SMITH JONES POWERED BY overit | Healthcare Marketing Trends Report **2024**

THE YEAR OF DISRUPTION

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It's here.

Disruption. As we navigate the healthcare landscape together, it has become increasingly clear that the industry is seeing profound transformation and change. The decision to title our eleventh trends report "The Year of Disruption" stems from the undeniable fact that the healthcare industry has experienced a seismic shift, setting the stage for new opportunities and challenges in 2024.

In this report, our team explored several key trends that have accelerated in recent months. One of the paramount trends is the remarkable surge in patient empowerment and consumerism. Patients are no longer passive recipients of care; they are empowered individuals who actively engage in their health journey, demanding more transparency, personalization, and control. This has given rise to a new era of patient-centric care (and marketing), reshaping how healthcare providers and organizations interact with their clientele.

Furthermore, we examine the fascinating phenomenon of retailers rapidly expanding into new healthcare markets. Amazon, Walmart, Best Buy, and even Dollar General are redefining traditional care models and enhancing accessibility. As these retailers enter the healthcare market, we see a convergence of services catering to the convenience-seeking, empowered consumer.

The importance of patient-centric communication strategies becomes even more evident. Establishing genuine connections and trust with patients has never been more critical. Our report underscores healthcare organizations need to shift their communication strategies towards a patient-focused approach, fostering lasting relationships and ensuring mutual understanding.

Artificial Intelligence (AI) has emerged as a pivotal force in healthcare, promising efficiency, accuracy, and innovation. Its potential to revolutionize healthcare is immense, but its successful integration requires careful consideration of ethical, privacy, and security implications.

Lastly, our report addresses the chronic challenge of employee recruitment and retention. The demand for skilled professionals continues to outpace supply, forcing hospitals and health systems to explore creative strategies for attracting and retaining top talent. We explore various approaches to help organizations maintain a motivated and engaged workforce.

So, on behalf of Katie, Lisa, and everyone at Smith & Jones, I thank you for investing your time in reading this report. We hope this report will serve as a guiding light, helping you chart a course that aligns with the dynamic healthcare landscape and consumers. Here's to a year of adaptation, innovation, and growth.

Paul Fahey
Vice President, Smith & Jones

Paul Fahey
Vice President

Lisa Barone
VP, Brand

Katie Sorce
Marketing & Content Strategist

I'm excited to share my thoughts with you on Smith & Jones' latest healthcare marketing trends report, "The Year of Disruption." As someone deeply invested in healthcare consumerism through the Consumer-First Health Group and the Healthcare Rap Podcast, I am thrilled to see these themes come to life in such a comprehensive manner.

The report delves into the concept of healthcare consumerism, which has been at the heart of the discussions my colleagues and I have been having for years. It's about everyday people stepping into a more active role, empowered to make informed decisions about their health. This idea isn't just a buzzword; it's a fundamental shift that's redefining the entire healthcare landscape.

"Disruption" is indeed an apt term for the changes we're experiencing. Patient empowerment, the fusion of retail and healthcare, patient-centric communication, the ascent of artificial intelligence, and the ongoing challenge of recruitment and retention—all these facets are interwoven threads of the larger tapestry of healthcare transformation.

Embracing these themes isn't just a choice; it's a necessity. As the industry evolves, those who grasp the essence of healthcare consumerism and adapt their strategies accordingly will be best positioned to thrive. This report offers a roadmap to navigate the shifts, providing insights that can shape your planning for the year ahead.

Change can be daunting, but it also presents unprecedented opportunities. By embracing the principles of healthcare consumerism and understanding its implications, you're not just preparing for the future—you're shaping it. You have the chance to contribute to a healthcare landscape that's patient-focused, technologically advanced, and adept at attracting and retaining top talent.

So, as you read through the report, I encourage you to reflect on these themes and consider how they resonate with your own experiences and aspirations. Let's work together to be at the forefront of change, driving innovation, and ushering in a new era of healthcare.

