



# HEALTHCARE

**LEAP GROUP**



**ALL RESEARCH AND FOCUS GROUPS ATTRIBUTED WERE PROVIDED BY LEAP GROUP'S RESEARCH AND ANALYTICS TEAM, LEAP PANEL, WHICH HOSTED FOCUS GROUPS CENTERED AROUND CONSUMERS INTERACTIONS WITH THEIR CURRENT HEALTHCARE COMPANY, THE COMPANY'S WEBSITE'S AND THE PROVIDER'S APPS.**

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# INTRODUCTION

Following their first full-time job, turning 26 is the next rite-of-passage for Millennials.

At that age, they can no longer partake in their parents insurance, but must partner with their employer's provider or research the right provider for themselves and begin paying for their healthcare insurance.

With vast access to information and social media, patients are more empowered than ever to share thoughts on their treatment and their overall wellness. In today's digital age, it's just as important healthcare organizations feel the same confidence – in their brand and with their technology – to talk back.

The Millennial generation has grown up with technology at their fingertips. They know how to work tablets, iPhones, laptops and DOOH billboards. But most don't utilize their phone app.

Though advanced in their own field, our research has found patients believe healthcare organizations have catching up to do in terms of connecting with their consumers, or potential consumers, digitally. Through a series of in-person panels, patients and potential patients have told us their accessibility to healthcare seems limited because their attainability to healthcare organizations feels limited.

Advancements such as chatbots, social media reviews, video conferences and the infamous WebMD leave little room for excuses in terms of a Millennial to healthcare relationship. Today's digital marketing world shows Millennial patients are no longer wanting to simply be treated.

**They want to be cared for.**

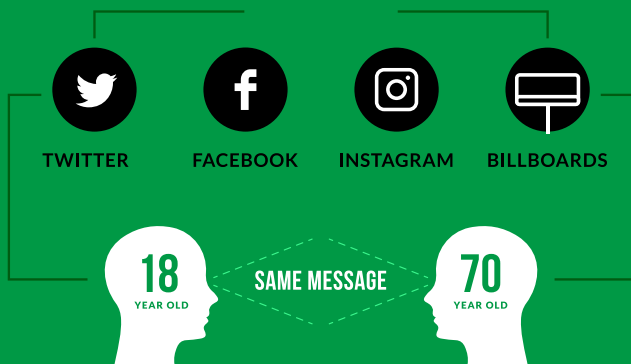
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# ONE-TO-ONE MARKETING

It's no secret Millennials expect their online experience to be personalized to them, no matter what they're browsing.

## MASS MARKETING

SAME CONTENT,  
PUBLISHED ON ALL THE SAME CHANNELS



## ONE-TO-ONE MARKETING

PERSONA DEVELOPEMENT,  
DIFFERENT MESSAGES ON DIFFERENT CHANNELS



Most healthcare organizations still operate in a “mass” modus operandi. One message, one purpose and the same content on all channels for all consumers.

This method does not recognize the difference between an 18-year-old female seeking a routine doctor, and a 70-year-old man seeking answers on his difficulty breathing. The message is the same for all consumers and the message is the same across all channels – email, social and web.

Before a company can begin personalizing their marketing tactics, the brand must go through LEAP Group's Matter More Method. This phase dives deep into the makeup of a brand. How they operate. What differentiates them from their competition. Why they're important to the market. And, finally, discovering their demographic – where they are spending their time and with whom they are spending time.

## THE MATTER MORE METHOD



This information, though a lot, allows the brand to understand exactly who it is talking to, exemplifying a part of the brand's consumers.

Ultimately, this phase puts a face to a list of psychographic information.

Particular to the Millennial group, the Matter More Method allows organizations to understand where Millennials are spending their time – online, social media, etc. – which then begins the process of strategizing their content. They can understand what Millennials are searching, what kind of questions they’re asking and even dive deep into the medical questions they need answered.

Beyond the Matter More Method, the online experience must be continuously tailored with each new piece of information learned about the user, through conversations, cached searches, website crawls, etc. And a conversation, or a search, should pick up where the last conversation left off. Our panelists told us a login provides more of a relationship between them and their healthcare organization, rather than cookies. Not logged in, our panelists said they sense a “Big Brother” vibe when their information automatically populates the screen. But having the opportunity to login feels secure and inclusive.

## **“THE MATTER MORE METHOD ALLOWS ORGANIZATIONS TO UNDERSTAND WHERE MILLENNIALS ARE SPENDING THEIR TIME...”**

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Finally, the second most important aspect of a website, according to our panelists, was pricing transparency. It’s no secret healthcare is not the cheapest service in the world, however panelists told us they specifically look for up-front pricing, pricing estimates or a pricing policy.

## **MILLENNIAL PATIENT ACQUISITION**

There are few organizations or categories not currently focused on how to attract, convert and retain Millennials. Healthcare is no different.

Today, Millennials make up more than one-fourth of the population. While much has been written about their tech prowess and their need for speed, they are still human and we need to first debunk and perhaps confirm a few myths before discussing the best way to attract them.



## **MYTH ONE**

**“MILLENNIALS  
DON'T CARE ABOUT  
THEIR HEALTH”**

### **FALSE.**

Millennials define health differently from their older counterparts. This is influenced by their dominant use of wearable technology and access to online information. From the food they put into their bodies to the fitness app they use on their smartphone and wrist, health is seen as part of their daily lives and a way of living.

