

Hospital Brand Equity

A Peer Review by:

Reaction
—Data—



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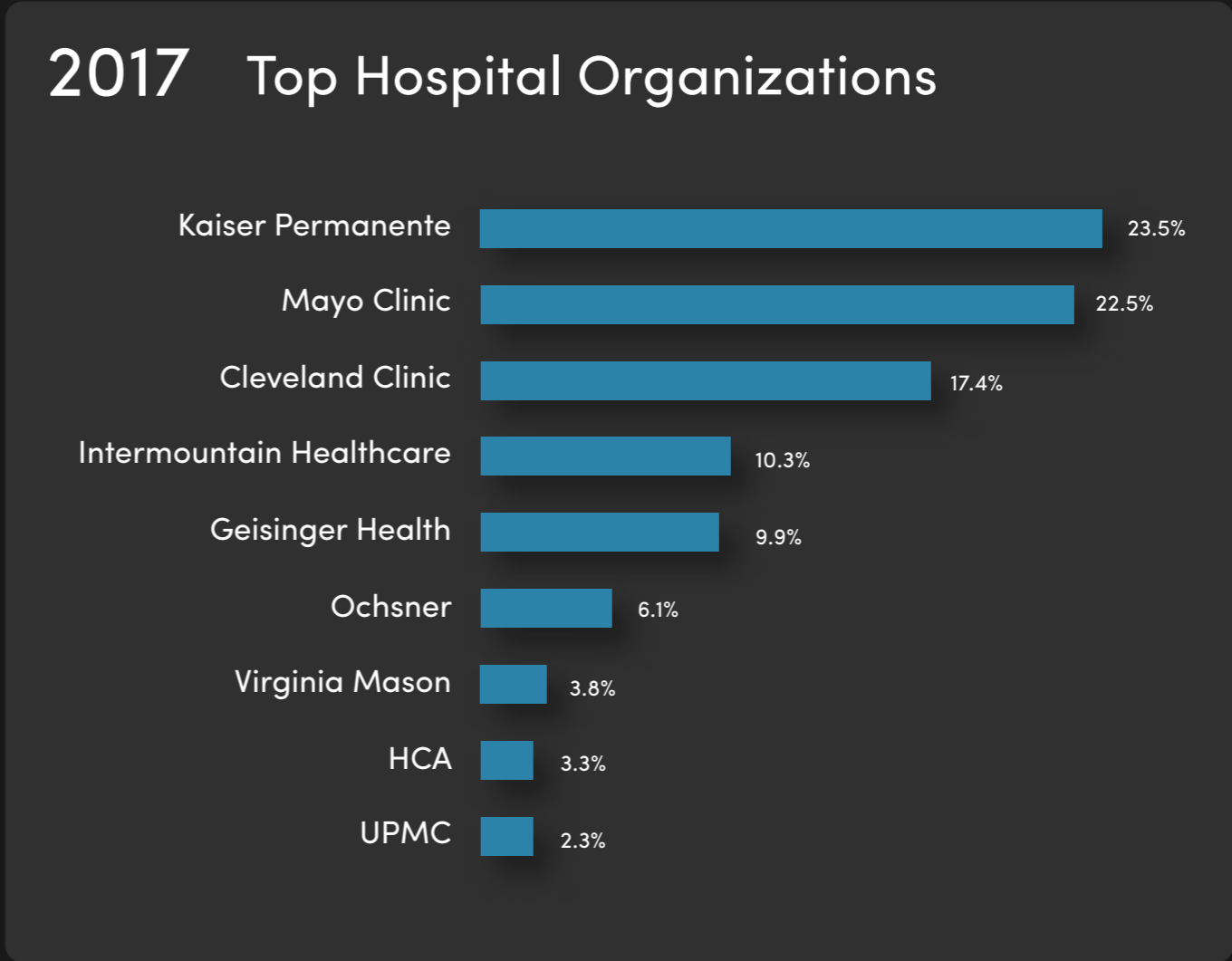
Executive Summary

Reaction Data usually helps our customers understand where they stack-up within the Healthcare Industry by researching their brand recognition, as well as brand reputation. From time to time we also launch brand equity research on our own. Brand equity takes a different spin on traditional brand recognition and reputation research by conducting it among hospital leadership peers rather than the normal audience of a company's customers.

Near the end of 2016, we organized a study to determine brand equity among the top hospital systems throughout the US. Because of such a successful response, and continued interest from the market, we decided to do follow-up initiative to determine current brand equity. This report will focus on 2017 findings but also compare the two studies for key trends.

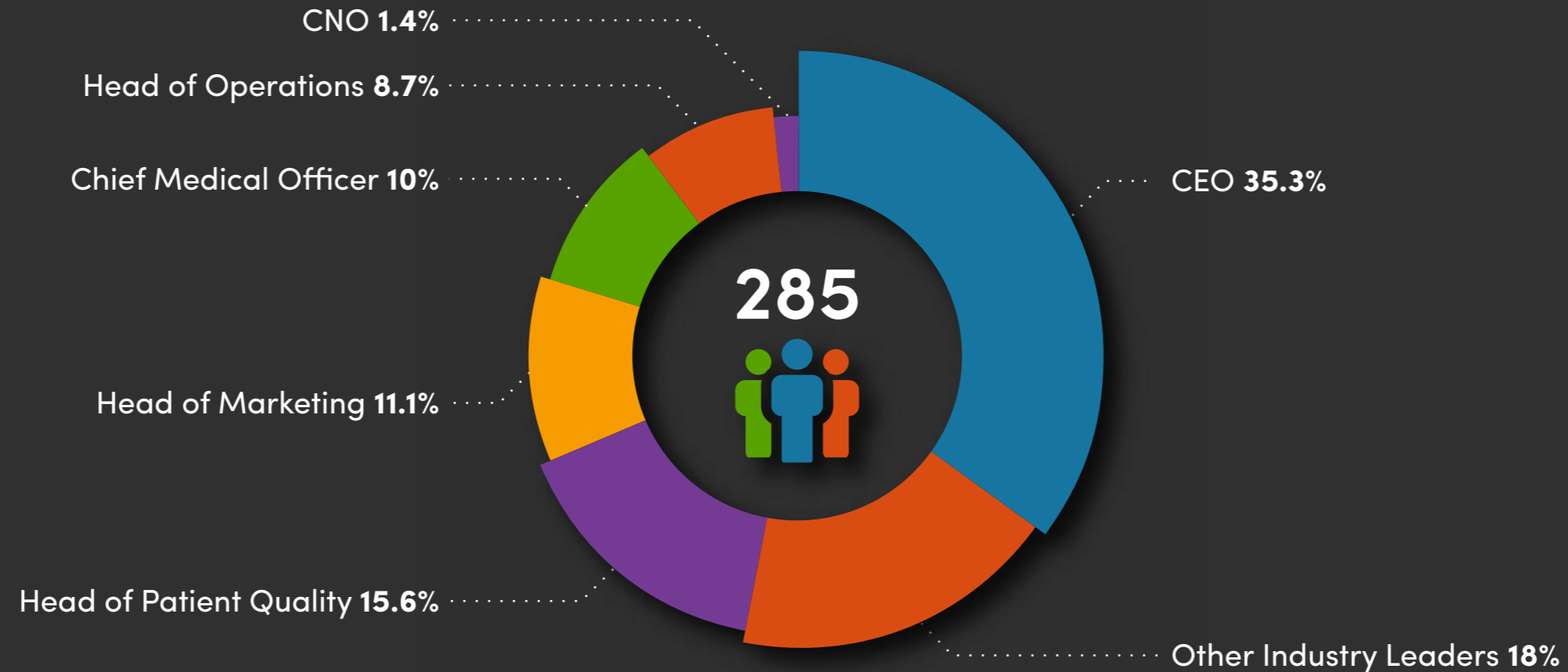
The research was conducted among hospital leadership across the country. We began the initiative with questions regarding recognition and reputation for the top hospital systems from our 2016 study, "How familiar are you with this hospital organization," and "how favorable is your opinion of them?" Then we dive deeper with broader questions about which hospital organizations comes to mind as a model of innovation, thought leadership, and providing quality care at a sustainable cost?"

Although the respondents could choose any hospital organization they wanted to, only 17 of the 285 hospital leaders choose their own organizations, which reveals how well the top 5 contenders in the healthcare industry perform in brand equity. Their advancements in innovation, thought leadership, and care quality keep them top of mind.



Demographics

2017

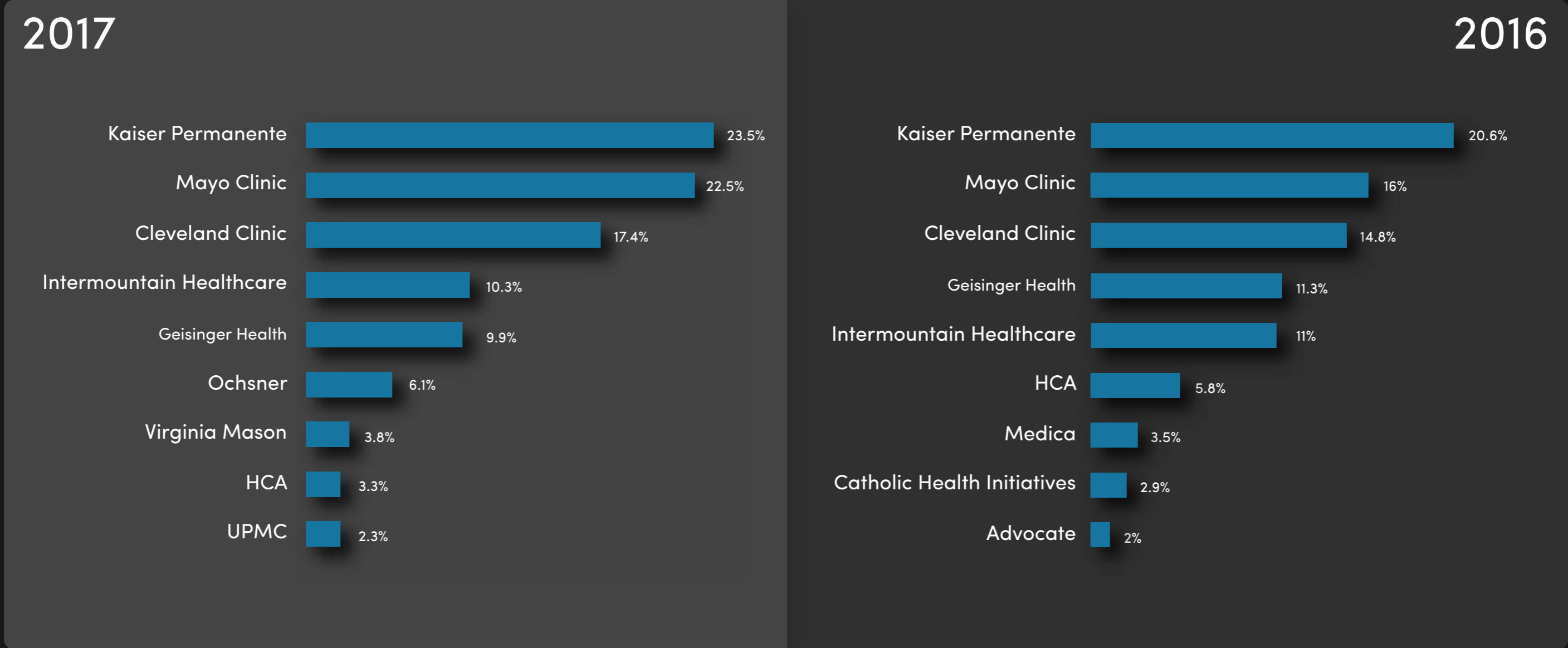


This brand equity study gathers research from a peer perspective, rather than the traditional brand recognition methodology which is conducted among a brand's customers and target market. We asked a wide variety of hospital leaders about which provider organization they thought embodied innovation, thought leadership, and quality of care at a

sustainable cost. In addition, we wanted to take a focused look at those hospitals that continually showed up as top health systems. We asked respondents how well they knew the respective hospitals, and how favorable their opinion was of them.

