



SMITH  JONES

2019 Healthcare Marketing Trends Playbook

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Punditry for the Pundits

You've probably noticed that healthcare marketing has no shortage of authoritative voices. Smith & Jones has published lots of thought leadership over the years, so I suppose we're one of those voices now.

You've likely also noticed that there seems to be a script most experts follow. The script starts with consumerism, ends with value-based payment, and takes the occasional detour into the latest public health crisis. The script makes it easy to generate scary headlines, and it certainly helps pundits gain an audience, but I wonder: how does it help the reader?

In the short term, it doesn't. Your day-to-day work will continue to be challenging and rewarding, no matter what happens around us. And you know as well as I do that gaining a competitive advantage won't happen by leaping headlong into the hottest new technology. Rather, it will happen through incremental innovations that safely and surely extend the relevance of your brand.

Those are the kind of innovations our Healthcare Marketing Trends Playbook 2019 is built upon. Inside are thirteen predictions for decisions you'll face in the coming months. Decisions that will affect how much bang you get for your marketing dollar, and how well positioned you are as 2020 (and beyond) approaches. After all, if we can't win in the short term, the long term won't matter much, will it?

Here's to the best year yet.



Braden Russom
Account Planner



You'll spend more to improve the patient experience

Before you read any further, stop and call a local cab. I'll wait.

How was that experience? Did you have to look up a phone number? Did you get a busy signal, or hold music? Was the person you spoke with unpleasant? How accurately did they predict when the cab would arrive?

Now, stop reading again and book an Uber. Better, right? That clean, predictable experience is the reason Uber is growing like a weed.

Great customer experiences just might be healthcare's biggest brand building opportunity next year. And now that HCAHPS plays a big role in reimbursements, we think you'll shift marketing dollars towards delighting the patients you already have.



ACTION STEPS FOR 2019

Allocate budget towards culture work

More and more of our clients are asking us to help bring employees into better alignment with the organization's vision. The end goal is happier employees who, in turn, make happier patients. Everyone wins.

Understand your brand

You know that the best way to understand your brand is to ask your customers. Go deeper by reading your HCAHPS scores and look for patterns. If you're willing to share them, we'll help you analyze them (for free).

Build relationships at the front lines

Doctors, nurses and direct care staff have lots of knowledge. Building relationships with them can be both illuminating and rewarding.



You'll become more disillusioned with digital marketing



Remember when digital marketing first got popular? It promised to be better, didn't it?

Sure, it's more measurable, more targeted, and more customizable. But those features haven't truly solved the core challenges of marketing. Many people can't shake that old familiar feeling that big chunks of their marketing budget are wasted.

As evidence, consider studies estimating that more than half of impressions are fake. Consider a recent survey, in which 21% of marketing leaders said they planned to decrease their digital spend. It seems that marketing has the same challenges it's always had. We just have fancier ways to identify them.



ACTION STEPS FOR 2019

Measure what matters

What marketers want is patient volume, but what they measure is website traffic. Most of the time, those things aren't correlated. Next year, figure out how to measure what's important.

Maximize the value of free tools

Before spending on big name analytics tools, dig the insights out of your free tools. The investment will be smaller, and the timeline from analysis to insight shorter.

Consider eliminating display ads

The value of online display ads has declined since the moment they were born. Consider making 2019 the year you cut them altogether. Instead, invest in more engaging formats like Facebook canvas or Instagram stories.



Your thirst for data-driven insights will grow, and you'll outsource to quench it



Like water in the desert, consumer insights are becoming a sought-after commodity. Unfortunately, though thirst for them is growing, most health systems have trouble finding them.

The biggest reason is a skills gap. Powerful data tools are proliferating, but the people who can run them are rare. The drought goes beyond healthcare; Fortune 500's are suffering from the same talent shortage.

This skills gap will take years to fill. Most healthcare providers, especially those outside major cities, won't be able to find qualified employees. They'll need to find other ways to glean insights.



