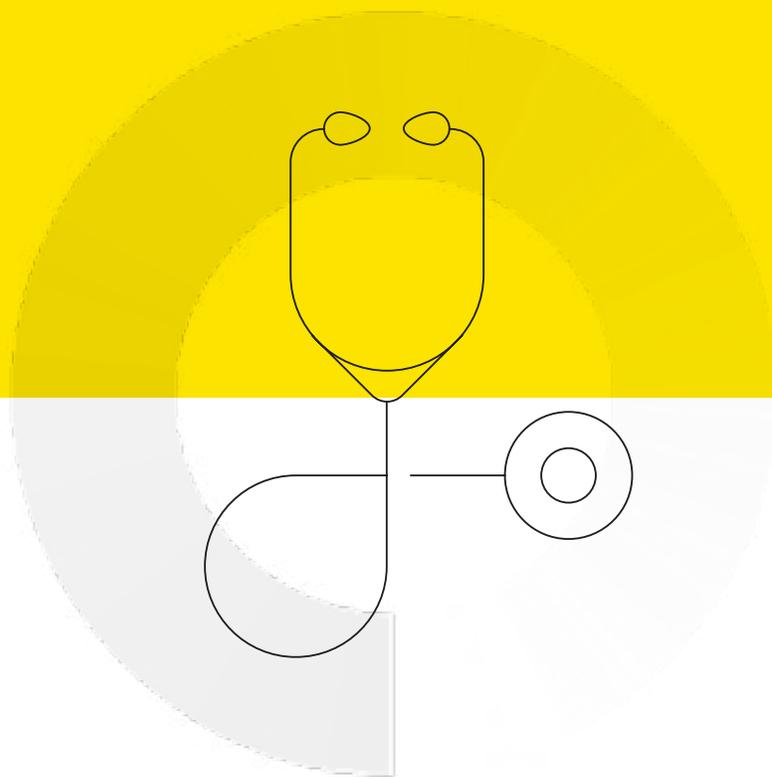# Healthcare Digital Marketing Trends

2021 is all about accelerating possibilities for affordable access to consumer industry-grade care

r2i

Executive Overview

Healthcare is an industry that simultaneously innovates while also being slow to evolve. Having one of the most complex healthcare systems in the world, changes within the industry are resultantly laggard. While research institutions are making breakthroughs on treatments every day, many healthcare marketers are struggling to keep up with their consumer industry counterparts. To better understand the evolving future, it helps to have a deeper understanding of the industry's complexity.

R2i anticipates major shifts in the way healthcare marketers can and will reach prospective patients, driven by internal and external forces, requiring marketers to innovate and transform. Those transformations will come from a number of key healthcare digital trends:

Data Management in Service to Data-Driven Marketing

Seamless, Measured Patient Experiences That Deliver Value

Mitigating the Rising Costs of Healthcare

Keeping Up With Patient Preference for Alternative Care Locations

AI Enabling More Self-Serve Service and Support

Integration With Telehealth and Wearables

01

Data Management in Service to Data-Driven Marketing

50%
Healthcare Companies

50% of all healthcare companies will have resources dedicated to accessing, sharing, and analyzing real-world evidence for use across their organizations.[1]

Data Management in Service to Data-Driven Marketing

The convergence of data expansion, technology integrations, and value-based payments is revolutionizing the way that healthcare providers engage with patients and the ecosystem.

Data has been on the tips of marketer tongues for quite a while now, asking how to get better data, how to clean data, how to derive better insight from data — and this is truly coming to fruition within the healthcare space in 2021. Organizations are starting to see the value in having better data management practices and what outcomes data-driven marketing can secure. Frost & Sullivan, a global research firm, predicts that "50% of all healthcare companies will have resources dedicated to accessing, sharing, and analyzing real-world evidence for use across their organizations."[2] This means healthcare marketers are going to be able to make smarter decisions at a faster pace than they ever have before.

