

# Survey of Healthcare Marketers

*Results & Insights*

**BIA** | ADVISORY  
SERVICES

**SalesFuel**<sup>®</sup>



# Briefing Agenda

- Meet SalesFuel and BIA Advisory Services
- Details About the Healthcare Survey
- Healthcare Ad Spend Analysis: BIA Forecast
- Healthcare Audience Analysis: SalesFuel
- Survey Results & Insights
- Final Takeaways
- *More Services from SalesFuel and BIA Advisory Services*
- Firmographics



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BIA Advisory  
Services



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*CEO*  
SalesFuel

# The Healthcare Survey and Insight Report are published by local advertising and sales intelligence experts.



SalesFuel® research empowers you to attract, grow and retain your best customers. We also help hundreds of sales and marketing teams nationwide with the sales tools, training and intelligence to Sell Smarter®.

Our portfolio of SaaS platforms includes AdMall® - tactical business intelligence used by more than 15,000 local media sales and digital marketing professionals. It makes selling easier, improves marketing results and is proven to generate rapid return-on-investment.

[Learn more about us.](#)



BIA guides local business excellence through our comprehensive advertising forecasts and analysis. For over 40 years, we have delivered reliable, industry leading forward looking and historical local advertising forecasts by media for business verticals.

Healthcare is just one vertical in our coverage area that includes auto, retail, finance, restaurants, home improvement and more. Let us know how we can help your business goals with our forecast data, insights and recommendations.

[Learn more about us.](#)

# What Healthcare Marketers are Planning for 2024

Unique survey of healthcare marketers reveals intentions and priorities

**Topics include:**

Media ad budgets

Top priorities

Most favored CTV channels and genre

Selection of CTV ads

Outsourced healthcare services

Artificial Intelligence

Marketing Tactics

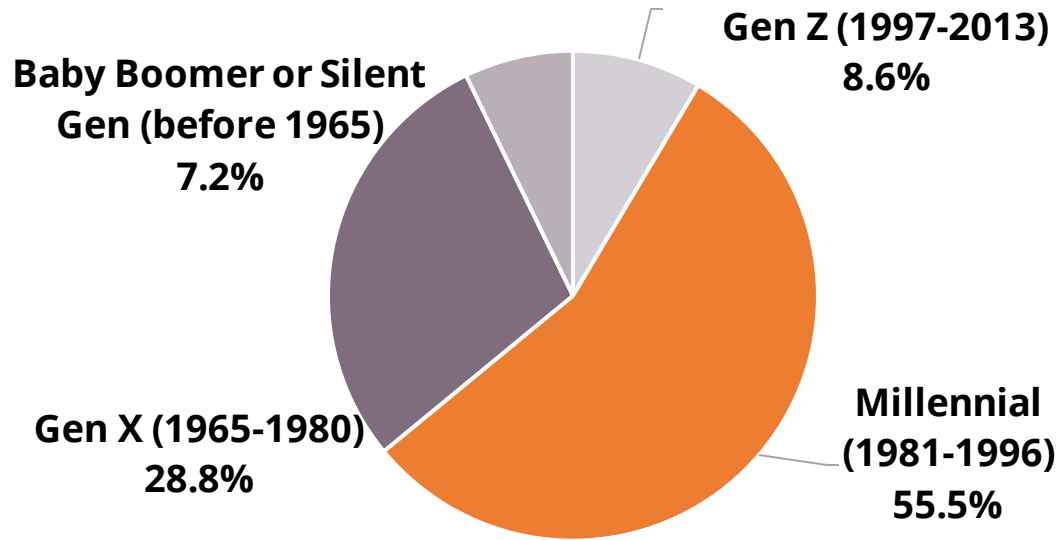


*See survey firmographics in the appendix for full survey details.*

# Survey Firmographics

See more survey firmographics in the appendix.