Also, a recent Cassandra Report found that 80 percent of Millennials spend one-fourth of their disposable income on holistic wellness and related products, such as Yoga, seeing this as a viable option to traditional healthcare.

The bottom line here: Millennials care about their health, but simply don't trust doctors just like they don't trust brands. In fact, a Hailey Sault study reveals while 63 percent of Millennials trust their current doctor, they are more likely to trust WebMD or other online medical diagnosis destinations.



**MYTH TWO**  
**“MILLENNIALS**  
**DON'T TRUST ADS”**

**TRUE.**

Paired with the suspected end of real-time TV (other than sporting events), Millennials now demand only content that pleases them and continues to block the noise.

So, they block them. Why? Because they do not like to be sold to. They don't trust what brands say about themselves and they want content they believe enriches their lives.

**41%**

**OF MILLENNIALS WILL**  
**USE AD BLOCKERS IN**  
**2018, WHILE GEN X**  
**INTERNET USERS WILL**  
**BE AROUND 26%.**

**-eMarketer**





**MYTH THREE**  
**“MILLENNIALS**  
**ARE SOCIAL MEDIA**  
**BAND-WAGONER’S”**

**FALSE.**

Millennials do love social media, however, Millennials turn to social media for two things: friends and credible advice – not just for the sake of jumping on the bandwagon. They aren’t on social media because they are seeking to connect with brands, but rather to share and consume with those they know and have deemed credible in their minds.

Celebrity-sponsored posts often lend credibility. But our research is proving influencers are becoming the de facto experts in the online community. Influencers can take the form of celebrities and even in-house subject matter experts from your local healthcare provider. Further, Millennials are trusting influencers more than celebrities.

## SUMMARY

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Millennials do care about their health, but don’t always connect with their doctor or healthcare network.

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Millennials see social media as an integral part of their everyday information gathering.

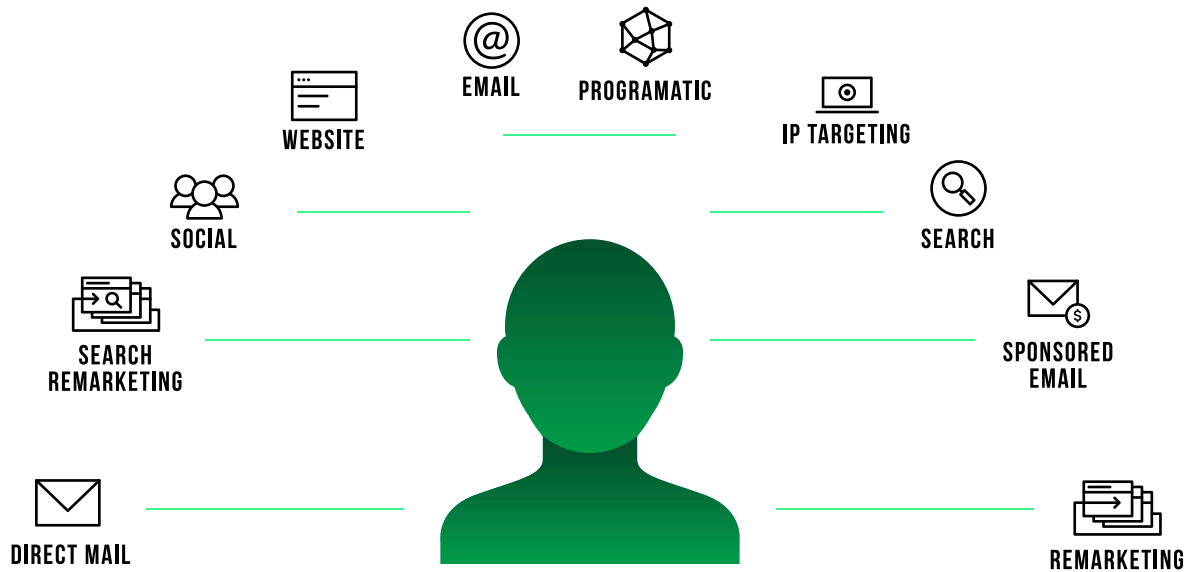
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Millennials don’t like ads and often block them when they can.

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# THE CHANGING PATIENT

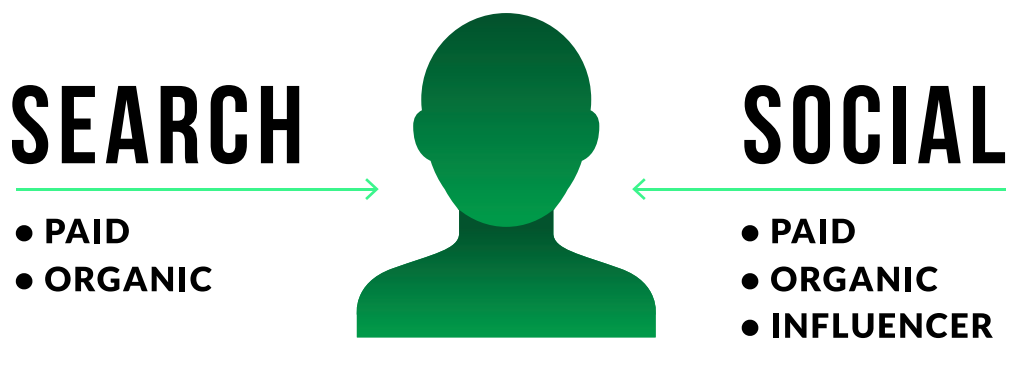


**BOTTOM LINE:** Most Millennials hate advertising. As we stated earlier, nearly half of Millennials block ads when possible. So it may seem like a waste to spend money not only serving them an ad, but then hitting them over the head with subsequent remarketed ads.