ACTION STEPS FOR 2019

Outsource to your agency

Your agency should have data people. If yours does, demand more of their attention. If it doesn't, push them to fill the role, or pursue a supplemental partnership with another agency.

Train someone on statistics

A basic knowledge of statistics can do wonders for your data analysis. It can also keep you from coming to costly, errant conclusions. Train one of your employees (or yourself) in statistics. Send them to a local college, or take a course through an online source like [udemy.com](https://www.udemy.com/).

Gather now, analyze later

Even if you're not yet sure how you'll generate data insights, start gathering data now. You'll be ahead of the game when you find someone who can help you analyze it.



You'll sell more care to millennials



Have you, like most healthcare providers, been able to blissfully ignore millennials? Due to their age, these young 'uns haven't needed high acuity care like cardiology or orthopedics.

But millennials are aging. By some criteria, the oldest millennials are 38 now. They're approaching the age where incidences of heart disease and joint trouble jump. They may even spike early for millennials, who exercise a lot more than previous generations.

Whatever their conditions, you'll need to market to them differently. That means digital platforms, holistic views of health, and brand messages that emphasize a sense of community.



ACTION STEPS FOR 2019

Take your digital presence beyond advertising

Millennials expect digital devices to contribute to their health. Think of ways to add value to their lives through the devices they own. The channel most ripe for reinvention is the electronic health record, but there are other ways, too.

Get smart on millennial health habits

So much has been written about millennials and health care. Read up, starting with our white paper, [Healthcare Consumers: the New Reality](#), or the sources list at the end of this ebook.

Evaluate your brand

Millennials expect different things from brands. Chief among them are social responsibility and transparency. If your brand doesn't align with millennial values, you'll miss the critical moment when they first need your services.



You'll have to contribute to the wellness of the greater community, beyond your patients



Today's consumers expect companies of all types to contribute to their wellness. Unsurprisingly, healthcare providers shoulder some of the highest expectations.

Specifically, consumers expect healthcare providers to do three things. First, to educate the public on health topics. Second, to support the health of local communities. Third, to help their employees live healthier lives. Most providers already do these things. The challenge is to scale them in ways that provide that oh-so-valuable halo effect. Think of the buzz CVS generated by eliminating tobacco from their shelves.

In markets further along the path to value-based care, wellness initiatives feel less like marketing and more like smart business. The healthier your community is, the less likely they are to need expensive care. That's a win for everyone.



ACTION STEPS FOR 2019

Benchmark your community's wellness

Gallup has been studying wellness across nearly 200 communities for years. There's a good chance they studied your community. You can find your rankings [here](#).

Get sickness out of your ads

So much healthcare advertising unwittingly associates brands with sickness. It happens when ads feature doctors, buildings and machines, things patients hope they never see in person. Instead, build campaigns around stories of wellness.

Be a noodle

Wellness isn't something you achieve once and for all. It's about continual improvement. Use ideas from behavioral economics (more on this next) to nudge your community toward wellbeing.



You'll embrace behavioral economics



2019 is the year to get familiar with behavioral economics, the study of irrationality in human behavior. It has massive potential for health care. Ethically leveraging it could mean everything from more effective advertising to more patient appointments. Done properly, it could even play a role in reducing unnecessary utilization.

The field holds lots of potential, but it's been a blind spot in health care marketing. It's likely to continue that way, and that's good news for you. Being first to the table puts a powerful innovation at your fingertips.



ACTION STEPS FOR 2019

Brief yourself

For a fun, engaging take on behavioral economics, read *The Undoing Project*. For a quick take, check Wikipedia. For an infographic you can hang on your wall, Google the *cognitive bias codex*. To indulge your inner nerd, read *Thinking, Fast and Slow*.

Ask your agency

Behavioral economics exposes a lot of opportunities, especially in digital marketing. Ask your agency what kinds of principles they're employing and how.

Look for opportunities in owned media

Exam rooms and waiting rooms are great places to leverage behavioral economics. Tour them, thinking of ways to use a patient's wait time to nudge them in a beneficial direction.

