

DRIVING CONSUMER ENGAGEMENT

for Immediate and Long-Term Financial
Impact to Health Organizations

As the United States experiences the second wave of COVID-19 cases, the brief and slight return to normal that marketers experienced earlier this summer is giving way, once again, to the challenges of hospitals filling with COVID patients. Practically speaking, that means efforts to acquire new patient volume are likely to be put on hold until cases subside to a reasonable level.

The question then becomes, what to do?

The answer, based on our consumer insights study, is to create a patient engagement strategy.

At Hailey Sault, our latest research-backed insight is that Q1 2021 is a critically important time to prioritize patient engagement over acquisition.

A recent [Campfire Session](#) with Chris Hemphill of SymphonyRM highlighted the fact that patients who become disengaged with their health care provider become far more likely to switch health care systems. Following that conversation, we executed our own national research survey around patient engagement, and the results should also inspire you to pay attention to this dynamic. Here are the biggest insights from the research.

Creating a meaningful, measurable engagement strategy should be a top priority as soon as possible. As many as 31% of patients in your system are considering moving to your competition. Of those patients who said they feel “disengaged,” nearly 50% are likely looking at your competitors right now.

A resonant engagement strategy will strike a balance between compassionate care and COVID information. Compassionate care is a big trigger for patients choosing to switch. At the same time, they want new COVID information, especially regarding testing, from a local trusted source.

Interest in vaccination information has made its way into our research for the first time. People want to know when, how and where they can get vaccinated. There will be a race in your community to provide vaccines, and those who communicate the details around it effectively may gain new patients.



Why focus on engagement?

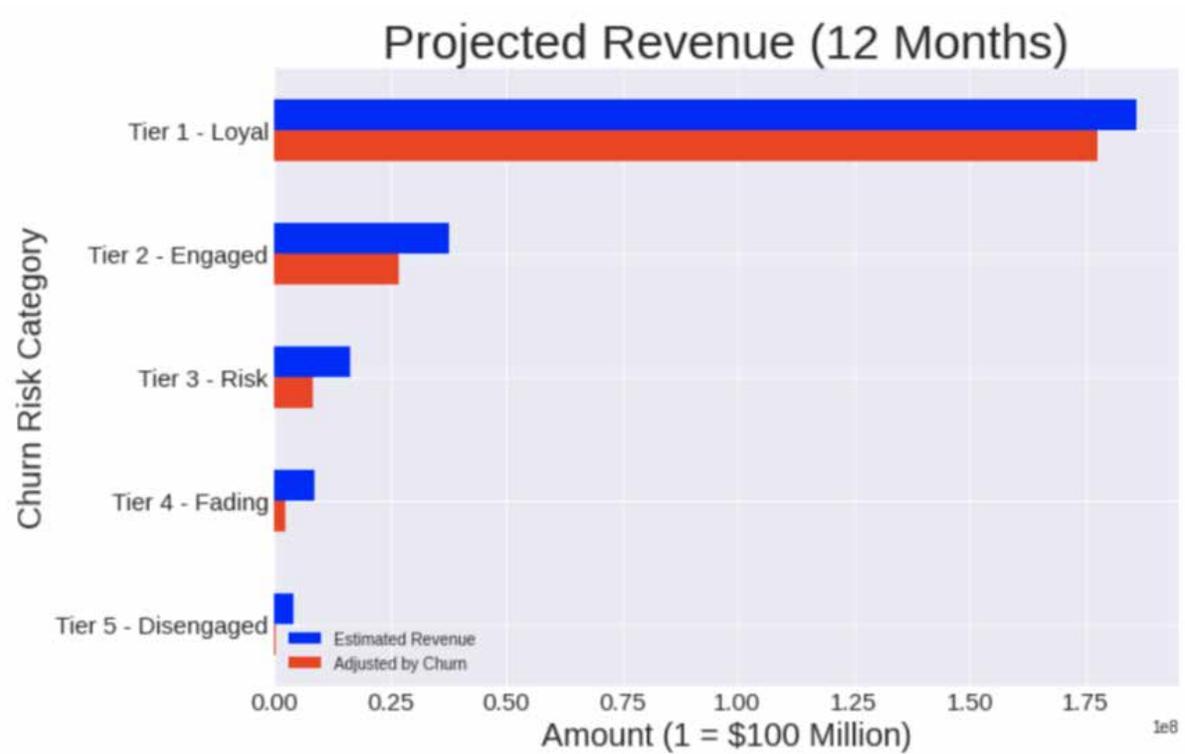
As COVID rages on, your risk of patient out-migration, or “churn,” during COVID increases in equal proportion to the lack of engagement they experience. Driving up patient engagement so that you can reduce churn is key to ensuring future revenue, including:

High value elective procedures such as orthopedics, robotics, GYN, when it’s safe and reasonable to bring patients back for this care



Guarding market share, and the accompanying predictable revenue from your current patient population

We highlighted this in our November 19th [Campfire Session](#) with Chris Hemphill from SymphonyRM. During that session, we discussed the stratification of patients from being loyal and engaged, to at risk and disengaged. Those that trend toward at risk and disengaged were increasingly likely to switch providers. As we also discussed, in the bottom line for the hypothetical health system used in the SymphonyRM model, a 14% churn in patient volume could hypothetically result in \$37 million (see next page) in lost revenue over just twelve months. What would 14% churn in patient volume do to your organization?



(Source: Symphony RM)

Sitting in your chair today, would it be valuable to you if, by April or May, you could prove to your executive team that you'd measurably increased patient engagement across your organization, and thereby reduced the likelihood of out-migration? Considering all the things that seem to be out of our control today, this is the best opportunity to positively impact health care organizations in the next six months.

About The Research

We surveyed 700 people in various markets across the country, reexamining the core drivers for choosing a provider, their own level of engagement in their health, their health system's level of engagement, and what's important to know right now.

One objective of the survey was to measure the relative risk of engaged patients leaving their provider or health system. The survey included those that make the health care decisions for their household, identified those who seek routine care (under normal conditions), and who consider themselves active participants in their own health. In other words, your ideal patient population.

- Of the 700 respondents, 100% indicated that they're either the primary decision maker, or share equally in health care decisions for their household.
- 72.86% of respondents (510) indicated that they and their family routinely see their physician for annual checkups and screenings.
- 80% of respondents (560) indicated that they're actively engaged in their own health, including their relationship with their doctor, health system or hospital.
- 20% of respondents (140) consider themselves passively engaged in their own health.
- 95% confidence level

What follows may not be altogether surprising—disengaged patients are predisposed to exit your system—but it should help you see to what degree they're "shopping" and why. And with that insight, you have a chance to keep them and the revenue they represent.

Insight No. 1: Approximately 31% of patients are thinking of switching today. This is consistent with Hailey Sault’s 3-year consumer engagement survey results.

Are you considering switching healthcare providers, including your doctor, hospital, or health system today?

| # | ANSWERS | ANSWERS(%) | COUNT |
|----|--------------------|------------|-------|
| A1 | Definitely yes | 14.57% | 102 |
| A2 | Probably yes | 17.14% | 120 |
| A3 | Might or might not | 19.00% | 133 |
| A4 | Probably not | 23.71% | 166 |
| A5 | Definitely not | 25.57% | 179 |

TOTAL UNIQUE RESPONDENTS: 700

Insight No. 2: Since March 2020, less than 50% of consumers believe their providers have engaged with them via personal communication or other similar outreach efforts.

Insight No. 3: Of those people who felt their health care provider was “not engaged,” approximately 46% are considering other health care providers. For this group of disengaged patients, the risk of leaving is nearly 15% higher than overall respondents.