But we believe we've cracked the code on marketing to the Millennial demographic. There are two key parts to a solid digital approach that can win the Millennial: search and social.

Millennials, more than any other generation, use Google to find information about medical needs and to seek information on healthcare providers. Millennials also use social media much more than their older counterparts to do the same.

**So, a Millennial patient acquisition plan begins to look more like this:**



So how does search work? Can I just point them to our services page for more information?

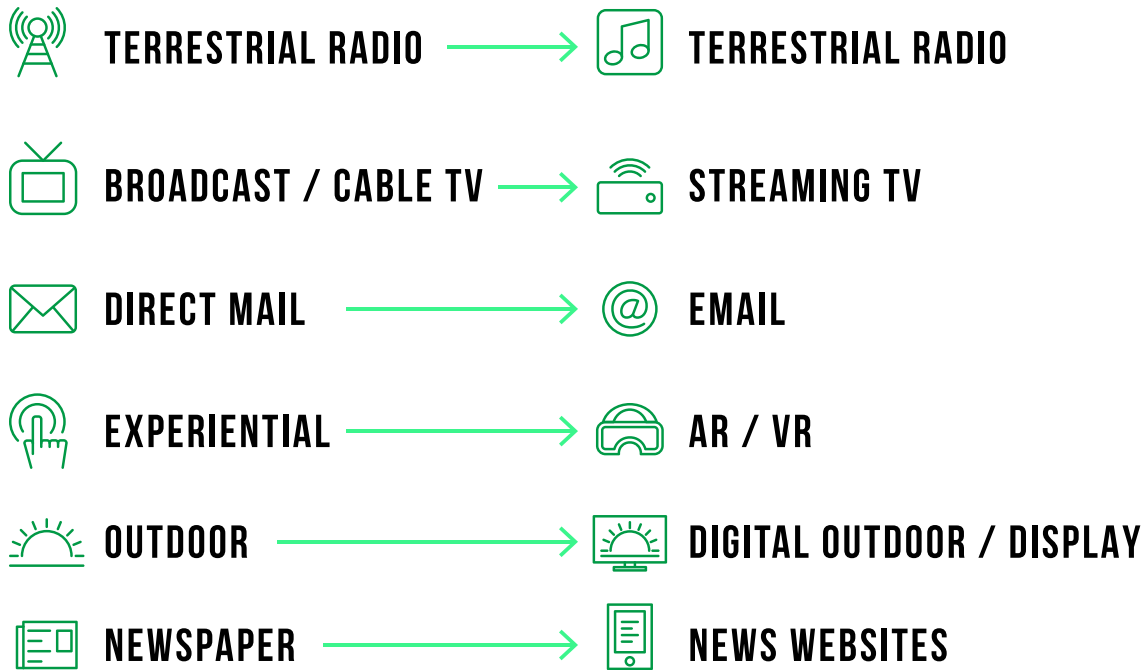
**NOPE.**

You need to provide content that will engage the Millennial and provide them a solution or an answer, not marketing speak about all of your wonderful services. Remember, to a Millennial, your website is a marketing message not to be trusted and, frankly, not to be visited unless it provides something compelling.

Why do you think WebMD is one of the most trusted sources of medial information for the Millennial? Because it is considered a neutral source. It is not pushing a brand agenda and does not represent a provider, it is a resource for information.

## WHAT ABOUT AWARENESS?

There is still an awareness play for Millennials, but we need to change the lens. Every traditional form of advertising and marketing has a digital counterpart.



The Millennial still consumes radio, they just do it digitally. They still consume television, they just stream episodes. They respond to mail, they just expect it electronically. These techniques can reach the Millennial and create awareness. Search and social then complete the journey.

# WHAT APPEALS TO THE MILLENNIAL?

## WHAT ARE MILLENNIALS LOOKING FOR FROM THEIR HEALTHCARE PROVIDER?

### 1. APPS

Millennials will download an app if it adds value. They want to schedule appointments, communicate with a professional and be able to track key health indicators.

### 2. TRANSPARENCY

This generation, more than ever, demands transparent billing and the ability to pay those bills online. Alarming, a TransUnion Healthcare Millennial Report found that 74 percent of Millennial patients did not pay their medical bills in full, compared to 68 percent for Gen X and 60 percent for Baby Boomers. Being able to understand them is of primary concern.

### 3. WEARABLE TECHNOLOGY

Millennials are more apt to have an Apple Watch or Fitbit strapped to their wrist, and the ability to sync health data with a provider is extremely appealing.

### 4. TELEHEALTH

A recent poll conducted by Harris Poll, found that 74 percent of Millennials are interested in utilizing telehealth, of which 63 percent believe they would be provided a better diagnosis.