In terms of data storage, Forrester Research predicts that blockchain will not be a key concern for healthcare because it is still too early in the adoption cycle to become a true force[3]. However, knowing that blockchain is coming allows healthcare organizations to ideate and prepare for how that will impact their practices and revolutionize the way they collect data, store data, and access data to better care for and communicate with patients.

The integration of marketing data and business data is going to be absolutely vital to success in 2021. Only looking at channel-based metrics will no longer be enough to justify the return on marketing spend. To keep up, healthcare marketers are going to have to understand or create their conversion points and combine with business-level data to be able to truly understand what is driving patients and referrals, and thus moving the needle for their organizations. Data visualization platforms will help with this, but many healthcare organizations will need further investments in technology to support these efforts.

02

Seamless, Measured Patient Experiences That Deliver Value

The tech revolution has changed patient expectations of technology experiences where the healthcare industry struggles to keep up. Healthcare marketers are not just competing with other hospitals and doctors in terms of patient experience, they are competing with the Targets, Ubers, and Disneys of the world. Salesforce reports that 80% of customers say the experience a company provides is as important as its products and services[4].

Today, marketers operate in a world where consumers do not trust their healthcare provider to make the right decisions for them; they want to connect with brands on an emotional level, and it is marketers' jobs to make our patients feel more connected and more like themselves.

The adoption of technology within the healthcare space has been slow and steady but is finally reaching a point where major health systems can provide basic functions, such as booking an appointment or communicating with a doctor - online. However, these initial experiences in many cases are far behind customer expectations. 71% of customers now expect companies to communicate with them in real time[5]. Clunky systems not built with patient experience and marketing analytics in mind create unintended consequences and gaps in the patient experience.

63% of healthcare organizations believe they are delivering on patient care, while only 43% of patients actually agree[6].

51% of surveyed patients would change their health care provider
for great customer service[6]

79% of consumers were more likely to select a provider who allows them to conduct health care interactions
online or on a mobile device[6]

72% of consumers said the use of
technology is important
to them when managing their health[6]

WE'RE NOT MARKETING TO CONDITIONS AND DIAGNOSES.

WE'RE MARKETING TO PEOPLE.

SO LET'S ACT LIKE IT.

Marketers can act as the voice of the patient within the system. A focus on a seamless patient experience while tracking key metrics will ensure that you can assess the value of the patient experience and better plan future engagement strategies.

03

Mitigating the Rising Costs of Receiving Care

With the passing of the 2010 Affordable Care Act, access and cost have been front and center in any conversation about healthcare. Private insurance rates have been increasing almost yearly for employers and patients, with providers trying to maximize reimbursements, and as a result the most recent McKinsey CHI survey reports that over 72% of healthcare consumers are expressing concern about at least one type of healthcare expense[7]. Taking that further, many consumers are switching to high-deductible plans in an effort to cut overall insurance costs, but still, 52% of those consumers say it would be hard to afford the deductible according to PwC[8]. This leaves a market ripe for disruption.

72%
Healthcare Expense
Over 72% of healthcare consumers are expressing concern about at least one type of healthcare expense[7].

And, the disruption is starting. Traditionally non-healthcare companies like Amazon have started to enter into the market in an effort to improve the delivery of healthcare, while optimizing costs. In mid-2018, Amazon partnered with JP Morgan Chase & Co and Berkshire Hathaway with the intent to improve care, increase care satisfaction, and better cost efficiency for the combined more than 1M people the 3 companies employ. By targeting waste in administrative costs, high prices, and improper usage, they hope to upend healthcare and to be able to make their innovations freely available to other companies.

In terms of marketing for healthcare, patients are looking for clear information around their coverage, available services, and what they are being charged for. This is where the distrustful consumer arises, and the element of trust comes back into play.

73% of consumers today consider transparency more important than price, with 40% saying they would switch from their preferred brand to one that offered more transparency[9].

