Identity Crisis
Establishing Our Post-COVID Brand
(Before Someone Else Does It For Us)

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Roadmap

- Healthcare's Chronic Chaos

- Exploring Our Organizational Identity

- Consumerism's Big Comeback

- Forging a Future Identity

Healthcare's Chronic Chaos

Healthcare's Chronic Chaos

→ COVID united then divided; financial and workforce challenges feel like a new phase of the pandemic

→ 1 in 3 potential patients are current deferring their care

→ 1 in 3 returning patients lack any brand preference

→ Telemedicine and Virtual Care usage has predictably plateaued

"We've been through three years of a pandemic, and it has been a multi-act drama. We managed through uncertainty with several COVID surges, but the wheels really came off when Omicron hit. The aftershocks are still coming, with a devastating impact on staffing, cost inflation, resource consumption and financial performance for healthcare providers. And it's had an adverse impact on customer service. Despite the headwinds, healthcare providers must double down on supporting caregivers and caring for every patient/member as a unique person if we are going to differentiate our brand promise to those we serve."

— **Mike Slubowski**, *CEO of Trinity Health*

Exploring Our Organizational Identity

Identity Status Model developed by James Marcia

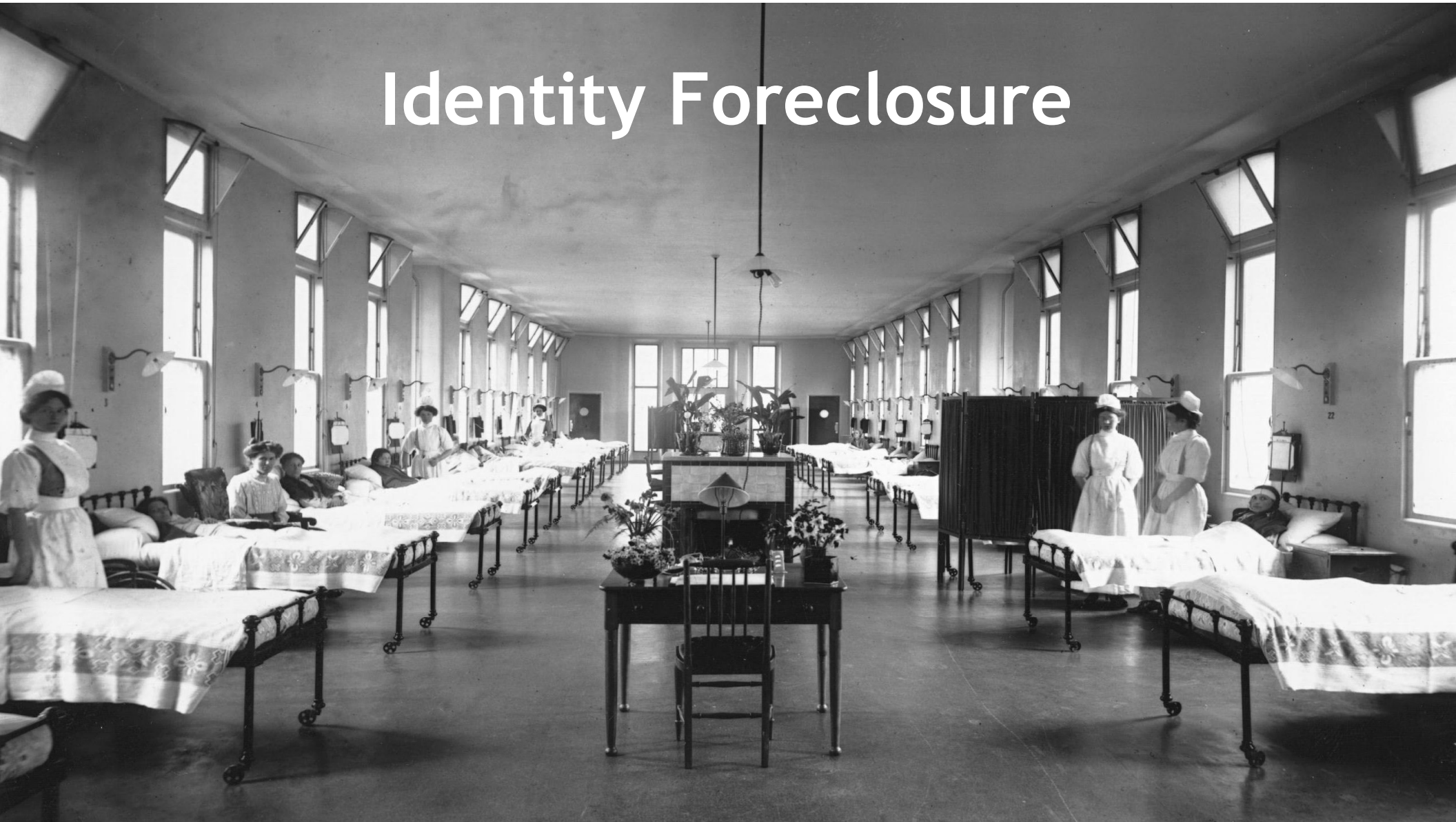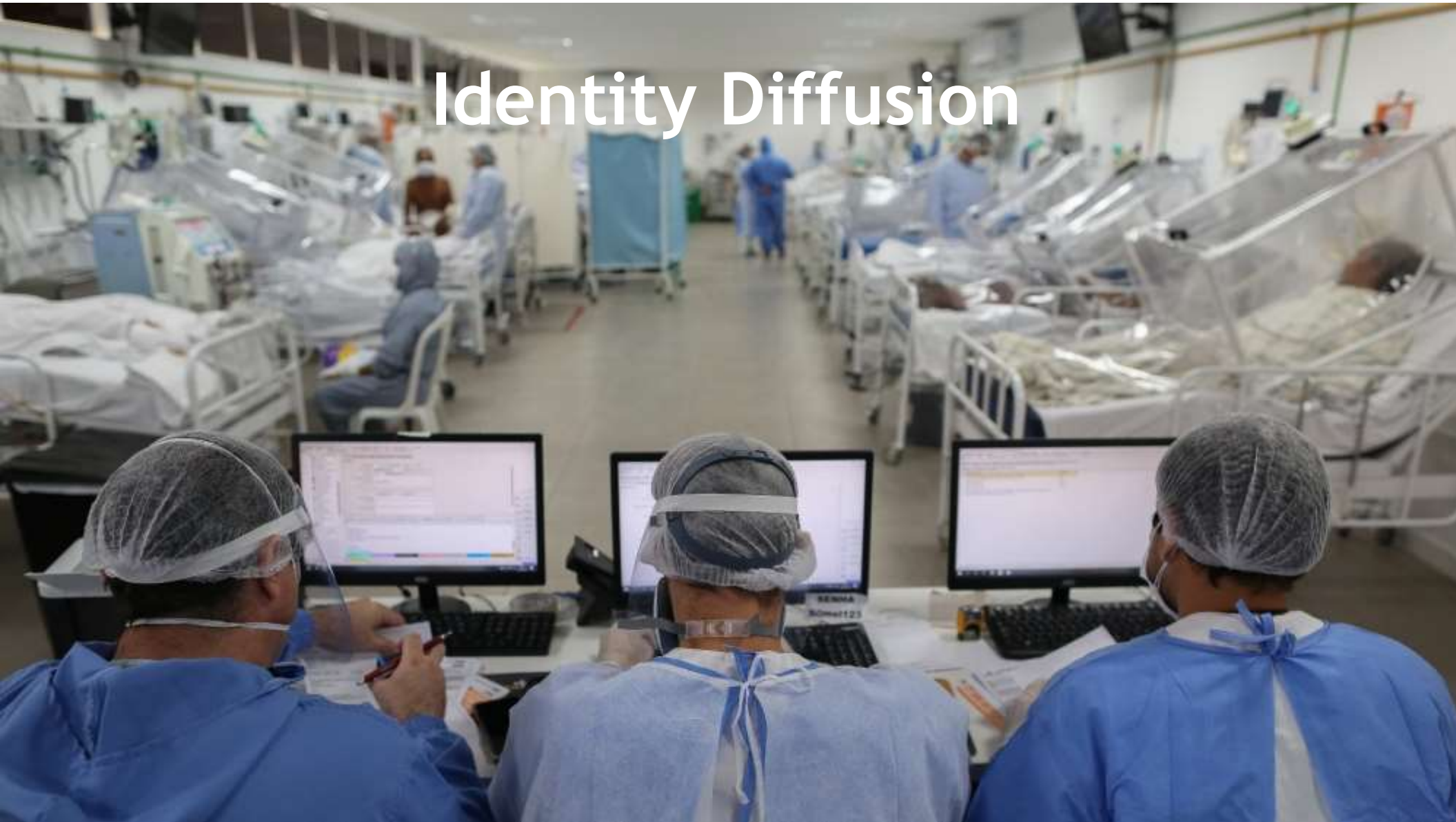|	
Identity Foreclosure	Status is created or inherited without exploring alternatives; often based on pressure or need
Identity Diffusion	May be experiencing a crisis, in isolation, suffering from existential dread, lacking exploration
Identity Moratorium	Actively exploring alternative identities, in crisis but open-minded, order is sought over chaos
Identity Achievement	Crisis has been worked through, identity explored, new commitments forged, new identity achieved (locus of identity is often more internal than external)