If you answered "Not engaged" to the previous question, do you feel more or less likely to consider other health systems, hospitals or doctors for your next healthcare needs?

| # | ANSWERS | ANSWERS(%) | COUNT |
|----|--|------------|-------|
| A1 | I know I'm staying with my current healthcare provider | 53.39% | 63 |
| A2 | At least 50% likely to switch | 27.97% | 33 |
| A3 | More than 50% likely to switch | 18.64% | 22 |

TOTAL UNIQUE RESPONDENTS 118

Insight No. 4: While people may feel disengaged because of the effects of COVID-19, what they want from their next health care provider remains consistent with pre-COVID-19 desires.

- “Compassion. I want my provider to care about what I’m saying and feeling.”
- The word “compassion” or “care” showed up in 20% of open-ended responses
- Insurance coverage and price transparency
- Knowledgeable physicians who communicate options clearly

Insight No. 5: Personal communication matters.

Respondents indicated the best way their health care providers have stayed in touch during the pandemic is:



Additionally, they indicated that this is how they prefer to be communicated with in the future!

Insight No. 6: While the things that drive their health care decisions remain relatively stable, what they want from their health care provider now is information about COVID-19.

Updates in their community remain a high priority, as does testing information. The next biggest trend is information on vaccination. We believe this may be the single most significant engagement opportunity in Q1 and Q2, 2021.

Insight No. 7: You can measure it through your owned media platforms.

If your health system, hospital or doctor regularly engaged you on one of the subjects that's important to you, what is the most likely way you'd respond?

| # | ANSWERS | RESPONDENTS(%) | ANSWERS(%) | COUNT |
|----|--|----------------|------------|-------|
| A1 | Go to their website and learn more | 54.86% | 27.95% | 384 |
| A2 | Subscribe to receiving more information | 31.00% | 15.79% | 217 |
| A3 | "Like" social media content | 25.14% | 12.81% | 176 |
| A4 | "Share" social media content | 16.14% | 8.22% | 113 |
| A5 | Forward an email to those closest to you | 21.71% | 11.06% | 152 |
| A6 | Share your positive experience with others | 44.71% | 22.78% | 313 |
| A7 | Other | 2.71% | 1.38% | 19 |

Measuring Consumer Engagement

The most frequently-used consumer engagement metrics are:

- Website metrics
- Digital marketing metrics
- Organic social media metrics

These metrics can help you measure the average engagement rate of visitors but it also provides an opportunity to improve site experience and the content you create and share on your site.

Digital marketing engagement metrics include:

- Email open and click rate
- Post click site activity
- Reduction in attrition rate
- Total engagements
- Response rate

Standard website metrics for engagement start with the setup of robust analytics in order to track key activity and action taken across your site. Measurable items include:

- Total page views of return visitors
- Average time spent on pages
- Average session duration
- Top content shares
- Video completion rate
- Number of pages visited post-landing-page

The most popular organic social media metrics depend on the channel but typically include:

- Post reactions
- Likes
- Total shares
- Rate of engagement (total actions taken on the post divided by reach)
- Comments and replies
- Link clicks
- Referral traffic demographics



Creating meaningful engagement scoring from these sets of metrics isn't as difficult as it may appear. Each organization we work with has a unique set of attributes that the market values—or more importantly, that it wants the market to value. Therefore, each metric can be weighted depending on its likelihood to create more affinity for these qualities.

Conclusion

Health care organizations are at a critical juncture for their marcom strategies.

Based on what we're observing from organizations across the country, it is a difficult time to try and achieve ROI on patient acquisition. A pivot away from those standard acquisition plans to patient engagement strategies will help reduce out-migration, and preserve patient volume, market share, and revenues in 2021. Moreover, these efforts can be tracked and measured, and the contribution to the health system can be quantified.

ABOUT HAILEY SAULT

We work with brands across the country to deliver patient acquisition, engagement and advocacy. But the way we do it, in our process and as people, is why we achieve remarkable results.

It's an empathetic yet data-driven, artful yet scientific way of doing things. With human-centered personas and patient journey mapping, we allow deep insight to guide carefully crafted messaging. With strategic creative and agile media optimization, we continue to listen, refine and respond. So we can connect better with your audiences, and help them feel better connected with you.



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