



Society for Health Care
Strategy & Market
DevelopmentSM



By the Numbers (BTN): MarCom 2024-2025

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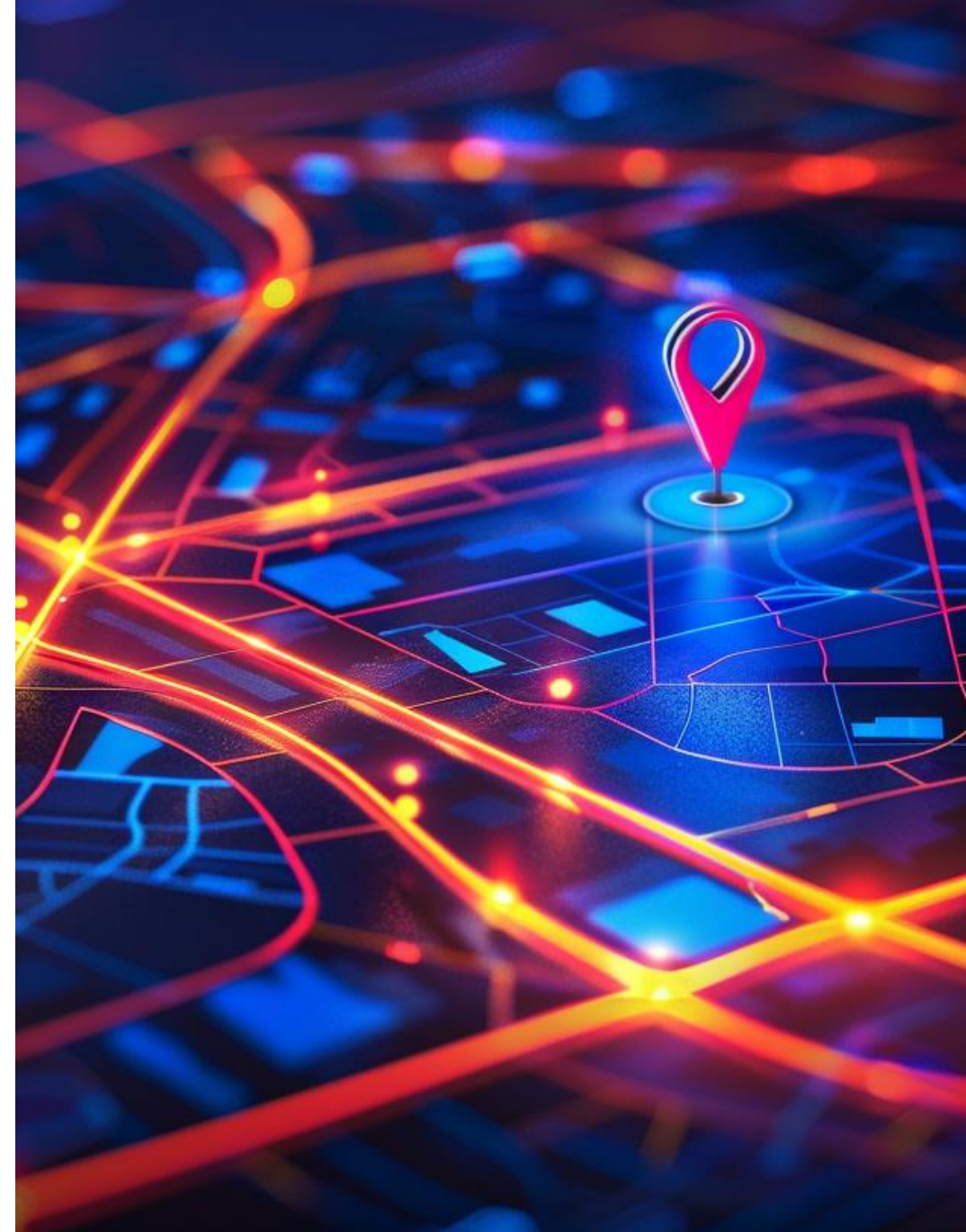
Today's Agenda

Introductions	5 minutes
Program Overview & Methodology	10 minutes
Reporting Dashboard Overview	15 minutes
Topline Data Summary	15 minutes
Q&A	15 minutes



Program Overview

- **Endeavor and SHSMD** have partnered on **By the Numbers** since **2021**
- **Built by and for healthcare MarCom leaders** to support budget and staffing decisions
- Anchored by an **annual survey** on budgets, structures, and team size
- **Survey remains open** until the next wave launches
- Free access to **interactive dashboards** with results **based on the questions you complete**
- Optional paid **subscription unlocks custom filters, tailored benchmarks, and expert support**





Methodology & Access

- 2024-2025 Survey redesigned for **ease and efficiency**
- Split into **3 shorter panels**, **aligning with content topics** to improve completion rates and sample size
- Response volume is up—but **full completions still needed**
- **Dashboard access available** for completed responses
- Reach out if you can't access the survey or results ([Panel 1 Link](#))

<u>Sample Size by Year</u>	2024-2025	2023-2024	2022-2023
Total (Panel 1 2024)	47 (of 55)	41	56
Panel 2: Budget Deep Dive	20 (of 25)	N/A	N/A
Panel 3: Org Deep Dive	20 (of 25)	N/A	N/A

