

# AILING HEALTHCARE MARKETING?

A NEW ANALYTICAL APPROACH MAY BE THE CURE



It's a complicated landscape for healthcare marketers. From pediatrics to geriatric to end-of-life care, healthcare marketers are responsible for holistic strategies that target a vast audience with diverse and different needs.

Emerging research about the healthcare sector shows that the challenges healthcare companies face goes beyond channel strategies or healthcare branding – they're distilled into social attitudes about healthcare as an institution.

Healthcare providers may be challenged to identify appropriate strategies for increasingly digitally-connected seniors who, nonetheless, have traditional views about healthcare. But healthcare marketing must also address its emerging poor reputation among and distrust from younger audiences who, surveys show, tend to view healthcare institutions as for-profit rackets (The Harris Poll). But we know that as younger audiences grow and have families and children of their own, their outlooks about healthcare change focus (The Harris Poll).

### **That's a lot of changes and data to keep track of.**

To make matters worse, a dearth of research about healthcare audiences relies on outdated strategies to segment the audience. Namely, age/generation and demographics are largely used in market research to create inaccurate audience segments and ineffective personas. That incorrect data then cannot tell the whole story of the audience's relationship with their own health and healthcare throughout their lives.

Through research with these audience segments, our team of LEAP Panel researchers found the mindset of **healthcare life stages** provides a deeper dive into individuals' relationship with their own health and healthcare institutions.



# DEFINITIONS OF “HEALTH” AND “HEALTHY”

The very definition of “health” and “healthy” describe shifting states in a person’s health journey. Our health changes alongside our attitudes, values and needs. Behavioral and psychological analysis, rather than demographic or generational, form the best foundation for healthcare marketing.

Important life transitions, experiences and healthcare-related events often occur in the margins between clear generational groups.



## **GEN Z**

Comprised of both children and legal adults.



## **MILLENNIALS**

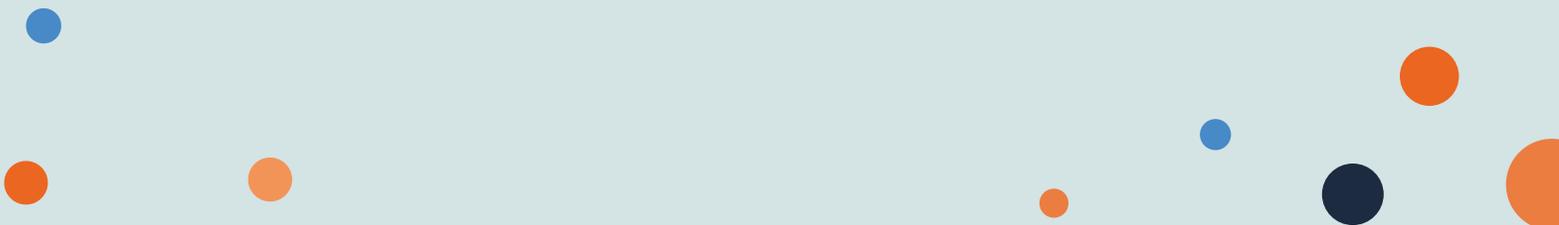
Both recent college grads with house plants and ardent, career breadwinners with children and mortgages.



## **BABY BOOMERS**

Quick with mobile and digital capabilities and are increasingly acclimating to telehealth.

Throughout life stages, the subtleties of belief and behavior surrounding health, healthcare seeking, and healthcare institutions are vital to uncover the optimal marketing touchpoints for this diverse audience.





## SUB-ADULT

During childhood (and the years leading up to legal adulthood) these young healthcare-consumers-to-be are forming attitudes and habits about health and healthcare. Parents play a significant role in helping the sub-adult population know **WHEN** to visit to the doctor and **WHAT** to do in the appointment.



### HEALTHCARE NEEDS

Above all else, these young adults need to learn how to independently navigate healthcare systems and their own care needs.



### INSURANCE NEEDS

They are still covered by their parent's insurance.



### HOW TO REACH

- Create educational content for parents to help prepare their children for their own major healthcare milestones.
- Offer age-appropriate educational content about health and staying healthy.
- Offer age-appropriate educational content about how to talk to doctors and address healthcare needs.



