

# PATIENT INSIGHTS UNVEILED:

**Exploring patient care shopping habits and the impact  
of social media, thought leadership, and advertising**

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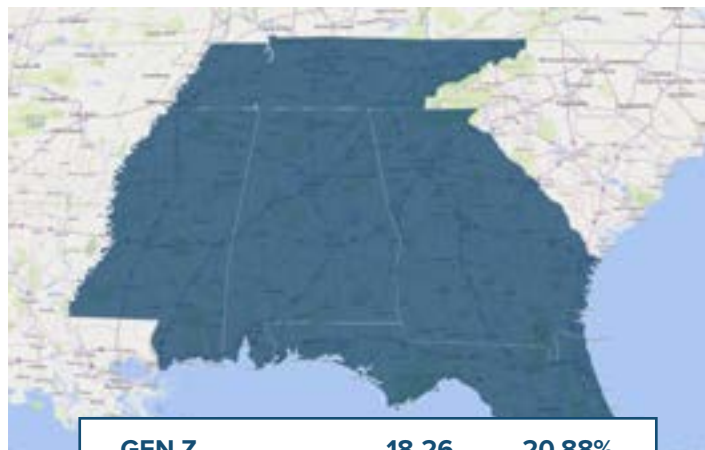
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# SURVEY RESPONDENTS

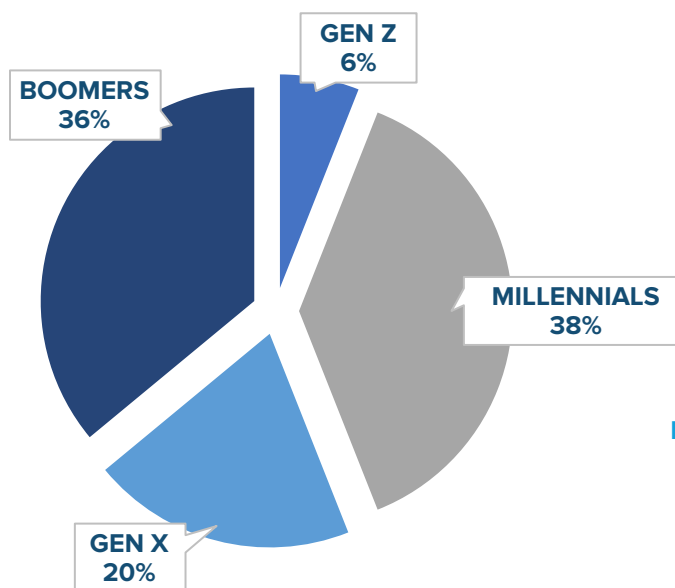
In May 2023, Advance Healthcare Marketing launched a survey asking southeastern patients several questions about their healthcare such as selecting primary and specialist care and how they interact with practice advertising, websites, and appointment-setting channels (both human and electronic). Because we also asked their age, we were able to segment the responses by generation (as of May 2023). We also focus on responses in the southeast reflecting the customs and preferences of patients in this area.

What we found was illuminating and useful for practice marketers of all sizes. Reading this report, practice owners, managers, and marketers will discover each generation has unique needs, habits, and methods for researching health information, booking appointments, and ultimately finding physicians. Patient acquisition and retention isn't a one-size-fits-all endeavor. Marketers, doctors, and managers need to know how each generation approaches key healthcare moments: researching conditions, seeking advice, and deciding on a practice.

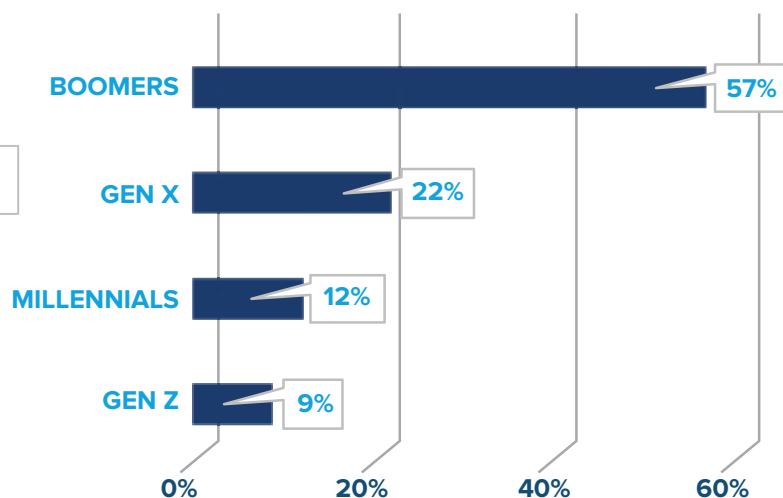
As you read this report, think about your practice's marketing and public-facing assets: website, social media channels, and messaging. Do you speak to each generation in their language? Are you relatable and authentic to different age groups and family make-ups? Or do you have a one-size-fits-all strategy?



<b>GEN Z</b>	<b>18-26</b>	<b>20.88%</b>
<b>MILLENNIALS</b>	<b>27-42</b>	<b>21.67%</b>
<b>GEN X</b>	<b>43-58</b>	<b>19.61%</b>
<b>BOOMERS</b>	<b>59+</b>	<b>20.58%</b>



## US HEALTHCARE SPENDING SHARE



# MEDIA CONSUMPTION BY GENERATION

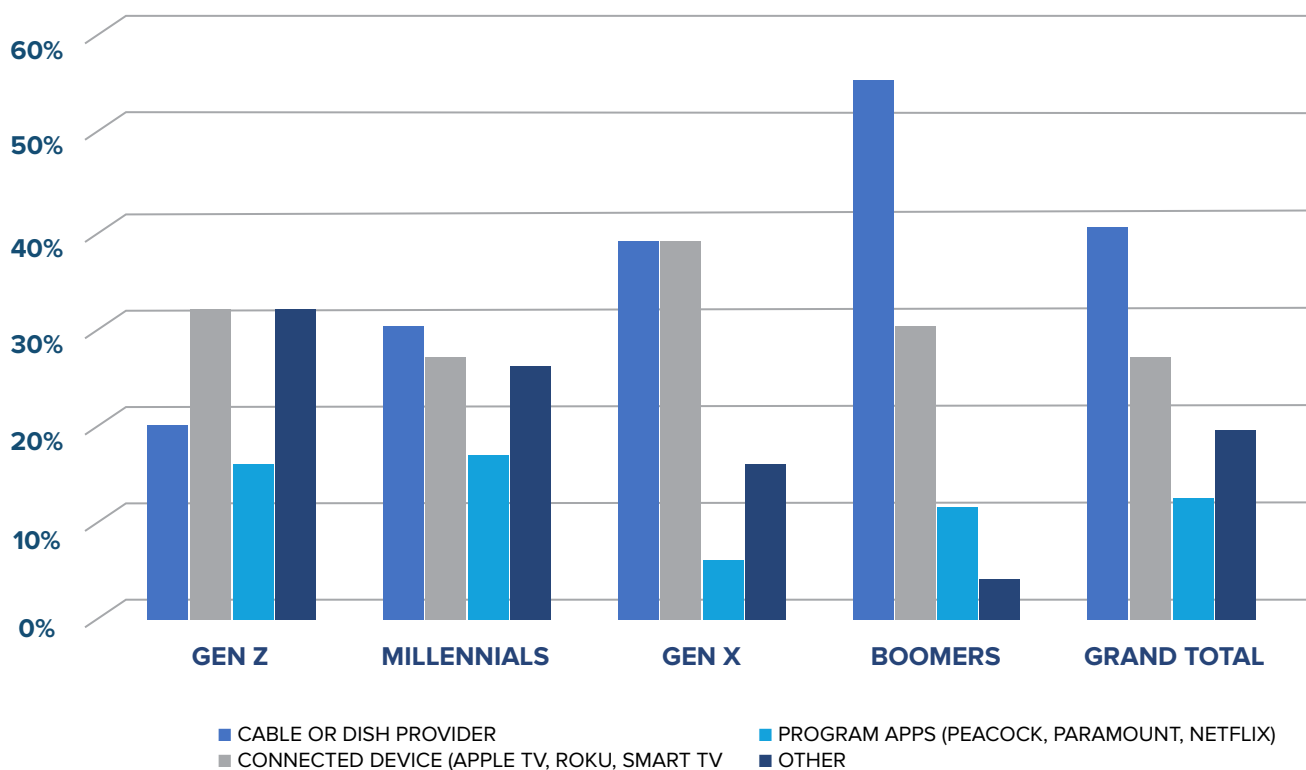
## Patients of all generations have shifted to non-linear TV.