Program Analysis & Dashboard Report Overview

- **Dashboard now live:** insights.endeavormgmt.com
- **Streamlined to 4 tabs:** Overview, Budget Detail, Department Structure, Benchmark
- **Key Ratios & Metrics** on Overview tab: Budget-to-Revenue Ratio, Budget, and FTEs
- **Deep dives** in **Budget Detail** and **Department Structure** tabs
- **Benchmark tab (subscribers only)** enables tailored peer comparisons



Dashboard Report: Overview Tab Example

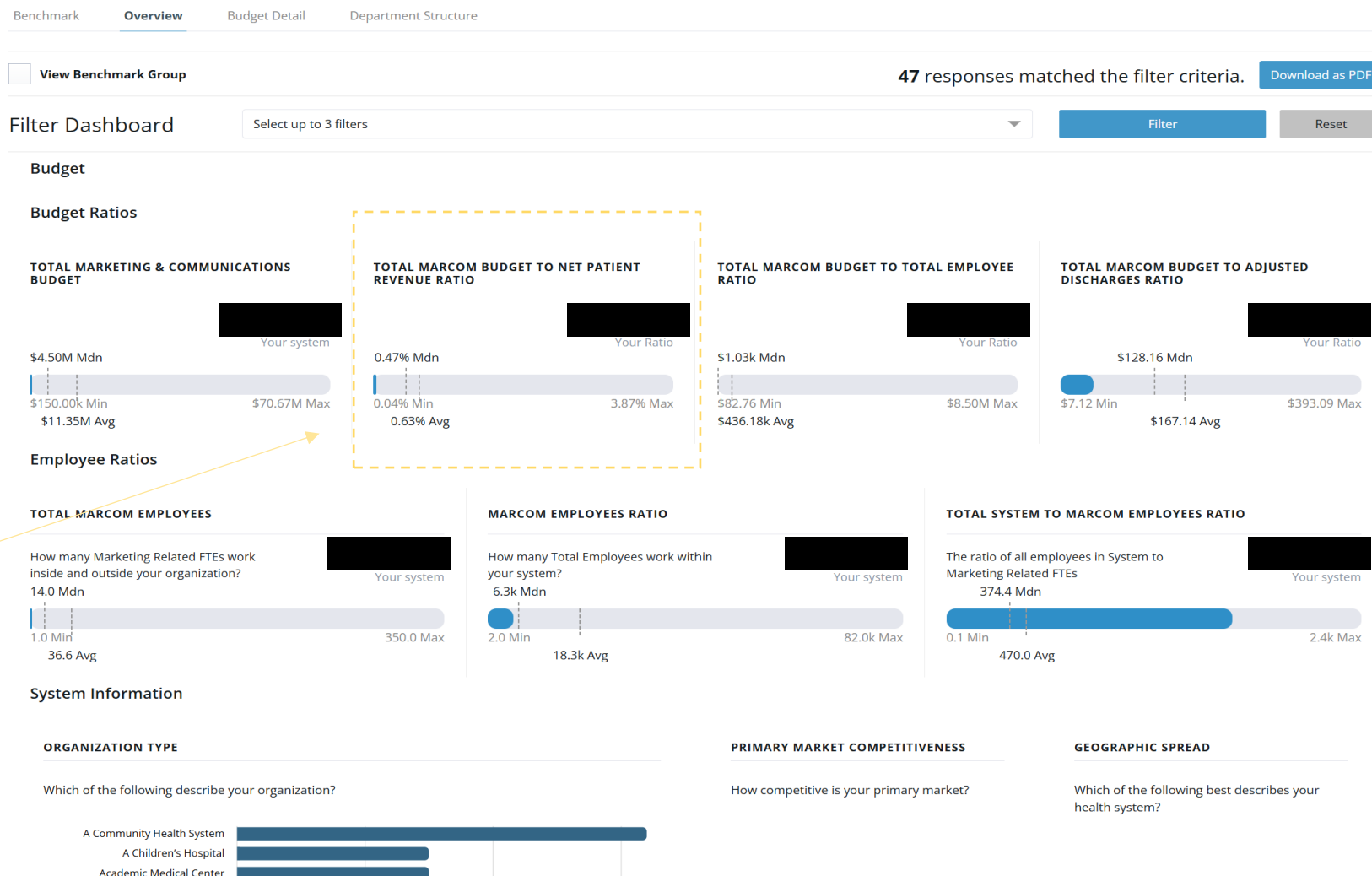
4 tabs across the top

Filters for subscribers

Key figures & ratios

Critical Benchmarking metric: Budget to Net Patient Revenue Ratio