## Respondent's Generation

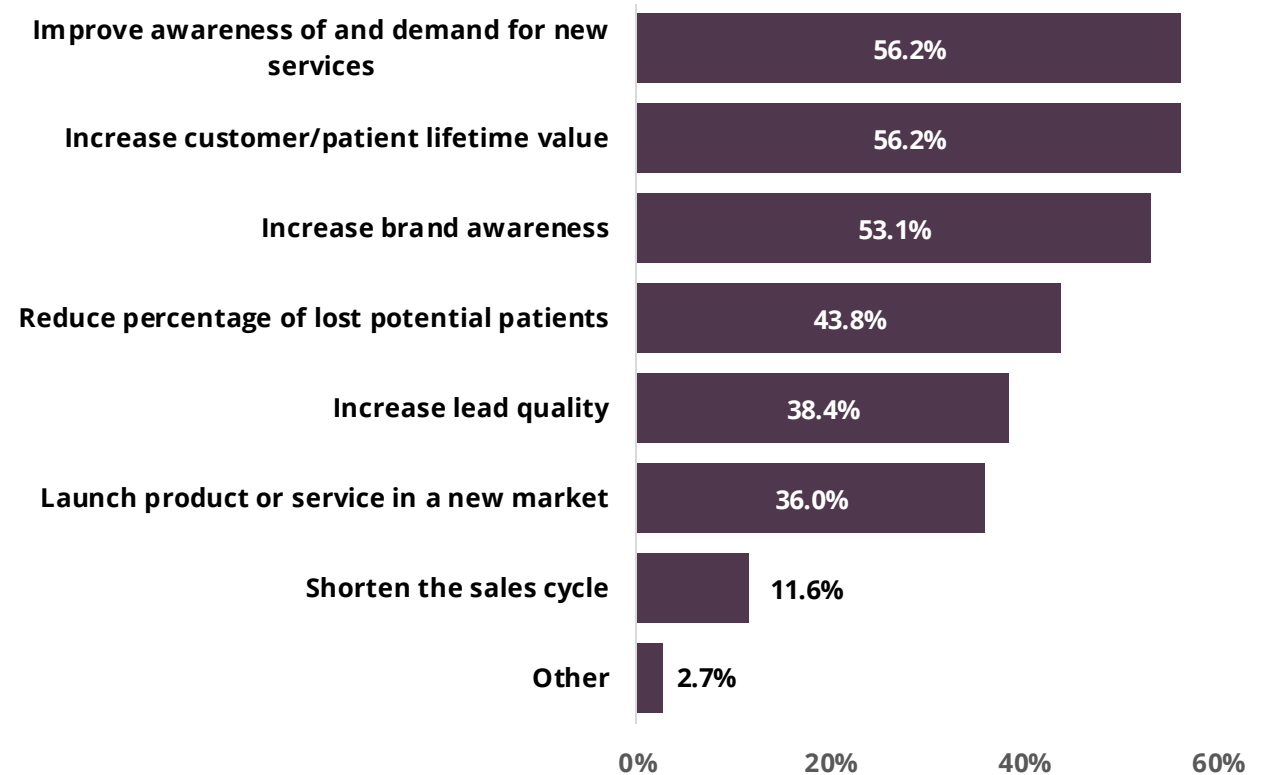


Q4) Which generation do you belong to?

Q7) How many employees are on your marketing team? (Do not include contractors.)