The first thing marketers need to know is where their patients are spending their time. The bottom line – it's not traditional TV, not anymore. While Gen-Z and Millennials left traditional TV viewing years ago (or never started), more than 60% of GenXers have joined the ranks of the cord-cutters. Even though a majority of Boomers still like the cable and dish, 45% of them have left it behind for Roku or streaming apps exclusively. So, if traditional linear TV or cable advertising is a big part of your marketing mix, you're missing a huge segment of every generation – not just the youngest.

**60%** of all respondents have unplugged from cable/dish

Boomers are the only group with more than 50% viewership of cable/dish

## TV VIEWERSHIP METHODS OF RESPONDENTS



# SOCIAL MEDIA USAGE BY GENERATION

It's not about which social media platform they use, but it's about what mix apps they use the most. The graphs to the right show how each generation ranked the most popular 6 social media apps. We asked which ones they use the most – ranked from 1-6.

Every generation had more people ranking Facebook as the most used #1 app, but all of them demonstrated a mix ranking Instagram, TikTok, and YouTube in the 2th, 3rd, and 4th spots. What this means for marketers is that getting the patients' attention means speaking to them directly on the social media channel most engaging to them. It also means that you can't just rely on one kind of post to get their attention.

Even though YouTube and TikTok are exclusively video platforms, Facebook and Instagram have gone video-heavy with Reels and feed content filled with video. We've seen Meta putting a preference on Stories and Reels which reiterates the need for vertical video. We have seen the performance of Meta campaigns increase when these ad sizes are utilized.

Static posts still work, but marketers have to produce content to fit the app's sizes and styles. Consider various ways to convey information when creating feed posts, Reels, Stories, and Shorts – subtitled graphic styles and video length could vary by platform too.

## SOCIAL PLATFORMS IN ORDER OF USAGE

### GEN Z



### MILLENNIALS



### GEN X



### BOOMERS



**Meta places a preference on Stories and Reels, reiterating the need for vertical video**

**Performance of Meta campaigns increases when these ad sizes are utilized**

# PATIENT APPOINTMENTS BY GENERATION

Patients aren't just making decisions for themselves. While this may be obvious to families with kids of all ages, we should keep in mind who the target of our advertising is. For example: as parents grow older, adult children begin to manage the care of their parents, or at least consult with them when seeing care for conditions treated by specialists. Thus, the targeted segment(s) is not only the elderly parents but their adult children as well.

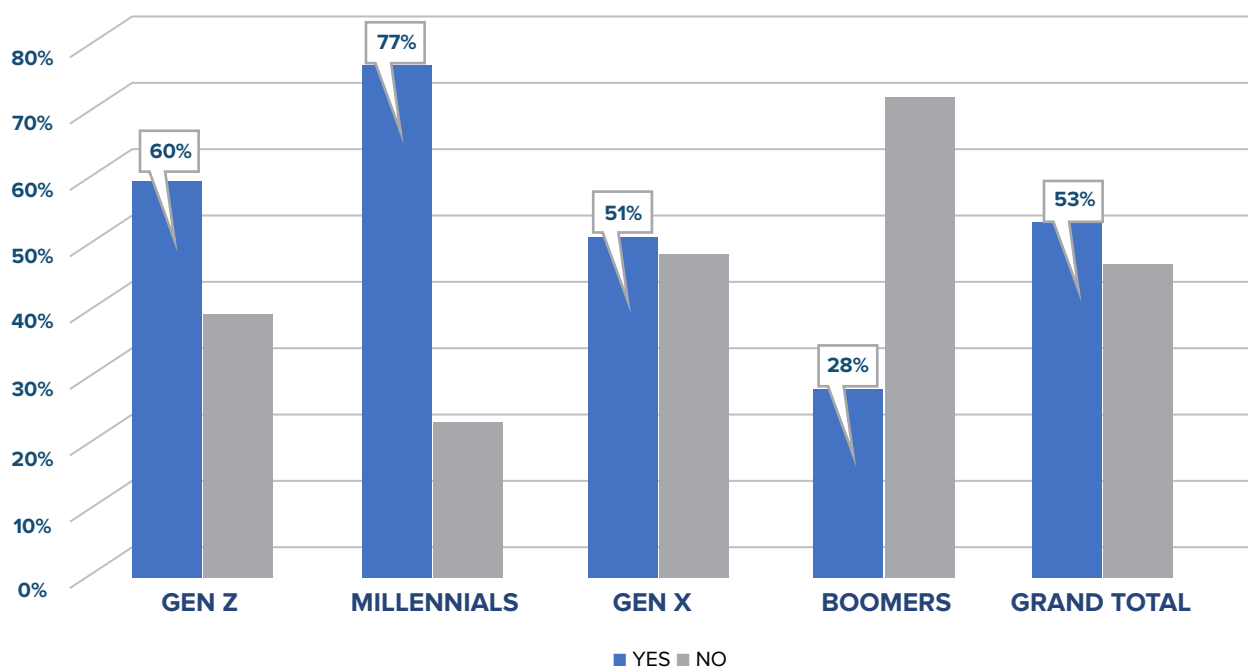
Spouses can help research primary and/or specialty care for their partner.

**Bottom line** – even though we all think of GenZ as super young, the oldest is 26 (as of this writing) and seeking out pediatricians, dentists, and care for injuries and chronic illnesses. To reach them (as well as Millennials and GenX), your advertising must hit them where they put their eyeballs online.

