



2024 HEALTHCARE MARKETING OUTLOOK

What you need to know for the year ahead

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The contemporary landscape of healthcare presents a multitude of formidable challenges, ranging from escalating expenses and a scarcity of medical personnel to the complexities of an aging demographic and stringent regulatory frameworks. These challenges converge to exert significant pressure on healthcare providers, compelling them to seek innovative solutions that optimize efficiency and cut down costs without compromising on the delivery of exceptional patient care.

In navigating this intricate terrain, the pivotal role of effective healthcare marketing becomes increasingly evident. By harnessing a profound comprehension of prevailing healthcare dynamics and trends, strategic marketing initiatives emerge as indispensable tools for providers striving to attain their paramount objectives. Whether it's enhancing operational efficiency, containing costs, or maintaining the highest standards of care, leveraging insights from healthcare marketing is imperative for providers to thrive in this demanding environment.

In this whitepaper, we examine four broad trends impacting healthcare; a more granular trend analysis based on the results of our patient insights research conducted earlier this year; and the role of digital marketing to help healthcare organizations adapt to an ever-evolving landscape.



Broad Trends Impacting Healthcare

Consistent trend analysis holds significant importance across all industries, with particular relevance in crafting a robust marketing strategy. This analytical exercise serves as a vital audit tool, offering invaluable insights into the areas where your company excels and where improvements are needed. By leveraging this understanding, organizations can refine their marketing approaches, enhancing efficiency and effectiveness to fortify their position in the market.

While an exhaustive cataloging of all trends impacting the healthcare sector is impractical within the confines of this white-paper, it's imperative to acknowledge and delve into key trends shaping the industry landscape as we progress into 2024. The following section highlights four overarching trends that provide a glimpse into the multifaceted challenges confronting healthcare organizations in the near future.



1 SHIFTING BUSINESS PRIORITIES

Evidence of shifts are everywhere and include a move towards value-based care, increased digitization, cost pressures, the rise of consumerism, and hospital and provider consolidation. Pay-for-performance in the healthcare industry means it is incredibly important to utilize information technology (IT) to increase efficiency. Additionally, patients are demanding real-time clinical and financial data to ensure they are making informed decisions for themselves and their families. As a result, health systems are becoming more state-of-the-art, focusing on tracking patient biometric and longitudinal data. Overall, patients have expressed the need to engage with data about their health more easily, and providers are responding.

2 COST AND REGULATORY PRESSURES

Cost pressures have been exacerbated by the pandemic. As a result, outpatient services — often within hospital networks — are increasingly in demand across the continuum of care since they provide lower-cost alternatives. Additionally, increasing regulatory pressures and certain payment requirements are driving reimbursements lower, leading many payers and providers to reduce costs through automation, streamlined decision-making, and standardization.

3 THE RISE OF CONSUMERISM DRIVES DATA AVAILABILITY

As patients shoulder a larger portion of healthcare costs, a notable shift towards consumer-driven healthcare is underway. This transition is marked by a heightened reliance on automated consumer tools that provide access to essential information such as pricing details, medical outcomes, and convenient ecommerce options for healthcare services and products. This empowerment of patients with readily accessible data not only fosters informed decision-making but also cultivates a sense of ownership over their healthcare journey.

➡ As the consumer takes control, practices should position their marketing to provide answers and to help make them feel more informed and in control.

Furthermore, as the digitization of healthcare continues to advance, the proliferation of relevant data becomes increasingly pronounced. The integration of digital platforms, electronic health records (EHRs), and wearable health devices generates a wealth of real-time patient data. This abundance of data holds significant potential to drive improvements in care delivery, clinical outcomes, and operational efficiency. It serves as a valuable resource for healthcare organizations seeking to align their strategies with evolving patient preferences and needs, thereby bolstering their competitive edge in the market.

4 CONSOLIDATION TAKES A TOLL

Lastly, many hospital and provider groups are either in the midst of — or facing the potential for — consolidation in some form. Although there are many factors that can complicate this process, one of the most significant may be the challenge of smoothly integrating IT systems when consolidations occur — and that process can carry a hefty price tag. Capital costs like these and others associated with mergers and acquisitions could mean that patients end up paying more for their care.

