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Global Top 250 Hospitals 2023

Ranking the Most Reputable Academic Medical Centres
January 2023

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About Brand Finance.

Brand Finance is the world's leading brand valuation consultancy.

We bridge the gap between marketing and finance

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For more than 25 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We quantify the financial value of brands

We put thousands of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish over 100 reports annually.

We offer a unique combination of expertise

Our teams have experience across a wide range of disciplines from marketing and market research, to brand strategy and visual identity, to tax and accounting.

We pride ourselves on technical credibility

Brand Finance is a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, and the first brand valuation consultancy to join the International Valuation Standards Council.

Our experts helped craft the internationally recognised standards on Brand Valuation – ISO 10668 and Brand Evaluation – ISO 20671. Our methodology has been certified by global independent auditors – Austrian Standards – as compliant with both, and received the official approval of the Marketing Accountability Standards Board.



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Foreword.



David Haigh
Chairman & CEO,
Brand Finance

Building a strong brand is a unique challenge for Academic Medical Centres, because the structure of an AMC – offering patient treatment, medical research, and education – means that a wide range of stakeholders need to be considered.

A strong brand is essential to developing a sustainable and successful organization through assuring patients and families; attracting exceptional doctors, top students applications, and prominent research staff; enabling proud employees, and preferable research publication; garnering support from donors and respect from regulators, governments, and insurers; and to develop a strong network of partners around the world.

Among the world's top AMCs, the stakeholder audience expands beyond the local area as influence reaches around the world – although many patients may still be local, the research and procedures developed will be relevant globally, and top medical staff will travel and study to bring the reputation and brand to wider audiences.

This year Brand Finance has undertaken a new study into the brand strength of the world's top AMCs, incorporating all the factors that reflect the development of an AMC brand, the perceptions of key stakeholders, and the benefits that a strong brand brings to the organization.

The objective of the study is to create a way to holistically understand what makes the world's top academic medical centres leaders in their field. It was designed through intensive collaboration with stakeholders of AMCs around the world, and a one-of-a-kind market research study to understand the real perceptions of healthcare professionals globally.

The results allow transparent and detailed understanding of how each AMC is perceived to be performing across a range of critical metrics, with insights that can be actionable and enable clear targets for growth.

If you want to help build a stronger brand, or if you want to better understand how to communicate or gain recognition of achievements of your brand, please contact the Brand Finance team and I anytime. I look forward to the conversation and helping to build a more successful future for your brand.

A stack of papers is shown in a grayscale, slightly blurred perspective. A dark blue rectangular overlay is positioned in the upper left quadrant, containing the text 'Executive Summary.' in a bold, white, sans-serif font. The papers in the background are stacked and slightly offset, creating a sense of depth and volume.

Executive Summary.

Mayo Clinic sets the pace at the top of first global Academic Medical Center ranking.

- + **Mayo Clinic Health System** is world's leading Academic Medical Centre
- + First of its kind study ranks the brand strength of the world's leading Academic Medical Centres
- + All-American top three in the ranking highlights the region's dominance
- + Medical centres of prominent universities benefit from increased awareness and familiarity
- + Specialist Academic Medical Centres achieve high performance

Executive Summary.



Mayo Clinic Health System of the United States is the strongest brand in the Brand Finance AMC 100 2023 report, with a Brand Strength Index (BSI) score of 85.1 out of 100. This report is based on original research conducted into the perception of Academic Medical Centres (AMCs) throughout the world by key stakeholders.


Mayo Clinic Health System has successfully integrated clinical practice, education, and research, providing a first-rate patient experience and a highly trusted partner for healthcare. This is reflected in high scores across the board in the patient treatment, research, and teaching categories in Brand Finance's research. However, what really sets Mayo Clinic Health

System apart from its competitors is its extremely high local, regional, and international awareness and familiarity, scoring the highest in these in the ranking.

The top of the ranking is dominated by Academic Medical Centres from North America, which accounts for seven of the top ten AMCs. Almost all score highly in familiarity and awareness around the world, suggesting that North American AMCs have a greater understanding of the importance of brand equity in building a strong brand in conjunction with their offering of patient care, clinical research and teaching capabilities, in comparison to counterparts elsewhere. Resultantly, the USA has cemented its position as a global hub for medical excellence.

Top 10 Strongest AMC Hospitals

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<p>1</p>  <p>MAYO CLINIC</p> <p>85.1</p>	<p>2</p>  <p>Massachusetts General Hospital Founding Member, Mass General Brigham</p> <p>80.4</p>	<p>3</p>  <p>Stanford MEDICINE</p> <p>79.8</p>	<p>4</p>  <p>CHARITÉ UNIVERSITÄTSMEDIZIN BERLIN</p> <p>79.1</p>	<p>5</p>  <p>ALL INDIA INSTITUTE OF MEDICAL SCIENCES हरिद्वारा चतुर्धर संस्थापनम्</p> <p>79.0</p>
<p>6</p>  <p>Dana-Farber Cancer Institute</p> <p>77.7</p>	<p>7</p>  <p>SickKids®</p> <p>77.6</p>	<p>8</p>  <p>Singapore General Hospital SingHealth</p> <p>77.1</p>	<p>9</p>  <p>JOHNS HOPKINS MEDICINE</p> <p>77.0</p>	<p>10</p>  <p>UCSF Health</p> <p>76.8</p>

Massachusetts General Hospital was the second strongest brand in the ranking with a brand strength index of 80.4. Connected to Harvard Medical School and having the largest hospital-based research program in the USA, Massachusetts General Hospital has a long history of medical innovation which continues today through its vaccine research centre. This, coupled with its strong culture of diversity and collaboration to serve all, has allowed it to build a very high level of brand equity amongst patients and researchers alike.

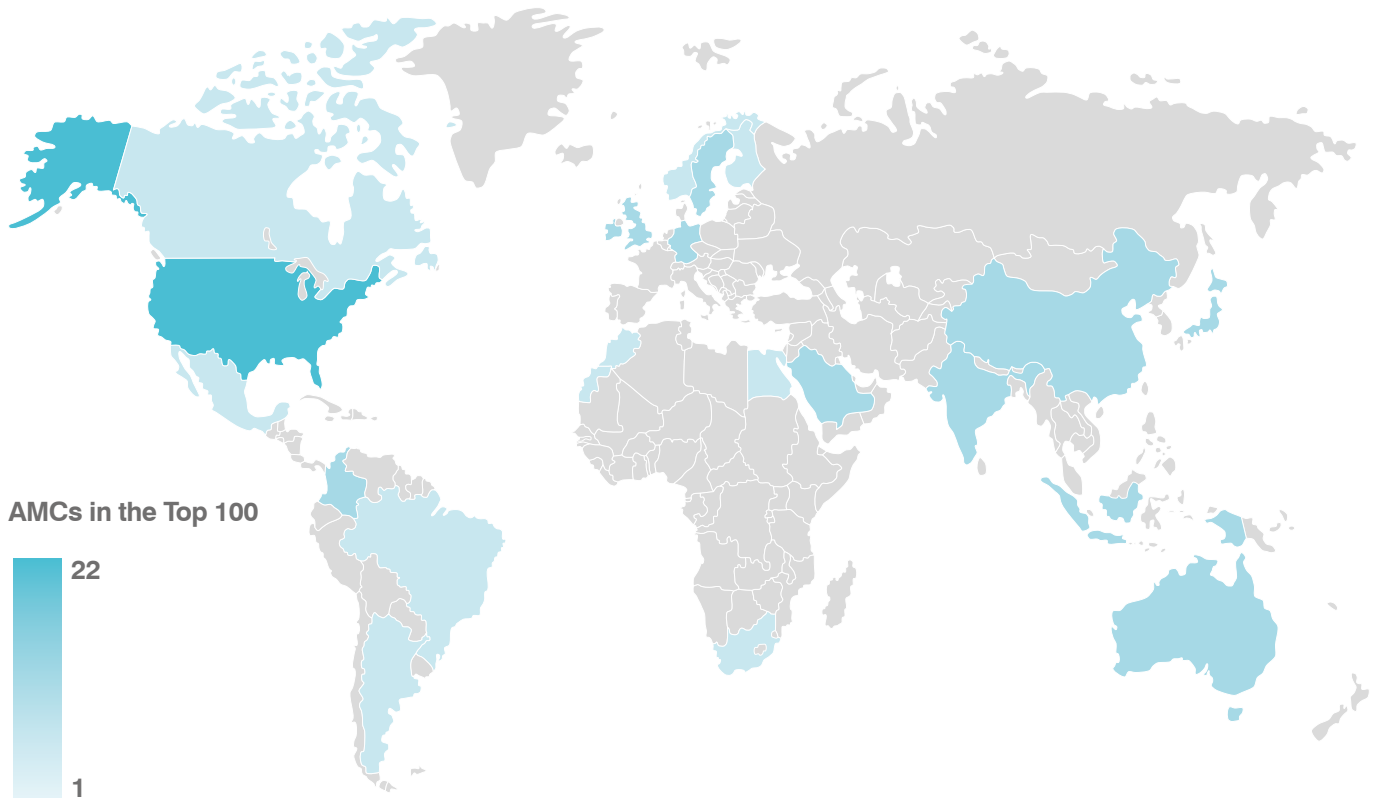
Following Massachusetts General Hospital was **Stanford University Medical Centre** at 3rd in the ranking, while **Dana-Farber Cancer Institute** (6th), **SickKids** (7th), **Johns Hopkins Hospital** (9th), and **UCSF Medical Centre** (10th) all made the top ten, demonstrating North America's dominance at the top of the ranking.

Charité in Berlin, Germany, is the highest ranked Academic Health Centre in Europe at 4th. Comprising of over 100 different clinics and departments, Charité has an extremely broad offering to patients, scoring second highest in the patient treatment metric in Brand Finance's research. Several high-profile politicians have been treated at Charité over the last few years, including German Chancellor Angela Merkel and Russian opposition leader Alexei Navalny following his poisoning in 2020. This has likely increased its familiarity and awareness around the world.



Large number of US AMCs in Top 100

© Brand Finance 2023



The top ranked Asian AMC was the **All India Institutes of Medical Sciences (AIIMS)**, in 5th place. AIIMS is a highly reputed group of public medical universities for higher education for doctoral sciences. AIIMS's position at the top of the ranking was significantly better than other Indian AMCs. The only other Indian AMC included in the ranking was **Christian Medical College Vellore**, which is in 27th position.

Since its establishment in 1956, **AIIMS** has grown across different states in India with proposals for new locations under the Indian government's Atmanirbharta scheme to display self-sufficiency in the field of medical sciences and technology. The medical centre's main aim is to conduct research in medical and related sciences as well as training medical professors and academics to ensure a high standard of healthcare education with community-based teaching and research.

In addition to being the top AMC in India, Brand Finance's research also found **AIIMS** to be a leader in teaching, being ranked in the top three AMCs in this category. Its primary emphasis on research and

specialized training facilities has primarily driven this result, with key stakeholders recognising that AIIMS has become a global leader in teaching. AIIMS offers a basic medical course at bachelor's level and further specialisation at master's level. However, it is the 'superspecialities' that it offers at higher master's level (including specialities in areas such as cardiothoracic and vascular surgery) that has further contributed to its global reputation as a first-class teaching AMC.



Medical centres of prominent universities benefit from increased awareness and familiarity

Several Academic Medical Centres linked with well-known universities in the USA and UK also rank highly. **Stanford University Medical Centre** came 3rd, with **Oxford University Hospitals NHS Foundation Trust** (12th), **Yale New Haven Health System** (14th), **Cambridge University Hospitals NHS Foundation Trust** (24th), **University of Pennsylvania Health System** (28th) and **UCLPartners** (29th) all ranking in the top 30. While they scored relatively well in the patient treatment, research and teaching metrics, they all scored very highly in awareness and familiarity.