**50% of all patients book appointments for others**

**77% of Millennials shop for care for others**

## DO YOU BOOK APPOINTMENTS FOR OTHERS?



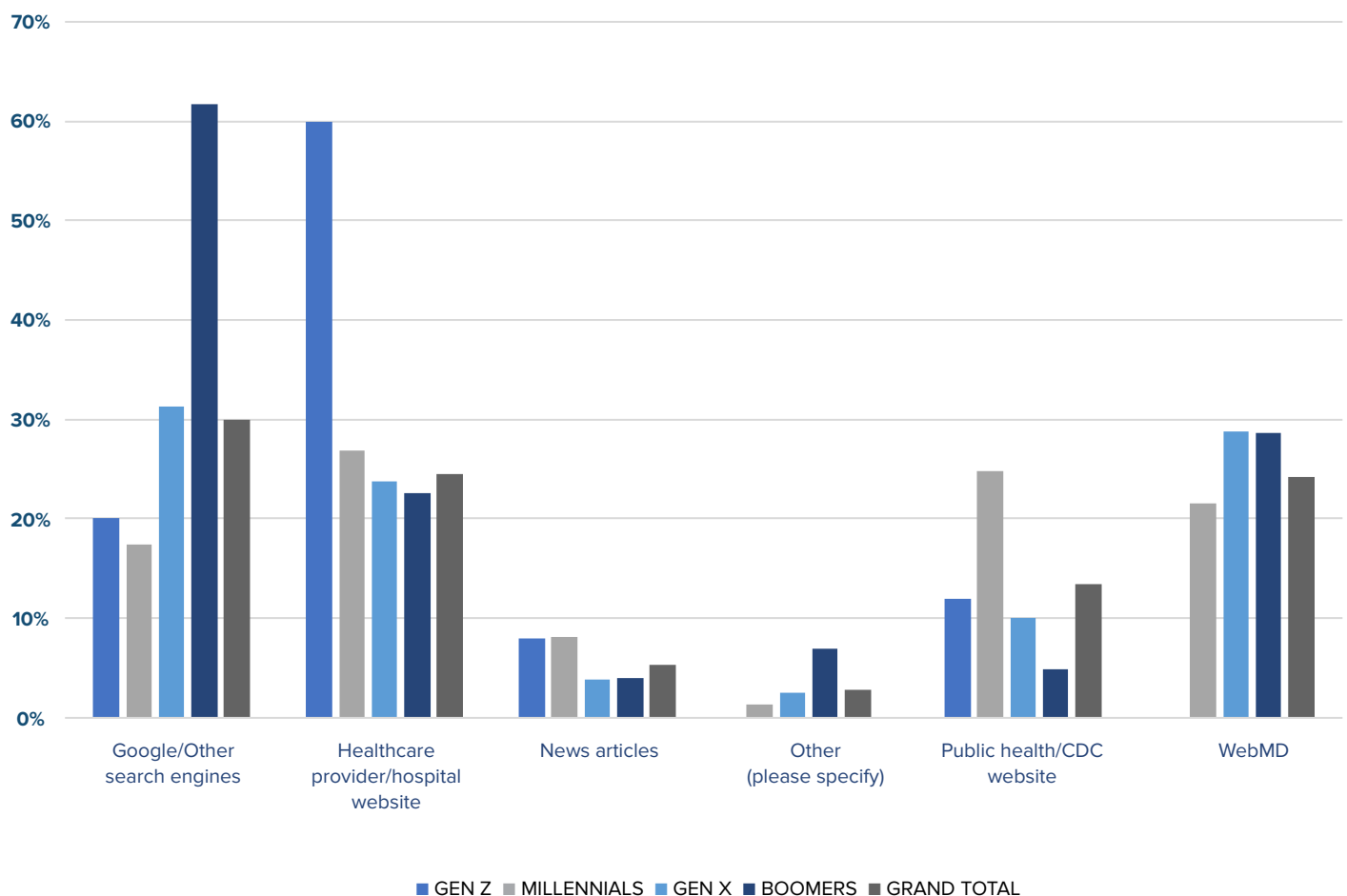
# WEBSITES, SOCIAL MEDIA, AND BLOGS

## What content do patients care about?

For many patients, the healthcare decision journey starts with research. Whether they're new to town and seeking basic care, or they need to figure out why they don't feel well, patients turn to the internet for information before they start their search for someone to treat them.

We asked survey participants to tell us how they utilize general tools like search engines and public information sources as well as the content presented by practices on their sites. The results might surprise you, but over 60% of Boomers say they use search (think Google and Bing) to find health information. GenZ favors information directly on the practice's website. Other generations are evenly split between search, practice websites, and WebMD for health information.

## HOW DO PATIENTS RESEARCH HEALTHCARE TOPICS?



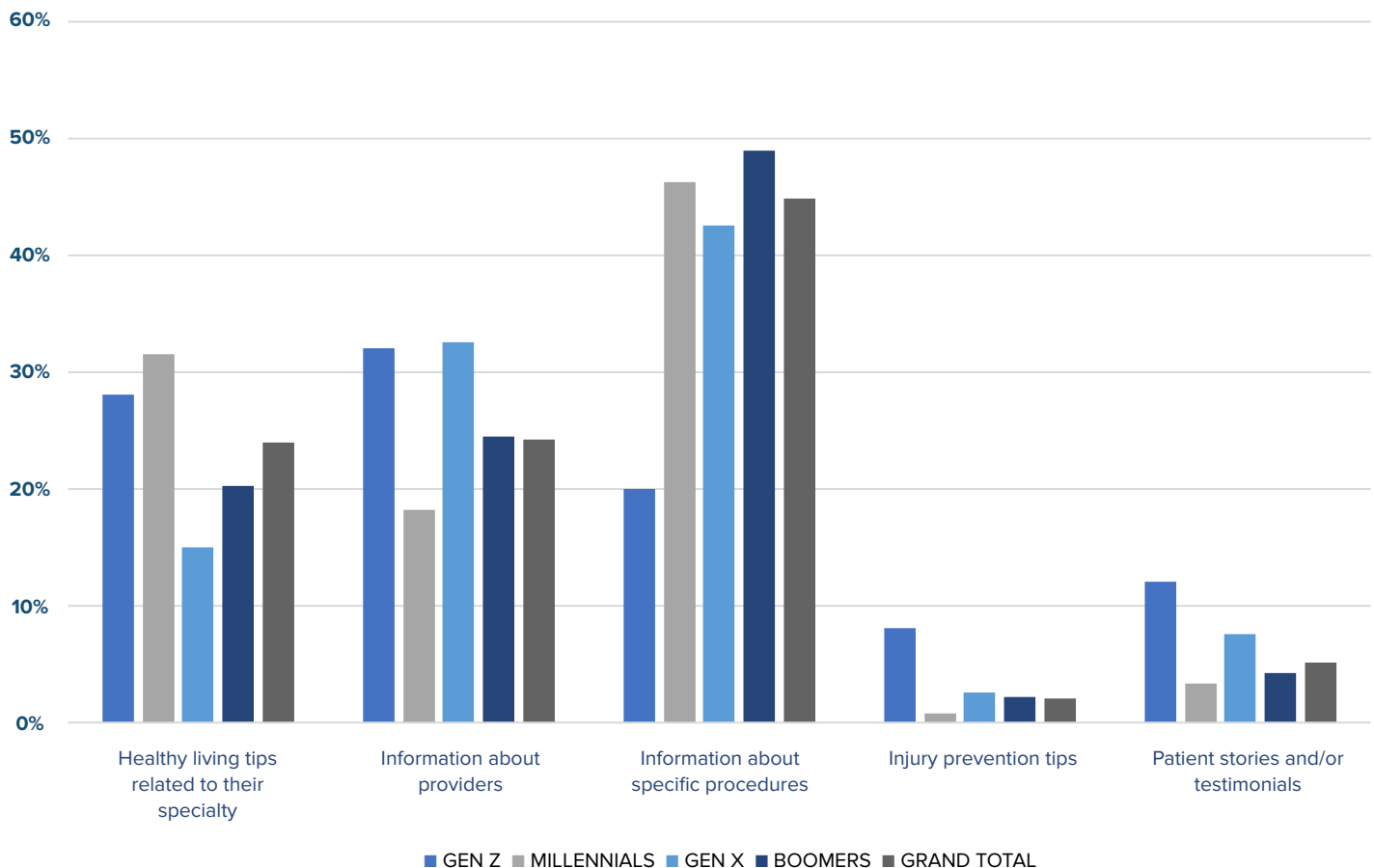
Once patients land on your website, provide them with information they seek. There are three main content areas that each generation cares about:

- **Information from YOU about specific procedures**
- **Information about the doctors in your practice**
- **Healthy living tips related to your area of practice**

The information doesn't have to only live on your website - you can use paid social media, targeted email, and other tactics to proactively share your content with prospects most likely to engage with it.