## TURNING 18

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### THE FIRST MAJOR TURNING POINT

Major life changes happen when you turn 18. You graduate high school. You go off to college. You might live alone for the first time. And you might have adult responsibilities for the first time.

At this life stage, young people are typically focused on learning how to live independently and make decisions that will influence their futures – and that includes settling into healthy (or unhealthy) behaviors.

We utilized our [LEAP Panel](#) focus groups to speak with young people about their healthcare attitudes and behaviors. Our focus groups surmised these young audiences tend to be generally healthy – they don't report being sick often. And when they are, it tends to be acute. But they do have health concerns. Young people experience a lot of stress related to work, school and their own personal lives.

Obesity, mental health and substance abuse are major concerns for this population, who are avid drivers of the health and wellness industry. Exercise, nutrition, healthy sleep habits and mindfulness are important lifestyle behaviors for this audience, and they often worry when they don't have the ability to make time for these activities.





## TURNING 18 (CONT'D)

### THE FIRST MAJOR TURNING POINT



#### HEALTHCARE NEEDS

This population doesn't tend to be active healthcare consumers, and they need a LOT of guidance. LEAP Panel research shows 18-25-year-old healthcare consumers are unsure of the first step they need to take to find an adult Primary Care Physician. A percentage of them still utilize pediatricians. Expected of this techy, young audience, they highly utilize simple searches to find doctors and, more often, self-diagnose symptoms to decide what level of care they need.



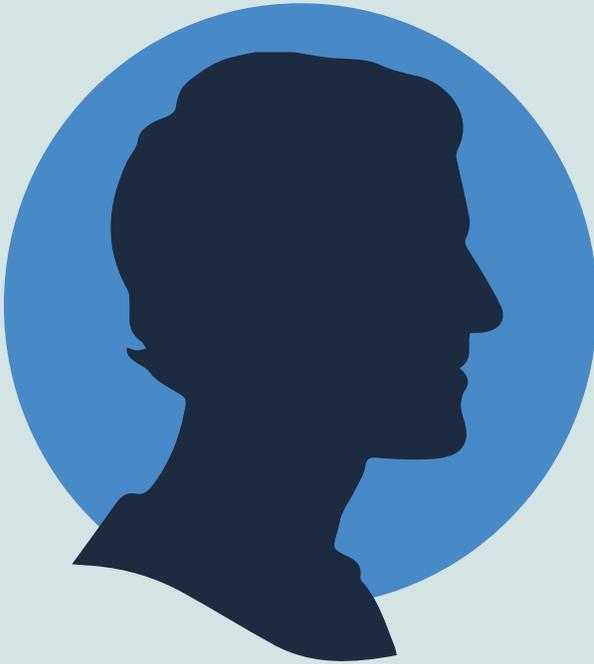
#### INSURANCE NEEDS

While these healthcare consumers are now legal adults and able to decide when to see a doctor, what to see a doctor for and who they want their primary care provider to be, many will still be covered under their parent's insurance and the doctors available to them will be limited to in-network options.



#### HOW TO REACH

- For this audience, we know a quick Google search is a stand-in for the doctor. Serve them landing pages that help them learn about symptoms, when to seek care and provide clear calls to action to direct them to the correct level of care facility.
- Likewise, create content tailored to FAQs and common informational needs that this audience requires in order to choose a PCP.
- Leverage reviews and an easy UX to compare providers, including filters, so that consumers can personalize their options.
- Drive awareness of telehealth and mobile/digital patient portals or apps. Give this audience as many easy pathways to seeking care as you can.



## TURNING 26

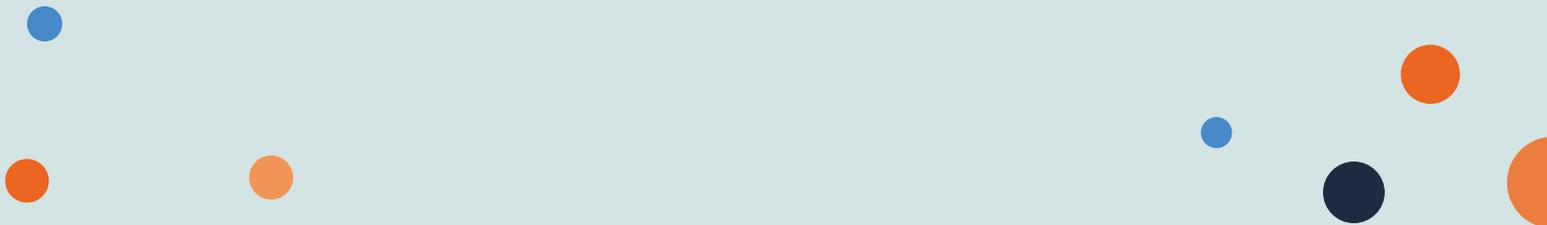
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UH-OH. WHAT NOW?

