Society for Health Care Strategy & Market Development℠

AHA Events

By The Numbers: MarCom's Shifting Mandate

By the Numbers (BTN): MarCom 2025-2026 Program
Benchmark data for healthcare MarCom leaders navigating growth, resource pressure, and AI disruption

SHSMD Education Webinars

Endeavor
A Member of Andersen Consulting

John Breen

Managing Director

The Strategic Architect

Finds the opportunity in complexity.

Nick Reposa

Director, Marketing Research

The Data Wizard

Finds patterns hiding in plain sight.

Rachel Lott

Director, Consulting Practice

The Pragmatic Visionary

Equal parts strategist and storyteller.

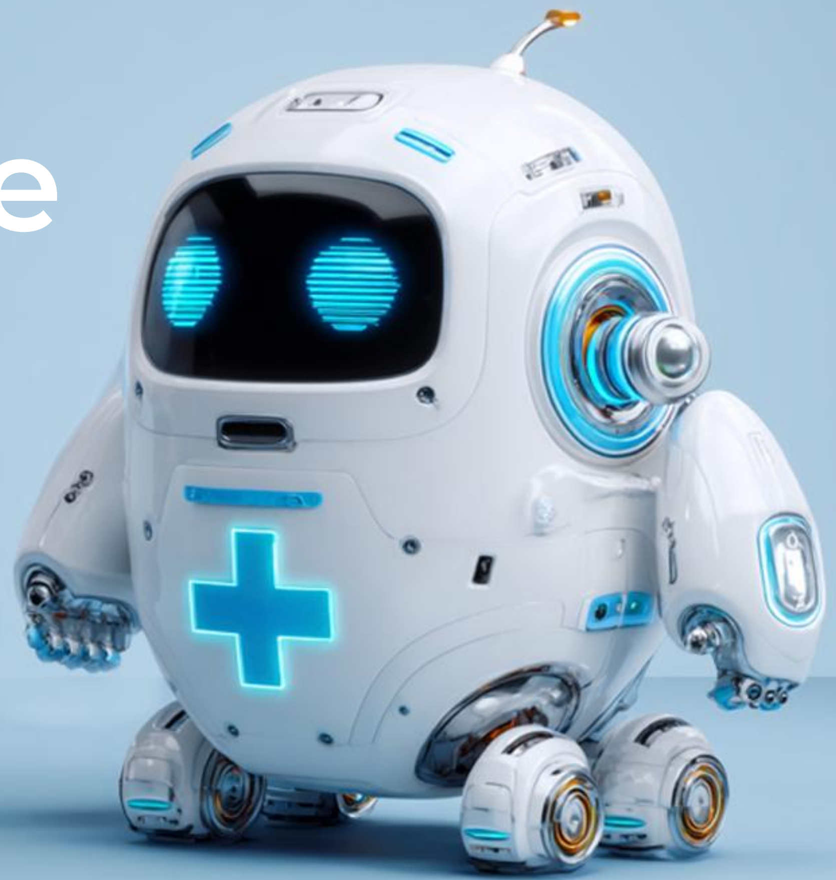
Cost Containment

AI Enablement

Revenue Growth

The growth mandate has *changed*.

How is MarCom changing with it?



About By the Numbers (BTN): MarCom

- Partnership between **Endeavor and SHSMD since 2021**
- **Built by and for healthcare MarCom leaders** to support budget, staffing, and resource decisions
- Anchored by an **annual survey**
- **Free Interactive dashboard reports**
- **Paid subscriber upgrade**

SAMPLE SIZE BY YEAR

	2025-2026	2024-2025	2023-2024	2022-2023
Panel 1: **Core Benchmarks** *(Total Pre-2024)*	63	63	41	56
Panel 2: **Budget Deep Dive**	25	28	-	-
Panel 3: **Team Deep Dive**	24	29	-	-
Panel 4: **AI Deep Dive**	20	-	-	-

01
Growth demands

are outpacing MarCom investments.

02
MarCom capabilities

must evolve to support the next stage of growth.

03
AI can expand capacity,

but organizational readiness remains the limiting factor.

Growth is rising as a priority, but budgets are under pressure.