## WHAT TYPE OF CONTENT ARE PATIENTS INTERESTED IN ON HEALTHCARE/PROVIDER WEBSITES?

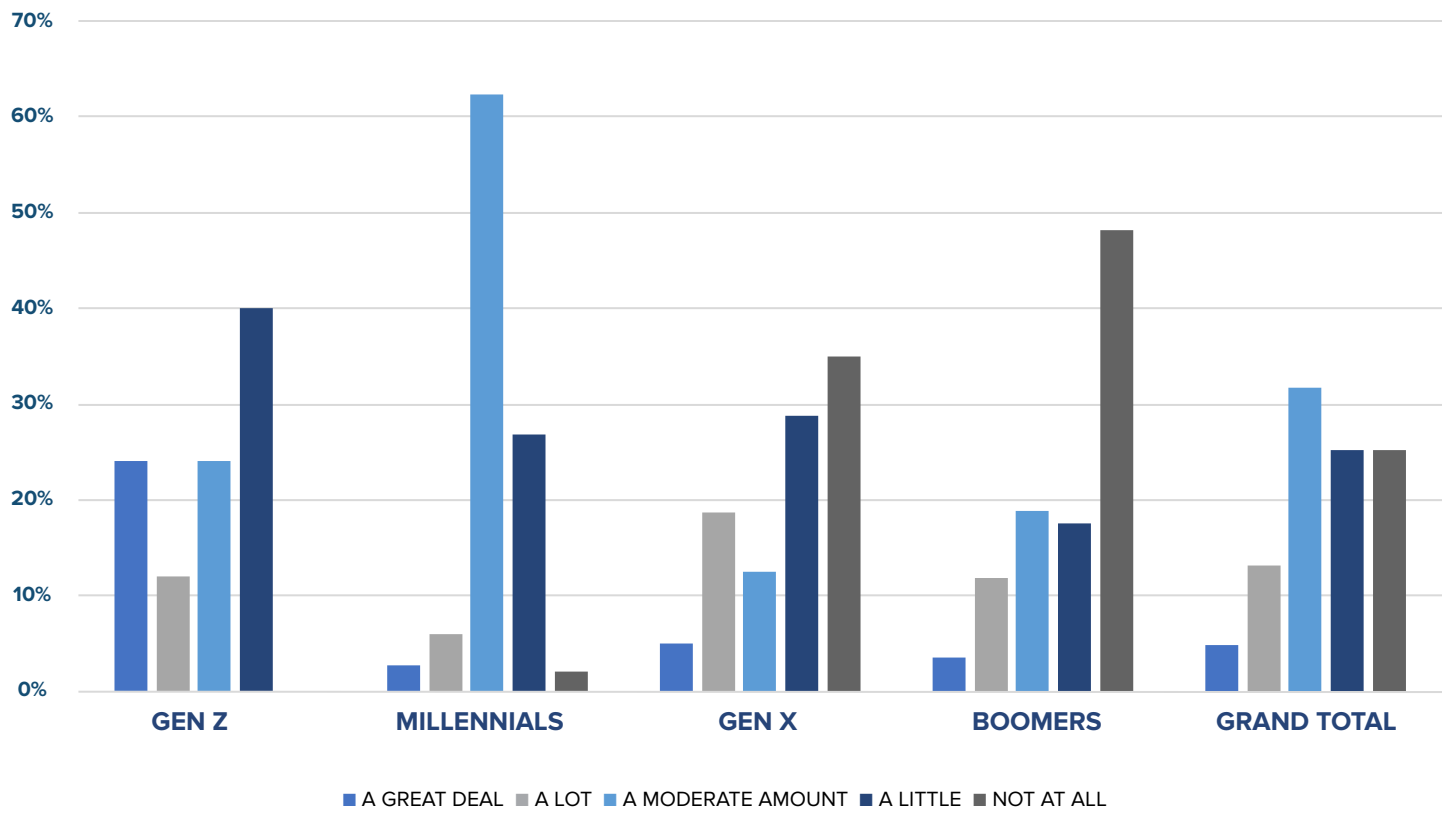




According to our survey, most segments do not go directly to the social media accounts of practices when they are seeking information. However, that doesn't mean they don't see content put on social media by practices. They aren't actively looking up the Facebook page of any business, but they do see content that is shared by the practice, or their own friends and family, as they endlessly scroll and swipe through their feeds.