Sample Size 292

## Marketing Objectives





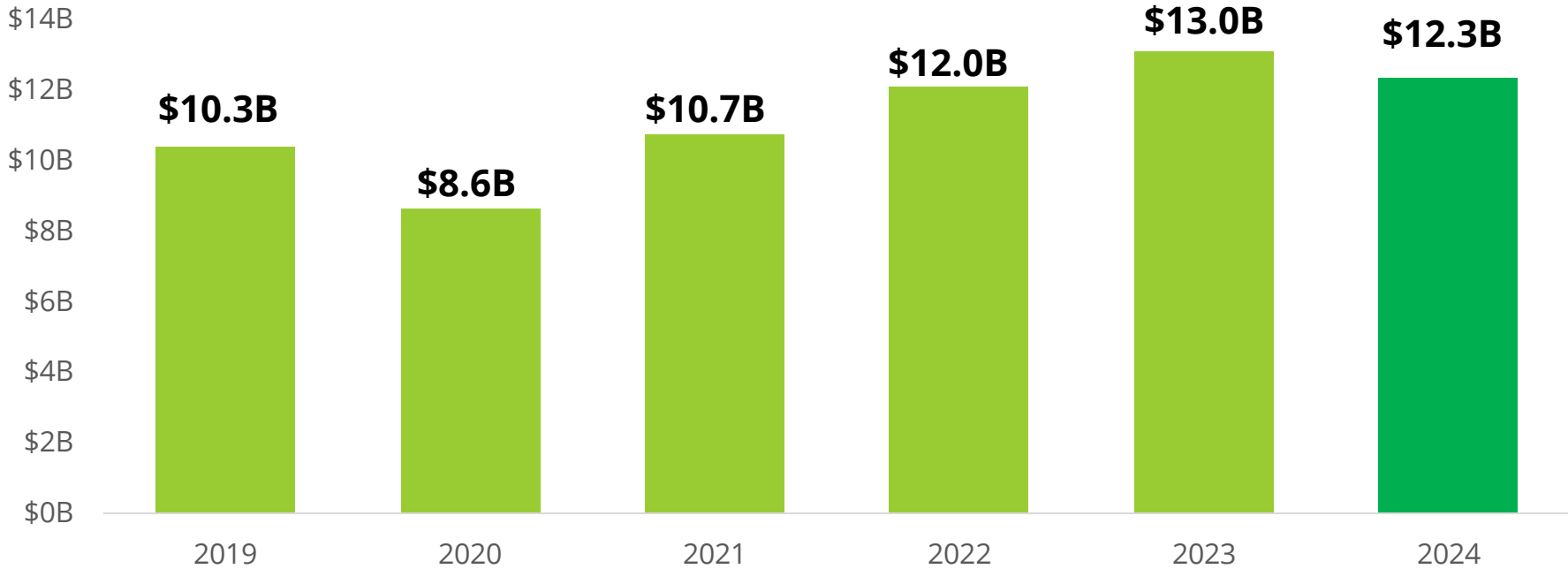
# Healthcare Ad Spend Analysis

**BIA's Vertical U.S. Advertising Forecast**



# Healthcare Ad Spending: Trends and Forecast

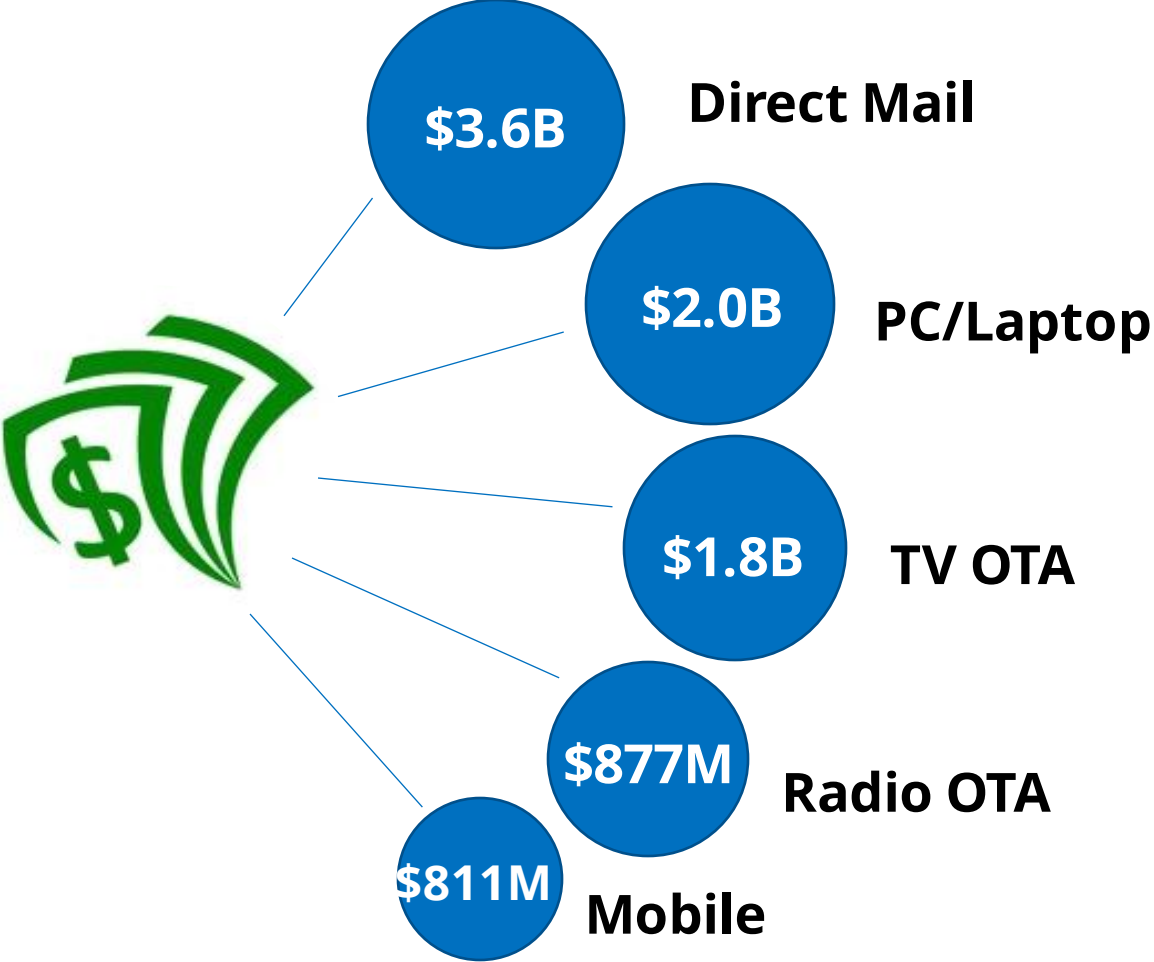
2019-2024 Total U.S. Healthcare Category Spending



