VOL. 6 HEALTHCARE EDITION

Humanizing Brand Experience

monigle

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Welcome back, reader.

Hello again to our health, care and wellness leaders. We're so grateful to spend a bit of time with you here in the sixth volume of our Humanizing Brand Experience report.

Like 2021, 2022 pulled no punches. So in keeping with that spirit, we're not going to bury the lede. Friend, the outlook is dreary. Across the country, we're finding a less engaged population that appears hungry for answers and alternatives to what we as healthcare brands have historically brought to the table. The challenges are coming from every angle—people dodging doctor's offices, digging deeper into self-care and asking our organizations to fix the problems of access and ease that make the decision to delay much needed care that they so desperately need.

At the same time, we're staring into the unknown—a new world with fewer resources, bigger goals, new approaches to working and leading. We're in a race to find and use new tools and technologies to leverage partnerships to be ever more efficient and impactful. It's almost as if we're working and relearning our jobs simultaneously, at a time when the rules of the game are shifting around us. It's unnerving. And it's a lot.

What's better than hearing from us? Hearing from your peers.

We believe that the power of Humanizing Brand Experience is the ability to translate insights into action. So, this year, rather than just share our perspective, we've invited some of your peers to help author stories about how these types of insights are impacting their own work. These contributors are making brand, experience and culture change a reality, and their stories and unique perspectives have brought this year's report to life in a whole new way. We hope you enjoy it, and we can't thank our authors enough for their participation and generous contributions.

But herein lies our opportunity. Because there's never been a more exciting and more potentially world-changing time to be part of this industry. Right now, we're standing shoulder to shoulder with people who are tackling the realities of health, care and wellness head on, in thought-provoking and category-defining ways.

We see you, data-centric CPG marketer, working tirelessly to unpack the value of marketing investments. We see you, storyteller, transforming the moment into a movement that can rally tens of thousands of employees around a more equitable approach to care. We see you, savvy communicator, using journey mapping to pose new questions to clinical leaders in ways that will actually change experiences for the better. We see you, brand steward, advocating to everyone who will listen for a unified brand approach to business at every point in the journey.

We see all of you. And you inspire us.

You're out there, every day, supporting the front lines, connecting with people and making a profound impact in big and small ways. You live an idea and an ideal that also live at the core of who we are at Monigle—making the world more human. It's our purpose as well, and it sums up our passion for this industry and our enormous admiration for what you do and who you serve.

We hope the insights and perspectives brought to life in this year's report will help you to join your world-changing colleagues in our collective pursuit of humanity, connection and impact.

Onward.

Your Monigle Team

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Chapter

01

Healthcare engagement is stagnant

The malaise is real

As you can see from this year's Healthcare Engagement Index on page 9, the industry is struggling to break people out of their continued rut when it comes to engaging with healthcare. The main reason might not be all that surprising to any of us: everyone is exhausted by the overabundance of noise in the market. Pandemic fatigue has demotivated consumers and tamped down their interest to re-engage, making the return to pre-COVID levels even more challenging, let alone finding opportunities to grow new relationships.

Where's the spark that will reignite relationships?

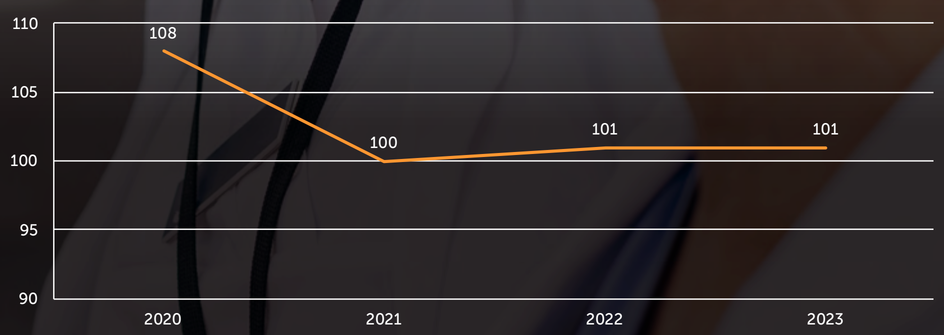
Remember why engagement matters—if consumers are more engaged in healthcare, they're more open to understanding why your healthcare brand, culture and experience are better than an alternative. If consumers are less engaged, we have to first bring them closer to the category before we can convey what makes us different from an alternative. And this represents why reigniting engagement is such a challenge.

Right now we're all focused on business performance, which means getting people to engage with our brand instead of another. This applies to both patients and staff. Brands are trying to attract both of these populations so that we have the procedures we need and the staff to deliver them. The problem? With the less engaged population that we're seeing across the nation—sometimes in more pronounced ways in specific geographies, as you can see in the map on pages 16 and 17—people are just not as open to hearing why you're special. Given today's realities, a two-step process for messaging and engaging will work best. First, bring people closer to health, care and wellness. Second, get them to notice you and understand why you're better or different.

A shift in terminology?

Throughout Humanizing Brand Experience, you might notice a change in our vocabulary, and we'd like to explain. In the past, we've talked about our work and our focus together as "healthcare"—a well-established definition of the industry in which we live and breathe. However, this definition is shifting as consumers move more seamlessly between the worlds of health, care and wellness. It might seem less obvious to some, but we believe it's an important evolution and one that we'll be integrating into our work with thoughtful intent. After all, the future is unknown for all of us. And as we look beyond the delivery of care, we all must evolve in order to thrive at this new intersection of health, care and wellness. Putting new language around this is just the beginning for us…and you.

2020-2023 HEALTHCARE ENGAGEMENT INDEX



Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement.
Data Index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence and Advocacy

Is healthcare moving to the sidelines of our mindset?

It appears that healthcare has hogged the spotlight in our minds long enough. When you look at the three specific attributes where consumer engagement seems to be softening, each item conveys a sense of healthcare moving further away from the central concerns of the day.

What really surprised us is that the levels in this year's study are actually lower than the levels pre-COVID. Could it be true that consumers are even less interested in healthcare than ever before? Is it possible that they could be this burnt out on us at the exact moment when they need to engage with us more than ever—for the future of their health and our survival?

Only time will tell. It comes down to the fact that there's just so much heavy a human can handle at one time. People are becoming less interested in reading about health and wellness, which could reflect either a post-COVID realignment to priorities or the advent of more pressing, stressful issues like navigating a volatile economy or constantly bearing witness to rampant global catastrophes.

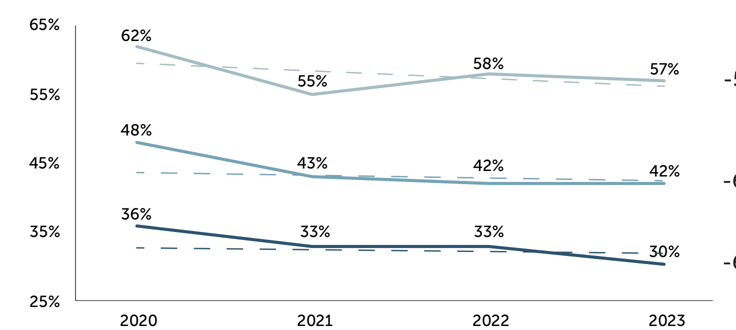
There's also a downward trend for consumers trying new approaches to care and wellness, which may reflect the challenges of having to reconcile a sense of balance in their post-pandemic lives. To that end, there are fewer people raising their hands to be the "go-to" person in their social circles for advice and recommendations. This could be because our healthcare needs feel less urgent and less political, but it could also signal a realignment with expertise. Could healthcare experts be making a comeback—over the advice of friends, neighbors or even social media? What an interesting opportunity for healthcare brands as we look for new ways to communicate a friendlier, more accessible iteration of expertise.

Is the social cache of health becoming passe?

When you look at these metrics altogether, they represent a social status that's historically associated with being healthy. Their collective decline could be signaling a change in perception around the culture of health in our country. The idea that health carries advantages for some but not all appears to be shifting as consumers become more focused on what they need to do as individuals to be healthy.

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

- I'M INTERESTED IN WATCHING OR READING ABOUT HEALTH AND WELLNESS-RELATED TOPICS
- I TEND TO TRY NEW APPROACHES TO TAKING CARE OF MY HEALTH AND WELLNESS BEFORE OTHER PEOPLE I KNOW
- MY FRIENDS AND FAMILY CONSIDER ME A "GO-TO" FOR ADVICE AND RECOMMENDATIONS ABOUT HEALTHCARE



Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement.
Data Top 2 Box Scores

2022-2023 HEALTHCARE ENGAGEMENT—ALL MEASURES

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

There's always a silver lining. And a bit of personal accountability.

OK, we admit the news around U.S. consumer healthcare engagement is not great. But there's always a bright spot to consider. And that is that more people are taking their health more seriously. They're setting personal health goals and consistently tracking their own progress to meet them. Technology-related tools play a big part in this uptick, because they make integration and accessibility so very easy. Spoiler alert: You'll be hearing a lot more about accessibility and ease in future chapters.

This represents an interesting shift from a "we" orientation of the past to a "me" opportunity for the future. Ask yourself this question now: What role are your brand and experience playing in establishing and managing the health goals of the individuals in our communities?

Your answer, or lack thereof, represents a clear strategic opportunity for your brand, your culture and your experience. Is your current positioning set up to connect or built to understand individual health goals? What's the infrastructure to deliver these points? For many healthcare brands, it starts with an app, packaged as a friendly companion that engages with advice on healthy eating, lifestyle changes and other topics that benefit wellness. But it shouldn't end there. To be truly impactful, we need to go much deeper. Reconsidering your brand's role in helping people reach their health goals can be an interesting pathway to reconnect with them in actionable and sustainable ways that matter to them.

What does health engagement look like in your market?

With national healthcare engagement levels remaining low overall, there are some pockets of minor improvement as well as a couple of markets that saw meaningful decreases. Consumers in Miami, Columbus and Los Angeles remain near the top of the engagement spectrum while new markets like Gainesville, Florida, and Charleston, South Carolina, join the top five. Some of the most meaningful decreases in engagement were seen in San Francisco, Detroit and Green Bay, Wisconsin. If you're leading a brand in these latter three markets, you've got your work cut out for you. It might make sense to connect with other health, care and wellness brands in the market to explore how your collective efforts could help bring people back into alignment with what the category has to offer.

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

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

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

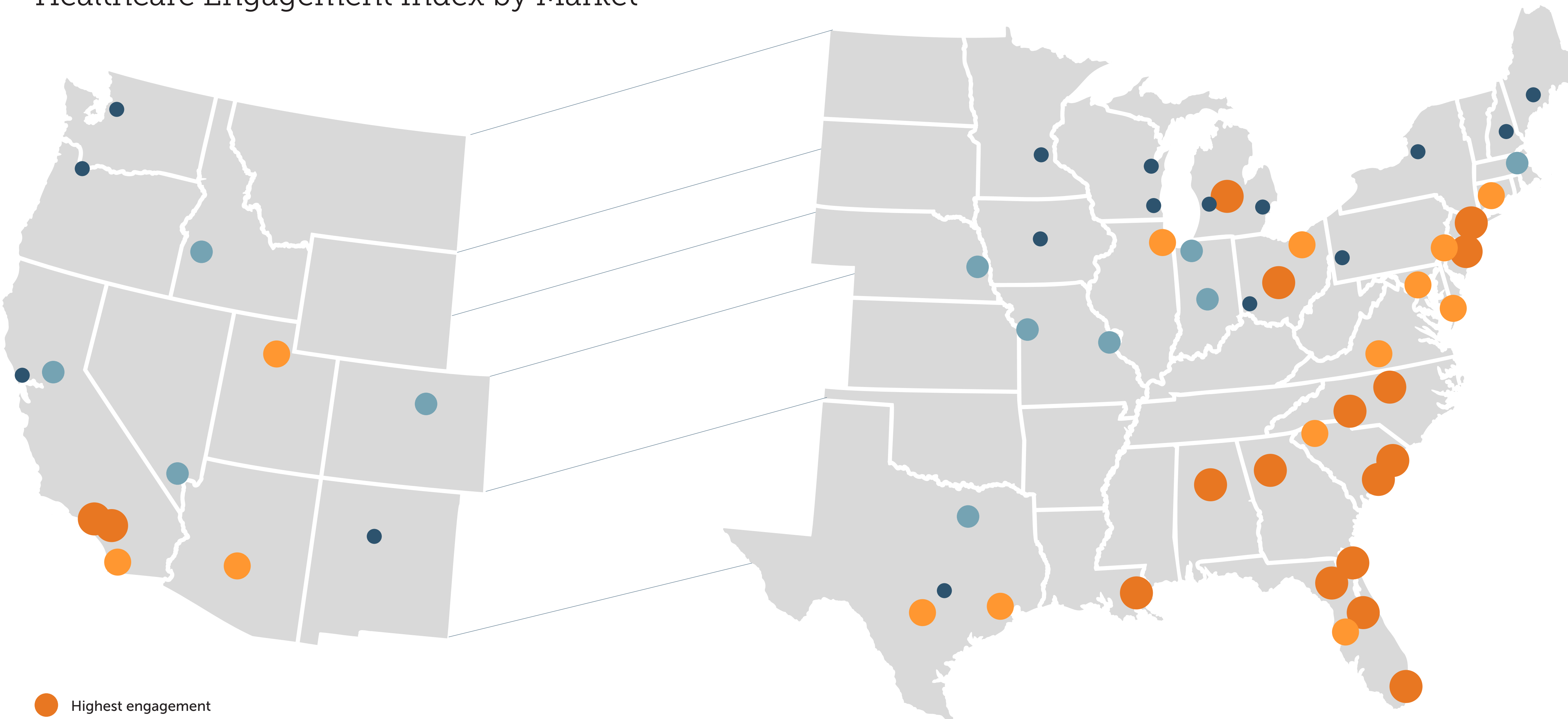
	2021 Index	2022 Index	2023 Index	Change 2022-2023
Grand Rapids	99	113	104	-9
Portland	93	110	104	-6
Pittsburgh	99	109	104	-5
San Francisco	108	116	104	-12
Detroit	107	123	104	-19
Milwaukee	92	111	103	-8
Minneapolis	97	116	102	-14
Greater New Hampshire	*	109	101	-8
Albuquerque	98	109	101	-8
Seattle/Washington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

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

Base All U.S. nationally balanced respondents 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement.
Data Index score based on average health and wellness engagement across selected indicators: Emotional Value, Proactivity, Symbolic (Financial) Value, Topical Interest, Innovativeness, Influence and Advocacy

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

Healthcare Engagement Index by Market



- Highest engagement
- High engagement
- Low engagement
- Lowest engagement

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

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Chapter

02

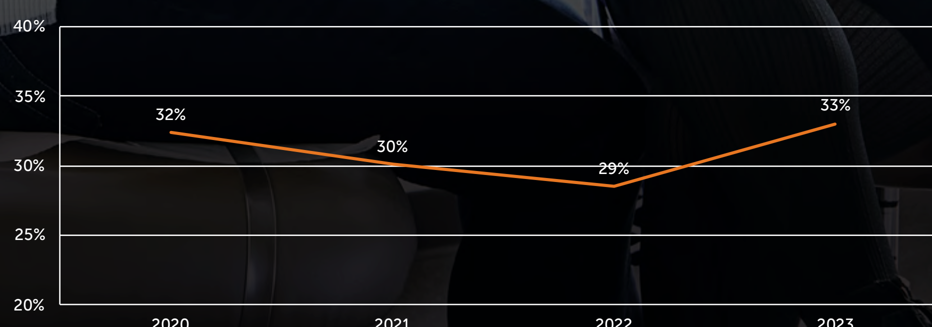
Distrust in providers is growing

The trust conundrum

Trust is a powerful attribute, but it can also be tricky business. When it comes to brand, experience and culture, the role of trust is one of the most complicated concepts to decode. Like with any interpersonal relationship, organizations can't just say they're trustworthy and leave it at that. Consumer trust has to be earned. This results in a trust dilemma that we, as leaders, must work to resolve to build equity over time.