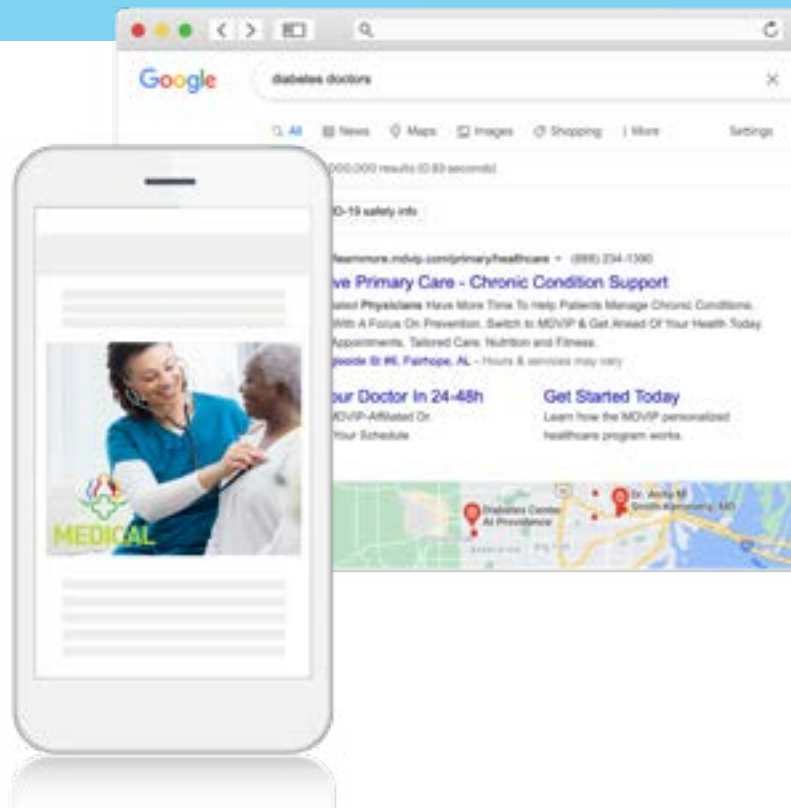
**WHICH PATIENT SEGMENTS RELY ON PRACTICE SOCIAL ACCOUNTS?**



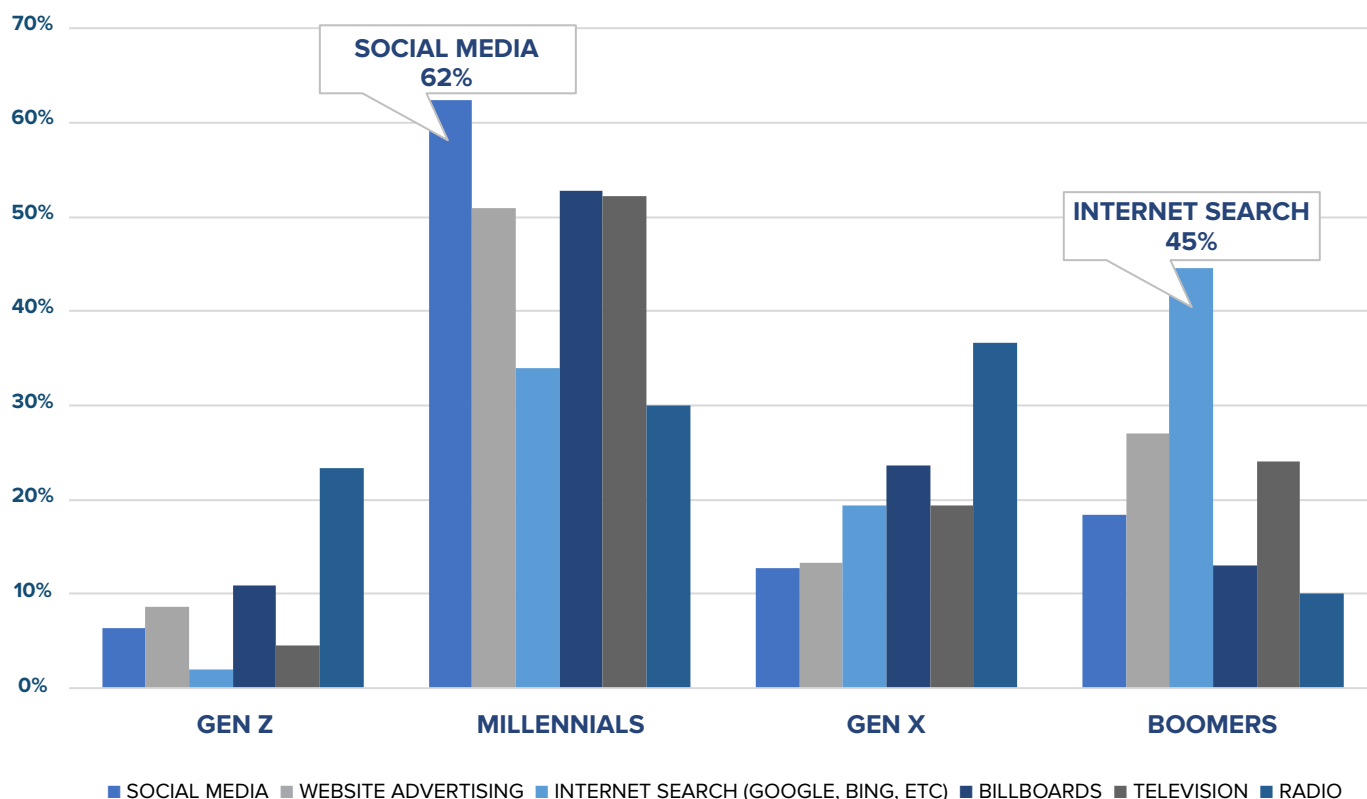
# AD AWARENESS BY GENERATION

Millennials are the most ad-aware generation of all the segments with over 50% noticing healthcare practice advertising on social media, websites, billboards, and television. Many kinds of digital advertising may not be perceived as advertising by the most digital generation of all – GenZ. Practices that effectively reach GenZ are putting out videos, memes, and blog posts that are consumed as valuable information even though they raise awareness of the practice, engage prospective patients, and draw them to a practice's website.

**The most effective "advertising" isn't advertising in the traditional sense of the word. What works best is content that the patients view as helpful, authoritative, and relevant to their current needs.**



## WHERE DO YOU NOTICE HEALTHCARE-RELATED ADVERTISING?

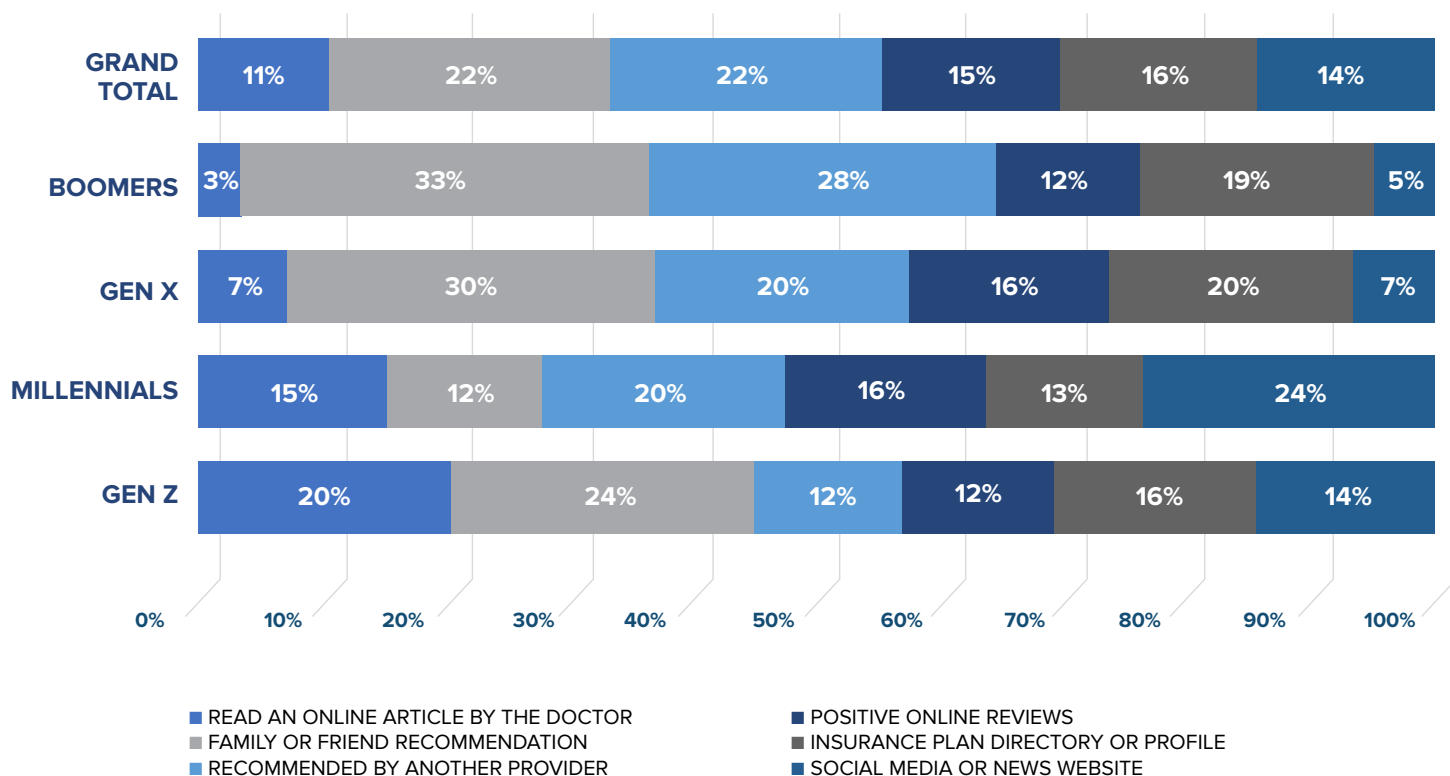


# PRIMARY CARE INFLUENCES

Remember that the healthcare journey for most new patients starts with researching a condition or searching for care after moving to a new area. After they've done their research, they move to deciding on what doctor to see, if they don't already have a primary care physician. What are the trusted sources of information for Southeastern patients? There are six primary sources of influence that guide primary care shoppers ranging from blog articles published by practices to family recommendations, provider recommendations, and social media.

