MERGE

Innovation in Health Provider Marketing: A Benchmark Study

Healthcare provider marketing leaders across the U.S. shed light on the current state of healthcare marketing innovation for 5 focus areas – Experience maturity, strategic marketing and brand development, technological advancements, data-driven decision-making, and health equity and community engagement.

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The majority of respondents perceive their maturity in early stages across nearly all key focus areas.

Background

As healthcare marketers move from recovery to acceleration mode post-COVID, we are sensing more aggressive transformation and operational integration as well as an expansion of the role of marketing in Health Delivery Organizations (HDOs).
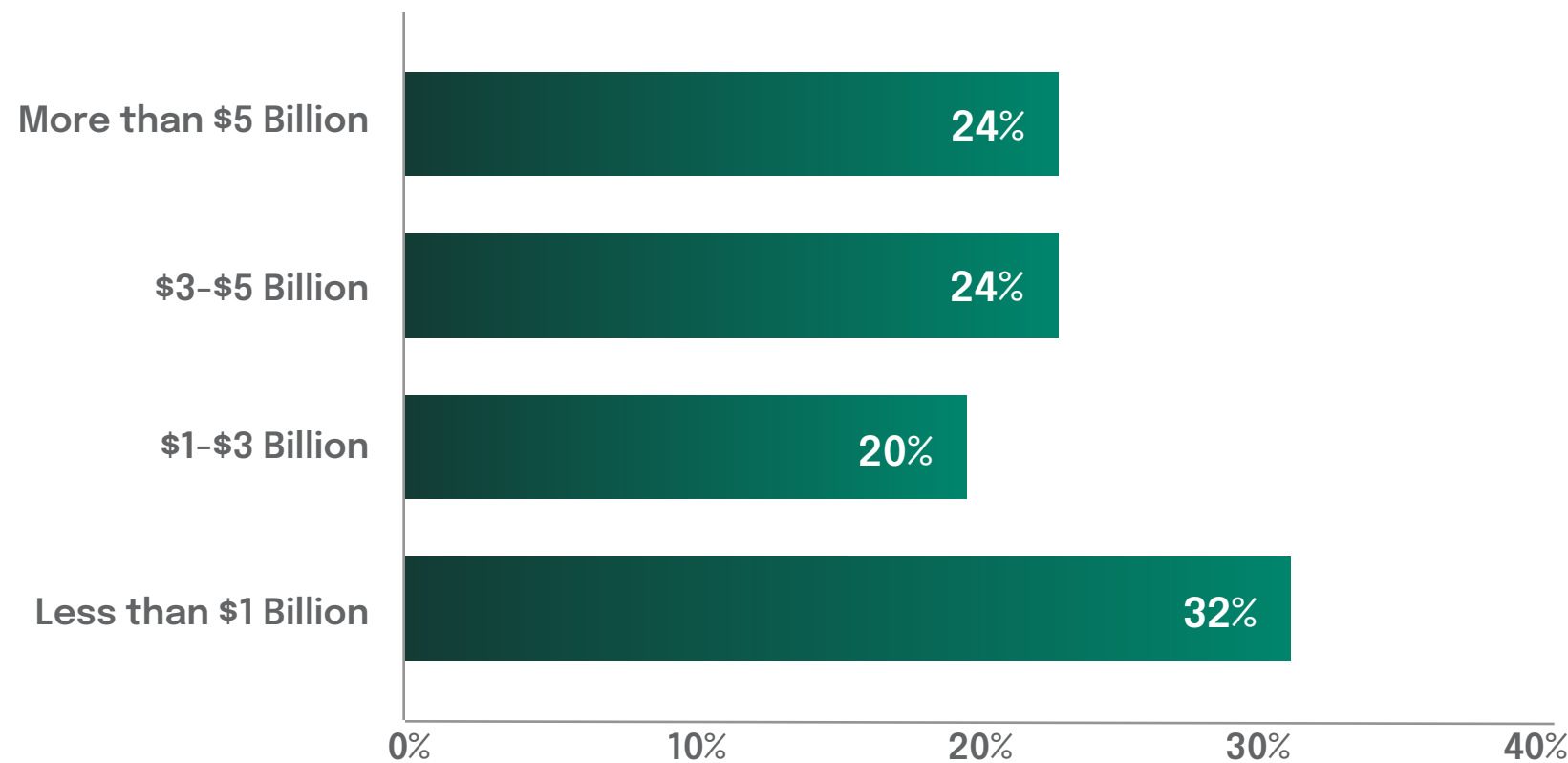
To better understand what HDO marketing innovation maturity looks like today, MERGE and Greystone launched a research effort to gather insights from industry leaders.

Research Methodology

In this survey fielded from June to November 2024, respondents primarily described their organizations as Heath Systems, Academic Medical Centers or Integrated Health Systems, but other types of organizations were represented as well.

Respondents include 75 healthcare provider organizations representing 28 states in the United States. Of the people who answered the questions, 53% of the respondents were director level and higher. 51% of respondents are from organizations with more than 10,000 employees.

Respondent Breakdown by Company Revenue Range (n=59)

Revenue Range	Percentage
More than $5 Billion	24%
$3–$5 Billion	24%
$1–$3 Billion	20%
Less than $1 Billion	32%

Health provider marketing excellence has five key focus areas that formed the basis of this survey.

01

Strategic Marketing and Brand Development:

The creation of distinct brand identities and value propositions in competitive markets, such as specialized services or innovative care models. A focus on omnichannel – integrating all marketing channels for a cohesive, customer-centric brand experience. Emphasizes cross-functional collaboration to align marketing with organizational goals. Includes preparedness for managing communications during crises and emergencies.

02

Health Equity and Community Engagement:

Focuses on addressing social determinants of health through initiatives like patient advocacy programs, flexible payment solutions, and financial assistance awareness. Emphasizes community engagement and local organization partnership that builds trust, drives innovation and addresses public health challenges.

03

Experience Maturity:

Focuses on enhancing patient, employee, and referring provider experiences to improve healthcare outcomes. For patients, it emphasizes superior experiences across all care stages, innovative services, and educational empowerment. For employees, it aligns their experiences with organizational goals through a supportive work environment, professional development, and efficient technological tools. Addresses the needs of referring providers through improved system onboarding, referral processes, and communication.

04

Data-Driven Decision-Making:

Includes establishing centralized systems for customer data and customer segments to tailor marketing strategies. Implementing disciplined processes for defining KPIs and measuring marketing ROI. Additionally, incorporates strong measurement strategy for customer sentiment analysis, performance and applies clinical interventions based on population segmentation insights.

05

Technological Advancements:

Integration of AI, telehealth, personalization, and mobile apps. Technological advancements to help enhance engagement, outcomes, and operational efficiency. Emphasizes developing self-service capabilities as part of the digital experience, catering to the demand for efficient and user-friendly interactions for patients, caregivers, and providers.