2020–2023 HEALTHCARE ENGAGEMENT–CONTROL

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



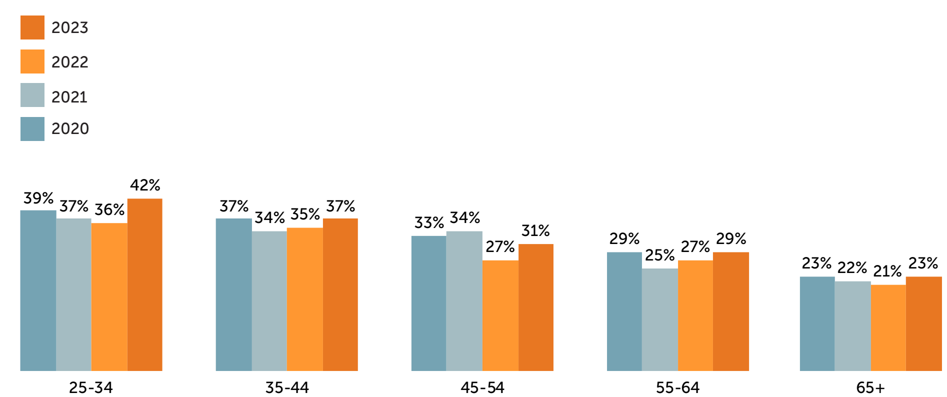
When we look at the trust attribute in Humanizing Brand Experience, we quickly see that distrust in healthcare is higher than ever. We've spoken at length in past reports about the goodwill-inspired trust bump that likely came as a result of individual brand's and our collective industry's COVID response, but this improvement is now gone. People have gone back to trusting our brands even less than they did before COVID.

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

Unsurprisingly, trust is softest among younger demographic groups—which makes sense, because they've had fewer opportunities to build any with us. Couple that with continued healthcare malaise (see Chapter 1 on category engagement), and the dwindling opportunities to build trust continue. And if these younger consumers are less engaged (much like the rest of the country) and we can't get them in to see us (due to either ease or access)—well, then, how do we build trust with them? We know this is the group of people who represent future health, care and wellness consumers. But the future has to be now if we hope to rebuild our businesses in a post-COVID environment. How do we flip the script…and fast?

DISTRUST OF HEALTHCARE PROVIDERS BY AGE GROUP

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



Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with each statement.
Data Top 2 Box Score

Pathways to trust

While we can't simply tell people to trust us, we can absolutely glean two things from our findings: which attributes across our Humanizing Brand Experience have a high likelihood to positively impact trust and which ones seem to erode it.

The best way to build trust? Start with focusing on your people from different angles.

Look at the top five attributes on the right. Three of them relate to your people—who they are, how you treat them and how they treat others. We all know that health, care and wellness is a people-driven business, but how often do we make it easy for our people to be at their best?

The most strongly correlated attribute to building trust revolves around care demonstrated by staff. Which makes complete sense. If you're happy and proud of the work you do and where you're doing it, it shows. Two other top-five attributes relate to the respect healthcare brands show their staff, as well as having enough staff to deliver the right experience, with the latter presenting a challenge for most of our industry at the moment. Leaning into EQ matters more now, so rounding out the top five are attributes about how our people make our patients feel. The self-care attribute is all about empowerment and how we enable people to take control. Individualization is all about how our people—our brand and experience—make people feel like they are the center of our universe.

It's a simple but challenging equation. If you want to build trust, find great people and enable them to make your consumers and your patients feel great at every turn.

Wait a minute...where's quality?

Interestingly, Quality Outcomes made the top ten in terms of strongest correlations to trust, but it wasn't at the top. Further, this was the only Intellectual attribute that strongly correlated with trust, which is especially interesting because our industry has historically featured Intellectual attributes in our messaging and communications efforts.

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

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

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

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

TOP 10 MOST TRUSTED HEALTHCARE BRANDS

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

The standouts

There are brands out there—both big and small—that are effectively crafting more trusted relationships with consumer audiences. And while they represent the highest levels of consumer trust in our industry, each offers opportunities to further improve performance on this attribute.

Bringing trust to life

Following are two best practice examples from the playbooks of brands that are doing trust right.

Emory Healthcare

Emory Healthcare builds trust through a people-centered **New Care Transformation Model**, which places a strong, central focus on the staff, patients and their families. *Sound familiar?* People are at the center of trust-building. The care transformation model is defined by five attributes: *patient- and family-centered care, a fair and just culture, shared decision-making, transparency* and *cultural competency and diversity*. The model focuses on staff because great patient care comes from people who actually care—a team of individuals who simply love what they do and feel empowered to share it. This people-centered approach also highlights shared decision-making and patient-focused care—allowing patients, families and caregivers to be involved and informed as they participate in health, care and wellness decisions.

Mayo Clinic

In Mayo Clinic's "Why Choose Mayo Clinic" section, the brand outlines its approach to care: Create individualized plans for patient care with a team of specialists who work together to deliver what is needed—not what's dictated "by the book," but rather an accurate diagnosis with a carefully curated plan. This is textbook trust-building if we look at it through the attributes that matter: tailored solutions, a team approach that values voices and custom care plans based on what individuals need. This approach unleashes trust from both internal and external audiences, building over time.

*Multiple markets NET score

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Chapter

03

Systemness still has its benefits

The culture of systemness

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

If I had been asked to write about systemness before joining UCSF Health, this would be a very different story. I would have probably started by defining it from the perspective of an acquisition or M&A (merger and acquisition) strategy, which I suspect is how most of us would see the potential of systemness. Many have experienced systemness in this way as brand expressions are refreshed via new or evolved names, fresh business cards, a revamped website, new signage on buildings and even an exciting campaign running on television. And the hallmark of these systems? Consistency: one logo, one brand. Everywhere.

But I'm not going to tell it that way. Instead, I'm going to tell you about systemness at UCSF Health. We actually do consider ourselves a health system, and it is important to note that, despite our incredible clinical advances and inspirational patient success stories, UCSF Health is a humble brand. We're relentless about equitable care delivery, and it impacts every facet of our approach. The patient always comes first, even if that means the brand comes second. And although we're faculty-driven, our likeminded partners are a huge part of our health-delivery system.

We didn't expand through acquisitions, and that sets up a totally different dynamic between us and our partners and affiliates—one that complements and supports their expertise and presence in their communities, while respecting their individuality. We work side by side to support them in their communities. We've built a robust infrastructure—call them systems themselves—that we're continually improving upon to connect us seamlessly, so we can connect consumers with more access to the care they need, where they need it. That's our systemness, and it ultimately delivers better experiences and outcomes for the people we serve.

You could say we're flexing the definition of systemness to be more aligned with the way we work; to be more egalitarian and authentic to us. Which isn't necessarily a better way, just a different way. And the long way to say that systemness isn't something we can put in a box. It's not a one size fits all. It's about capturing our culture so that we can build, operationalize and put structure around it while not putting aside authenticity in favor of a growth imperative.

It's about:

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

Talking about systemness and its benefits can help your organization connect with people in real, meaningful ways. Consumer understanding of systemness continues to grow. My challenge to our industry, though, is to think in an even deeper way about the concept and what it means individually. How do your priorities make a unique interpretation of systemness the best fit to your enterprise? How does it reflect who you are and what you value?

Whatever your organization's approach to systemness, we can agree that the topic still requires careful thought. While there was a dip in peoples' orientation to systems at the height of the pandemic, the orientation consumers have toward systems has rebounded. We know that our systems are often best equipped to meet the moment, providing the scale and the expertise to lead the debate on public health in the face of crisis and uncertainty. But the lessons of COVID have also shown us where we excel with systemness and where we still have a lot of work to do. Like you, we're confident we'll get there. It's the *how* that's open to conversation.

Almost every care-delivery channel and service line saw improvement in terms of consumer preference for a system. While COVID shook the role of systems, the pre-COVID sentiment has returned, with systems being universally preferred over independent options.

2020-2023 SYSTEM PREFERENCE (CHANNELS)

	2020	2021	2022	2023	CHANGE 2022-2023
Hospital	71%	61%	62%	65%	+3
Surgical services	70%	61%	62%	64%	+2
Urgent care	54%	44%	43%	45%	+2
Virtual care or telemedicine visit	41%	40%	39%	40%	+1

2020-2023 SYSTEM PREFERENCE (SERVICE LINES)

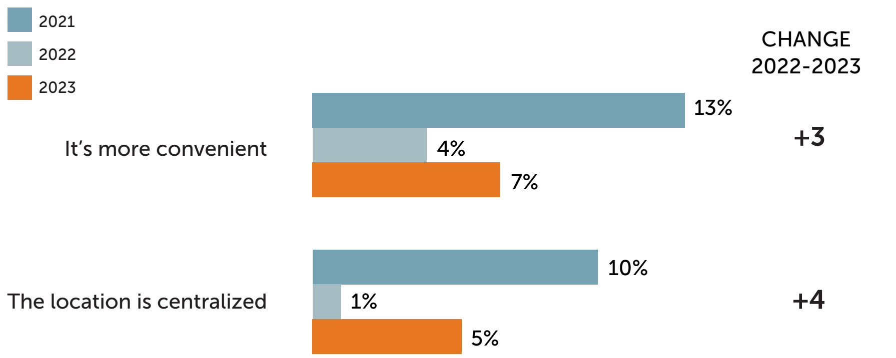
	2020	2021	2022	2023	CHANGE 2022-2023
*Cardiovascular or heart care	*NA*	59%	61%	64%	+3
*Cancer care	*NA*	55%	59%	61%	+2
High-complexity care	64%	54%	57%	59%	+2
Specialty care physician	64%	54%	55%	57%	+3
*Neuroscience	*NA*	49%	52%	54%	+2
Emergency care	62%	53%	54%	54%	–
Primary care/Family physician	63%	54%	52%	54%	+2
*Orthopedics	*NA*	47%	49%	51%	+2
Pediatrics or Teenager care	43%	35%	37%	39%	+2
*Pharmacy	*NA*	32%	30%	32%	+2

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

Where are systems standing out?

Convenience and centralization are two attributes that have rebounded since last year's data collection. But wait. Healthcare brands still need to look at ways to address both the real limitations and the perceived gaps in both of these attributes. We can encourage people to perceive us as more convenient by addressing downtime and setting clear expectations. We can deliver a local and centralized experience—something especially challenging for those of us who have grown by acquisition—by improving our navigation and tech connectivity and continuity across interactions. If you're a system, using these two ideas as filters for your priorities could help you to stay ahead of independent options.

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

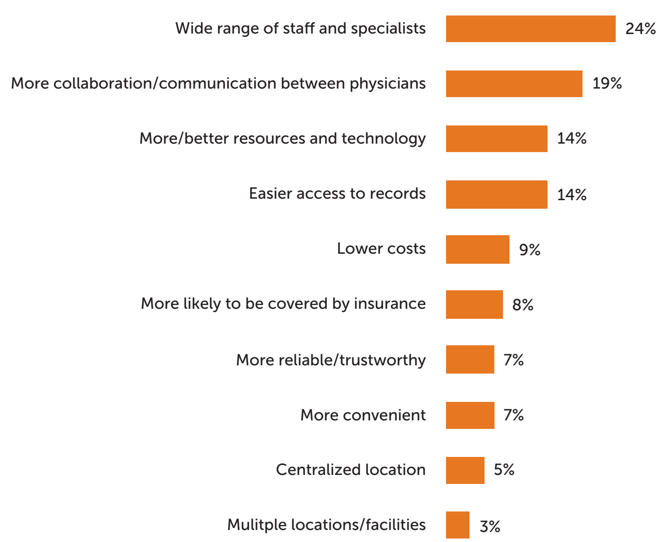


Base All U.S. nationally balanced respondents 2021 (505), 2022 (490), 2023 (500)
QBS4 More and more people today prefer to use healthcare systems* for their healthcare over and above independent facilities. Why do you think this is? In your opinion, what are the benefits of using a healthcare system*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

The systemness toolset

If you're building stories around your own unique blend of systemness characteristics, as Sarah Sanders from UCSF Health suggested, you need to understand how consumers unpack the concept. When people think about systemness, they think about the diversity of your offering and the ability of you and your teams to work more collaboratively. Beyond that, consumers expect to have systemness for medical record accessibility and the potential to lower cost, which could be procedure-based or viewed across the broader total cost of care.

2023 SYSTEMNESS (UNAIDED)—TOP BENEFITS



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

For even more texture, let's look at systemness through the voice of our consumers across the U.S.:

"In my experience [with a] healthcare system, doctors usually know each other and can refer you to trusted physicians, specialists, etc. They seem to be more networked and have a better idea of what is going on."

- Male, 34, Arkansas

"I think healthcare systems are seen as more trustworthy. They have higher standards and better hiring practices. Not to mention with healthcare systems you can sometimes get all of your needs taken care of in one facility. It's far more convenient, and in some cases it's cheaper as well."

-Female, 33, North Carolina

"A healthcare system has access to all of your medical records and has all types of qualified and great doctors. Also, the costs are less with the healthcare systems. They are like a well-oiled machine."

- Male, 72, Washington

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

- Female, 71, Ohio

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

- Male, 53, Massachusetts

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

- Female, 64, Nevada

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Chapter

04

Rewarding loyalty in healthcare

Should I build a loyalty program in my healthcare system?