- Although overall healthcare ad spending will be down -5.4% Y/Y, spend is strong and will benefit from political crowd out.

Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.

# Healthcare Top Five Media Channels by Spend in 2024



## BIA Insights

The largest **growing** media year-over-year:

- CTV/OTT (+\$21M)
- PC/Laptop (+\$61M)
- TV Digital (+\$6M)

The largest **dropping** media year-over-year:

- Direct Mail (-\$522M)
- Newspapers Print (-\$59M)
- Cable TV (-\$49M)

Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.



# Healthcare Top Verticals by Spend in 2024

## Top Local Spending by Healthcare Verticals in 2024

Hospitals



**\$4.6B**

Offices of  
Physicians/Dentists/  
Chiropractors



**\$4.1B**

Pharmaceutical &  
Medicine  
Manufacturers



**\$2.2B**

Nursing and  
Residential Care  
Facilities



**\$663M**

Health and Personal  
Care Stores



**\$868M**

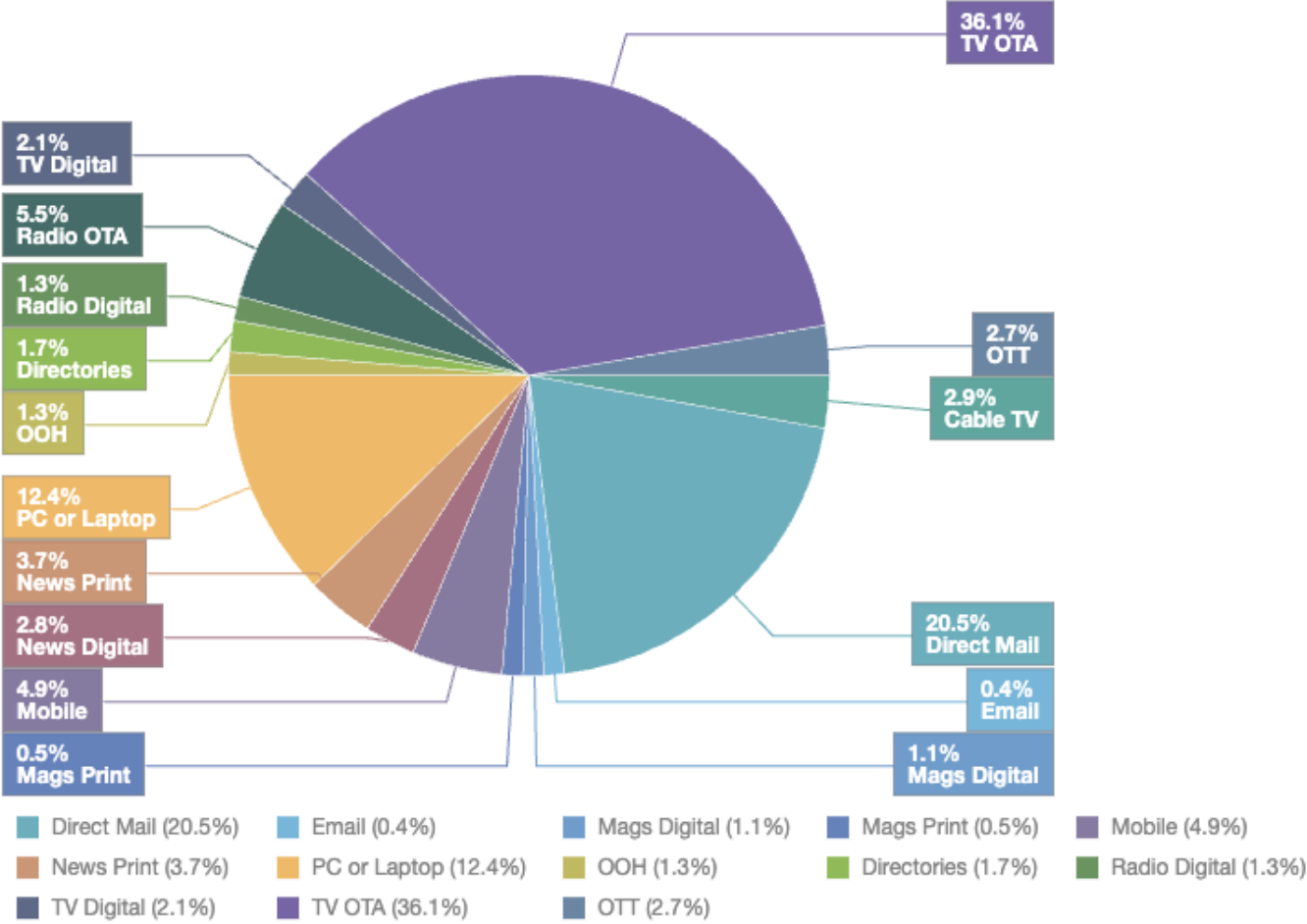
Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.

