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# A SPECIAL REPORT FOR HEALTHCARE MARKETERS:

*Success Awaits Those Whose Patient Care  
Includes Understanding the Cares of Patients*



# INTRODUCTION

## *MAKE IT MEAN SOMETHING—WHY?*

Why do some healthcare brands resonate with both consumers and employees, yet others fall short? Why do some healthcare brands struggle with messaging while others seem to simply live their messages, making the words they choose to communicate their brands connect with their audience like a physician with a superb bedside manner?

### **We decided to find out.**

Geile/Leon, a marketing communications firm with deep respect and understanding for what it takes to achieve meaning for consumers, wanted to know. So we conducted an original research study among consumers to find out what was really important to them, along with an analysis of the messaging healthcare brands were sending out to consumers.

At Geile/Leon, everything we do for our clients starts with **WHY?** And once we know, we create messages that truly mean something important to consumers.



# OVERVIEW

**A recent research study conducted by McKinsey & Company revealed there is a surprising gap between the content of advertising messages hospital vendors offer to hospitals, and what hospitals actually want to know from their vendors<sup>1</sup>.**

At Geile/Leon, we set out to learn if the same is true of hospital advertising messages directed to consumers.

**Is there a gap between the core messages hospitals communicate about their brands and the characteristics consumers value as important?**

And if so, why is there a disconnect, and what should be done about that? Will closing the gap improve the effectiveness and efficiency of healthcare marketing? Will healthcare brands attract more patients if they put customer cares ahead of their own?

This white paper examines the differences and similarities between what healthcare marketers communicate in their marketing messages and what consumers say is important to them. It also explores the ways successful healthcare marketers develop their communications and messaging strategies.

## OPPORTUNITIES FOR HEALTHCARE MARKETERS

In preparing this white paper, Geile/Leon conducted extensive research with consumers and healthcare marketers to uncover how aligned healthcare messages are with consumer demand for healthcare information.

The goal of this white paper is to highlight potential opportunities for healthcare marketers to more effectively develop content strategies that will lead to improved brand image and ultimately, contribute to increased market share and significantly higher ROI.



## HEALTHCARE AD SPEND EXCEEDS ALL OTHER INDUSTRIES

Given that healthcare ad spending ranks higher than any other industry, and U.S. consumers spend more than \$2.6 trillion each year on healthcare services<sup>2</sup>, it is important to examine the efficacy of healthcare advertising messaging.

Hospitals with more than 400 beds spend in excess of \$2 million on advertising annually, surveys have found.

## DIGITAL AD SPEND IS EXPLODING IN THE HEALTHCARE INDUSTRY

Advertising spending on paid digital media by the U.S. healthcare and pharmaceutical industry hit \$1.18 billion in 2013 and is expected to rise to \$1.47 billion by 2017<sup>4</sup>. (See graph to the bottom right.)

### What are Hospitals Saying in All of this Advertising?

Geile/Leon researchers analyzed advertising from hospitals coast-to-coast, large and small, pediatric and adult acute care, nonprofit and for profit to identify key themes.

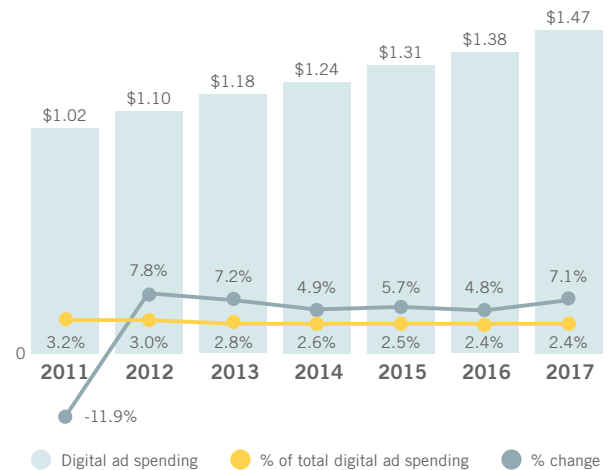
Healthcare Ad Spending Continues to Rank Above Other Industries <sup>3</sup>