About the
Maturity Scale

Respondents were asked to evaluate their organization using the maturity scale provided. They were instructed to omit a question if they did not know the answer or if the question was not relevant to their organization.

Non-existent:

The organization has no process around this.

Initial:

Minimal processes. Actions are often reactive.

Developing:

Steps towards maturity in progress, but is inconsistent.

Defined:

Established processes and consistency.

Optimizing:

Continuously & proactively improving performance.

Summary Results

Strategic marketing and brand development scored the highest proportion of high ratings (4 or 5) while technology adoption scored the lowest. **(Fig. 1)**

Higher revenue didn't always equate to higher maturity. Companies with $1–$3 billon or $3–$5 billion in revenue outperformed those with more than $5 billion in revenue on average in some focus areas. **(Fig. 2)**

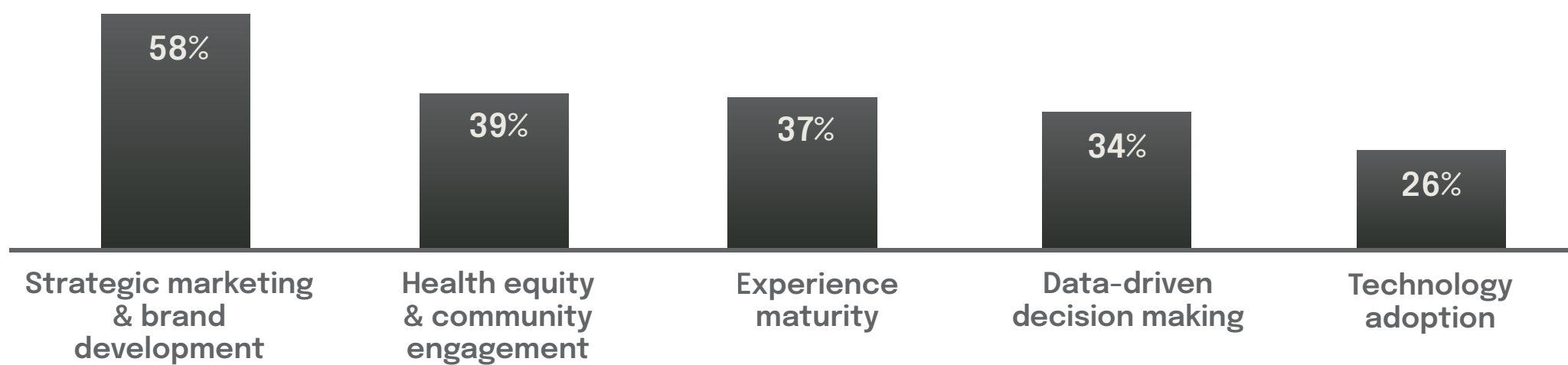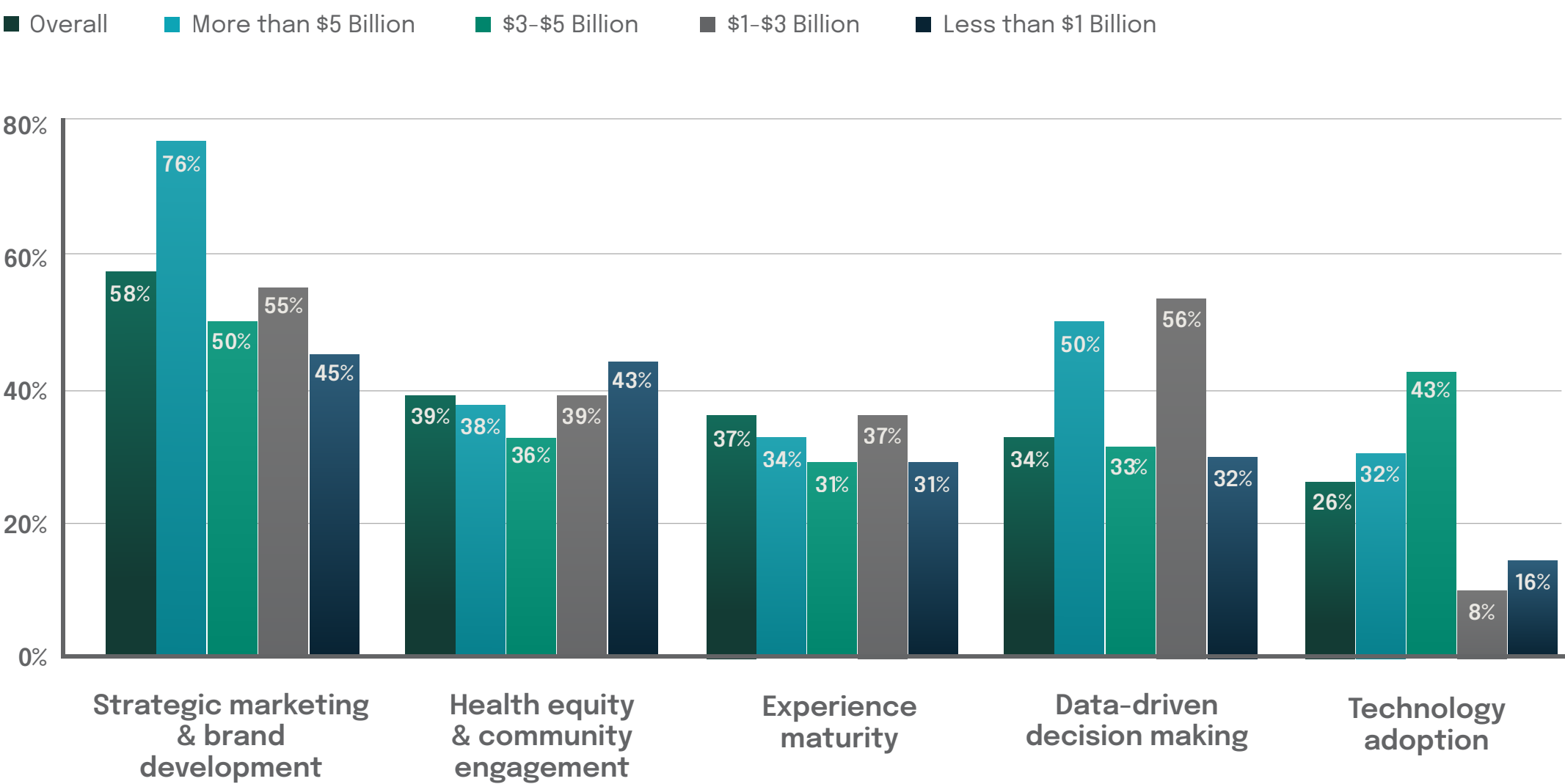**Fig.1 Percentage of High Ratings 4 (Defined) or 5 (Optimizing) per Focus Area**

Strategic marketing & brand development	Health equity & community engagement	Experience maturity	Data-driven decision making	Technology adoption
58%	39%	37%	34%	26%

Fig.2 Performance by Revenue. Percentage of High Ratings (4 or 5) per Focus Area

Legend: ■ Overall ■ More than $5 Billion ■ $3–$5 Billion ■ $1–$3 Billion ■ Less than $1 Billion

Focus Area	Overall	More than $5 Billion	$3–$5 Billion	$1–$3 Billion	Less than $1 Billion
Strategic marketing & brand development	58%	76%	50%	55%	45%
Health equity & community engagement	39%	38%	36%	39%	43%
Experience maturity	37%	34%	31%	37%	31%
Data-driven decision making	34%	50%	33%	56%	32%
Technology adoption	26%	32%	43%	8%	16%

MERGE

01

Strategic Marketing and Brand Development

Key Findings

Organizations scored themselves highest on crisis communication followed by omnichannel marketing approaches.