Warm regards,

Jared Johnson

Founder, Shift Forward Health

TREND ONE

The Acceleration of Patient Empowerment and Consumerism

In the past, the healthcare system was characterized by a hierarchical structure, with the revered physicians at the apex and patients taking a passive role in their care. However, the era of the empowered patient has accelerated rapidly, reshaping this dynamic. Several factors have contributed to this shift:

- **Access to Information:** The launch of WebMd in 1998 democratized healthcare information, giving patients the tools to research symptoms, diagnoses, and treatment options. Today, a whole new generation has come to expect the ability to enter medical consultations armed with knowledge, seeking a more collaborative approach.
- **Wearable Technology:** Devices like the Apple Watch and FitBit encourage (and often game) patients to monitor their health in real time, promoting proactive self-care.
- **Online Communities:** Online support groups and social media platforms allow patients to connect with others facing similar health challenges, creating a sense of community and shared experiences.
- **Health Apps:** Mobile apps provide patients with tools for medication tracking, appointment scheduling, and telehealth services, giving them greater control over their healthcare management.
- **Personalized Medicine**: Genomics and personalized medicine advances enable patients to receive treatments tailored to their unique genetic profiles.

Consumerism, a concept traditionally linked to retail and entertainment, is now an influential force in healthcare. Patients increasingly view healthcare services as commodities to be evaluated and chosen rather than necessities to be passively accepted. Key drivers of consumerism in healthcare include:

- **High-Deductible Health Plans:** The prevalence of high-deductible health insurance plans requires patients to actively manage their healthcare costs, driving them to make informed choices.
- **Price Transparency:** Initiatives promoting healthcare price transparency, such as online tools and apps, and Walmart's rate card, empower patients to compare the costs of medical services, fostering cost-conscious decisions.
- **Reviews and Ratings:** Healthcare providers face scrutiny through online platforms, where patients share their experiences and ratings. Patients are increasingly making choices based on peer reviews.
- **Retail Clinics:** Convenient and cost-effective retail clinics in settings like pharmacies and supermarkets cater to non-emergency care needs, aligning with consumer-driven preferences.
- **Telehealth:** Telehealth services enable patients to access care remotely, offering convenience and choice in healthcare delivery.

Implications for Marketers

The confluence of patient empowerment and consumerism has far-reaching implications for healthcare marketers

- **Patient-Centric Marketing:** Healthcare marketers must pivot their strategies to focus on patient-centered approaches. Tailoring communications and services to meet individual patient needs, preferences, and values will be crucial.
- **Digital Engagement:** As patients increasingly use digital tools and platforms to manage their health, healthcare marketers should invest in digital engagement strategies, including telehealth marketing and online communities.
- **Transparency and Trust:** Emphasizing transparency in pricing and outcomes data will be vital in a consumer-driven healthcare environment. Building trust through clear, honest communication is key. The first step to this is education through video, webinars, and related tools.
- **Messaging Your Innovation:** Healthcare marketers should emphasize innovative technologies and services available, especially how they improve patient outcomes and experiences. From valet parking to robotics, these are all part of an empowered consumer's expectations.
- **Data Privacy and Security:** Healthcare marketers must prioritize data privacy and security in their marketing campaigns and practices to maintain patient trust as healthcare becomes more data-driven.

As traditional healthcare business models evolve to meet these challenges, healthcare marketers must adapt their strategies accordingly. Healthcare marketers have a unique opportunity to lead the charge in delivering patient-centric, value-driven healthcare experiences, ultimately benefiting patients and the industry as a whole.

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TREND TWO

Beyond Advertising: The Role of the Patient Journey in Brand Perception

Hospital executives allocate significant resources to advertising and marketing efforts to build and maintain a positive brand image. (Occasionally with a tone of reluctance.) While these strategies are important, they only scratch the surface of what truly influences a patient's perception of your hospital's brand. Today, we must acknowledge that the patient's journey through your system, encompassing every aspect from paperwork to parking garages, plays an integral role in shaping brand perception.

Healthcare is not merely about providing medical treatment; it's about delivering care in a way that makes patients feel valued, respected, and comfortable. The patient journey is a comprehensive experience, starting from the moment they make an appointment and extending through their entire encounter with the healthcare system. Every touchpoint, from initial interactions with administrative staff to the quality of care received, contributes to how a patient views your brand.

Imagine a patient arriving at your facility, searching for a parking spot, and navigating through a labyrinthine maze of hallways to reach the reception desk. Such experiences can leave a lasting impression, often overshadowing the excellent medical care provided. First impressions are powerful, and they extend beyond the clinical encounter. Patients remember the hassle of filling out extensive paperwork, the cleanliness of the facility, and the ease of finding their way around.