#### Ad Spending Share Worldwide for Select Industries, 2011

% of Total	
Healthcare	10.2%
Cosmetics & Toiletries	9.2%
Automotive	8.1%
Media & Publishing	7.5%
Food	7.4%
Entertainment	6.1%
Drink	5.5%
Financial	5.3%
Distribution Channels	5.3%
Telecom	5.1%
Institutions	4.8%
Industry, Agriculture, & Property	3.6%
Clothing & Accessories	3.5%
Leisure Products	3.0%
Furnishings & Decoration	2.7%
Housekeeping Products	2.5%
Transport & Tourism	2.5%
Business Services	2.4%
Information Technology	1.4%
Domestic Appliances	1.2%
Power & Water	0.3%
Tobacco	0.1%

#### US Healthcare & Pharma Industry Digital Ad Spending, 2011-2017 <sup>4</sup>

billions, % of total digital ad spending and % change



Note: CAGR (2012-2017)=5.9%; includes advertising that appears on desktop and laptop computers as well as mobile phones and tablets, and includes all the various formats of advertising on those platforms; data through 2012 is derived from IAB/PwC data  
 Source: eMarketer, Aug 2013

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www.eMarketer.com



They came up with 11 recurring themes (*in alpha order*):

- Clinical expertise
- Community involvement
- Facility attributes — expansion/private rooms
- High/advanced technology
- Innovation
- Leadership
- Patient safety
- Rankings
- Research/clinical trials/teaching hospital
- Skilled, caring and friendly staff
- Successful outcomes/hope



While some hospitals employed multiple themes per campaign, most preferred to focus on one or two. Pediatric hospitals, understandably, added themes like being “child-centered” and “family-friendly.”

“Rankings” was another theme that occurred frequently across all hospitals in the study.

### ***Rankings Rank Low Among Consumers***

**#9**

Ranking given to importance of an adult hospital being “nationally ranked”

**#7**

Ranking given to importance of pediatric hospital being “nationally ranked”

## **RANKINGS**

Every year, *U.S. News and World Report* releases its “Best Hospitals” list, and the “honorees” begin touting their rankings immediately. Websites, outdoor banners, billboards, TV ads, social media and other forms of advertising gear up to announce the news to consumers.

“Nearly every hospital has a banner out front saying they’re a ‘top hospital’ for something in some rating system,” said Dr. Nicholas Osborne, a Robert Wood Johnson Clinical Scholar at the University of Michigan. “Those ratings have become more important for hospital marketing than for actually helping patients find the best care<sup>5</sup>.”

There are a number of different entities that rank hospitals, including Healthgrades, Consumer Reports, HealthInsight, The Leapfrog Group and even YELP, to name a few. But do consumers really care?

The top three hospitals, according to this year’s *U.S. News and World Report* rankings, include the Mayo Clinic, Massachusetts General Hospital and the Cleveland Clinic. But if you do not live anywhere near those hospitals, their rankings are not likely to influence your decision to seek medical care with them. Realistically, who flies to Mayo in Minnesota to get inhalers for asthma, even though it ranks No. 1 for pulmonary medicine<sup>5</sup>?

## WHAT DO CONSUMERS SAY IS IMPORTANT TO THEM?

If rankings are not at the top of consumers’ “want to know” list, what is? For adult acute care hospitals, consumers care about the staff more than they do the facilities in general.

### What Consumers Want to Know About Acute (Adult) Care Staff

Ranking	Attribute	Top Box <sup>6</sup>
# 1	Doctors and nurses are good communicators — with me and with each other	79.1%
# 2	Top physicians choose to work here	68.7%
# 3	The staff is efficient and there is enough staff to do the job	65.7%
# 4	They have top physicians with expertise/experience in a variety of specialties working there	64.7%
# 5	The staff is friendly, helpful and considerate (they care)	63.4%
# 6	They have a team of specialists who would care for me	61.2%
# 7	They offer me hope	46.6%

***“I want to know that they are personable and care about me! Personal care!”***

— Healthcare Consumer

***“It’s the quality and credentials of the physicians [that I care about].”***

— Healthcare Consumer

Consumers say they care more about the *people* who will be tending to their care than they do about the facility in general, but the overriding topic of importance, as revealed in the survey, is whether or not the hospital accepts their insurance. (See list on next page ranking the topics consumers feel are important.) No advertising that was part of this study mentions insurance acceptance even once, and it is the most important aspect consumers care about.