Identity Foreclosure

Identity Diffusion

Identity Moratorium

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Your New Brand: The COVID-19 Health System™

→ 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?
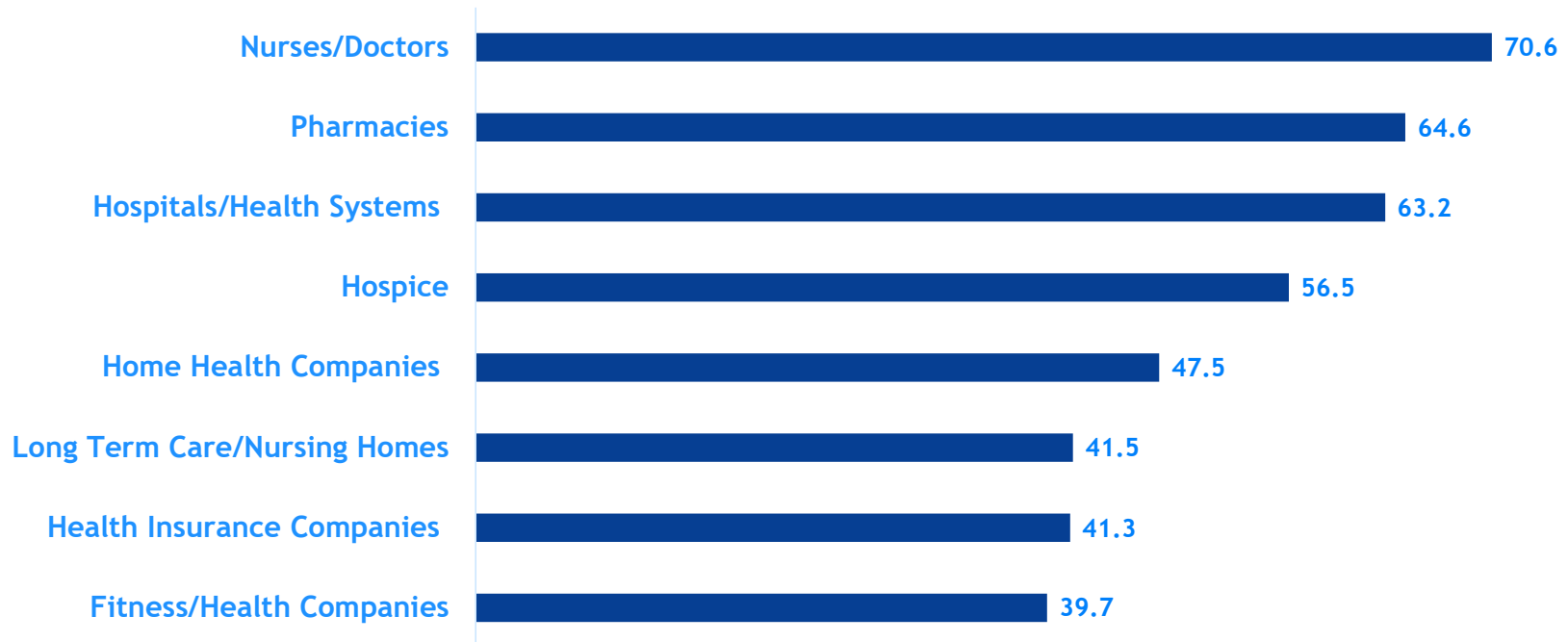
Consumerism's Big Comeback

How Do Consumers Perceive Us Right Now?

→ **'Healthcare Heroes' long gone? Not necessarily...**

- Only 1 in 10 consumers say their outlook on healthcare providers has worsened since COVID

- 27% say their outlook has improved (63% say it's the same)

→ **Consumer perceptions of 'Quality' tell a similar story**

  → Only 12% of consumers say the quality provided by their local healthcare providers has worsened

  → 18% say quality of care has improved (70% say it's the same)

Who Do Consumers Trust in Healthcare Right Now?