Top Hospital Organizations

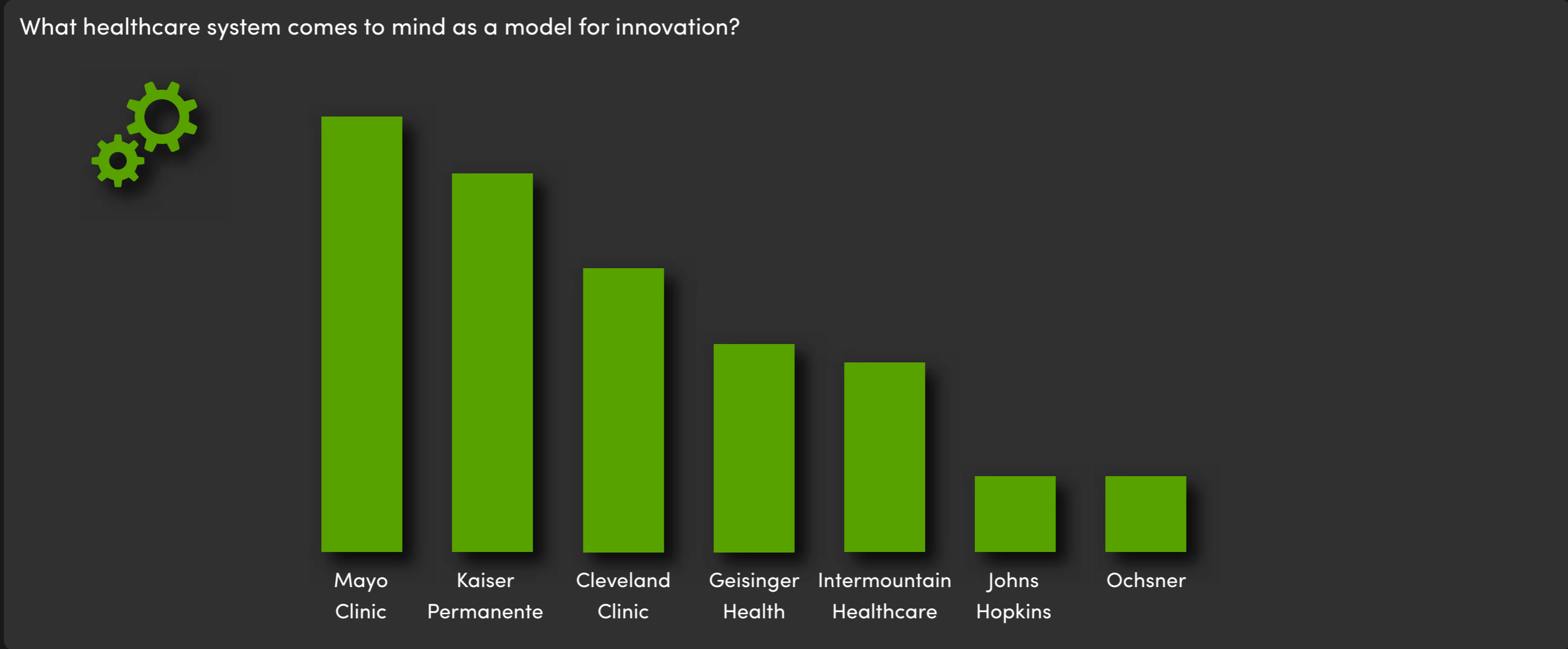
Comprised of the following categories **Innovation** **Thought Leadership** **Quality Care at a Sustainable Cost**



These numbers reflect the combined percentages of three categories; innovation, thought leadership, and quality care at a sustainable cost. Even with the questions being open text format, results from both 2016 and 2017 show the same top five organizations were written in each time. Each of the top five

are in similar order each year, with the exception being Geisinger and Intermountain switching spots. HCA is the other notable organization to show up in both reports while dropping a couple spots.

Most Innovative

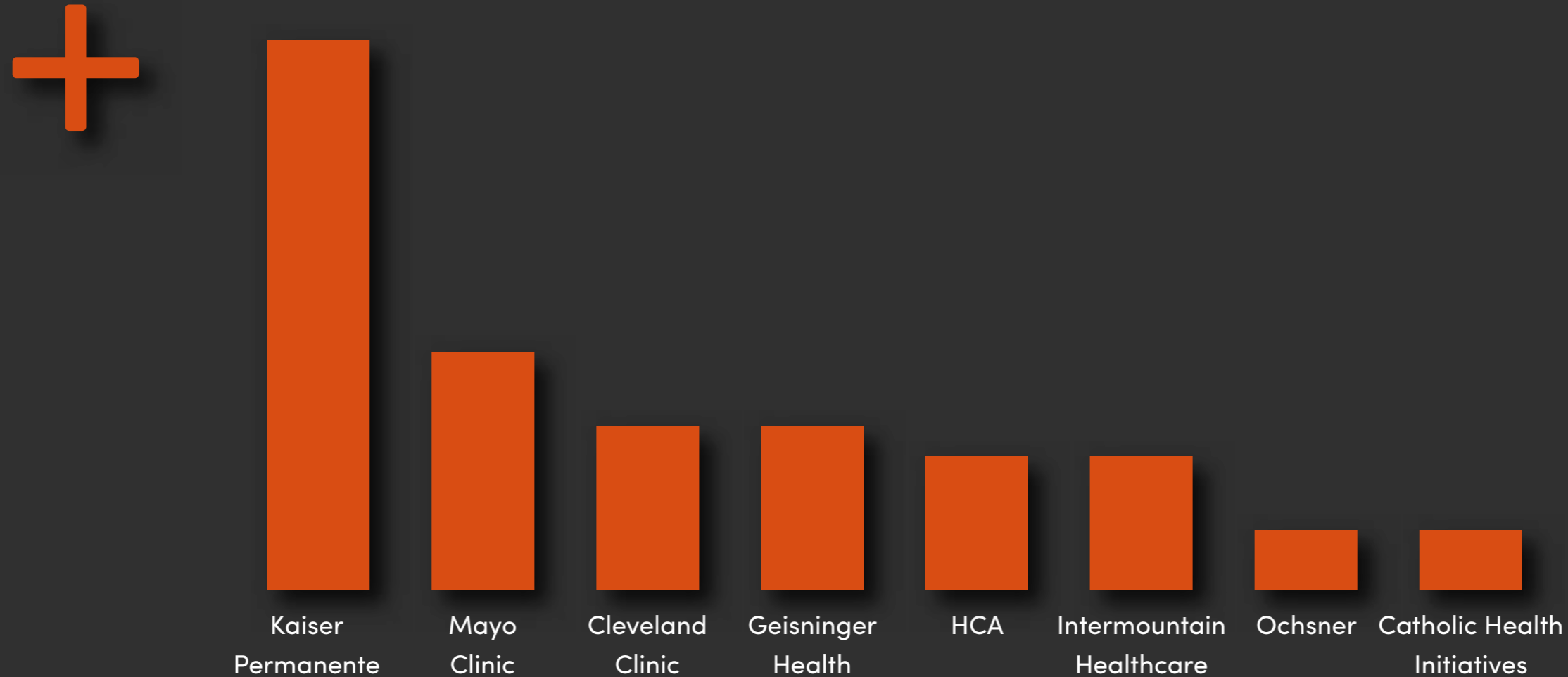


Again, it's important to remember that the data show in these next few graphs come from an open text questions. We did not prompt participants to respond in any particular way. We can't say exactly what would make respondents view a particular organization as being "innovative", for example, but typically

means the hospital is leading out in the industry by adopting new clinical or operational strategies and/or tactics. They are typically early adopters of new technology, and aren't afraid to take calculated risks.

Highest Quality of Care at a Sustainable Cost

What healthcare system comes to mind as a model for delivering high quality at sustainable costs?

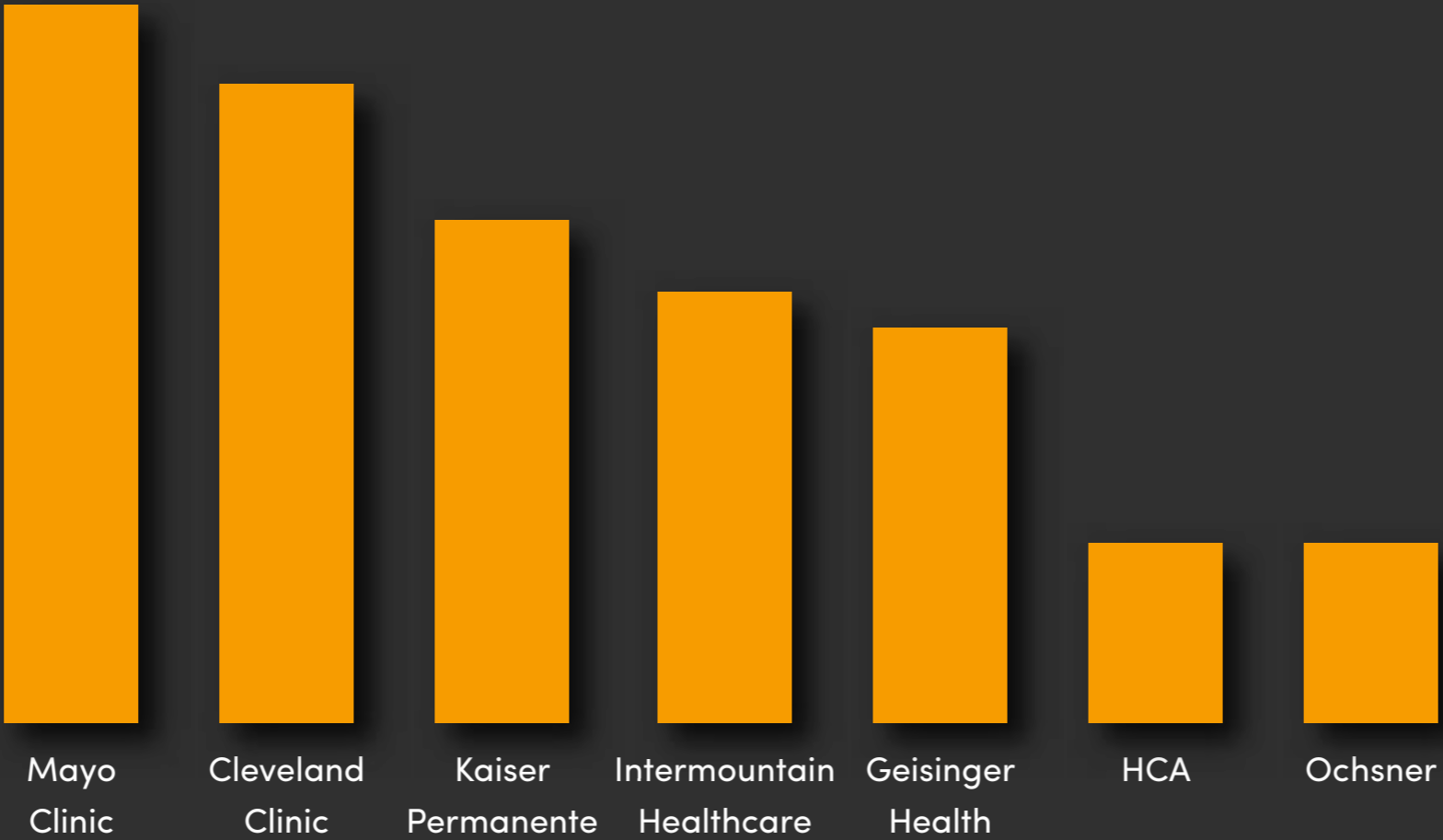


When it comes to controlling costs while maintaining a high-level of patient care, Kaiser Permanente is the runaway winner according to its peers. The delta between Kaiser and its peer group is significant enough to warrant

additional, in-depth, research in an attempt to uncover the underlying reasons (besides the obvious managed care answer).