85%

of respondents say **Growth is a Top MarCom Priority**

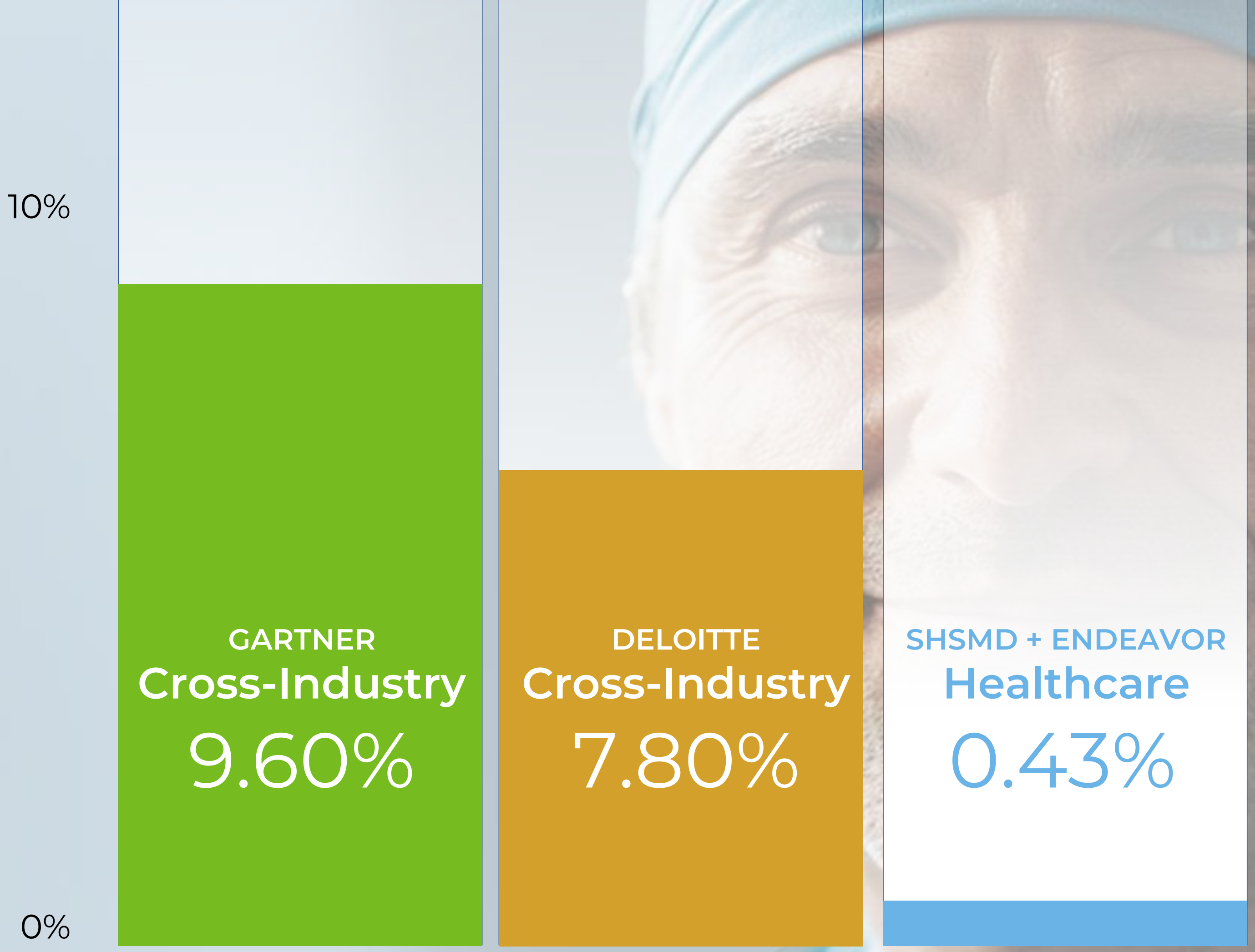
68%

report MarCom budgets **flat or down vs. prior year +24pp YoY**

Sources: BTN: MarCom 2025–2026 Panel 4; Q38. Which of the following are key strategic priorities for your MarCom organization? Select up to 5. n=20.

MarCom is funded like a cost center.