Many organizations indicated their strength in embodying their brand identity in their patient experience and operations.

Respondents scored themselves furthest behind on internal synergy with other departments and clear KPIs that demonstrate the value of the marketing function.

How Organizations Rate Themselves on Strategic Marketing and Brand Development

■ Non-existent ■ Initial ■ Developing ■ Defined ■ Optimizing

Strategies and protocols for managing communications during crises or emergencies. (n = 72)
| 7% | 19% | 51% | 22% |

A strategic and cohesive omnichannel marketing approach. (n = 72)
| 13% | 24% | 38% | 26% |

A unique brand identity and value proposition embodied in the operational strategy. (n = 72)
| 7% | 35% | 32% | 26% |

Synergy between marketing and other departments to drive organizational goals. (n = 72)
| 1% | 10% | 40% | 32% | 17% |

Clear KPIs that demonstrate the value of the marketing function to the organization. (n = 72)
| 3% | 19% | 35% | 21% | 22% |
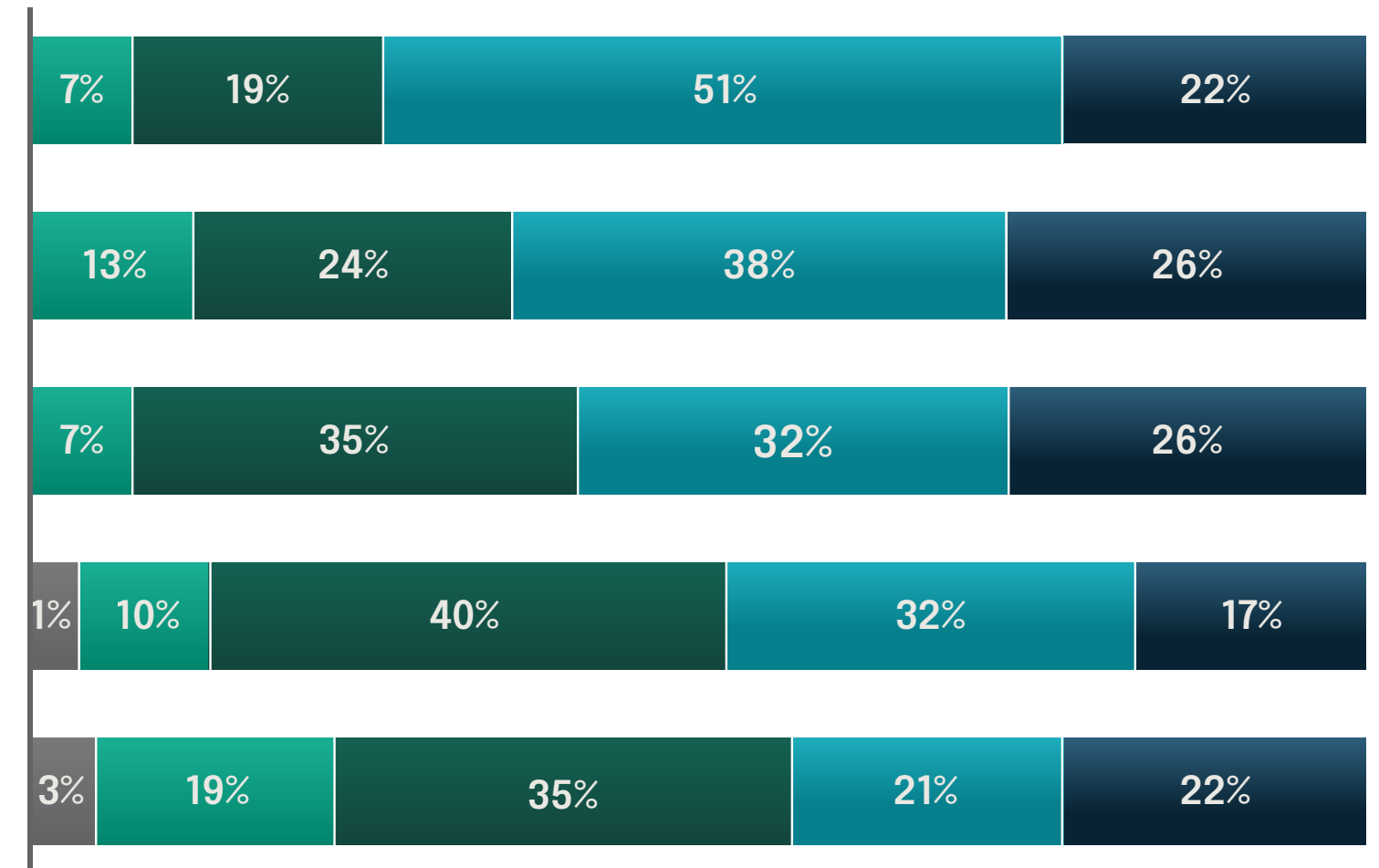
Percentage of Organizations Scoring High Maturity Scores by Revenue

HDOs with a revenue of $5 billion unsurprisingly scored a higher percentage of high maturity scores (4 and 5). However, HDOs with a revenue of $1–3 billion outperformed those with a revenue of $3–5 billion.