Top Thought Leaders

What healthcare system comes to mind as a thought leader on topics related to healthcare transformation?



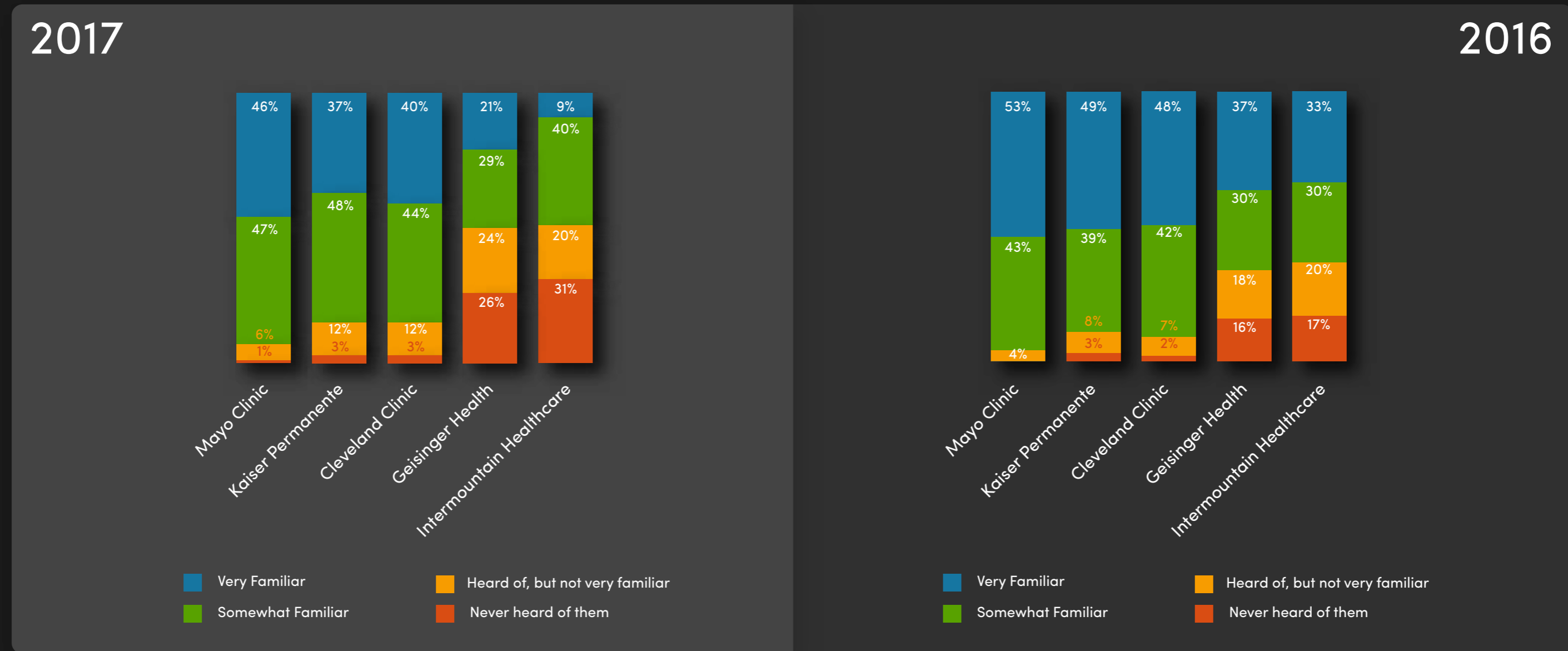
Thought leadership is the most competitive area of the three main categories, however, we still see the five top hospital organizations showing up: Mayo, Cleveland, Kaiser, Intermountain, and Geisinger. Thought leaders oftentimes are the ones that plow ahead through uncharted waters when they see an opportunity. This type of leadership takes courage.

A perfect example of this is the recent announcement that Intermountain Healthcare will be teaming up with other significant health systems to start their own non-profit generic drug company. Shameless plug - look forward to research from us on this topic in the next few weeks.

*scheduled to publish March 26, 2018

Hospital Brand Recognition

How familiar are you with the following hospital organizations?

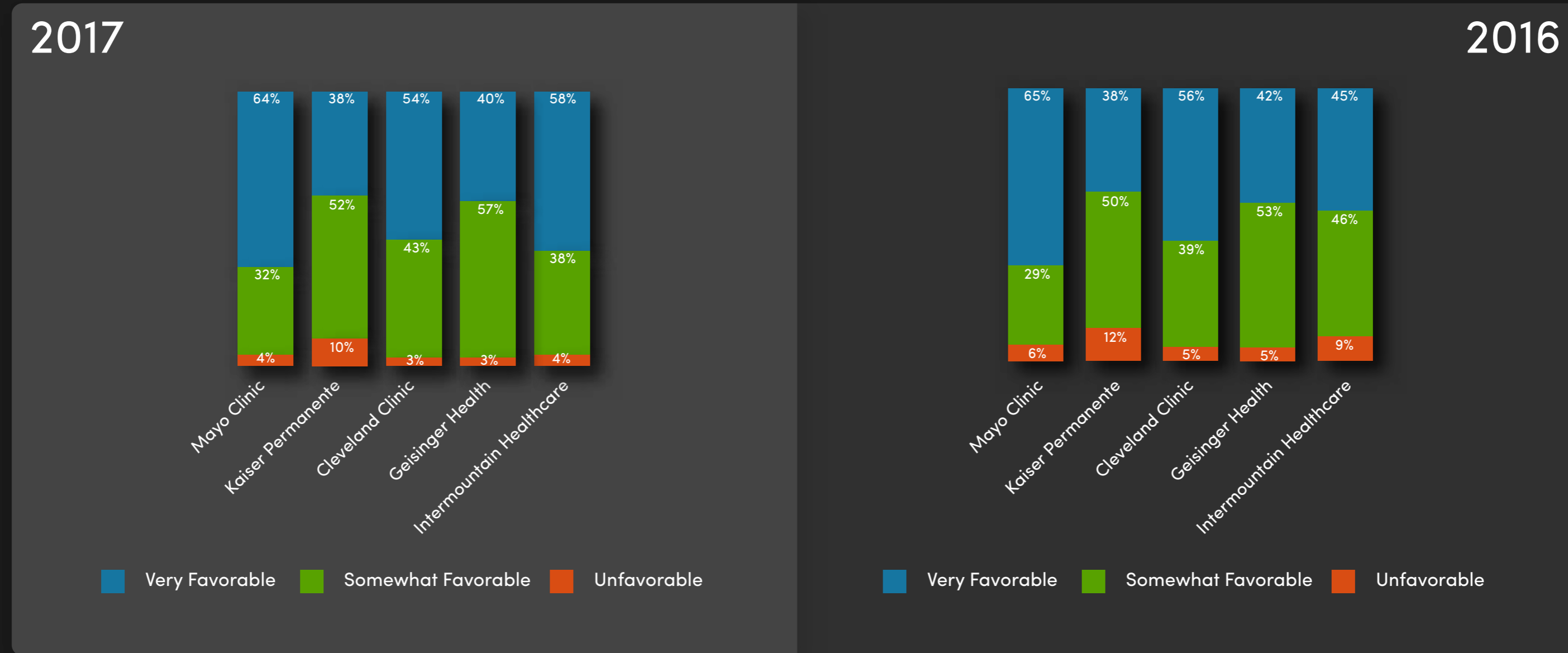


Brand recognition from a patient perspective is vital, but a unique understanding comes from a peer perspective. Keeping an accurate pulse on how aware the overall healthcare market is of your organization will help to expand its regional, national, or even international

influence. As displayed above, Mayo Clinic has done just that. Even though Mayo has a presence in only a few states, they continually hit the mark by being a highly recognized hospital organization throughout the US...and beyond.

Hospital Brand Reputation

How favorable is your opinion of the following hospital organizations?



Perhaps even more important than brand recognition is brand reputation. Of those who know who you are, what do they think of you? Fortunately for these hospital organizations, their unfavorable reputation rate is quite low. Though it is interesting that all five organizations had

an increased percentage of unfavorable voters (with the exception being Intermountain Healthcare who saw a significant increase in votes from its peers). Is this a new trend, or just random chance? Our next report on this topic will provide enhanced clarity to these questions.

Section II – Hospital Breakouts

Section II will cover the breakouts of each of the top five hospitals. The graphs will show both their recognition and reputation scores broken out by the various titles that participated. There is also a second graph on each page that will show you how this year's respondents stack up against last year's results.

Mayo Clinic – As you may have seen by the earlier recognition graphs, Mayo Clinic is the most well-known hospital organization in the country. In 2016 there was not a single respondent who answered “Never heard of them” and in 2017 only one or two gave that response. There really isn't much else to say, they are the most well-known, and favorably viewed hospital in the US.

Kaiser Permanente – Kaiser stayed fairly consistent (exactly consistent when dealing with reputation '16 vs '17) in most of its categories. While both years show Kaiser as having the highest unfavorable rate, they also were first by a large margin when asked who comes to mind as an organization that delivers high quality at a sustainable cost. They also took second and third place in innovation and thought leadership (respectively).