As we move from the youngest to the oldest (bottom to top) generations, we see the influence of online sources heavy with GenZ and Millennials while family/friends and other doctors influence GenX and Boomers more. Even when family and friends are the trusted sources of advice, practices need to make sure they are establishing themselves in their communities so that community members will recommend them when they are asked for advice.

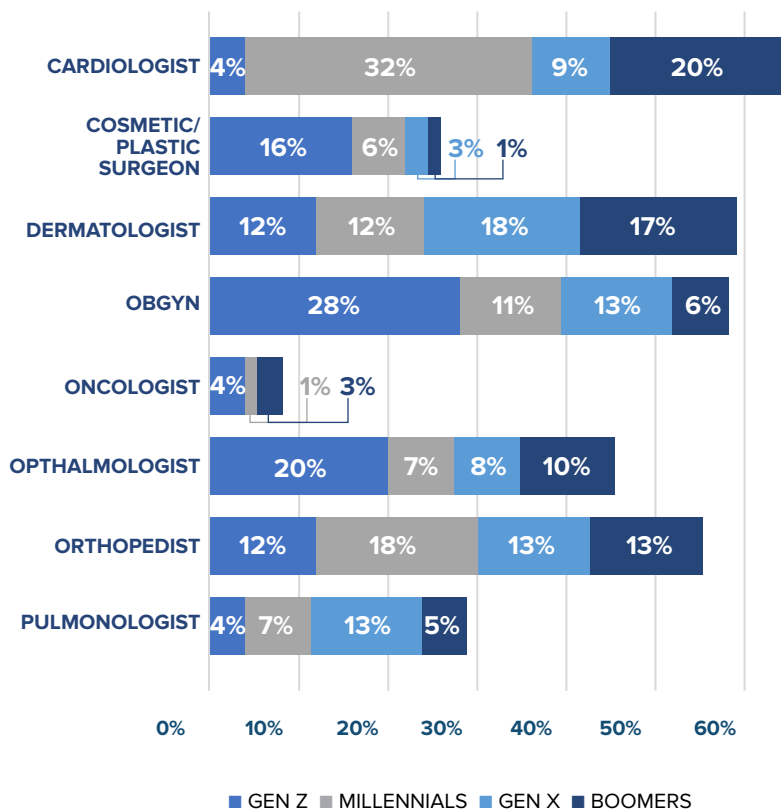
## HOW DO YOU CHOOSE PRIMARY OR PEDIATRIC CARE?



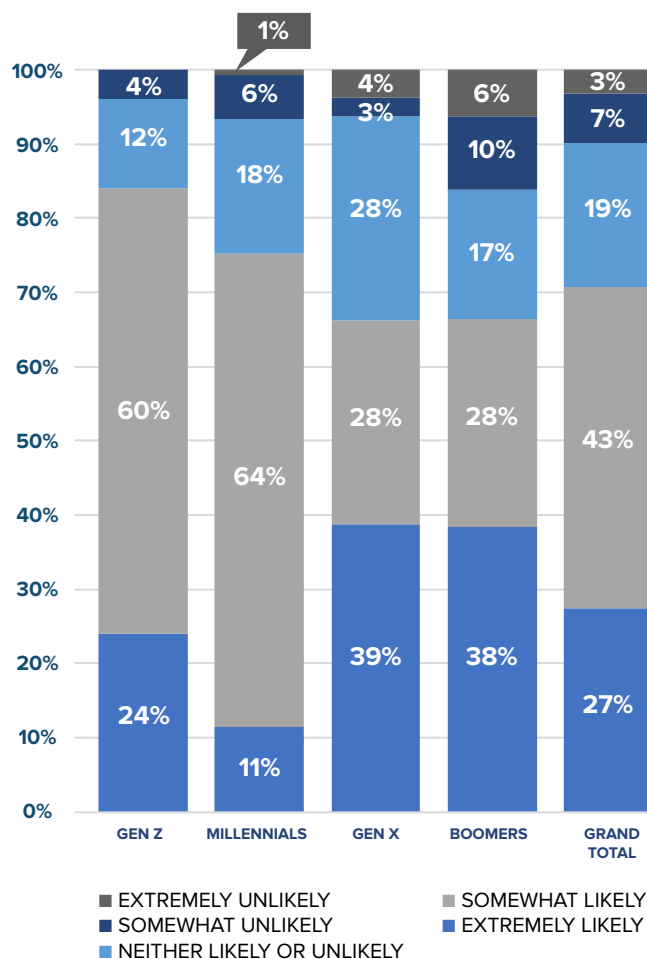
# SHOPPING FOR A SPECIALIST

Surprisingly, every generation reports that they are somewhat likely or extremely likely to be in the market for specialist care in the next 12 months (as of May 2023). Understanding who is in the market for your specialty is the key to right-sizing your marketing efforts with the opportunity for growth.