It is likely that these high familiarity scores are enhanced by the reputation of the universities that these medical centres are attached to, building a higher degree of reputation and brand equity. It is also likely that these academic medical centres have seen the importance of creating a strong brand first hand from the universities they are attached to.

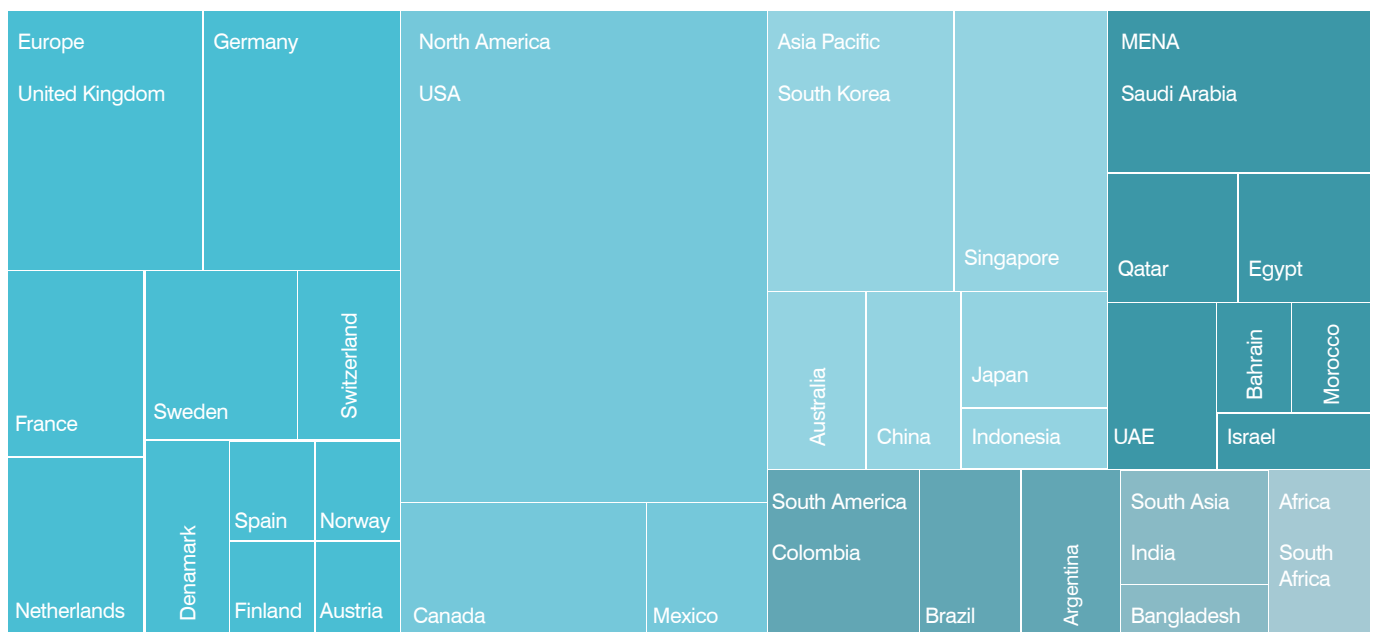
They have subsequently been able to utilise this understanding and experience to build stronger and more successful brands for their medical centres, hence their performance in the ranking.

Many research universities are very experienced in building and protecting strong brands in their competition for staff, students and research funding.



AMCs in Top 100 by Country

© Brand Finance 2023



Top AMC Hospitals in 100 by Segments

© Brand Finance 2023



Patient Treatment



Research



Education



Groote Schuur Hospital
Facility Board



SickKids®



Specialist Academic Medical Centres achieve high performance:

Some specialist AMCs in the ranking also performed well, with **Dana-Farber Cancer Institute** in 6th place, followed closely by **SickKids** in 7th position and **Great Ormond Street Hospital** in 11th place.

Boston based **Dana-Farber Cancer Institute** is a world leading expert hospital for oncology and cancer research. Since its establishment in 1947, the medical centre has earned a reputation as a centre for cutting-edge research for new cancer treatments.

Canadian paediatric teaching hospital **SickKids** features at 7th. Although 2022 has been a particularly challenging year for the organisation, with COVID-19 and the rampant spread of RSV in the US and Canada, SickKids has performed well in the ranking by providing urgent virtual healthcare with its telehealth service offerings.

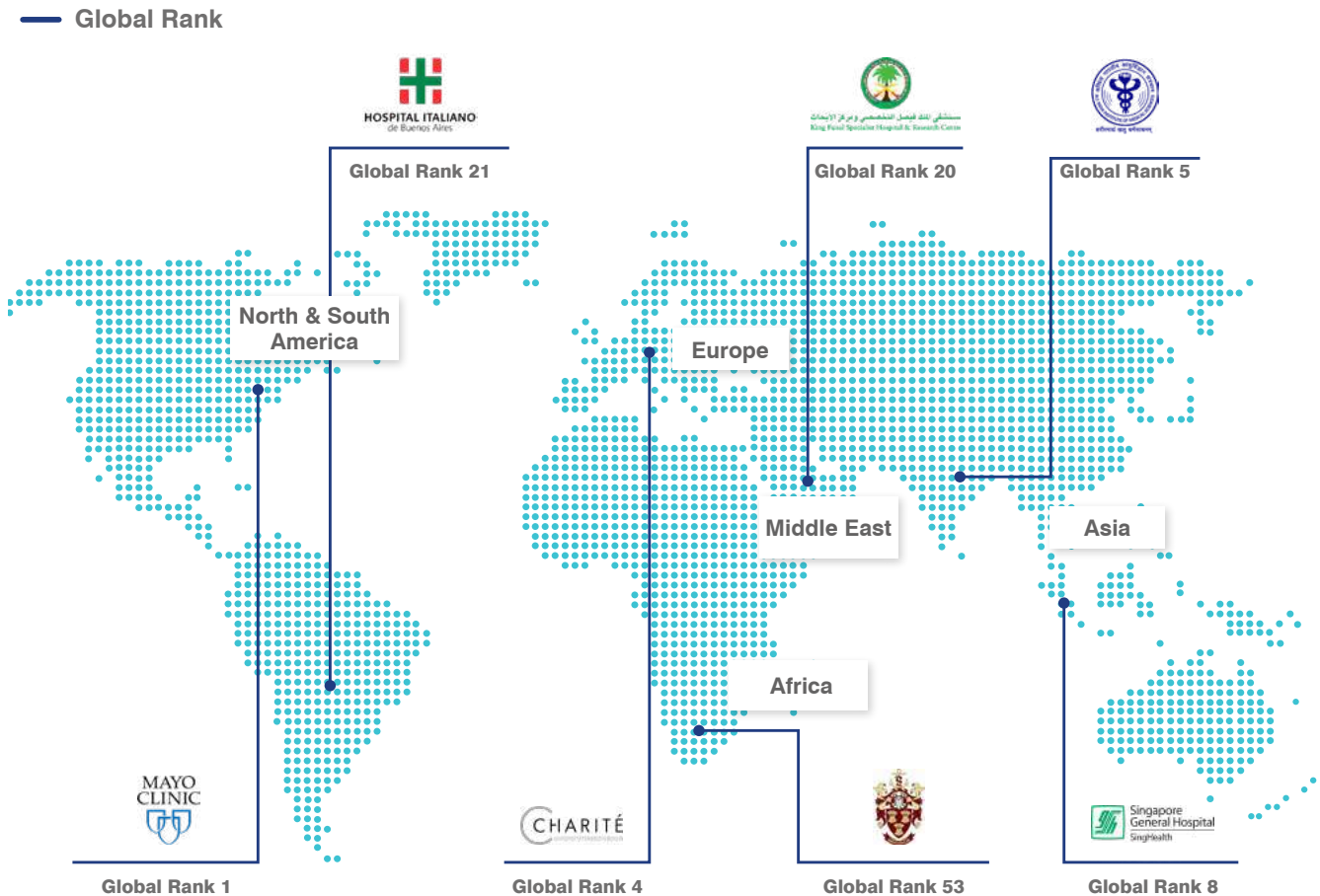
Similarly, UK based paediatric speciality hospital **Great Ormond Street Hospital** features at the top of the ranking for patient treatment.

The hospital has been lauded for its expertise in paediatric intensive care, cardiac surgery, neurosurgery, and paediatric cancer services, while also scoring highest for the metric delivers a world leading patient experience.



Top AMC Hospital per Region

© Brand Finance Plc 2023



Further Regional Analysis:

East Asia's top ranked AMC was **Singapore General Hospital (SGH)** in 8th position in the global ranking. Catering to over 1 million patients annually, SGH scores extremely high in the research and teaching metrics. It is a leading teaching hospital for undergraduate training as well as postgraduate and advanced training of specialist healthcare professionals. SGH also seeks to lead the way in patient-directed research to provide better patient treatment and therapies to both current and future patients. This is reflected in it coming top in metrics for excellent facilities / investment in technology and treatments and strong culture of medical progress and innovation. This diverse and innovative offering highlights SGH as a leader in the field and has contributed to its high scores across the board and resultant high position in the ranking.

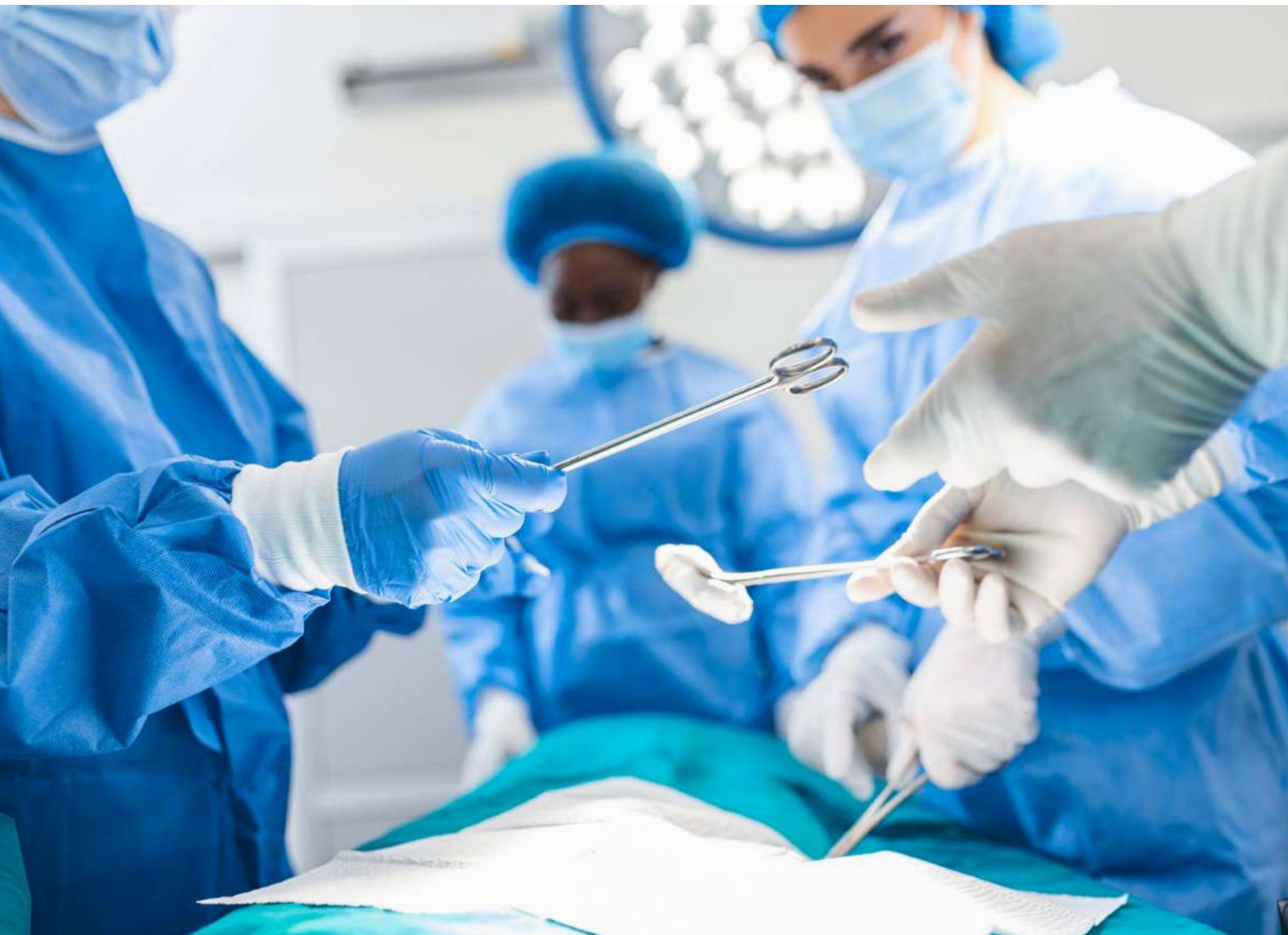
King Faisal Specialist Hospital and Research Centre (KFSH&RC) is the highest ranked AMC in the Middle East and North Africa region in 20th place. KFSH&RC scored consistently highly across the board, hence its solid position in the ranking. In a similar way to other top scoring AMCs **Charité** and **AIIMS**, **King Faisal Specialist Hospital and Research Centre** is very prominent locally and regionally. Its patient-centric focus contributed to a high score in patient treatment in Brand Finance's research and combined with its strong regional reputation for integrated educational and research capabilities. However, despite **KFSH&RC's** leading position and extremely strong reputation in the Gulf region, their global familiarity is lower than most of the other top 20 AMCs. This highlights an opportunity for it, and other similar regional leaders, to further boost Brand Strength by working to translate local reputation on to a global stage.