An outcome of the Affordable Care Act, children are able to stay on their parent's insurance until they turn 26. Healthcare consumers at this age might be able to receive insurance from a university, employer or out of pocket.

A lot can happen by age 26. For some consumers, this is the age they're entering their first careers or pursuing graduate/doctoral degrees. They might be married, have children or first homes. Others might be renting in an apartment with pets or plants. Whatever the case, these late twenty-somethings are experiencing true independence for the first time — including being newly afloat in the healthcare system and responsible for securing insurance and choosing doctors.

Research found by [LEAP Panel](#) showed a low utilization of PCPs among this age range. There are multiple reasons for this:





## TURNING 26 (CONT'D)

UH-OH. WHAT NOW?

1

People in the 26-35 age range tend to be healthy. Any health problems are likely to be emergencies or acute illnesses and injuries that heal on their own. As such, in-office checkups with a primary care provider is a rare occurrence. Retail clinics and urgent cares top utilization among this group. Interestingly enough, our research revealed routine use of dentists, mental health care providers, and other specialists. It's PCPs who get the cold shoulder.



Almost all of our panelists DID have a primary doctor but avoided seeing them unless absolutely necessary. And it makes sense when you think about it: PCPs seem to have little use if you're young and healthy.

Our panelists reported sour feelings about repeated experiences where they made visits to their primary care doctors for an illness – only to get better before they even went, or to be treated with OTC medication. Paying a copay and any additional fees for the price of a bottle of ibuprofen is not an experience that this cohort wants.



## TURNING 26 (CONT'D)

UH OH. WHAT NOW?



2

Modern healthcare systems are woefully unprepared to embrace the types of tradeoffs involved with making choices about health, as well as the reputation that this age range associates with the healthcare industry as a whole. LEAP Panelists described feeling neglected and rushed in doctors' offices, sharing a perception that their doctors were mainly interested in serving insurance companies, rather than their patients. When you already feel skeptical about the intention of a healthcare provider, then it's easy to make other choices. For this audience, they would prefer to suffer through an illness rather than pay a copay. Sucking it up to go to work sick rather than sacrifice a paycheck has a greater payoff for this audience than calling in sick to go to the doctor.

Much like the 18-year-old audience, at age 26, individuals are more likely to only seek care in acute or urgent situations. Web search and symptom checkers are popular when an ailment seems unusual or concerning.



## TURNING 26 (CONT'D)

UH OH. WHAT NOW?



### HEALTHCARE NEEDS

This age range WANTS a positive relationship with their doctor – and they need clear and convenient paths to achieve that relationship. For one, this audience needs access to transparent information about healthcare providers when they select a primary care physician.



Next, a positive experience in the doctor's office is important to fostering a sense of trust. When panelists described what that experience was, it was fairly simple: They want to feel like their doctor is actually listening to them. Often, our panelists found themselves frustrated by long wait times in waiting rooms, delayed appointment times, and brief interactions with the doctor. Leaving open lines of communication with telehealth and patient portals will also ensure this audience that their healthcare provider is truly concerned with offering them quality care.

Typically, at this life stage, individuals' needs are limited to the rare acute care, emergency care or preventative care (usually simple, such as getting a flu shot).

However, this audience demonstrates a higher attendance with health specialists: mental health professionals, dentists and gynecologists, for example. For some, their needs may expand into prenatal care. Overall, this audience has a vested interest in maintaining their health and their wallets.



## TURNING 26 (CONT'D)

UH OH. WHAT NOW?



### INSURANCE NEEDS

A study performed by Blue Cross Blue Shield indicates that, among today's cohort, there is a sharp downturn in health at age 27. There's no hard data to explain why this is the case, but our LEAP Panel hypothesis is that it might have something to do with the lack of insurance coverage that some members of this cohort experience when they turn 26. Without insurance, individuals tend to put off medical needs, even serious or concerning ones. Getting insurance coverage is the first and foremost concern for this audience.