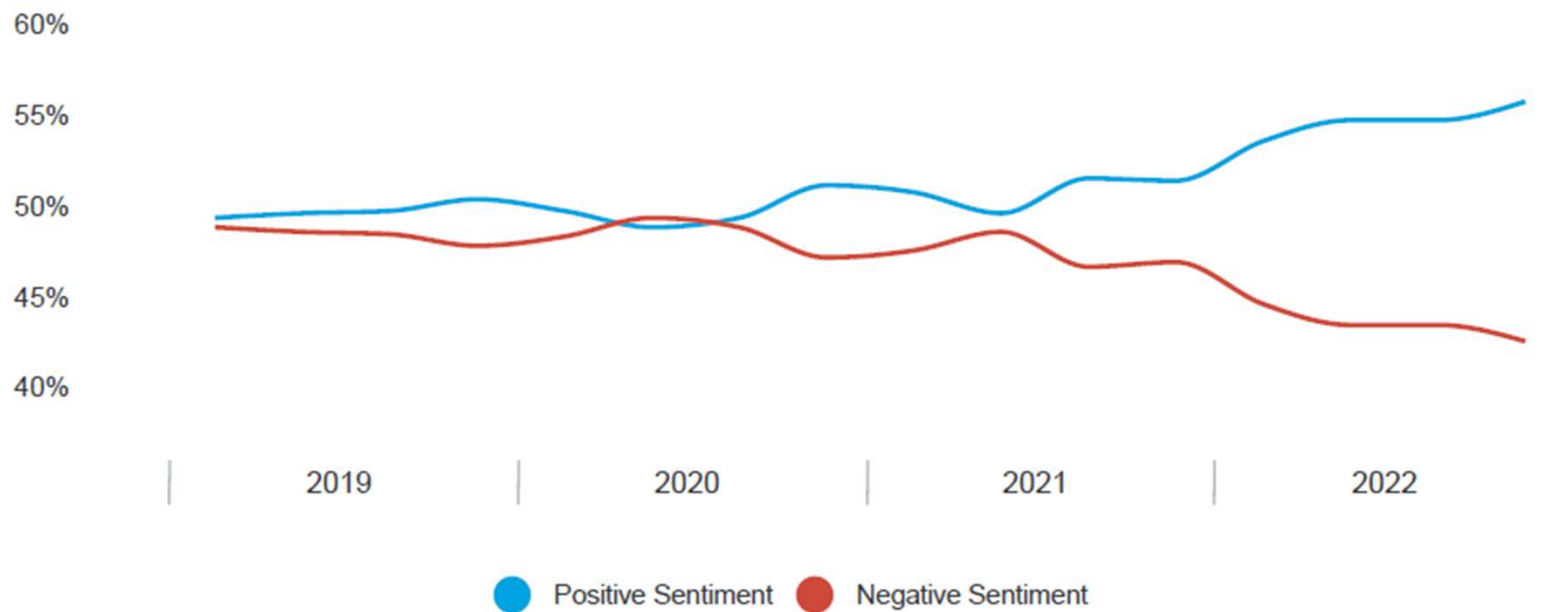**How would you rate your overall trust and confidence in the following?
(asked individually)**

Nurses/Doctors	70.6
Pharmacies	64.6
Hospitals/Health Systems	63.2
Hospice	56.5
Home Health Companies	47.5
Long Term Care/Nursing Homes	41.5
Health Insurance Companies	41.3
Fitness/Health Companies	39.7

Are Post-COVID Consumers Feeling Adventurous?

→ **Consumers not overly willing to switch (post-COVID)**

- 13% more likely to try a new healthcare provider

- 17% less likely to try a new place (7 in 10 neither likely nor unlikely)

→ **Openness to visit a pharmacy or retail clinic for future care**

- 48% would visit a pharmacy like CVS or Walgreens to receive care

- This care would include seeing a doctor and/or getting tests done

- 28% would not consider this; 24% aren't sure if they would

Consumer Sentiment Toward Care in Retail Settings

Chart showing Positive Sentiment (blue) and Negative Sentiment (red) from 2019 to 2022, with y-axis from 40% to 60%.

- Positive Sentiment (blue)
- Negative Sentiment (red)

Affordability Continues to Elude Healthcare Consumers

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?

Pie chart values: 27.9, 21.8, 24.9, 5.2, 2.6, 17.6
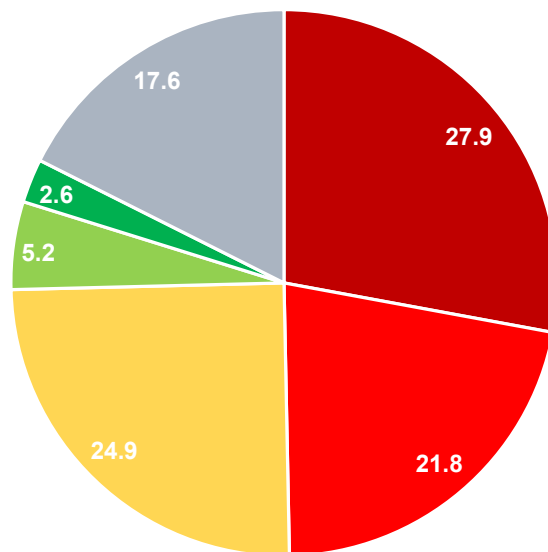
Legend:
- Strongly agree
- Somewhat agree
- Neither disagree nor agree
- Somewhat disagree
- Strongly disagree
- Don't know/Not sure

General health   Sexual health   Skin and hair   Prescription renewals   Help / FAQ   Sign in   **Find a treatment**

Healthcare is a message away

Get treatment for common health concerns at your convenience—no appointments or video calls required.