Another critical aspect of the patient journey is how staff interact with patients. Every encounter, whether a receptionist, nurse, or physician, contributes to the patient's perception of your brand. Patients appreciate when they are treated with empathy and respect by healthcare providers who take the time to listen to their concerns. Conversely, negative interactions can mar the entire experience, leading patients to associate those negative sentiments with your brand.

The physical environment of a healthcare facility is another essential factor. It helps to think of this the way an airline passenger might look at a dirty tray table in front of them. Cleaning it is one of the simplest tasks on this complex machine, but if the airline can't handle that, I wonder how well they maintain their engines. We want to avoid these fears at 36,000 feet or in the hospital's waiting room. A well-maintained and welcoming environment can put patients at ease, making them more likely to have a positive view of your healthcare system.

Implications for Marketers

For healthcare executives, understanding the depth of the patient journey's impact on brand perception opens up new avenues for improving patient satisfaction and loyalty. Here are some key implications for healthcare marketers:

- **Invest in Employee Training:** Train all staff, from administrative personnel to clinical teams, in empathy, communication, and customer service skills. Make sure every patient interaction is positive and on-message with your brand differentiators.
- **Streamline Administrative Processes:** Simplify paperwork, appointment scheduling, and billing processes to reduce patient frustration and enhance their overall experience.
- **Enhance Facility Aesthetics:** Continuously assess and improve the physical environment to create a welcoming and comfortable patient atmosphere.
- **Emphasize Convenience:** Implement digital solutions such as online appointment scheduling, telemedicine options, and mobile apps to enhance convenience and efficiency.
- **Gather Patient Feedback:** Use patient surveys (actually use them) and feedback mechanisms to understand their experiences and identify areas for improvement in the patient journey.
- **Align Marketing with Reality:** Ensure your marketing materials accurately reflect the patient experience, avoiding exaggerated claims that may lead to disappointment. Don't hesitate to pause a marketing campaign until the service line is ready to live the brand.

While advertising and marketing are essential, they must be complemented by a commitment to providing patients with a holistic, positive experience.

TREND THREE

3 Patient-Centered Language Takes Center Stage

With disruptors gearing up to pour investments into healthcare content, marketers within traditional systems must get serious about crafting crystal-clear content that is effortlessly digestible and brimming with practical insights.

Patient-centered language helps your audience:

- **Find what they're looking for**
- **Understand what they find**
- **Use what they find to meet their needs**

We recently had the pleasure of hearing our colleague Ahava Leibtag of Aha Media Group speak at the 2023 NESHCo Annual Conference. In her keynote, What Patient-Centered Language Really Means, we learned several valuable lessons regarding patient-centered language and some important best practices.

We know the healthcare system is complicated, which is precisely why patients are seeking other alternatives. People are stressed after the emotional toll of the COVID pandemic and amidst ongoing economic challenges. This stress makes it hard for our brains to understand complex information. Users won't stick around if your website feels overly complex, difficult to navigate, or contains confusing jargon. They'll look for other options. So don't make your patients think hard! Make it as easy for them as humanly possible.

Complexibility does not equal authority.

According to the National Library of Medicine, most adults (9 out of 10!) have difficulty understanding health information (also called health literacy). Add to that a highly emotional situation like dealing with a health scare for yourself or a loved one. The heightened emotions will make complicated language even harder to understand. Help your patients by using simple, straightforward language to guide them on where to go and what to do next.

Marketers and doctors alike love to use words like "cutting edge," "advanced," "state-of-the-art," et cetera when describing medical services (be honest, we've all done it). But when patients make a potentially life-altering decision, they may be drawn to more emphatic words like "compassionate" and "patient-centered." After all, if they are researching multiple choices, and everyone claims to be "cutting-edge,"... are they? They'll probably choose the organization that's easiest to understand and talks to them like an actual human.

Here are some tips to get started with plain language:

- Use active voice and "you" pronouns
- For web or blog copy, use headings and the F-shape pattern to make content skimmable
- Include the most important info at the top of the page
- Use bullet points instead of long sentences
- Use pictures or infographics
- Use metaphors
- Try to lead with the positive, not scary information
- Use a tool to give you a readability score for feedback on what needs to be simplified
- Use everyday words, and if you have to use technical terms, explain them at the beginning

Remember, the disruptors are used to using consumer-centered language. Traditional healthcare? Not so much. Before, consumers didn't have a choice. They had to wade through technical jargon in hopes of finding the service they needed.