Key profiling information

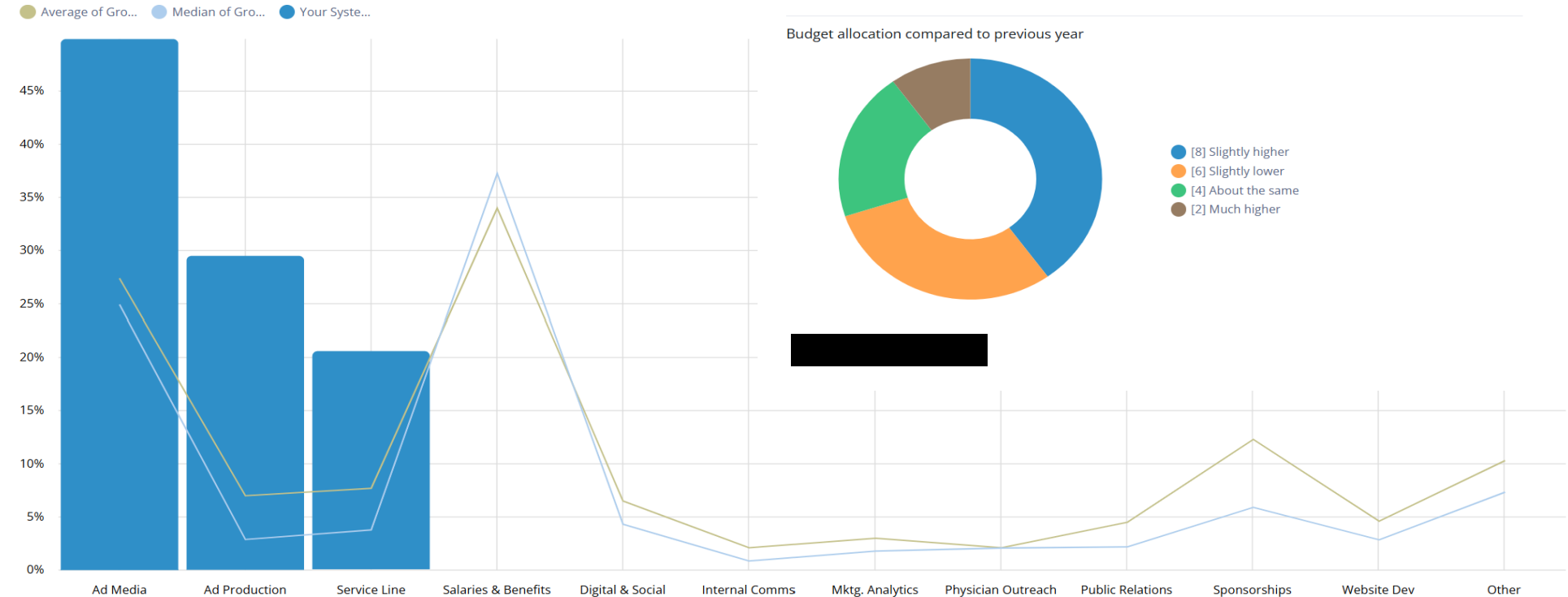


Dashboard Report: Budget Detail Example Metrics

Must Complete Panel 2

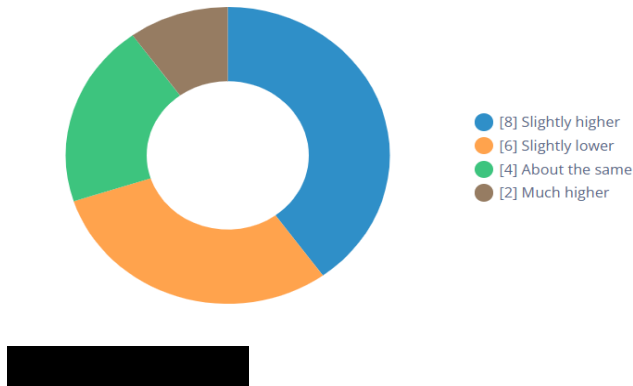
MARKETING & COMMUNICATIONS MIX

Budget Spent on Marketing & Communications Components



TOTAL MARKETING BUDGET MOMENTUM

Budget allocation compared to previous year



TOP 5 MARKETING MIX

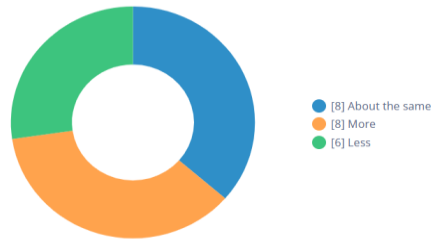
Marketing Mix	Your System	Marketing Mix	Average of Group	Marketing Mix	Median of Group
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Dashboard Report: Department Structure Example