Education through content will help patients make more informed choices, set proper expectations for their interactions with brands, and build a solid foundation of trust to grow future engagements. Transparent communications and experiences will leave patients feeling more in control of their healthcare and build organizations' brand equity with them. Marketing's role is to be empathetic to what patients care about most and help them make informed choices.

73% of consumers today consider transparency more important than price, with 40% saying they would switch from their preferred brand to one that offered more transparency[9].

04

Patients Are Becoming More Open to Alternative Settings for Care

For many patients, the doctor's office and hospitals are scary places. Couple that with the consumer trend for on-demand everything and rising costs of care, a shifting preference for care settings that break the norm commences.

Over the last several years, there has been significant rise in ambulatory surgical centers and outpatient treatments with patients becoming more comfortable receiving care in non-hospital settings, while also seeing better outcomes. According to McKinsey, usage of retail clinics has increased almost 3x since 2013, to almost a quarter of all patients having been to a retail clinic[7]. Telemedicine has been around for a bit now, with more insurance companies offering it as an affordable alternative to the office visit, making adoption by patients easier. Then, there are startups like Parsley Health, who are completely changing what a doctor's office will look and feel like, integrating the healing principles of biophilia to make the patient's experience seem more like an upscale spa than visiting a doctor's office.

The changing preference for care settings means marketers are going to have to better understand the needs of their patients' bases and connect them with the care settings that work for them. Tools like YEXT empower healthcare marketers to take better control of their hyper-local presence in search engines and online listings, keeping information accurate, up-to-date, visible, and automated. Online experiences, interactive content, and visual storytelling will help patients better assess what care options are right for them.

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04 Patients Are Becoming More Open to Alternative Settings for Care

05

# AI Assisting in Self-Serve Information Access and Support
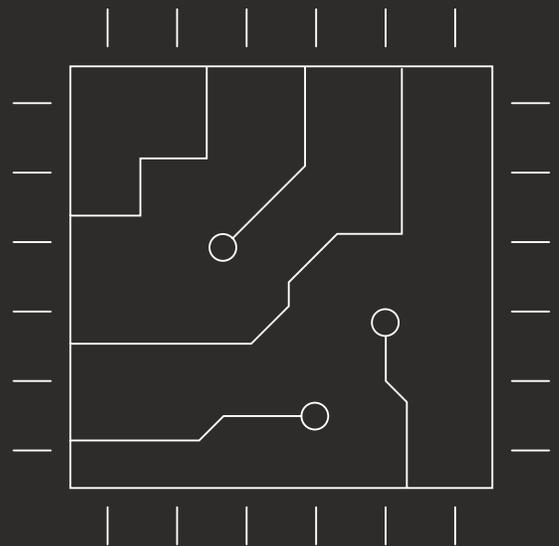
Even in the consumer space, Artificial Intelligence (AI) has yet to see true widespread adoption, but this is one area where healthcare organizations and startups are keeping pace with the consumer market. Many consumer markets are focused on leveraging AI for transactional purposes and enabling self-service. This enablement of self-service in medicine is manifesting in multiple ways, especially around educating patients, changing behaviors, and making transactional actions easier.

Planned Parenthood is empowering and educating teens through its brand new chatbot, Roo. The intent is to give well-sourced, accurate, judgment-free answers delivered in an anonymous way that teens are already using. The topics cover a wide range to help teens be more informed about their own sexual health, and if Roo can't answer a question, it will connect them with live educators in their Chat/Text program.

On the behavioral health side, there has been a rise in apps that support cognitive behavioral therapy such as [Woebot](#) and [Wysa](#). These apps help curb negative behaviors and thought patterns in an effort to better manage a user's mental health. Apps such as these are a natural next step for many heavily used mood track or digital diary apps.