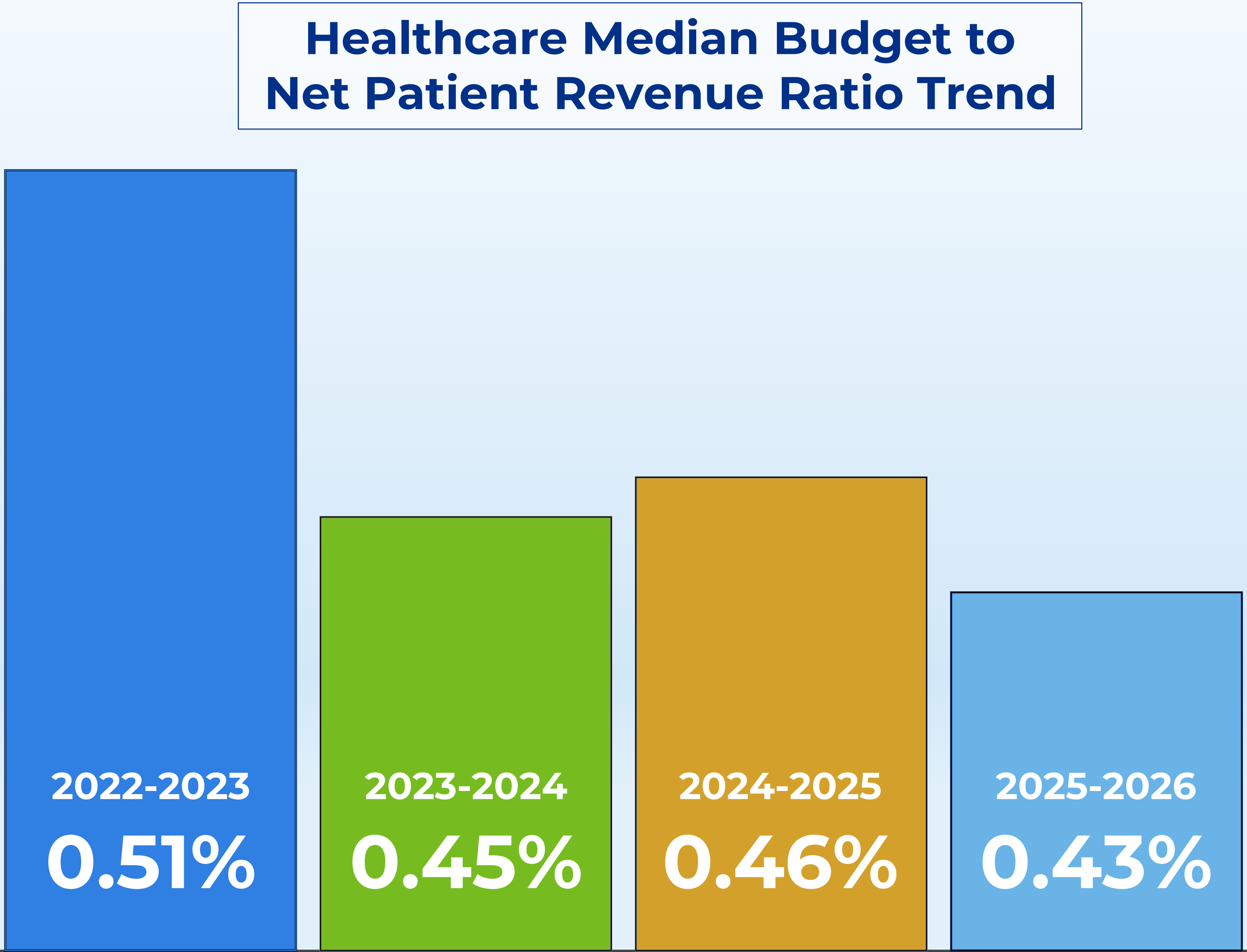
Cross-Industry Median Budget to Revenue Ratio*



*Note: Cross-industry benchmarks are not directly apples-to-apples with provider MarCom budget-to-net patient revenue ratios, but they provide directional context on relative investment levels.

Sources: Gartner, Insights from the 2026 CMO Spend Survey (n=401); Duke | Fuqua, Deloitte, AMA, 2026 The CMO Survey® (n=146); SHSMD, Endeavor, BTN, MarCom 2025-2026 (n=60).

Growth expectations are rising, but relative MarCom investment has declined.



Sources: SHSMD, Endeavor, BTN, MarCom Surveys 2022-2026.

Note: .51% (22-23 Median) - .43% (25-26 Median) = .08pp; .08% * 1B Revenue = $800K

Growth expectations are rising, but relative MarCom investment has declined.

Sources: SHSMD, Endeavor, BTN, MarCom Surveys 2022-2026.