Must Complete Panel 3

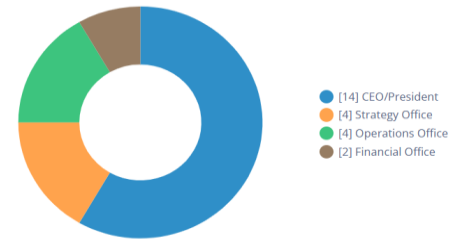
MARCOM EMPLOYEE MOMENTUM

FTE allocation compared to previous year



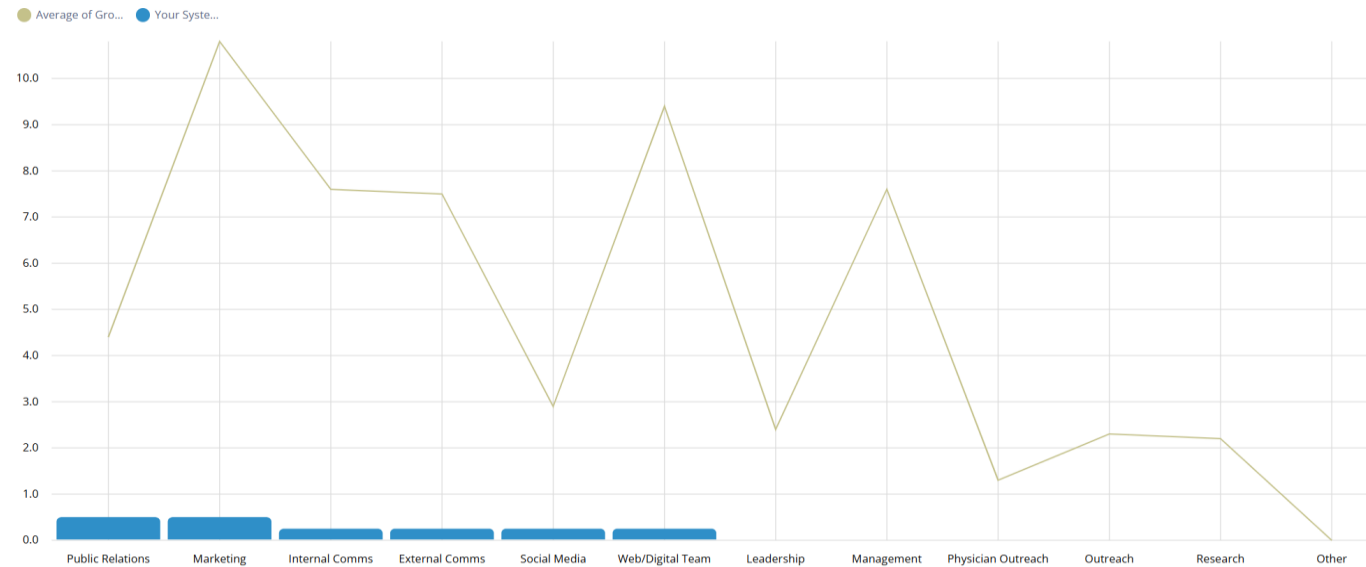
MARCOM REPORTING STRUCTURE

Where does your organization's MarCom function report to?



FTE ALLOCATION BY ROLE

Allocation of FTEs within and outside the MarCom function



Dashboard Report: Benchmark Tab Example

Must Be a Subscriber

Benchmark

Overview

Budget Detail

Department Structure

5 systems selected

Cancel

Save

STATE		Name	Net Patient Revenue	Adjusted Discharges	Staffed Beds	Hospitals Owned	State
NET PATIENT REVENUE		☐ Arkansas Children's Hospital	\$915,486,000		0	0	0 AR
ADJUSTED DISCHARGES		☐ Astera Health	\$98,000,000		0	16	1
MARKETING AND COMMUNICATIONS BUDGET		☐ Avera Health	\$9,994,754,685		144,333	1,680	37 SD
STAFFED BEDS		☒ Baptist Health Care	\$800,000,000		0	426	3 FL
MARKETING FTES		☒ Bayhealth	\$888,000,000		50,730	436	2
GEOGRAPHIC SPREAD		☐ Brookings Health System	\$78,179,484		1,346	49	1 SD
ORGANIZATION PROFIT CATEGORY		☐ CHRISTUS Health	\$6,934,000,000		0	12,000	45 TX
ORGANIZATION TYPE		☒ Capital Health	\$1,139,991,000		0	0	0
HOSPITALS OWNED		☐ Carle Health System	\$2,236,452,013		0	1,106	8 IL
MARKET COMPETITIVENESS		☒ Catholic Health System	\$1,315,200,000		0	716	4 NY
		☐ Cleveland Clinic	\$17,000,000,000		500,000	6,600	22 OH
		☐ CommUnity Care	\$132,000,000		0	0	0
		☐ Community Health System	\$200,000,000		0	0	0
		☐ Cook County Health	\$5,000,000,000		0	0	0
		☐ Deaconess Health System	\$3,000,000,000		0	0	0
		☐ Eskenazi Health	\$600,000,000		0	0	0
		☐ Fisher-Titus Medical Center	\$280,000,000		0	0	0 OH
		☐ Good Shepherd Rehabilitation Network	\$240,000,000		0	164	2
		☐ Hillside Hospital	\$91,348,872		0	0	0
		☐ Holy Cross Health Maryland	\$55,000,000		0	0	0