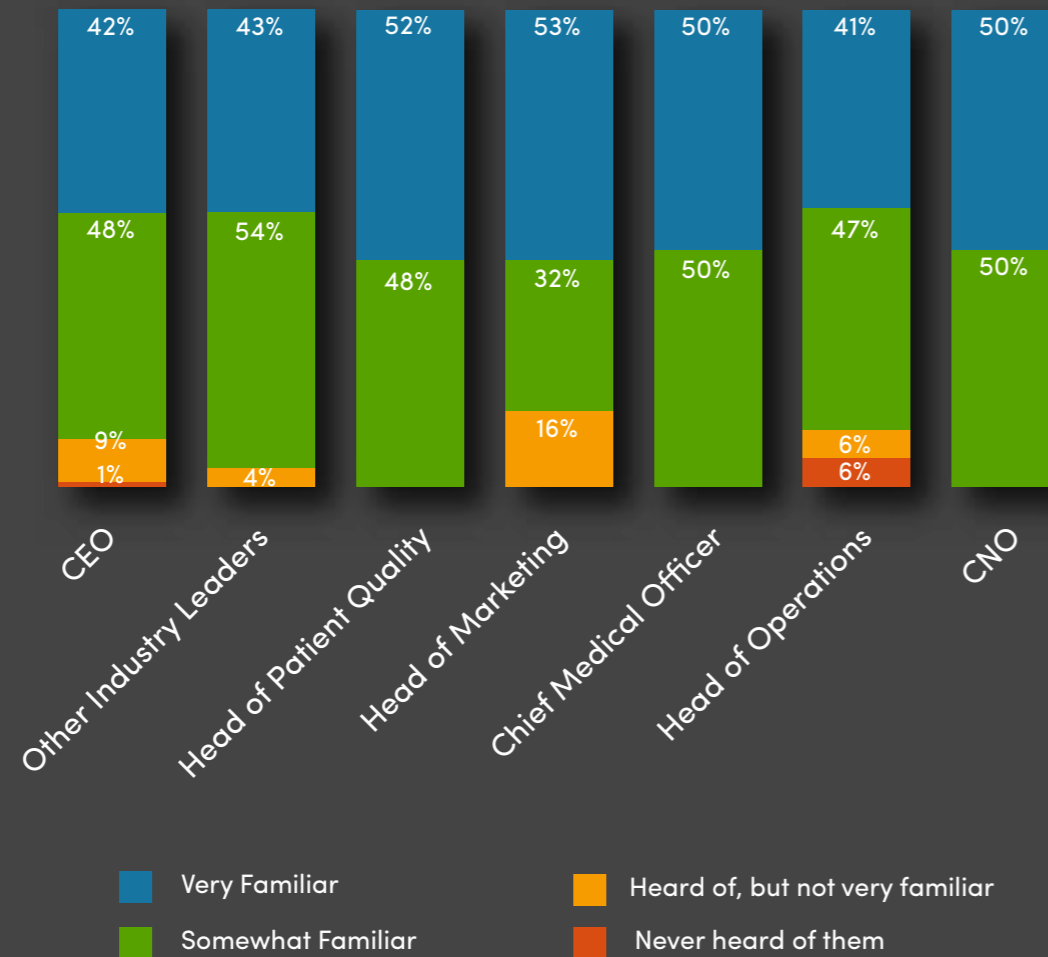
Cleveland Clinic – The Cleveland Clinic is like that quiet sibling you had that just always seemed to be doing good things. They are a steady force for good among hospital organizations in this country. They are well known, favorably viewed, and consistently in the top two or three in all categories – innovation, thought leadership, and high-quality care at sustainable costs.

Geisinger Health – Definitely not as big and well known as the previous organizations, but Geisinger is still considered a top hospital in the United States. They receive about the same rating when dealing with favorability, and usually end up in the fourth or fifth position in leader breakouts.

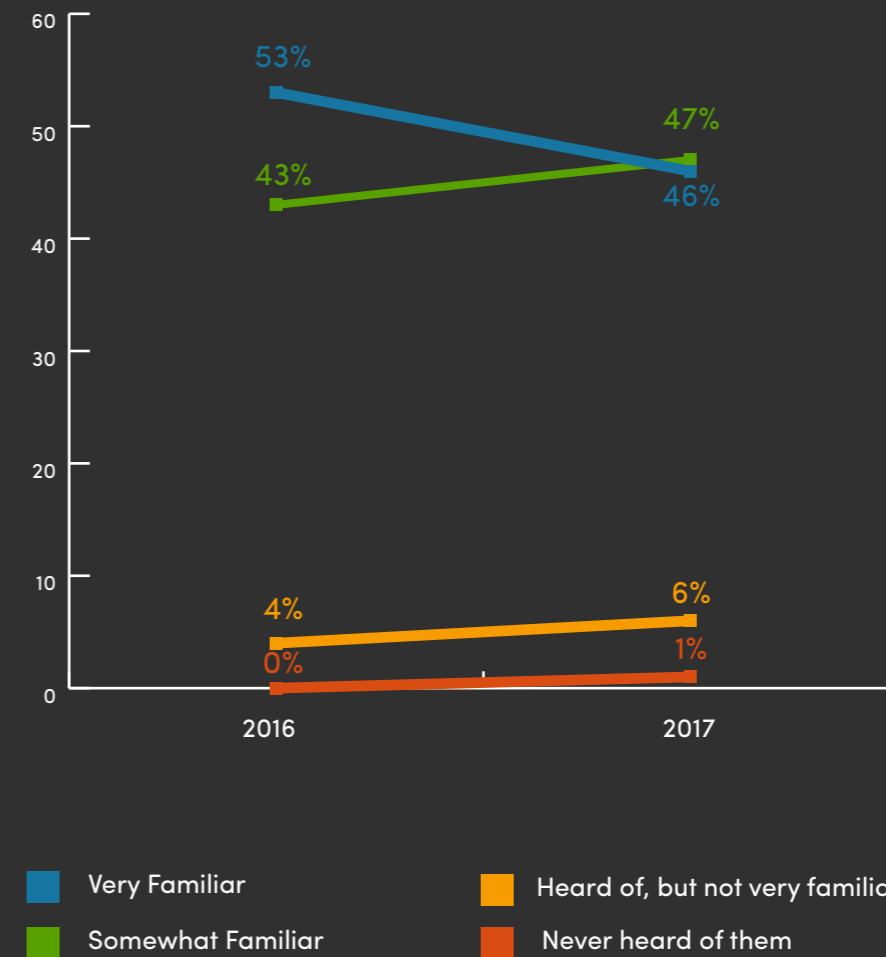
Intermountain Healthcare – Had we conducted our study just a few weeks later, Intermountain's familiarity numbers would likely look a lot different, given their recent landmark announcement to start their own drug company. Even though Intermountain Healthcare is more regionally focused than most of its peer group, they seem to punch above their weight, and have firmly established their spot among elite provider organizations.

Mayo Clinic – Brand Recognition

How familiar are you with Mayo Clinic?



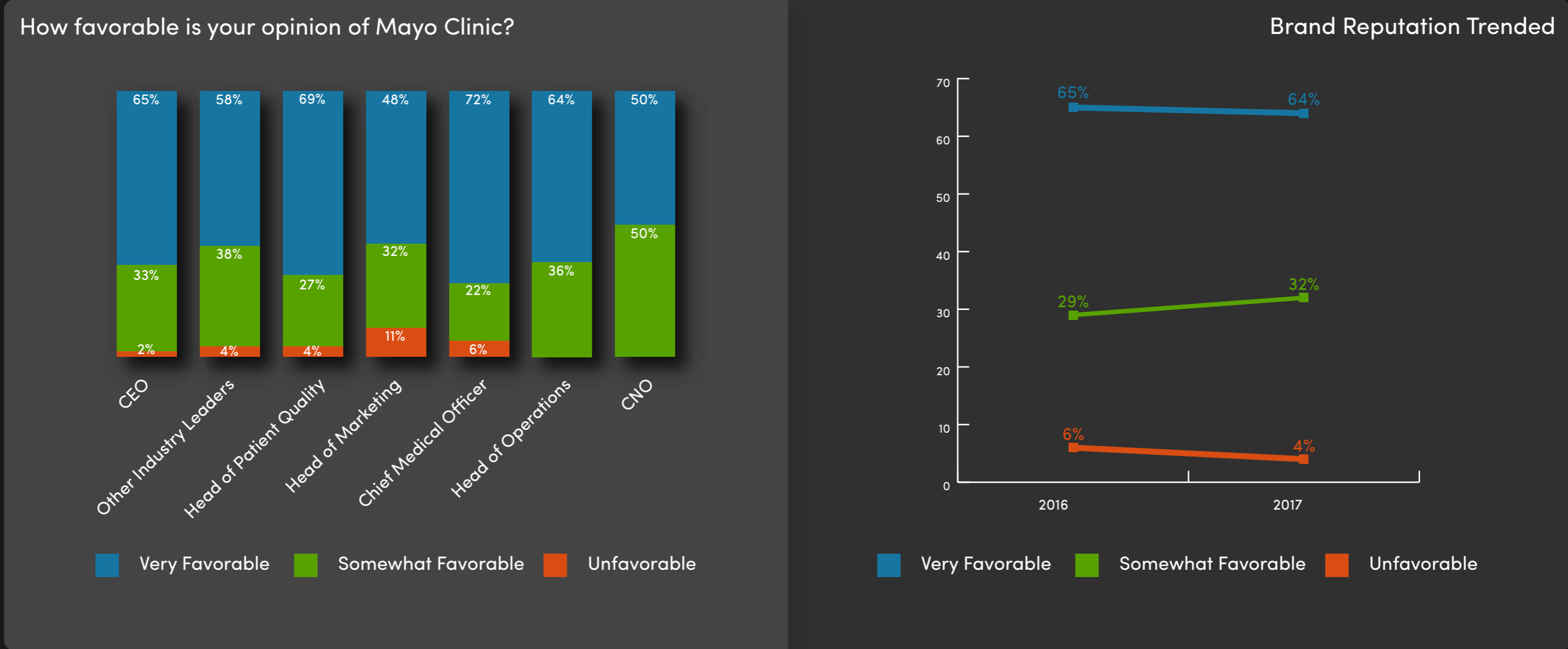
Brand Recognition Trended



As you may have seen by the earlier recognition graphs, Mayo Clinic is the most well-known hospital organization in the country. In 2016 there was not a single respondent who

answered “Never heard of them” and in 2017 only one or two could give that answer. Simply put, they are the most well-known healthcare provider organization in the US.