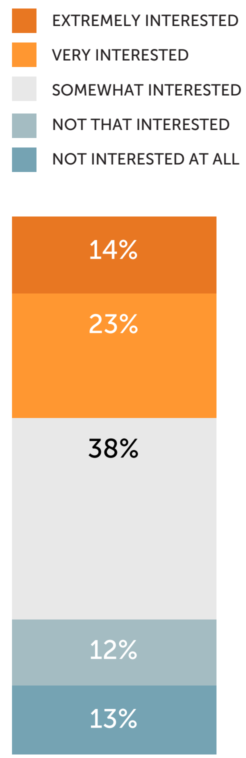
As health, care and wellness brands seek new paths for growth as well as new ways to spark that essential re-engagement with the category, one potential lesson from outside the industry relates to loyalty. Specifically, how do you build loyalty, and how do you sustain it?

We've heard that "being a member has its advantages." Outside of healthcare, it's a routine part of life. We're comfortable with these ideas of status infused into formal loyalty programs and that those on the "inside" get a different type of experience than everyone else. Consumers are not just rewarded with perks and benefits for loyalty; they're also served up more personalized solutions and tailored content that makes reaching goals easier. Long-tenured, established brands like Delta Airlines or Marriott International have been successful with this approach, as well as newer entrants like Starbucks, whose loyalty perks make it challenging for consumers to rationalize getting coffee from anywhere else.

Whether it is through the creation of a formal loyalty program with perks or tiers or whether we just need to better understand what makes people loyal in a healthcare context, we thought it important to dig into the topic broadly as part of this year's Humanizing Brand Experience study.

When it comes to loyalty programs, the key takeaway is polarization. There are some people—specifically over 35% of the U.S. consumer population—who are really interested in loyalty programs in healthcare. And at the other end of the spectrum, another 25% of the U.S. consumer population is not interested. Because strong opinions on this topic land on both ends of the spectrum, it's important to evaluate and understand the "why" behind the responses.

2023 LOYALTY INTEREST



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

For those who are interested in loyalty programs, the benefits appear to revolve around encouragement and the pursuit of a healthier lifestyle.

These individuals, who might already be motivated to make lifestyle changes, now want to be recognized and rewarded for the effort. They want to see their work on "the basics" get applied as a cost-saving mechanism to future procedures or issues that might be more costly or complicated. Interestingly, the benefits of loyalty for these consumers all are intertwined within health, care and wellness.

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

- Female, 46, Texas

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

- Male, 33, California

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

- Male, 33, Idaho

"Yes, that could work for me. I would expect to receive healthcare-related rewards such as gym membership and discounts on health products."

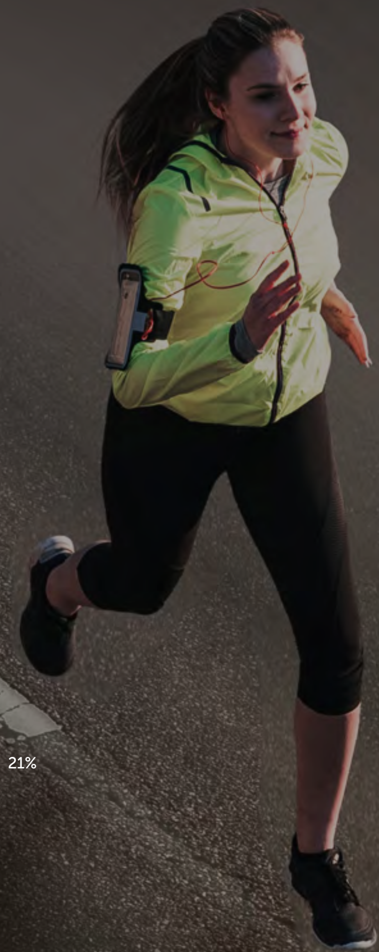
- Female, 63, Texas

"It would reward people for activities to improve their health. It should come in the form of lower-cost health benefits."

- Female, 61, New York

So, you want to build a loyalty program?

If you were to build a loyalty program from scratch, take a look at the benefits that other loyalty-established industries have trained consumers to expect. Topping the list are discounts, savings or other types of spendable "currency" that put real dollars back into the pockets of the members—even if they aren't directly related to healthcare services. Given the rising costs of care across the country, every little bit helps. And a program built around these benefits could work double duty to drive loyalty as well as demonstrate that you're working diligently to address costs in your communities and beyond.



2023 LOYALTY (UNAIDED)—TOP REWARDS AND BENEFITS

Base U.S. nationally balanced respondents 2023 (500)

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

Data Coded verbatim

Those who aren't currently interested in loyalty programs raise a concern about the potential inequity that could result from a change in the relationship between provider and patient. With this in mind, we have to consider whether and how this approach brings more people closer to healthcare rather than distancing them from it.

"No, I don't think a loyalty program around healthcare services would work. Most people either don't have time or funds to get healthcare and then neglect to do so. Having personable, compassionate staff that take time to get to know patients and treat them with care would be a better investment than a loyalty program."

- Female, 38, Florida

"Healthcare should be about the health of the person. The loyalty should be from the doctor to the patient. Not the patient to the doctor."

- Male, 43, Nebraska

"I think loyalty programs in healthcare are quite tacky. It feels like it's a business, a money-making business trying to upsell. Buy two, get one free in healthcare? No."

- Male, 63, Maine

"I don't think this is a good idea. If companies are interested in doing better, they should simply reduce the overall cost of healthcare. It's out of control, and a lot of people cannot afford good healthcare anymore."

- Female, 63, Nebraska

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

The goal for each of us as brand, culture and experience leaders is to cultivate a deeper relationship with our consumers so they never want to go anywhere else. So how do we do it—how do we create loyalty? Freeing ourselves from the formality of a structured program to see what kind of benefits resonate is an option. In fact, the top-performing loyalty brands in healthcare don't actually have traditional rewards programs!

Respondents indicate that free services and functional benefits—like extended hours or a dedicated appointment line—can help build individual loyalty. On another level, partnerships with complementary services like fitness or health food delivery can also help engender deeper loyalty, while enhancing legacy brand equity.

2023 LOYALTY PERKS –TOP 2 BOX

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

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Chapter

05

Proactive pushback and the rise of the Doctor Dodger

The segment least interested in seeing us is also growing fastest

If you thought there was no possible way we could add to the list of pressures that health, care and wellness brands are facing, think again. Because in the face of some of the most significant business and operational challenges to ever confront our industry, we can also confirm that consumer sentiment around avoiding the doctor is at an all-time high.

Delaying care seems to have spiked, with significantly more people avoiding the doctor even when they know they need to visit. **A staggering 17% of consumers in the U.S. now qualify as "Doctor Dodgers" based on our segmentation—up from 11% last year.** This is no longer about category engagement. This is about category avoidance.

Look at some of these shifts in national consumer sentiment year over year. More people are only going to the doctor when they're sick, meaning they're less focused on their wellness. Fewer people are proactive with their health, resulting in a reactionary cycle of catchup for both consumer and provider brands. More people are citing lack of time as the reason for dodging, which reflects the perception and the reality of how challenging it is for people to get through your virtual or physical door. Every single measure, both viewed from the negative side and the positive side of the statement, reflects a growing population less and less inclined to engage with us at a time when we need them more than ever. And those who have chronic conditions and now-emergent health issues they deprioritized in the pandemic need us more than ever too.

2022-2023 CHANGE IN HEALTHCARE ATTITUDES—TOTAL

	2022	2023	△	2023	2022	
I only go to the doctor when I am sick	27%	35%	8	65%	73%	I go to the doctor even when I am well
I am proactive when it comes to managing my health	70%	62%	8	38%	30%	I am reactive when it comes to managing health, only seeking out healthcare when I need it
I avoid going to the doctor, even when I need to	10%	17%	7	83%	90%	I will go to the doctor when I need to
I don't have the time to go to the doctor	15%	22%	7	78%	85%	I can always make time to go to the doctor

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

So, let's unpack the why behind the dodging. Not surprisingly, cost is and has been a major factor for delaying care almost as frequently as it was in pre-pandemic 2020. Our present-day economic volatility for our many consumers across the country only amplifies that. Further, as health, care and wellness leaders are quick to remind their peers across the industry, the delivery system has less control than it would like on the cost to patients. It's an element of the experience that is not fully controlled or controllable.

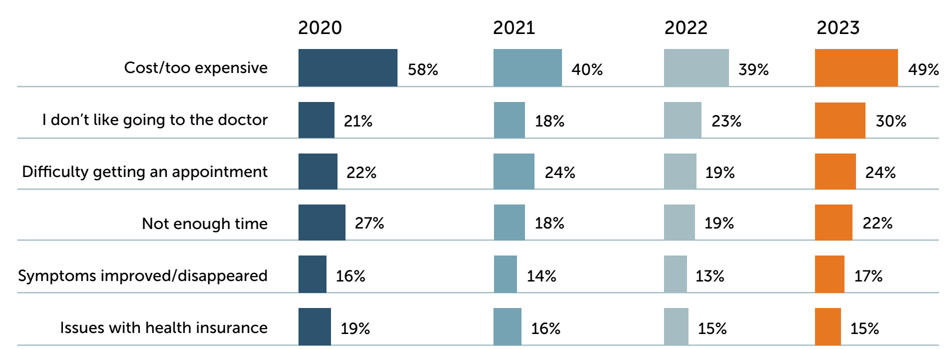
However, the other reasons are experience-related attributes that we 100% have the ability to control: people don't like it, it's difficult to get an appointment and it's too time-consuming.

These are areas where our organizations have the opportunity to change behavior by thinking differently about what and how we deliver.

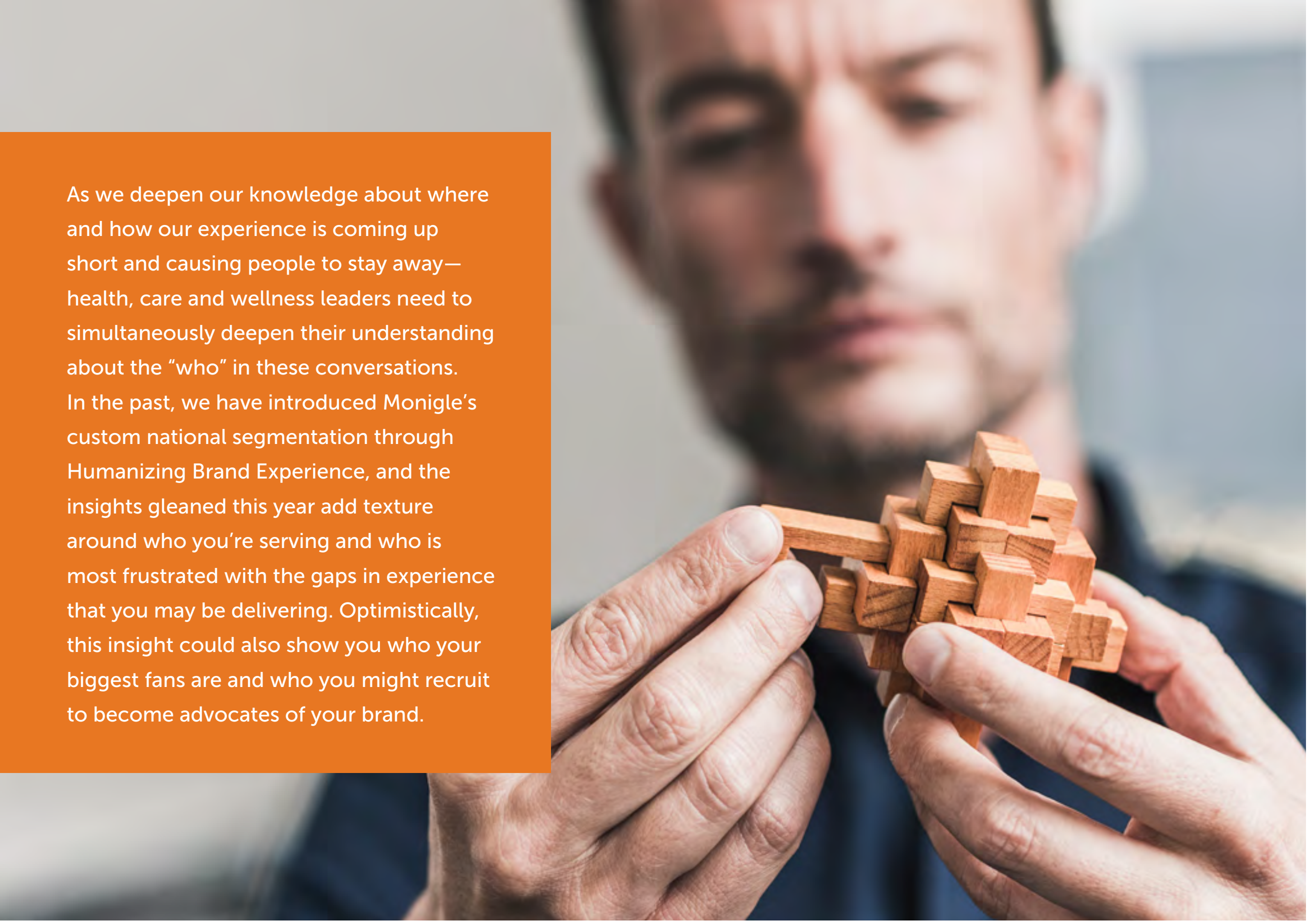
Can you answer why your consumers and your communities don't like going to the doctor? If you don't have real data on which you can act, step one is to simply ask them. You have a huge portfolio of consumer insights at your fingertips to help illuminate the pain points that might be unique to you and your market.

Across your experience, do you know where you're creating the most difficulty in providing appointment options or where you are wasting your consumers' time? Building a journey map of your experience—either at an overall, a service line or a facility level—represents a direct path to defining the pain points that are directly resulting in people delaying care.

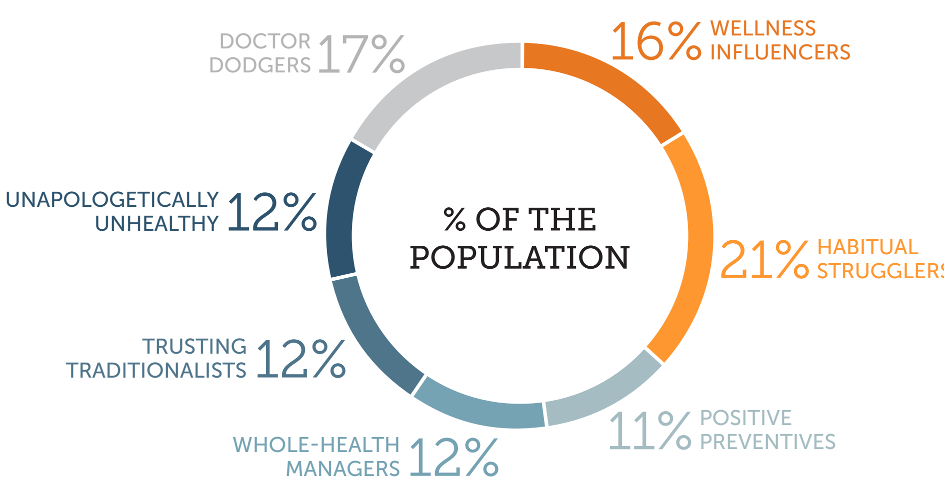
2020-2023 DELAYED CARE REASONS



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



As we deepen our knowledge about where and how our experience is coming up short and causing people to stay away—health, care and wellness leaders need to simultaneously deepen their understanding about the "who" in these conversations. In the past, we have introduced Monigle's custom national segmentation through Humanizing Brand Experience, and the insights gleaned this year add texture around who you're serving and who is most frustrated with the gaps in experience that you may be delivering. Optimistically, this insight could also show you who your biggest fans are and who you might recruit to become advocates of your brand.