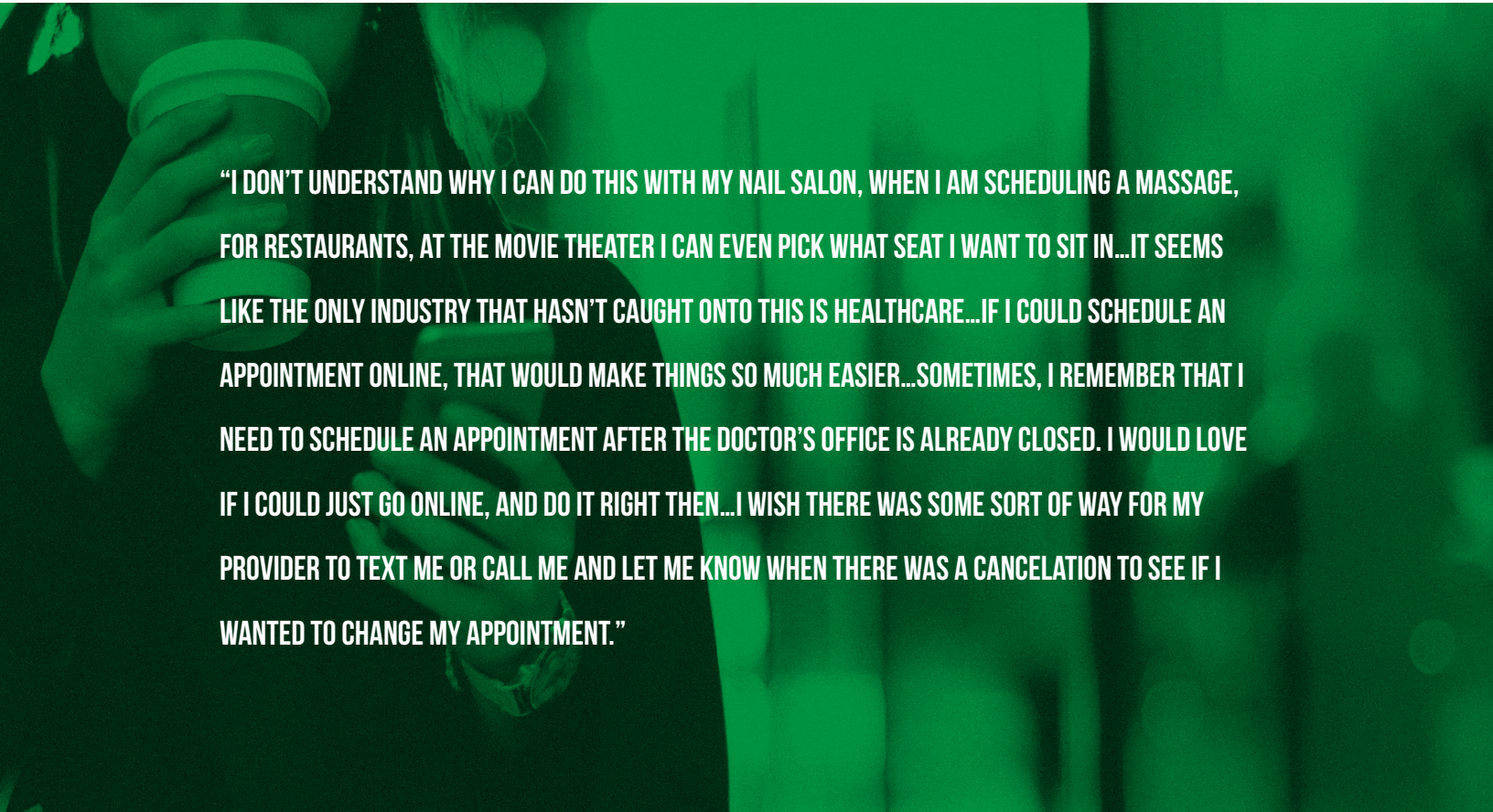
Millennial patient acquisition has forced a monumental paradigm shift in medical advertising and marketing. Millennials value tech, transparency and credibility, none of which they get from flashy ads or marketing jargon. They are the show -not tell- generation that values what their friends say in social spaces and search first when wanting solid medical advice.

In order to reach this segment, provide content that matters more to a generation that cares less about our message and more about our story.

# HEALTHCARE MARKETING + ECOSYSTEM

Millennial patients are not loyal to a particular medical group. Instead, they choose a company based on two factors:

1. Insurance coverage
2. Ease-of-use and the promise of seamless communication
3. Friends and family/Word of Mouth



**“I DON’T UNDERSTAND WHY I CAN DO THIS WITH MY NAIL SALON, WHEN I AM SCHEDULING A MASSAGE, FOR RESTAURANTS, AT THE MOVIE THEATER I CAN EVEN PICK WHAT SEAT I WANT TO SIT IN...IT SEEMS LIKE THE ONLY INDUSTRY THAT HASN’T CAUGHT ONTO THIS IS HEALTHCARE...IF I COULD SCHEDULE AN APPOINTMENT ONLINE, THAT WOULD MAKE THINGS SO MUCH EASIER...SOMETIMES, I REMEMBER THAT I NEED TO SCHEDULE AN APPOINTMENT AFTER THE DOCTOR’S OFFICE IS ALREADY CLOSED. I WOULD LOVE IF I COULD JUST GO ONLINE, AND DO IT RIGHT THEN...I WISH THERE WAS SOME SORT OF WAY FOR MY PROVIDER TO TEXT ME OR CALL ME AND LET ME KNOW WHEN THERE WAS A CANCELATION TO SEE IF I WANTED TO CHANGE MY APPOINTMENT.”**

A Millennial at a local doctor’s office stated her experience with her own healthcare company. She has to call to make an appointment – something she doesn’t have to do with less important tasks, like a nail or hair appointment (though they’re appreciated.) And if she doesn’t remember to make an appointment during the 9-5, she has to wait until the next day.