# Pharmaceutical & Medicine Manufacturers Spending by Media Channel

## Local Spending by Pharmaceutical & Medicine Manufacturers in 2024



**\$2.2B** Local Advertising Spending in 2024



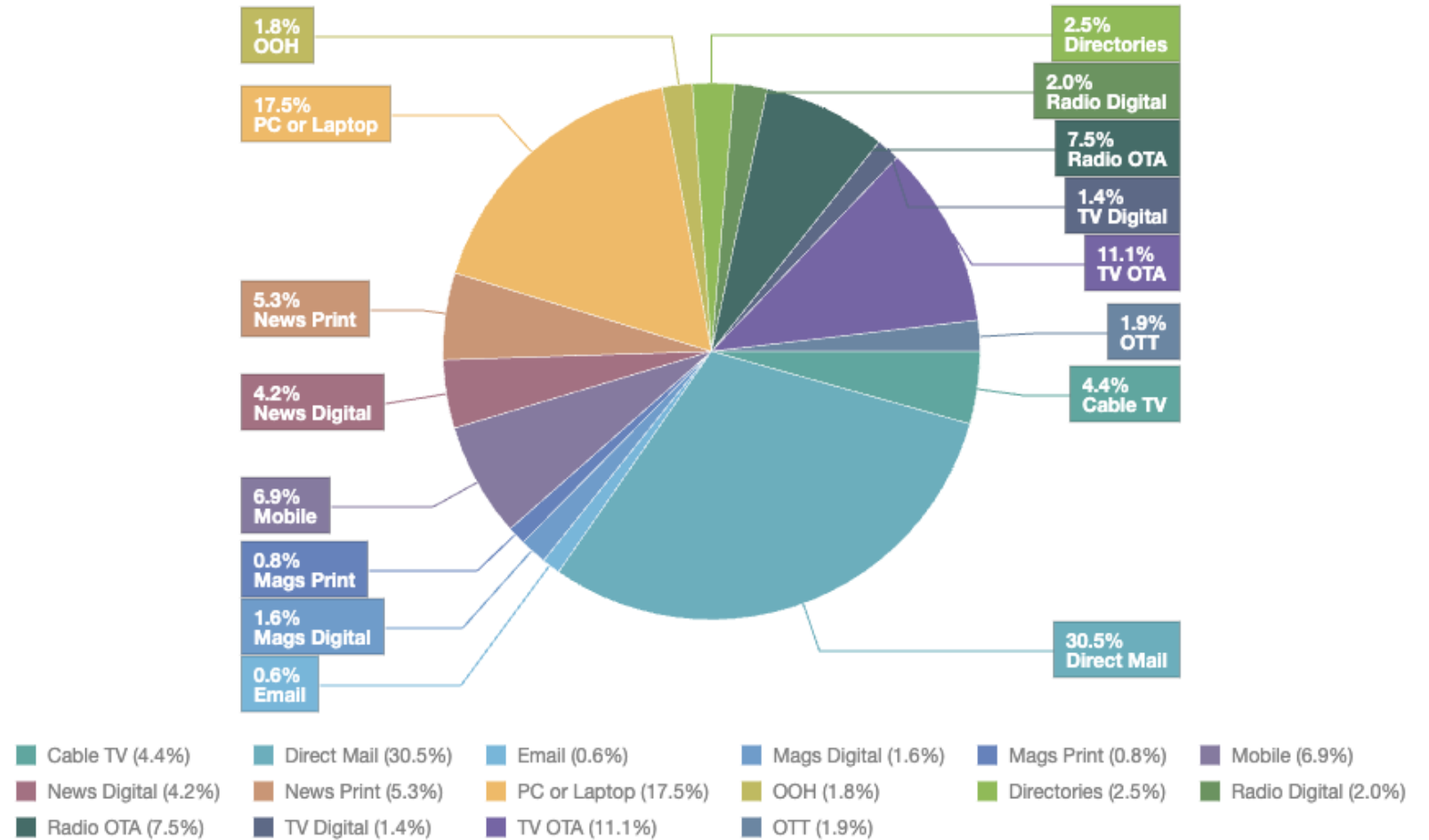
Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.