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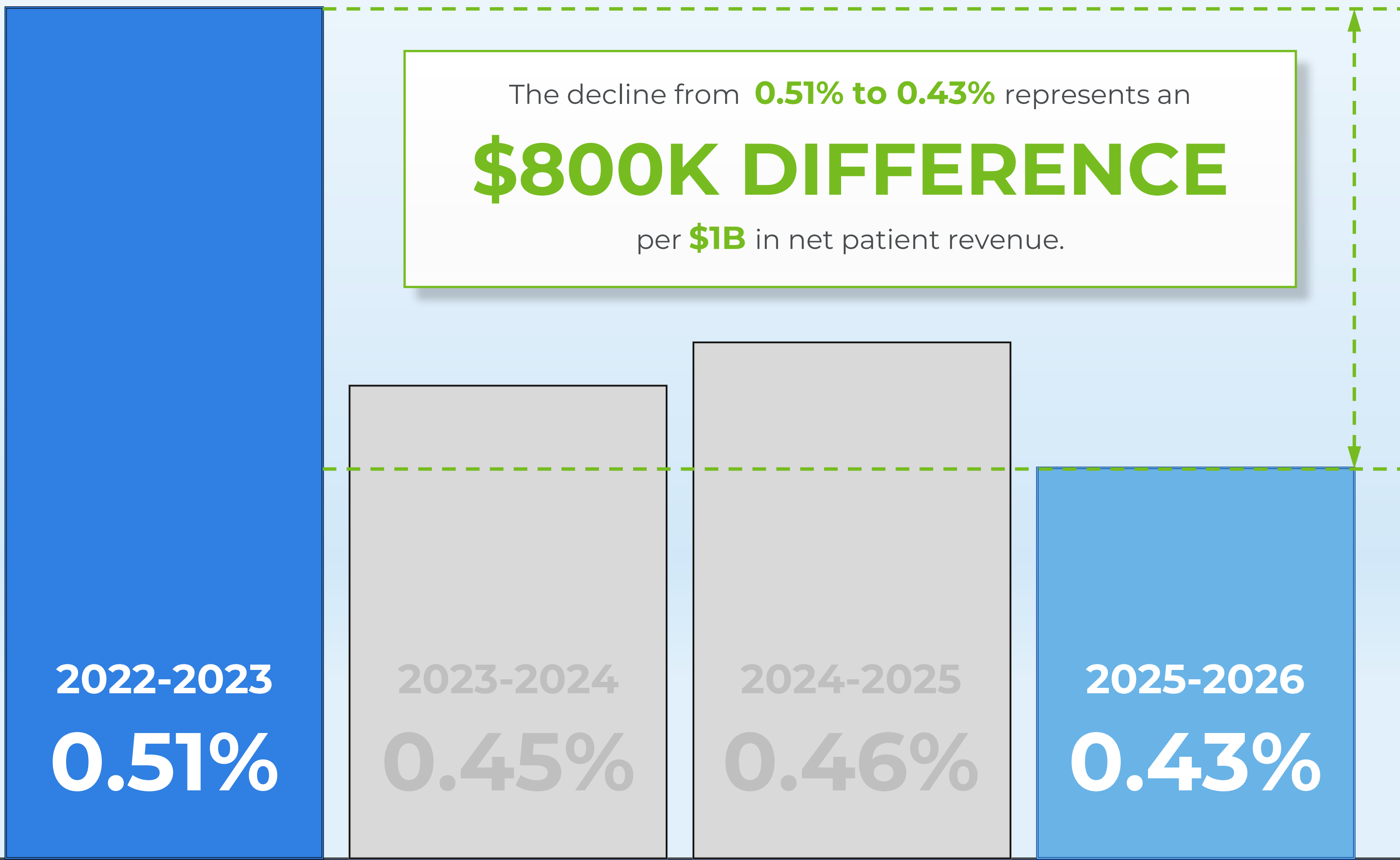