A study conducted between Salesforce and Harris Poll showed 71 percent of Millennials want to be able to book their appointments through a mobile app. And 74 percent would prefer to see a doctor virtually, finding that leaving work during the day is a burden.

**“MY DENTIST SENDS ME A POSTCARD, CALLS MY HOUSE, SENDS ME AN EMAIL, AND SHOOTS ME A TEXT UNTIL I SCHEDULE AN APPOINTMENT. THEY ARE ON TOP OF MY DENTAL HEALTH, AND THEY MAKE SURE I AM, TOO. AS A RESULT, MY TEETH ARE IMMACULATE. SETTING UP YOUR MARKETING PROGRAMS TO BE PROACTIVE ON BEHALF OF YOUR MEMBERS AND RESPONSIVE TO THEIR NEEDS ACROSS A VARIETY OF CHANNELS ENSURES THAT MILLENNIALS ARE RECEIVING YOUR MESSAGING AND UTILIZING YOUR TOOLS,”**

- Ashley Leon, for IWCO Direct

That is, if she bothers to go to the doctor. According to Ad Age, only 41 percent of Millennials said they view a doctor as the best source of health information, while 30 percent consult blogs and message boards.

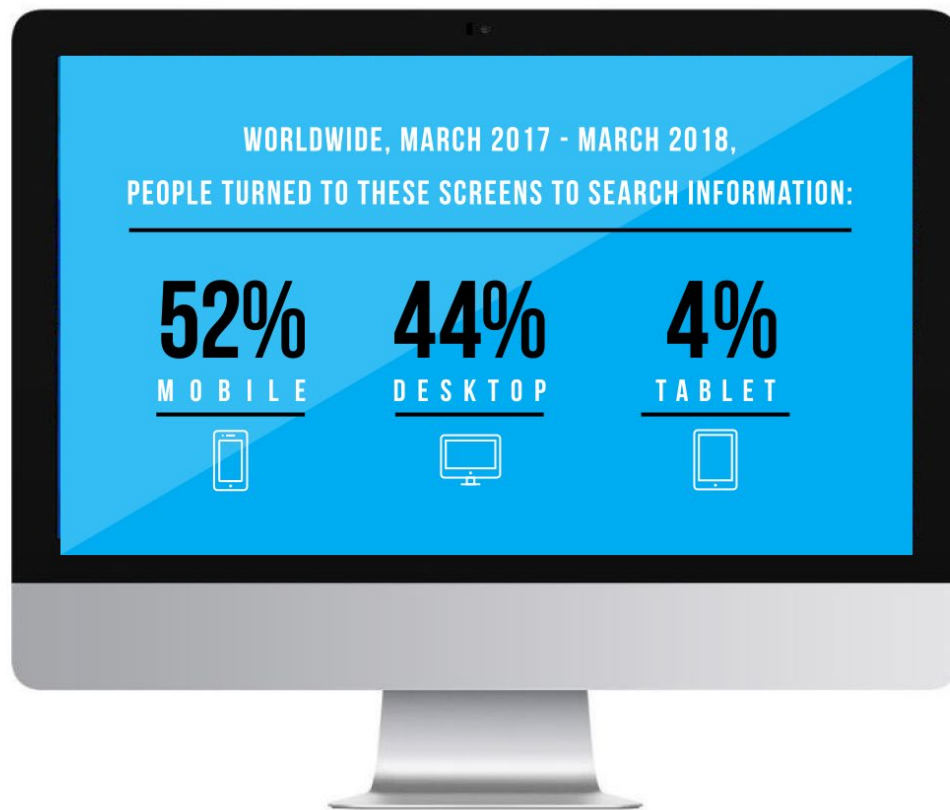
Part of this alternative is to save money. In the same study conducted by MediaPost, 50 percent of Millennials stated they avoid going to the doctor to save money. A PwC study found 19 percent of Millennials asked for a discount on medical care in 2015 - a number that more than doubled from the 8 percent of the rest of the population that asks for a discount.

## WEBSITES

Though a website is an important factor to a healthcare provider, a panel moderated by LEAP Panel showed patients aren't going to a health care sites recreationally. They only visit health organization's sites if he or she needs something.

But the site is a direct reflection of the kind of care a patient expects to receive inside the office. If it the site is a mess, a patient can expect her care inside the office to be chaotic. And if there is no clear CTA, he or she can't expect to find a solution by visiting that facility.

Similarly, consumer's don't connect a website to the nurses, doctors or experts they can expect to consult with inside. Instead, panelists told us they only see the facility and the hospital – a completely impersonal experience.





# HEALTHCARE KPI'S

"As with any business, there needs to be standards by which to measure success. The following are 20 key performance indicators healthcare organizations utilize to measure the effectiveness of their marketing campaign, especially targeted the Millennial demographic.

