



**BY THE NUMBERS: MARCOM**  
**WHERE'S THE MONEY GOING?**

Endeavor



# OUTLINE / AGENDA

## THE STORM IS COMING

The Threat

Preparedness is Key

Living through the Storm

Q&A

## GET YOUR PACKS READY

A Better Understanding of the By the Numbers:  
MarCom Program Components

A Basis to Compare Your Marketing and  
Communications Resources and Allocation with  
Others

How to Use Benchmarking to Make Your Case for  
Resources



# WHY BENCHMARKING IS IMPORTANT

## BE HONEST ABOUT THE ENVIRONMENT

The pessimist complains about the wind; the optimist expects it to change; the realist adjusts the sails."

- William Arthur Ward

## FINANCIAL CHALLENGES

## DECLINE IN MARCOM BUDGETS

## WORKFORCE CHANGES

## MANAGING LEADERSHIP EXPECTATIONS





# YOUR PREPAREDNESS

Your purse string holders are just another **AUDIENCE**

Align with **BUSINESS GOALS**

Demonstrate **EFFICACY**

Share **COMPARABLE DATA**



# THE NEED

THINKING BIGGER THAN A "SURVEY"



## BLINDED

Create a datastore of marketing and communications resources



## COMPARABLE

Ensure benchmarks are true peers on a variety of dimensions



## MEANINGFUL

Asking the right questions of the right people



## ACCESSIBLE

Make data viewable, downloadable, and presentable for internal audiences



# WHAT'S BY THE NUMBERS: MARCOM

## METHODOLOGY

MarCom leaders from hospitals and health systems provide details on their budgets through our online survey and dashboard platform.

This data is shared anonymously to explore potential patterns for comparison.

For example:

- HOSPITAL TYPE
- INPATIENT BED SIZE
- ORGANIZATION TYPE

## PARTICIPATION LEVELS

Contributors

Report Purchasers

Subscribers



# THE HISTORY

BETTER TOGETHER

SHSMD's – 6 Editions between 2001-2020  
Endeavor's benchmarking for 2017 - 2021  
budget years

SHSMD and Endeavor partnered in 2021 to  
produce more comprehensive  
benchmarking

Refine the collection and reporting  
dashboard

Continue evolving the steering committee  
for guidance





# QUESTIONS ANSWERED BY THE NUMBERS

CHANGING THE WAY MARCOM LEADERS MAKE DECISIONS



WHAT ARE TYPICAL BUDGET AMOUNTS?



HOW ARE MARCOM BUDGETS DEPLOYED ACROSS THE MARKETING MIX?



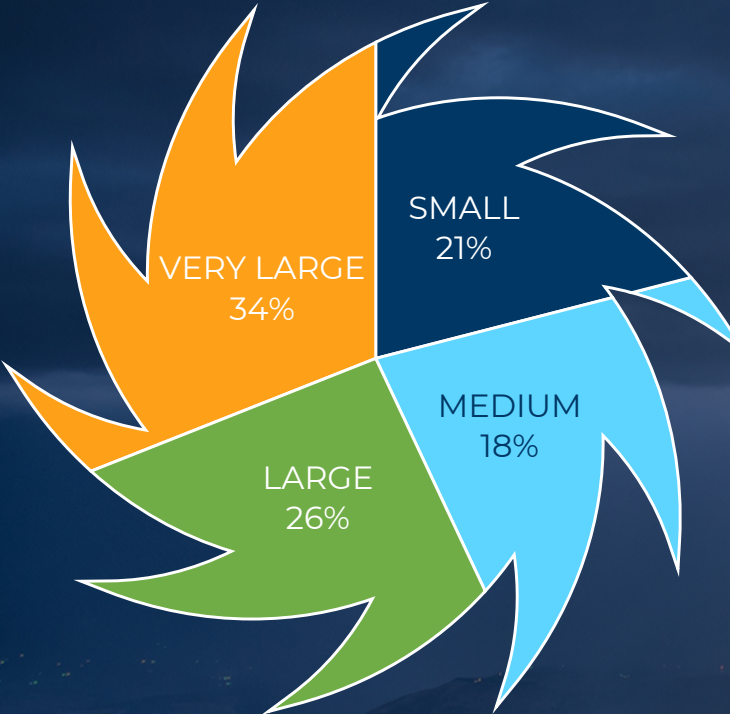
TO WHAT EXTENT ARE MARCOM STAFF BEING RESOURCED?



