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# The Dangers of De-Personalizing Care

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**Justifies  
Care Deferment**



**Solidifies  
Brand Blur**



**Invites  
New Entrants**



**Invalidates  
Expectations**



**Amplifies Pain  
of Paying**



**Cements  
'No Preference'**



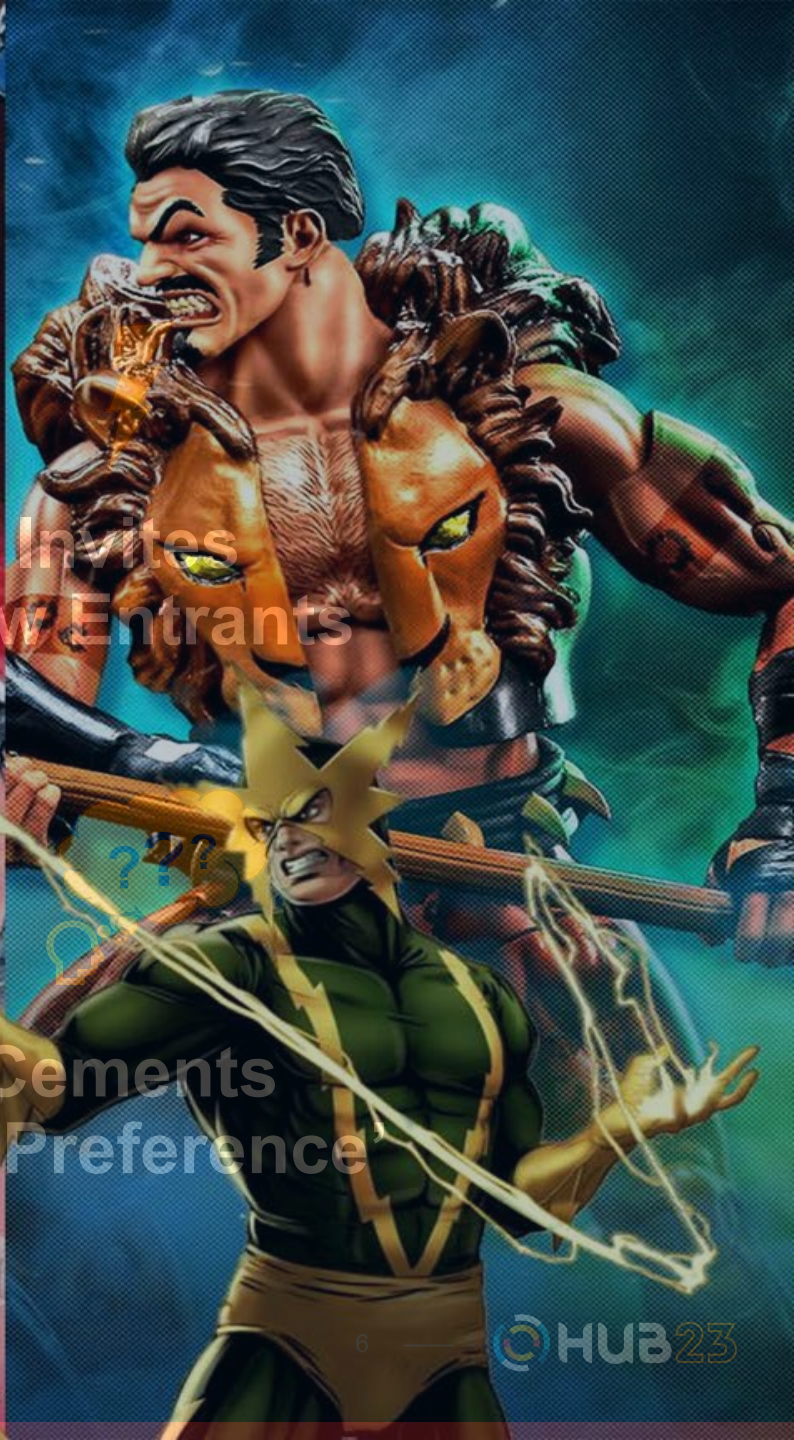
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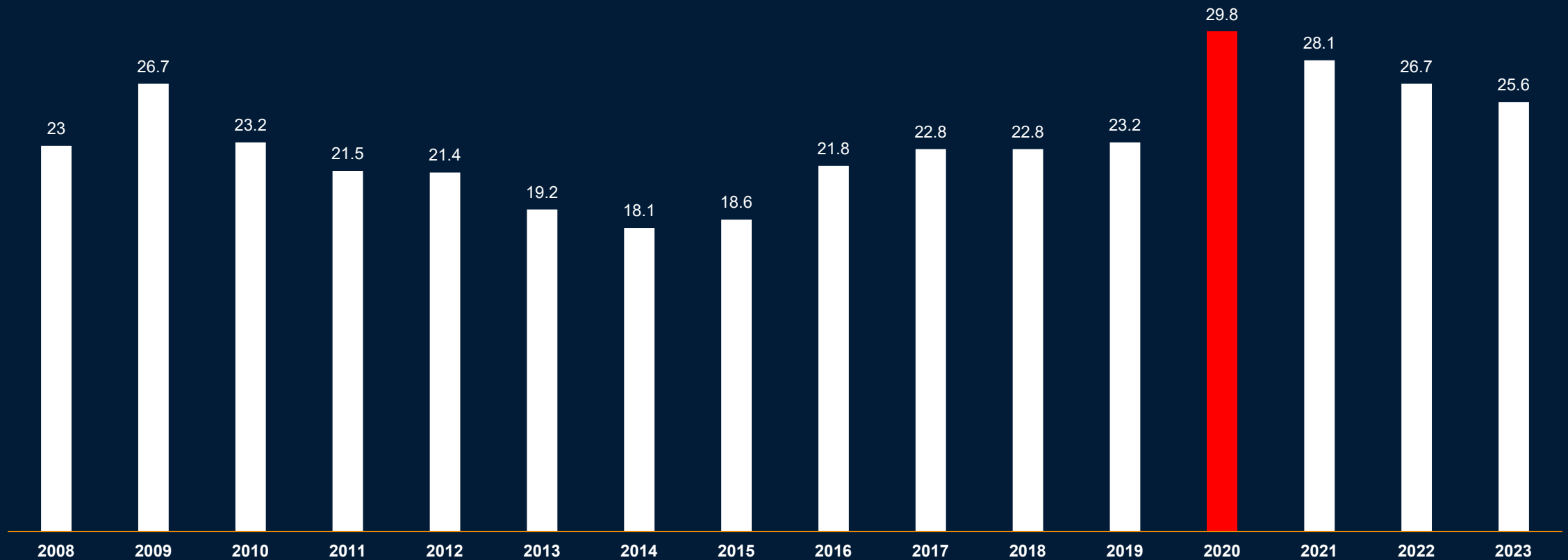
“Never put off till tomorrow  
what can be done today.”