***“I want a healthcare facility to treat whatever ailment I have in an exceptional way that won’t bankrupt my family. That’s pretty much it.”***

— Healthcare Consumer



### What Consumers Say is Important About Acute Care (Adult) Facilities

Ranking	Attribute	Top Two Boxes <sup>7</sup>
# 1	My insurance is accepted there	96.3%
# 2	They specialize in what I have	93.6%
# 3	They deliver amazing results	90.3%
# 4	Patient safety is a priority	90.2%
# 5	They use the newest treatments and technologies/ breakthrough medicine	89.5%
# 6	My primary care doctor/specialist recommended it	85.8%
# 7	People with my issues have been treated there and had exceptional outcomes (Testimonials)	85.7%
# 8	ER wait times are short	81%
# 9	It is nationally ranked	65.7%
# 10	They have all private rooms/suites so family can stay the night	54.6%
# 11	They are in a network of hospitals/locations	54.5%
# 12	They care for our community	49.2%
# 13	They have enlarged/expanded facilities	37.3%
# 14	It is a teaching/research facility	35.8%
# 15	They do organ transplants	29.3%
# 16	They have been in our community a long time (over 50 years)	23.9%

## WHAT DO PARENTS SAY IS IMPORTANT?

Kids are not just little adults; their healthcare needs aren't miniature versions of what adults need. Parents say that doctors and nurses who are good communicators are especially important to them. Surprisingly, this isn't a topic that is addressed in most pediatric advertising.

## GIVE HOPE A CHANCE

Author **Doug Dobransky**  
*(Autumn Sister, a personal journal that chronicles the journey shared by a brother and his terminally ill sister)* says, **“Above all else, in my opinion, when people get sick, their automatic and immediate wish is to find hope and get well. To achieve that, they wish to find a facility with the highest expertise, geared toward what they have...cancer, cardiac, transplants, diabetic, etc. The level of care and courtesy are important also, but hope and the chance to get well is primary.”**



### Staff-Related Attributes Parents Care About

Ranking	Attribute	Top Box <sup>6</sup>
# 1	Doctors and nurses are good communicators — to my family and to each other	83.8%
# 2	Top pediatricians with experience in a variety of specialties work there	73%
# 3	The staff is friendly, helpful and considerate	67.6%
# 4	The staff and facility are child-oriented	67.6%
# 5	The staff is compassionate and respectful of our family	67.6%
# 6	The staff is efficient and there is enough staff to do the job	64.9%

*“I want to be guaranteed that my child will be seen by a physician.”*

*This is very important.”*  
— Parent

Consistent with opinions about adult acute-care hospitals, parents rank staff-related attributes as more important than facility-related attributes. Still, they look for specific attributes when selecting a pediatric facility.

### Facility-Related Attributes Parents Care About

Ranking	Attribute	Top Box <sup>6</sup>
# 1	The facility is modern, clean and well cared for	64.9%
# 2	They use the newest treatments and technologies	62.2%
# 3	ER wait times are short	51.4%
# 4	They have all private rooms, and parents can stay the night	48.6%
# 5	Children like yours have been treated there and had exceptional outcomes (Testimonials)	45.9%
# 6	Our pediatrician recommended it	35.1%
# 7	It is nationally ranked	21.6%
# 8	The facility provides uncompensated care for families who need it	13.5%
#9	It is a teaching/research facility	2.9%