- |  |  |
|--|--|
| 1. Unique visitors                     | 11. Conversion rates                     |
| 2. Page views                          | 12. Online class/event registrations     |
| 3. Website visitors                    | 13. Enewsletter subscriptions            |
| 4. Click-thru on paid search campaigns | 14. Scheduled appointments               |
| 5. Social media engagement             | 15. Lead generation                      |
| 6. Average time on site                | 16. Online donations                     |
| 7. Followers                           | 17. Bills paid online                    |
| 8. Bounce rate                         | 18. Online ecommerce                     |
| 9. Click-thru rates on email campaigns | 19. Other                                |
| 10. Requests for service, via website  | 20. Don't have KPIs for digital/not sure |

Between 2015 and 2016, only six of these KPIs increased:

1. Click-thru rates on email campaigns (59% - 62%)
2. Enewsletter subscriptions (45% - 51%)
3. Lead generation (35% - 39%)
4. Online donations (28% - 31%)
5. Bills paid online (21% - 22%)
6. Don't have any KPIs for digital/not sure (6% - 10%)

Not many percentages were strong increases, but significant nonetheless. More people have asked to receive email, proving the right kind of design and messaging can lead to engagement. And, with options to transfer money online, more Millennials are willing to donate and handle their bills through a health provider's website.

## CUSTOMER EXPERIENCE

Our own panel proved healthcare referrals are driven by the quality of care and customer service.

Dr. Daniel Spogen, chairman of the University of Nevada Department of Family medicine, said he can tell a difference in Millennials relationship with doctors and older generations relationship with doctors.

His older patients refer to him as “my doctor.” But he does not receive that same ownership from Millennials.

A 2015 report by Salesforce found almost 50 percent of Millennials do not have a personal relationship with their doctors, of which 30 percent of Millennials do not have a doctor, but stated they instead rely on Google as their primary care physician.

# 50%

**OF MILLENNIALS DO NOT HAVE A PERSONAL  
RELATIONSHIP WITH THEIR DOCTORS.**

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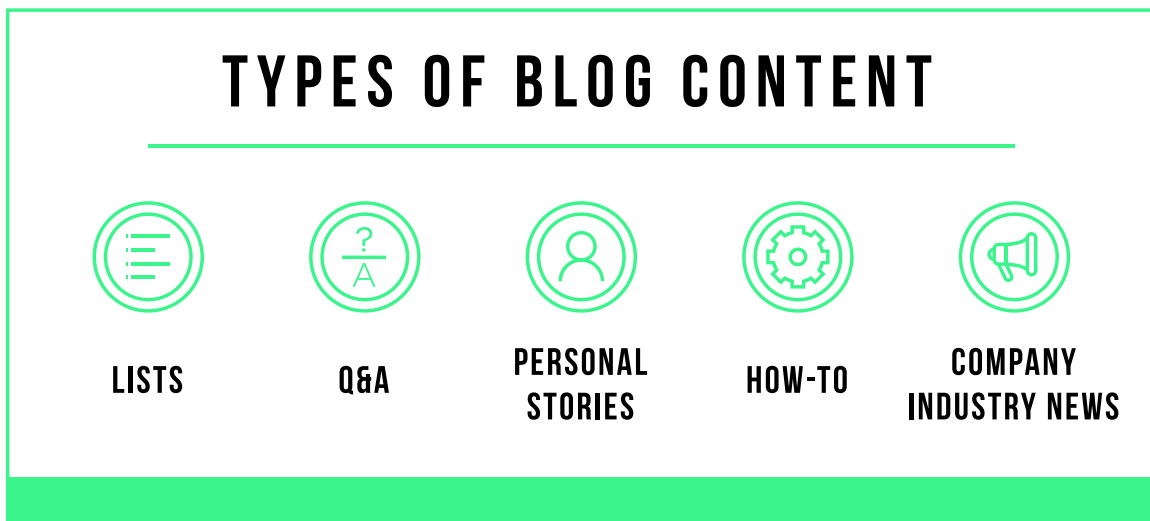
There is a way to create a relationship with Millennial patients, or potential Millennial patients. Once you are in front of where or who they are spending time, it's important a doctor's office – or a website – creates an experience for them.

Consider social media. Taking a brief pause in their day, Millennials turn to social media to experience what they're friends or favorite brands are up to with Instagram stories. They share about their own day with others, using Snapchat's floral crowns and dog AR masks. And, thanks to Facebook's new algorithm, they can confirm Roman drank a Diet Coke again at lunch.

Not to say an Instagram page is the solution for all healthcare providers. But there is a need to find what avenue engages their user.

The Matter More Method allows the healthcare company to understand their Millennial consumer. Based on this information, healthcare organizations can begin to strategize their website, social channels and overall message to Millennial patients.

Content on the site helps with a facility's overall SEO. Continuously updated content not only makes your brand an expert in the field to Millennials, who do check for fresh content, but also allows doctors and nurses to have tangibles to provide a patient after a visit, thus creating even more customer service and personalized attention to the Millennial. A blog post discussing the symptoms and solutions of an issue a patient has made time to inquire about makes them feel like your brand took time to research and provide a piece just for them.



Ultimately, Millennials don't want to be bothered and they want to be cared for. If there is an efficient way to find a solution to their health questions, they will take that route. And they always remember a first impression and if a doctor goes above and beyond normal care, such as a blog or a follow-up call. Tailor your experience – both digital and in-person – and they will remember your brand for the better or for the worse.



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## MILLENNIALS APPRECIATE THE ABILITY TO ACCESS THEIR HEALTH INFORMATION WHEREVER AND WHENEVER...