South African **Groote Schuur** was the highest ranked AMC from Africa (53rd). It was also the top scoring AMC globally for teaching. Groote Schuur is the chief academic hospital of the University of Cape Town's medical school, and is known internationally for its trauma unit, anaesthesiology department, and internal medicine department. It also received a very high score for known for medical breakthroughs in Brand Finance's research.

In 1967, surgeons at **Groote Schuur** conducted the world's first successful human heart transplant, helping boost its reputation significantly and likely contributing to its global awareness to this day. This has combined with its eminent role in the region's

teaching capabilities and contributed to its top position in the teaching metric.

Argentinian AMC **Hospital Italiano de Buenos Aires** was the highest ranked South American AMC in 21st position, ahead of Columbia's **Hospital Universitario Fundacion Valle del Lili** at 32nd. Both had relatively low awareness and familiarity scores but had solid scores elsewhere in metrics such as investment, which have boosted their positions in the ranking. This reflects a trend throughout the ranking that there are many regional leaders that are very well perceived among those that interact with them, but don't yet project their brand onto the global stage.



World's top 100 AMCs.

World's top 100 AMC Hospitals 1-50

2023 Rank	Brand	Country	2023 Brand Strength
1	Mayo Clinic Health System	USA	85.1
2	Massachusetts General Hospital - Mass General	USA	80.4
3	Stanford University Medical Centre	USA	79.8
4	Charité	Germany	79.1
5	All India Institute of Medical Sciences (AIIMS)	India	79.0
6	Dana-Farber Cancer Institute	USA	77.7
7	SickKids	Canada	77.6
8	Singapore General Hospital (SGH)	Singapore	77.1
9	Johns Hopkins Hospital	USA	77.0
10	UCSF Medical Centre	USA	76.8
11	Great Ormond Street Hospital for Children NHS Foundation Trust	United Kingdom	75.8
12	Oxford University Hospitals NHS Foundation Trust	United Kingdom	75.3
13	Brigham And Womens Hospital	USA	75.1
14	Yale New Haven Health System	USA	74.8
15	Cleveland Clinic	USA	74.4
16	University Hospital of Zurich/ Universitatsspital Zurich	Switzerland	74.3
17	Melbourne Health	Australia	73.8
18	The University of Tokyo Hospital	Japan	72.9
19	University Health Network	Canada	72.8
20	King Faisal Specialist Hospital and Research Centre	Saudi Arabia	72.7
21	Hospital Italiano de Buenos Aires	Argentina	71.1
22	Chungnam National University Hospital	South Korea	71.0
23	Michigan Medicine	USA	71.0
24	Cambridge University Hospitals NHS Foundation Trust	United Kingdom	71.0
25	University Hospitals Cleveland Medical Centre	USA	70.7
26	Chaim Sheba Medical Centre at Tel HaShomer	Israel	70.7
27	Christian Medical College Vellore	India	70.6
28	University of Pennsylvania Health System	USA	70.2
29	UCLPartners, London	United Kingdom	70.2
30	New York-Presbyterian Hospital-Columbia and Cornell	USA	69.7
31	Mount Sinai Health System	USA	69.5
32	Hospital Universitario Fundacion Valle del Lili	Colombia	69.2
33	The Catholic University of Korea, Seoul St. Marys Hospital	South Korea	69.2
34	National University Health System	Singapore	68.8
35	Helsinki University Hospital	Finland	68.7
36	RSUPN Dr. Cipto Mangunkusumo	Indonesia	68.7
37	Mount Elizabeth Hospital - Orchard	Singapore	68.6
38	Tan Tock Seng Hospital - Lee Kong Chian School of Medicine, Nanyang Technological University	Singapore	68.6
39	Erasmus University Medical Centre	Netherlands	68.5
40	Monash Partners Academic Health Science Centre (Melbourne)	Australia	68.4
41	Hospital das Clinicas da Universidade de Sao Paulo	Brazil	68.4
42	Hôpital Européen Georges-Pompidou	France	68.2
43	Karolinska Universitetssjukhuset	Sweden	67.8
44	King Hamad University Hospital	Bahrain	67.8
45	Faculty of Medicine, Ain Shams University	Egypt	67.7
46	UW Medicine	USA	67.7
47	Seoul National University - Bundang Hospital	South Korea	67.5
48	Gleneagles Hospital	Singapore	67.5
49	University Medical Centre Utrecht	Netherlands	66.9
50	Universitätsklinikum Leipzig	Germany	66.9

World's top 100 AMC Hospitals 51-100

2023 Rank	Brand	Country	2023 Brand Strength
51	The University of Chicago Medical Centre (UChicago Medicine)	USA	66.7
52	Beth Israel Deaconess Medical Centre	USA	66.7
53	Groote Schuur Hospital	South Africa	66.6
54	Northwestern Medicine	USA	66.5
55	Hospital Clinic de Barcelona	Spain	66.4
56	Norrlands Universitetssjukhus	Sweden	66.4
57	Kings Health Partners	United Kingdom	66.3
58	Hospital Medica Sur	Mexico	66.3
59	Inha University Hospital	South Korea	66.3
60	National Centre for Cancer Care and Research (NCCCR)	Qatar	66.2
61	UCLA Health - University of California Health	USA	66.2
62	Centre Hospitalier et Universitaire Hassan II Fes	Morocco	66.2
63	Hamad General Hospital	Qatar	65.7
64	St Thomas Hospital	United Kingdom	65.7
65	Bispebjerg Hospital	Denmark	65.7
66	Centro Medico ABC	Mexico	65.7
67	The College of Medicine and Health Sciences (CMHS) of the United Arab Emirates	UAE	65.5
68	Sir Salimullah Medical College	Bangladesh	65.5
69	NYU Langone Health System	USA	65.4
70	Aalborg Universitets hospital	Denmark	65.3
71	Cleveland Clinic Abu Dhabi	UAE	65.2
72	Chung-Ang University Hospital	South Korea	65.2
73	University Hospital of Psychiatry Zurich (PUK)	Switzerland	65.1
74	Hospital Universitario Fundacion Santa Fe de Bogota	Colombia	65.1
75	McGill University Health Centre (Montreal, Quebec)	Canada	64.9
76	Hospital Universitario Austral	Argentina	64.8
77	King Abdullah Medical City	Saudi Arabia	64.8
78	Haukeland Universitetssykehus	Norway	64.8
79	CHU Lille	France	64.7
80	Allgemeines Krankenhaus der Stadt Wien - Medizinischer Universitatscampus/ Vienna General Hospital	Austria	64.7
81	Universitätsklinikum Koln	Germany	64.5
82	Universitair Medisch Centrum Groningen	Netherlands	64.4
83	University Hospital Heidelberg	Germany	64.4
84	Hospital de Clinicas de Porto Alegre	Brazil	64.4
85	National Cancer Centre Hospital	Japan	64.3
86	Qasr El Eyni Hospital	Egypt	64.2
87	King Saud Medical City	Saudi Arabia	64.1
88	LMU Klinikum	Germany	64.1
89	Sinai Health	Canada	64.0
90	Chonnam National University Hospital	South Korea	64.0
91	King Fahad Medical City, Riyadh	Saudi Arabia	64.0
92	Renji Hospital	China	63.9
93	Peking University Third Hospital	China	63.9
94	Universitetssjukhuset Linköping	Sweden	63.9
95	Universitätsklinikum Frankfurt	Germany	63.9
96	Tygerberg Hospital	South Africa	63.7
97	University of Texas System	USA	63.7
98	Ministry of National Guard Health Affairs	Saudi Arabia	63.5
99	AP-HP - Hopital Universitaire Pitie Salpetriere	France	63.4
100	Washington University Medical Center (WUMC)	USA	63.4

World's Top AMCs 101-250.

World's Top AMC Hospitals by Country 101-250

*Note: The following AMCs that rank between 101-250, are ordered alphabetically and not based on performance.

Australia	Germany
Queensland Health network	Berufsgenossenschaftliches Universitätsklinikum Bergmannsheil
St Vincents Health service	Klinikum rechts der Isar der Technischen Universität München
Sydney Health Partners	Medizinische Hochschule Hannover
Sydney Local Health District	Robert-Bosch-Krankenhaus
Austria	Universitätsklinikum Carl Gustav Carus Dresden
Oberösterreichische Gesundheitsholding	Universitätsklinikum des Saarlandes
Azerbaijan	Universitätsklinikum Düsseldorf
Hind Klinikasi	Universitätsklinikum Erlangen
Medika Hospital	Universitätsklinikum Essen
Turan klinikası	Universitätsklinikum Freiburg
Bahrain	Universitätsklinikum Hamburg-Eppendorf
Bahrain Defence Force (BDF) Hospital	Universitätsklinikum Regensburg
Bangladesh	Universitätsklinikum Tübingen
Dhaka Medical College and Hospital	Universitätsklinikum Ulm
Ibrahim Medical College	Universitätsklinikum Würzburg
Shaheed Suhrawardy Medical College & Hospital	Universitätsmedizin Göttingen
Belgium	University Hospital Mannheim
UZ Gent	University Hospital of Giessen and Marburg
UZ Leuven	University Hospitals of the Ruhr-University of Bochum
Brazil	India
Clinics Hospital of the State University of Campinas	Sri Ramachandra Medical Centre
Hospital Israelita Albert Einstein	Indonesia
Hospital Moinhos de Vento	Academic Health System Universitas Gadjah Mada
Hospital Sirio Libanes	RSUP Dr. Hasan Sadikin Bandung
University Hospital of Brasília	University of Indonesia Hospital
Canada	Ireland
Hamilton Health Sciences (Hamilton, Ontario)	Dublin Academic Medical Centre
Sunnybrook Health Sciences Centre (SHSC)	St. Vincents University Hospital
Vancouver Hospital and Health Sciences Centre	Trinity Health Ireland (Dublin, Ireland)
China	Israel
The First Affiliated Hospital of Zhejiang University	Soroka University Medical Centre - Clalit Health Services
Third Hospital of Hebei Medical University	Italy
Colombia	Azienda Ospedaliera di Padova
Instituto Nacional de Cancerología	IRCCS Istituto Clinico Humanitas
Denmark	Istituto Clinico Humanitas
Copenhagen University Hospital	Ospedale Pediatrico Bambino Gesù
Herlev Hospital - Denmark	Ospedale San Raffaele - Gruppo San Donato
Egypt	Ospedale San Raffaele Turro - Gruppo San Donato
Al Azhar University Hospitals (Al Hussien Hospital + Sayed Galal Hospital)	Policlinico Universitario A. Gemelli
Alexandria University Hospitals	Japan
Finland	Kyoto University Hospital
Tampere University Hospital	Kyushu University Hospital
France	Osaka University Hospital
CHU Bordeaux - Groupe hospitalier Pellegrin	Jordan
CHU Montpellier	King Abdullah University Hospital
CHU Toulouse	Lebanon
Hospices Civils de Lyon	Fafic Hariri University Hospital

