

# A healthy brand requires a balance between physician and health system brands

SYSTEM-DOMINANT BRAND

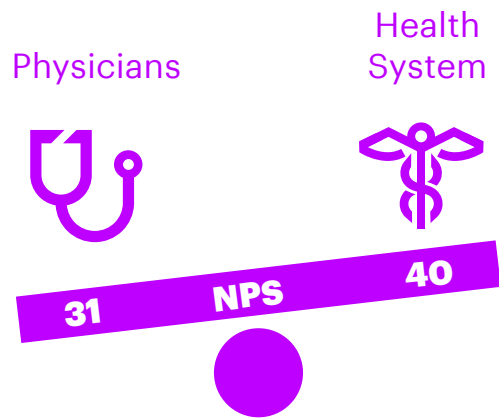
MATCHED-STRENGTH BRAND

PHYSICIAN-DOMINANT BRAND

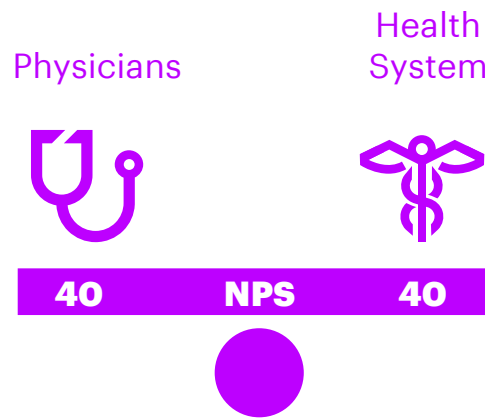
Weaker Physicians

Healthy Brand

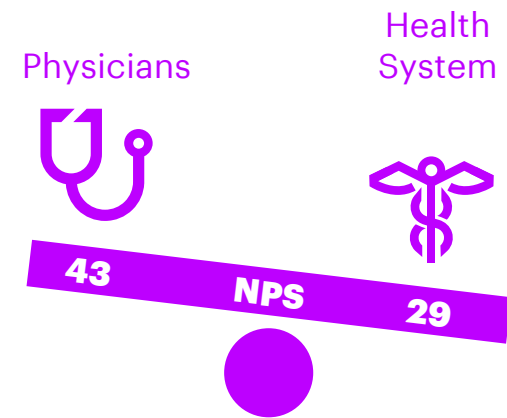
Weaker Health System



When system brand dominates, patients switch more, particularly millennial consumers.



Balanced brands see higher retention, acquisition, and profit margins.



When system brand is weaker, patient acquisition suffers most.