



2022 SHSMD CONNECTIONS

September 11-14 Washington, D.C. area



Society for Health Care
Strategy & Market
Development™



BY THE NUMBERS: MARCOM WHERE IS THE MONEY GOING?

ALAN **SHOEBRIDGE** - Associate Vice President for National Communication, Providence

JOHN **MCKEEVER** - Chief Growth Officer, Endeavor Management



AHA Events

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**

SHSMD

Society for Health Care
Strategy & Market
Development™

THE HISTORY

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

SHSMD

Society for Health Care
Strategy & Market
Development™

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

SHSMD

Society for Health Care
Strategy & Market
Development™

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

SHSMD

Society for Health Care
Strategy & Market
Development™

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?

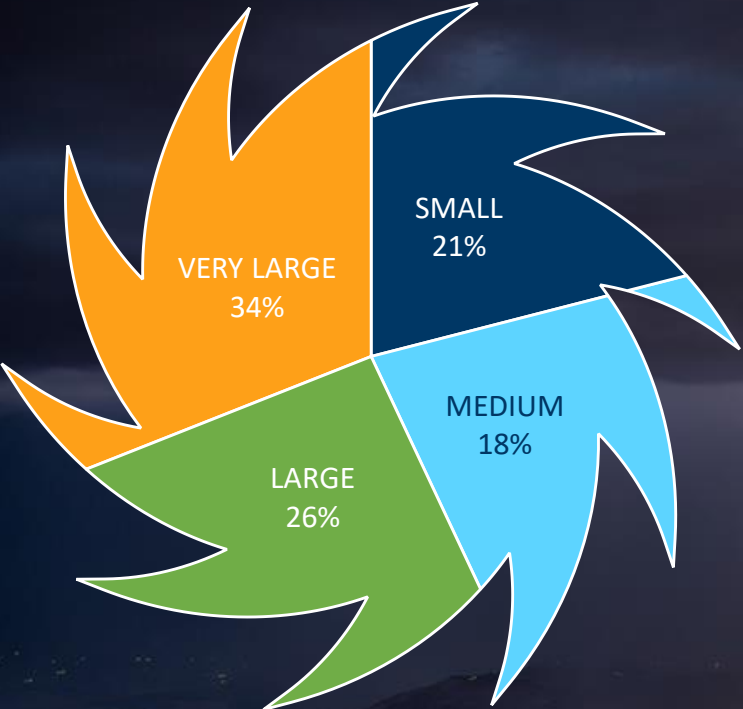


What are other organizations focusing on?