World's Top AMC Hospitals by Country 101-250

Hotel Dieu De France	Mount Alvernia Hospital
Lebanese American University Medical Centre	South Korea
Mount Lebanon Hospital Medical Centre	Ajou University Hospital
Mexico	Asan Health Network
Centro Medico Zambrano Hellion	Korea University Anam Hospital
Hospital Civil De Guadalajara Juan I. Menchaca	KyungHee University Medical Centre
Hospital General de Mexico Dr. Eduardo Liceaga	Severance Hospital, Yonsei University College of Medicine
Hospital General Dr. Manuel Gea Gonzalez	Yeungnam University Medical Centre
Hospital Universitario Dr. Jose Eleuterio Gonzalez	Spain
Hospitales Angeles	Clinica Universidad de Navarra
Morocco	Hospital General Universitario Gregorio Marazon
Centre Hospitalier Ibn Sina Rabat	Hospital Ramon y Cajal
Centre Hospitalier Universitaire Ibn Rochd Casablanca	Hospital Universitari Vall dHebron
CHU Ibn Rochd (Centre Hospitalier Universitaire Ibn Rochd)	Hospital Universitario 12 de Octubre
Hopital Militaire dInstruction Mohammed V	Hospital Universitario La Paz
Ibn Tofail University Hospital	Hospital Universitario Virgen del Roclo
Netherlands	Hospital Universitario y Politecnico la Fe
Amsterdam University Medical Centres (Amsterdam UMC)	Sri Lanka
Leiden University Medical Centre (Leiden, the Netherlands)	Karapitiya Teaching Hospital
Maastricht University Medical Centre	Lady Ridgeway Hospital for Children
Radboud University Medical Centre	NHSL
Radboud University Nijmegen Medical Centre	Teaching Hospital, Peradeniya
Nigeria	Sweden
Lagos State University Teaching Hospital	SkÅynes Universitetssjukhus - Lund
Lagos University Teaching Hospital	Universitetssjukhuset Orebro
University College Hospital, Ibadan	Switzerland
University of Uyo Teaching Hospital	Le Centre hospitalier universitaire vaudois (CHUV)
Norway	Turkey
Diakonhjemmet Oslo	Hacettepe University Hospitals
Oslo Universitetssykehus	UAE
Pakistan	Dubai Medical University Hospital
Aga Khan University Hospital, Karach	United Kingdom
Mayo Hospital	Barts Health NHS Trust
University Dental Hospital	Manchester University NHS Foundation Trust
Philippines	Royal Infirmary of Edinburgh
Angeles University Foundation Medical Centre	St Georges University Hospitals
Capitol University Medical City	University Hospitals Birmingham NHS Foundation Trust
University of Santo Tomas Hospital	USA
Qatar	Baylor University Medical Centre (Baylor Dallas or BUMC)
Heart Hospital	Cedars-Sinai Health System
Rumailah Hospital	Duke University Hospital
Sidra Medicine	Houston Methodist
Saudi Arabia	UC San Diego Health
King Fahd Hospital of the University	UCHealth University of Colorado Hospital
King Khalid University Hospital	University Of Utah Health
Singapore	University of Virginia Health System
Changi General Hospital	UW Health
Khoo Teck Puat Hospital & Yishun Community Hospital	Vanderbilt University Medical Centre (VUMC)

AMC Ranking and Brand Strength Index Methodology.



The objective of the study was to create a way to holistically understand what makes the world's top academic medical centres leaders in their field. Although many studies consider the medical KPIs of hospitals, none of these are truly comparable globally, due to the differences in reporting regulations. Brand Finance has built a study that allows transparent and detailed understanding of the perceptions of healthcare professionals around the world, with insights that can be actionable and enable clear targets for growth.

To understand which factors determined a strong academic medical centre Brand Finance conducted interviews with stakeholders of AMCs around the world, covering the key areas of patient treatment, medical research, and training & education.

This enabled the creation of a survey as we were able to understand what was important for the different stakeholder groups and hence have a holistic understanding of brand strength for AMCs. Thus, we were able to design the survey in a way such that relevant questions were asked that would allow the subsequent metrics to form our brand strength scorecard.

Our version of a brand strength scorecard is what we call the Brand Strength Index™. The Brand Strength Index (BSI) is a scorecard of metrics that underpin a brand's strength, and are specific to each industry and designed to measure how a brand or reputation influences key stakeholders behaviours – and ultimately leading to more positive interactions with the organization.

The world's most comprehensive research on perceptions of Academic Medical Centres



40+
Countries



500+
AMCs



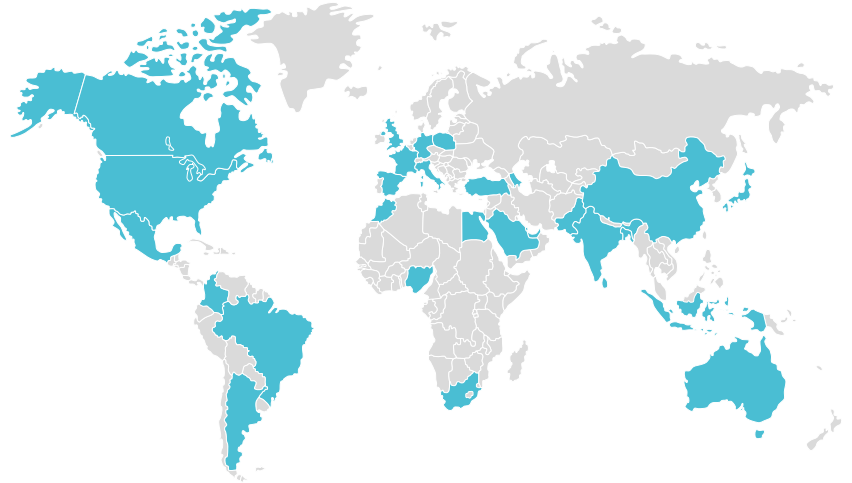
2,500
Healthcare professionals



30+
Metrics covered



Covering Health Care Professionals (HCP) perceptions of AMCs



● Researched Markets

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For a commercial business the benefits can range from increased sales, price premium or growth, to accessing cheaper capital and favorable supplier terms.

To be recognized as a top AMC delivers benefits which can be seen throughout the organization – assuring patients and families, attracting exceptional doctors, top students applications, prominent research staff, enabling proud employees, and research publication, and respect from regulators, governments, insurers and partners of all kinds.

The BSI is split into 3 main pillars: Investment (25%), Equity (50%) and Performance (25%). Investment measures reflect the degree to which a brand owner is investing in and supporting the brand. 'Brand Investment' goes well beyond marketing spend, and includes whether AMCs are trying to improve their facilities, services, accessibility, etc – the factors that management can focus on to develop the brand's identity and attributes.

These are forward-looking and less about how the brand may have performed to date.



A comprehensive measure of brand equity sits at the heart of brand evaluation as this is the degree to which stakeholders are aware of the brand, and their perceptions of it.

Therefore, brand equity has the highest weighting within our BSI framework. Performance measures such as improving reputation and the ability to attract top talent to these AMCs form the final pillar as they can be considered to be the result of a strong brand and their investment behind it.

Within each pillar, they are further split into sub-categories of Overall (31%), Care (18%), Research (15%) and Teaching (12%). Within the Equity pillar, there are also funnel metrics such as Awareness and Familiarity at a local, regional and international level that makes up 25% of the BSI. A higher weighting is given to international familiarity and awareness, followed by regional and local in order to represent a global study.



Perceptions measured in Brand Finance's AMC study

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Awareness		Local		Familiarity		Local		Reputation		Overall Metrics		Treatment Metrics		Research Metrics		Teaching Metrics
		Regional				Regional				Excellent facilities / Investment in technology	Brand momentum	Adopts latest medical treatment or technology	Offers comprehensive assistance for patients and families	Able to rapidly translate medical research into new treatments	Known for scientific breakthroughs	Organization that medical professionals are proud to have trained/worked at
Awareness		Regional		Familiarity		Regional		Reputation		Affiliated with other leading organizations	Strongly associated with its specialisms	Delivers world leading patient experience	Accessible to any patient in need of their specialist care	Contributes new research and papers to the medical community	Leading fight against diseases in its specialisms	Teducation / Training Reputation
		Global				Global				Promotion Score	Is internationally recognized and has the relevant accreditations	Specialist HCPs are among the world leaders in their fields	Delivers best in class patient outcomes	Strong culture of medical progress and innovation	Attracts the top medical research talent	Has a leading medical training programme
Awareness		Global		Familiarity		Global		Reputation		Conversation Incidence	Is a well-run organization	Patient Treatment Reputation	Offers patients access to the latest clinical trials	Research Reputation		Attracts the top medical student applications
		Global				Global				Conversation Sentiment	Integrated between teaching, research, and patient care					
Awareness		Global		Familiarity		Global		Reputation		Overall Reputation						
		Global				Global										

AMC Research Methodology.



2023 marks the inaugural wave of Brand Finance's global research programme to understand perceptions of the world's largest academic medical centres (AMCs) amongst doctors, surgeons, and other practicing healthcare providers. The programme is the first of its kind to assess how AMCs are seen from the perspective of healthcare professionals.

Who?

Healthcare panels exist around the world that are used for research into medical, ethical and process issues. Brand Finance leveraged this network to access 2,500 practicing healthcare professionals for this programme. Respondent criteria included current and experienced medical practitioners; everyone has completed their training and practices healthcare today as a general practitioner or specialist.

Where?

To establish a representative global ranking, Brand Finance conducted the research around the world. Respondents were included from 47 countries in all the major continents to understand which AMCs are best known within and beyond their borders. Within each continent we selected countries that would be representative of sub-regions, so markets like UK, Poland, Morocco, and South Africa were used as

paradigms to facilitate a wider perspective for their respective continent. To ensure comparability with the real world, the total recruited in each market was biased toward healthcare spend, so the United States featured more respondents than Brazil, South Korea, or Turkey.

How?

Conducting such a large-scale study required a consistent, streamlined approach. Was used to allow Brand Finance to ensure that all respondents were researched consistently, with random selection of AMC brands shown to each respondent ensuring that the results are a fair and balanced representation of AMC reputations from Cleveland to Nairobi.

What?

Respondents were shown a selection of AMC brands from local, regional, and global lists, with these varying for each market. After answering reputation questions about the AMCs they were familiar with, they were then asked to assign different attributes to each AMC.