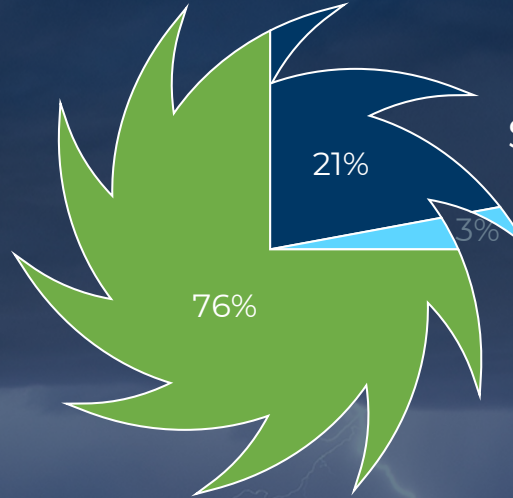
WHAT ARE OTHER ORGANIZATIONS FOCUSING ON?



# RESPONDENT PROFILES



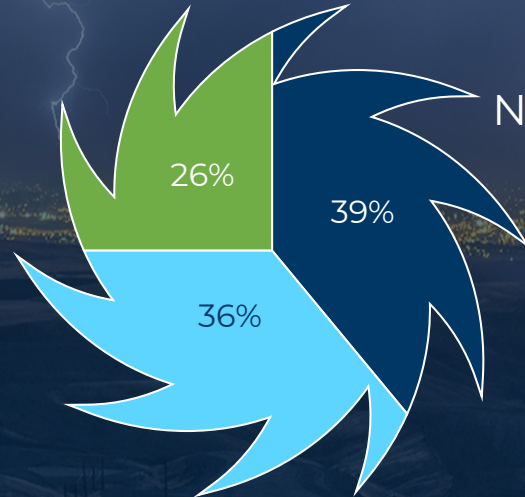
- ### BED SIZE
- SMALL: <255 BEDS
  - MEDIUM: 256-500 BEDS
  - LARGE: 501-1,500 BEDS
  - VERY LARGE: 1,500+ BEDS