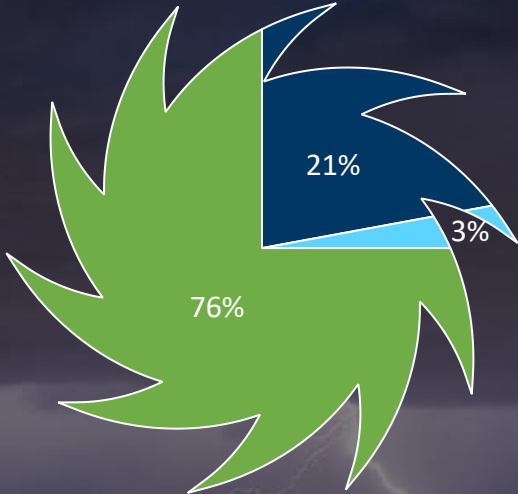
SHSMD

Society for Health Care
Strategy & Market
Development™

RESPONDENT PROFILES



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

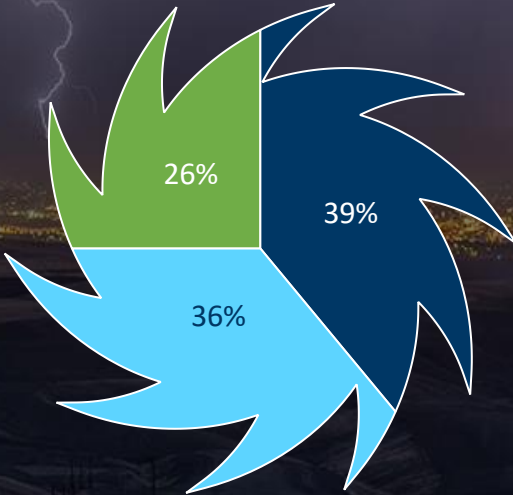


- SYSTEM GEOGRAPHICAL SPAN**
- GEOGRAPHICAL NARROW
 - REGIONAL
 - NATIONAL

HOSPITAL TYPES

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

N = 38