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You'll increasingly be a victim of The Netflix Dilemma

If you've ever found yourself endlessly scrolling through Netflix you've experienced what I call *The Netflix Dilemma*. The Netflix Dilemma is this: the more choices a person has, the less likely they are to pick any of them. Scientists call this Hick's Law.

As care providers proliferate, The Netflix Dilemma will affect more and more consumers. They must choose between telemedicine and in-person visits. They must choose amongst primary care, urgent care, emergency care, and minute clinics. They must choose amongst your brand and all the others in the market.

This is a market share double-whammy. Each new provider to the market steals share from the others. That's obvious. What's not so obvious is that the market itself shrinks. More potential patients get stuck in The Netflix Dilemma and don't seek care from any provider.

It turns out, less truly is more.



ACTION STEPS FOR 2019

Invest in your brand

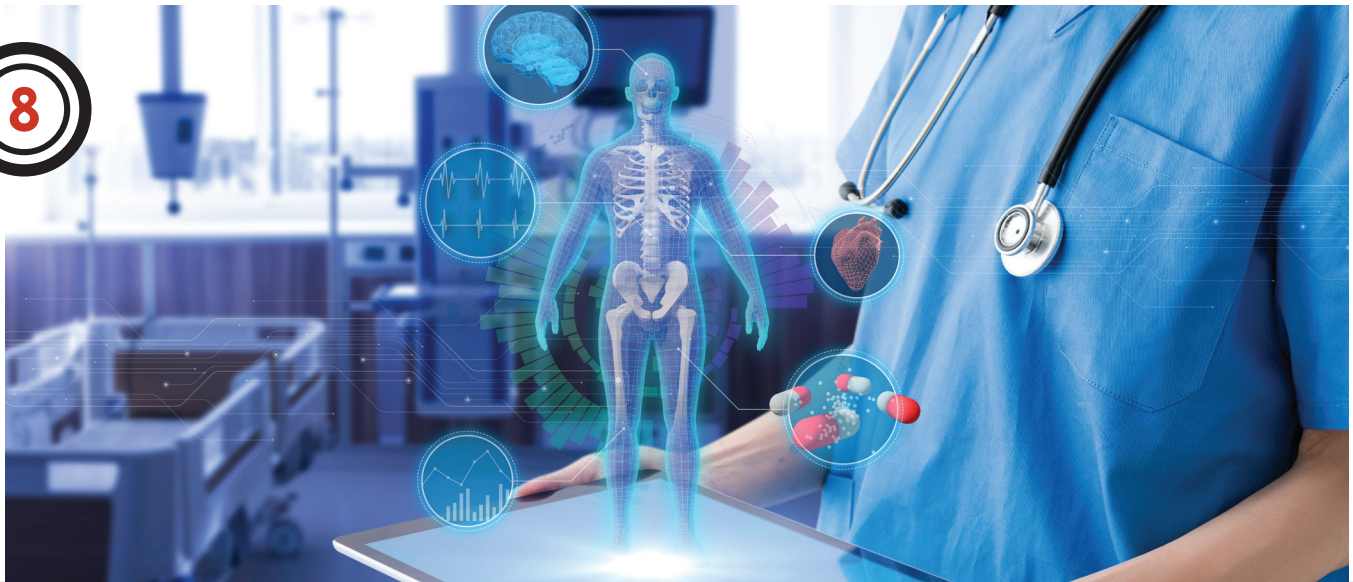
Consumers rely on brands to simplify choices. That's why products that are nearly identical (think Coke and Pepsi) have such fiercely loyal fans. Building powerful, trusted brands is the winning move in a fracturing market.

Think about patient capture

In fracturing markets, the winners are the ones who can shore up the biggest piece of the pie. There are few channels better than primary and urgent care. If you have capacity in these service lines, advertise them, and keep an eye on downstream revenue. For bonus points, start measuring patient lifetime value.