# Offices of Physicians/Dentists/Chiropractors Spending by Media Channel



**\$4.1B** Local Advertising Spending in 2024

## Local Spending by Offices of Physicians/Dentists/Chiropractors in 2024



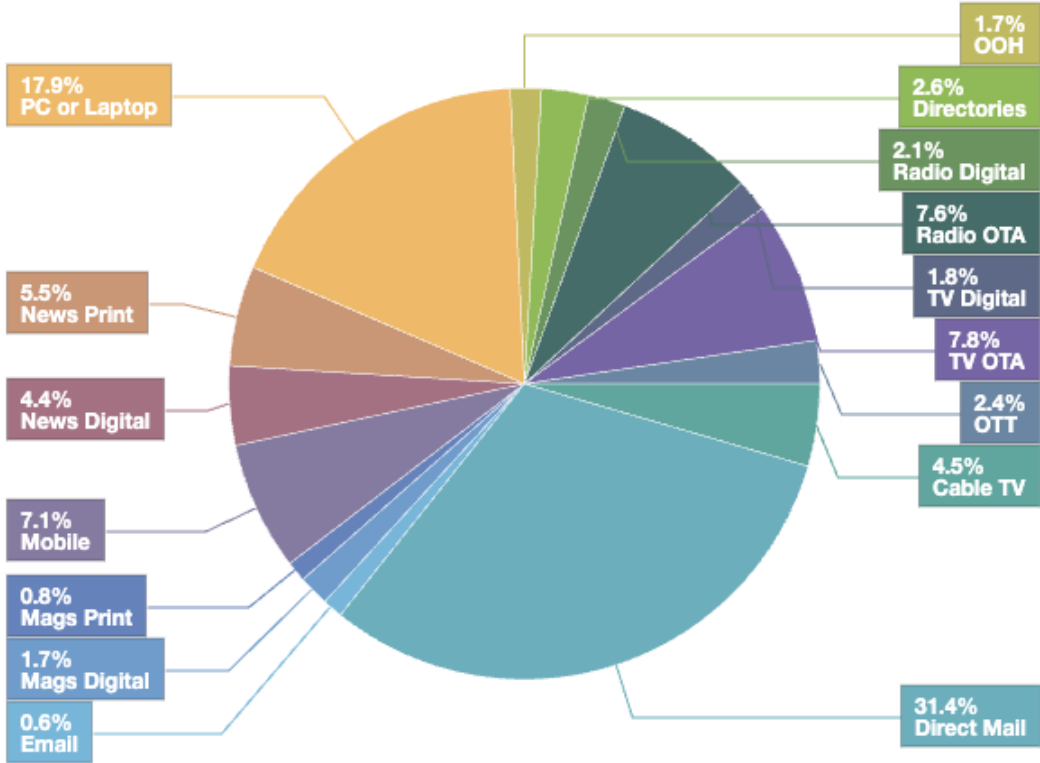
Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.