Methodology refresh

As opposed to traditional segmentations in the category, our approach segments people based on their relationship with healthcare, not biometrics or demographics. Demographics, as well as a battery of other attributes, are then used to describe each of the segments to bring them to life. This also helps to create a bridge into existing CRM systems so that segmentation can become a part of your microtargeting strategies.

WELLNESS INFLUENCERS

16% OF THE POPULATION

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

HABITUAL STRUGGLERS

21% OF THE POPULATION

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

POSITIVE PREVENTIVES

11% OF THE POPULATION

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

WHOLE-HEALTH MANAGERS

12% OF THE POPULATION

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

TRUSTING TRADITIONALISTS

12% OF THE POPULATION

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

UNAPOLOGETICALLY UNHEALTHY

12% OF THE POPULATION

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

DOCTOR DODGERS

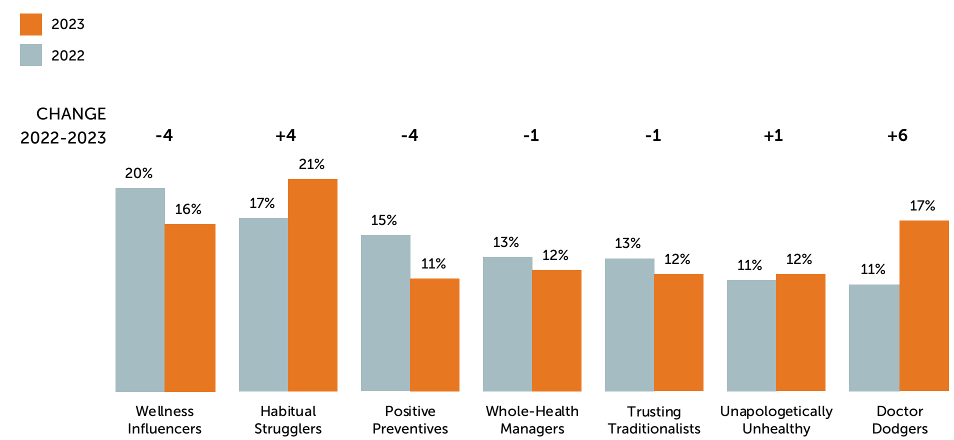
17% OF THE POPULATION

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

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

With the increasing orientation that consumers have to avoiding healthcare, it's not surprising to find Doctor Dodgers to be the fastest-growing segment. Interestingly, we're also seeing an increase in the number of people who classify as Habitual Strugglers, which reflects the deepening health crisis people create by avoiding the care they need. In contrast, our more engaged segments—Wellness Influencers and Positive Preventives—have declined year over year. This is not the news healthcare wants to hear, as it is incrementally more challenging to bring less engaged people closer to our brands and experiences, but it does match the declining engagement trends discussed above.

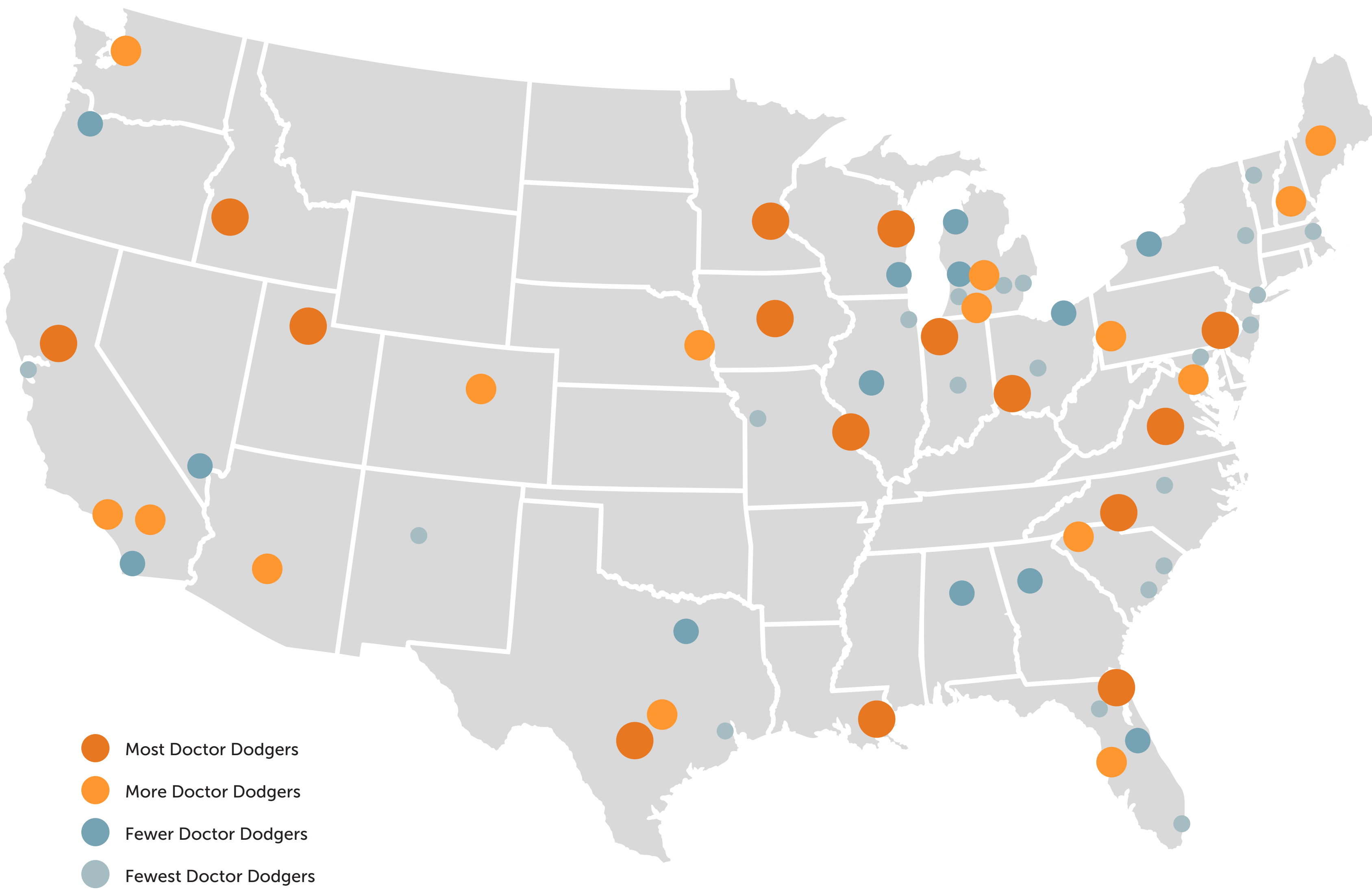
2022-2023 SEGMENT SIZES



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

Doctor Dodgers are everywhere

No market is immune to the presence of this avoidant segment of the U.S. population. We see the Doctor Dodger across the country, which should influence how you think about your population. Do you know what could influence or impact your Doctor Dodgers? A first step to understand them better might be to know where they're coming from.



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

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

^Market formerly referred to as South Carolina

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Chapter

06

Staffing shortages: a consumer perspective

Today, workforce challenges are unprecedented

Retaining people at our organizations and even keeping them in the industry have proven to be more challenging than ever. Recruitment is ultracompetitive, with fewer and fewer experts entering some areas of specialization. We know that these are big challenges for healthcare leaders, but what impact does it have on consumers and their view of our brands, our cultures and the experiences we create?

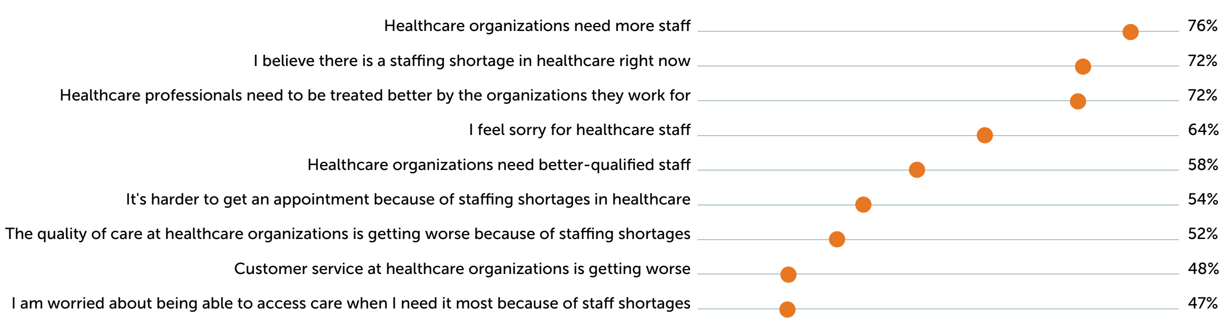
Take a look at the national results. They're staggering:

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

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

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

2023 STAFFING IMPACT—GENERAL—TOP 2 BOX



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

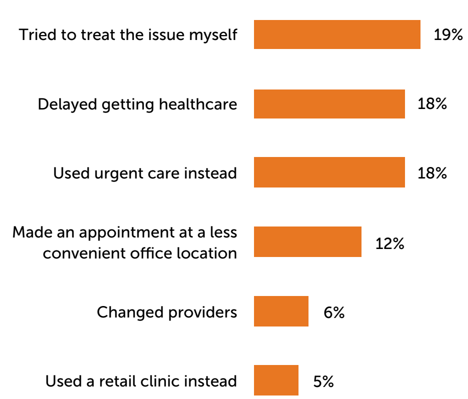
This is a frighteningly large proportion of our population.

And they all have a strong opinion about the structure and behavior of our industry. Think about it this way: in how many other industries do you think consumers would reach such strong conclusions about staffing shortages and employer behavior? Maybe technology, given the recent news about layoffs at Google and Meta among many others. But even with those examples, the changes that are happening don't result in disruptions in service. And that's where the rubber meets the road in the minds of our consumer audiences.

Taking a deeper dive into the data that we collected, we see that 54% of U.S. consumers believe that it's harder to get an appointment because of staffing shortages, while 52% believe the quality of care is worsening because of them. Our point is not to belabor what you already know, feel and deal with on a daily basis. Instead, the point to note here is that we're not hiding our issues from anyone. If consumers choosing to re-engage with healthcare more frequently is part of our plan for recovery, how can we start to break down the perceived—and the very real—sentiments around how staffing issues are impacting us?

Another interesting aspect to consider is how these consumer perceptions are impacting behavior. When we asked people about actions they've taken in response to staffing shortages, 19% had put it upon themselves to solve their own problems via self-care, while 18% simply delayed care altogether. That's approximately a quarter of U.S. consumers who chose an alternative to engaging with healthcare delivery brands due to the issues we face across our workforce. Now imagine the outlook on our business had we captured even half of that volume.

2023 STAFFING IMPACT—ACTIONS



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

When hearing stories from consumers about how staffing shortages have impacted them and their families, two commonly referenced challenges come up—neither of which is new to you. The first replays all of the difficulties around getting an appointment, which could reflect an organization not having enough people to answer calls, the lack of a scheduling system or even some kind of misalignment across practices or providers. The second relates to long wait times, which reflects a lack of providers to meet growing demand. The point here is that consumers are noticing, and their frustration is growing. As we think about ways to address growth and meet demand, we will also have to work that much harder to help consumers move past these perceptions around staffing and how it's impacting the quality of our care, our service and our experiences.

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

- Female, 57, California

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

- Male. 70, Arizona

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

- Male, 75, North Carolina

"I believe my primary care physician double books to meet the demand and wants to spend 10 minutes or less during routine healthcare visits. I feel rushed and forget about the questions I have. It also takes months to get an appointment."

- Male, 31, North Carolina

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

To be successful, you need greater definition of the employee side of brand and experience. So often brand and experience have been built predominantly based on consumer needs. But your employees are just as critical to your brand and experience strategy and execution. The more successful brands have likely done some combination of the following to define the workforce side of their brand:

1. Clearly define an employer brand or employee value proposition that clarifies the relationship between organization and individual while demonstrating why people should work there as opposed to at an alternative.
2. Map the culture of the organization through research to understand what people want from the enterprise. Culture mapping enables better, more informed decisions by leaders as it demonstrates the culture of the organization as well as the potential gaps.
3. Define the entire employee experience—from recruitments, steps and onboarding to retention and growth. This is not just about what you want it to be but what you are actually doing and what's working versus what's not. Sometimes, you'll find steps in the process that are, at best, disconnected and, at worst, in stark conflict.

TOP 10 HEALTHCARE BRANDS - STAFFING

Rank	Brand		
1	University of Miami Health System	UHealth UNIVERSITY OF MIAMI HEALTH SYSTEM	71%
2	Mount Sinai Medical Center	Mount Sinai MEDICAL CENTER	69%
3	Emory Healthcare	EMORY HEALTHCARE	69%
4	Baptist Health South Florida	Baptist Health	69%
5	Valley Health System	Valley Health System	68%
6	Cedars-Sinai	Cedars Sinai	67%
7	Stanford Health Care	Stanford HEALTH CARE	67%
8	UChicago Medicine	AT THE FOREFRONT UChicago Medicine	66%
9	OhioHealth	OhioHealth	66%
10	Ochsner Health	OchsnerHealth	66%

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

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Chapter

07

Self-care is the new healthcare

Interest continues to grow around how people can solve their own problems, and our experiences should play a role

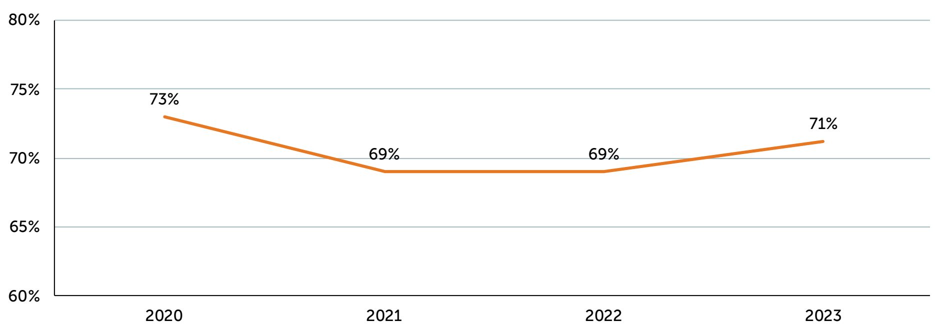
Welcome to our 7th inning stretch, reader. One of the few bright spots of overall engagement in health, care and wellness has been the continued recovery of the proactivity attribute, whereby people are doing their own research on symptoms and potential treatments. We see that 71% of consumers nationwide are taking some type of proactive action beyond research via Dr. Google. In fact, we're quickly seeing this morph into a broader behavior—dare we say desire—for taking health, care and wellness issues into their own hands, without the active participation of a delivery brand or provider. But ask yourself: Is this environment a product of our own creation? Are people so frustrated that they are now willing to do it all themselves?