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

●●●●●

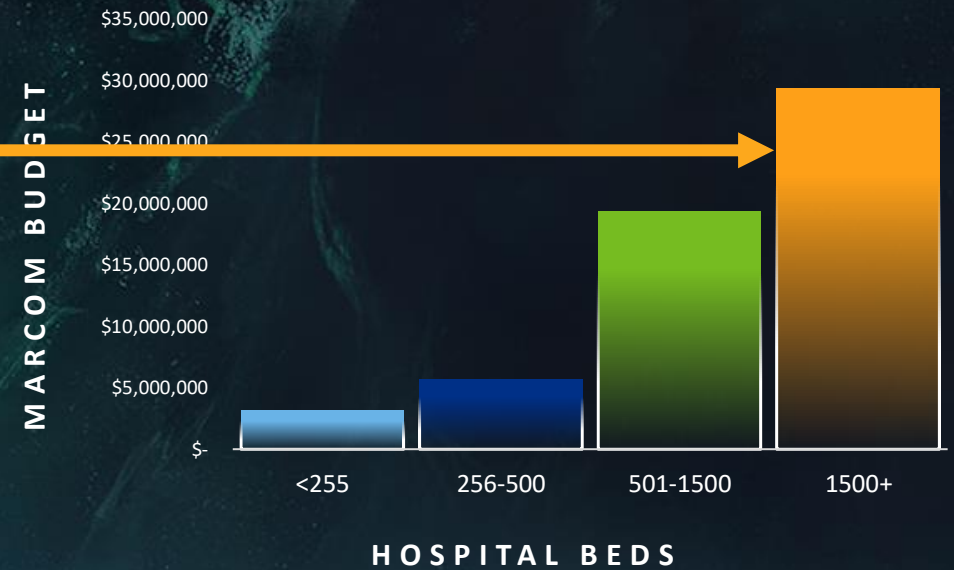
OVERALL BUDGET

BREAKDOWN BY SYSTEM SIZE

2020

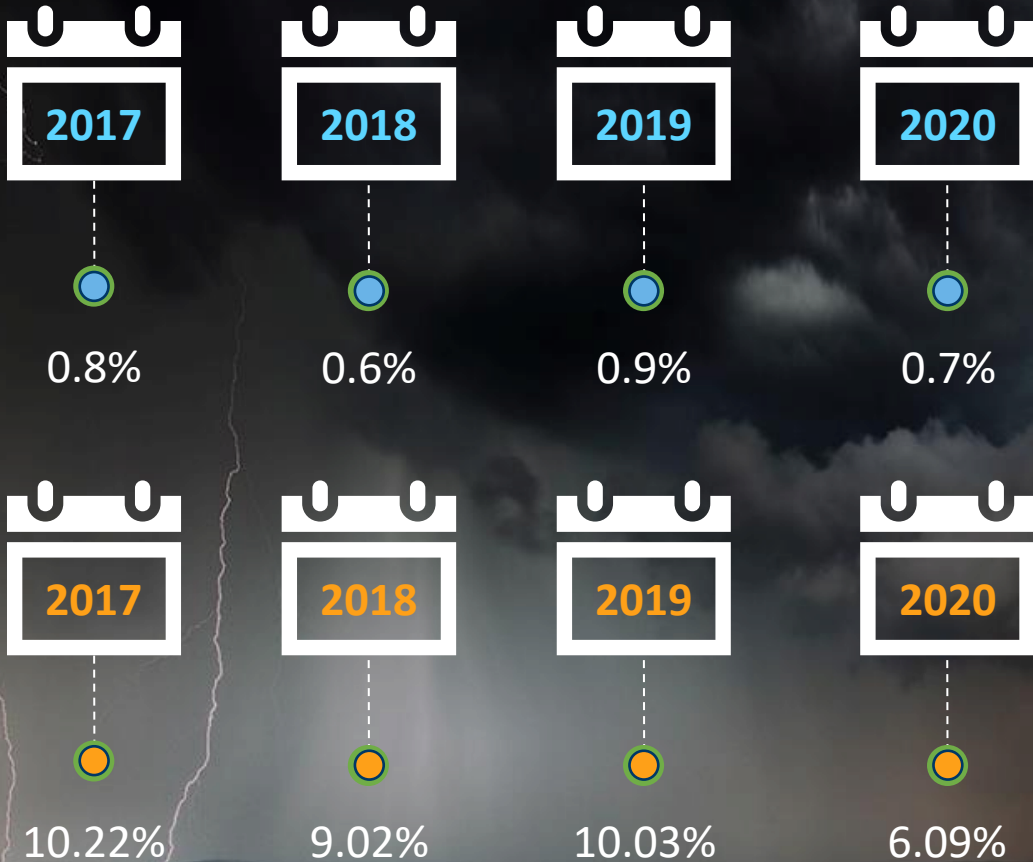


2021



BY THE NUMBERS

MARCOM BUDGET AS A PERCENTAGE OF REVENUE



2021 AVERAGE

0.7%

BROAD INDUSTRY AVERAGE:

8.04%

SHSMD

Society for Health Care
Strategy & Market
Development™

WHAT'S CHANGED?