Previous

1

2

3

Next

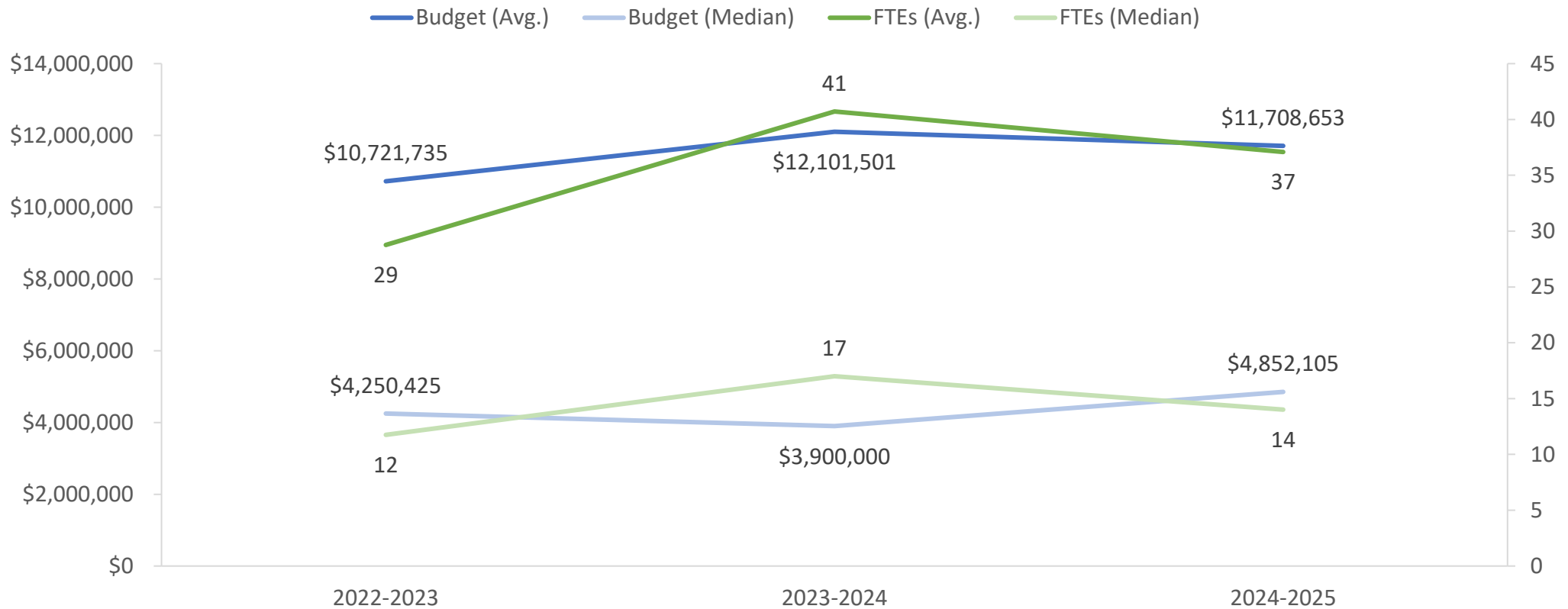
Save

Cancel

Budget and headcount up since 2022, but trend unclear year-over-year

- Averages and medians both summarize data and are important.
- **Medians** account for outliers (i.e., large systems) and better express what's “typical” among the participant base.