- ### SYSTEM GEOGRAPHICAL SPAN
- GEOGRAPHICAL NARROW
  - REGIONAL
  - NATIONAL

### HOSPITAL TYPES

NOT FOR PROFIT	87%
ACADEMIC MEDICAL CENTER	39%
TEACHING HOSPITAL	28%
CHILDREN'S HOSPITAL	21%
CANCER CENTER	13%



- ### NUMBER OF HOSPITALS IN THE SYSTEM
- 1 HOSPITAL
  - 2-8 HOSPITALS
  - 9 OR MORE HOSPITALS

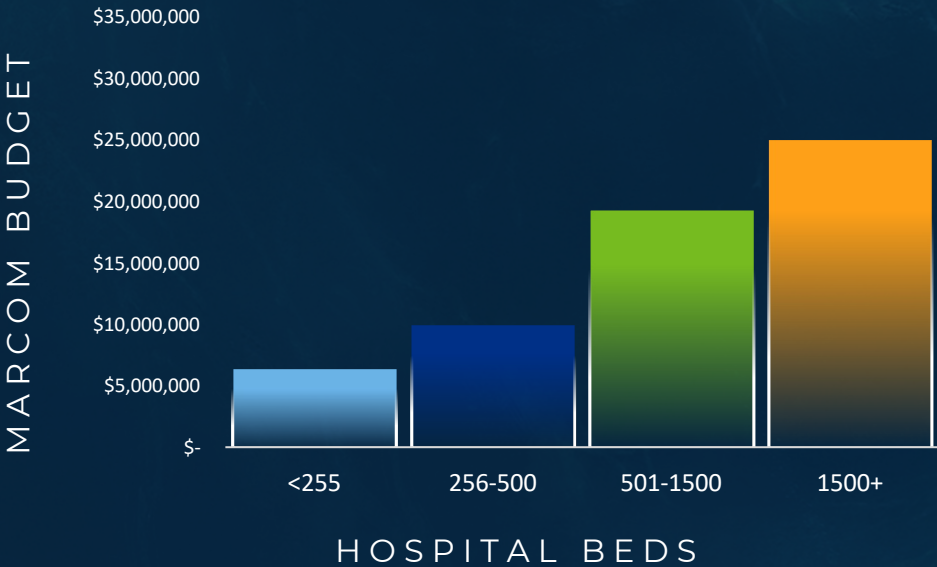
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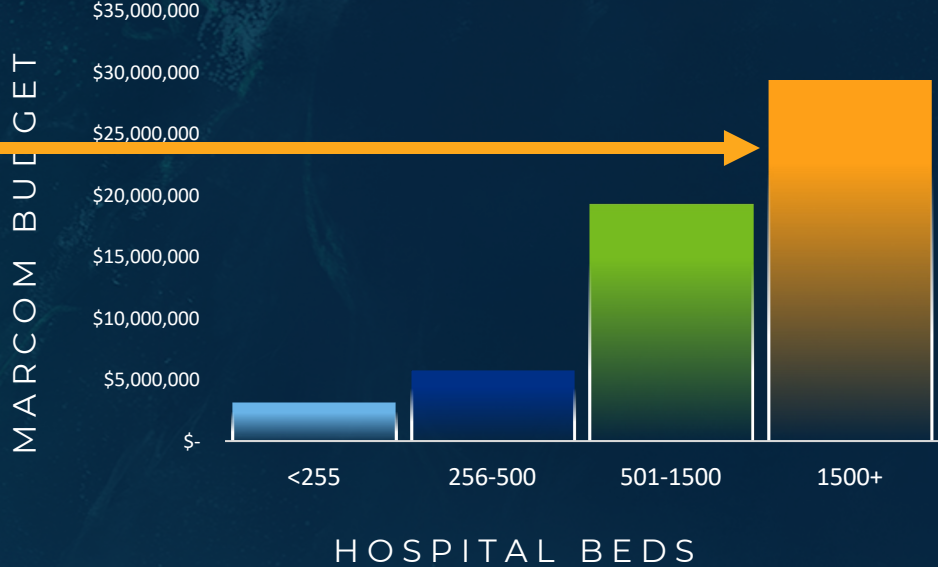
# OVERALL BUDGET