	Overall	More than $5 Billion	$3–$5 Billion	$1–$3 Billion	Less than $1 Billion
	58%	76%	50%	55%	45%

01
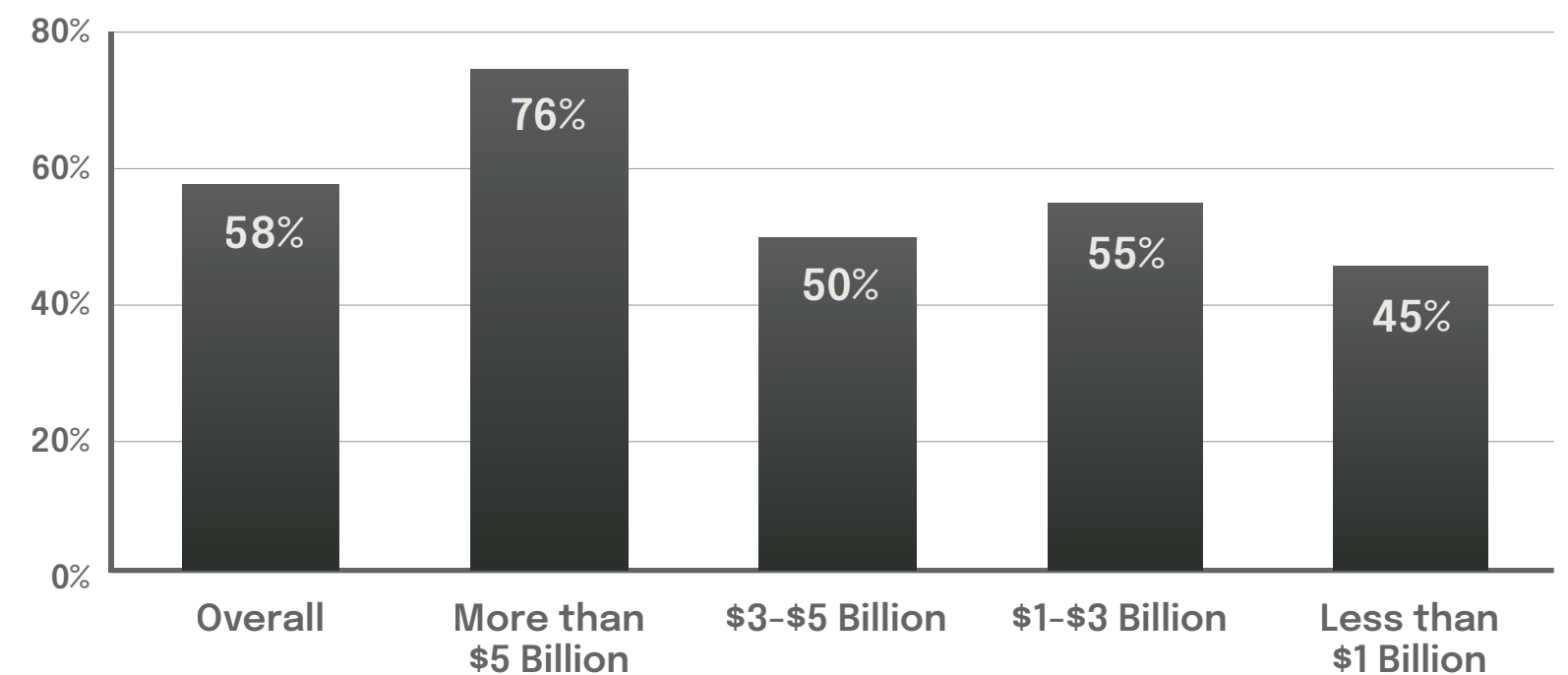
Strategic Marketing and Brand Development

MERGE Perspective

Organizations gave themselves high maturity ratings on omnichannel strategies. However, we believe that while HDOs are acting effectively on cross-channel strategies, they are significantly behind on omnichannel strategies. Omnichannel approaches offer a seamless customer experience across all channels by sharing data and context. Cross-channel approaches may also interact but lack the same level of integration and consistency.

Some organizations continue to view marketing solely as traditional advertising but many are increasingly recognizing marketing teams as strategic partners. Marketing teams have also been taking more ownership on the patient experience, aligning it with the brand promise.

Align departments through shared goals and transparent communication; define meaningful KPIs tied to organizational outcomes; and regularly showcase marketing's impact through success stories.

02

Health Equity and Community Engagement

Key Findings

Organizations are ahead in building partnerships with community organizations; however, they rate themselves lower in effectively raising awareness about their partnership and initiatives addressing social determinants of health in their footprint.

How Organizations Rate Themselves on Health Equity and Community Engagement

■ Non-existent   ■ Initial   ■ Developing   ■ Defined   ■ Optimizing

Partnerships with community organizations to drive innovation, address public health challenges, extend services, or enhance patient care. (n = 68)

| 4% | 12% | 35% | 31% | 18% |

Driving awareness of your organizations's commitment to address social determinants of health that most impact patients in their footprint. (n = 68)

| 7% | 25% | 32% | 24% | 12% |

Initiatives to connect to the local community including ensuring clear, transparent, and timely communication to foster trust and credibility. (n = 67)

| 4% | 4% | 46% | 22% | 12% |

Percentage of Organizations Scoring High Maturity Scores (4 or 5) by Revenue

Smaller HDOs scored a higher percentage of high maturity scores (4 and 5), potentially due to their brand and mission being more deeply rooted in the local community.

Overall	More than $5 Billion	$3-$5 Billion	$1-$3 Billion	Less than $1 Billion
39%	38%	36%	39%	43%

02
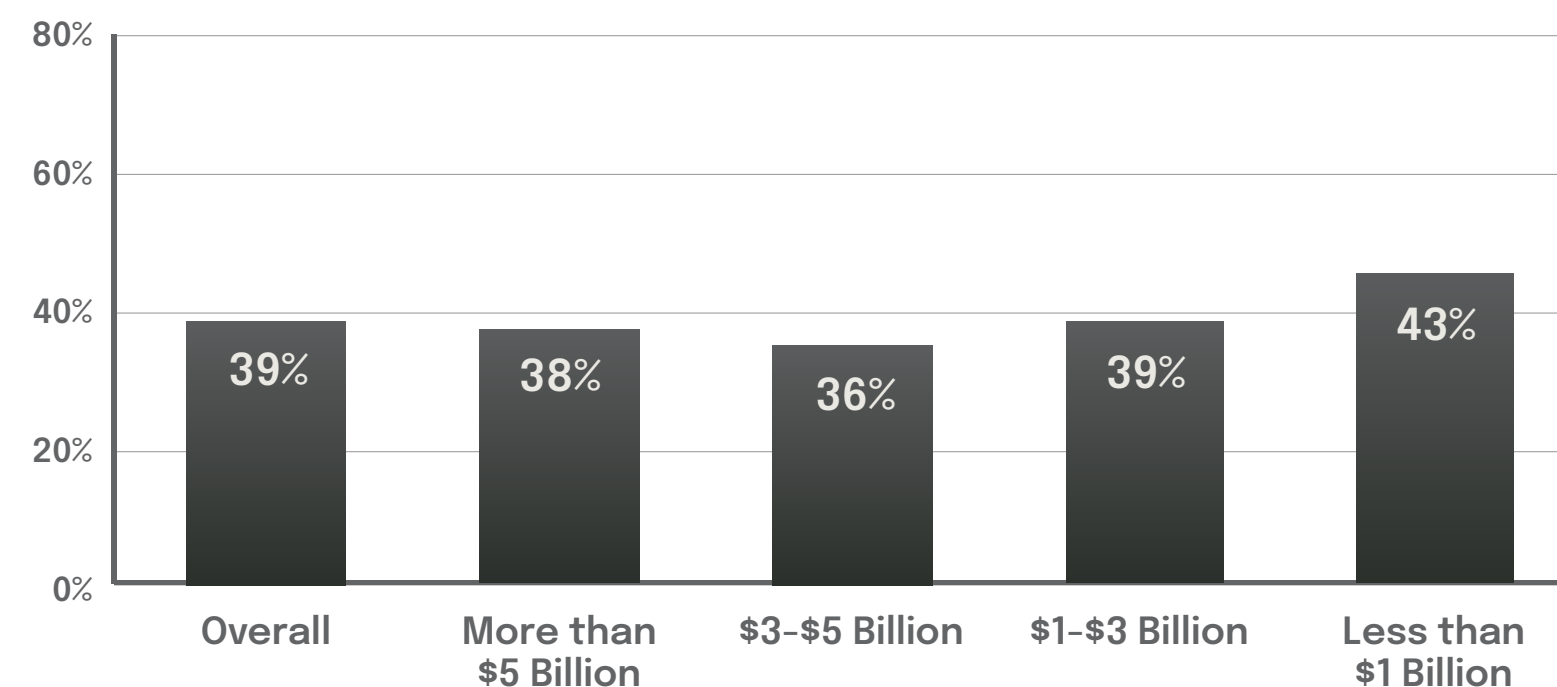
Health Equity and Community Engagement