42%
of consumers across the country now claim to practice "self-care," which means managing their own health, as well as self-diagnosing.

We see this in the pathways that consumers are pursuing for the care that they need. Originally, we were monitoring channel usage throughout the pandemic because we wanted to better understand and anticipate the impacts of virtual care interactions in place of in person. Self-care is becoming a critical channel that demands our attention as brand and experience leaders. Self-care is a broad set of activities that should encourage us, as leaders, to think more broadly both about our offerings but also about how those offerings fit into the quickly changing lifestyles of our consumers' lives.

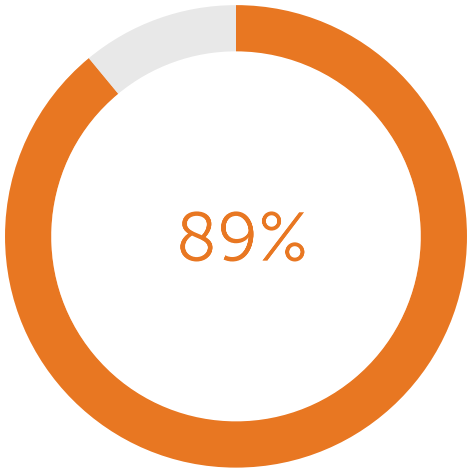
2020-2023 HEALTHCARE ENGAGEMENT—PROACTIVITY

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



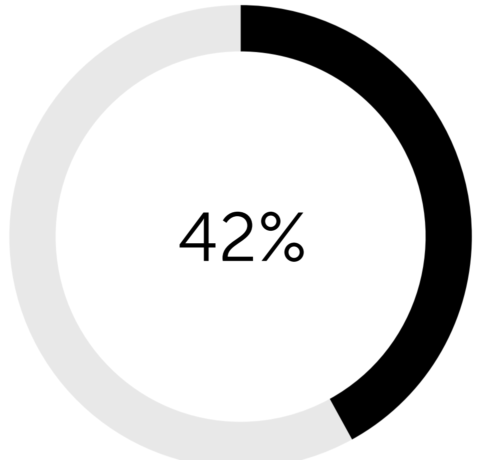
Base All U.S. nationally balanced respondents 2020 (3035), 2021 (3000), 2022 (3183), 2023 (3000)
QE1 First, we'd like to better understand how you think and feel about healthcare. Please select how much you agree or disagree with the statement: I often do my own research on my symptoms and/or treatments.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

2023 CHANNEL USAGE



IN-PERSON CARE

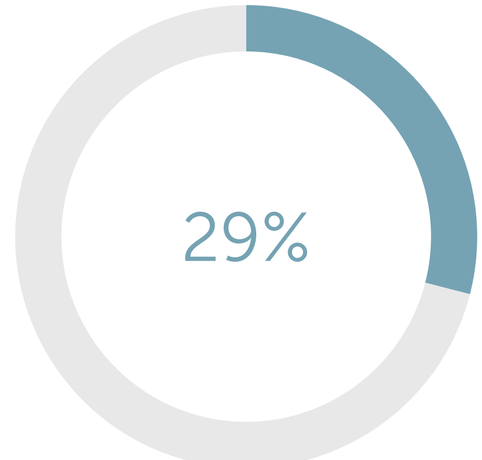
At a doctor's office/hospital/medical facility.



SELF-CARE

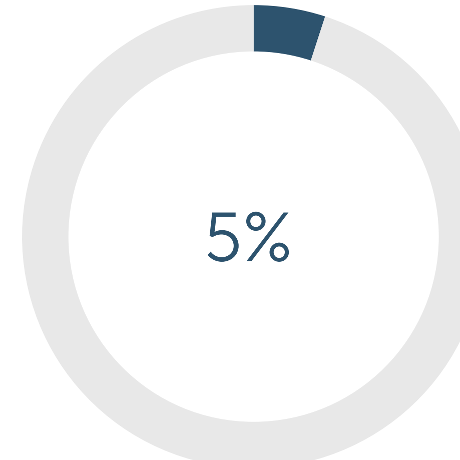
When you do your own research online to self-diagnose and manage your health.

(This definition of self-care is focused on the channel. Think of this as the pathway to care. The definition presented to consumers illustrates the "how" associated with engaging with healthcare brands. We see self-care as a much bigger idea, and the channel preference here indicates how much energy there is in leveraging a broad ecosystem of health, care and wellness needs).



VIRTUAL CARE

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

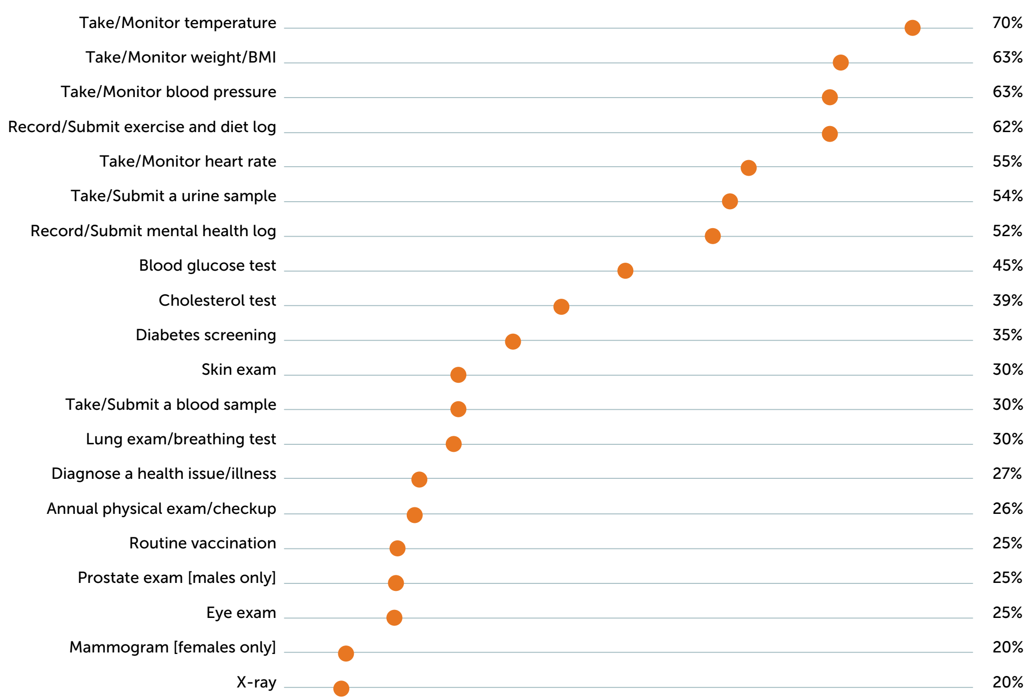


IN-HOME CARE

When a doctor/healthcare professional comes to your home.

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

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



"I would be comfortable using devices at home that I can use to monitor my vital signs. I would be willing to use test kits that I could administer myself at home."

- Female, 64, Michigan

"At-home kits are very useful especially for people who cannot get out of the house. I wish more things were able to be tested for/ done at home."

- Male, 21, North Carolina

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

This orientation presents interesting and potentially new growth opportunities at the blurring edges of health, care and wellness. Where should our brands and experiences be interacting with the self-care side for our consumers? Well, when we explored the kinds of behaviors people were most interested in, a surprising list of activities that used to be relegated to the doctor's office rose to the top. For starters, consumers indicated a high willingness to monitor weight, blood pressure, heart rate and temperature.

They're willing to log or document activities related to nutrition and exercise for themselves. There are other instances when people are even willing to collect a urine sample as part of their regimen. This is a clear indicator of the blurring between traditional in-office activities and what can be done at home, but the question is whether our delivery operation is capable of adapting. Whatever is happening, this signals that the walls between traditional healthcare and self-service have clearly come down—both literally and figuratively.

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

- Male, 30, Indiana

"I would be comfortable giving my provider basic health information I could collect myself. Such as blood pressure, sleep tracking, exercise, etc."

- Female, 52, Washington

"This is a great question! My first thought is on Blood Testing from home. Blood tells the medical professionals plenty of information about the biological system. It would be nice to do this simply, from the comfort of my own home. It seems to be a complex and expensive process at the moment. Why not simply place the lab into a small device that can take small blood samples and give instant results. A small device that can fit in your pants pocket. This would be ideal for the future generations of the World!"

- Female, 36, Colorado

The ChatGPT impact on self-care behaviors

Let's take self-care behaviors a step further. What if you had the collective wisdom of tens of thousands of clinicians who have published on a topic, the collective wisdom of all healthcare brands around the world and the ability to access the information immediately? Enter ChatGPT. The continued interest in self-care behaviors among consumers seems rife with opportunity for people to seek out information from aggregated sources instead of turning to traditional experts in the form of healthcare clinicians. Will the insight be perfect—or even completely accurate—all of the time? Of course not. But think about the insights provided with a simple question that is likely on the minds of millions of American people…

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

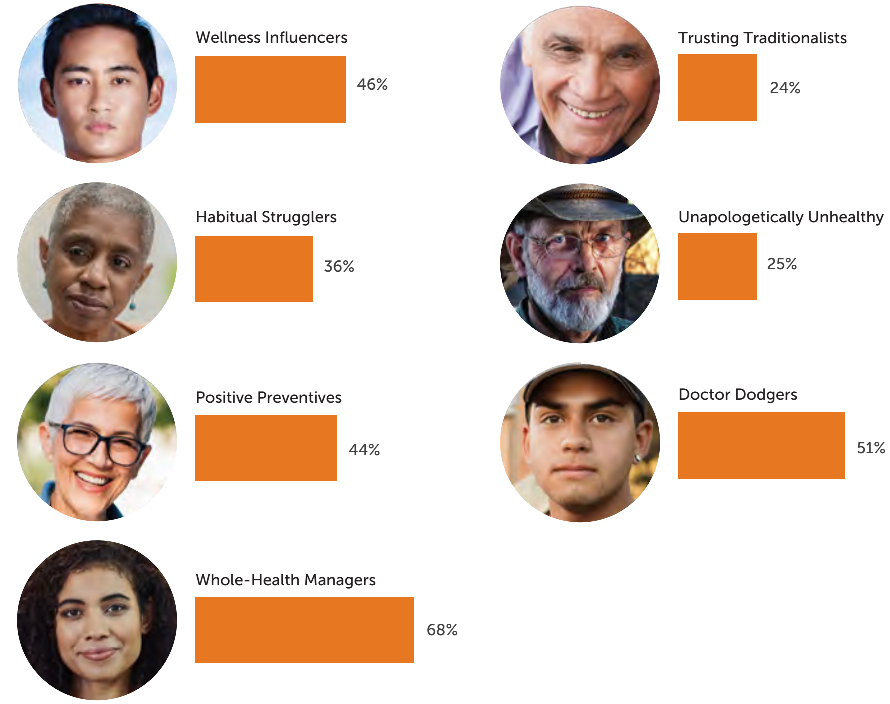
High blood pressure, also known as hypertension, is a common condition that affects many people. If left uncontrolled, it can increase your risk of heart attack, stroke and other serious health problems. Fortunately, there are several things you can do to manage your blood pressure at home. Here are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

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

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

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

2023 PREFERENCE FOR SELF-CARE CHANNEL BY SEGMENT



Self-care doesn't serve every segment equally

It's clear that some of our segments are more naturally oriented to self-care than others. Whole-Health Managers in particular are turning to self-care as a channel more than any other segment. What does this mean for you? Lean into it—understanding that self-care is more common among some mindsets could impact how you communicate with them and if/where you attempt to engage with them when they are thinking about their needs.

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

Chapter

08

Evolving the language of healthcare

Lessons in content and control from Virtua Health

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

It was a discussion about recent research around the language of our new brand rollout and how we talk about people and conditions they face. A day full of data and technology and a section on how we communicate with newly diagnosed cancer patients. As the day moved along, it became clear that when talking about cancer, the tropes of war shaped every story. More surprisingly, though, it seemed like everyone was OK with that strategy. That gearing up for "the battle for their lives" and becoming a "warrior" to "fight and beat the odds" was the right kind of language to endear these new patients in some meaningful way.

But does it? Think for a second. If you were facing a cancer diagnosis, would the first thing you'd want to feel is that you're being drafted into military service?

There's a better way. That discussion started us down a path at Virtua Health to evolve our language of health, care and wellness from the inside out. To make the conscious shift from a talking organization to a listening one. To peel back the layers of medical jargon, come out from behind acronyms and communicate with purpose and a humanness that signals to everyone who crosses paths with our brand that we're here to be of service, we're here to add value and we're here for good.

Since then, we haven't looked back. Everything we do, every conversation we have, every message we put forth is intentional and meant to connect others with our mission of humanizing healthcare. It's changed how we work together as marketers and brand stewards and evolved how we segment and test and learn, how we arrive at decisions, how we evaluate media partnerships and who we look to as advocates and ambassadors for our brand.

And while we don't have a crystal ball to see into the future, we do know that today is as good a day as any for you to start your own journey. Consider the following as fieldnotes from ours:

Know who you are and be relentless about it.

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

Be open to the freedom of where communication will take you.