2020

AVERAGES FOR ADVERTISING MEDIA

Percentage: 29.2%

TOTAL SPEND: \$6.1M

2021

AVERAGES FOR ADVERTISING MEDIA

Percentage: 28.3%

TOTAL SPEND: \$4.9M

AMONG THOSE WITH 2 YEARS' DATA

2020

Percentage: 27.1%

TOTAL SPEND: \$6.1M

2021

Percentage: 27.4%

TOTAL SPEND: \$8.4M

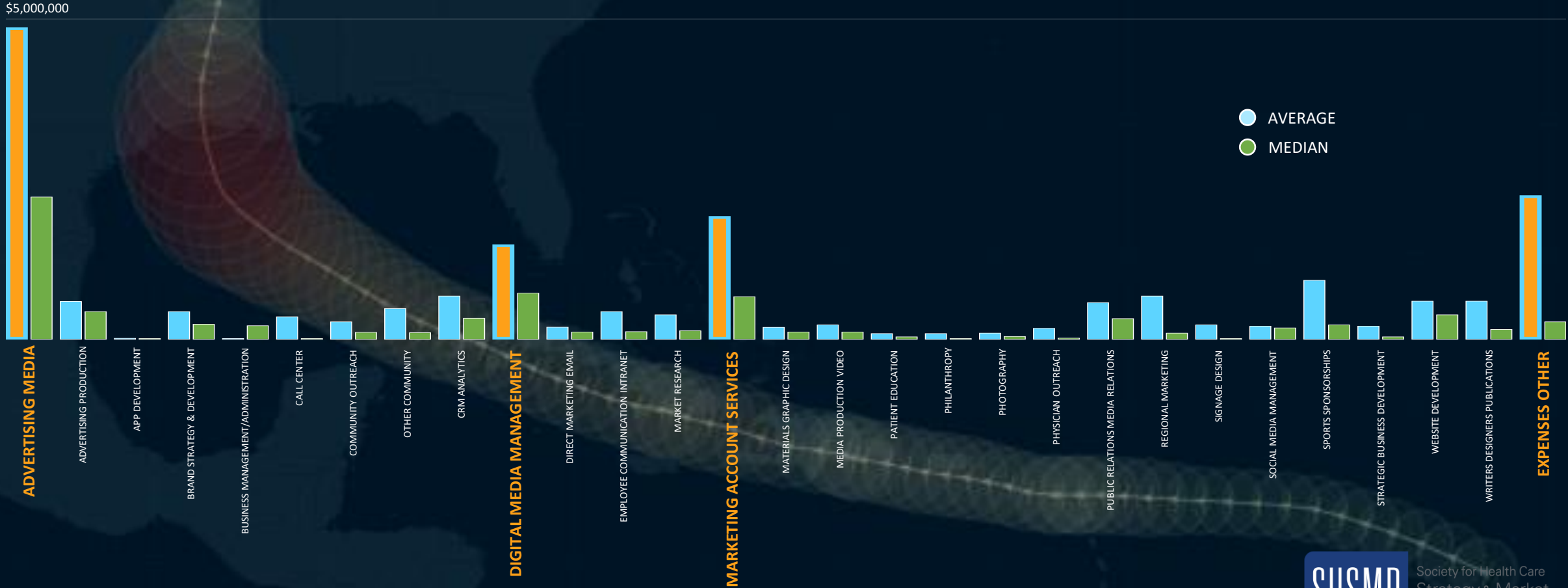
SHSMD

Society for Health Care
Strategy & Market
Development™

REPORTED EXPENSES ACROSS ACTIVITY

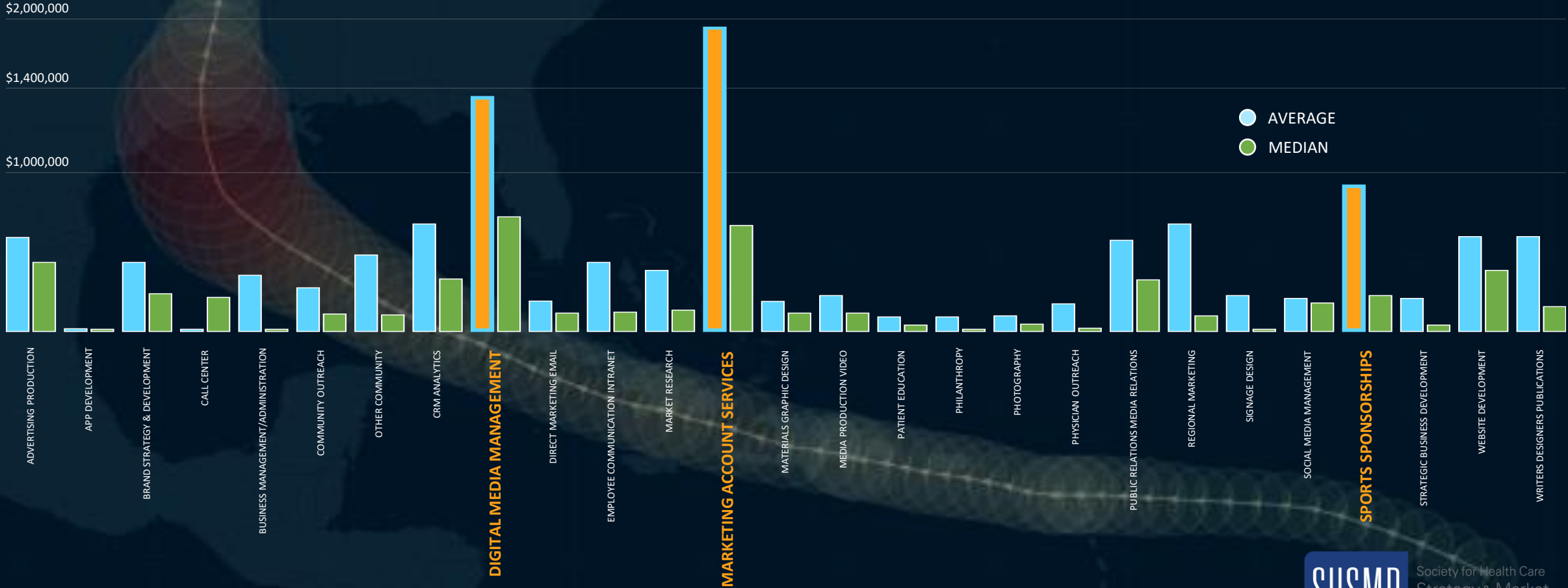
MARKETING & COMMUNICATIONS MIX

BUDGET ON MARKETING AND COMMUNICATIONS ELEMENTS



BUDGET ACROSS ACTIVITY

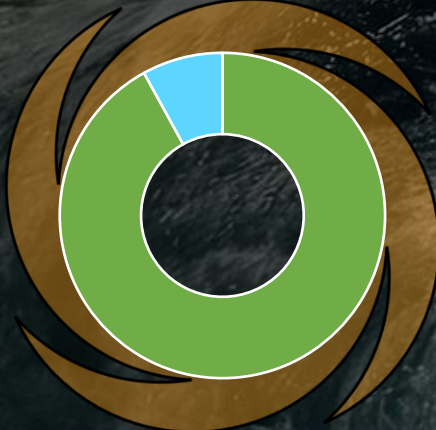