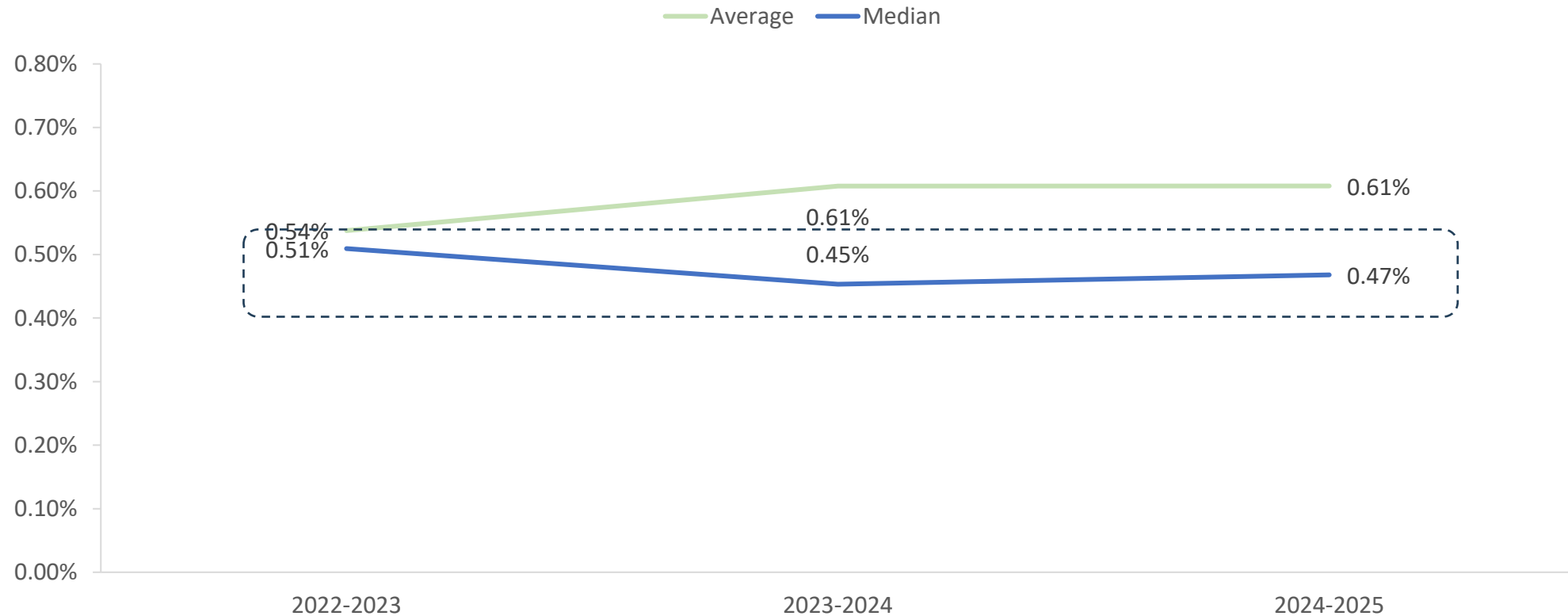
MarCom Budget & FTE Trends



Trend differs among average and median on ideal benchmarking metric

- **Recommend looking at median** for this metric because your finance teams will want to understand what's “typical”.
- **Among medians**, proportion of revenue going to MarCom is directionally down since 2022. Since budgets are growing (i.e., previous slide), this means that **budgets aren't growing as fast as net patient revenue**.

MarCom Budget to Net Patient Revenue Ratio Trend

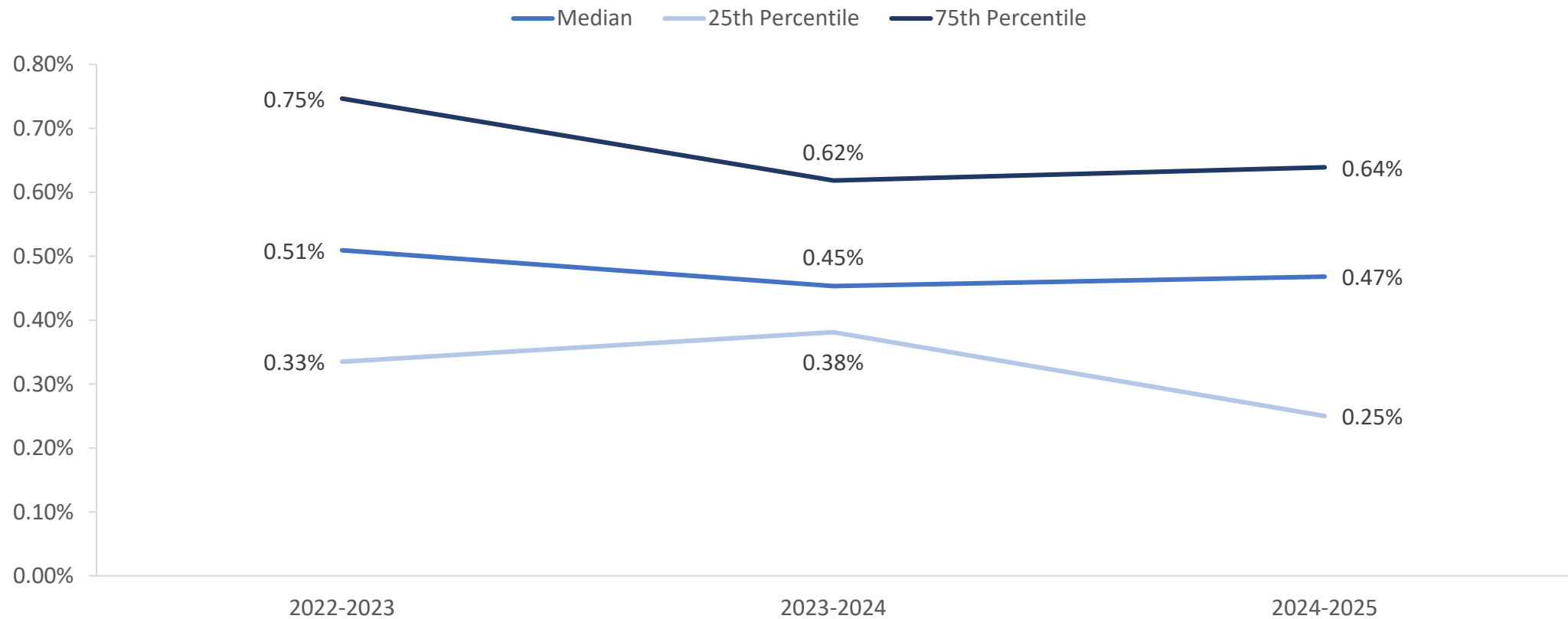


Source: MarCom BTN Surveys (2022 – 2024)

Most systems spend 0.25% - 0.64% of revenue on MarCom budgets

- While the median for the budget to net patient revenue ratio metric has remained relatively consistent since 2022, the 75th and 25th percentile have both dropped, suggesting more lower extremes and less higher extremes.