Find a treatment

Featured

| UTI | COVID-19 | Erectile dysfunction | Pink eye | Birth control |

No appointment needed

Start a visit quickly and discreetly, whenever works best for you.

Personalized treatment

Your clinician will review your symptoms and prescribe treatment.

US-licensed clinicians

We work with qualified doctors and nurse practitioners.

Your health data is secure

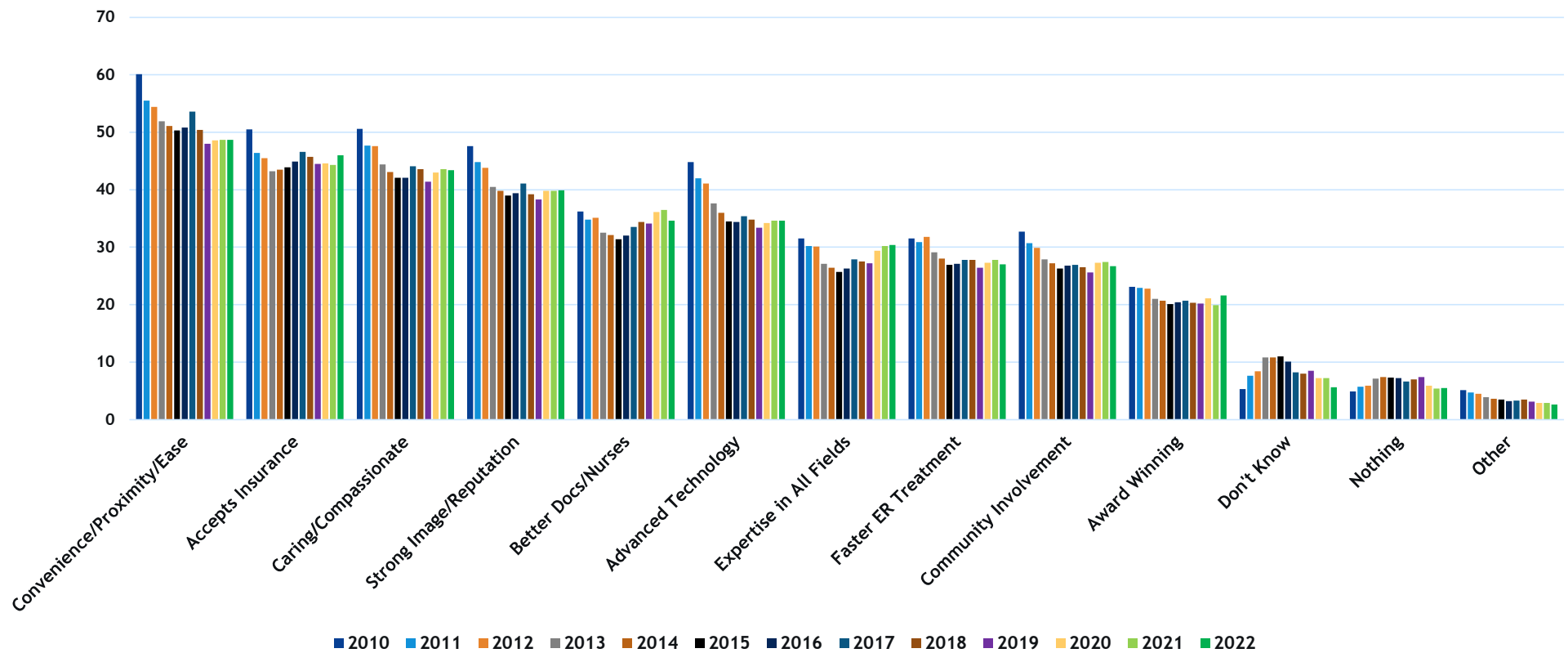All of your information is protected by our practices and by law.

Outside Healthcare

Forging a Future Identity

National Comparison of Brand Differentiators

28

What All Constitutes Our Brand?