By regressing brand attribution with reputation, Brand Finance can understand what truly drives reputation among AMCs, and how this differs around the world.

Research Insights.



Familiarity with AMCs

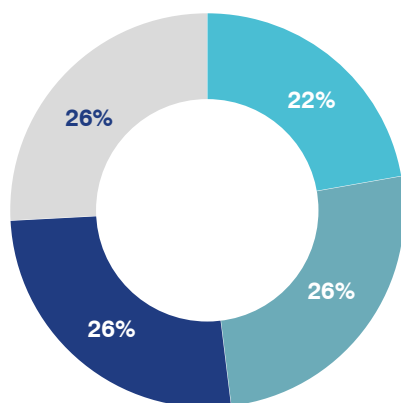
On average healthcare professionals were around a quarter as likely to be familiar with the global AMCs than AMCs from their own country. On top of this, the strength of familiarity decreases, with only 4% of HCPs reporting that they know AMCs from outside their market well.

The best known AMCs globally are, with one exception, American. And these are so well known, the average doctor is more familiar with them than their local and regional AMCs.

Oxford University Hospitals NHS Foundation Trust is the outlier from the UK, and is likely boosted by awareness of the associated university.

Average familiarity among local doctors

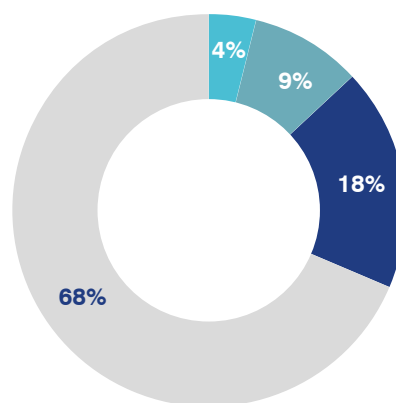
- Know it well
- Know it a little
- Know the name
- Not aware



© Brand Finance 2023

Average familiarity among the rest of the world

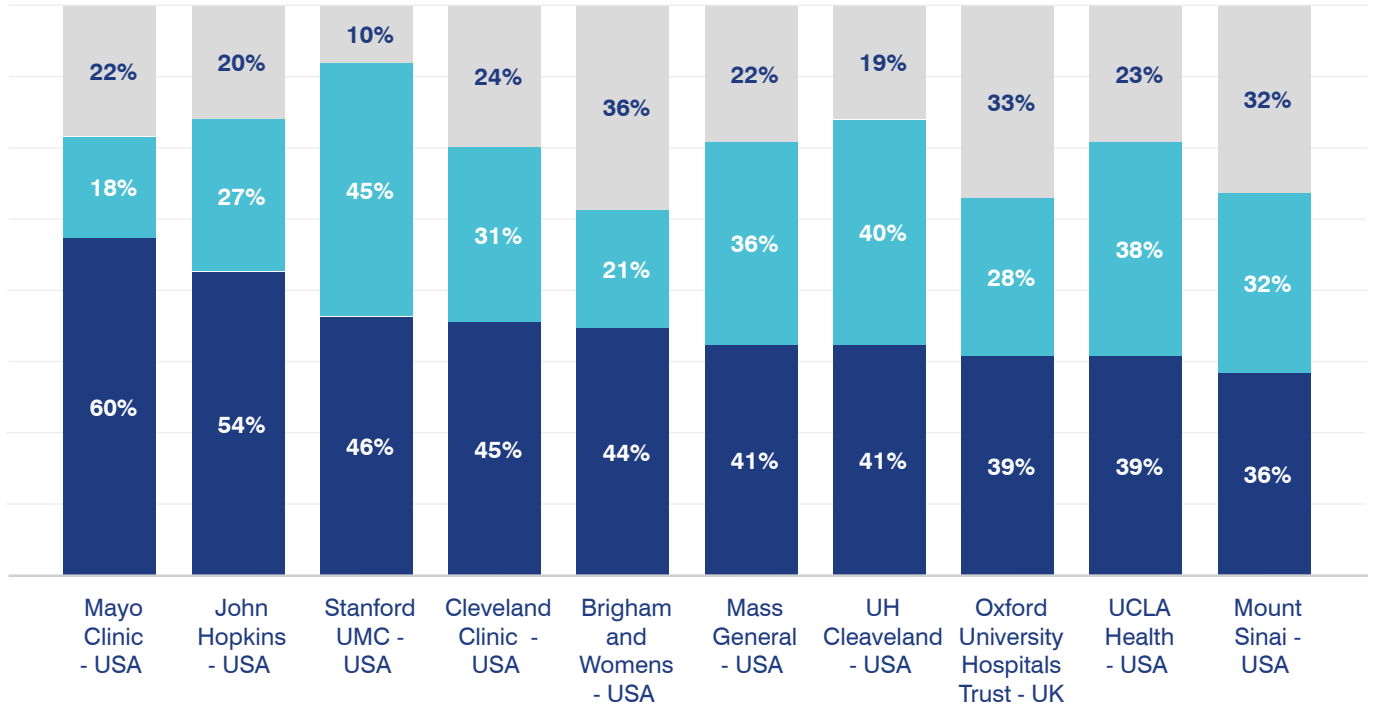
- Know it well
- Know it a little
- Know the name
- Not aware



© Brand Finance 2023

Top 10 AMC globally by familiarity

© Brand Finance Plc 2023



Rating AMC Reputation

Respondents were asked to rate the overall reputation of the AMCs that they are familiar with on a scale of 0-10; 0 being extremely poor and 10 being extremely good.

The AMCs with the best reputation, however, are not always the best known. **Centro Medico ABC, Hospital Sino Libanes** and **AIMS Delhi** are statistically tied as the hospitals with the best reputations around the world.

Only 4 of this top 10 Overall Reputation list feature in the top 20 AMCs globally based on the Brand Strength Index.

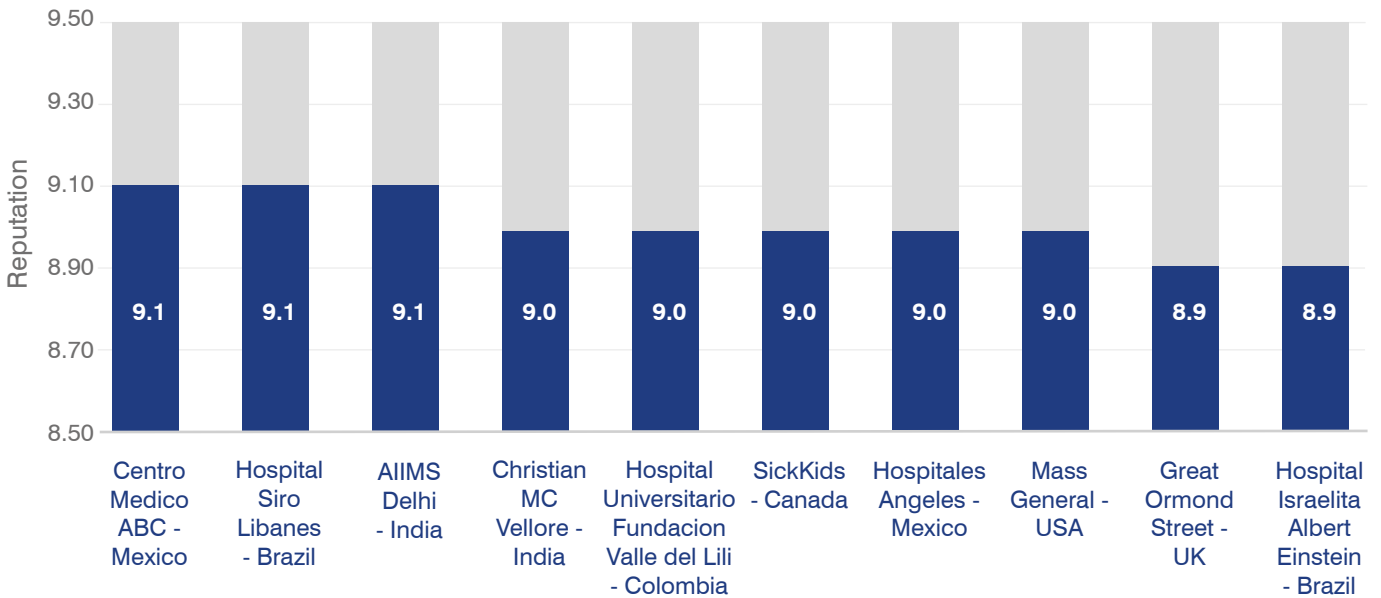
Colombian, Mexican and Brazilian AMCs take 5 places in this the top 10; while these AMCs are undoubtedly local leaders, it also shows how HCPs from different regions can be more likely to respond positively about the AMCs they are familiar with.

These cultural variations in respondent tendencies are normalized in the calculation of the Brand Strength Index, to give a globally comparable ranking.



Top 10 AMCs globally for 'Overall Reputation'

© Brand Finance Plc 2023



Drivers of Reputation

After rating the overall reputation, the respondents then reported which specific attributes they associate with the AMCs. These attributes were selected based on qualitative interviews with stakeholders around the world, and reflect the factors reported as being critical to building a strong AMC.

They fall into 4 categories – relating to Patient Treatment, Medical Research, and Education / Training, and then some attributes that reflect the whole organisation.

The attribute responses can then be analysed to understand which factors drive a strong overall reputation for an AMC. The results show that leading in their specialisms is the most important attribute in driving reputation for top AMCs, contributing 16% of reputation.

The top AMCs in this metric include **Dana-Farber Cancer Institute** (USA, 6th in ranking), **Chungnam National University Hospital** (South Korea, 22nd) and **Hôpital Européen Georges-Pompidou** (France, 42nd). Conversely, offering comprehensive care and being accessible to any patient are the weakest drivers – highlighting how the top AMCs most commonly build success by focusing on specialisms, and doing a small number of things very well.



Research Insights.

Other important drivers relate to being at the cutting edge of medicine; "Adopting the latest medical treatments and technologies", "Rapidly translating research into treatments" and "contributing new research to the medical community" are in the top 5 and together drive 1/3rd of an HCP's assessment of an AMC's reputation.

