you should be porting directly into your CRM. Start there.
- **Build your own segmentation model:** 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.
- **Build your segments into your systems:** Craft a typing tool that is tied to your electronic health record. Add segment-specific questions into your standard patient engagement process and use it to tag individuals (this should be bolted into your CRM too!). This can provide incredible richness, balancing consumer-based behavior data with actual usage experiences. The analysis opportunities are endless.

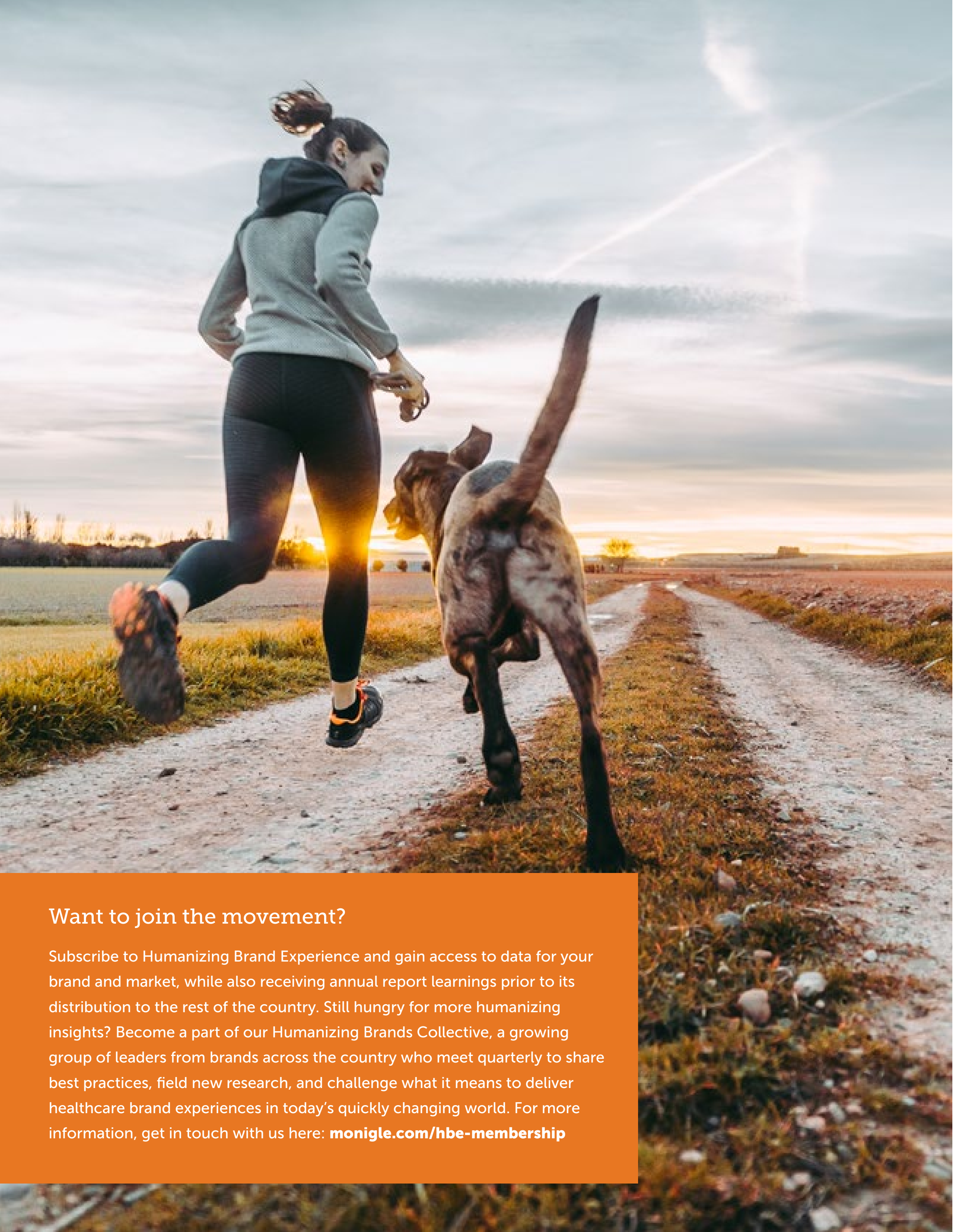
5

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, which are actually big things to those who are impacted by them.
- **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 a 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**

No rest for the weary. Isn't that the phrase?

Despite the innumerable challenges of the last couple of years and the incomparable stress of leading your teams and organizations, the hard work lies ahead.

We face unprecedented permissions from our consumers to play an evolved role in their lives, to impact their health experiences in new ways, and to define a more human future for us all.

Let's work together to lead our brands, our cultures, and our experiences to new heights. The time has never been more right. Onward.

Methodology and details

THE HUMANS

Healthcare decision-makers for the household who 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 = 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, Cluster Analysis, MaxDiff, Shapley Value Regression, Structural Equation Modeling (SEM), and Weighted Moving Average (WMA) scoring

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**.

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AHA Data & Insights