*“Clean is definitely a factor.”*

*Modern?*

*I don't care if the counters are granite or not.”*  
— Parent



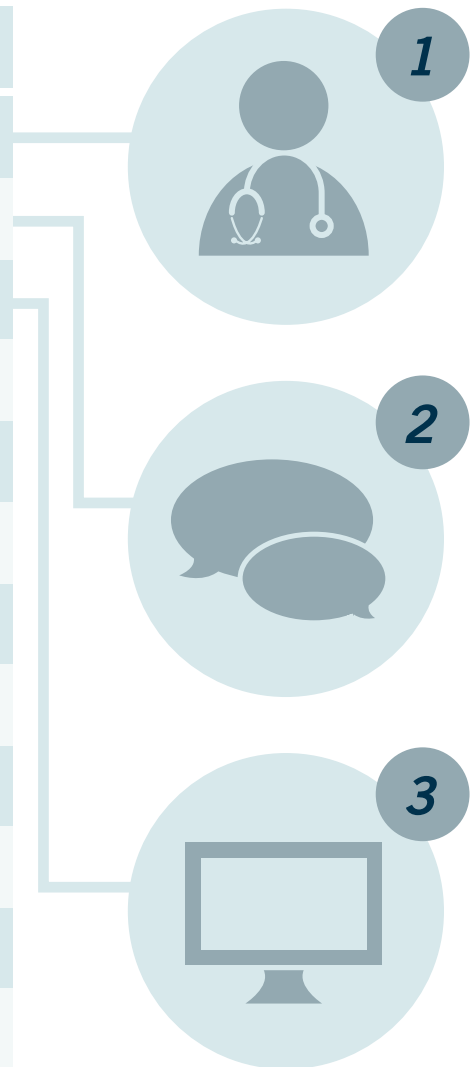
## HOW DO CONSUMERS LEARN ABOUT HEALTHCARE PROVIDERS?

With ad spend by healthcare providers at an all-time high, what delivers the most “bang for the buck?” Unsurprisingly, it’s not a paid medium (in the strict sense of the word) at all. It is the primary care physician, followed by word of mouth.

Here are the top 12 ways consumers learn about healthcare providers:

### Consumer influence

Ranking	Source	Top Two Boxes <sup>7</sup>
# 1	Primary care physician	86.1%
# 2	Friends and relatives (word of mouth)	85.4%
# 3	Healthcare provider websites	58.5%
# 4	News stories about healthcare provider	54.3%
# 5	Television ads	24%
# 6	Healthcare provider newsletters	19.4%
# 7	Social media	18.9%
# 8	Healthcare provider direct mail	13.8%
# 9	Healthcare provider events	13.8%
# 10	Radio ads	11.5%
# 11	Newspaper ads	7%
# 12	Magazine ads	4.6%



***“Recommendations and (news) stories lead me to research products and services I may be interested in.”*** — Healthcare Consumer

**Specialties of Interest**

<i>Ranking</i>	<i>Specialty</i>	<i>Top Two Boxes<sup>7</sup></i>
# 1	Cardiology	59.7%
# 2	Cancer	59.4%
# 3	Diabetes & Endocrinology	45.8%
# 4	Orthopedics	41.9%
# 5	Rehabilitation	36.4%
# 6	Ear, Nose & Throat	35.6%
# 7	Gastroenterology/GL Surgery	33.6%
# 8	Gynecological Oncology	32.1%
# 9	Pulmonary	31.1%
# 10	Urology	28.1%
# 11	Vascular Care	28%
# 12	Behavioral Medicine	27.2%
# 13	Sports Medicine	25.8%
# 14	Neurosurgery	25%
#15	Geriatrics	24.1%
#16	Organ Transplantation	21%
# 17	Rheumatology	20.4%
# 18	Thoracic Surgery	14%
# 19	Carpal Tunnel Syndrome	12.5%
# 20	Nephrology	7.9%

**HEALTHCARE SPECIALTIES OF INTEREST**

While most healthcare marketers correctly focus their messaging on specialties for which they have expertise, some specialties have more consumer interest than others.

**HOW HEALTHCARE PROVIDERS DETERMINE BRAND MESSAGING STRATEGY: THREE EXAMPLES**

Until the early ‘80s, hospital advertising wasn’t allowed in the U.S., by law. It was the 1982 Supreme Court decision, upholding the FTC petition that triggered the start of a new era of advertising—hospital advertising<sup>8</sup>. Today, of course, healthcare ad spend ranks as number one across all industries.

**How does this young category decide on marketing messages? How does it develop strong brand identity?**

SSM Cardinal Glennon Children’s Medical Center, St. Mary’s Hospital and Metro Imaging share how they market their brand messages.



## SSM Cardinal Glennon Children's Medical Center



At SSM Cardinal Glennon Children's Medical Center in St. Louis, Missouri, brand marketing is all about finding out what young parents want and need to know. Chief Executive Officer Sherlyn Hailstone says, "We use focus groups to understand what is important to target users, and we structure our messaging strategy

to provide the information that parents say is important. We validate that with quantitative research, then we focus group test it again to see if parents really understand it."