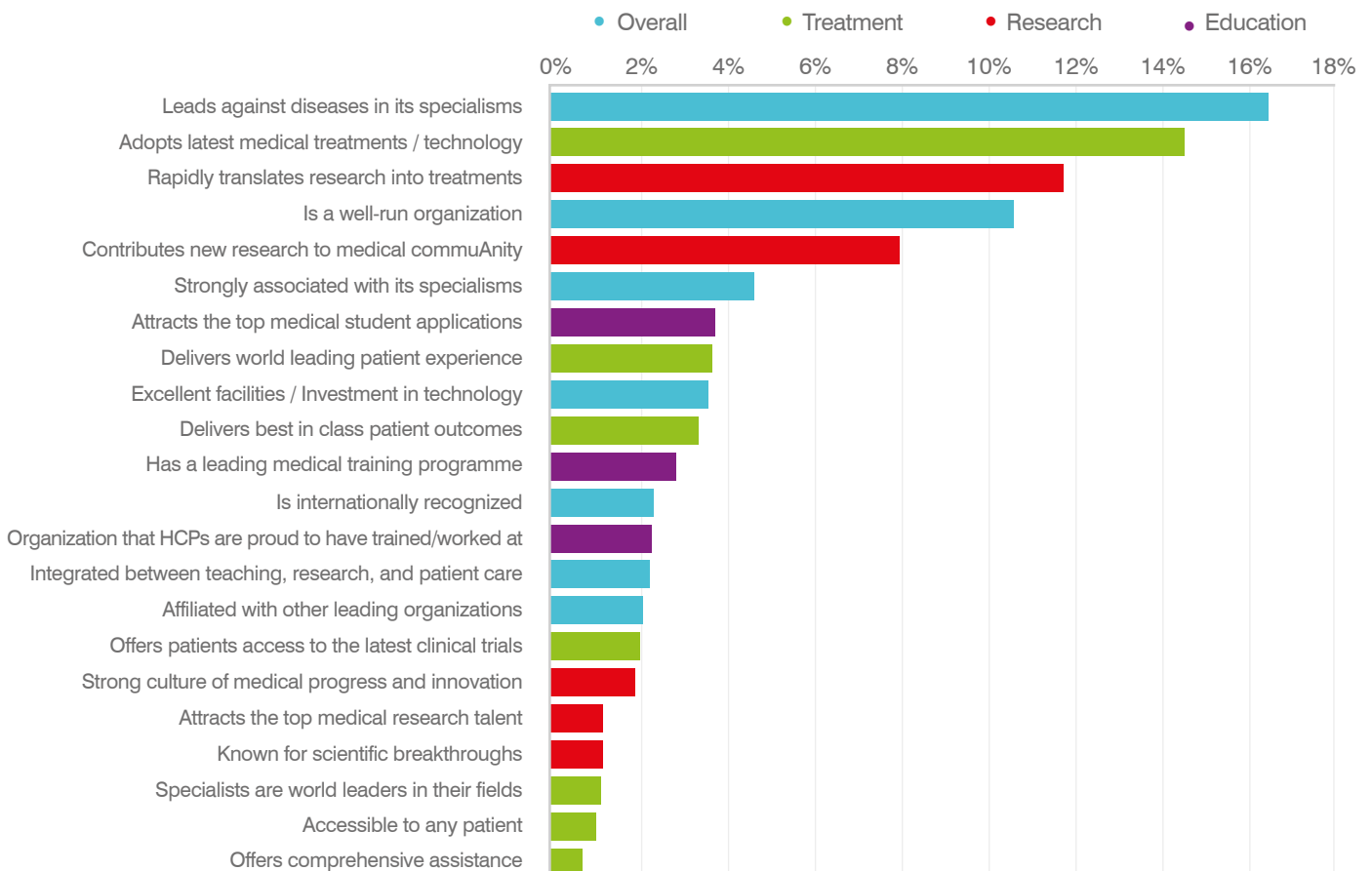
The AMCs that were researched are all among the best in the world, and this may explain that some patient focused metrics do not feature prominently when differentiating between AMC reputation.

"Delivers world leading patient experience" and "delivers best in class patient outcomes" together make up less than 7% in terms of driving reputation – this could be because these factors are assumed for the top AMCs, or because these metrics are best graded by medical KPIs or patient surveys, and HCP respondents are reluctant to advise on them.



Drivers of 'Overall Reputation'

© Brand Finance Plc 2023



Brand Spotlights.



Dana-Farber.



Dana-Farber
Cancer Institute

Rank

6

Brand Strength

77.7

Building a World-Class Medical Centre Brand.



Hayes Roth
Principal,
HA Roth Consulting LLC

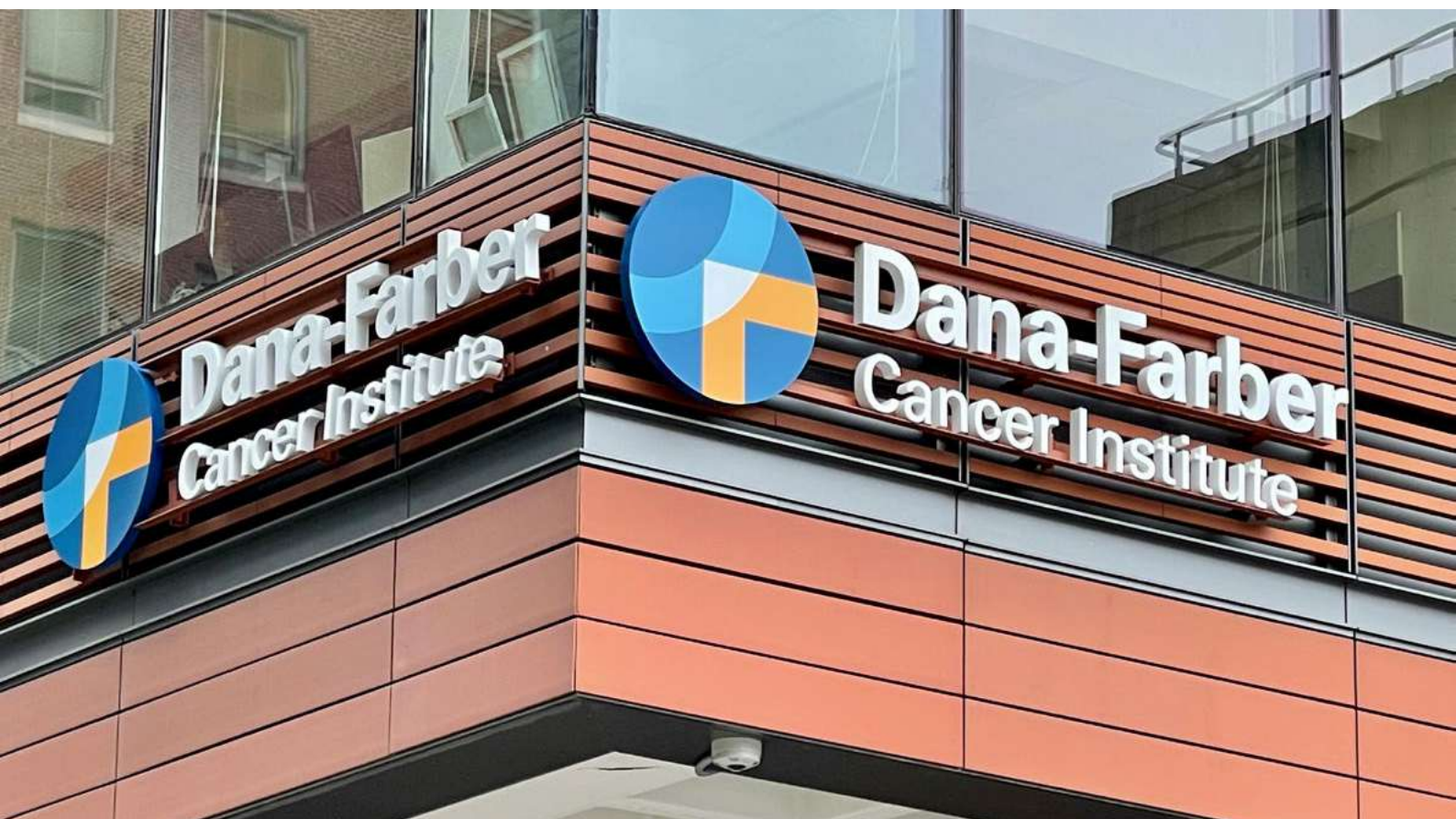
In 2017, HA Roth Consulting was engaged to assist with a major rebrand of the Dana-Farber Cancer Institute.

Building a great brand in any category requires years of hard work, strong leadership and deep, sustained commitment to delivering consistent, best-of-class performance across every aspect of an organisation... most of which has little to do with physical “branding” itself.

But successful, brand-led organisations all share a distinct, well-understood brand idea at their core and a disciplined respect for its application. All else emanates from this foundation and well-branded academic medical centres are no different.

What does make the branding challenge for hospital systems and, especially, academic medical centres, more difficult is their exceptional range of highly diverse audiences, technical service offerings and the complex, often disconnected departments, schools and physical environments they inhabit. They are a complicated synchronisation of moving parts that have usually evolved over time, encompassing legacy names, affiliations and sub-brands, centres and institutes, structures, processes, services, capital requisites, regulatory requirements, donor development, livery, signage, digital platforms and a myriad of other intricacies that all compete for resources and attention.

Branding obviously cannot solve all these organisational complexities, but it must understand and embrace them to help executives, doctors, nurses and staff coalesce around a strong, resonant brand idea and expression that inspires and differentiates. When effectively conceived and implemented, the resulting brand positioning, identity and visual system becomes the lens through which the organization builds its reputational strength and value.



Yet, given the many and varied components at work within most major, academic medical centres, maintaining brand discipline can be particularly hard and it is not uncommon for them to discover, over time and despite all good intentions, their branding has strayed far afield of its original conception. This invariably results in diffused impact, awareness and value and generally demands a return to the basics of brand building.

Such was the case with Dana-Farber Cancer Institute in 2017. Although widely recognised as one of the world’s most respected cancer research and clinical care institutions among oncologists and healthcare experts, it suffered very limited general awareness outside its native New England region. An example of just some of Dana-Farber’s former legacy brand relationships is illustrative*.

This was due to many factors, including the institution’s long heritage of prioritizing its resources into the quality of its science and patient care, but also because their branding had become increasingly diffuse over time.

This lack of a cohesive brand expression undermined any Dana-Farber efforts to communicate a clear, consistent message to its target audiences

of patients, referring and resident physicians, researchers and clinicians, caregivers, staff, vendors, affiliates, payers, government entities, donors and more.

Fortunately, new leadership at the organisation recognised the need for a “brand overhaul” and embarked on a comprehensive rebranding initiative.

As with all successful branding projects, we started with information gathering, interviewing some 40 – 50 doctors and staff, including Nobel Prize winners, plus a competitive analysis of peer group branding and messaging.

Months of work led us to two key conclusions:

1. Dana-Farber’s unique culture and organisational structure that fully integrates world-class cancer research and exceptional clinical care by physicians and specialists who deliver both, was a fundamentally differentiating approach to fighting and treating cancer.
2. The marketing and messaging for most healthcare organisations at that time was a virtual “sea of sameness” that begged for fresh thinking and creativity.

*An example of just some of Dana-Farber’s former legacy brand relationships is illustrative



Building a World-Class Medical Centre Brand.

Building upon a brand platform that celebrated Dana-Farber’s distinctive approach to cancer research and clinical care (“from bench to bedside... and back again”), we explored a wide range of brand design ideas.

The result, after much consideration, is their new Dana-Farber “Lens” brand icon, which symbolises their fully integrated approach to science and care with its overlapping “D” and “F,” as if closely examined through a microscope.

The central, white-space intersection where the two letters overlap is a direct allusion to the collaborative inspiration at the heart of all that Dana-Farber does.



Once their new identity had been established, our next task was to streamline and codify Dana-Farber’s brand architecture into a logical and cohesive structure. This is always a particular challenge with academic medical centres for reasons previously discussed and represented here:



Master Brand		
Primary Clinical Brands		
DF/BWCC Satellites		
DFCI Satellites Practices		
Collaborative Member Endorsement Brand		
Affiliate/Alliance		

Building a World-Class Medical Centre Brand.

Discussions around brand architecture decisions can often be heated and even emotional as they inevitably lead to the “retirement” of legacy brand-like objects and signatures. But the over-arching branding priority for any world-class organisation should be to build upon the strength of its core brand signature and jettison virtually all competing logos and/or modified logo treatments. There can be only one core signature driving the brand— no modifications, adaptations or infringements permitted!

While important partnerships and associations will always need to be acknowledged and accommodated, it is essential to establish a definitive protocol that protects the core brand while clarifying how it properly represents its relationships with other significant entities. In this way, the Dana-Farber brand and the positioning behind it is consistently reinforced and the rules remain understood and respected, ensuring future good management of the brand’s assets will only build upon its strength and value.

Today, Dana-Farber Cancer Institute’s branding is proudly embraced and celebrated by its leadership and staff alike and has become a very visible presence across the Boston area and among oncologists worldwide. It will also serve as a bold “flag” at the forefront of the organisation’s long-term expansion plans, communicating a strong, well-grounded brand persona and succinct representation of Dana-Farber’s game-changing, breakthrough contributions to the tireless fight against cancer.