Mayo Clinic – Brand Reputation

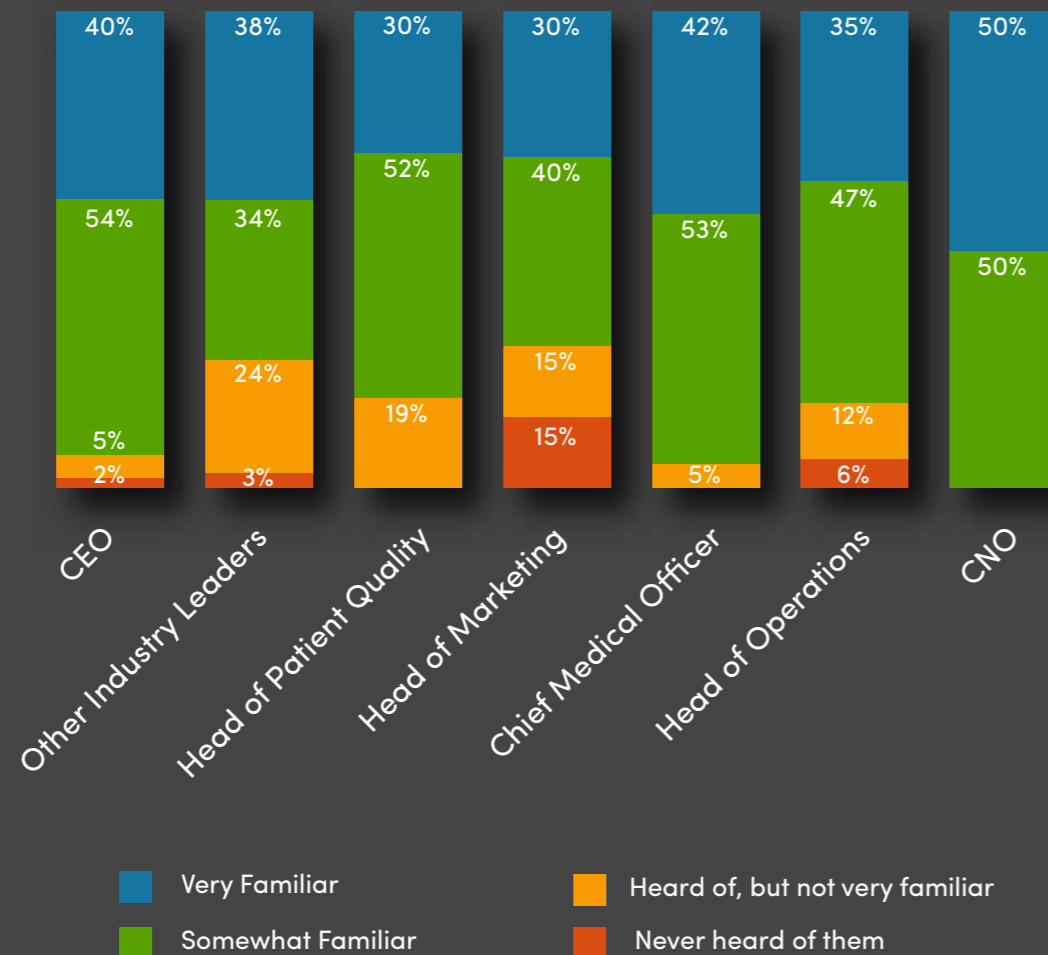


While being the most well-known hospital organization, they also have a great favorability perception among their peers. Even though their “very favorable” score dropped a touch, they

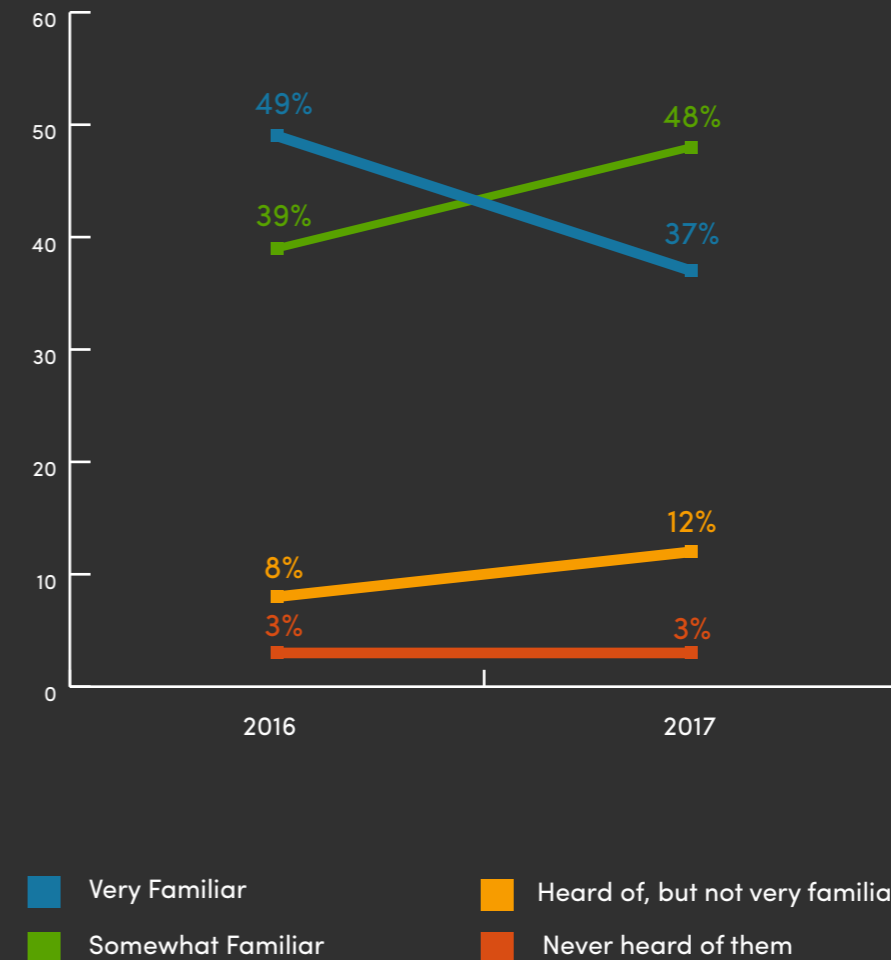
had a spike in “somewhat favorable” and a material reduction in “unfavorable” mentions. Overall, from 2016 to 2017, Mayo Clinic increased in net favorability amongst its peers.

Kaiser Permanente – Brand Recognition

How familiar are you with Kaiser?



Name Recognition Trended

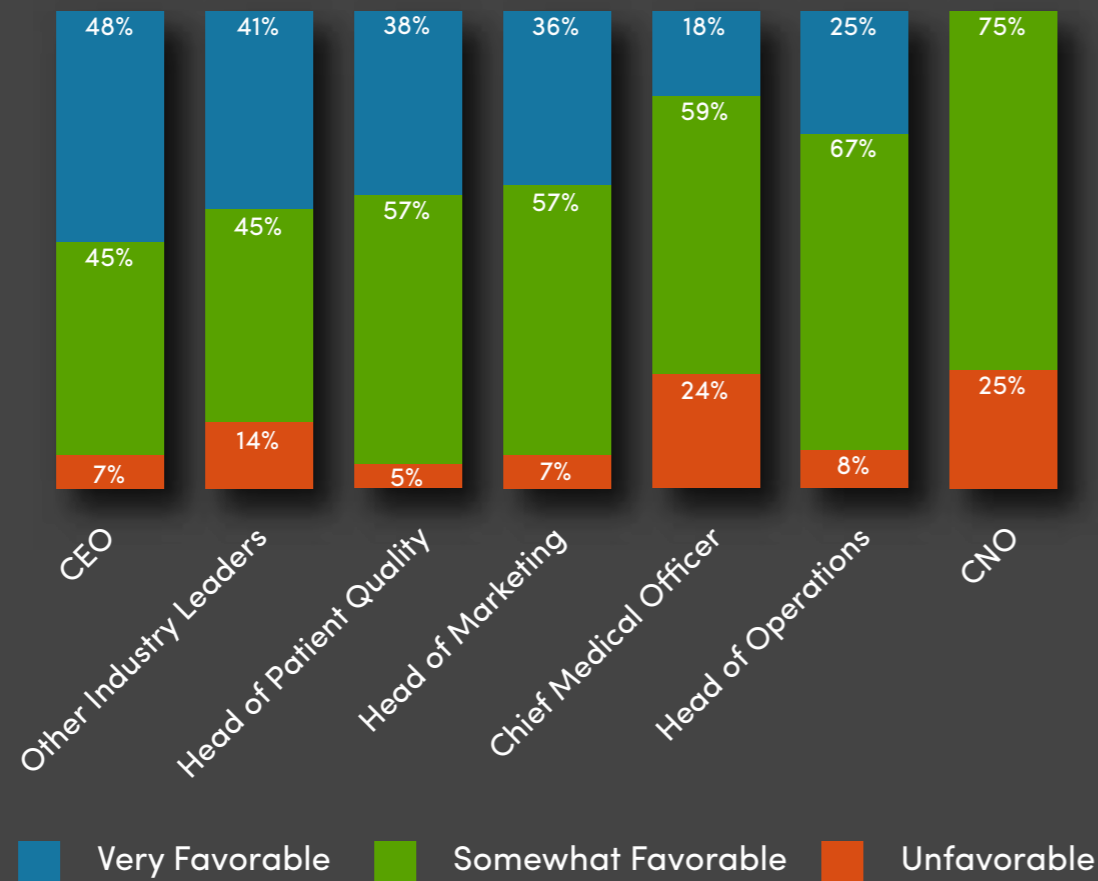


The increase of “heard of them but not very familiar” and “somewhat familiar” respondents might be enough to give Kaiser a net increase in recognition, but you still wonder what happened with the drop in those who are “very familiar”. It

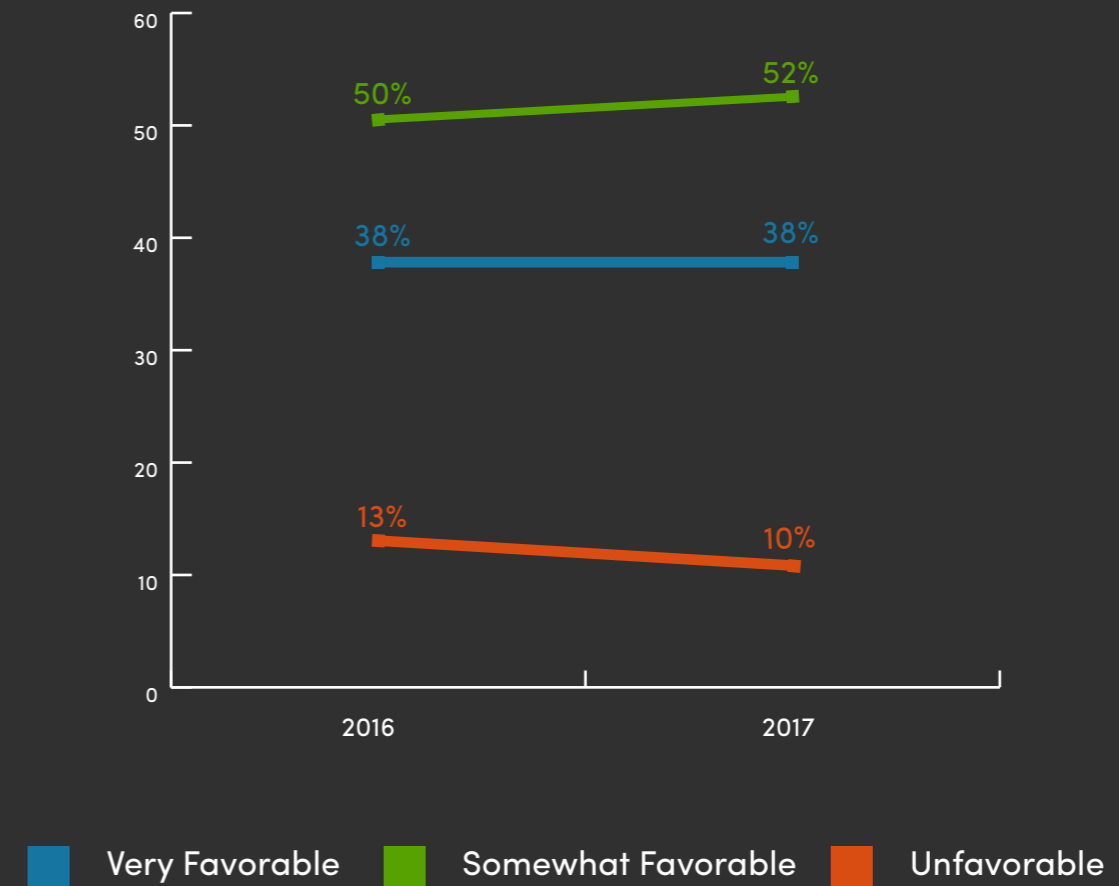
could mean a lack in marketing focus from the organization, or simply that those who responded this year fit a different demographic. Either way, we will continue to watch this trend and see what changes this coming year.