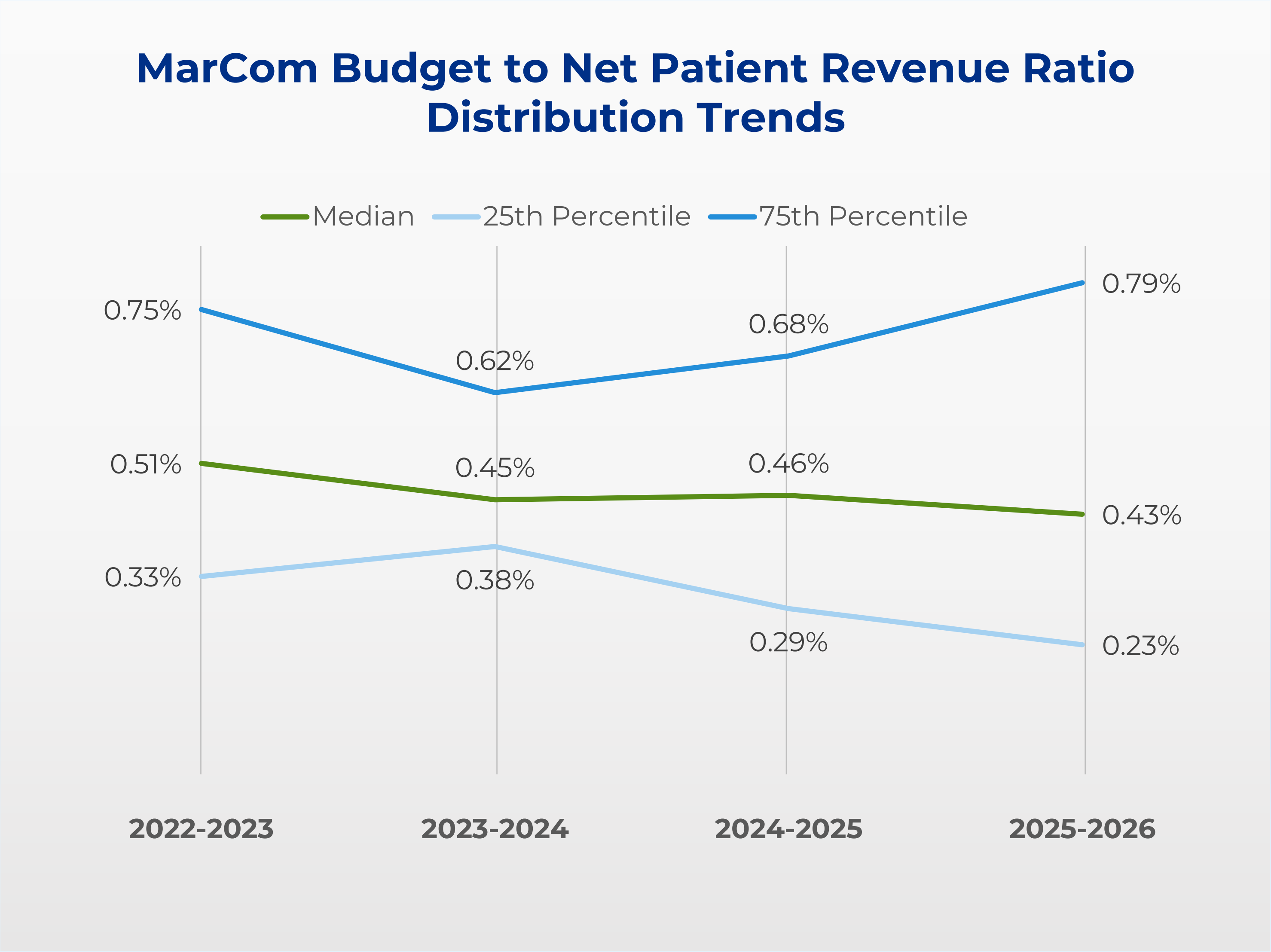
Healthcare Median Budget to Net Patient Revenue Ratio Trend