MARKETING & COMMUNICATIONS MIX



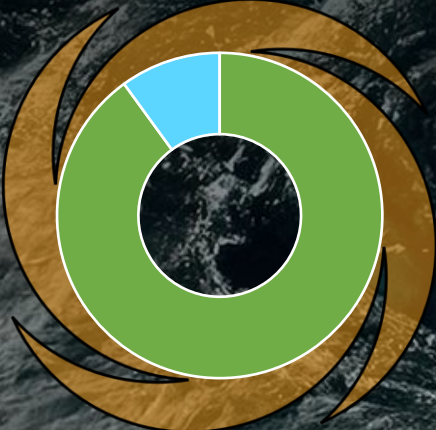
PROPORTION BUDGET

CHANGE IN DIGITAL MEDIA BUDGET THIS YEAR BY BED SIZE

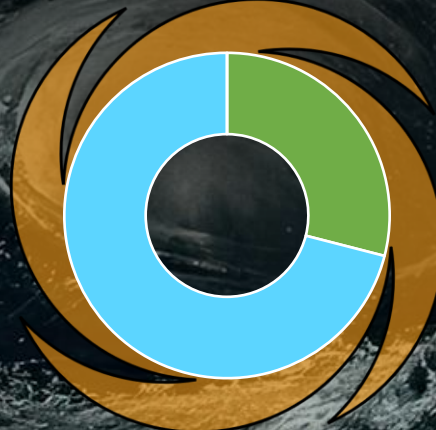
VERY LARGE: 1,500+ BEDS
N=13



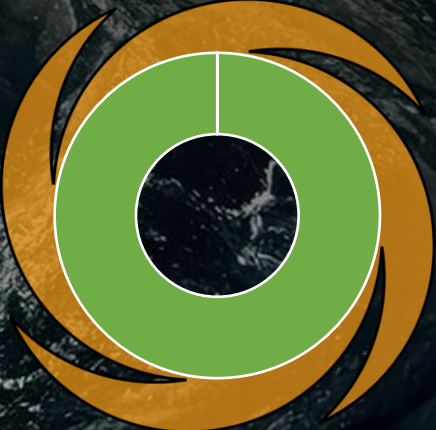
LARGE: 501-1,500 BEDS
N=10



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.

LOOKING TO THE METAVERSE

Growing popularity in the metaverse among consumers and businesses presents opportunity for first movers to establish a new outlet to drive awareness, increase traffic and provide unique experiences.