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

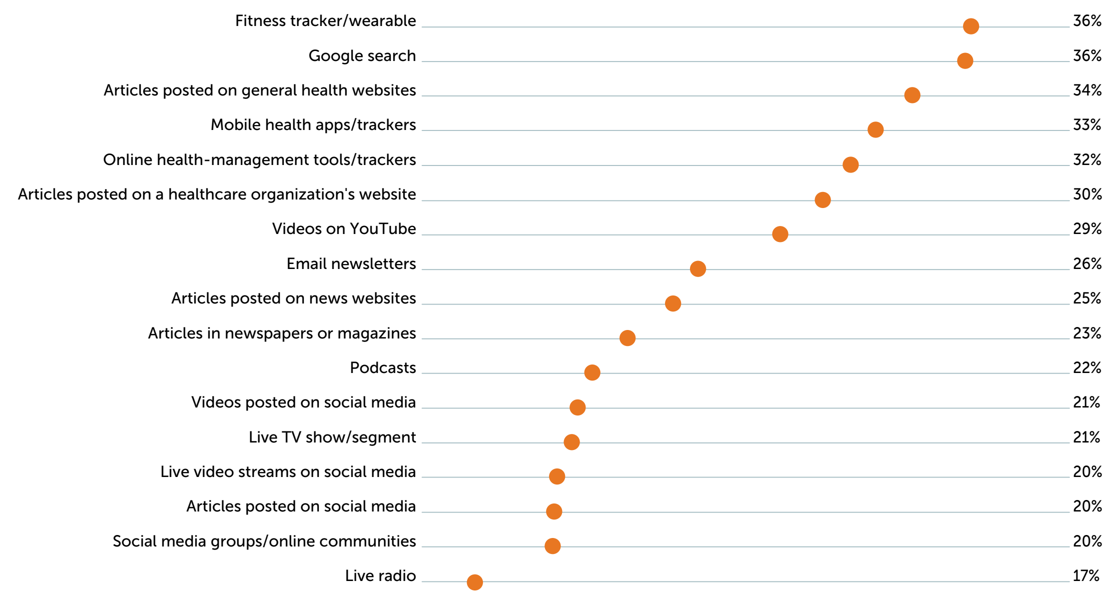
Apply your brand everywhere.

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

All of this is to say we have an incredible opportunity as brand, marketing and experience leaders to do more to influence and elevate our brands to their full potential. When we're all speaking the same meaningful language, anything is possible.

The channels people are most interested in receiving information from appear to give people some level of control over their health, care and wellness. This includes self-service content formats like fitness trackers, Google search and articles posted on general health sites. Your content strategy should consider this level of empowerment as you plan what you put out into the world.

2023 CONTENT FORMAT—TOP 2 BOX



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

If the goal is control, how can our content be there for consumers when the time comes?

Inspired by our conversations with the team at Virtua Health, here's a checklist of sorts for aligning your content to the growing desire for control among consumers.

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

2023 CONTENT TYPE—TOP 2 BOX

People appear to want more wellness content over sickness content, including a preference for nutritional advice and healthy food recipes/resources, health checklists based on age/gender and online self-care tools and resources.

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

The potential in precision content

For far too long, we engaged consumers using the same message, channel and mindset. As our tools and technologies have evolved, it's more important than ever to be more precise in our approach to engaging different subgroups within our markets. Your custom segmentation should be guiding how and where you message your audiences. *Don't have a custom segmentation?* It's no longer cost-prohibitive to build one, and you can even include your own data as well as typing tools, making it easier to classify new people into the technology stack that you have constructed. If a custom segmentation is not in your plan for this year, use the one provided here; the Humanizing Brand Experience segmentation provides attitudinal and behavioral information to enable you to become more impactful in your work.

2023 CONTENT FORMAT—EXPECTANCY ANALYSIS BY SEGMENT

	Wellness Influencers	Habitual Strugglers	Positive Preventives	Whole-Health Managers	Trusting Traditionalists	Unapologetically Unhealthy	Doctor Dodgers
Fitness tracker/wearable	3	-4	5	1	1	-2	-2
Google search	-8	-2	4	0	-2	5	-1
Articles posted on general health websites	-6	-5	12	2	1	2	-8
Mobile health apps/trackers	6	-1	-1	1	-2	-1	1
Online health management tools/trackers	5	0	-1	2	-1	-1	-1
Articles posted on a healthcare organization's website	-3	-4	8	-2	0	3	-5
Videos on YouTube	-1	-2	1	1	-2	1	1
Email newsletters	-7	-2	3	-3	7	3	-6
Articles posted on news websites	-1	-1	3	0	3	-1	-4
Articles in newspapers or magazines	-5	0	2	-2	3	1	-2
Podcasts	1	0	-1	2	-1	-1	2
Videos posted on social media	3	2	-4	3	-1	0	2
Live TV show/segment	0	1	-2	-4	2	1	1
Live video streams on social media	4	1	-4	1	-2	1	4
Articles posted on social media	2	3	-2	1	0	-2	3
Social media groups/online communities	2	5	-2	0	-2	-2	6
Live radio	5	4	-3	-2	0	0	4

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

Here's how to interpret the expectancy analysis brought to life in the *2023 Content Format–Expectancy Analysis by Segment* chart above using that segmentation.

- Wellness Influencers want content that connects to their trackers/apps.
- Positive Preventives want health-related articles to read on your website.
- Trusting Traditionalists want that email newsletter.
- Doctor Dodgers rely more on social media content, including videos.
- Whole-Health Managers want holistic health content and nutritional/fitness advice that focuses on keeping them well.

2023 CONTENT TYPE—EXPECTANCY ANALYSIS BY SEGMENT

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

Base All U.S. nationally balanced respondents 2023 Wellness Influencers (492), Habitual Strugglers (625), Positive Preventives (331), Whole-Health Managers (357), Trusting Traditionalists (346), Unapologetically Unhealthy (347), Doctor Dodgers (502)

QCO2 How appealing to you are the following health and wellness resources?

Data Expectancy score based on Top 2 Box

Here's how to interpret the expectancy analysis brought to life in the *2023 Content Type–Expectancy Analysis by Segment* chart above using that segmentation.

- Wellness Influencers prefer content about fitness and exercise programs and resources.
- Whole-Health Managers meaningfully prioritize holistic health advice and wellness information.
- Doctor Dodgers are seeking self-care tools and resources in order to avoid a visit to a health, care or wellness brand.
- Unapologetically Unhealthy prefer a live Q&A style content approach.
- Habitual Strugglers want information on clinical trials and research.

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Chapter

09

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

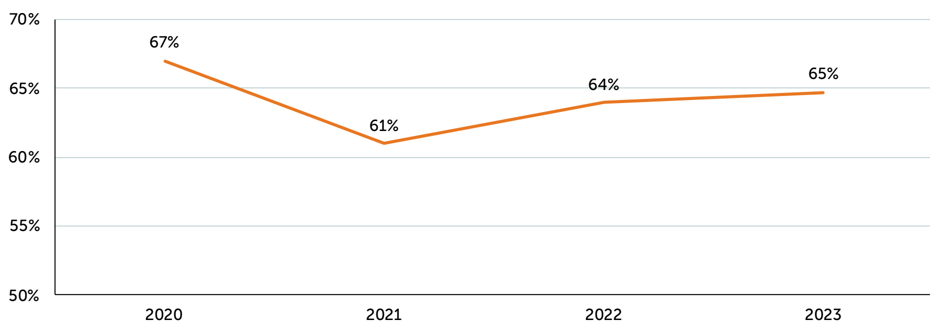
The same pain points keep coming back to haunt us. Healthcare is not easy, convenient or accessible. But in that problem, healthcare organizations are finding solutions—forging new paths for revenue and shifting the dynamic around price sensitivity to an opportunity to present "premium care" as a way to grow. While many engagement drivers have remained stagnant or trended down, the one attribute that has experienced a subtle uptick is symbolic/financial value, where 65% of the population is willing to pay more to get the best healthcare possible. Qualitatively speaking, consumers want healthcare experiences—be it through providers or facilities—that make engagement easier, more efficient and more impactful to their lives. So, the question is: How can brands seize this opportunity to add value?

Unpacking where consumers would spend their dollars

Let's start at the beginning to get a better understanding of what kind of care people will consider paying more for. More than 40% of U.S. consumers agree that advanced diagnostic testing as well as a proactive approach to staving off future chronic issues are worth the extra cost.

2020-2023 HEALTHCARE ENGAGEMENT— SYMBOLIC (FINANCIAL) VALUE

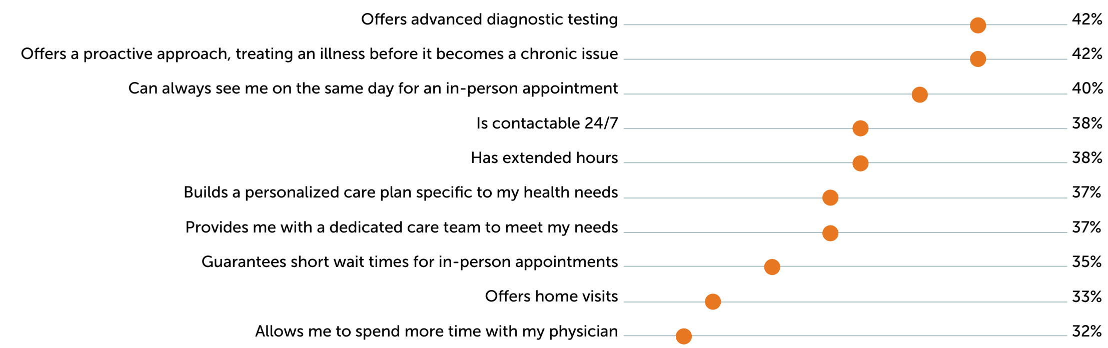
"I think it is worth the extra cost to go to the best healthcare provider or facility."



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

Now here's where things get really interesting. Taking a deeper dive, we find that people are most willing to pay for same-day service, 24/7 availability and extended hours. Short wait times and at-home visits aren't far behind. What that tells us is that one third of U.S. consumers are proactively willing to pay a premium for us to address three of the most common issues that we as an industry have not yet fixed!

2023 WILLINGNESS TO SPEND MORE—TOP 2 BOX

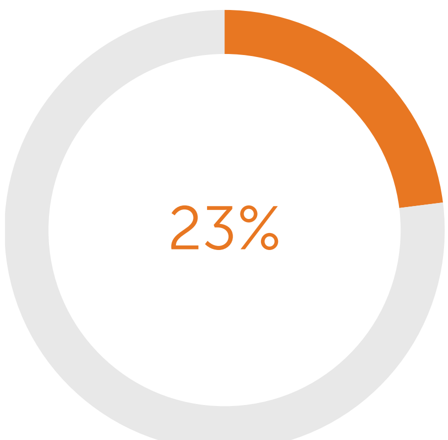


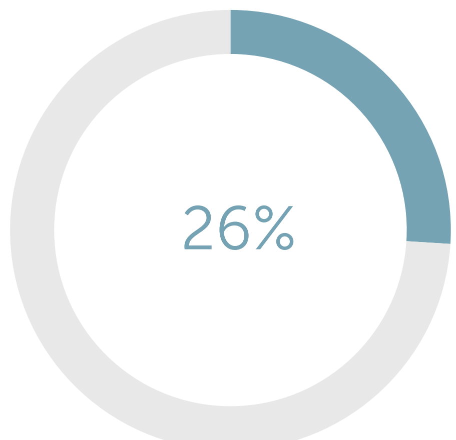
Base All U.S. nationally balanced respondents 2023 (3000)
QP2 How willing are you to pay more to receive the following benefits from a healthcare organization?
Data Top 2 Box Scores

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

Having consumers willingly pick up the cost to solve healthcare's ongoing challenges? Sounds almost too good to be true. So why hasn't it gained more traction? Depends on the segment you're talking to. With concierge offerings now available from both established and start-up organizations and the direct primary care business growing by leaps and bounds (thanks to employers assuming their share of healthcare cost)—we're seeing consumer interest in both of these models grow.

2023 PREMIUM HEALTHCARE MODELS





CONCIERGE MEDICINE

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

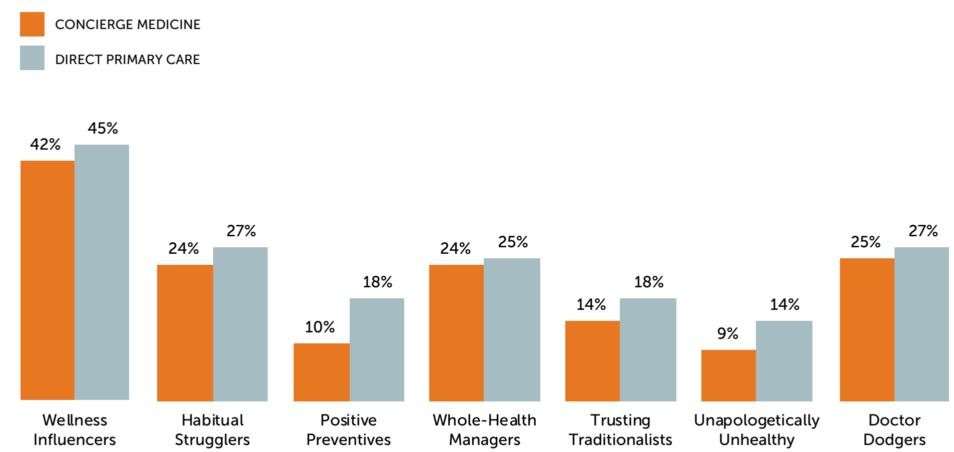
DIRECT PRIMARY CARE

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

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

But go deeper to talk to different segments about either approach, and you'll find different perspectives, which further elevates the importance of segmenting your populations for understanding. As communicators, we can no longer try to "sell" these new offers to everyone. Instead, we have to align our offerings with the specific needs and expectations of the subgroups across our communities. As an example, Wellness Influencers in particular are interested in these offerings, but Positive Preventives, Trusting Traditionalists and those in the Unapologetically Unhealthy segment don't share the same sentiment.

2023 PREMIUM HEALTHCARE MODELS—TOP 2 BOX INTEREST BY SEGMENT



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

Which leads to a new challenge: When healthcare leaders connect premium offerings to their brand, they need to tread very carefully around how and who they target as well as the content they share. Who will take on that delicate responsibility, with an already mounting list of to-dos?

And then there's the why of it all. When asked why someone would consider paying a premium for a more bespoke experience, we heard two very different stories. For those interested, greater ease and convenience than they experience now topped the list. But for those who weren't interested, it was more about concern. Concern around the cost as well as a feeling that all of this "extra" might not be something for them.

Either way, there's a tension we need to reconcile. By going down this path we're asking people to pay for what is broken in our industry. And the truth is that they shouldn't have to. Having a "best" experience or even a good one shouldn't be tied to paying more than others—it should just be. And what about the risks associated with premiumization? Is your brand willing to take that on, especially now, amid the discord surrounding a widening health equity gap between haves and have-nots? Is your brand prepared to take on the risk of adding inequity to an already complicated ecosystem?

So many questions around this topic, but really, only one simple conclusion. Instead of having a select few pay a premium to get the basics right for them alone, let's work toward getting the basics right for everyone. Small ways, big ways, any way is better than no way. And then let's talk about it and share our learnings so we can all grow long term—with our focus on care and our reputation intact.

