Hospital Brand Equity

Executive Brief - 2019
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Introduction

Recognition and reputation go a long way in today’s world. The ease of sharing and learning can help a small, seemingly insignificant newcomer become a disruptive force overnight or cause the rapid downfall of a previously-dominant player.

We had 341 healthcare provider leadership participants share insights with us using our Research Cloud®, regarding which hospital organizations are top of mind for them.

We asked which provider organization comes to mind as being a model for innovation, providing quality care at sustainable cost, and acts as a thought leader on topics related to healthcare transformation. We gave no prompts; we simply allowed each participant to select whichever organization they wished.

Demographics

N = 341

Participants’ Top Facility Types

<table>
<thead>
<tr>
<th>Facility Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Hospital</td>
<td>48%</td>
</tr>
<tr>
<td>Critical Access Hospital</td>
<td>21%</td>
</tr>
<tr>
<td>Specialty Clinic</td>
<td>10%</td>
</tr>
<tr>
<td>IDN</td>
<td>5%</td>
</tr>
<tr>
<td>Academic Medical Center</td>
<td>4%</td>
</tr>
<tr>
<td>Rehabilitation Hospital</td>
<td>2%</td>
</tr>
<tr>
<td>Children’s Hospital</td>
<td>2%</td>
</tr>
<tr>
<td>Other *</td>
<td>8%</td>
</tr>
</tbody>
</table>

*Family Practice, Long Term Care, Home Health Hospice, Imaging Center, Cancer hospital, Mental health

Participants’ Top Titles

- 48% Department Head
- 32% C-Level Executives
- 20% Department Staff

Department Heads included: VP of Operations, VP of Finance, Director of Nursing, IT Director etc.
C-Level Executives included: CEO, COO, CMIO, CIO, CMO etc.
Department Staff included: Operations Manager, Practice Manager, Nurse Manager, Finance Manager, Quality Manager etc.

Participants’ Region

- 29% Southeast
- 24% Northeast
- 24% Midwest
- 12% Southwest
- 11% West
Innovators are the ones who move their industry forward. There are lots of great organizations that provide amazing patient care but don’t take the risks required to truly innovate. They prefer to sit back and wait until new methods are tried and tested before adopting and implementing them in their own organization. The organizations below are those that their peers across the country mentioned as being the most innovative.

What healthcare system comes to mind as a model for innovation?

- Mayo Clinic: 14%
- Cleveland Clinic: 12%
- Intermountain Healthcare: 10%
- Kaiser Permanente: 9%
- Geisinger Health: 8%
- Johns Hopkins: 4%
- Advocate Health: 2%
- Virginia Mason: 2%

Percent of responses coming from participants within, or adjacent to, the same state the provider organization is located:

- Intermountain Healthcare: 18%
- Mayo Clinic: 22%
- Kaiser Permanente: 27%
- Geisinger Health: 31%
- Cleveland Clinic: 40%
In this section, we see essentially the same organizations showing up, except for HCA taking the place of Virginia Mason. You’ll notice, however, that the order in which these organizations show up has changed. Kaiser Permanente was fourth on innovation, but first by a decent margin in delivering care at sustainable costs.

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

Percent of responses coming from participants within, or adjacent to, the same state the provider organization is located:
Top Thought Leaders

While the other two categories dealt more with the internal operations of a hospital, thought leadership is more of an outward function. This points to which organizations others see as an example to follow and which are leading the way forward in healthcare. It's interesting to note that outside of the usual suspects, Virginia Mason makes it back into the mix, and Ascension makes its first appearance.

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

![Bar chart showing thought leaders with percentages: Mayo Clinic 15%, Cleveland Clinic 14%, Kaiser Permanente 11%, Intermountain Healthcare 8%, Geisinger Health 6%, Ascension Health 4%, Virginia Mason 3%]

Percent of responses coming from participants within, or adjacent to, the same state the provider organization is located:

- Intermountain Healthcare: 11%
- Kaiser Permanente: 33%
- Mayo Clinic: 35%
- Cleveland Clinic: 40%
- Geisinger Health: 43%
Total aggregate mindshare represents all responses from the previous questions about innovation, quality of care, and thought leadership.

*Total mentions from the previous charts including innovation, quality care at sustainable cost, and thought leadership:

Overall aggregate

<table>
<thead>
<tr>
<th>Hospital</th>
<th>Mindshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mayo Clinic</td>
<td>12%</td>
</tr>
<tr>
<td>Cleveland Clinic</td>
<td>12%</td>
</tr>
<tr>
<td>Kaiser Permanente</td>
<td>11%</td>
</tr>
<tr>
<td>Intermountain Healthcare</td>
<td>9%</td>
</tr>
<tr>
<td>Geisinger Health</td>
<td>6%</td>
</tr>
</tbody>
</table>

Home area responses removed

<table>
<thead>
<tr>
<th>Hospital</th>
<th>Mindshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mayo Clinic</td>
<td>10%</td>
</tr>
<tr>
<td>Kaiser Permanente</td>
<td>10%</td>
</tr>
<tr>
<td>Intermountain Healthcare</td>
<td>9%</td>
</tr>
<tr>
<td>Cleveland Clinic</td>
<td>8%</td>
</tr>
<tr>
<td>Geisinger Health</td>
<td>5%</td>
</tr>
</tbody>
</table>

*Total mentions from the previous charts including innovation, quality care at sustainable cost, and thought leadership: Responses that came from states within, or adjacent to, where the provider organization is located have been removed for this graph.
There are two aspects that go into the overall brand equity of an organization - recognition and reputation. How aware are others of your organization? Do your outcomes speak for themselves? Have you done a good job enhancing your reputation among your peers?