SHSMD

Society for Health Care
Strategy & Market
Development™

TRADITIONAL MEDIA BUDGET

SPEND CHANGE BY INPATIENT BED SIZE

BUDGET CHANGE IN PAST YEAR BY INPATIENT BED SIZE

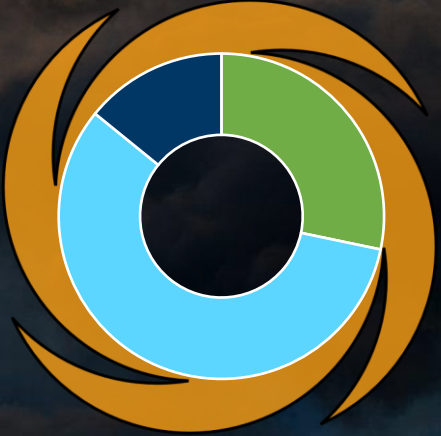
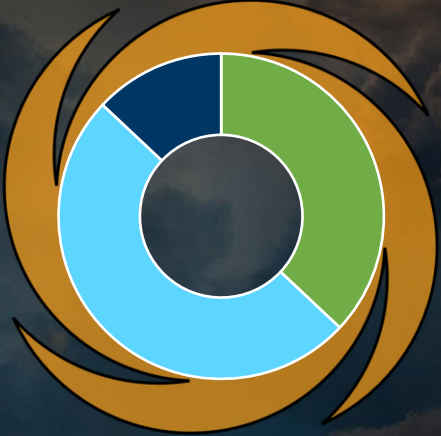
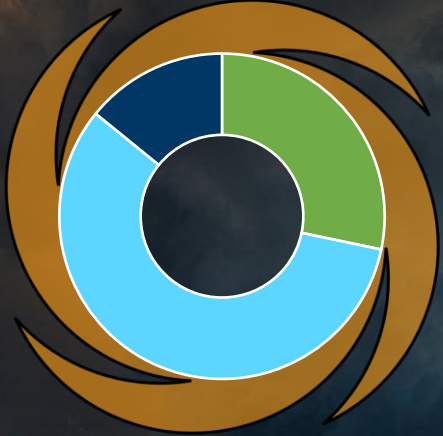
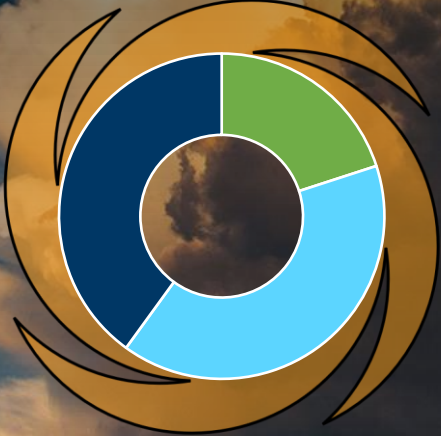
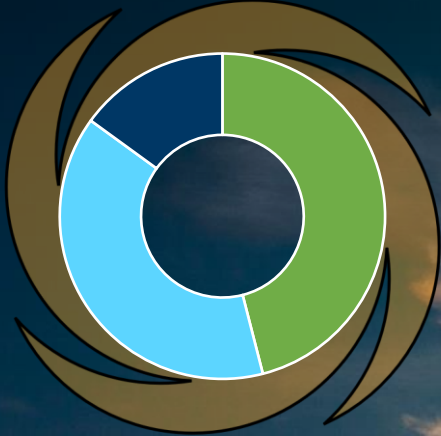
VERY LARGE: 1,500+ BEDS
N=13

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

SPORTS

MORE BANG FOR YOUR BUCK

ESPORTS MUST BE A CONSIDERATION

Esports sponsorship will reach \$837 million by end of 2022 with a global audience of 532 million

SOCIETY FOCUS ON SUSTAINABILITY

Sports continues to get attention for its role in sustainability and mental health

HUMAN CONNECTION

Teams, athletes, schools, and brands that deliver the human connection audiences crave are the future of sports marketing.

SPORTS / ATHLETE INFLUENCERS

Athletes on social media are 10X more engaging than sponsors in US Sports and have cumulative audiences larger than the channels of advertisers, publishers, sponsors and properties.

AUDIENCES TURN TO LIVESTREAMING

OTT and livestreaming platforms mean audiences can watch live sports on any device.



SHSMD

Society for Health Care
Strategy & Market
Development™

LIVING THROUGH THE STORM

NAME the storm

Stay **CONNECTED** (*e.g. CFO*)

Complete the data **CHECKLIST** (*stakeholders, esp. physician leaders*)

TRACK the storm (*dashboard*)

Ensure you don't run out of **SUPPLIES** (*data, collaboration*)

THREE KEY TAKE-AWAYS

1 ORGANIZE
Get your teams talking strategy/budgets

2 PARTICIPATE
Get your data in before you need it

3 BE STORM READY
Enroll today



2022 SHSMD CONNECTIONS

September 11-14 Washington, D.C. area



Society for Health Care Strategy & Market Development™



QUESTIONS

PLEASE BE SURE TO COMPLETE THE SESSION EVALUATION ON THE MOBILE APP!



BY THE NUMBERS: MARCOM

POWERED BY ENDEAVOR ANALYTICS

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



SPEAKER BIOGRAPHY



Alan Shoebridge

Associate Vice President for National Communication

Alan Shoebridge is the Associate Vice President for National Communication at Providence. He leads a diverse, multi-state communication team responsible for internal communication, public relations, issues management, labor relations and DE&I initiatives. Alan has also held senior marketing and communication leadership roles at Kaiser Permanente and Salinas Valley Memorial Healthcare System.

Alan has more than 15 years of direct marketing and communication experience for healthcare and medical insurance organizations with a focus on marketing plan development, advertising, messaging, research and other areas. He has also worked as a newspaper reporter and in public relations. Alan earned his BA in English from the University of Oregon.



Strategy & Market
Development™

SPEAKER BIOGRAPHY



John McKeever

Chief Growth Officer

jmckeever@endeavormgmt.com

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.



Strategy & Market
Development™