Two MarCom models are emerging: Is your team a growth engine or support function?



Sources: SHSMD, Endeavor, BTN, MarCom Surveys 2022-2026.

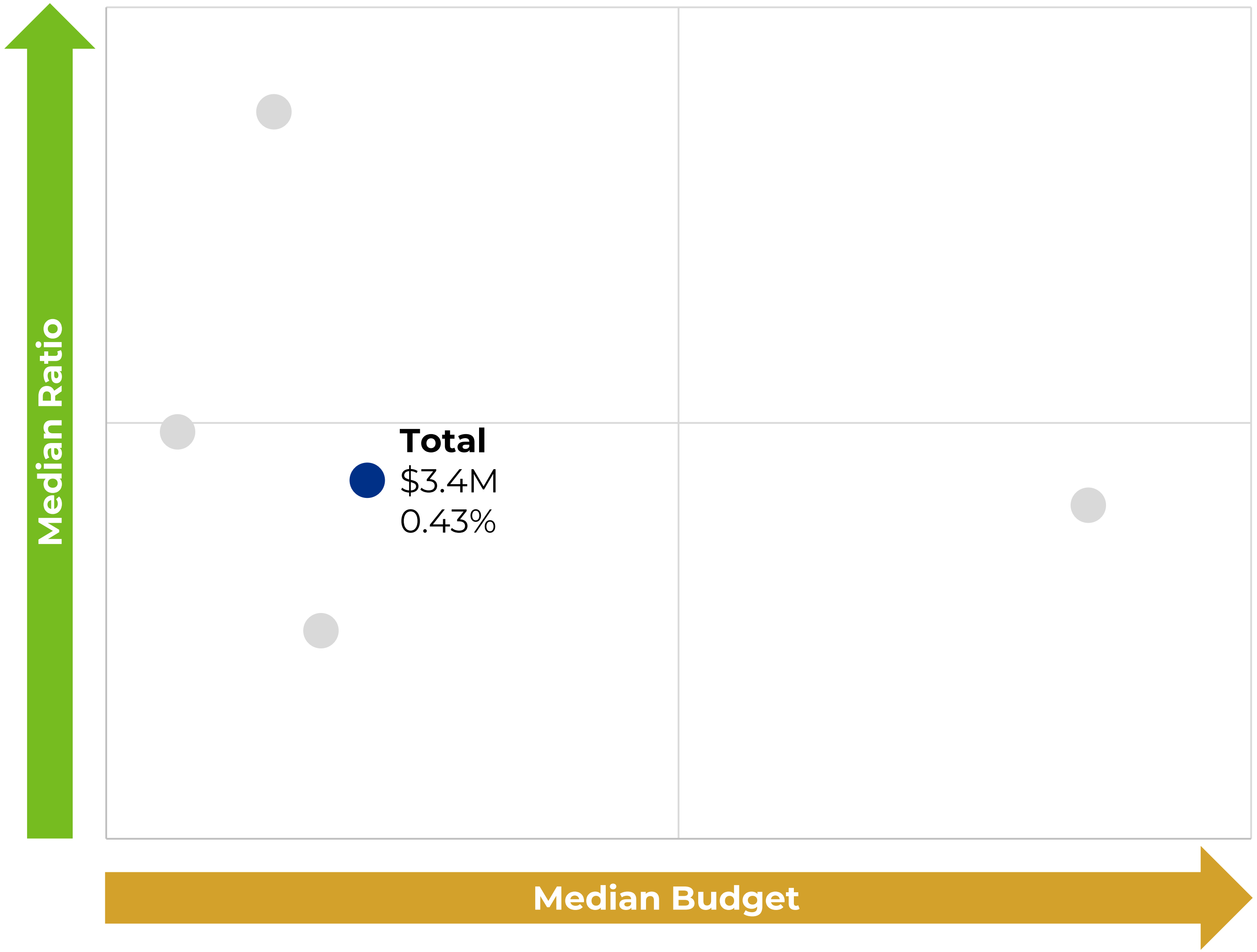
Investment gaps become growth capability gaps.

System With $1B Revenue

$7.9M	**Budget at 75th Percentile** (Ratio = 0.79%)
− $2.3M	**Budget at 25th Percentile** (Ratio = 0.23%)
$5.6M	**Potential Growth Capability Gap**