Kaiser Permanente – Brand Recognition

How favorable is your opinion of Kaiser?



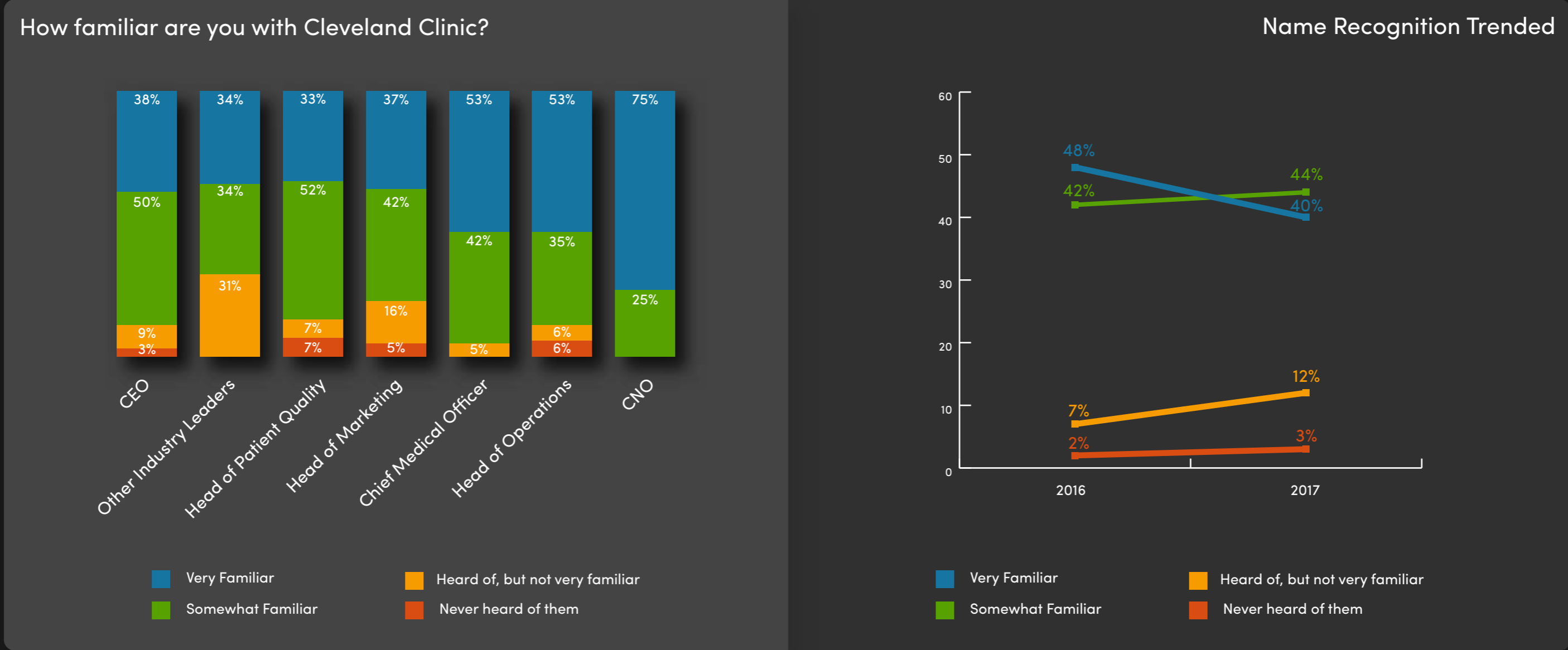
Brand Reputation Trended



Kaiser stayed fairly consistent (exactly consistent when dealing with reputation '16 vs '17) in most of its categories. While both years show Kaiser as having the highest unfavorable rate, they also were first by a large margin when asked who comes to

mind as an organization that delivers high quality at a sustainable cost. They also took second and third place in innovation and thought leadership (respectively).

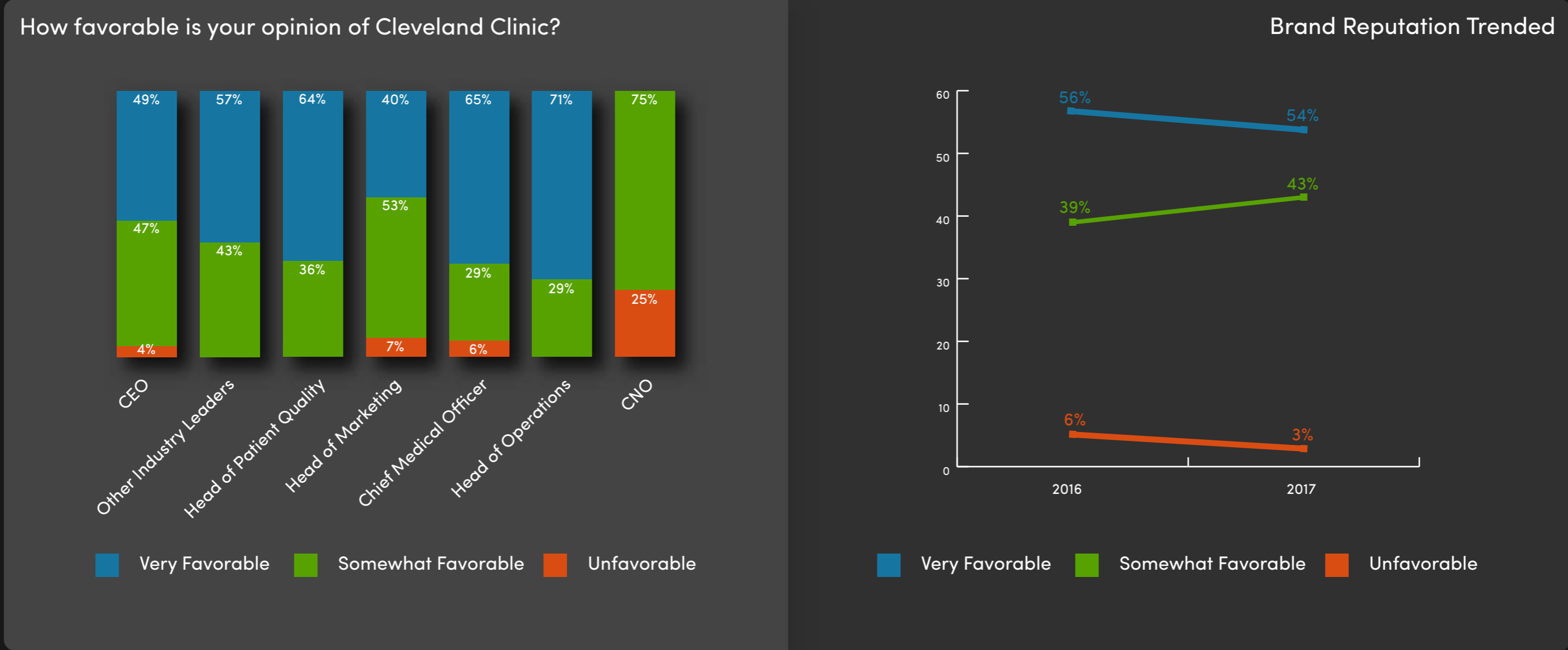
Cleveland Clinic – Brand Recognition



The Cleveland Clinic is like that less rambunctious sibling you had that just always seemed to be doing almost everything right. They are a steady force for good among hospital

organizations in this country. Despite their slight decrease in “very favorable” recognition, they always appear to be a well-known and trusted healthcare provider organization.

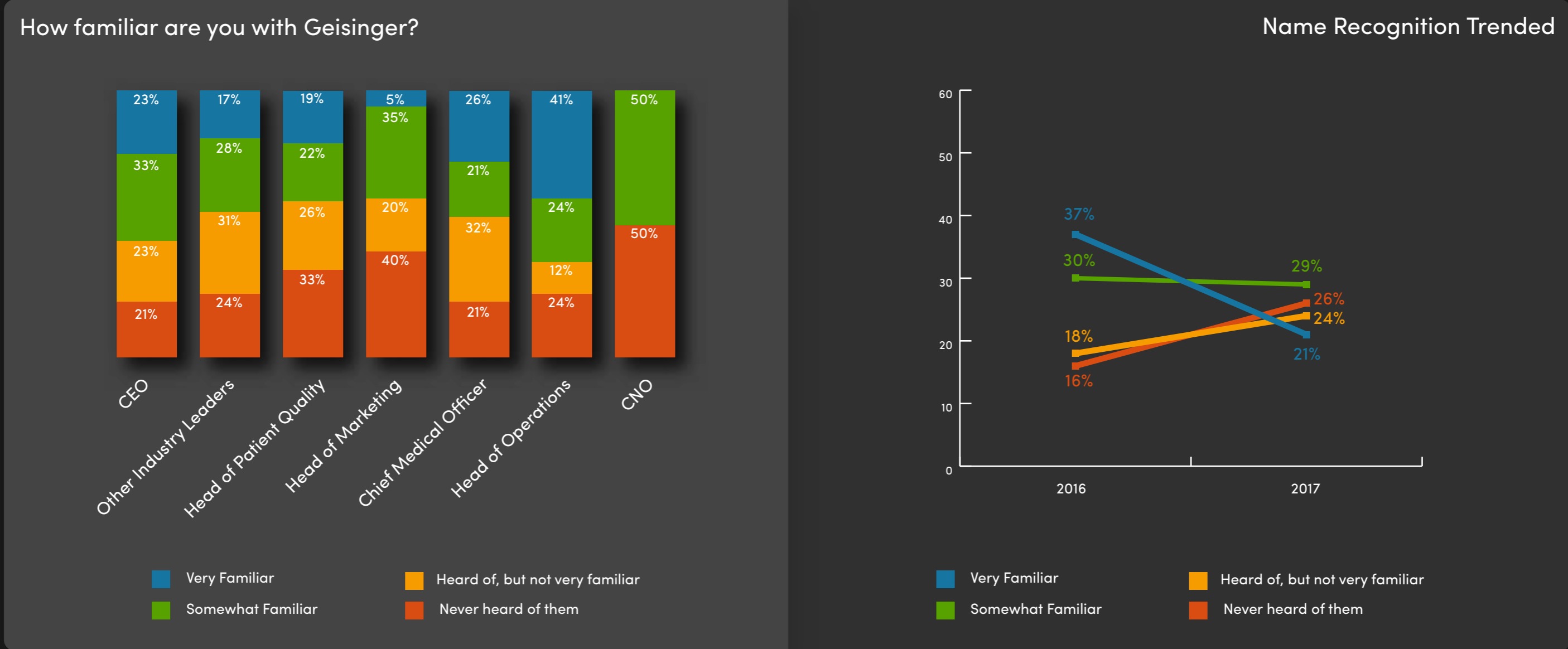
Cleveland Clinic – Brand Reputation 👍



Along with being well-known and favorably viewed, they are consistently in the top two or three when it comes to

innovation, thought leadership, and delivering high-quality care at sustainable costs.