Patient Insights Unveiled

Understanding the consumer is key to success

In addition to broad healthcare themes such as those, more granular trends were revealed in our recent report, [Patient Insights Unveiled: Exploring patient care shopping habits and the impact of social media, thought leadership, and advertising.](#)

In May 2023, we launched a survey asking patients in the U.S. Southeast several questions about their healthcare — such as the process for selecting primary and specialist care and how they interact with practice advertising, websites, and appointment-setting channels (both human and electronic). Because we also asked their age, we were able to segment the responses by generation (as of May 2023). We also focused on responses in the Southeast reflecting the customs and preferences of patients in this area.



What we found was illuminating and useful for practice marketers of all sizes. More specifically, we discovered that each generation has unique needs, habits, and methods for researching health information, booking appointments, and ultimately finding physicians. Patient acquisition and retention isn't a one-size-fits-all endeavor. Marketers, doctors, and managers need to know how each generation approaches key healthcare moments: researching conditions, seeking advice, and deciding on a practice.

The following provides an overview of nine key takeaways from the report.

1 PATIENTS OF ALL GENERATIONS HAVE SHIFTED TO NON-LINEAR TV

The first thing marketers need to know is where their patients are spending their time, and for the majority of participants, it's not on traditional TV.

- ➔ Gen Z and Millennials left traditional TV viewing years ago (or never started)
- ➔ More than 60% of Gen Xers have joined the ranks of the cord-cutters
- ➔ Boomers are the only group with more than 50% viewership of cable/dish — though 45% of them have left it behind for Roku or streaming apps exclusively

② FACEBOOK REMAINS THE TOP PICK ACROSS GENERATIONS

It's not about which social media platform they use, but about what mix of apps they use the most. Every generation had more people ranking Facebook as the most used #1 app, but all of them demonstrated a mix, ranking Instagram, TikTok, and YouTube in the 2th, 3rd, and 4th spots.

GEN Z



MILLENNIALS

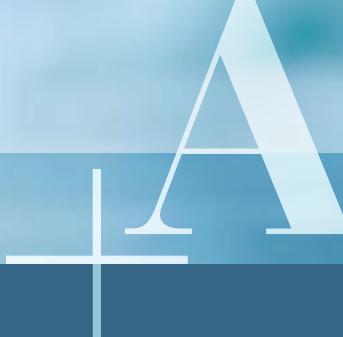


GEN X



BOOMERS





3 PATIENTS AREN'T JUST MAKING DECISIONS FOR THEMSELVES

While this may be obvious to families with kids of all ages, we should keep in mind who the target of our advertising is.

For example: as parents grow older, adult children begin to manage the care of their parents, or at least consult with them when seeking care for conditions treated by specialists. Thus, the targeted segment(s) is not only the elderly parents but their adult children as well. Spouses can help research primary and/or specialty care for their partner.

4 FOR MANY PATIENTS, THE HEALTHCARE DECISION JOURNEY STARTS WITH RESEARCH

Whether they're new to town and seeking basic care, or need to figure out why they don't feel well, patients turn to the internet for information before they start their search for someone to treat them.

We asked survey participants to tell us how they utilize general tools like search engines and public information sources as well as the content presented by practices on their sites. Over 60% of Boomers say they use search (think Google and Bing) to find health information. Gen Z favors information directly on the practice's website. Other generations are evenly split between search, practice websites, and WebMd for health information.



Additionally, our survey found that most segments do not go directly to the social media accounts of practices when they're seeking information. However, that doesn't mean they don't see content put on social media by practices. They aren't actively looking up the Facebook page of any business, but they do see content that is shared by the practice, or their own friends and family, as they endlessly scroll and swipe through their feeds.

5 THE MOST EFFECTIVE "ADVERTISING" ISN'T ADVERTISING IN THE TRADITIONAL SENSE OF THE WORD

Millennials are the most ad-aware generation of all the segments with over 50% noticing healthcare practice advertising on social media, websites, billboards, and television. Many kinds of digital advertising may not be perceived as advertising by the most digital generation of all – Gen Z. Practices that effectively reach Gen Z are putting out videos, memes, and blog posts that are consumed as valuable information even though they raise awareness of the practice, engage prospective patients, and draw them to a practice's website.