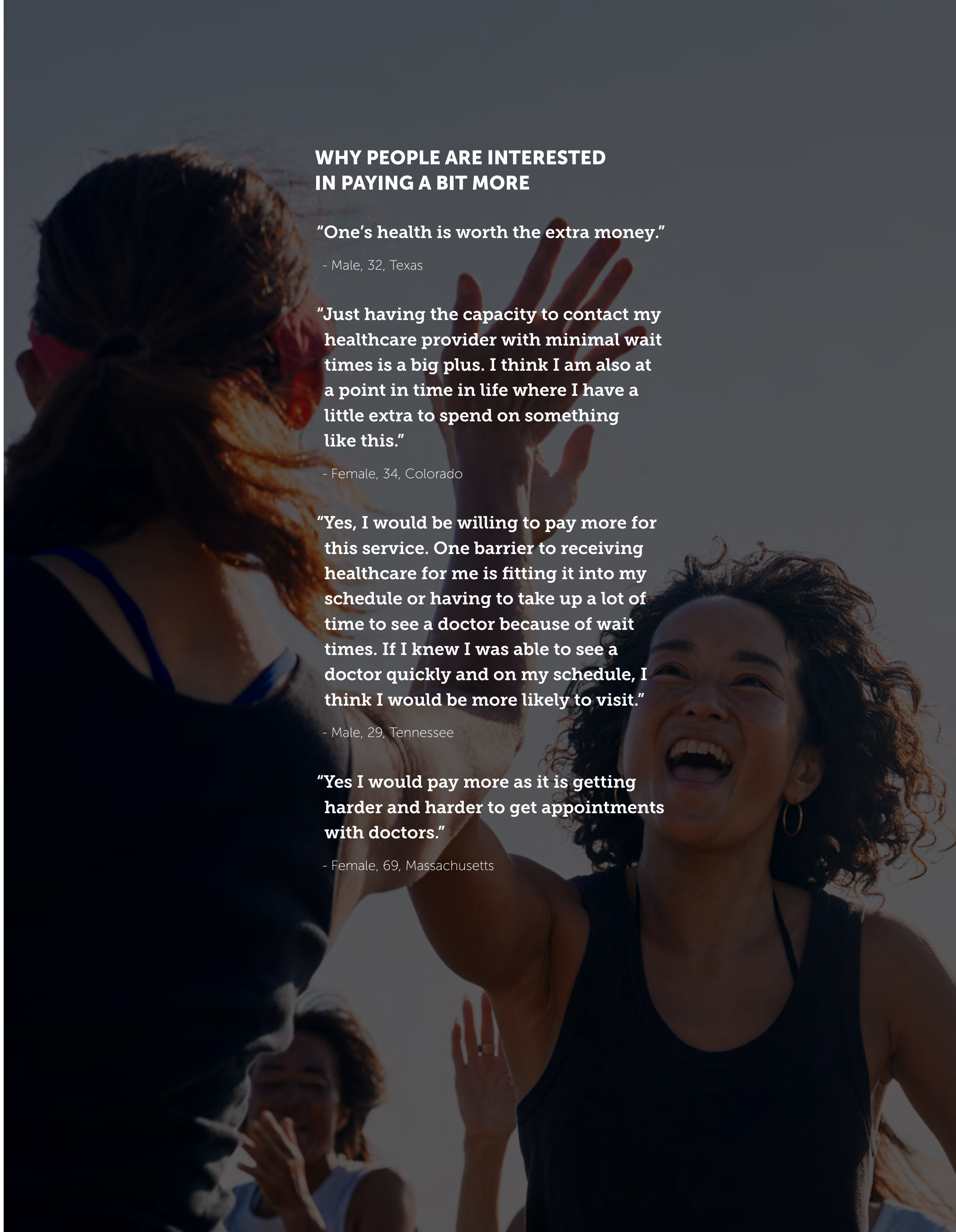
WHY PEOPLE ARE UNINTERESTED IN PAYING A BIT MORE

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

- Female, 54, New Mexico

"If a healthcare service like this becomes the mainstream, a large part of the population - that cannot afford healthcare as it is - will be severely negatively affected."

- Female, 25, New York



WHY PEOPLE ARE INTERESTED IN PAYING A BIT MORE

"One's health is worth the extra money."

- Male, 32, Texas

"Just having the capacity to contact my healthcare provider with minimal wait times is a big plus. I think I am also at a point in time in life where I have a little extra to spend on something like this."

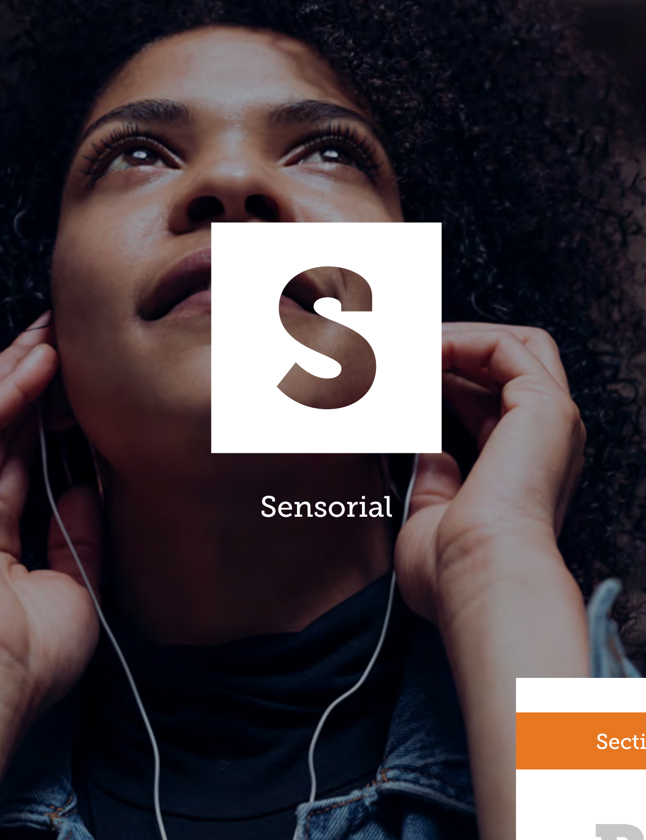
- Female, 34, Colorado

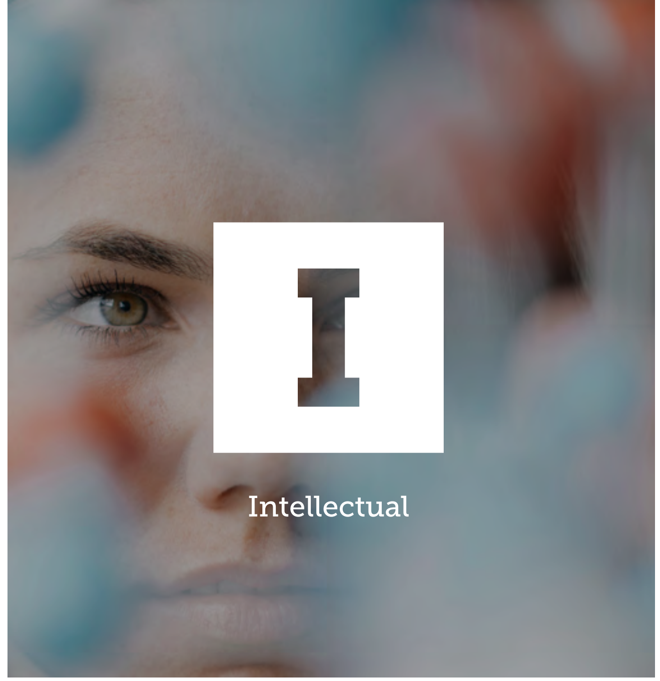
"Yes, I would be willing to pay more for this service. One barrier to receiving healthcare for me is fitting it into my schedule or having to take up a lot of time to see a doctor because of wait times. If I knew I was able to see a doctor quickly and on my schedule, I think I would be more likely to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

- Male, 29, Tennessee

"Yes I would pay more as it is getting harder and harder to get appointments with doctors."

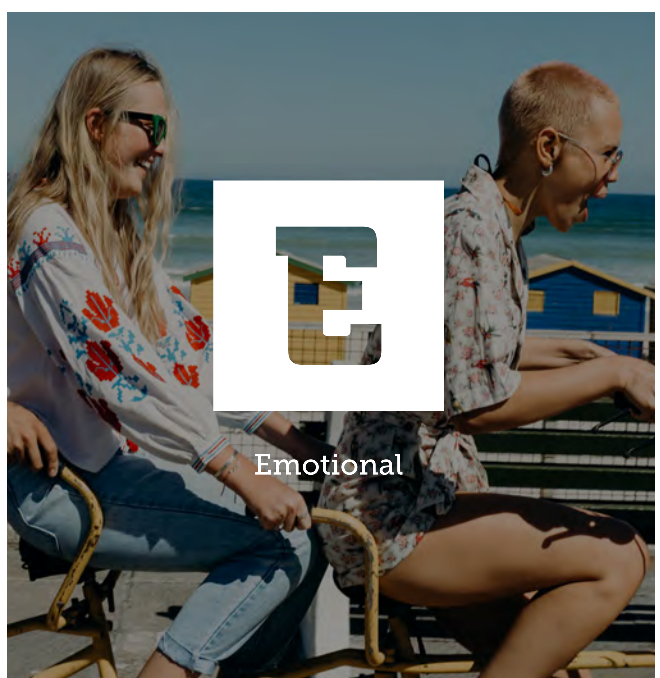
- Female, 69, Massachusetts





Section:

BRAND FRAMEWORK



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

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

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

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

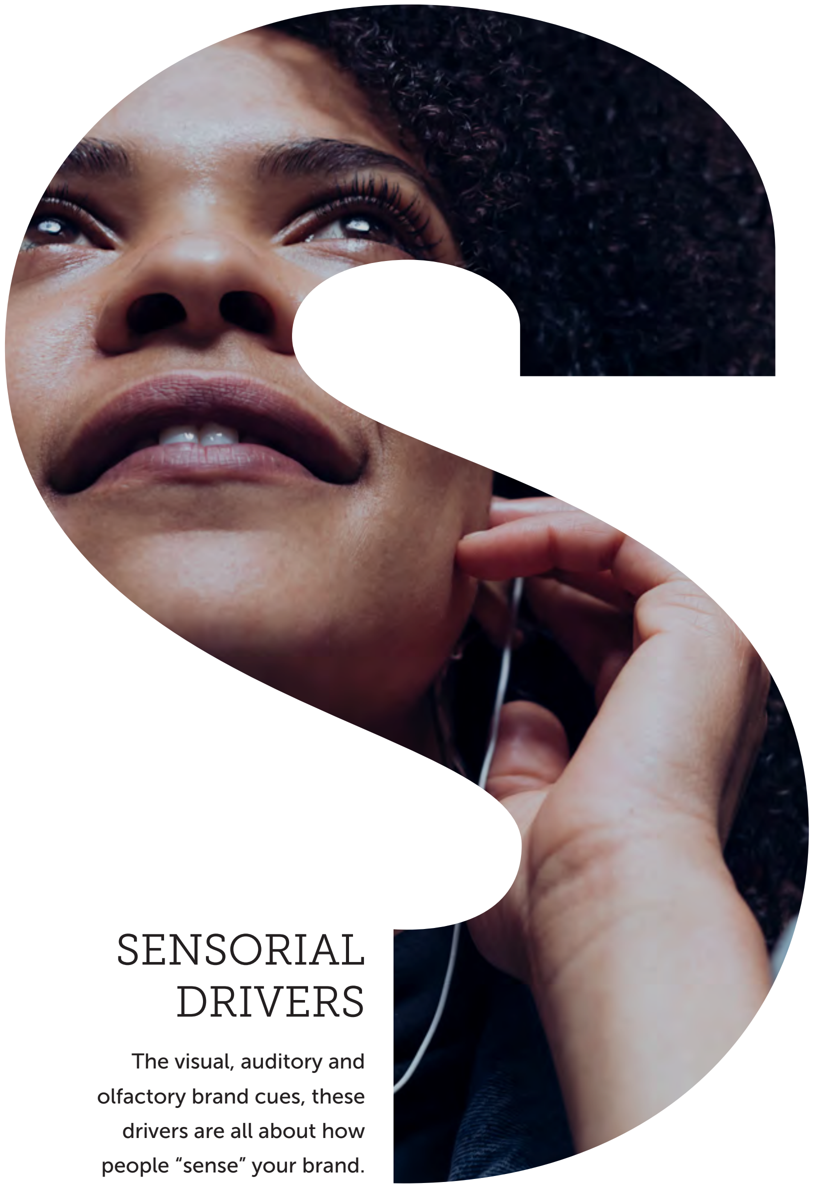
A note on this year's model

This year, we continued our ongoing evaluation of the attributes that are top of mind for consumers. As you will see in the results on the following pages, there is little movement among the attributes at the top.

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

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

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



SENSORIAL DRIVERS

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

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

IMPORTANCE

Derived importance score and rank based on Shapley Value Regression

INTELLECTUAL DRIVERS

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

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

Derived importance score and rank based on Shapley Value Regression

EMOTIONAL DRIVERS

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

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

Derived importance score and rank based on Shapley Value Regression

BEHAVIORAL DRIVERS

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

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

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

Section:

BRAND RANKINGS

2023 Humanizing Brand Experience Rankings

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

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

*Multiple markets NET score

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

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

Brand rankings

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

*Multiple markets NET score

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

*Multiple markets NET score

Brand rankings

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

*Multiple markets NET score

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

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

Brand rankings

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

*Multiple markets NET score

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

*Multiple markets NET score

Brand rankings

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

*Multiple markets NET score

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

*Multiple markets NET score

Top 10 biggest movers 2022 to 2023

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

Top 5 new entrants 2023

Brand	2023 National Rank
University of Iowa Health Care	3
UR Medicine	5
Baptist Health	14
Palm Beach Health Network	27
Roper St. Francis Healthcare	28

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

Brand
Heal
Parsley Health
Kindbody
Maven
Forward
Carbon Health

Top 30 most trusted brands in 2023

As we outlined in chapter 2, trust is a challenging value to rekindle among consumers, especially younger ones. Along with the top ten that we already celebrated, we wanted to provide a deeper view into the brands that are getting trust right in today's challenging environment. Below are the 30 most trusted healthcare brands among more than 200 brands evaluated in this year's Humanizing Brand Experience study.

Rank	Brand	
1	Emory Healthcare	82%
2	University of Iowa Health Care	81%
3	Northwestern Medicine	79%
4	Mayo Clinic*	79%
5	Johns Hopkins Medicine*	77%
6	UT Southwestern Medical Center	75%
7	OhioHealth	74%
8	Cedars-Sinai	74%
9	Ochsner Health	74%
10	UChicago Medicine	74%
11	Mass General Brigham	73%
12	Baptist Health South Florida	73%
13	Torrance Memorial Medical Center	72%
14	University of Miami Health System	72%
15	Baptist Health System	72%

*Multiple markets NET score

Rank	Brand	
16	Valley Health System	72%
17	University of Maryland Medical System	72%
18	Memorial Healthcare System	71%
19	Northeast Georgia Health System	71%
20	Duke Health	71%
21	UW Medicine	71%
22	Hoag Memorial Health	71%
23	The Ohio State University Wexner Medical Center	71%
24	The University of Kansas Health System	71%
25	Roper St. Francis Healthcare	70%
26	Crouse Health	70%
27	Nebraska Medicine	70%
28	UR Medicine	70%
29	University Hospitals	70%
30	Northside Hospital Atlanta	70%

*Multiple markets NET score

Section:

IMPLICATIONS AND KEY TAKEAWAYS

2023 Healthcare Brand, Experience and Culture Playbook

This year's title reflects an evolution we've made to include culture as a critical aspect of experience. As the report makes clear, it's no longer satisfactory or effective to look at the world solely through our discipline. Instead, we as leaders have to think across the enterprise and play the role of connector, enabler and integrator.