- Thomas Jefferson



# Healthcare Deferment Remains Heartbreakingly High

Have you or someone in your household delayed necessary medical treatment in the last six months?



Source NRC Health's Market Insights study of healthcare consumers, national, 2008-2023



# Solidifies Brand Blur

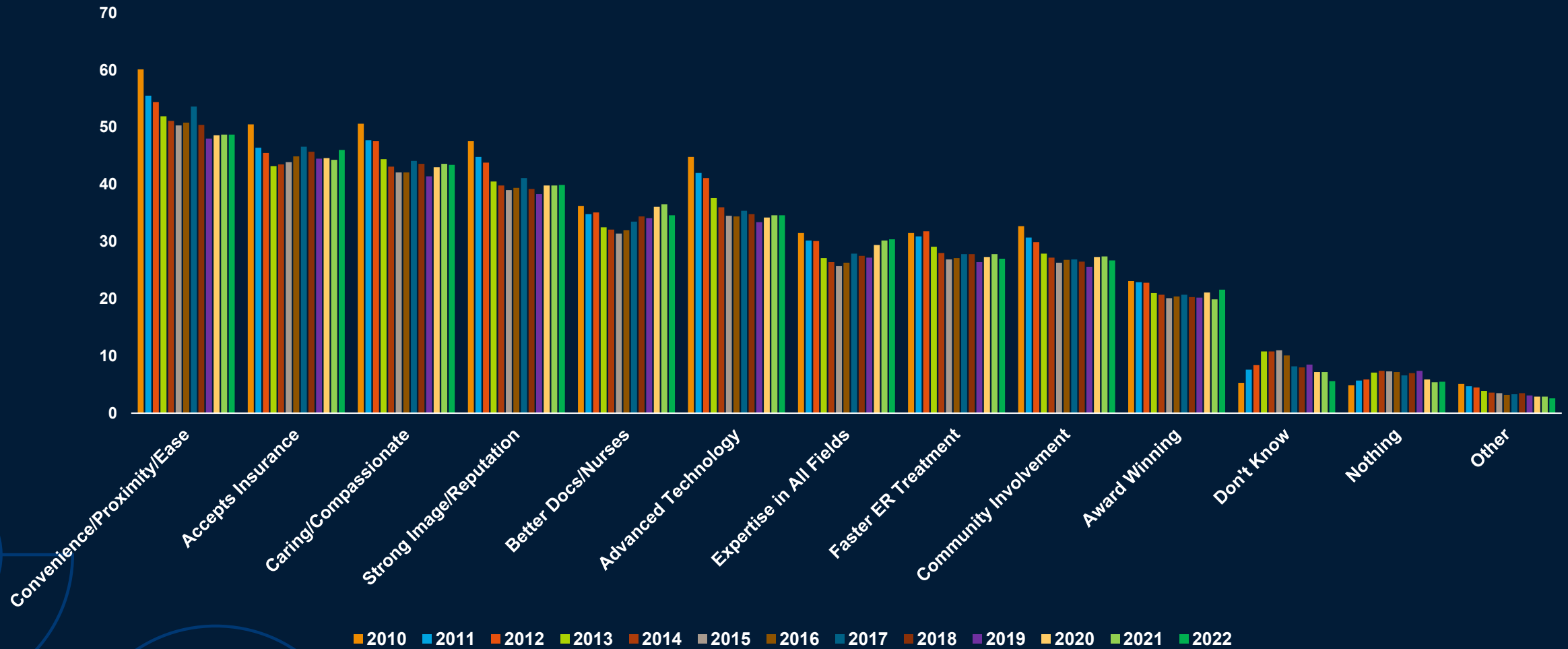
“Who are you (who) (who)  
(who) (who)?”

- The Who

# The Brand Blur: COVID Plunges Us Into Sea of Sameness

- Our powerful show of unity left behind a blur of brands
- Consumers were saturated with COVID messaging
  - 41 percent reported 'hearing the same message' from all healthcare stakeholders in their local area
  - 20 percent reported messaging differences
- Health systems are struggling to send new messages
- Without COVID to define us, who are we?

# Brand Differentiators Continue to Languish Nationally



Source NRC Health's Market Insights, national market trend, 2010-2022, n = 284,111 (annual average)