Our panelists said that they often entered this stage of their life uneducated about insurance — most just hoped they could be covered through a job. Beyond that, panelists expressed confusion at how to most effectively choose a plan, how plans could be priced or how to compare insurance plans.

And forget the healthcare marketplace: among our panelists, almost none had experience picking an out-of-pocket plan. Education and preparation are key.



## TURNING 26 (CONT'D)

UH OH. WHAT NOW?



### HOW TO REACH

- Like their younger cohort, this audience segment relies heavily on search to look up symptoms or to compare potential PCPs – leverage a strong search strategy to funnel this audience to actionable landing pages and resources to help get them into the level of care required.
- Insurance is confusing! Help this audience understand their insurance plan – and provide them with provider directories that help them narrow down the type of PCP they want, with insurance as a filter.
- Get them involved in content creation. User-generated content is an effective mode of spreading health messages across social media. There's no better way to internalize a message than to create original content about it. There's no better way to reinforce healthcare behavior than by making it social and widely accepted.

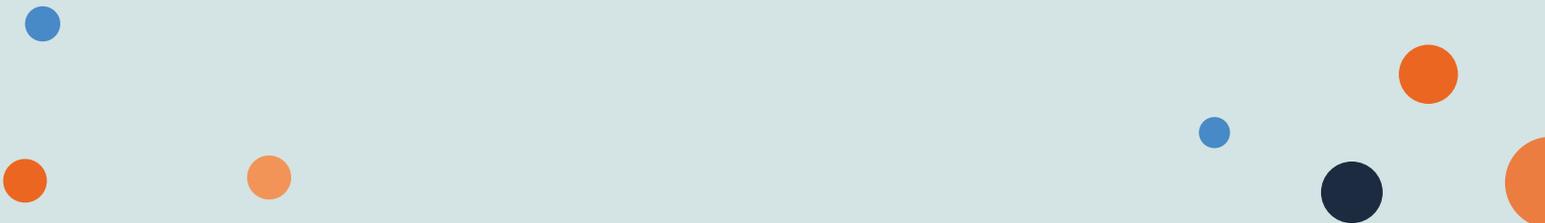


## LOOKING TO THE FUTURE

As consumers age into increasing personal autonomy and purchasing power, and settle into mortgages and building families, their perspective shifts toward the future.

According to a Harris Poll sponsored by TD Ameritrade, American adults in “Millennial” and “Boomer” generations feel optimistic about aging – with one caveat: They’re apprehensive about the impact potential health risks and healthcare-related costs could have on their future. Among personal concerns, declining health or health issues are ranked as even more concerning than the possibility of dying. Health maintenance and prevention are of top interest among this group.

For adults in this life stage, a LEAP Panel poll revealed the health of others takes priority over their own. The wellness of children and pets becomes the focus of consumers’ attention and can be the basis for motivation to attend to one’s own health.





## LOOKING TO THE FUTURE



### HEALTHCARE NEEDS

Prevention and maintenance offer great messaging points for this audience, as well as raising awareness about what types of regular testing they need to stay healthy as they grow older. Pediatrics becomes a focus for those in this audience with young families, as well as prenatal and family planning care.



### INSURANCE NEEDS

At this point, the audience is largely settled into their insurance routine – likely drawing insurance from an employer.