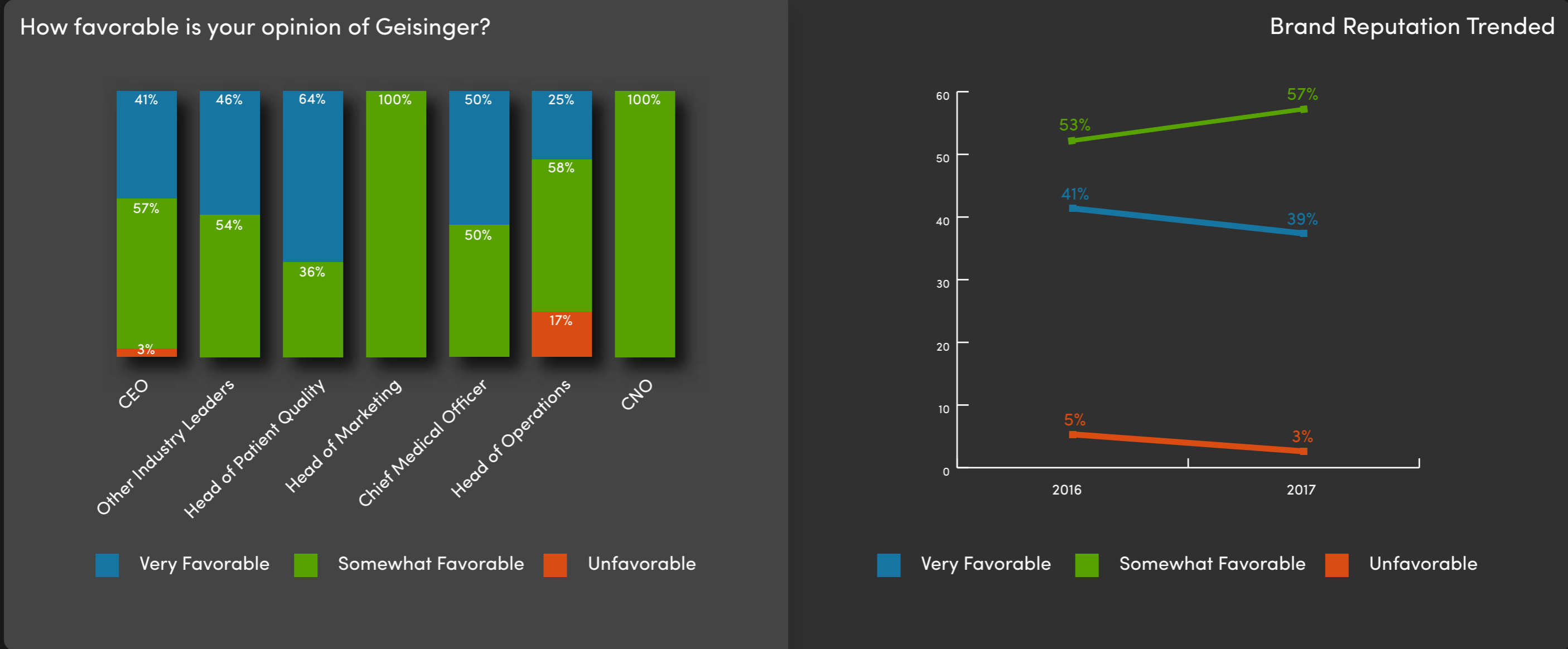
Geisinger Health- Brand Recognition



Geisinger, while not being as big or as well known as the previous organizations highlighted in this research, is still

considered a top hospital in the United States. The material decrease in peer awareness is something to be noted.

Geisinger Health - Brand Reputation 👍

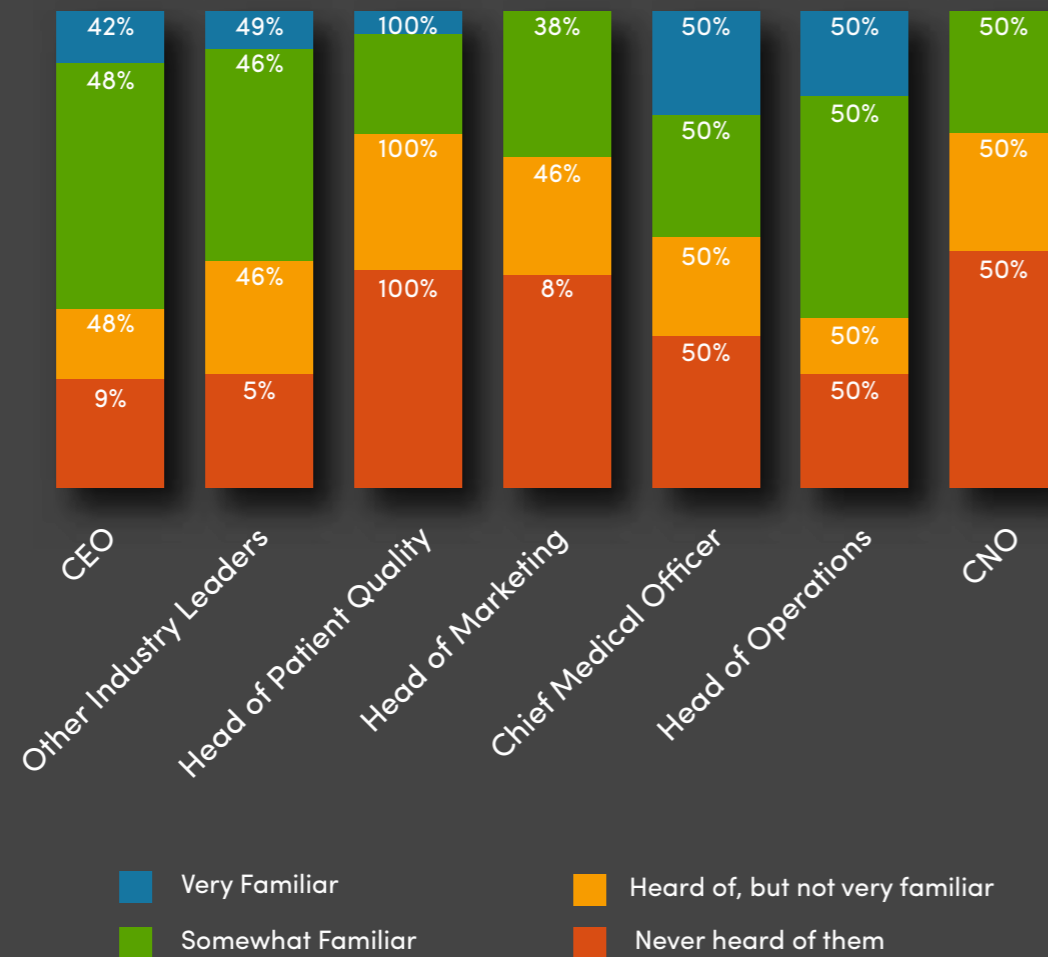


Being small, relatively speaking of course, doesn't mean Geisinger doesn't have respect from its peers. Only a scant 3%

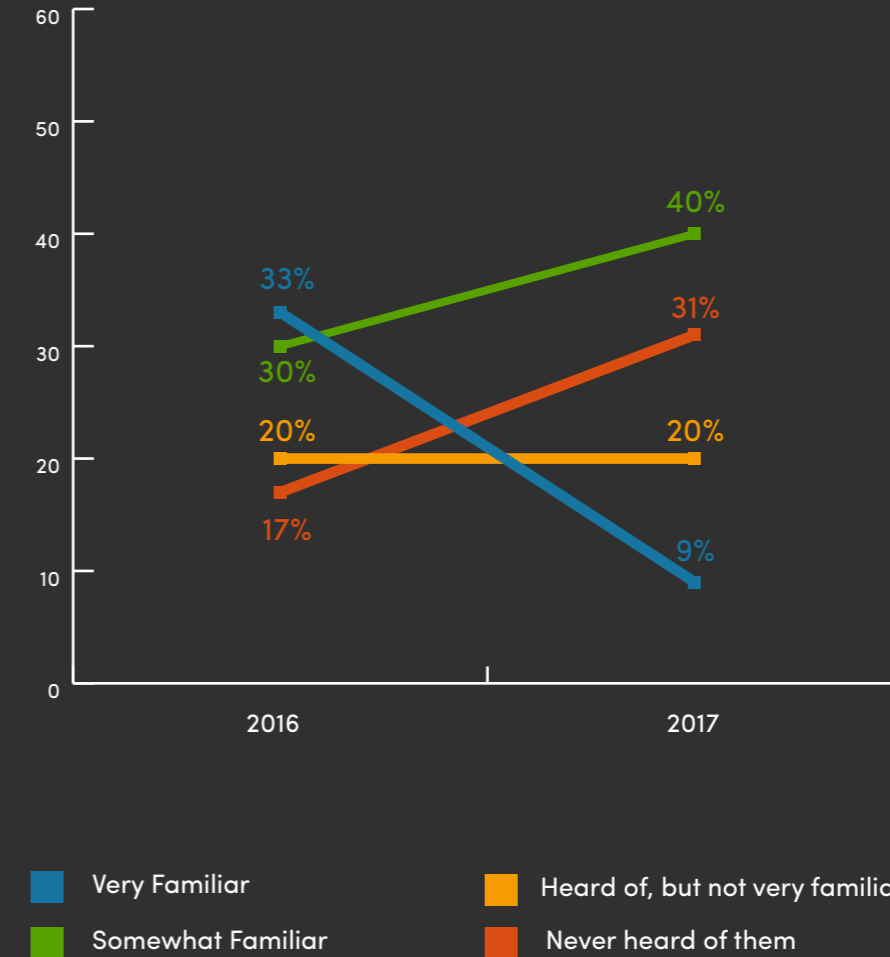
of its industry peers have an unfavorable opinion of it and, as such, they are to be commended.

Intermountain Healthcare – Brand Recognition

How familiar are you with Intermountain Healthcare?