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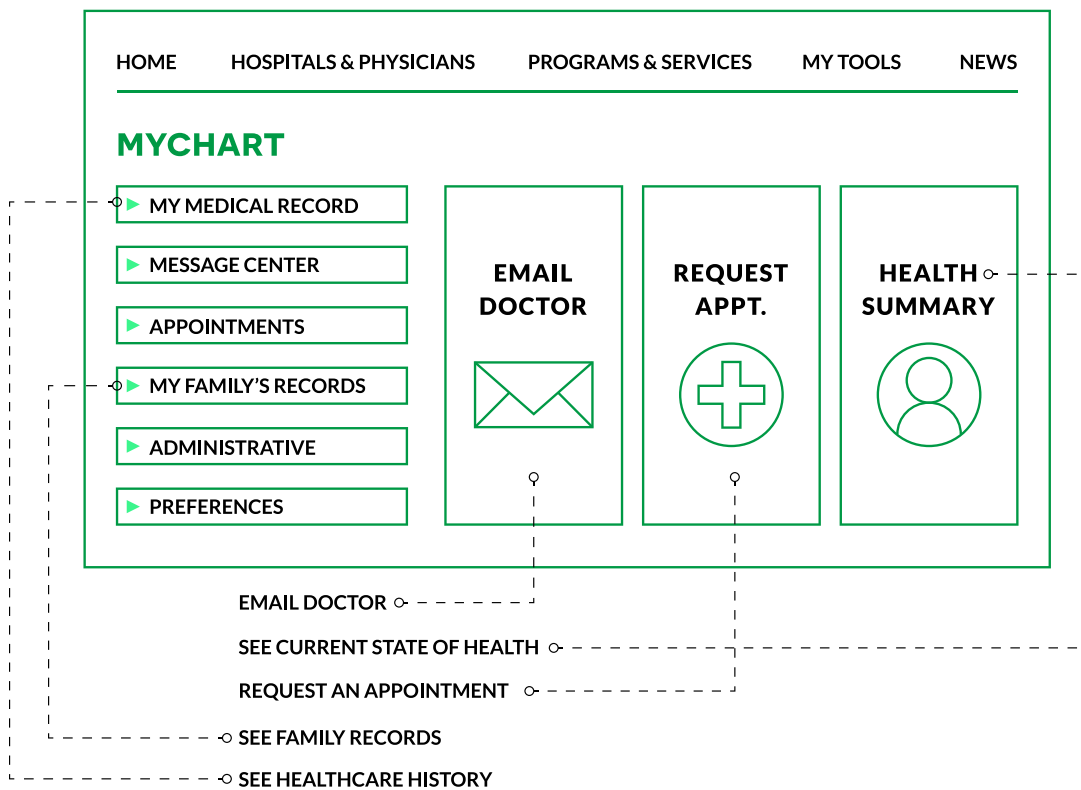


## APPS

Always on-the-go and always multitasking, Millennials appreciate the ability to access their health information wherever and whenever.

MyChart, launched in 2006, is a free mobile app and online portal that allows patients to organize and access all their health information in one place.

For the healthcare industry, MyChart was a game-changer. On top of giving the user access to their own information, they were able to email their doctor to healthcare provider directly through the app, request prescription renewal, ask about symptoms and, most important, it's all free. But it is up to the healthcare company to provide this service to their patients.



In a panel moderated by LEAP Panel, 80 percent of panelists, ages 25-70 use MyChart, and 74 percent of those respondents expected their provider to offer MyChart, or a competitor app.

Anthem Anywhere was the other app mentioned most by our panelists, though it is only provided by the insurance company, meaning it is not an option for Millennials that do not have Anthem Insurance.

Although convenient, apps are not perfect. Our panelists told us their main complaints between Anthem Anywhere and MyChart were the disconnect between healthcare providers – meaning transferring information was not easy – “incessant notifications” and inability to update personal information through the app.

The problem begins with implementation. Research found its easy for healthcare providers to utilize the apps, however it’s a more complicated user experience. Some organizations even opt to close the “schedule an appointment” feature because the user experience is unfriendly. With the right support, however, a healthcare organization should implement full access to these apps in order to better serve their consumers and themselves.

## MARKETING TECH

Mobile applications altered the accessibility of healthcare, however it was not enough. Millennials are engaging with healthcare companies differently on desktops than they are on mobile.

A 2015 study by New Scientist found one in 20 searches on Google are health-related. And over 40 percent of Millennials prefer to Google their questions first, rather than consult a physician. And most were done via mobile.

Millennials are turning to their phone first, not because healthcare companies are lacking in consumer data, but rather missing a way to apply it in a meaningful way. Healthcare companies are missing CRMs and a strategy to release the information they already own.

**THE PROVIDER'S WEBSITE DOES NOT SERVE AS MUCH AS  
A SALES TOOL AS...AN EXTENSION OF THE PROVIDER'S LEVEL OF PROFESSIONALISM AND  
CARE...AND A RESOURCE FOR OBTAINING OBJECTIVE INFORMATION ABOUT [THE] PROVIDER"**

Healthcare companies use CRMs to maintain a relationship between the healthcare provider and the client. It's primary goal is to acquire, engage and retain patients through patient profiles, targeted messaging, automated messages, etc.

CRMs are beneficial to the patient, narrowing in on their specific profiles. Personalized messages and emails, as well as profiles and targeted marketing campaigns, individualizes the customer and personalizes their experience allowing them to feel like they are on their doctor's mind and not just another patient. Millennials strive for this personalization in every digital corner.

There are many CRM options available to healthcare companies. Before choosing which software works best for your company, it's important to ascertain your goals. Determine why you want a CRM. How you will best use it for your brand. Determine a few new goals you'd like to meet with the help of automation. Finally, determine what you want to measure.