***"Knowing where moms spend their 'media' time is as important as knowing what to say to them when they are there."*** — Sherlyn Hailstone, CEO, SSM Cardinal Glennon Children's Medical Center

"We have learned what parents think is important: a clean, child-centered environment. We show docs and caregivers working together and communicating with patients and families; we talk about our surgeons and their expertise; we also keep the Glennon Sun (graphic logo) at the forefront of our advertising, because we 'own' the sun."

Hailstone also says her hospital is using more social media and email now than they did in the past, and they have recently implemented a CRM database system which tracks and measures responses from their key audience: new moms. "Knowing where moms spend their 'media' time is as important as knowing what to say to them when they are there," she says.

As a result of their keen understanding of consumer behavior and their communication of what parents see as important, SSM Cardinal Glennon Children's Medical Center has the highest advertising and tagline awareness in the marketplace, despite having a fraction of the marketing budget of its largest competitor.

## St. Mary's Hospital



St. Mary's Hospital is a 355-bed, all private room healthcare facility situated on a 21-acre campus overlooking Lake Decatur, Illinois. St. Mary's Chief Communications Officer, Molly Wilson tailors their brand messages and the media selection to specific audiences. "For example, 60+ year-olds tell us they like to receive direct mail," says Wilson, "but that won't work for the under-30 crowd."

She also uses focus groups to test the current messaging. “We base the revised, or even new messaging on what’s learned from the groups,” she says. “Then we measure our success through community perception studies which are done every two years.”

## Metro Imaging



Metro Imaging has five full-service imaging centers in the greater St. Louis area. Chief Executive Officer, Harley Hammerman, MD says, “The patients who come here for their examinations have always had a common concern: they all want to know, with more or less urgency, what their MRI, CT or mammography examination shows. They ask, ‘When will my doctor get my results?’ They beg our technologists to give them results and say that it can take weeks to get results from their referring physicians.”

***“We needed to offer something no one else did and something patients really cared about. That became our point of differentiation.”*** — Harley Hammerman, MD, CEO, Metro Imaging

“It wasn’t until our business flattened out and I read a most inspiring book, *Blue Ocean Strategy*<sup>9</sup>, that I realized we needed to create a ‘blue ocean’ of uncontested market space in order to succeed. We needed to offer something no one else did and something patients really cared about. That became our point of differentiation: OnSite Results (OSR). This was both risky and revolutionary. And also rewarding.”

For the first 12 months after the start of OSR, Metro Imaging’s total volume increased by 7.7 percent. Now, Metro Imaging is advertising something new that patients really care about.

### *Lower costs.*

“Today, as patients are experiencing higher deductibles of \$500, \$1000 and more, they became more interested in the cost of the imaging exam, so we decided to advertise our lower cost structure,” says Dr. Hammerman. “We augmented our ‘OnSite Results’ message with a ‘call and compare costs’ message. We simply listen to patients to learn what they really care about, and then we give them what they want.”

Dr. Hammerman believes there are only two reasons to advertise. One is branding. The other is to give patients something they really want, not just something they already expect.

## CLOSING THE GAP: SIX WAYS TO MAKE YOUR MESSAGE CONNECT AND STICK

### 1 RESEARCH

Listen and learn. Employ both qualitative and quantitative research to learn and confirm what patients (and potential patients) care about. Follow up with further research to test the execution of your messaging.

### 2 EMPLOYEE ENGAGEMENT

Include employees, physicians, even your facility's foundation in the discovery process, conducting focus groups to understand what patients and families care about at the point of service. Communicate your marketing messages with your staff prior to launching any new campaign, as they are the ones to deliver your brand promises.

### 3 BRAND DRIVEN STRATEGIC MARKETING

Differentiate your brand messaging and communicate your WHY, to stand out, to connect with patients and assure them that your organization cares about—and delivers—what they care about. Kevin Pho, a surgeon who authors the blog, *Skeptical Scalpel MD*, says, “Hospital CEOs admit that much of their advertising is aimed at stroking the egos of their doctors or boosting staff morale<sup>10</sup>,” not telling patients what they want to know.

### 4 COMPELLING CREATIVE

Creativity is what gives life to your strategic brand messages. It is what touches the heart (as well as the brain) of your target consumer, and it is what is remembered. It is your public face. Don't go out without it.

### 5 EARNED MEDIA: PUBLIC RELATIONS

While consumers are often wary of what they perceive to be “sales” messages, they respond positively to news stories. Earned media (PR) tends to lend more credibility than advertising because the “news media” is reporting the story.