There remains much work to do to amplify Dana-Farber’s broader awareness, but today they have the platform, the brand, the commitment and the tools to earn their honored standing as a world-class academic medical centre brand.

As their advertising claims, “What we do here changes lives everywhere.”



SickKids.



SickKids[®]

Rank

7

Brand Strength

77.6

Interview with Kate Torrance.



Kate Torrance
Vice President,
Brand Strategy &
Communications,
SickKids Foundation

Our study has ranked SickKids as the top AMC in Canada, and 7th in the world - this is built on strong perceptions from HCPs on SickKids' treatment, research and care - how do these areas work together to develop the brand?

SickKids is known for its collaborative culture, with outstanding staff who are focused on excellence, integrity, inclusivity, continuous innovation, collaboration, and compassionate and family-centred care. Staff at SickKids are united in their focus on improving health outcomes through the integration of patient care, research and learning, and that's reflected in the stories we share and in the experiences health-care professionals, patients and families have while at SickKids.

SickKids is often described by patients and families as “magical” or “a second home.” Despite being faced with fear and uncertainty through illness or trauma, families feel an incredible sense of comfort at SickKids. Not just because of the impeccable reputation for excellence in clinical care, research and learning, but because of our approach to care that is centred on the needs of patients and their families. It is the unique experiences at SickKids that make kids and families feel like they aren't in a hospital.

When profiling the work of the hospital, and why donations are needed, we don't limit our stories to clinical and research breakthroughs. We share stories about how patients can bake cookies in our family lounges; how our music and art therapists help children cope through uncertainty and pain; how patient and families are involved in decision-making; and we celebrate our wonderful staff at every opportunity. At SickKids, kids are kids first, not just patients - and they need their family around them to heal. Sharing the breadth and depth of SickKids medical and research expertise must always be paired with our unique approach to care and the patient/family experience - and that's what makes SickKids so much more than a hospital.



Philanthropy is another important aspect contributing to the success and sustainability of SickKids - how does this aspect, and the public nature of it, help build the SickKids brand?

Philanthropy and brand have a symbiotic relationship. In essence, the “brand” is what a donor gets in exchange for their donation. When making a gift to SickKids, you aren’t getting a product or service – you get a feeling. A pride of association with an incredible institution that is helping children.

A strong brand will both attract new donors and retain existing ones. Any cause can give you information on why donations are needed, but a brand is what gets into your heart and develops an emotional connection with you. And then, because of that experience, our donors become brand ambassadors and fundraisers on SickKids behalf, which in turn generates more philanthropy.

SickKids' promotional activities for the charity have won awards for their effectiveness - how does the organisation create a unique brand through consumer advertising, while maintaining (/interacting with) the serious nature of the work and research conducted there?

The success of the SickKids brand is due in large part to its use of authentic storytelling to build awareness, credibility, and brand affinity. All people featured the advertising and marketing content are real patients and staff who participate in the filming and agree to share their stories.

This allows the content to be more conceptual and creative without being contrived. The work has always been about telling real stories but in a surprising and expected way, which breaks through the clutter and resonates emotionally with our donor community.

Those who have a direct experience with the hospital appreciate that the brand work is celebrating the lives of our patients and families, both the ups and the downs – while those potential donors who have never been to SickKids are drawn in by the powerful stories and get a glimpse into the experiences of those they are helping with their donation.

How can/does the reputation of SickKids reach outside of Canada to a wider region?

The Hospital for Sick Children (SickKids), affiliated with the University of Toronto, is Canada's most research-intensive hospital and the largest centre dedicated to improving children's health in the country.

The SickKids Research Institute is Canada's largest, hospital-based child health research institute dedicated to improving the health of children. It is a beacon for researchers from around the world and has a long history of innovation resulting in many valuable contributions to improving children’s health globally. Our research programs range from basic discovery research all the way to clinical care and are supported by state-of-the-art expertise, technologies and facilities.

As a research hospital, every child has the opportunity to participate in clinical research and learn about ongoing SickKids studies. SickKids engages in a variety of initiatives to improve child health around the world. These include the SickKids Centre for Global Child Health, SickKids International, our International Patient Program, and more.

SickKids provides a comprehensive array of paediatric services and it is world-renowned for its delivery of the most complex and specialized health care, including advanced cancer therapies, complex surgical interventions, advanced cardiac surgeries, and multi-organ transplantation. SickKids is the only hospital in Canada that provides treatment for certain types of paediatric illnesses.



Learning at SickKids is the critical link between knowledge and its application in the care of a sick child. As an academic health sciences centre affiliated, learning is integrated into virtually all activities across SickKids, from the formal training of the next generation of child health clinicians and researchers from around the world, to the professional development of clinical, research and administrative staff, the education of patients and their families, and engagement and knowledge sharing with the community. As a result, SickKids plays a critical role in enhancing knowledge and developing capacity in the paediatric health-care system provincially, nationally and internationally. There is a SickKids connection and story to be found in regions the world over.

In addition to the clinical, research and education reach and reputation of the hospital, the brand advertising campaigns have won awards around the globe, and captured the attention of not-for-profit and healthcare institutions in other markets who have invited SickKids to share their brand and marketing strategies to improve their awareness and fundraising activities.

SickKids commitment to investment in brand building and production of compelling creative has disrupted and shifted the category norms in NFP marketing as a whole.

What benefits is SickKids able to derive from its strong reputation?

SickKids is on the cusp of turning 150 years old. In that time, it has grown from a community hospice to being ranked the number one paediatric hospital in the world by Newsweek in 2021. It has helped millions of patients from around the globe, and has trained hundreds of thousands of medical staff, both locally and internationally.

It is the home of many world-firsts, including the discovery of the gene that causes cystic fibrosis in the 1980s. It is SickKids deep history, the discoveries, the reach, the breakthroughs and, most importantly, the compassionate care that have fueled its strong reputation.

This in turn attracts the world's top talent to SickKids, to study or to work among the best of the best. Our expertise is also sought after by health-care organizations, governments and agencies from around the world who are seeking to enhance delivery of care and improve health outcomes for children and families.

That reputation, paired with the Foundation's investment in building the brand and keeping SickKids top of mind with all our stakeholder groups – donors, the medical community, families, government – work together to fund the future of SickKids.



Singapore General Hospital.



Singapore
General Hospital
SingHealth

Rank

8

Brand Strength

77.1

Interview with Associate Professor Ruban Poopalalingam.



Associate Professor Ruban Poopalalingam
Chairman Medical Board, SGH

Our study has ranked SGH as the top AMC in the Asia Pacific region. How have integrated education and research programmes contributed to the success of SGH?

The Singapore General Hospital (SGH), established in 1821, is Singapore's public sector flagship hospital. We have provided the most comprehensive patient centred care, while training healthcare professionals and conducting cutting edge research for over 200 years.

Innovation is key to us continuing our pivotal role in the healthcare system, providing excellent yet sustainable and affordable care for a fast-ageing population.

We have always leveraged our strength as a member of the Singapore Health Services* (SingHealth) group. We partner with all SingHealth institutions, particularly our national specialty centres and academic partner Duke-NUS Medical School. Working together as the SingHealth-Duke NUS Academic Medical Centre, we continually reimagine new care models, rethink our processes, reinvent care through impactful research, and develop future ready healthcare professionals through education and capability development.

During the COVID-19 pandemic, we seized opportunities to use our clinical, research and training expertise to advance partnerships with industries, both in Singapore and overseas to co-develop highly impactful healthcare innovations.

We further operationalise innovation in SingHealth and SGH by setting up innovation institutes and centres to bring staff together to share their experience. To support those ready to kick-start and translate early-stage innovation projects into working prototypes, grants and other funding are offered and processes were simplified to facilitate agile responses.



SGH has some of the highest scores in the study for Excellent Facilities / Technology, adopting the latest medical treatments & technology, and a strong culture of medical innovation – how is SGH using technology and innovation to maintain leadership in healthcare?

Innovation often goes together with research. SGH focuses on several areas that play on our strengths. These include cancer, cardiovascular disease, diabetes, infection, ageing, as well as immunology and transplant. They are well supported by enablers such as pathological sciences, health services research, and many more.

The structure that we have put in place, in addition to our collaboration with other Institutes of Higher Learning and AMCs across the world, has allowed us to conduct rigorous research with real-world impact.

On the education front, we accelerated the shift from in-person training sessions to gamification, serious games, and simulation. This means our healthcare professionals can train and hone their skills, familiarise themselves with equipment that they have never used, and apply their knowledge in a simulated environment without causing harm to patients and themselves.

It is a key move to make learning fun, engaging, and accessible. These teaching technologies can bring people from different locations together virtually and are particularly effective in improving collaborative work.

Beyond embracing technology such as AI, digitalisation and telemedicine, SGH has started the transformation of our campus in phases. This is a precious opportunity for us to test bed and refine innovations that will enable us to improve our processes, push the boundaries of clinical care with new models of care, and improve accessibility to care while integrating research and education seamlessly into our ecosystem.

The Singapore healthcare system has started to shift focus to preventive medicine and population health. We will use our education and research capabilities to play a leadership role to transform the future of healthcare.

*The SingHealth group comprises four hospitals including SGH, five national specialty centres which are co-located on SGH Campus, as well as a network of three community hospitals and nine primary care polyclinics.



Great Ormond Street Hospital for Children.



NHS

Great Ormond Street
Hospital for Children
NHS Foundation Trust

Rank

11

Brand Strength

75.8

Interview with Ben Marshall.



Ben Marshall
Deputy Director,
International and
Private Care,
Great Ormond Street
Hospital for Children
NHS Foundation Trust

Our study has ranked Great Ormond Street Hospital as the top AMC in the United Kingdom, with the highest score in the study for patient treatment – how have you been able to build such a strong reputation in this area?

GOSH was the first hospital dedicated to children in the English-speaking world. It was founded more than 170 years ago by Dr. Charles West, who recognised that children need different care and treatments to adults. Our teams are always striving to put the needs of sick children and their families first. ‘The child first and always’ has been the hospital's motto for over 100 years, and it is the guiding principle in all areas of our work including patient care and treatment, research and professional education.

We offer the widest range of specialist health services for children on one site in the UK, with over 60 different clinical specialties which means we can treat the whole child holistically. GOSH is also a research hospital where we connect our multi-disciplinary teams of healthcare professionals and scientists to improve the lives of those children with rare or complex diseases. We know that patients treated in hospitals that carry out research have better outcomes; they also have more confidence in their care, they feel more informed, and they tend to have better quality of life.

Great Ormond Street Hospital is quite unique in our ranking due to the prominence of the charity as part of the identity – how does this aspect of the brand interact with the teaching, research and patient treatment offering at GOSH?

GOSH and Great Ormond Street Hospital Children's Charity work together very closely, with the Charity supporting the hospital and its patients by funding four key areas: research into children's health and life-saving medical equipment, support for families and children, rebuilding and refurbishment.



For example, our Charity provides support to enhance our patients' and families' experience through funding Play specialists, as play is very important for children, especially when at the hospital. Our GOSH Arts team provide creative stimulation and brighten up the hospital community with art and live music.

Our Chaplaincy team provide support and advice for parents and families, and our accommodation services keep families together. When it comes to equipment, the Charity funds vital life-saving equipment that allows our clinical and research teams to take advantage of developments in medical science and technology to deliver better care to children.

How can/does the reputation of GOSH reach outside of the UK to a wider region?

Every year our International and Private Care directorate treats more than 5,000 children from over 80 countries. As well as world-class clinical treatment and care, we also have a commitment to delivering a nurturing and family-centred experience, creating home away from home for our international patients and families.