MERGE Perspective

Many HDOs are missing the mark on effectively leveraging their community activities to bolster their brand. It's imperative to clearly communicate your organization's impact on social determinants of health through compelling storytelling and strategic collaboration with trusted community partners.

Larger HDOs, with a more expansive reach, may find it challenging to fully grasp the nuances of each community it serves. We are observing that some large HDOs are attempting to change this and return their brand to a community focus.

03

Experience Maturity

Key Findings

Organizations have comparatively more defined processes and strategies when it comes to providing positive employee experiences.

Most respondents rated their performance on patient communication, service quality, and patient education in the developing stage.

Organizations are most lagging in maturity to support referring providers throughout their journey.

How Organizations Rate Themselves on Experience Maturity

■ Non-existent   ■ Initial   ■ Developing   ■ Defined   ■ Optimizing

A positive employee experience due to the work environment, alignment with brand promise, and professional development opportunities. (n = 75)
| 1% | 12% | 37% | 32% | 17% |

A positive employee experience based on the presence of technologies that facilitate efficiency and enable the staff to focus on patient outcomes. (n = 75)
| 5% | 16% | 36% | 26% | 16% |
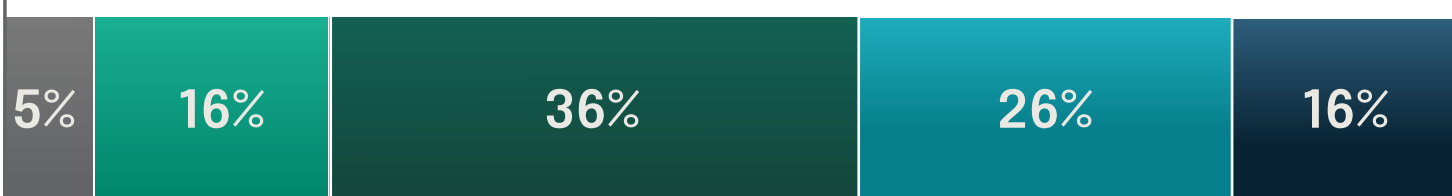
A positive patient experience that delivers the right communication along the pre-, during-, and post-care continuum at the right time and the right medium. (n = 75)
| 17% | 45% | 19% | 19% |

A positive patient experience because we focus on educating patients about their health, treatments, and empower them to navigate their healthcare decisions. (n = 74)
| 1% | 15% | 47% | 24% | 12% |

A positive patient and caregiver service experience at every touch point including the waiting room, check in/check out, call center, concierge care, patient advocacy etc. (n = 75)
| 3% | 24% | 37% | 24% | 12% |
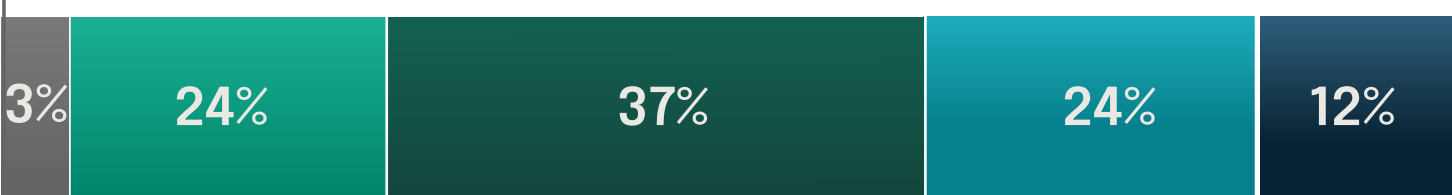
A positive experience for referring providers throughout their journey. (A referring provider refers patients into your organization). (n = 74)
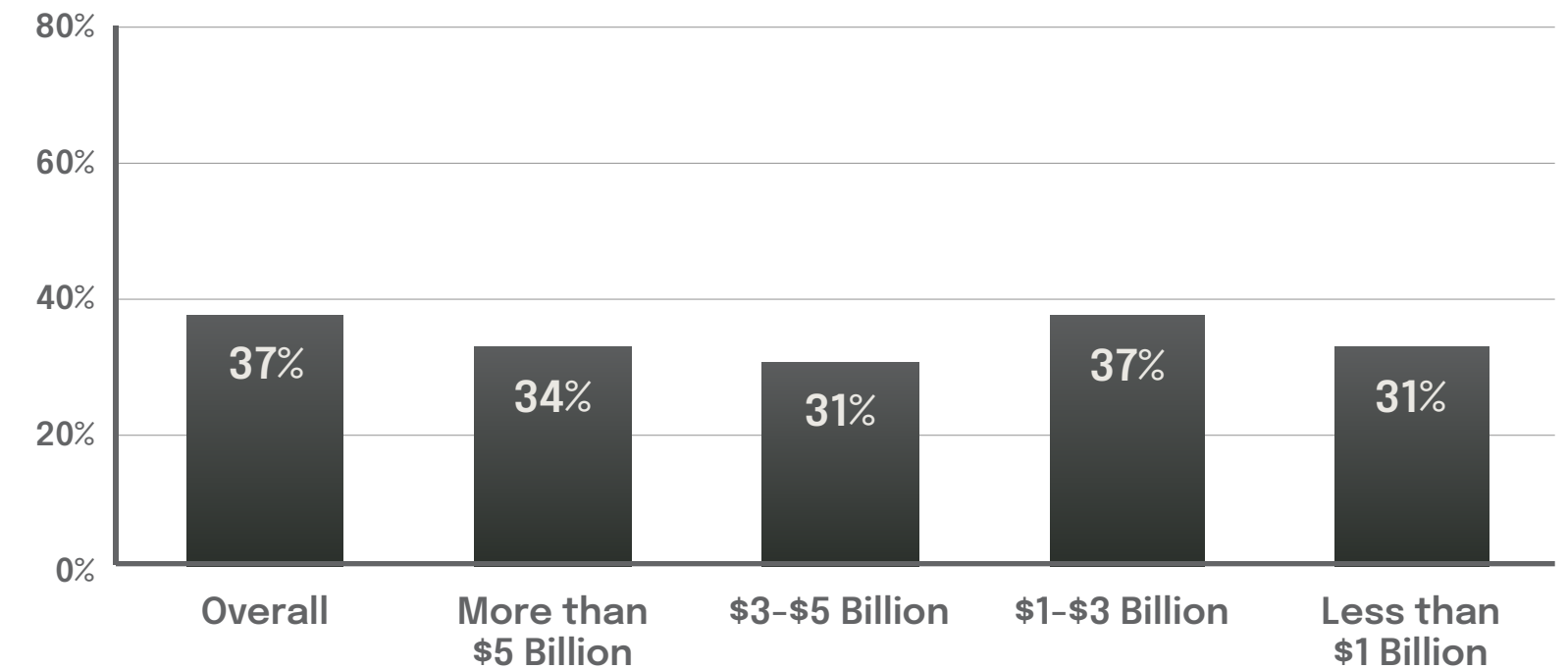| 3% | 23% | 47% | 22% | 5% |