MarCom Budget to Net Patient Revenue Ratio Distribution Trends

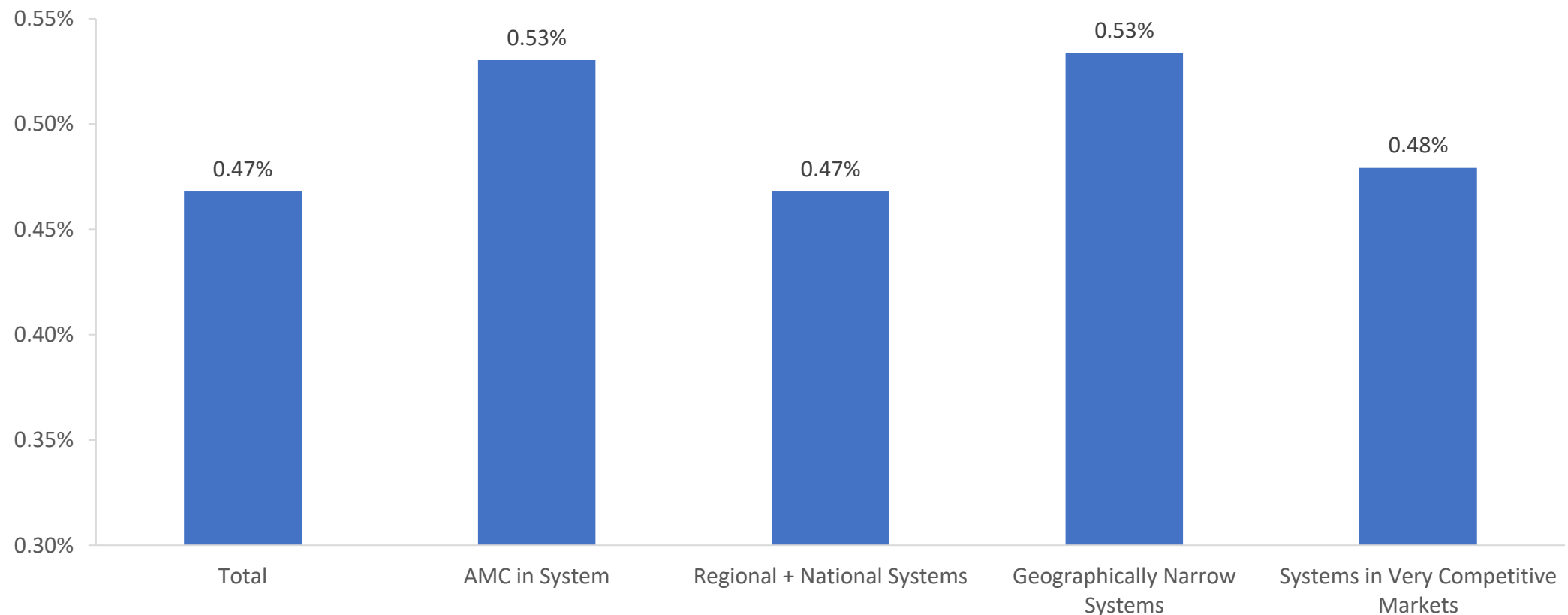


Source: MarCom BTN Surveys (2022 – 2024)

Results relatively consistent across key profiling groups

- While the medians remain relatively consistent across frequently used comparison groups, drilling into the specifics and developing apples-to-apples comparison groups can improve accuracy of comparisons.
- While seemingly small, differences of this magnitude can equate to meaningfully different budget amounts.