1

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

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

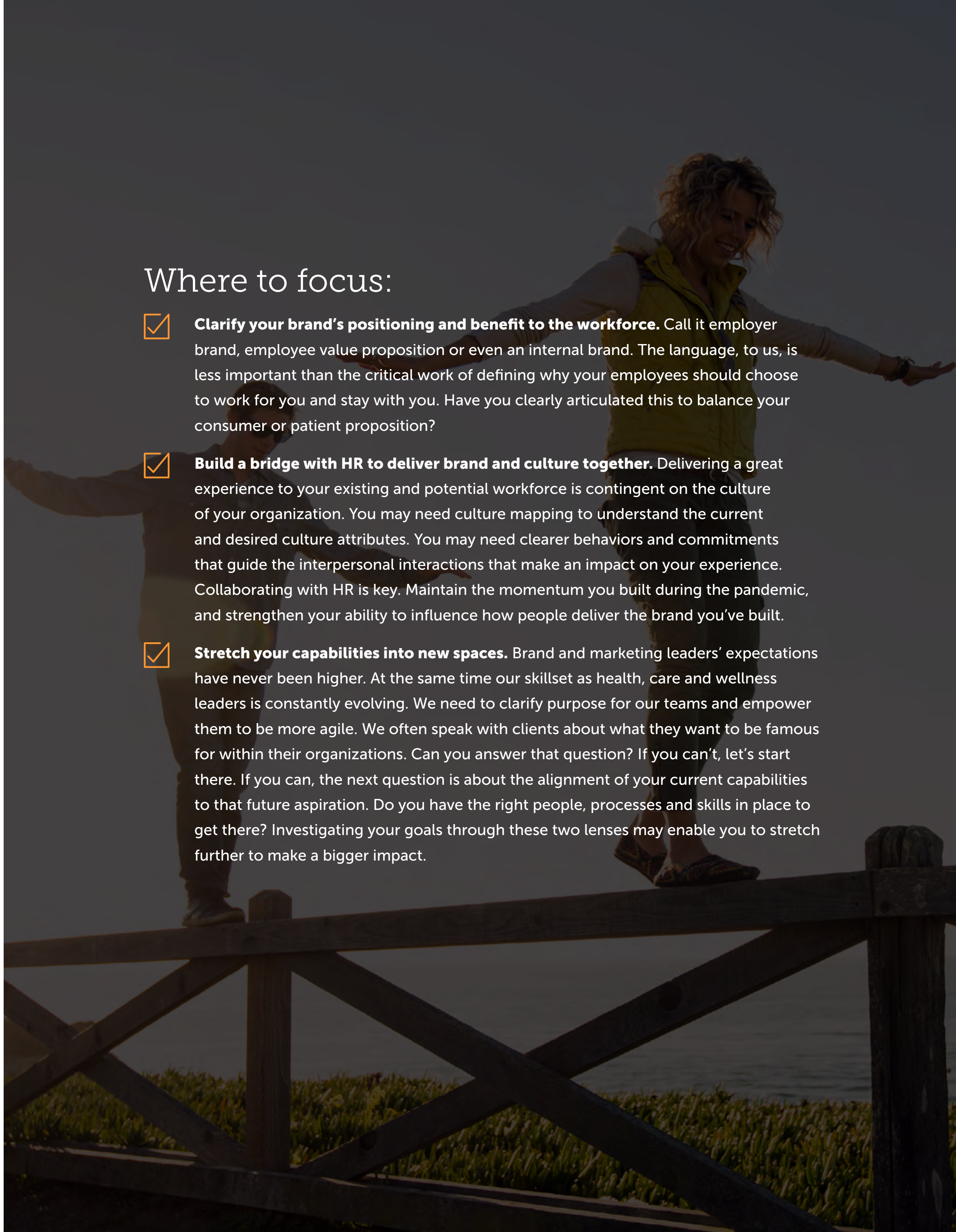
Where to focus:

- **Leadership understanding enables collaborative impact.** Defining the focus areas and priorities for each of your leaders can help them to be more effective. Make sure your peers are clear on your goals and primed to make an impact.
- **Facilitate your colleagues' greatness.** People like you, with marketing and brand in their DNA, are natural at understanding, refining and amplifying stories. Help your leadership peers to understand their own stories and guide them on how they can amplify them—internally and externally.
- **Own the why.** At the end of the day, the ability to make an impact across an organization depends on how much you believe in what you're doing. And belief comes from a clear connection to the why behind the effort. Own that why, whether that comes in the form of quantitative data, a compelling patient story or a direct experience that brings an issue to life. Articulating why your peers should follow you will enable you to create momentum that can make an impact across your enterprise.

2

Rebalance your brand strategy to be equally grounded internally and externally

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



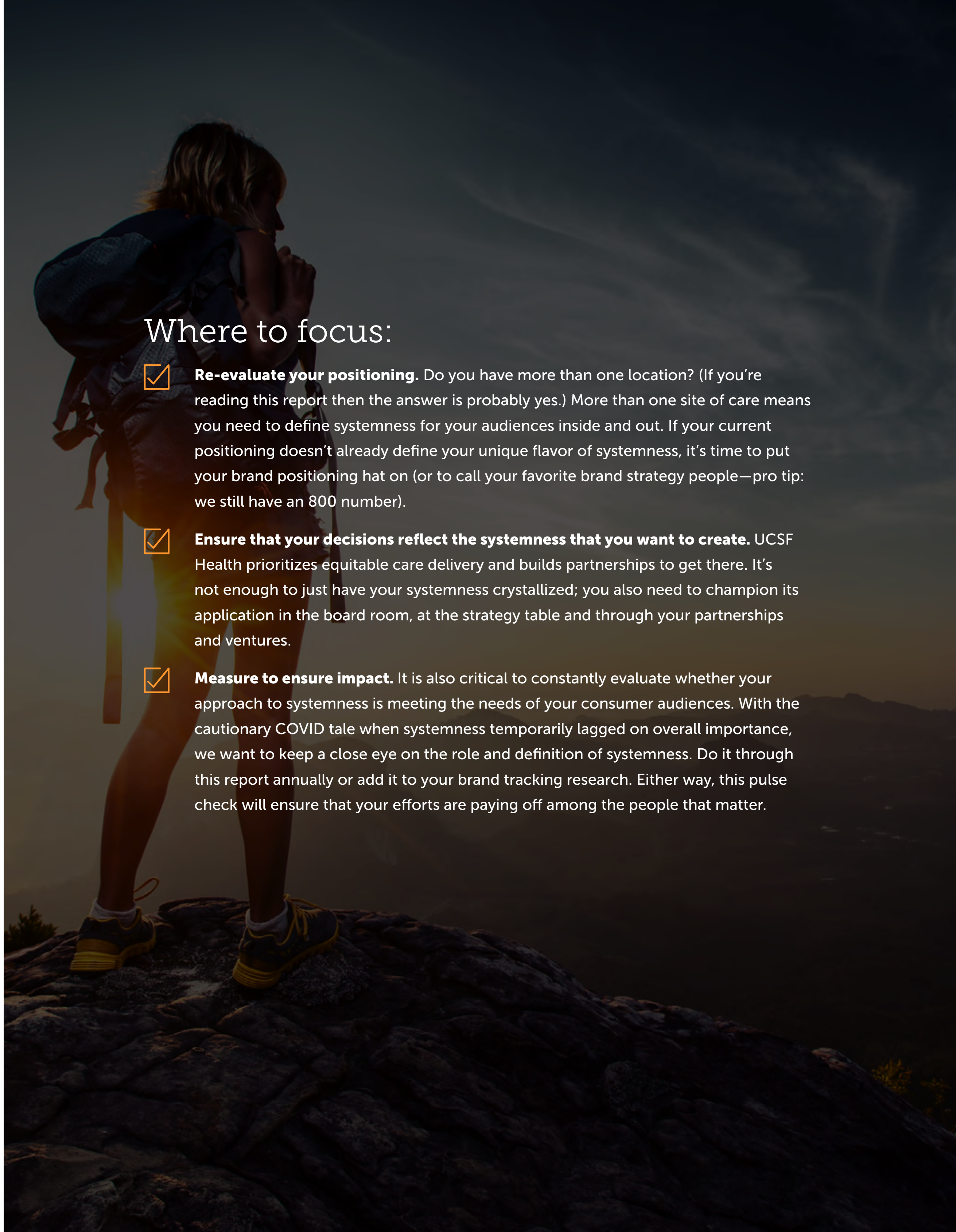
Where to focus:

- **Clarify your brand's positioning and benefit to the workforce.** Call it employer brand, employee value proposition or even an internal brand. The language, to us, is less important than the critical work of defining why your employees should choose to work for you and stay with you. Have you clearly articulated this to balance your consumer or patient proposition?
- **Build a bridge with HR to deliver brand and culture together.** Delivering a great experience to your existing and potential workforce is contingent on the culture of your organization. You may need culture mapping to understand the current and desired culture attributes. You may need clearer behaviors and commitments that guide the interpersonal interactions that make an impact on your experience. Collaborating with HR is key. Maintain the momentum you built during the pandemic, and strengthen your ability to influence how people deliver the brand you've built.
- **Stretch your capabilities into new spaces.** Brand and marketing leaders' expectations have never been higher. At the same time our skillset as health, care and wellness leaders is constantly evolving. We need to clarify purpose for our teams and empower them to be more agile. We often speak with clients about what they want to be famous for within their organizations. Can you answer that question? If you can't, let's start there. If you can, the next question is about the alignment of your current capabilities to that future aspiration. Do you have the right people, processes and skills in place to get there? Investigating your goals through these two lenses may enable you to stretch further to make a bigger impact.

3

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

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



Where to focus:

- **Re-evaluate your positioning.** Do you have more than one location? (If you're reading this report then the answer is probably yes.) More than one site of care means you need to define systemness for your audiences inside and out. If your current positioning doesn't already define your unique flavor of systemness, it's time to put your brand positioning hat on (or to call your favorite brand strategy people—pro tip: we still have an 800 number).
- **Ensure that your decisions reflect the systemness that you want to create.** UCSF Health prioritizes equitable care delivery and builds partnerships to get there. It's not enough to just have your systemness crystallized; you also need to champion its application in the board room, at the strategy table and through your partnerships and ventures.
- **Measure to ensure impact.** It is also critical to constantly evaluate whether your approach to systemness is meeting the needs of your consumer audiences. With the cautionary COVID tale when systemness temporarily lagged on overall importance, we want to keep a close eye on the role and definition of systemness. Do it through this report annually or add it to your brand tracking research. Either way, this pulse check will ensure that your efforts are paying off among the people that matter.

4

Rethink the role and performance of your content engine

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

Where to focus:

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

5

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

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

Where to focus:

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

Want to join the movement?

Subscribe to Humanizing Brand Experience and gain access to data for your brand, any set of competitors locally or across the country, as well as any market that matters to you and your leadership colleagues. Joining this exclusive group of brands that drive Humanizing Brand Experience also provides access to the annual report learnings prior to its distribution to the rest of the country. Still hungry for more? Become a part of our Humanizing Brands **Collective,** a growing group of leaders from brands across the country who meet quarterly to share best practices, field new research and challenge what it means to deliver healthcare brand experiences in today's quickly changing world. For more information get in touch with us here: **monigle.com/hbe-membership**

Optimism and the road ahead

It's been a tough, complicated journey for health, care and wellness over the past three years, and we wish we could tell you the path clears on the horizon. But it's not what we see, or that simple. Mapping a successful course of action is going to be built from the inside out, from each of you and from the incredible teams and talents that you are building.

Think about all the amazing things that you have accomplished already. You're impacting lives in big and small ways every single day—even if some days might feel harder than others. When it's all said and done, you have an opportunity that not every leader has in their role—you make a real difference in peoples' lives. Every. Single. Day.

So what's the best part of those rocky seas we are facing? It's that spirit of resilience. That understanding that we're just getting started. There's so much more that we can do, so many more lives that we can touch, so many more new ideas that we can bring to our industry. The future of health, care and wellness is bright, and you'll be the ones that shape it.

As we come to the end of this year's Humanizing Brand Experience report, let's be inspired by the possibilities, let's be motivated by the challenges and let's be confident in our ability to make a real difference in the world.

We can't wait to see what we'll accomplish together.

Methodology and details

THE HUMANS

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

THE METHOD

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

THE NUMBERS

n = 25,521 total respondents

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

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

THE FIELDWORK

Wave 6 (2023) November –December 2022
Wave 5 (2022) November –December 2021
Wave 4 (2021) November –December 2020
Wave 3 (2020) November –December 2019

THE SCIENCE

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

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.

Monigle capabilities are built from human insights and focus on making an impact on the world around us.

1

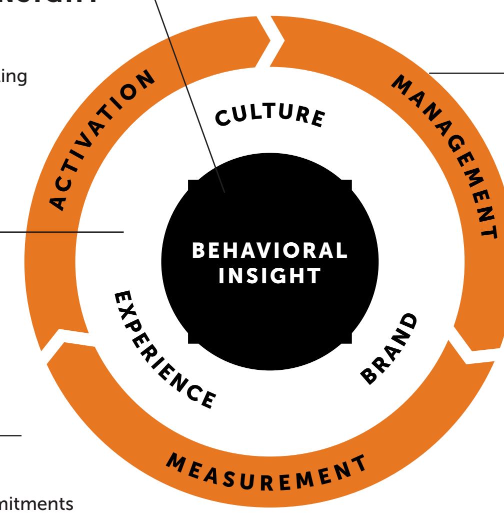
BEHAVIORAL INSIGHT
- Qualitative
- Quantitative
- Analytics and modeling
- User testing
- Humanizing brand

2

BRAND
- Positioning
- Architecture
- Innovation
- Visual identity
- Verbal identity

CULTURE
- Behaviors and commitments
- Employee engagement
- Employee experience
- Service design
- Brand ambassador

EXPERIENCE
- Experience principles
- Journey mapping
- Branded environments



3

ACTIVATION
- Launch
- Implementation and conversion
- Campaign (internal, external)
- Signage and wayfinding

MANAGEMENT
- BEAM brand center
- Governance
- Reimagining guidelines
- Training and education

MEASUREMENT
- Impact planning
- Tracking
- Valuation

monigle