BUSINESS AND COMMUNICATION TOOLS

Advertising

Public Relations

Collateral

Direct mail

Publications

Forms

Patient bills

DIGITAL CHANNELS

Content Marketing

Social media

Websites

Mobile app

Wearables

OUR BRAND
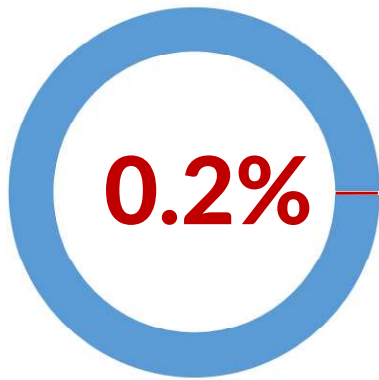
EMPLOYEE AND PHYSICIAN INTERACTION

Staff attitude

Staff knowledge

Staff presentation

Service response & follow-up

FACILITY
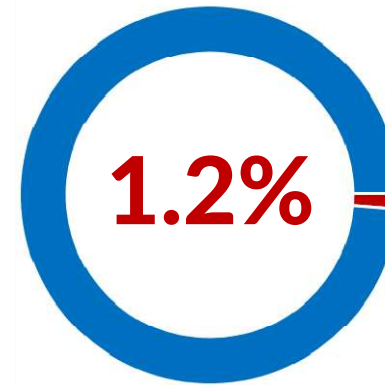
Parking

Presentation & appearance

Way-finding

Cleanliness

Care environment

We Don't Have Much Traditional Time in Front of Patients

0.2%

99.8% of life happens beyond the outpatient setting[*]

1.2%

98.8% of life happens beyond the inpatient setting[**]

[31]

*16 waking hours/day x 365 days/year vs one 15-minute visit every week of the year
**365 days/year vs one hospital stay in a year at the national average LOS of 4.5 days

Healthcare Journey: What's the First Step?

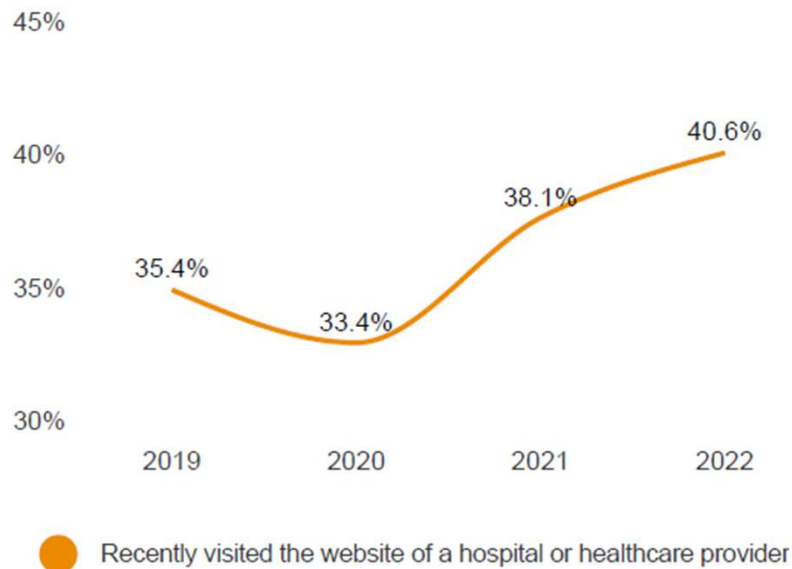**Which of the following do you consider the start of your healthcare journey?**

Category	Value
Making an appointment with my doctor	31
Sensing a problem for the first time	22.2
Don't know/Not sure	16
Research my problem online	15.1
Walking into my first visit related to my problem	10.9
Asking another person about my problem	4.8

Kickstart my care | **Come my way** | **Make it personal**

Digital Front Door is the Ticket to the Game for Consumers

45%

40%

35%

30%

35.4%

33.4%

38.1%

40.6%

2019   2020   2021   2022

● Recently visited the website of a hospital or healthcare provider

When visiting the website of a hospital or health care provider, what information is most important to you?