Consider strategic pricing approaches

Cost is a big barrier for healthcare consumers. Forward-thinking marketers understand what a massive opportunity this is. They'll figure out how to use pricing as a branding tool to cut through the clutter. We published pricing ideas for [elective surgery](#), [primary care](#) and [urgent care](#) on our blog.



The hype around cutting edge martech will grow, but you won't buy it yet

There's a lot of hype around technologies like artificial intelligence and virtual / augmented reality. But marketers, by and large, think it's hot air. In fact, a recent poll showed that marketers think AI is the most over-hyped concept in our field. Gartner saw the same thing. Artificial intelligence is right near the peak of their brilliantly entertaining hype curve.

For all its future potential, AI's practical applications in health care marketing are few and untested. They're generally limited to gleaning insights from data and performing basic customer service. We're just not yet in a place where these technologies are worth a big investment. You'll be smart to wait another year (or more).



ACTION STEPS FOR 2019

Use what works

One good use case for AI is parsing the emotions behind social media reviews. We've been using IBM's Watson to do this for a few years, and the insights are fascinating.

Hang back

The sensitive nature of healthcare keeps the industry off the bleeding edge of new marketing technology. That can be a good thing. For AI and AR, we'll be smart to let the retail and travel industries work out the kinks.

Test the waters

Some martech platforms offer free trials. I say go for it. Testing is a great way to get a sense of their limitations, and maybe even shake loose an insight or two.



You'll start tailoring content along the lines of first and second opinions



Patients experiencing a new symptom used to call their doctor for diagnosis. Today, most people just ask Dr. Google. Only after that do they call their doctor, which means the doctor's first opinion is now a second opinion.

This has big implications for your content marketing. To win the patient, develop content that helps people find a first opinion and moves them toward a consultation.



ACTION STEPS FOR 2019

Make better content

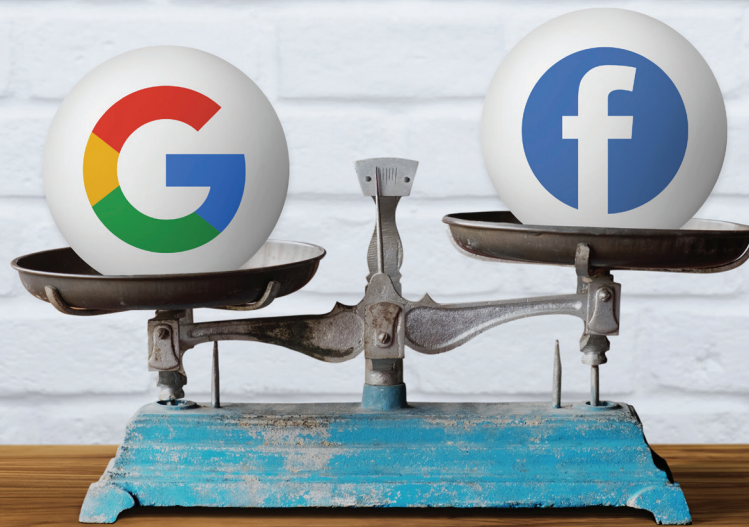
Physicians don't like to give advice outside of the exam room. And while they have good reasons, content marketing will be won by those who can prove expertise, authority and trustworthiness. In short, doctors.

Make more content

Chances are that your content only captures a small percent of the results for a given query (we call this search share). The way to grow your share is to publish more. Gradually, you gain more and more share in places where you have valuable expertise.

Make more than just content

Brand awareness is still a key way people decide who to buy care from. Successful marketers know that, and use mass media to keep their brand top of mind. It puts less pressure on their content to do all the heavy lifting.



You'll rejigger your mix of paid search and social

2018 has been tough on Facebook. Scandal led them to drop their most interest-based marketing, and changing consumer expectations led them to devalue unpaid brand posts. Suddenly, marketers got less bang for their buck. It all culminated in a \$120 billion loss; the biggest single-day market cap loss for any US public company.

Look for marketers to react in two different ways. Some will shift a bigger chunk of their paid digital budgets to Google. Others will double down on Facebook, trying to recapture lost revenue. Either way, the scales will tip.