## BREAKDOWN BY SYSTEM SIZE

# 2020



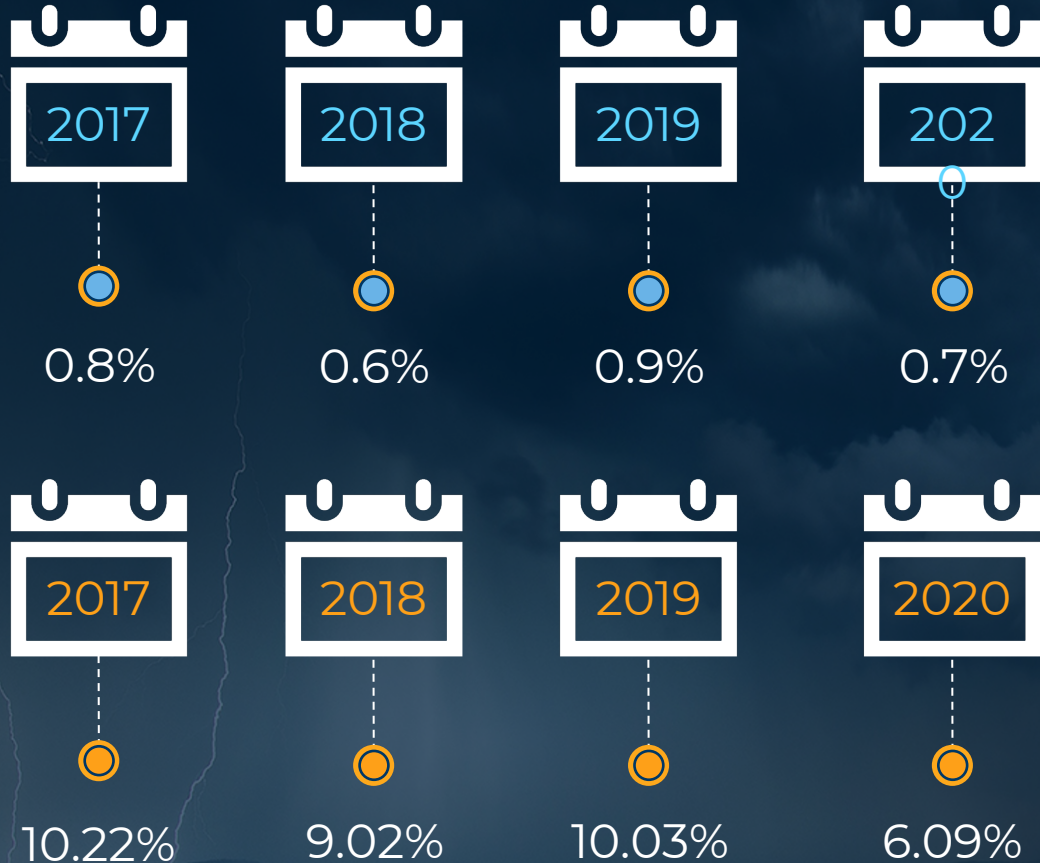
# 2021





# BY THE NUMBERS

## MARCOM BUDGET AS A PERCENTAGE OF REVENUE



2021 AVERAGE

0.7%

BROAD INDUSTRY AVERAGE:

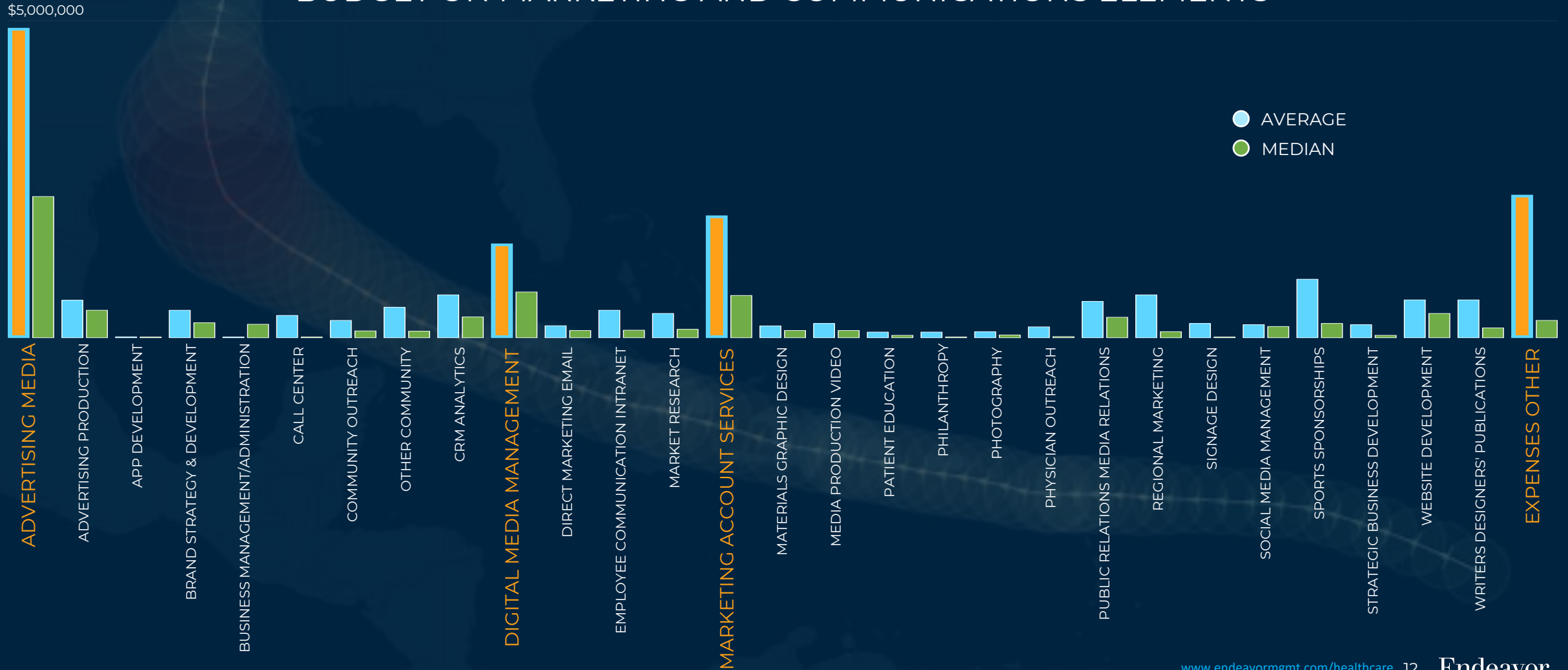
8.04%



# REPORTED EXPENSES ACROSS ACTIVITY

## MARKETING & COMMUNICATIONS MIX

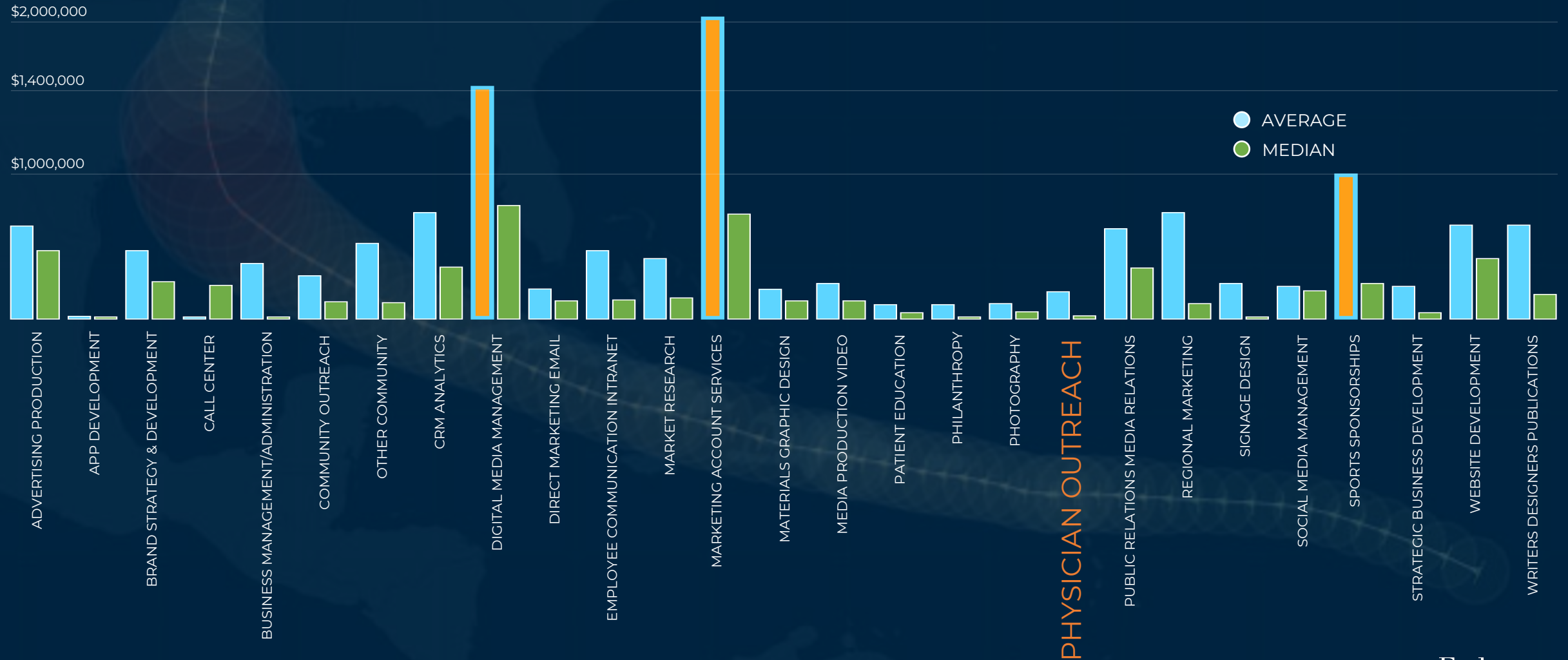
### BUDGET ON MARKETING AND COMMUNICATIONS ELEMENTS





# BUDGET ACROSS ACTIVITY

## MARKETING & COMMUNICATIONS MIX





# PHYSICIAN RELATIONSHIPS

INVEST WHERE IT MATTERS MOST

## MAKE THE CASE

Physician directed or influenced referrals continue to account for over half of patient volume - yet most marketing budgets are directed to consumers

## GET WITH THE TIMES

Younger physicians consume more social media and expect digital tools to be a seamless part of their experience – so their omnichannel experience must be well-designed and executed