## CATEGORY OF SPECIALIST



## SHOPPING FOR A SPECIALIST IN THE NEXT 12 MONTHS

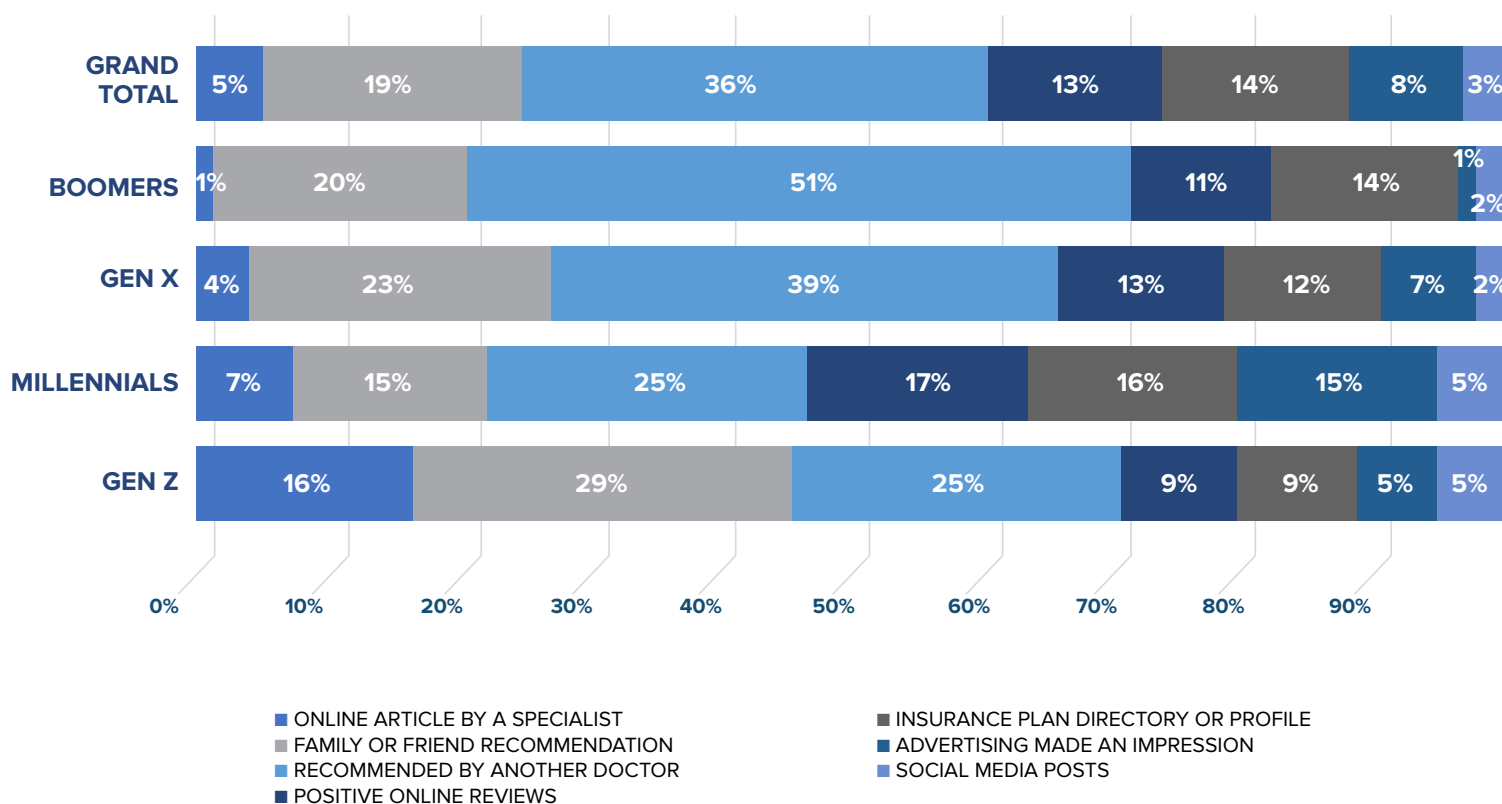


# SPECIALIST CARE INFLUENCES

Provider referrals are dependent on more specialty care decisions than primary care, but that could be influenced by insurance requirements as well. Specialists are experts in their field, but getting others to rely on your expertise is the key to growth and success. Sharing your expertise with a target audience of primary care doctors through social media, email, and events can help you win at patient acquisition. Additionally, with the concept of Patient Choice being on the rise, patients are learning they can choose a specialist other than a provider referral.

Many insurance plans don't require a physician referral, so differentiating yourself from the patient directly is very important. Positive online reviews are important, but so is branding yourself to potential patients.

## HOW DO YOU CHOOSE A SPECIALIST?

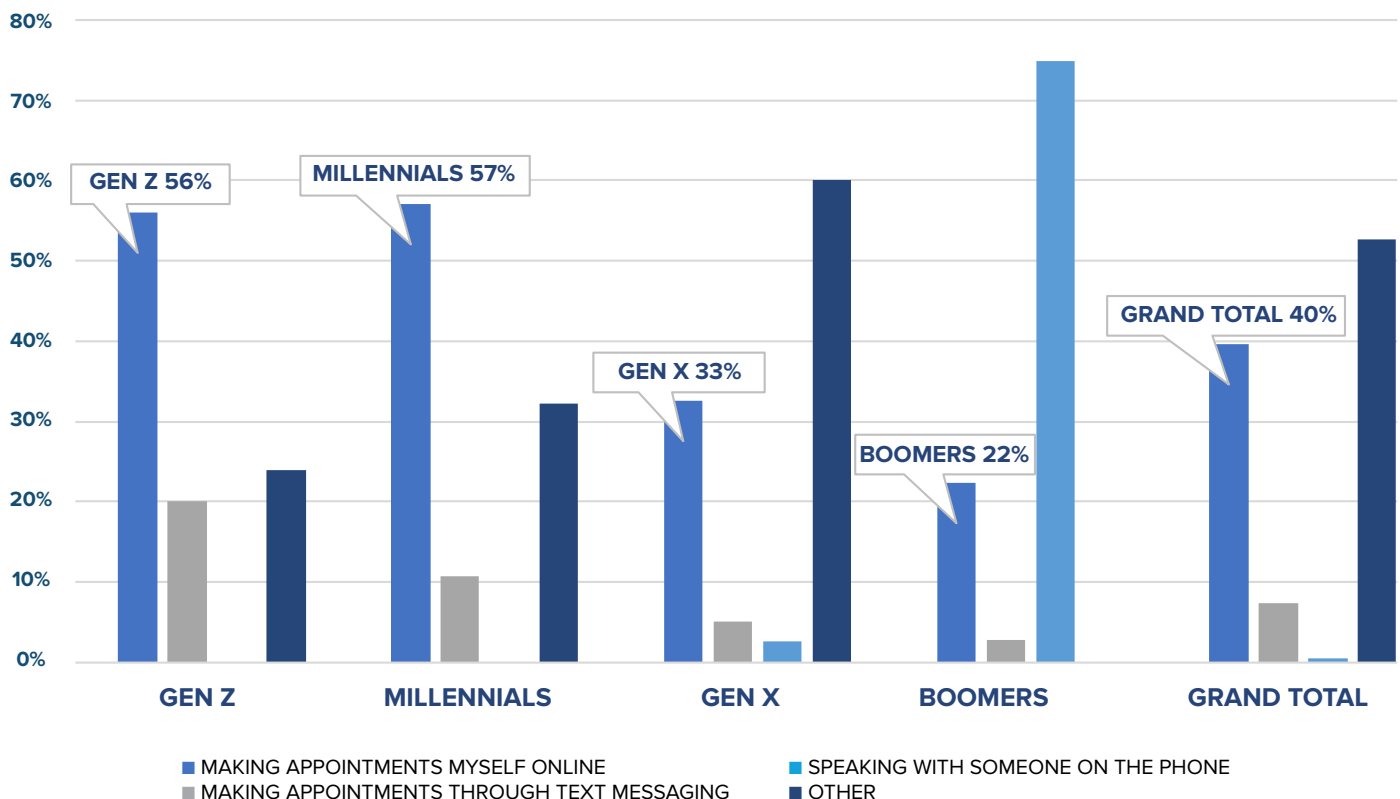


# APPOINTMENT SETTING AND TELEMEDICINE

Once you've gotten the attention of your prospective new patient, they need to be able to set up a new appointment using the methods they prefer. Gen Z and Millennials are accustomed to booking EVERYTHING online. And healthcare shouldn't be the exception. Most of each group prefers an online portal or website. Boomers are different though – so if you have a significant patient population in this generation, make sure your phone lines are open and you have a live person available.