On the self-service side, voice search is top of mind for many marketers. Google creating integrations with prominent appointment or schedule-based services, such as hairstylists and yoga classes, paints a picture that healthcare marketers should start thinking about now. Making health appointments via assistants such as Alexa, Siri, and Google Assistant is on the horizon. As the hardware for these assistants evolve, bringing in screens and expanding interactions, healthcare marketers need to prepare today for what will happen tomorrow.
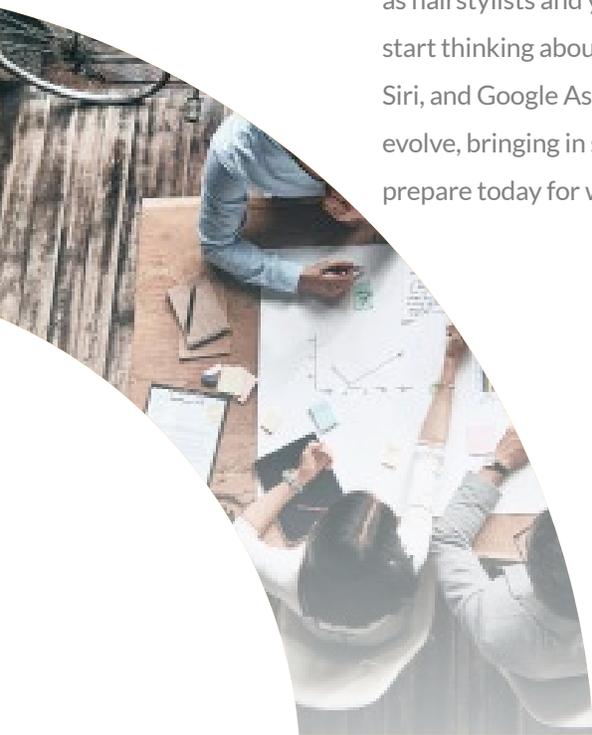
06

# Integration of Telehealth and Wearables to Build Trust with Healthcare Patients & Providers

Telehealth is starting to pick up speed as a result of insurance providers expanding coverage and startups, such as Talkspace, making telehealth seem more accessible for consumers. The future of telehealth lies in the integration with wearables. Wearables and integration with mobile devices provide clinicians the opportunity to supply some of the diagnostic information doctors typically collect at the start of an exam and allow patients to be monitored remotely, yet still encourage one-on-one provider-patient connections.

Apple has made heavy investments in their ResearchKit and CareKit SDKs, with CEO Tim Cook in a January interview stating that he wanted Apple's greatest contribution to humankind to be health. This goal is starting to be realized in several ways. Health insurer Aetna has created an app, Attain, that will incentivize health habits like physical exercise and getting enough sleep, allowing users to earn the watch over 24 months. The app will recommend personalized healthy actions based on a user's Aetna health history and sensor data from the watch itself. Patients want to know healthcare organizations are putting their best interests first and empowering them to make their own healthcare decisions.

The Apple platform is also being utilized by leading research institutions like Duke University and Johns Hopkins University. The Autism & Beyond app developed by Duke and University of Cape Town uses facial recognition algorithms to analyze the emotional reactions of children in videos, allowing for earlier diagnosis and treatment. While the previous nine-month on-site study struggled to boost enrollments, introduction of the innovative new app successfully enrolls significantly more individuals in the first month alone. Hopkins is using their EpiWatch app to help sufferers track the onset and duration of seizures in real-time, creating a picture of the correlation between episodes and medication for researchers, while alerting a designated family member or caregiver the seizure is occurring.