Some believe no amount of advertising can provide the same credibility that media coverage inspires. New technology, groundbreaking procedures that are safer, faster healing time, less invasive, have higher percentage of cure/or alleviation of symptoms are great fodder for a media story. And if the leader in that technology can be trained to be a strong spokesperson then he or she will win over the media, and potential patients.

## **6** *SOCIAL MEDIA*

Patients appreciate good communicators and conversation, so it makes sense that they look for and welcome healthcare communications in the digital world. In fact, 41 percent of patients say social media affects hospital choice, while only 26 percent of all hospitals in the U.S. participate in social media<sup>11</sup>.

From a PR standpoint, social media enables instant communication in the event of negative press or breakthroughs in medicine. Hospital CEOs can connect on a personal level using social media, providing their insight and take on the current state of healthcare in general, and their hospital in particular.

# CONCLUSION

## *A WAKE-UP CALL FOR HEALTHCARE MARKETERS*

Both the McKinsey & Company report and the findings from the Geile/Leon study revealed that a lot of healthcare-related advertising is missing the mark.

In today's environment where healthcare providers are challenged to be more and more efficient and effective with every dollar they spend, healthcare marketers can't afford messages that miss the point consumers want to know. Those who focus their messages on what consumers care most about will be the most successful and the best stewards of the dollars entrusted to them.

Success requires focusing on the needs and wants of the patient/consumer/physician audiences. Too many healthcare advertisers are "me-centric," rather than "you-centric," believing that what they (or their docs or boards of directors) want to tout is what their target audiences want to know.

As the U.S. moves into an era where everyone has access to health insurance and makes individual choices, the healthcare providers whose patient care includes responding to the cares of their patients are the ones who will flourish even in the face of enormous industry change.



## Sources

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- <sup>3</sup> Nielsen. “Global Advview Pulse Lite, Q2011.” April 9, 2012 at [www.eMarketer.com](http://www.eMarketer.com).
- <sup>4</sup> eMarketer, Aug 2013.
- <sup>5</sup> Rosenthal, Elizabeth. “The Hype Over Hospital Rankings.” *The New York Times*, July 27, 2013.
- <sup>6</sup> Online Survey conducted by Geile/Leon, March 14-March 25, 2014 (Top Box refers to the topic consumers ranked as “Extremely Important”)
- <sup>7</sup> Online Survey conducted by Geile/Leon, March 14-March 25, 2014 (Top Two Boxes refers to the topic consumers ranked as either “Very Important” or “Extremely Important”)
- <sup>8</sup> Strach, Lauren. “Hospital Advertising in the Beginning: Marketplace Dynamics and the Lifting of the Ban.” The Economic Business & History Society.
- <sup>9</sup> Kim, W. Chan and Mauborgne, Renée. *Blue Ocean Strategy*. Harvard Business School Press, 2005.
- <sup>10</sup> Pho, Kevin. “Why doctors and hospitals shouldn’t advertise.” *Skeptical Scalpel MD*, February 6, 2013.
- <sup>11</sup> Ottenhoff, Mollie. “Infographic: 41 percent of patients say social media affect hospital choice.” Ragan Health Care Communication News, August 26, 2013.

## Methodology

1. Survey link was sent by email to approximately 2,500 consumers across the U.S. Respondents self-selected to participate and were offered no incentive
2. A total of 160 responses were collected between March 14 and March 25, 2014.
3. Results are statistically tested at confidence levels of 90% (+/- 6.48%) and 95% (+/- 7.72%).





## ABOUT GEILE/LEON

Geile/Leon believes that people want to do business with organizations that believe what they believe—organizations that care about what they care about and offer a promise they can believe in. Never has that been more critical than in today's healthcare marketing environment.

Geile/Leon has depth and breadth of expertise and experience in the healthcare industry, from the development and execution of marketing plans and advertising campaigns for hospitals, health systems, physician practices and industry vendors, to the creation of corporate and internal communications programs targeted to employees, physicians and the community at large.

Services to healthcare marketers include, but are not limited to, research studies, employee engagement programs, branding and strategic marketing plans, digital marketing, creative and production services and public relations.

**To learn more about why we do what we do, visit us at [geileon.com](http://geileon.com).**

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