Capterra, a leading resource in business software, assembled a list of the top 22 CRM softwares used by healthcare companies in 2017:

- |   |  |  |  |
|---|--|--|--|
| 1    | 7     | 13    | 19  |
| 2    | 8     | 14    | 20  |
| 3    | 9     | 15    | 21  |
| 4    | 10    | 16    | 22  |
| 5  | 11  | 17  |  |
| 6  | 12  | 18  |  |

The report failed to mention healthcare organizations that chose to partner with agencies that not only run their targeted marketing campaigns, but also set up and manage their CRM.

Overall, the healthcare industry saw an 11 percent increase in companies that used CRMs from 2015 to 2016, according to Klein & Partners, now leaving 65 percent of companies with a CRM plan.

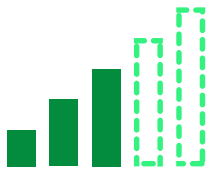
Of those tested, only 13 percent said they have no current plans to integrate a CRM.

# AI TECHNOLOGY

From VR headsets to bottles of wine with packaging that comes to life through a mobile screen, augmented reality technology is taking over media. And Millennials are engaging with the new media more and more. Forbes reported over 1 million VR headsets were sold in 2017. It's no surprise healthcare companies are using this technology not only for the betterment of their patients health, but also to connect with their younger demographic.

Despite what TV shows are depicting, this does not mean doctors are putting on headsets and seeing into a patients body to diagnose them (yet,) but improvements are happening within the industry.

TechEmergence reports the three most common use of AI technology in 2017 were:



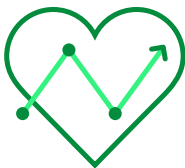
# 1

**PREDICTIVE  
ANALYSIS**



# 2

**CHATBOTS**



# 3

**PREDICTIVE  
HEALTH TRACKERS**



Hospitals are using augmented reality to predict patterns in patients, for instance to foresee when a patient is in danger of a dangerous fall based on his or her behavioral patterns or to understand how patients with a certain diagnosis may react to a certain medicine, compared to other patients with the same analysis.

**\$6.6  
BILLION**

**ACCORDING TO A 2016  
STUDY BY FROST &  
SULLIVAN, AI IN  
HEALTHCARE IS  
PROJECTED TO REACH  
\$6.6 BILLION BY 2021.**

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Chatbots allow patients to connect with doctors or nurses immediately. Millennials have been described as the “instant gratification generation,” so this ability to connect with their healthcare provider whenever is convenient for them, without leaving work or diverging from their routine. Similar to CRMs, before adopting AI technology, the facility must deem it necessary. If they are trying to connect with their younger demographic or determine patterns among nurses or patients, it’s very likely advanced technology could benefit that organization. But, the healthcare organization must determine how and what it will measure before implementing. That way, it can ensure the cost is sustainable.

Adopting this technology within the next couple of years will only keep healthcare companies in line with other organizations. Not embracing AI today will definitely put the industry behind leading competitors that are capitalizing on it to enhance their customer service.

# CMS

Before any campaign, marketing or targeting can begin, users need to have an accessible, aesthetically-pleasing site to land on.

Above aesthetically-pleasing, though, the site has to be functional. And that begins at the back-end. A report by Klein & Partners showed a 149 percent increase in healthcare organizations that used CMS' software vendors from 2015 to 2016.

**According to the report, the top ranking CMS' used to support a website included:**

- |  |  |  |
|--|--|--|
| 1  open source                      | 5 <b>CONVERT</b>   | 9 <b>CommonSpot</b>  |
| 2  sitecore®<br>Own the experience® | 6  VitalSite    | 10  Adobe               |
| 3  SharePoint                     | 7  Sitefinity | 11  Kentico           |
| 4  EPISERVER + ektron             | 8 <b>ORACLE®</b>   | 12  site <i>maker</i> |

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LEAP Agency has a partnership with SiteFinity, is DEC certified through the company, and it is our CMS software of choice. Having built over 100 websites, including healthcare companies, from the platform, we're trusted experts with SiteFinity.

If an outside company, such as an agency, is trusted to build the healthcare provider's site, the brand must be involved in the process to know how to manage the system once the site is live.

About

## LEAP GROUP

### LEAP FRAME

Film, Animation & Design Studio

### LEAP AMP

Amplification & Media Agency

### LEAP SPARK

Growth Impact Agency

### LEAP AGENCY

Full-service Digital Agency

LEAP Group is an independent network of Midwest agencies and studios. With LEAP Group, you have options. We can team up in whatever combination fits your company's needs. LEAP Agency is the full-service digital ad shop. LEAP Amp does just that: amps up the volume of your company without turning up the noise on social. Our LEAP Frame team are the film, motion and graphic storytellers. Finally, LEAP Spark partners with business to create a big impact.

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**WE'VE WORKED WITH COMPANIES IN THE HEALTHCARE INDUSTRIES FROM INSURANCE, TO PROVIDERS TO FINANCIAL COMPANIES.**

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 Kindred  
Healthcare

 UL of Hospital

 HAMILTON COUNTY  
PUBLIC HEALTH

 Cincinnati  
Children's

 CHILDREN'S  
MUSEUM  
INDIANAPOLIS

 NORTON  
HEALTHCARE

 Humana.

To learn more about our experience in healthcare and how we can partner with your organization, get in touch.