ACTION STEPS FOR 2019

Think through your goals

Facebook and Google each have strengths and weaknesses. Choose based on a crystal clear vision of the business outcome you want to generate.

Be careful with direct buys

Digital offerings from specific publications can be tempting, but they often don't deliver ROI. Of course, the right direct placement can help with awareness or reputation. They're hard to measure, but important.

Iterate

The beauty of digital marketing is how easy it is to optimize. Adopt a mindset of continual improvement, and iterate your ads until they're delivering maximum value.



Consumers will look for cheap, safe ways to self-treat their conditions



No household expense is growing faster than healthcare. That's troubling, and the news gets worse. Real wage growth has been stagnant for decades. For most people, this pushes healthcare further out of reach every year.

To cope, people are looking for cheap, safe ways to treat their own conditions. Take broad cultural movements like food as medicine, or the newfound popularity of mindfulness meditation as examples. Big cities even have business models built around the consumer need for cheap care. Clean-air bars and nap pods serve the wealthy and wannabe-healthy. And let's not even get started on Goat Yoga.

What do these things have in common? They're cheaper and more convenient than a visit to the doctor.



ACTION STEPS FOR 2019

Leverage the doctors

Getting physicians involved in content marketing is a big challenge. The health systems that make it work stand to help their communities and win customers. Check out Cleveland Clinic's YouTube channel for inspiration.

Bust myths

There's always a new trend in the wellness industry (remember kale?). A physician's take on the latest craze brings much needed realism to hype-heavy topics. It can also bring much desired attention to your brand.

Offer cheap, safe ways to treat conditions

Everyone could benefit from the advice of a nutritionist, and every health system has one. Work with them to develop content that helps people live a healthier lifestyle.



You'll have higher expectations for digital creative

Google and Facebook make it easy for everyone to launch ads. And it seems like everyone has; there's been an explosion in the sheer number of ads launched every year. To give you some sense of scale, Google purged 3.2 billion misleading ads last year. That's twice as many as 2016.

As the quantity of ads goes through the roof, consumers will tune more of them out. And that makes quality creative more valuable. For all the prophecies that martech would kill creative, it seems the opposite may be true. Creative may be what redeems digital marketing for us all.



ACTION STEPS FOR 2019

Foster collaboration

Many organizations have one agency that handles creative and another that handles media buying. Find ways to bring the two together. Good left-brain, right-brain relationships make the whole team more effective.

Consolidate responsibilities

Many creative agencies have roots in media buying. If collaboration isn't working, ask your creative agency to handle your media buying.

Have high creative standards for digital ads

Don't let your vendors get away with treating digital components as an after thought of TV ads. Each of the big advertising platforms has their own uniquely engaging formats, and they should be approached with high creative standards.

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You'll move beyond website traffic

Facebook and Google are keeping more and more web traffic to themselves. Through innovations like embedded video and knowledge graph, they've made click-throughs less necessary. And that means it's harder for marketers to garner traffic.

This is a big shift, and many marketers will get stuck on it. Rather than change models, some will just spend more money to keep traffic growing. Others will evolve, and largely stop measuring website traffic. These marketers will focus their digital efforts on building frictionless experiences across channels. They may find ways to use Google to book appointments right from an ad. Or use platforms like Facebook Live to meet prospective patients on their terms.



ACTION STEPS FOR 2019

Publish your content everywhere

Your most utilized content must have a presence on search and social. Things like hours of operation, phone numbers, directions, ratings, and interviews with physicians. Make it easy for people to find this, no matter what platform they use.

Filter your traffic

I'd bet 50% of your current website traffic isn't from potential patients. It's bots, scrapers, and traffic from outside your service area. Clean that stuff out to get a much clearer picture of the people who might actually buy from you.

Direct your team to what matters

Website traffic is easy to measure. But that doesn't make it valuable. Better to focus your team on new patient acquisition, brand awareness and booked appointments.

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