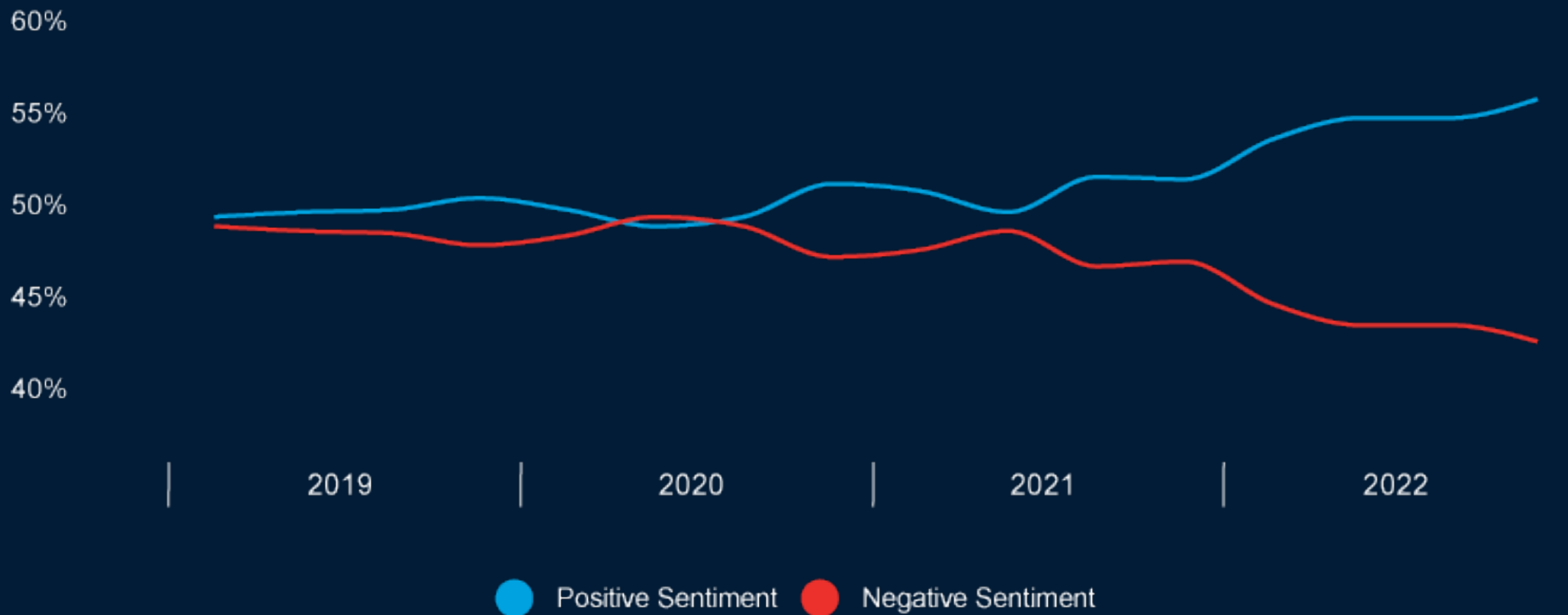


# Invites New Entrants

“I’ll huff, and I’ll puff, and I’ll  
blow your house down.”

- The Big Bad Wolf

# Retail Care Enjoys Growing Positive Sentiment



SOURCE: NRC Health's MARKET INSIGHTS study of healthcare consumers, national, 2019-2022