We have established international networks with governments, hospitals and research institutions, and are always open to new partnerships that enable us to grow the positive impact that we can have for children. Healthcare professionals and families learn about GOSH from families and doctors of our former patients, as well as through our dedicated multi-lingual website and social media channels.

Healthcare professionals and families worldwide do their research and learn about the research breakthroughs at GOSH from a range of sources including the media. For example, a recent world-first delivery of base-edited T-cells to successfully treat T-cell leukaemia led to global media coverage, creating interest from countries that we have not previously had relationships with. It is the extraordinary work of our GOSH teams that has built and maintains our global reputation.

What benefits is GOSH able to derive from its strong reputation?

The strength of our reputation certainly attracts the world's leading experts to work with us and contributes to developing new partnerships through which we can drive research and innovation.

Research at GOSH does not only help kids in the UK to fulfil their potential but also children with rare diseases from around the world. At GOSH, our research teams are consistently amongst the best in the world in their disciplines.

Reputation also contributes to attracting talent to our education programmes. We are a global leader in paediatric healthcare education, training more paediatric specialist doctors than any other centre in Europe and providing the largest nurse education program in Europe. Our international fellowship programme attracts doctors from around the world and gives them the opportunity to train under our world-leading experts.



A blurred background image featuring a laptop keyboard on the left, a silver pen on the right, and a document with a bar chart in the center. The bar chart has a vertical axis with labels 0, 50, and 100, and several vertical bars of varying heights. A yellow rectangular overlay is positioned in the upper left quadrant, containing the word "Insights." in white text.

Insights.

Innovating the Patient Experience.



Ron Cappello
Founder and CEO,
Infinia Group LLC

Ron Cappello is the founder and CEO of Infinia Group LLC, a leading brand strategy consulting and design firm who has been supporting healthcare clients for 20 years.

Brand Finance recently interviewed Ron to get his views on how healthcare has evolved, the impact of technology, and what the future holds for the role brand and communication has on the patient experience and in the recruiting and retention of the next generation of caregivers.

Thank you for spending time with us today. We are looking forward to our conversation and getting a better sense of the role brand, reputation, and communication play in the evolving U.S. healthcare market.

Great to be with you. I'm happy to share my experience and observations on this large, dynamic sector of the U.S. economy with your readers.

As a result of the pandemic, telehealth usage in the past two years has surged faster than anyone could have predicted in 2019. How has this impacted the patient experience and care expectations?

While patient experience has been rapidly evolving over the last decade, the pandemic made the interaction between caregivers and patients more important than ever. It has also highlighted the need for clear communication and having a brand that stands for something. Therefore, as we shift from analog to more digitally-enabled care, communication needs to shift from being authority-based to being empathy-based.

The best digital care will be the care that celebrates the human factor. As interactions become more virtual in nature, visits will be dependent on the patient being heard and more responsibility will fall to caregivers to be present, listen well, and make the experience equal to, or better than, an in-person, office visit. This task is not easy, but it is certainly doable.



How can AMCs become innovators and leaders in telehealth? And what do you view the strategic benefits from this investment to be?

Convenience of access to care is one way that health inequalities can be narrowed, and telehealth has a growing role in making this happen. As the bandwidth and availability of digital service continues to grow, so will the adoption of telehealth. Convenience needs to be matched with, and supported by, credibility: the currency of any partnership. A strong brand is the most effective vessel to hold the key elements of clear communication and memorable engagement.

It seems that healthcare in the U.S. is highly fragmented. How does this have an impact on creating a brand that is built on superior patient experience?

It is certainly fragmented, but this does make for a network of specialists that can deliver great care when they work together with patients. As the digital transformation continues to unfold, information will be shared with ease, and communication will become more central in the delivery of care. The infrastructure still has a way to go, but I'm confident it will get to the point where it makes care delivery more effective and efficient, without losing the important human-factor.

Reputation is essential for driving patient choice and satisfaction. What can AMCs do to build their reputation and continue to grow?

The past decade has seen a great deal of consolidation to create large, unified health systems. This includes the goal of having an academic affiliation and the benefits of research that goes along with that, as well as the reputational halo effect of being associated with a well-known academic brand.

At the same time, smaller healthcare businesses and services are innovating at a fast pace with larger organisations either adopting methods and processes, or simply buying the businesses outright. Examples include Amazon buying One Medical, Walmart and CVS expanding their delivery of services, and companies like Apple placing a focus on easily capturing and sharing personal health data.

How has your service evolved with all the changes in the U.S. healthcare sector?

Our services are grounded in understanding the business realities of our clients. The fact is that the biggest changes have existed in the number of channels marketing and communication messages



can be delivered on. It can be argued that there are too many ways to connect with patients and the consumer, but the people are smart, and they gravitate more to content than they do to channels.

Therefore, the importance of being able to define a brand's positioning and overall strategy has remained remarkably consistent.

In addition, the shift from sick care to a focus on preventative care takes time, but it is making progress. The fact is that the problem of changing behavior is quite complex.

You can't crack a complex problem with a simplistic solution. It requires a sophisticated solution that is simple. It requires engaging with patients in ways that meet them where they are, and that alone requires clear, resonate communications.

Our Services.



Consulting Services.

Make branding decisions using hard data

Brand Research

What gets measured

Brand evaluations are essential for understanding the strength of your brand against your competitors. Brand Strength is a key indicator of future brand value growth whether identifying the drivers of value or avoiding the areas of weakness, measuring your brand is the only way to manage it effectively.

- + Brand Audits
- + Primary Research
- + Syndicated Studies
- + Brand Scorecards
- + Brand Drivers & Conjoint Analysis
- + Soft Power



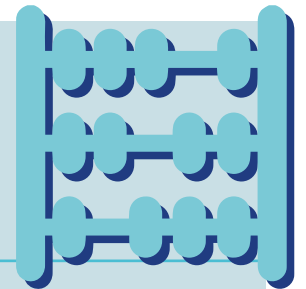
- + Are we building our brands' strength effectively?
- + How do I track and develop my brand equity?
- + How strong are my competitors' brands?
- + Are there any holes in my existing brand tracker?
- + What do different stakeholders think of my brand?

Brand Valuation

Make your brand's business case

Brand valuations are used for a variety of purposes, including tax, finance, and marketing. Being the interpreter between the language of marketers and finance teams they provide structure for both to work together to maximise returns.

- + Brand Impact Analysis
- + Tax & Transfer Pricing
- + Litigation Support
- + M&A Due Diligence
- + Fair Value Exercises
- + Investor Reporting



- + How much is my brand worth?
- + How much should I invest in marketing?
- + How much damage does brand misuse cause?
- + Am I tax compliant with the latest transfer pricing?
- + How do I unlock value in a brand acquisition?

Brand Strategy

Make branding decisions with your eyes wide open

Once you understand the value of your brand, you can use it as tool to understand the business impacts of strategic branding decisions in terms of real financial returns.

- + Brand Positioning
- + Brand Architecture
- + Franchising & Licensing
- + Brand Transition
- + Marketing Mix Modelling
- + Sponsorship Strategy



- + Which brand positioning do customers value most?
- + What are our best brand extension opportunities in other categories and markets?
- + Am I licensing my brand effectively?
- + Have I fully optimised my brand portfolio?
- + Am I carrying dead weight?
- + Should I transfer my brand immediately?
- + Is a Masterbrand strategy the right choice for my business?

Brand Evaluation Services.



How are brands perceived in my category?

Brand Finance tracks brand fame and perceptions across 30 markets in 10 consumer categories. Clear, insightful signals of brand performance, with data mining options for those who want to dig deeper – all at an accessible price.

What if I need more depth or coverage of a more specialised sector?

Our bespoke brand scorecards help with market planning and can be designed to track multiple brands over time, against competitors, between market segments and against budgets. Our 30-country database of brand KPIs enables us to benchmark performance appropriately.

Do I have the right brand architecture or strategy in place?

Research is conducted in addition to strategic analysis to provide a robust understanding of the current positioning. The effectiveness of alternative architectures is tested through drivers analysis, to determine which option(s) will stimulate the most favourable customer behaviour and financial results.

How can I improve return on marketing investment?

Using sophisticated analytics, we have a proven track record of developing comprehensive brand scorecard and brand investment frameworks to improve return on marketing investment.

What about the social dimension? Does my brand get talked about?

Social interactions have a proven commercial impact on brands. We measure actual brand conversation and advocacy, both real-world word of mouth and online buzz and sentiment, by combining traditional survey measures with best-in-class social listening.

Brand Dialogue®



With strategic planning and creative thinking, we develop communications plans to create dialogue with stakeholders that drives brand value.

Our approach is integrated, employing tailored solutions for our clients across PR and marketing activations, to deliver strategic campaigns, helping us to establish and sustain strong client relationships. We also have a specific focus on geographic branding, including supporting nation brands and brands with a geographical indication (GI).

Brand Dialogue Limited is a member of the Brand Finance Plc Group



Research, Strategy & Measurement

- Brand & Communications Strategy
- Campaign Planning
- Market Research & Insights
- Media Analysis



Public Relations & Communications

- Media Relations
- Press Trips & Events
- Strategic Partnerships & Influencer Outreach
- Social Media Management



Marketing & Events

- Promotional Events
- Conference Management
- Native Advertising
- Retail Marketing



Content Creation

- Bespoke Publications, Blogs & Newsletters
- Press Releases
- Marketing Collateral Design
- Social Media Content



Strategic Communications

- Crisis Communications
- Brand Positioning & Reputation
- Geographic Branding
- Corporate Social Responsibility (CSR)



Brand Finance Network.

For further information on our services and valuation experience, please contact your local representative:

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Request your own Brand Value Report

A Brand Value Report provides a complete breakdown of the assumptions, data sources, and calculations used to arrive at your brand's value.

Each report includes expert recommendations for growing brand value to drive performance and offers a cost-effective way to gaining a better understanding of your position against peers.

Visit brandirectory.com/request-a-valuation or email enquiries@brandfinance.com



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Cost of
Capital Analysis



Customer
Research Findings



Competitor
Benchmarking

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Brandirectory is the world's largest database of current and historical brand values, providing easy access to all Brand Finance rankings, reports, whitepapers, and consumer research published since 2007.

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- + Track brand value, strength, and rating across publications and over time
- + Use interactive charts to compare brand values across countries, sectors, and global rankings
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Brand Finance Group.



Brand Finance[®]
Institute

Brand Finance Institute

Brand Finance Institute is the educational division of Brand Finance, whose purpose is to create and foster a professional environment for knowledge-sharing and networking among practitioners and experts in the market. BFI organises events, in-company training, and corporate educational initiatives around the world. In the quest for marketing excellence and with the purpose to equip the brand valuation and strategy practitioners with the necessary skills and tools, we have developed a wide range of programmes and certifications in collaboration with the most coveted business schools, universities and thought leaders in the field.

Brand Dialogue[®]



Brand Dialogue

Brand Dialogue is a public relations agency developing communications strategies to create dialogue that drives brand value. Brand Dialogue has over 25 years of experience in delivering campaigns driven by research, measurement, and strategic thinking for a variety of clients, with a strong background in geographic branding, including supporting nation brands and brands with a geographical indication (GI). Brand Dialogue manages communications activities across Brand Finance Group's companies and network.

vi360

VI360

VI360 is a brand identity management consultancy working for clients of all sizes on brand compliance, brand transition, and brand identity management. VI360 provide straightforward and practical brand management that results in tangible benefits for your business.

Brand Finance®



Global Brand Equity Monitor

- Original market research on over **5,000 brands**
- **38 countries** and **31 sectors** covered
- More than **150,000 respondents** surveyed annually
- We are now **in our 7th consecutive year** conducting the study

Visit brandirectory.com/consumer-research
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