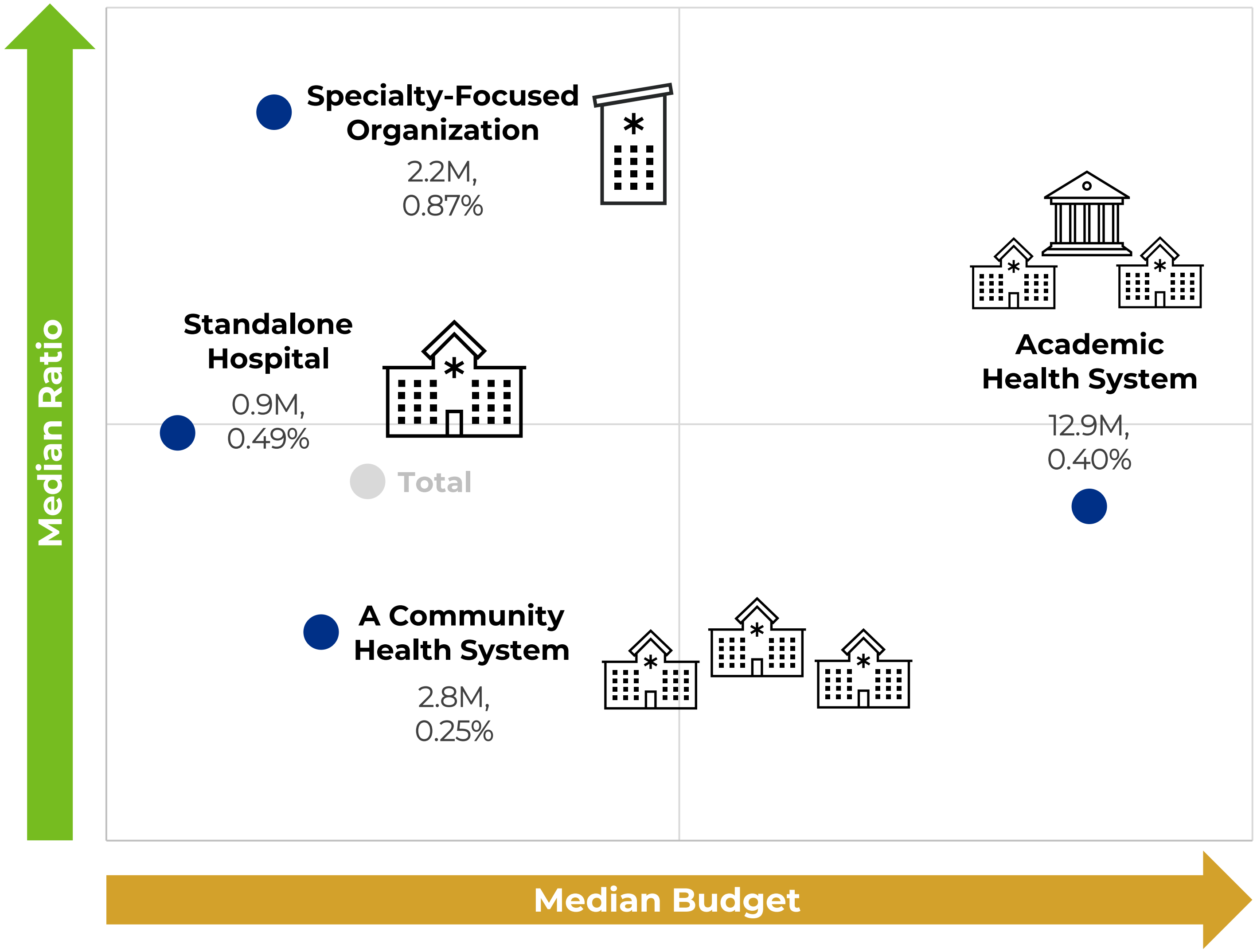
Source: BTN: MarCom 2025–2026 Panel 1;. n=60.

Typical MarCom budget is $3.4M – but what is typical?



Source: BTN: MarCom 2025–2026 Panel 1;. Total n=60; n >= 11 among subgroups.

Scale and specialization change what typical looks like.



Source: BTN: MarCom 2025–2026 Panel 1;. Total n=60; n >= 11 among subgroups.

Poll: If you had an additional ~$1 million dollars to invest, where would it go first?

- Physician Marketing / Outreach
- Digital & Social Channels
- Creative & Content Development
- Service Line / Program Marketing
- Advertising & Promotion
- Brand/Reputation Management
- Marketing Research, Analytics & Intelligence
- AI Tools and Training

Budgets are shifting toward more direct growth levers.

BUDGET ACTIVITY MIX

HIGHEST % OF BUDGET	MEDIUM % OF BUDGET	LOWEST % OF BUDGET
— Salaries, wages, and benefits	— Digital & Social	▲ Internal & External Comms
▼ Advertising	▲ Physician Outreach	▼ Marketing Research & Analytics
	▲ Website Development	— Creative & Content Development
	— Service/Line Program Marketing	
	▼ Sponsorships	

Source: BTN: MarCom 2024–2026 Panel 2;. n=18. Outliers removed. ▲ = Directionally higher YoY. ▼ = Directionally down YoY. — = Flat / no change YoY.

Growth responsibilities are expanding faster than internal capabilities.