But now they have more options.
Make sure they choose you.

Implications for Marketers

How can you immediately start working to make your content more consumer-friendly? Here are some next steps:

- **Audit your content:** Review your existing website, print, and marketing materials. Look at them from the point of view of a patient who knows nothing about this service. Or better yet, have an actual patient or layperson review it for you. Is it straightforward and easy to understand?
- **Look to the disruptors:** Research how the disruptor brands are talking about their services to consider how you can compete and differentiate yourselves.
- **Review your blog:** If you have a blog, review your content and traffic data. Are you creating content centered on patient's needs and questions rather than just pumping out content around the service you want to promote? Our friends at Hartford Healthcare have a fantastic, consumer-friendly and patient-centered blog.
- **Identify a Plain Language Champion:** Identify and assign someone in your organization to be a plain language champion to advocate for plain language and review/edit your content. It would also be helpful to assemble a style guide that multiple team members can refer to.

More Resources

- Centers for Disease Control and Prevention
- Public Health Communications Collaborative

TREND FOUR

4 Getting Comfortable with the Uncomfortable: The Role of AI in Healthcare

AI will revolutionize how healthcare providers diagnose, treat, and deliver healthcare. But what is the role of AI when it comes to marketing?

AI is a tool. Hopefully, one that will help us do our jobs more efficiently. However, unlike other industries that can quickly jump into testing out AI content, digital marketing tactics, or operations processes, healthcare should remain more cautious. We've already seen one lawsuit where a health insurance company was trying to use AI to speed up its claims process without proper human oversight.

In healthcare, people's lives and health are at stake with everything we do. We can't forget that for the sake of efficiency.

Trust is everything

We know our brand reputations are everything, so healthcare marketers need to be especially careful when using AI for content. When using a tool like ChatGPT, it's important to remember that the information is coming from the internet. And after COVID, we've seen firsthand how much inaccurate and sometimes downright harmful health information is available on the internet. Not to mention, these AI algorithms are nowhere near perfect and can provide false information. We'll have to see if anything comes from the FTC's current investigation into ChatGPT over potential consumer harm.

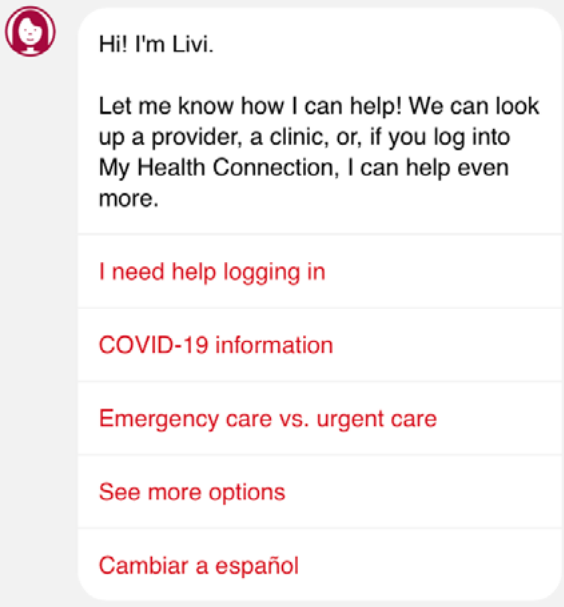
If you do decide to experiment with an AI tool for content ideation–do so, but do it carefully.

And fact check, especially for anything that is consumer-facing! It's not worth risking your reputation and your patient's trust by putting out possibly false information.

Here are some practical ideas for using AI that you can start trying out now:

For content creation and ideation:

- Expedite research time or help you spark ideas
- Help you reformat existing content
- Help come up with headlines or headings
- Identify hashtags and related topics
- Help identify influencers
- Help with rewording content for A/B testing
- Help with proofreading and grammar
- Analyze and improve your website SEO



According to a Becker's article from March 2023, here are some ways hospitals are currently using AI:

Mass General Brigham

Integrating AI-driven tools to provide real-time consumer and market intelligence.

Renown HEALTH

Using AI to inform their SEO strategies based on conversational search terms and long-tail keywords.

uchealth

Started using their virtual assistant Livi in 2019 to help visitors find what they need.