03
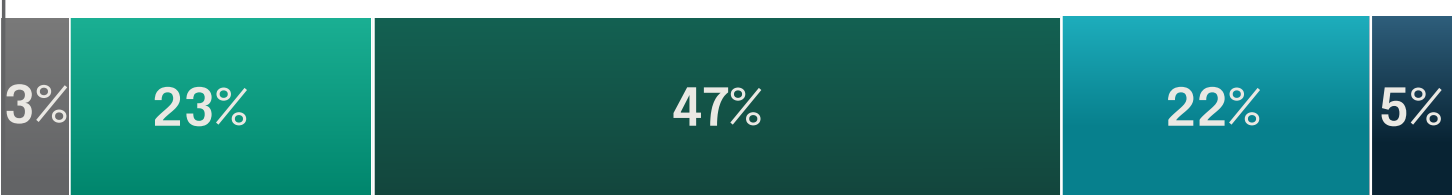
Experience Maturity

Percentage of Organizations Scoring High Maturity Scores (4 or 5) by Revenue

Organizations with annual revenue of $1-3 billion appear to be surpassing larger organizations in the area of experience maturity, likely due to being more nimble and willing to adopt new technology.

Bar chart: Overall 37%, More than $5 Billion 34%, $3-$5 Billion 31%, $1-$3 Billion 37%, Less than $1 Billion 31%

MERGE Perspective

While there has been an increase in this maturity since the last survey two years ago, HDO maturity is not advancing as quickly as customer expectations – often driven by exceptional experiences outside the healthcare industry.

A significant opportunity arises for health delivery organizations (HDOs) to stand out by prioritizing clear, compassionate communication, intuitive self-service, seamless service delivery, and comprehensive patient education.

Streamline the referral process with user-friendly tools. Build strong relationships through networking, education, and recognition programs. Leverage data to target high-value providers, and highlight success stories in marketing messaging.

Large organizations must overcome bureaucratic processes and move quickly to provide a meaningful difference and improve customer experience.

04

Data-Driven Decision Making

Key Findings

Respondents report relatively more advanced maturity in tools for sentiment analysis and customer segmentation that allows for appropriate messaging.
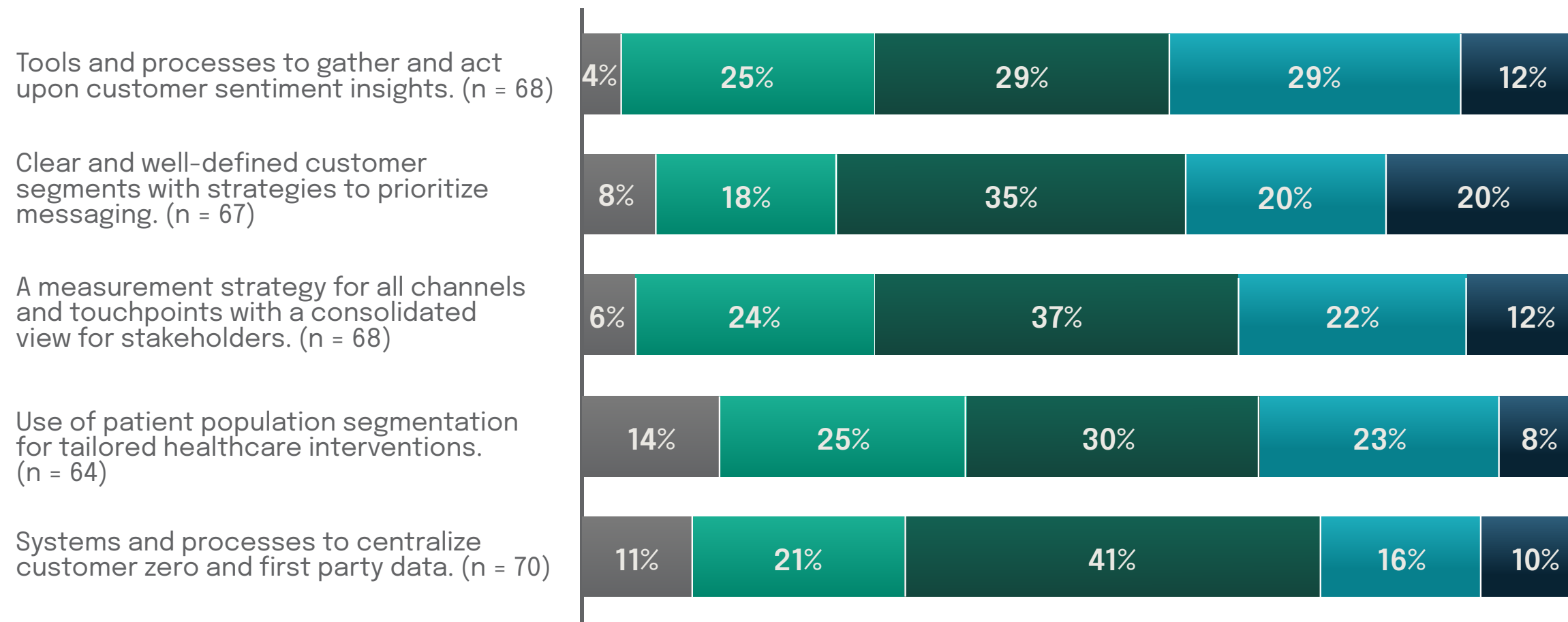
Many organizations are in the developing phase for measurement strategies for their various channels and empowering stakeholders to use them for business decisions.