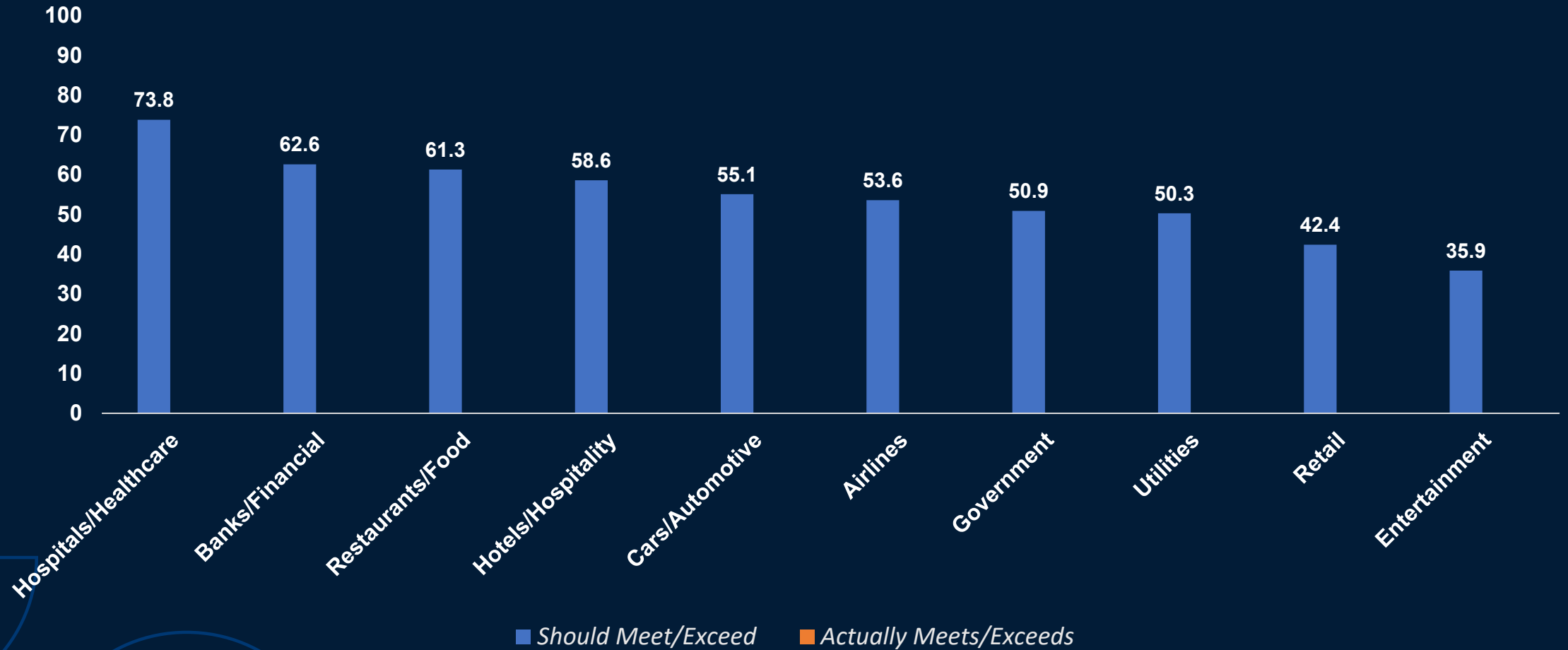


# Invalidates Expectations

“Expectation is the root of all  
heartache.”