Northern Light Health

Implemented a chatbot to answer COVID-19-related questions during the pandemic.

In the following year, we'll be sure to see more hospitals and systems publicizing AI innovations, and we'll have to see if the reaction from the public remains positive and if any more lawsuits come up. For now, tinker with AI and see how it can help your system, but remember, your people will always be your greatest asset.

Implications for Marketers

Here are some ways we see using AI for healthcare in the next year:

- **AI as a content tool:** Do use AI to assist with research or content ideation, but don't use for consumer-facing content.
- **AI for customer service:** Consider investing in a chatbot tool. Consumers are used to having their questions answered instantly, but this is rarely the case in healthcare. Letting them chat can help them answer their initial questions—like how to book an appointment or where they can access helpful content.
- **AI for operations:** Consider integrating AI into your backend operations processes to ease administrative burden.

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TREND FIVE

Navigating the Unyielding Workforce Challenges in Healthcare

Workforce challenges have plagued the healthcare industry since the 1930s (yep, you read that correctly), and it's time to accept that these issues are here to stay. The acute nature of the post-COVID labor market demands immediate attention and a commitment to long-term solutions. Factors such as an aging population, increased demand for healthcare services, and the retirement of experienced professionals have exacerbated the problem. The COVID-19 pandemic only intensified the pressure on healthcare systems globally, further highlighting the need for a robust and sustainable healthcare workforce.

While workforce challenges have always existed, the current situation is particularly acute. Shortages of healthcare professionals, especially nurses and physicians, have reached alarming levels in many regions. Overworked and burnt-out healthcare workers have been stretched to their limits, compromising patient care and safety. The gravity of the situation demands immediate action and a recognition that quick fixes are insufficient.

Addressing the persistent workforce challenges in healthcare necessitates a commitment to long-term solutions. One of the most crucial steps is increasing enrollment in nursing schools. Nursing shortages are at the forefront of the healthcare workforce crisis, and boosting the number of nursing graduates is paramount. To achieve this, healthcare institutions, governments, and educational bodies must collaborate to provide financial incentives, scholarships, and training programs that make nursing education more accessible.

Preventing burnout is equally vital to ensuring a sustainable healthcare workforce. The emotional and physical toll on healthcare professionals has been overwhelming, leading to high turnover rates and decreased job satisfaction. Healthcare organizations should invest in comprehensive well-being programs, mental health support, and workload management strategies. This will improve the overall quality of care and make the profession more attractive to potential recruits.

To relieve the pressure on healthcare workers and improve patient outcomes, healthcare institutions must prioritize increasing staffing levels. This means hiring more professionals and implementing effective workforce management strategies to ensure optimal utilization of resources. Flexible work schedules, appropriate nurse-patient ratios, and supportive work environments are key components of such strategies.

Implications for Marketers

Marketers, especially those working in hospitals and healthcare institutions, are crucial in addressing workforce challenges. They should consider the following implications:

- **Partnerships with Colleges:** Hospitals and healthcare organizations can form partnerships with colleges and universities to create pipelines of skilled healthcare professionals. Collaborative programs, internships, and tuition reimbursement can attract students to healthcare careers and provide them with a clear path to employment.
- **Cooperative Marketing Campaigns:** Marketers can launch cooperative marketing campaigns that emphasize the nobility and necessity of healthcare as a profession. These campaigns should highlight healthcare professionals' positive impact on society and promote the fulfillment of serving in such a vital role.
- **Attracting Prospects with Enthusiasm and Nobility:** Marketing efforts should target individuals passionate about healthcare and patient care. Highlighting the rewarding aspects of the profession, such as making a difference in people's lives, can attract genuinely enthusiastic candidates to join the healthcare workforce. This is especially true for entry-level positions, such as CNAs, who can earn the same pay in retail or fast food.

The workforce challenges in healthcare are undeniably here to stay, but they are not insurmountable. Marketers, especially those in the healthcare sector, have a pivotal role in attracting and retaining passionate individuals who understand the nobility and necessity of healthcare.

Smith & Jones is where healthcare brands come to get better.

We're a full-service healthcare marketing agency specializing in branding, service line campaigns, and retention and recruitment for hospitals, health systems, and other healthcare providers.

Need help adjusting to the disruption?
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