Many are lagging in tailored healthcare interventions for their patient populations.

Respondents are in the midst of acting on centralized zero and first party customer data.

How Organizations Rate Themselves on Data-Driven Decision Making

■ Non-existent ■ Initial ■ Developing ■ Defined ■ Optimizing

	Non-existent	Initial	Developing	Defined	Optimizing
Tools and processes to gather and act upon customer sentiment insights. (n = 68)	4%	25%	29%	29%	12%
Clear and well-defined customer segments with strategies to prioritize messaging. (n = 67)	8%	18%	35%	20%	20%
A measurement strategy for all channels and touchpoints with a consolidated view for stakeholders. (n = 68)	6%	24%	37%	22%	12%
Use of patient population segmentation for tailored healthcare interventions. (n = 64)	14%	25%	30%	23%	8%
Systems and processes to centralize customer zero and first party data. (n = 70)	11%	21%	41%	16%	10%

Percentage of Organizations Scoring High Maturity Scores (4 or 5) by Revenue

HDOs with revenues of $1-3 billion scored a higher percentage of high maturity scores (4 and 5) than others, likely because they can adopt new processes and achieve internal alignment more quickly. Surprisingly, HDOs with revenue of $3-5 billion and those less than $1 billion scored similarly.

Revenue	Percentage
Overall	34%
More than $5 Billion	49%
$3-$5 Billion	33%
$1-$3 Billion	56%
Less than $1 Billion	32%

04
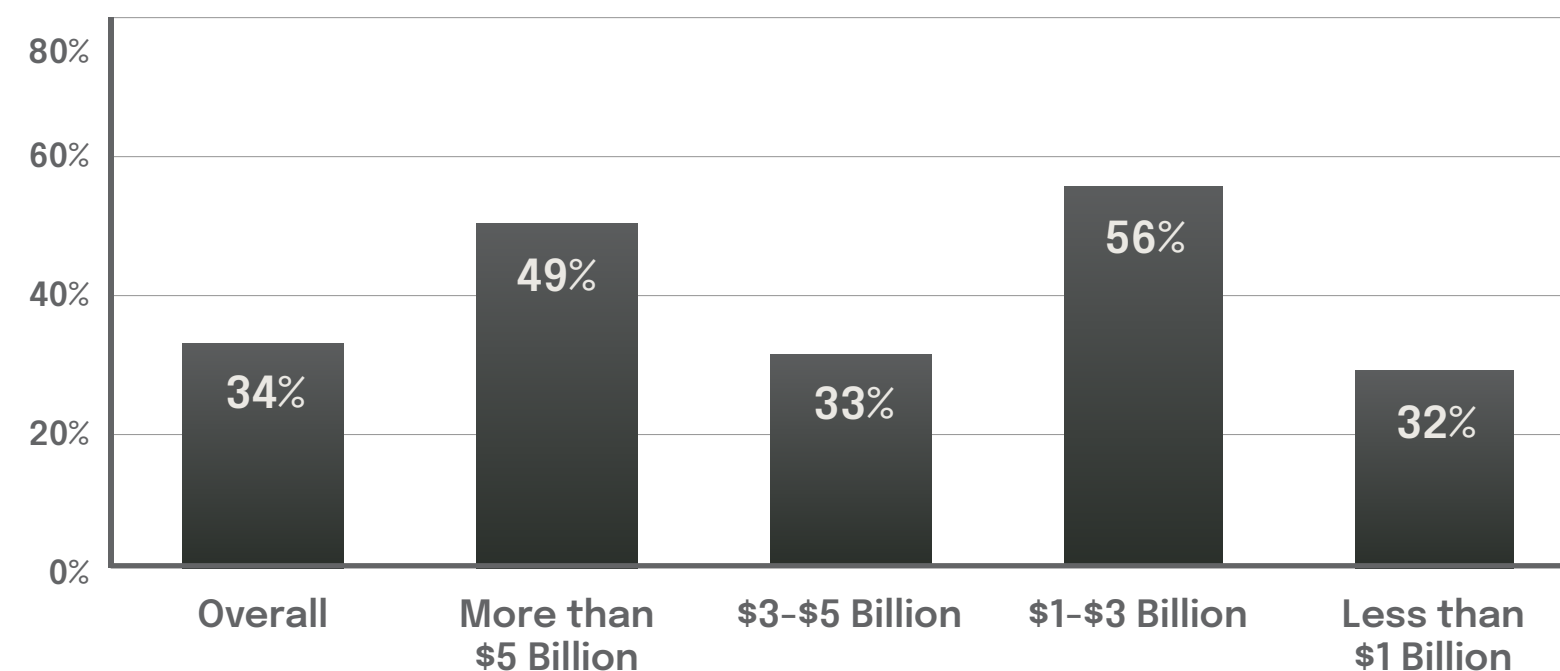
Data-Driven
Decision Making

MERGE Perspective

While HDOs are proficient in gathering feedback, many struggle to utilize the gathered data for business decisions. This is frequently due to an internal, insular decision-making culture or a lack of qualitative data that would further explain the "why" behind the sentiment.

Broad availability of custom-built dashboards can ensure that stakeholders have access to relevant data and can facilitate informed decision-making.

Many HDOs are acting now to centralize customer data and expand zero and first party data collection to provide meaningful value to customers. (Zero-party data is information that a customer intentionally and proactively shares with a business. This differs from first-party data – gathered through interactions and observations). While zero-party data offers significant benefits, healthcare providers must handle it ethically and responsibly.

Some organizations are struggling with the sheer volume of the data and lack a strategy and tools to effectively utilize it. This is where AI systems can help as they excel at recognizing patterns in massive datasets, uncovering trends, and delivering insights. When applied to zero and first-party data, AI can transform how organizations craft experiences and connect with their audiences.

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05

Technological Adoption

Key Findings

The majority of respondents are at the developing stage with respect to technological adoption.

Respondents were slightly lagging in technological adoption for customer engagement touchpoints in comparison to technology innovation adoption to streamline internal operations.