## ADDRESS EMOTIONAL NEEDS

Information that helps physicians make referrals easily and to the best specialist for their patient continue to be a top priority (they don't want to simply "refer into the system") – so investments in outreach and updated, targeted collateral (ideally on demand) should focus on meeting these needs



# PROPORTION BUDGET

CHANGE IN DIGITAL MEDIA BUDGET THIS YEAR BY BED SIZE

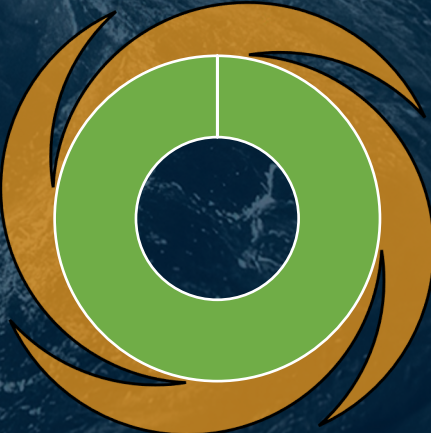
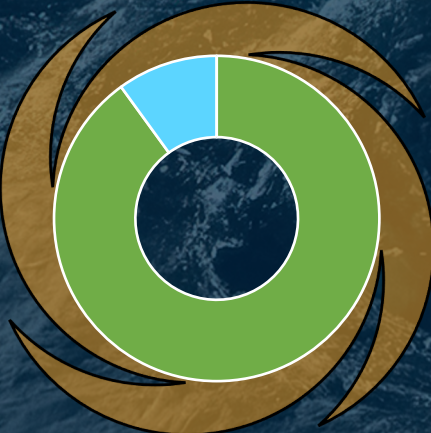
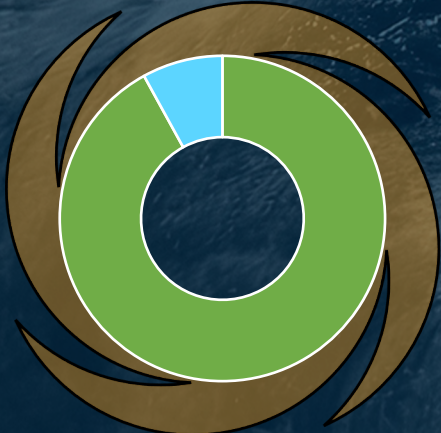
VERY LARGE: 1,500+ BEDS  
N=13

LARGE: 501-1,500 BEDS  
N=10

MEDIUM: 256-500 BEDS  
N=7

SMALL: <255 BEDS  
N=8

TOTAL SAMPLE  
N=38



● SAME    ● GREATER    ● LESS



# DIGITAL

MORE IMPORTANT THAN EVER

## INFLUENCE MATTERS

While influencers are a major component of digital marketing strategies, consumers view Nano & Micro influencers as “people like me” and are more likely to trust / take action from their recommendations and are more cost effective.

## VIDEO IS KEY

A key focus area for social media marketing is video content with longer attention capture compared to static posts. In addition, livestreaming is a powerful tool. Consumers spent around 548 billion hours streaming on mobile in 2021

## PUTTING COMMUNITY FIRST

Look to industries like gaming who are constantly innovating in their community management and marketing. Community is key and conversations can help identify future trends.

## ZERO/FIRST PARTY DATA

Integrate data collection methods which prioritize consumer privacy such as email, newsletters, social media and surveys. This enables creating more personalized and targeted campaigns.



# LIVING THROUGH THE STORM

Get Ready for the storm now

Monitor the projected path

Ensure you're well equipped

Be prepared to respond



The image features three flagpoles in a row on a paved terrace with a stone wall in the background. The sky is overcast with grey clouds. The first flag is blue and has the word 'OUTREACH' in white. The second flag is white and has the word 'MARKETING' in dark blue. The third flag is red and has the word 'OPERATIONS' in white.