### HOW TO REACH

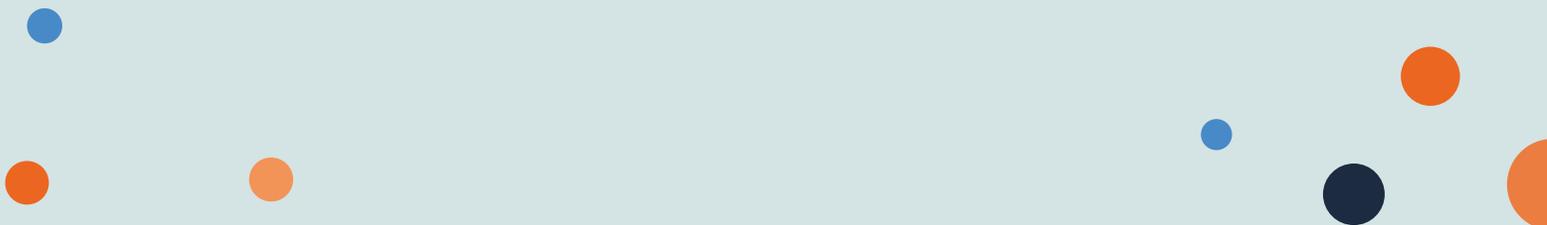
- Messaging can focus on reminding this audience segment to take care of themselves, too – this point in the consumers' life is a great opportunity to start dialing in healthy habits and prioritizing routine checkups. Push for a visit to the PCP as part of regular health maintenance.
- Leverage technology to help this audience stay in touch with their provider. Telehealth and digital/mobile communications can help streamline their patient experience.

## INDEPENDENTS... WITH DEPENDENTS



Healthcare gets even more complicated as adults age. They may have their own teenage or adult children and, increasingly, this audience takes over the care responsibilities for their aging parents. Like their younger selves, their own personal health may fall by the wayside as they prioritize care of others over their own.

However, they do have the knowledge of how to navigate healthcare systems, and they approach healthcare from a realistic and pragmatic viewpoint. With others relying on them, they are motivated to take their own long-term health seriously.





## INDEPENDENTS... WITH DEPENDENTS



### HEALTHCARE NEEDS

This audience doesn't have time to waste. The best way to serve them is with resources. Give them caregiving resources.

For individuals in this audience segment who are responsible for their parents' health, clear and actionable guides for caregiving can be a valuable lifeline. What they want the most from healthcare providers is transparency – this allows them to build communicative and trusting relationships with care providers.

Before you get their buy-in, you need to prove to them that you're worth it. Reviews and referrals can help give this audience reasons to believe, as can metrics that demonstrate positive outcomes for patients.



### INSURANCE NEEDS

Like most audience segments, this consumer is locked into their insurance, typically through an employer. For healthcare providers and networks, the best tool at your disposal to offer this consumer is straightforward information about types of insurance accepted in your office or clinic.



## INDEPENDENTS... WITH DEPENDENTS



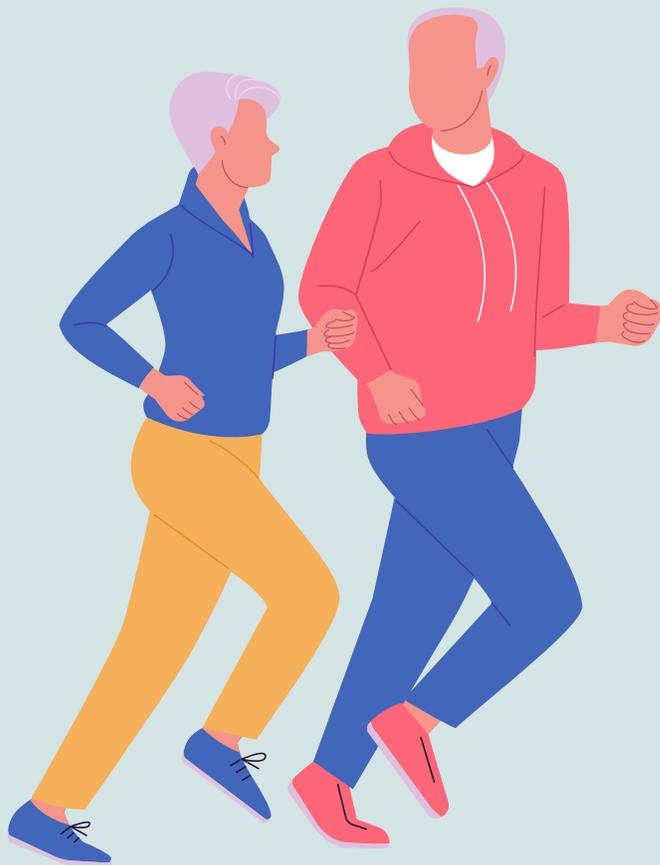
### HOW TO REACH

This audience is made up of both digital natives and digital migrants – a little bit of Google-fu is the first step for answers about everything from solutions to back pain to finding a home health nurse for a parent.