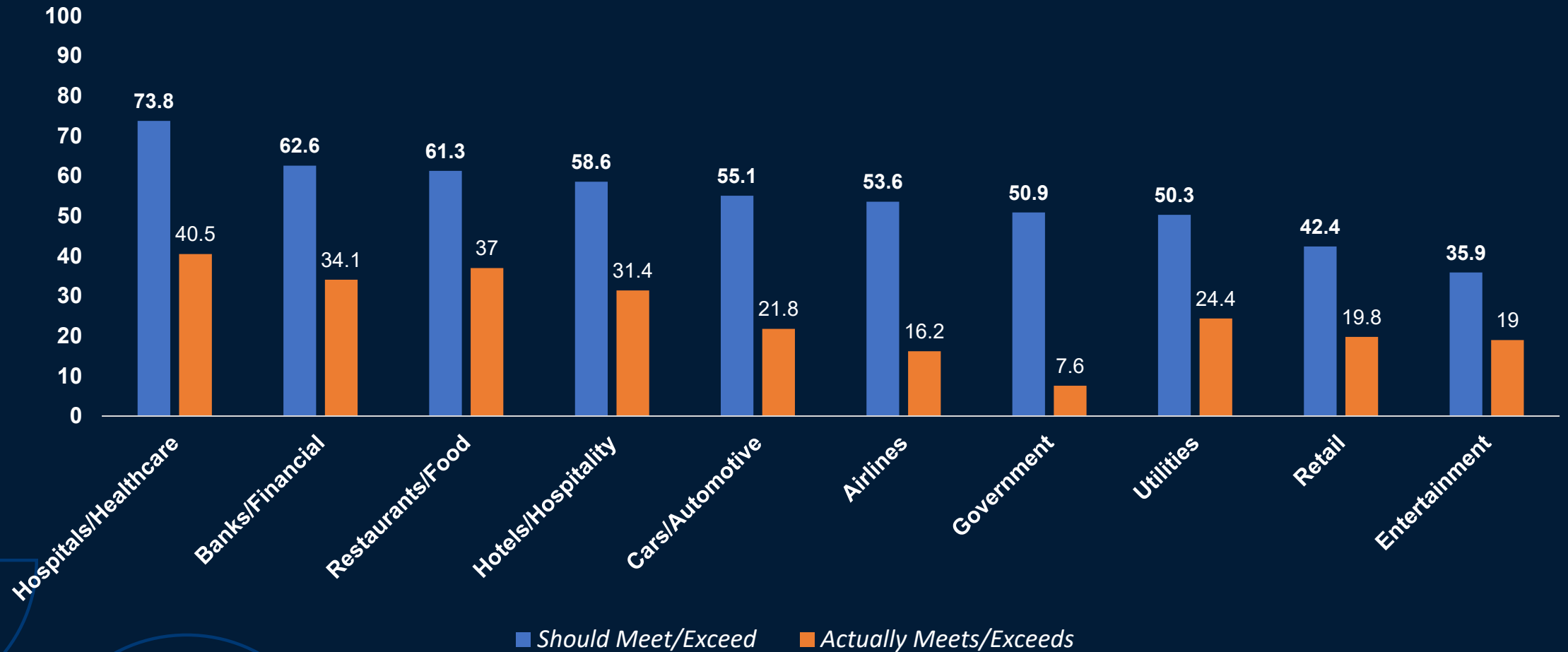
- Shakespeare

# Expectations of Healthcare vs. Other Industries



SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845

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SOURCE: NRC Health's MARKET INSIGHTS study of consumer expectation, 2020, n size = 24,845





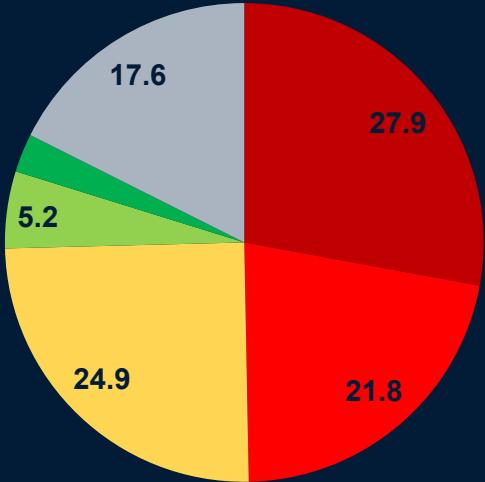
Amplifies  
Pain of Paying

“I’m alright, Jack, keep your  
hands off my stack...money.”

- Pink Floyd

# How Much is Healthcare Tied in with Inflation?

**Agree or Disagree: Prices charged by doctors and hospitals have risen just as much as other expenses (gas, food, rent, etc.) over the past year?**



- Strongly agree
- Somewhat agree
- Neither disagree nor agree
- Somewhat disagree
- Strongly disagree
- Don't know/Not sure





# Cements 'No Preference'

“If you do not know where you want to go, it doesn’t matter which path you take.”

- Lewis Carroll

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In 2021, the percentage of consumers indicating **“no preference”** for a health brand plateaued.



NO HEALTHCARE  
BRAND PREFERENCE

34.5%

-1.5% change | 36% Jan 2021

Consequently, healthcare organizations must strive for seamless connectivity between service recovery and missed patient expectations, driving caregiver recognition and positive comments on social media to enhance reputation. Now is the time for hospitals and health systems to use meaningful advertising and aim their messaging at patients in a personalized way that adds value to their life.



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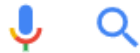


First, we change.  
Then we change the industry.  
Then we change the world.

*- Patient No Longer (page 195)*



Patient No Longer Donohue



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**Patient No Longer: Why Healthcare Must Deliver the Care Experience That Consumers Want and Expect**

Ryan Donohue, Stephen Klasko, MD  
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**“Patient No Longer”  
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