**OUTREACH**

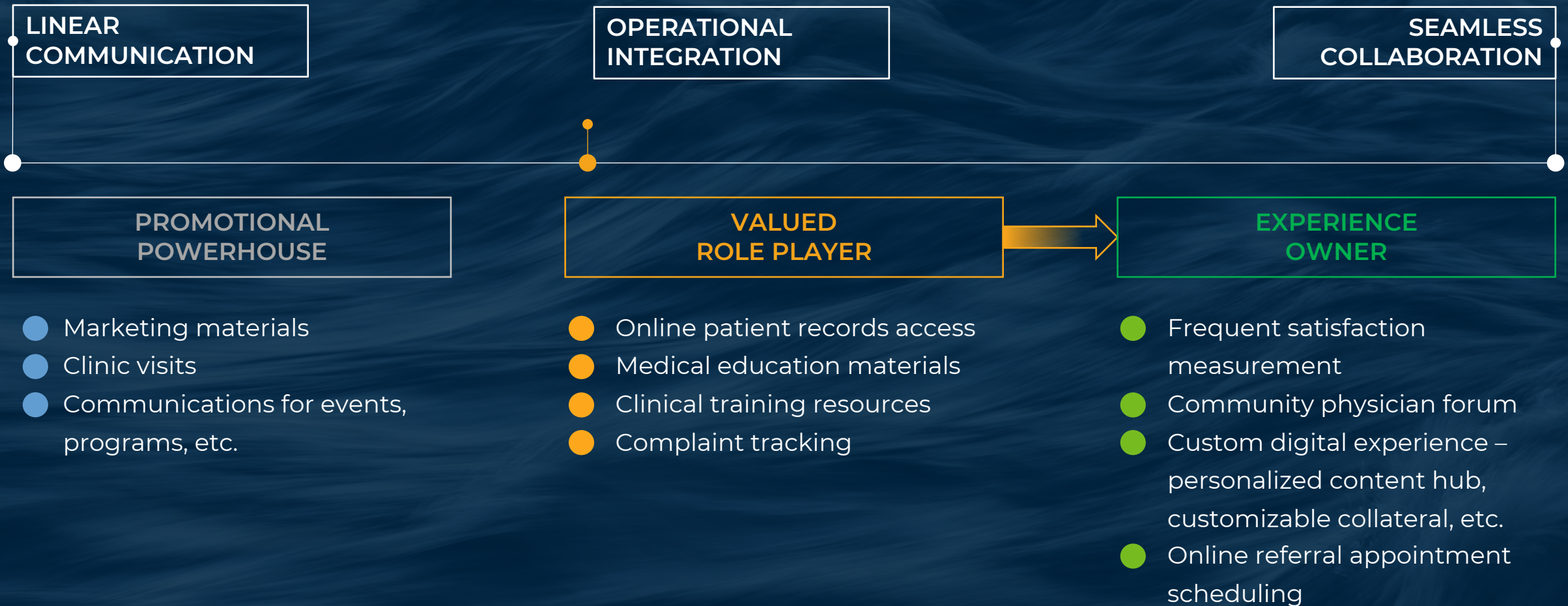
**MARKETING**

**OPERATIONS**



# CURRENT STATE MATURITY

## KNOWING THE PATH



Mature

Progressing

Needs Attention



# MULTIFACETED COMPONENTS FOR SUCCESS

## EVALUATING YOUR REFERRAL ECOSYSTEM







# GENERATE EXCITEMENT

BREAK AWAY FROM THE STATUS QUO

MENTAL HEALTH MATTERS



HEALTHY GAMER.GG



Establishing a direct line to the gaming community to talk about and offer help for the issues facing the community is on the rise.

Harvard Medical School educated psychiatrist and instructor Dr. K (Alok Kanojia) discusses issues like online harassment, depression and self-criticism with popular gaming guest stars.

Similar opportunities exist to connect gamers to cancer patients, use gaming to help patients through their cancer journeys, create donation platforms and attract new donor prospects from varied audiences.





# BY THE NUMBERS: MARCOM

POWERED BY ENDEAVOR ANALYTICS

The **ONLY** MarCom benchmarking program designed **BY** and **FOR** national health care leaders





# SPEAKER BIOGRAPHY



## JOHN MCKEEVER

Chief Growth Officer

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John has extensive experience working with healthcare organizations to achieve their goals for growth and business performance. He and his team have worked with many top ranked healthcare organizations to get and keep more customers – from consumers to referring physicians. John is recognized as one of the pioneers of experience management in healthcare, working in the area since the late 1990s. John received his MBA from the University of Houston and BBA from the University of New Mexico. He has been an adjunct professor of marketing at the University of Houston since 2002 and is a featured speaker and author on topics such as customer experience management, marketing strategy, marketing research and brand development.