This audience values good information. Having a PPC strategy designed to funnel this audience to landing pages with information about frequent inquiries will make you useful and memorable. It doesn't hurt to develop a strong content library for resources.

In messaging, drive home efforts to enforce transparency. Leverage reviews, customer and practitioner testimony, and demonstrate metrics for real, effective outcomes.

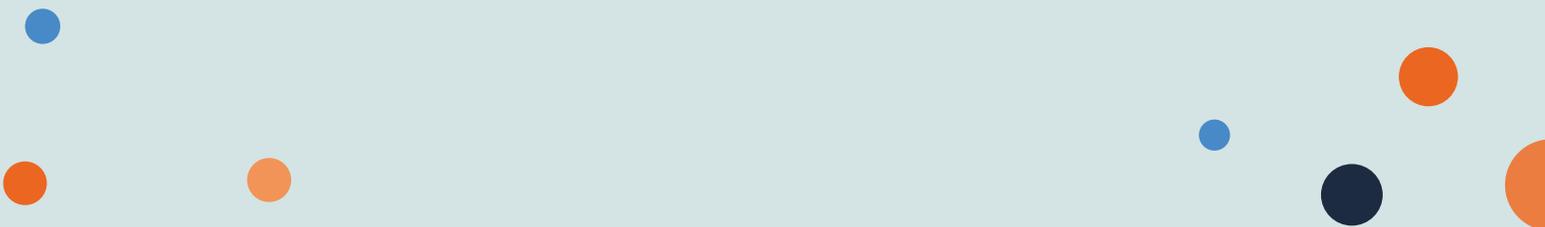
## AN EXPERIENCED VIEWPOINT



Most American adults have an optimistic view on aging, but only as long as they remain healthy. The incoming population of retirement-aged Americans is shaking off stereotypes about what it means to age. Senior audiences represent diverse lifestyles, interests, affinity groups, as well as health outlooks. A one size fits all marketing approach will drive away this audience.

In their personal lives, they may also be finally exploring new hobbies or new interests. Their children are grown and out of the house, but they may enjoy the company of grandchildren.

The best rule of thumb for the retiree healthcare population: Don't condescend and don't put them in a box. But do offer them helpful and practical advice.





## AN EXPERIENCED VIEWPOINT



### HEALTHCARE NEEDS

While senior healthcare consumers are more likely than younger audiences to be managing chronic or age-related health issues, a focus on preventative care and holistic health and wellness, including mental wellness, can carry high value to this audience.

On the whole, this audience desires a more traditional, formal relationship with their healthcare providers. Older healthcare consumers are acclimated to traditional office experiences and tend to accept the authority of healthcare providers, more so than younger consumers. However, this audience is also familiar with their own health – they need to be listened to and respected.



### INSURANCE NEEDS

Some of the senior audience will be shifting to Medicare coverage, which can put them back into the funnel of finding PCPs or specialists who are covered under their new insurance.



## AN EXPERIENCED VIEWPOINT



### HOW TO REACH

- Make sure you include a direct marketing strategy for this population. They will respond to cable television and radio ads.
- A retiree-specific marketing strategy in these channels can highly target this audience segment, while a more digitally connected younger audiences can be nurtured with digital and mobile strategies.
- Don't make the mistake of assuming retirees are disconnected from the online, mobile and the digital world – the U.S. population in this age range most often plays on Facebook, rather than other social media channels.
- Create content that reflects the varied and active lifestyles this population embodies.
- Avoid imagery that drives home any negative stereotypes or messaging around aging.
- Create landing pages and image content that are easy to understand and easy to use for retirement-aged adults that aren't literate with technology.
- Avoid content that condescends or insults individuals' intelligence. After all, by retirement age, these consumers know a thing or two about themselves and their health.



## **THE TAKEAWAY**

One similarity among all audience segments: At the end of the day, what consumers want is to not be marketed to.

They don't want a hard sell – or any type of sell, for that matter.

What they want are reputable healthcare providers that are able to give them useful information, to help them lead a happy, healthy life.

Marketing may not be the last stop for healthcare providers that are increasingly challenged to shift their operational focus to adapt to changing patient needs – but where the landscape is primed for revolution in patient-provider relationships, marketing can help play a role in disseminating vital health information and rebuilding the trust and reputability of the healthcare system.