The biggest challenges will be interoperability and making existing or legacy data "AI ready," which has plagued the healthcare industry for over a decade. Despite the failed Google Health in 2011, it may have just been ahead of its time. Apple is now working with EHR vendors like Cerner and Epic to help solve these interoperability problems with the potential for huge impacts on collecting health data. Another AI challenge is that most health institutions are sitting on mounds of data, especially since the wider spread adoption of EHRs. But that data wasn't collected with the idea that machines had to interpret it, it was meant to share with other humans to interpret. To get that data AI ready will take a massive effort to tag and annotate imagery and records so that machines can be used to better identify potential conditions.
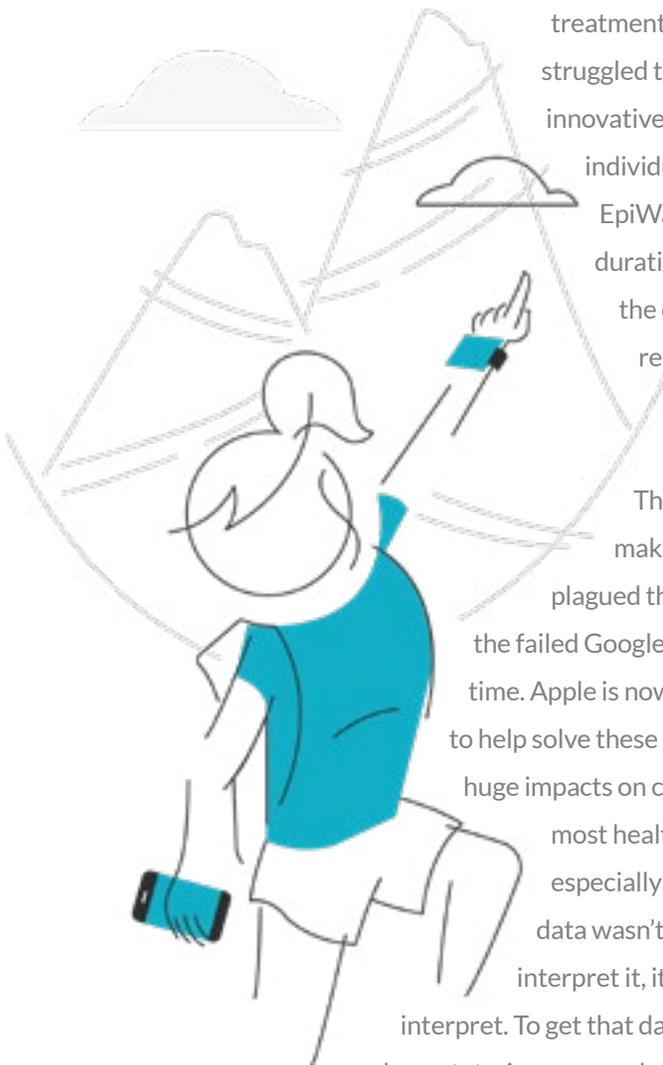
The convergence of data expansion, technology integrations, and value-based payments is revolutionizing the way that healthcare marketing is attracting and engaging patients. Data, combined with transparency, accountability, authenticity and trust is the new frontier for healthcare, and healthcare marketers need to be thinking about how to set themselves up for success. Technology is an investment made today that is with the future in mind. For healthcare marketers, that means finding ways that technology will empower healthcare marketers, clinicians, and patients.

The "Age of the Customer" has driven the healthcare industry to focus on the idea of "care" as a differentiator to attract and retain patients. The market has been saturated by the "care crowd" making the idea of caring ubiquitous within the industry, and thus without, meaningless to patients, providers, and organizations.

Feeling cared for is a reaction to an experience had. To drive action with key audiences, it is critical for healthcare organizations and their partners to look towards **building trust** with key audiences. Organizations must come to terms with the fact that consumers in a complex world of healthcare will not differentiate between them and their partners — thus placing further emphasis on trust-building experiences as an integral component to doing business. Without the element of trust, patients will be lost to someone else. Because of that, having the patient's trust becomes the next competitive advantage in healthcare.

> Data, combined with transparency, accountability, authenticity and trust is the new frontier for healthcare, and healthcare marketers need to be thinking about how to set themselves up for success.

Endnotes

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