29.5% How to find a physician

24.8% Patient ratings/reviews of doctors

24.0% Hospital specialty/service lines

22.7% How to find the hospital
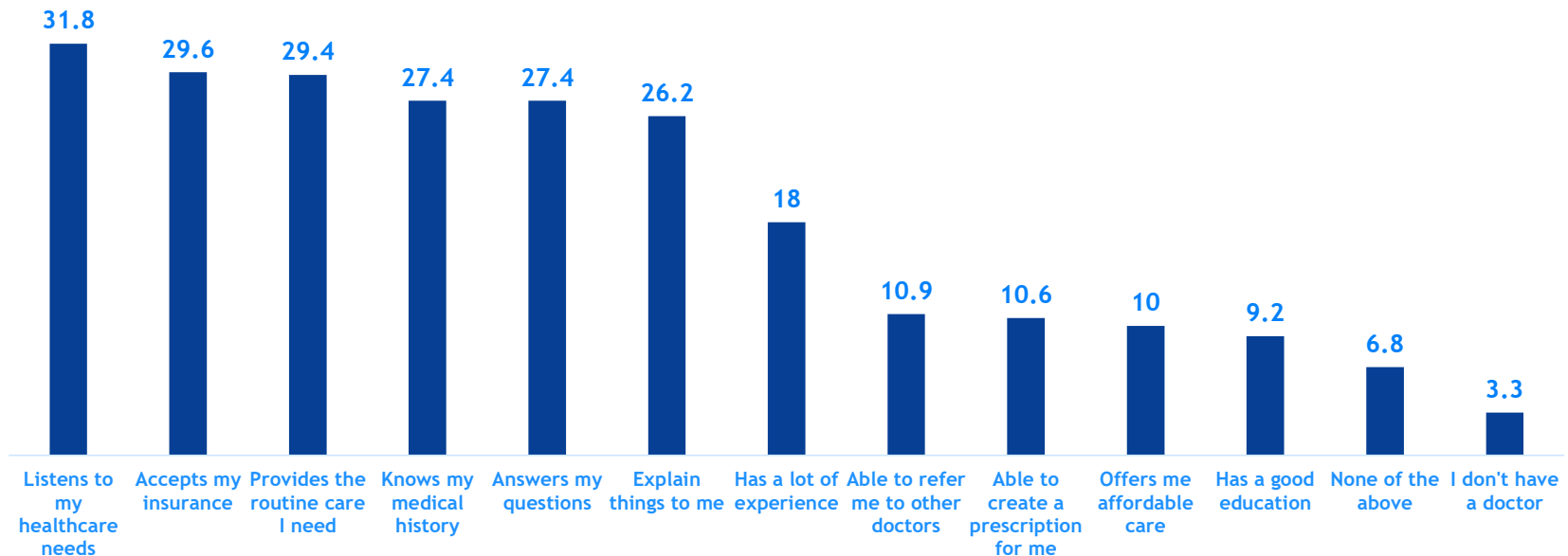
21.7% Doctor bios

Kickstart my care   **Come my way**   **Make it personal**

Why Do You See Your Doctor? What Makes Them Valuable?

When you think about the value of having a doctor, what are the most important reasons why you see your doctor?

Category	Value
Listens to my healthcare needs	31.8
Accepts my insurance	29.6
Provides the routine care I need	29.4
Knows my medical history	27.4
Answers my questions	27.4
Explain things to me	26.2
Has a lot of experience	18
Able to refer me to other doctors	10.9
Able to create a prescription for me	10.6
Offers me affordable care	10
Has a good education	9.2
None of the above	6.8
I don't have a doctor	3.3

Kickstart my care | **Come my way** | **Make it personal**

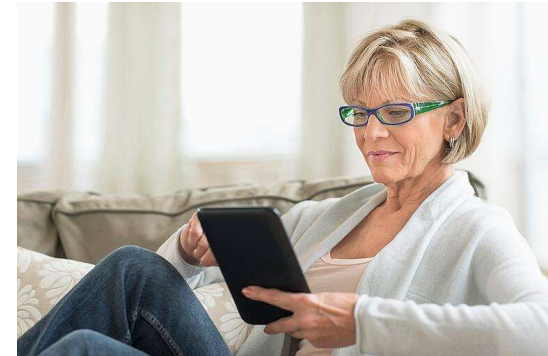## Companies Bet You're Ready to Test at Home for More Than Covid-19

Developers pursue rapid flu and strep-throat diagnostic products, as pandemic raises consumers' comfort level with monitoring own health