Median MarCom Budget to Net Patient Revenue Ratio: Deep Dive Benchmark Groups



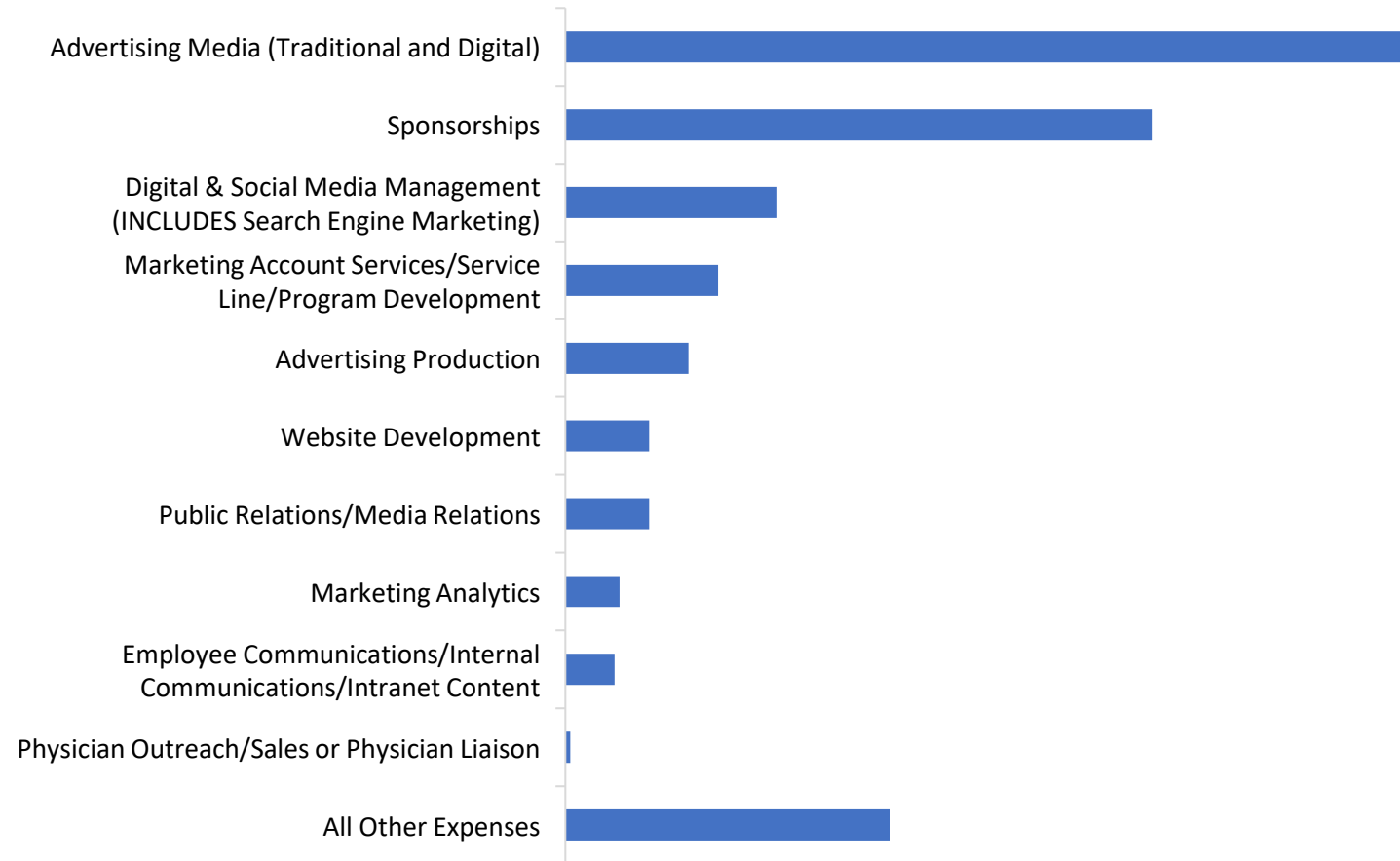
Source: 2024-2025 MarCom BTN Survey

Salaries & Benefits and Ad Media are the biggest line items in budgets

- Sponsorships is the 3rd biggest, on average, but spend varies widely among systems in the dataset – many spend \$0 on sponsorships, while some have sponsorships as their highest budget item.

MarCom Budget Detail: Deep Dive

Rounded Average among All Systems



Salaries, Wages, and Benefits

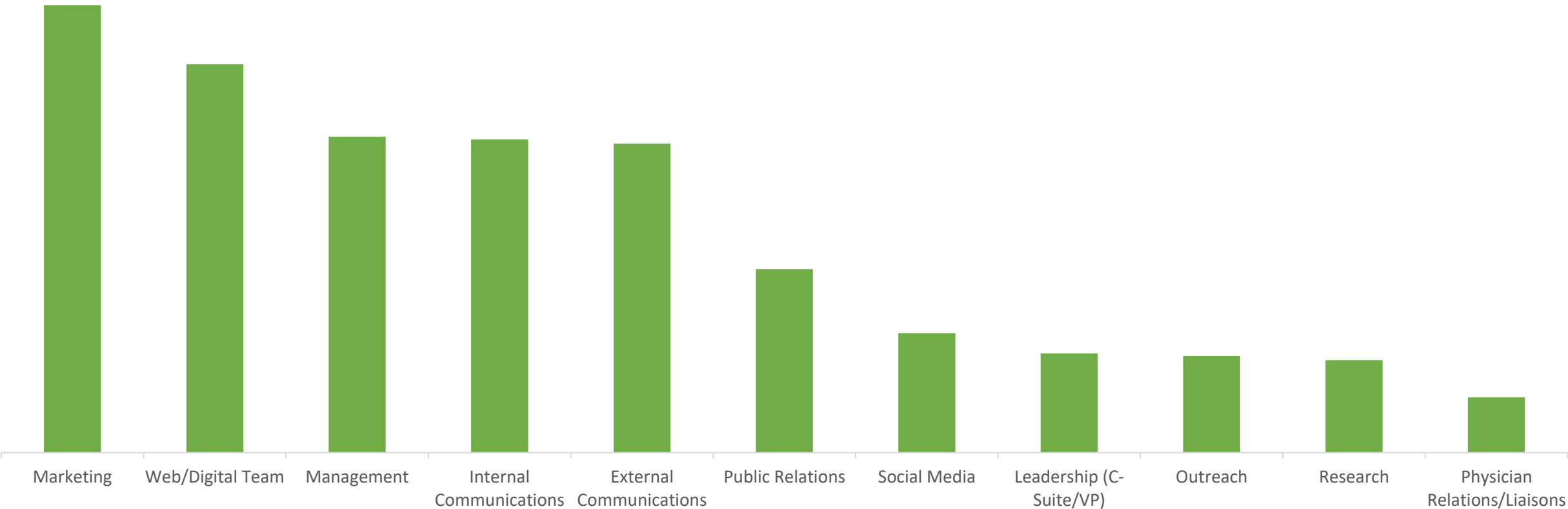
Rank
#1 Expense

Proportion
~30% of MarCom Budgets

The highest proportion of FTEs are marketing or on web/digital

MarCom Team Composition: FTE Proportion

Proportion of total MarCom FTEs among All Systems



Source: 2024-2025 MarCom BTN Survey

THANK YOU!

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NUMBERS
MARCOM
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