How Organizations Rate Themselves on Technological Adoption

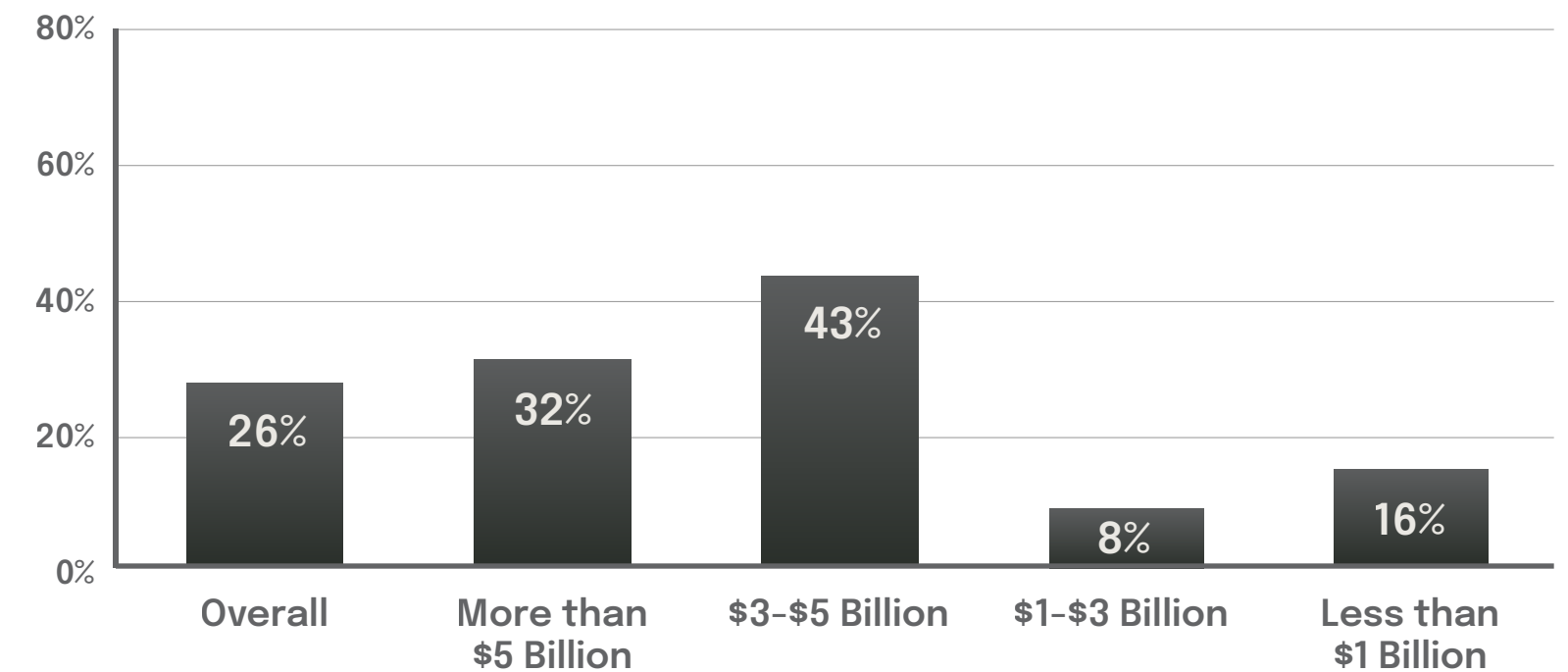■ Non-existent ■ Initial ■ Developing ■ Defined ■ Optimizing

Digital technologies and strategies to streamline marketing and clinical operations. (n = 72)

| 3% | 19% | 51% | 14% | 13% |

Digital technologies and strategies to enhance customer engagement and self-service. (n = 72)
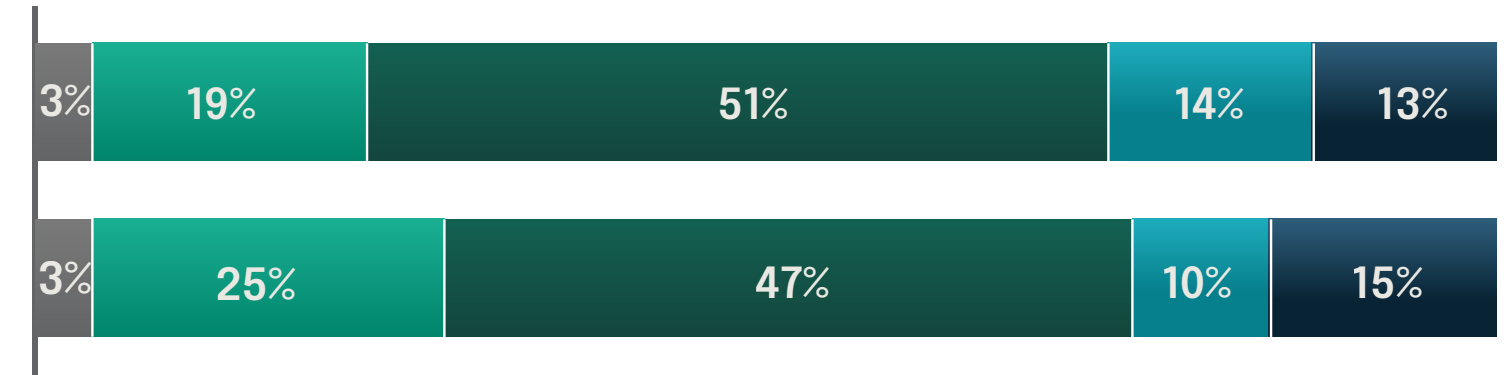
| 3% | 25% | 47% | 10% | 15% |

Percentage of Organizations Scoring High Maturity Scores (4 or 5) by Revenue

HDOs with a revenues of $3–$5 billion scored higher percentage of high maturity scores 4 and 5 in relation to others. $1–$3 billion HDOs seemed to be much further behind.

Overall	More than $5 Billion	$3–$5 Billion	$1–$3 Billion	Less than $1 Billion
26%	32%	43%	8%	16%

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05

Technological Adoption

MERGE Perspective

The drive to invest in customer-facing technology has grown considerably recently. However, before making any investments, we suggest conducting a thorough analysis of patient expectations to facilitate investment in appropriate technologies.

Implement user-friendly tools like patient portals, chatbots, and mobile apps to empower customers to manage appointments, access records, and get answers to common questions. Simplify workflows for self-service options, ensuring they are intuitive and accessible across devices, while educating patients on how to use them.

Strategic marketing teams are realizing that technology alone cannot resolve organizational challenges. True effectiveness begins with a solid strategy, bolstered by skilled personnel and clearly defined processes, before integrating technology platforms. This approach has led to the consolidation of tech stacks and a greater focus on utilizing resources efficiently. As a result, the role of full-time employees (FTEs) in executing and operationalizing strategies has become increasingly critical to delivering impactful outcomes.

Your next move toward marketing innovation

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MERGE is a purpose-driven, full-service marketing and technology solutions company designed to promote health, wellness and happiness. MERGE fuses their complementary health and consumer vertical expertise to create a deep, unique understanding of how consumers make decisions about their health and wellness journeys. MERGE's success is best illustrated in its enduring client partnerships with marquee brands such as Abbott, Blue Cross Blue Shield, GE Healthcare, Geisinger, VCU Health, IU Health, Supernus, American Express, T-Mobile, Coach, and Meta. With a team of 750+ employees across offices in Atlanta, Boston, Chicago, Denver, Kansas City, Los Angeles, and New York City, MERGE's culture embraces agility, ability, and humility to consistently deliver exceptional client results.

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