An at-home Covid-19 test from Cue Health uses an electronic reader.
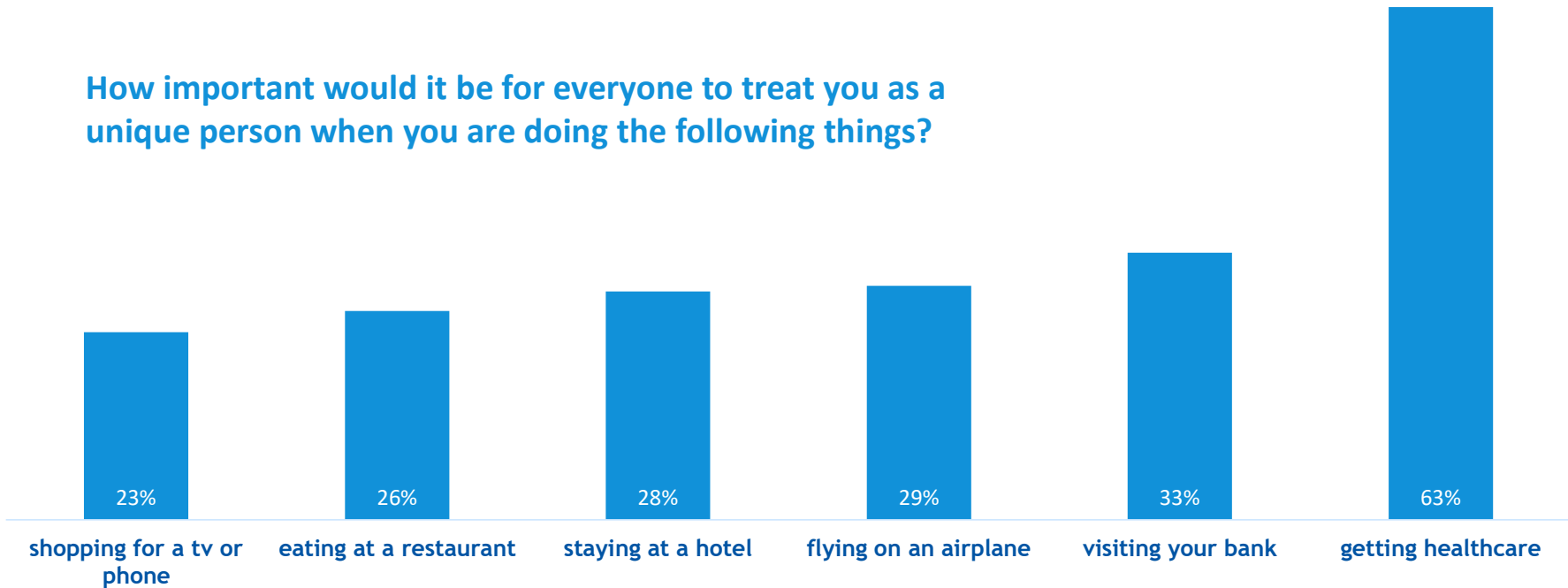PHOTO: CUE HEALTH

Kickstart my care — **Come my way** — **Make it personal**

Does Personalization Matter in Healthcare?

How important would it be for everyone to treat you as a unique person when you are doing the following things?

shopping for a tv or phone	eating at a restaurant	staying at a hotel	flying on an airplane	visiting your bank	getting healthcare
23%	26%	28%	29%	33%	63%

Kickstart my care   **Come my way**   **Make it personal**

People who felt they were treated as unique are 312% more likely to rate an organization's overall image/reputation as 'excellent'.

Kickstart my care   Come my way   Make it personal

Reputation is a "Big Three" Selection Factor for Consumers

**How important would the following factors be
to you when selecting a facility?**

Factor	Value
Hospital Accepts Insurance	86.8
Reputation of Hospital	85.1
Your Doctor Recommends	83.7
Conveniently Located	76.6
Previous Experience w/ Hospital	76.5
Family/Friends Recommend	57.9

Kickstart my care | **Come my way** | **Make it personal**

Five-Step Framework for Strategic Branding

CURRENT STATE	• What is our current brand according to consumers? • What is the current position of our brand?
TARGET	• What are their needs? • How have their priorities shifted?
FRAME OF REFERENCE	• What is the competitive set? • What does the target audience think of them?
POINT OF DIFFERENCE	• Why should they choose you over competitors? – Benefits provided, beyond functional, to create uniqueness – Identity of the brand: what the brand stands for; reinforcing characteristics
REASONS TO BELIEVE	• How should the brand deliver on the value proposition positioning and deliver the promised benefits? – Supporting "facts", big or small, that provide a basis for the consumer to believe that the brand can deliver on the positioning; builds long-lasting **relationship**

Brand Questions at the Board Level:

→ **What is our current brand?**

Do consumers agree with our assessment?

→ **What do we clearly do best?**

Can consumers get it anywhere else?

→ **How do we measure our brand?**

How *should* we measure our brand?

Four Priorities for 2023 and Beyond

1 **COVID's chaos is chronic but it's not all bad news**
We have opportunities amidst the craziness and must take them

2 **Consumers are back and they are ready for something better**
More than switching brands, they want us to prove we are worth it

3 **An identity crisis is always a precursor to a new you**
Our brand's fate rests with our audience and how they feel is our reality – this is our motivation to build ourselves up

4 **Future care must align to the individual receiving care**
Consider the consumer – including employees – as your starting point