In the following section, we look at the overall familiarity and favorability of each of the top five provider organizations from the previous section. Participants related how familiar they were with each organization and how favorable their opinion is of the organizations they selected.
Brand Equity

Percent of participants with a very favorable view of each organization:

- Cleveland Clinic: 62%
- Mayo Clinic: 61%
- Intermountain Healthcare: 51%
- Kaiser Permanente: 31%
- Geisinger Health: 44%

Percent of participants who have never heard of these organizations:

- Mayo Clinic: 0%
- Cleveland Clinic: 9%
- Kaiser Permanente: 9%
- Geisinger Health: 36%
- Intermountain Healthcare: 39%
**Mayo Clinic**

**Familiarity**

- Somewhat Familiar: 11%
- Very Familiar: 51%
- Have heard of them, but not very Familiar: 38%
- Never heard of them: 1%

**Opinion**

- Very favorable: 61%
- Somewhat favorable: 1%
- Somewhat unfavorable: 1%
- Very unfavorable: 37%

**Most Familiar**

Department Heads

Of those who responded that they are very familiar with Mayo Clinic, **45%** of them fall into the “Department Head” category.

**Most Favorable**

Department Heads

Of those who responded that they have a very favorable opinion of Mayo Clinic, **50%** of them fall into the “Department Head” category.
Cleveland Clinic

Familiarity

- Somewhat Familiar: 9%
- Very Familiar: 14%
- Have heard of them, but not very Familiar: 36%
- Never heard of them: 41%

Most Familiar

- C-Level Executives: Of those who responded that they are very familiar with Cleveland Clinic, 39% of them fall into the “C-Level Executives” category.

Opinion

- Very favorable: 62%
- Somewhat favorable: 1%
- Somewhat unfavorable: 37%
- Very unfavorable: 1%

Most Favorable

- Department Heads: Of those who responded that they have a very favorable opinion of Cleveland Clinic, 52% of them fall into the “Department Head” category.
Kaiser Permanente

Familiarity

- 44% Somewhat Familiar
- 30% Very Familiar
- 9% Have heard of them, but not very Familiar
- 17% Never heard of them

Most Familiar

Of those who responded that they are very familiar with Kaiser Permanente, 48% of them fall into the “Department Head” category.

Opinion

- 53% Very favorable
- 31% Somewhat favorable
- 11% Somewhat unfavorable
- 5% Very unfavorable

Most Favorable

Of those who responded that they have a very favorable opinion of Kaiser Permanente, 55% of them fall into the “Department Head” category.
Intermountain Healthcare

**Familiarity**

- Somewhat Familiar: 32%
- Very Familiar: 9%
- Have heard of them, but not very Familiar: 20%
- Never heard of them: 20%

**2018**

Of those who responded that they are very familiar with Intermountain Healthcare, **53%** of them fall into the “C-Level Executives” category.

**Opinion**

- Very favorable: 51%
- Somewhat favorable: 48%
- Somewhat unfavorable: 1%
- Very unfavorable: 0%

**2018**

Of those who responded that they have a very favorable opinion of Intermountain Healthcare, **49%** of them fall into the “C-Level Executives” category.
Geisinger Health

**Familiarity**

- Somewhat Familiar: 18%
- Very Familiar: 36%
- Have heard of them, but not very Familiar: 18%
- Never heard of them: 28%

2018

**Most Familiar**

Department Heads
Of those who responded that they are very familiar with Geisinger Health, 46% of them fall into the “Department Head” category.

**Opinion**

- Very favorable: 46%
- Somewhat favorable: 9%
- Somewhat unfavorable: 1%
- Very unfavorable: 1%

2018

**Most Favorable**

Department Heads
Of those who responded that they have a very favorable opinion of Geisinger Health, 47% of them fall into the “Department Head” category.
Healthcare provider organizations take great pride in how they are perceived in the communities they serve. We are fortunate to have institutions that go to extraordinary lengths to provide excellent care at reduced cost.

In addition to benefitting healthcare in their own communities, the efforts of these select organizations also attract national attention – particularly among peer organizations. While some are known for one thing or another, in this national brand study five organizations appear in all three key areas. In terms of the measures reflected in this data, the work of these organizations creates name recognition and a reputation for excellence that allows them to compete effectively in their respective markets and beyond.

It is important to remember these contextual underpinnings: Participants represent healthcare institutions from coast to coast; of the thousands of hospitals to consider locally and regionally, five organizations stand out nationally.
Reaction Data is the first of its kind - a Research as a Service company that serves healthcare provider organizations, payers, vendors, and life sciences companies. Research as a Service is the combination of our proprietary Research Cloud® platform, cutting-edge best practices, and massive network of healthcare leaders to get critical insights incredibly fast.

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