6 PRIMARY CARE SHOPPERS ARE GUIDED BY SIX KEY INFLUENCES

After new patients have done their research, they move to deciding on what doctor to see, if they don't already have a primary care physician. What are the trusted sources of information for Southeastern patients? Our survey uncovered six of them:

- ➔ Read an online article by the doctor
- ➔ Family or friend recommendation
- ➔ Recommended by another provider
- ➔ Positive online reviews
- ➔ Insurance plan directory or profile
- ➔ Social media or news website

7 SPECIALIST SHOPPERS ARE COMMON ACROSS GENERATIONS

Interestingly, data from May 2023 reveals that individuals across all generations express varying degrees of likelihood to seek specialist care within the upcoming 12 months. Factors influencing their selection of a specialist include referrals from fellow healthcare providers, compliance with insurance prerequisites, and occasionally, personal patient preferences.



8 GENERATIONAL PREFERENCES DIFFER WHEN IT COMES TO MAKING APPOINTMENTS

Ensuring a seamless appointment setting experience is paramount once you've captured the interest of a prospective new patient. In today's digital age, where convenience reigns supreme, it's imperative to accommodate diverse preferences in appointment booking methods. Gen Z and Millennials, accustomed to the convenience of online platforms for all their needs, including scheduling activities, expect healthcare services to be no exception. For these demographic cohorts, providing an intuitive online portal or website for appointment bookings is crucial to meet their expectations and enhance their satisfaction with the healthcare experience.

On the other hand, while the younger generations gravitate towards digital solutions, it's essential not to overlook the preferences of Baby Boomers. Despite the increasing digitalization of various services, a significant portion of Boomers still prefer human assistance when it comes to tasks like setting up appointments. Recognizing and respecting this preference by offering personalized assistance can foster trust and satisfaction among this demographic, ensuring they feel valued and catered to in their healthcare journey. Balancing digital convenience with human touch is key to providing a frictionless appointment setting experience that resonates with patients across different age groups.



9 SOME GENERATIONS QUESTION THE EFFECTIVENESS OF TELEMEDICINE

Over 50% of the patients surveyed said they have tried telemedicine — which isn't surprising, since it gained popularity during the early stages of the COVID-19 pandemic. However, the effectiveness of telemedicine was questioned by all generations except Gen Z. But, satisfaction with the experience of telemedicine is highest (and nearly universal) for the youngest generation. Southeastern Millennials and older are not sold on the option.

For additional details and results-based recommendations, please see the full report: [Patient Insights Unveiled: Exploring patient care shopping habits and the impact of social media, thought leadership, and advertising.](#)



The Case for Digital Marketing in Healthcare

Results like these demonstrate the critical need for effective [healthcare digital marketing](#) to meet business goals. This typically involves creating a strong online presence through a combination of website design, search engine optimization, social media marketing, email marketing, and targeted advertising — optimizing all with a strategic omnichannel approach.

Within this framework, it's essential to clearly define the target audience, which may include:

- ➔ Current and prospective patients
- ➔ Current and prospective referring providers
- ➔ Happy patients who will recommend you to others

WEBSITE

A healthcare organization's website is often the first point of contact between potential patients and the organization. Therefore, it's important to have a well-designed site that is easy to navigate and provides relevant information about the services offered. It should also be optimized for search engines so it appears at the top of search results when patients use relevant keywords when seeking health information or care.

SOCIAL MEDIA MARKETING

Social media marketing is another important component of healthcare digital marketing. Social media platforms such as Facebook, Twitter, and Instagram can be used to engage with patients, share health information, and promote healthcare services. Content on your website can be distributed on social channels to keep patients informed about health-related news and events, as well as to promote new services and appointments.