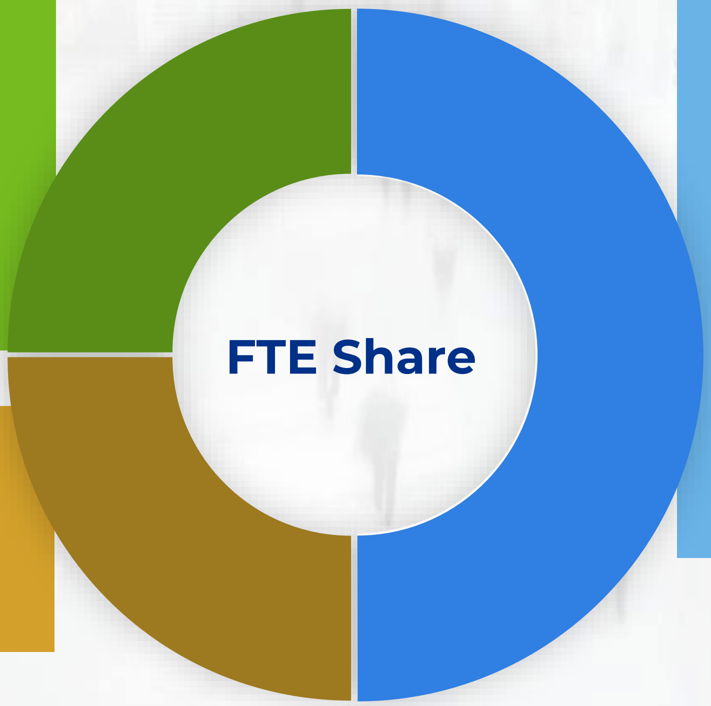
¼ FTE SHARE

Growth / Intelligence Capabilities

- Research, Strategy, Analytics
- Web/Digital
- Service Line
- Physician outreach

¼ FTE SHARE

Leadership / Management



½ FTE SHARE

Core Delivery Capabilities

- General/Brand Marketers
- Creative Designers
- Social Media
- Internal Comms
- External Comms / PR / Media Relations
- Community Outreach

Source: BTN: MarCom 2025–2026 Panel 3. n=24.

AI is creating both momentum and unease.

UNCERTAINTY
- Potential Role Changes
- Potential FTE Count Changes

ANXIETY
- Resistance
- Limit Creativity

OPTIMISM
- AI Adoption Enthusiasm
- Productivity Gains

Source: BTN: MarCom 2025–2026 Panel 4. n=20.

AI is in the workflow, but not yet fully enabled.

CURRENT AI USAGE IS CONCENTRATED IN FAMILIAR TASKS[1]

HIGH USAGE
- Copywriting / text generation

MEDIUM USAGE
- Press release drafting / optimization
- SEO

SOME USAGE
- Visual or multimedia content generation
- Data analysis, sentiment analysis and insights generation

OTHER INDUSTRIES EXTENDING FASTER[2]

Across industries, AI use is already extending beyond content creation into personalization, automation, targeting, reporting, predictive analytics, and marketing ROI optimization.

Source: [1]BTN: MarCom 2025–2026 Panel 4. n=20; [2]Duke | Fuqua, Deloitte, AMA, 2026 The CMO Survey® (n=146).

To scale AI usage further, MarCom teams need:

CONSISTENT, CLEAR LEADERSHIP VISION AND SUPPORT

SKILLS AND TRAINING TO LEVERAGE TOOLS

CLEAR GOVERNANCE AND ACCESS TO THE RIGHT TOOLS

Source: BTN: MarCom 2025–2026 Panel 4. n=20; 2Duke | Fuqua, Deloitte, AMA, 2026 The CMO Survey® (n=146).

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Here’s What We Think

Benchmarks aren’t the answer. They’re the beginning of a more meaningful conversation with your leaders.

Use the data to move beyond comparing budgets and staffing—and start asking whether your MarCom function is positioned to accelerate growth.

Consider:

- How well are our investments aligned with our organization's growth priorities?
- What capabilities will MarCom need three years from now—not just today?
- Where can technology and AI create the greatest leverage?
- Which resource constraints are limiting our ability to create value?
- What will it take to reposition MarCom from a cost center to a true growth partner?

What You Can Do Today

- Understand your baseline
- Align on MarCom's role
- Pinpoint capabilities gaps
- Prioritize initiatives and investments
- Leverage the data to build credibility

The value of BTN is more than just knowing where you stand today.

It's helping shape where MarCom needs to go next.

THANK YOU!

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