Name Recognition Trended

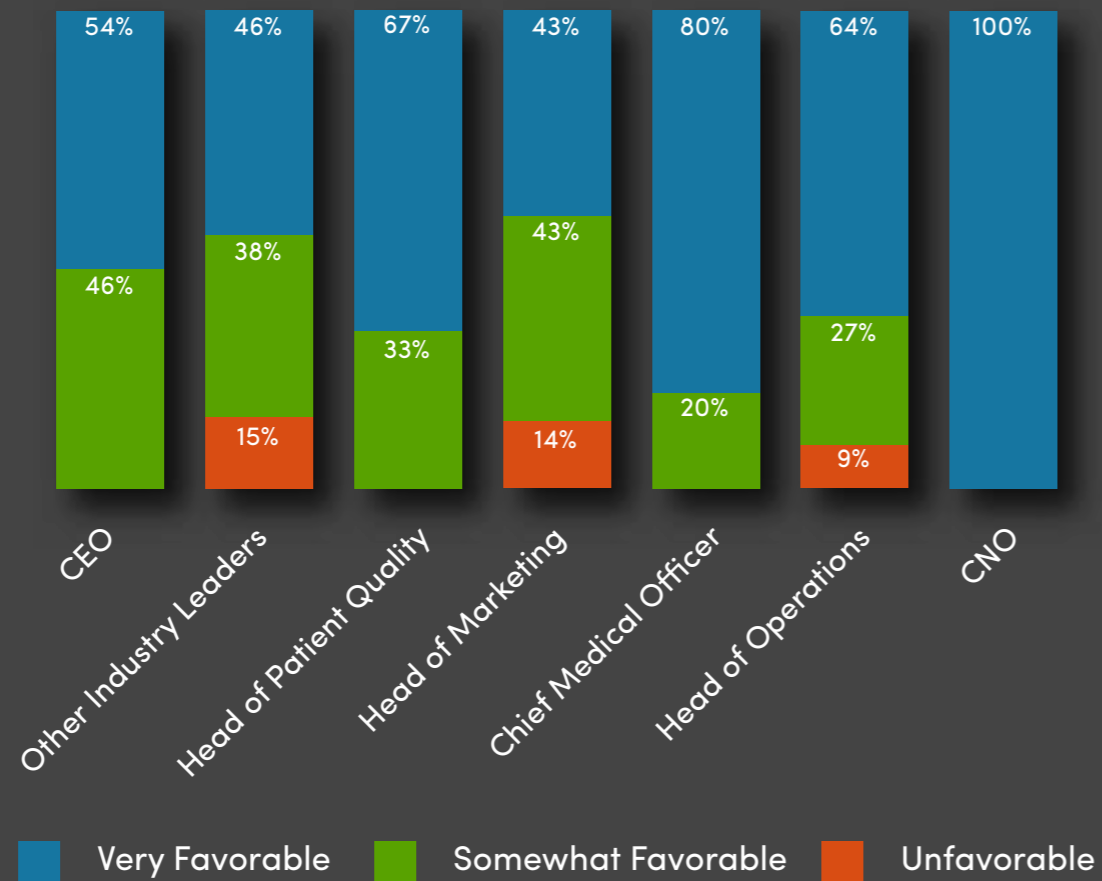


Had we conducted our research just a few weeks later, Intermountain’s recognition numbers would likely look a lot different given their recent landmark announcement to lead the charge in starting a new drug company along with

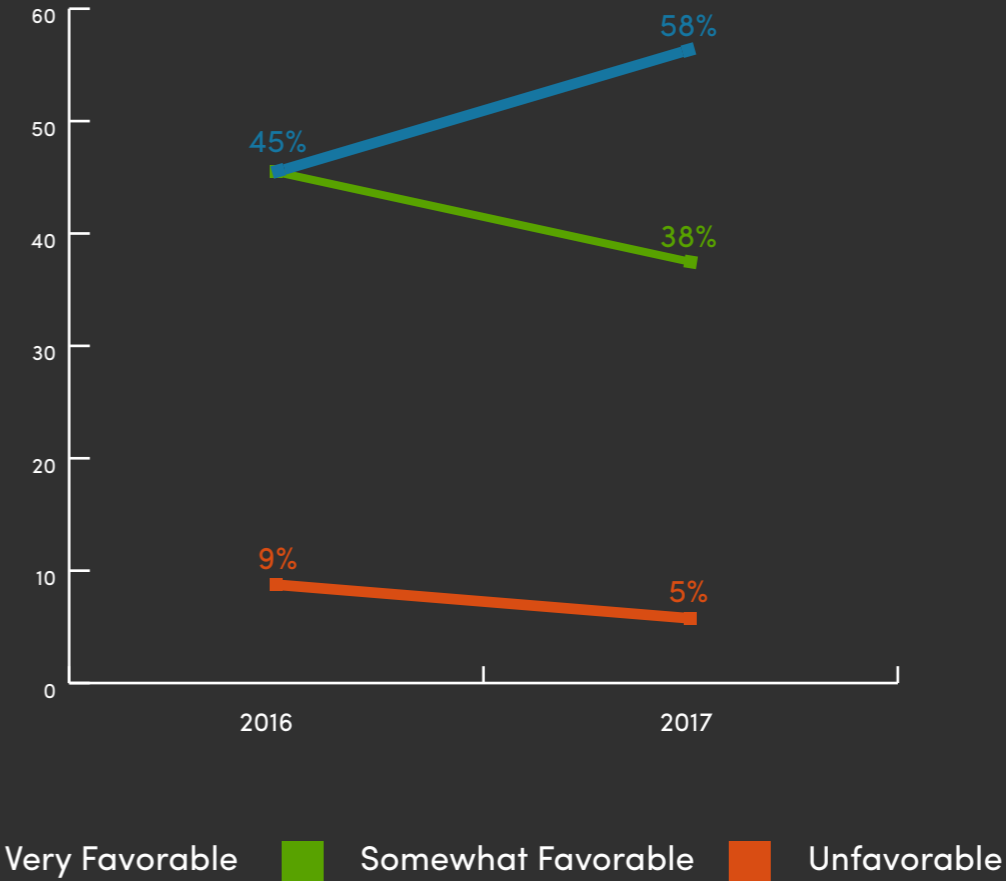
Ascension, Trinity, SSM, and the VA. Even though Intermountain has a more regional (and rural) focus than the other hospitals mentioned, they punch above their weight and have proven their spot among top hospital organizations.

Intermountain Healthcare – Brand Reputation

How favorable is your opinion of Intermountain Healthcare?



Brand Reputation Trended



If you look back at the overall breakouts of hospital brand reputation on page 8, Intermountain Healthcare was the only organization who increased their “very favorable”

score. That should say something about the marketing and good-will they continue to put out as an organization.

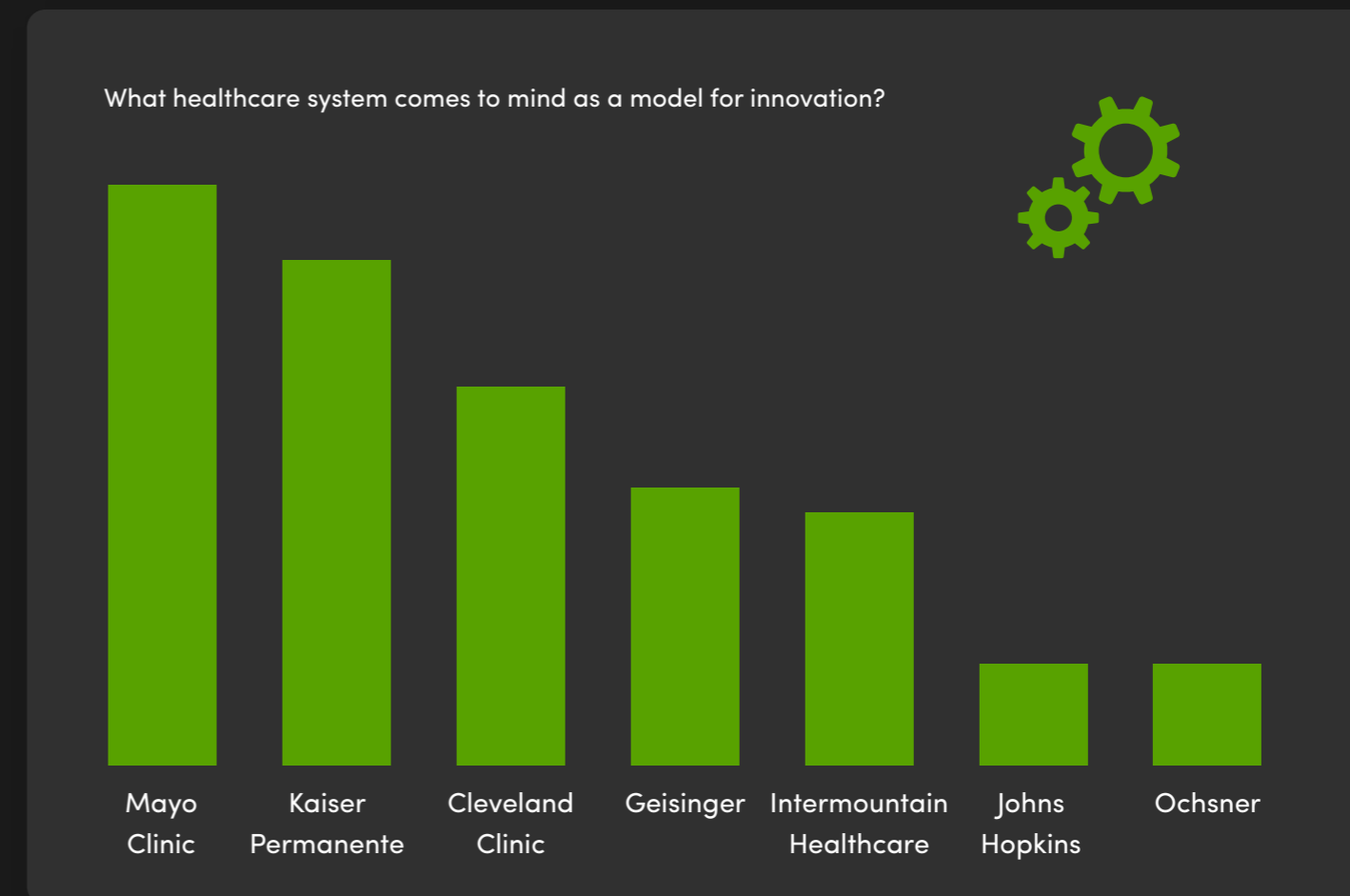
Conclusion

The top five contenders within the healthcare industry for innovation, thought leadership and delivering quality care at a sustainable cost are Mayo Clinic, Kaiser, Cleveland Clinic, Geisinger, and Intermountain Healthcare. This specific study focused on these three categories in order to gain knowledge on how these hospital organizations score overall in brand equity throughout the US in both 2016 and 2017 from a peer perspective.

In comparing the scores between the two surveys, all five of the hospital organizations show consistency in being true industry leaders. Even among such elite institutions, Mayo Clinic stands alone when it comes to peer reputation and peer recognition, as evidenced by the high volume of written-in responses from its peers in both 2016 and 2017.

An interesting innovation by a top health system from this report was announced while finalizing the research. Reaction Data is currently collecting critical research from healthcare provider organizations, health insurance companies, and pharmaceutical/life sciences firms to track

the groundbreaking announcement of a few key provider organizations (Intermountain, Ascension, Trinity, and SSM, with input from the VA), which are creating their own nonprofit drug company. Healthcare disruption just shifted into a higher gear. Buckle up...



The Full Data Set

If you are a customer of Reaction Data, you can click [here](#) to login and see the complete results.

If you have any questions about this report, or Reaction Data, feel free to email Taylor Madsen at tmadsen@reactiondata.com



Hospital Brand Equity