TARGETED DIGITAL DISPLAY (MOBILE + DESKTOP)

In addition to these tactics, healthcare organizations may also use targeted advertising to reach specific patient populations. This could include using geotargeting to reach patients in a specific geographic area, or using demographic targeting to reach patients with specific health concerns. Delivering video ads via streaming services - also known as over-the-top (OTT) - can be considered as well.

DRIVING REFERRALS FOR YOUR PRACTICE

Digital marketing also plays an important role in driving referrals to your practice — and there are two types you should focus on: physician referrals and patient referrals. If you're failing to connect with both referral sources, you could be missing out on major business.

Physician Referrals

Physician referrals are what most of us think of when we talk about referrals in healthcare. According to a 2021 survey, 52% of patients report that a referral from their medical provider is the most important factor when choosing their physician. Since over half of your patients are likely being referred to you by another medical professional, how can you reach and influence them? Here are a few tips to keep in mind:

INTRODUCE YOURSELF. You may be an established practitioner that has been serving your community for many years. But new providers in your area may not know you...yet. It's essential to introduce yourself to new providers. Targeted email campaigns are an excellent tool for reaching providers who may currently be missing your networking efforts.

KEEP THEM UP TO DATE. If you are implementing new services or improving upon your current services, be sure to keep your referring providers up to date on everything you have to offer their patients. Content is key when it comes to delivering this information in a way that engages current and prospective referring physicians. Creating engaging blog posts, videos, and social media posts is the ideal way to ensure referring physicians are paying attention to your message. Utilize your website, social channels, and email to deploy your content.



MAKE IT AS EASY AS POSSIBLE. Is your contact information easy to find online? It is important to eliminate hurdles a potential referring provider may encounter. Having a user-friendly website with a dedicated space for referring providers is a must.

Patient Referrals

Patient referrals may not be top of mind, but according to Press Ganey's 2021 Consumer Experience Trends in Healthcare report, "patients rely on digital resources more than twice as much as provider referrals when choosing a healthcare provider today." It's essential to connect directly with your potential patients, and here are a few ways to do it.

BRAND, BRAND, BRAND. Building a brand patients recognize and trust is vital to driving patient referrals, and your digital presence and reputation in the community both have an impact. Storytelling is an effective brand-building tool and can be optimized with current patient testimonials, which offer a powerful way to connect with and engage your future patients.

BE MEMORABLE. Traditional and digital advertising still serve a purpose when it comes to reaching your referral base. Advertising builds brand awareness, helps you reach new patients, and keeps you top of mind for medical providers in your area. There are many advertising tools to choose from today, and it is important to select the right tactics and strategies to enable a successful marketing campaign.



BACK TO BASICS. Your branding and advertising efforts will not be successful if you don't have a basic foundation in place. Here's are a few key areas to consider:

- ➔ Is your website user friendly and up to date?
- ➔ Are you utilizing search engine optimization or search engine marketing to ensure you populate in an online search?
- ➔ Is your Google listing up to date?
- ➔ Do you have updated headshots and bios of all your providers?
- ➔ Is your social media page claimed and being updated?
- ➔ Is your information correct across all online platforms (Google, Vitals, Healthgrades, WebMD, etc)
- ➔ Do you have a well-developed logo?

Reaching both referring physicians and patients is crucial to capture all potential new patients for your practice. Each referral source requires a different message and a different strategy to reach them effectively.



The many challenges facing today's healthcare organizations make it essential to use the most effective methods available to meet business goals. This way, the doors can remain open — allowing patients and prospects continued access to the vital care they need.

By delving deep into the current healthcare landscape and leveraging insights gleaned from prevailing trends, healthcare providers can orchestrate impactful digital marketing initiatives. Collaborating with a seasoned team of experts further enhances these efforts, optimizing strategies to foster sustained growth and success.

At Advance Healthcare Marketing, we specialize in partnering with healthcare organizations to develop strategic marketing plans tailored to their unique needs and objectives. Our dedicated team is committed to developing compelling audience targeting techniques, creative solutions and messaging that resonates with patients, caregivers and referring providers. Moreover, our proven track record underscores our ability to deliver tangible, measurable results, ensuring that your marketing endeavors yield the desired outcomes.

[Contact us today.](#)