**The majority of Boomers favor human assistance when making appointments**

## WHEN MAKING APPOINTMENTS WITH YOUR DOCTOR, WHICH OF THE FOLLOWING DO YOU PREFER?

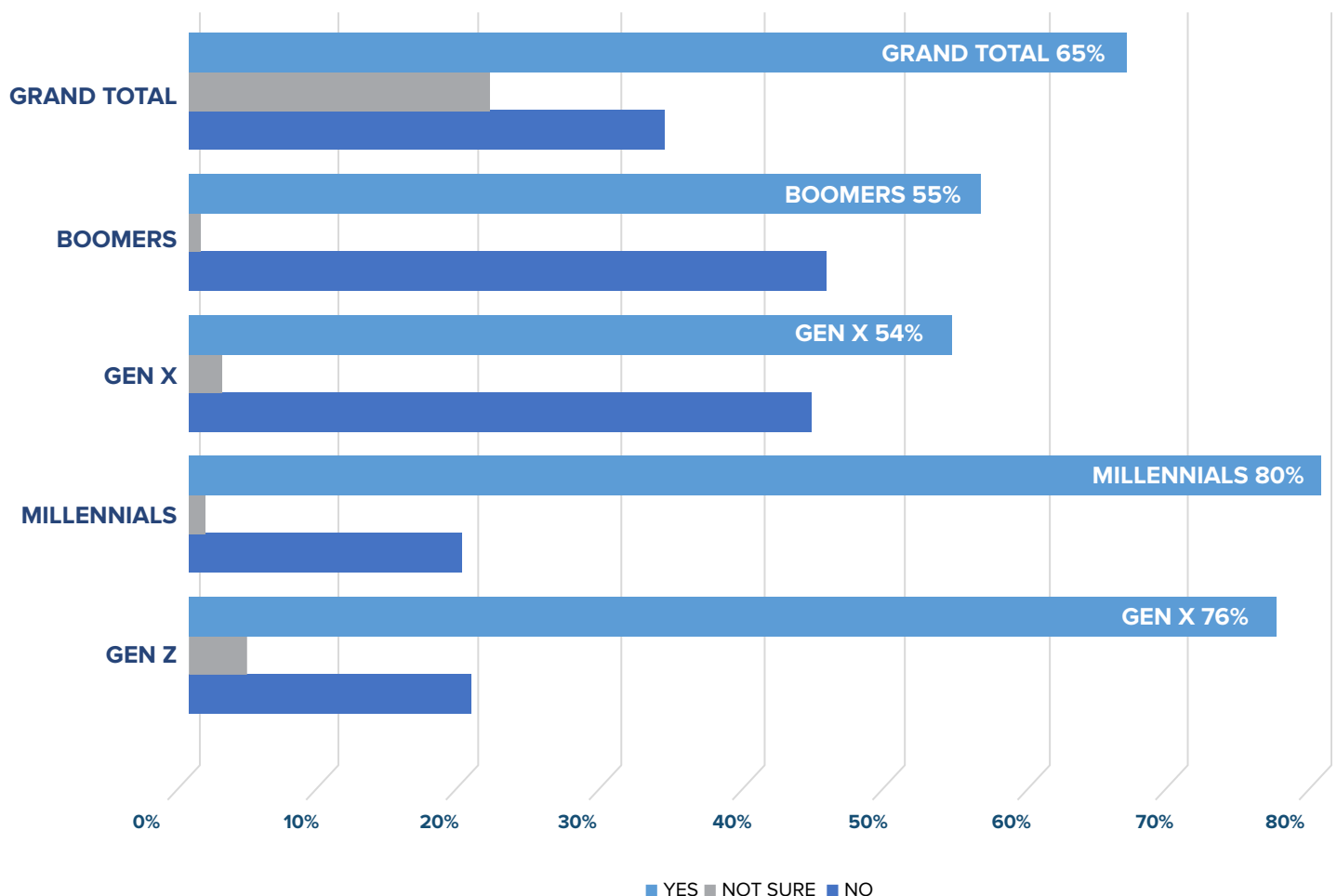


# APPOINTMENT SETTING AND TELEMEDICINE

It's not surprising that all generations have tried telemedicine since it gained popularity during the early stages of the COVID-19 pandemic.

**OVER 50%**  
of all patients have  
tried telemedicine

## HAVE YOU USED TELEMEDICINE INSTEAD OF AN IN-PERSON VISIT?

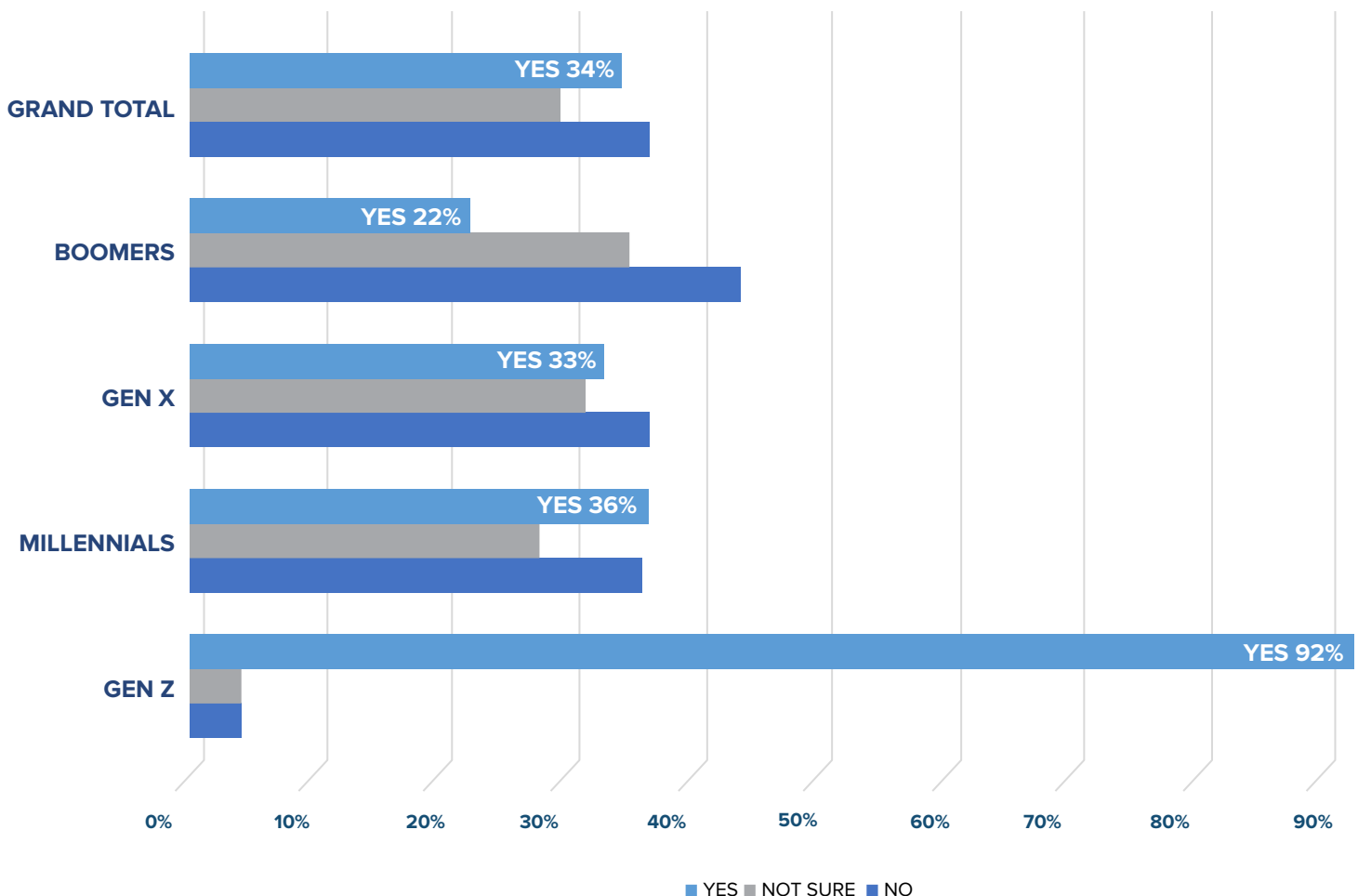


# APPOINTMENT SETTING AND TELEMEDICINE

The effectiveness of telemedicine was questioned by all generations except for Gen Z. But, satisfaction with the experience of telemedicine is highest (and nearly universal) for the youngest generation. Southeastern Millennials and older are not sold on the option.

The effectiveness of telemedicine was questioned by all generations except for **Gen Z**

## DO YOU THINK TELEMEDICINE WAS AS EFFECTIVE AS AN IN-PERSON VISIT?





Acquiring and retaining patients is vital to every healthcare practice. Create your strategy by analyzing the makeup of your practice. Keep in mind the insights we learned from the survey. Then, craft your messaging, blogs, social media, website, email, and marketing strategy to meet the specific needs of each of the patient segments in your community.

Sound like a heavy lift? Advance Healthcare Marketing is a great partner to have. We're marketing experts who understand the unique challenges healthcare providers face to balance growth and retention.

Advance Healthcare Marketing is here to help you adapt to coming changes and make the most of evolving trends.

Reach out and [contact us](#) anytime. We'd love to hear from you.