# Hospitals Spending by Media Channel in 2024



**\$4.6B** Local Advertising Spending in 2024

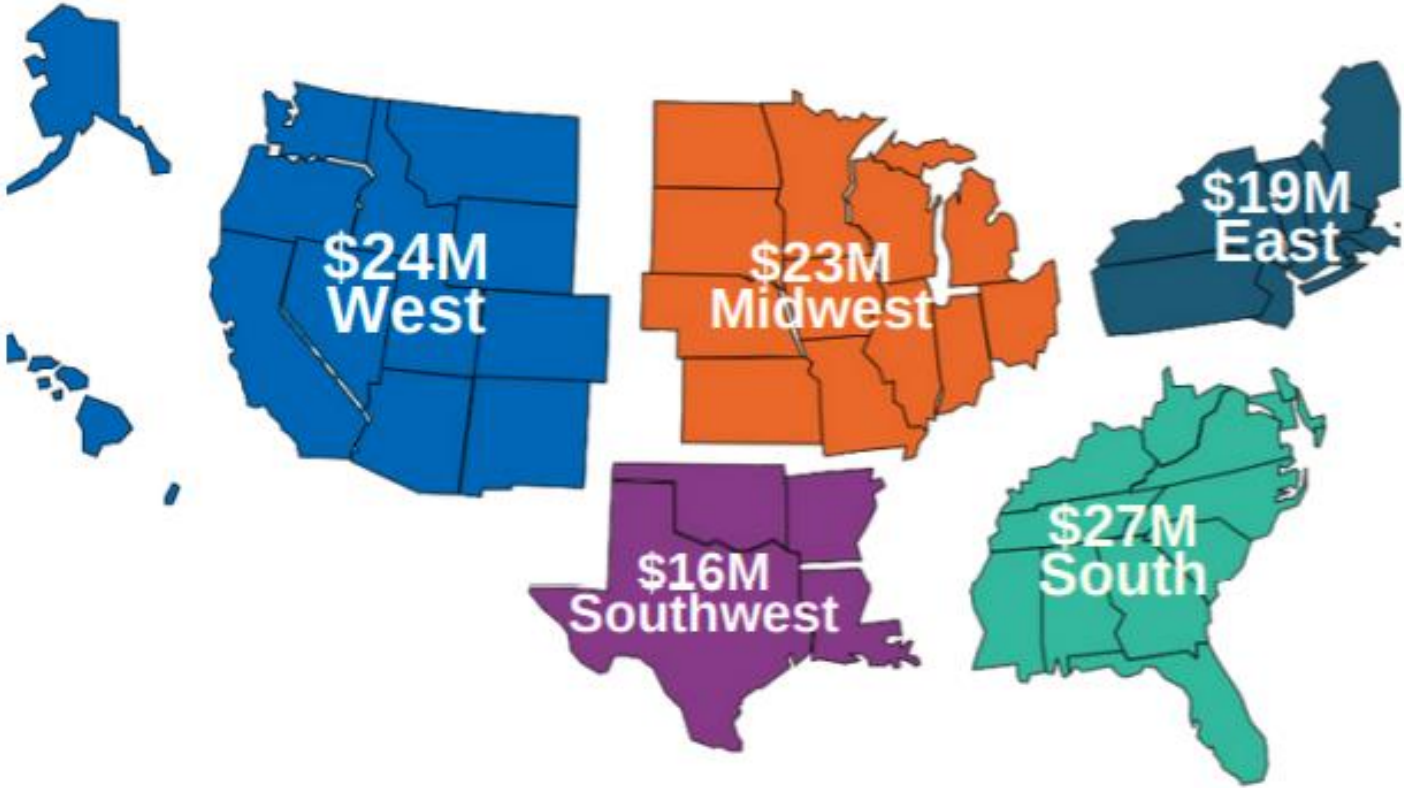
## Local Spending by Hospitals Verticals in 2024



- Cable TV (4.5%)
- Direct Mail (31.4%)
- Email (0.6%)
- Mags Digital (1.7%)
- Mags Print (0.8%)
- Mobile (7.1%)
- News Digital (4.4%)
- News Print (5.5%)
- PC or Laptop (17.9%)
- OOH (1.7%)
- Directories (2.6%)
- Radio Digital (2.1%)
- Radio OTA (7.6%)
- TV Digital (1.8%)
- TV OTA (7.8%)
- OTT (2.4%)

Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.

# Hospitals & CTV Advertising Spending Nationwide in 2024



Hospitals spending will increase 40% on CTV/OTT in 2024 from 2021.



Additional ad budget is shifting to CTV/OTT (+\$33M) from 2023 to 2027.

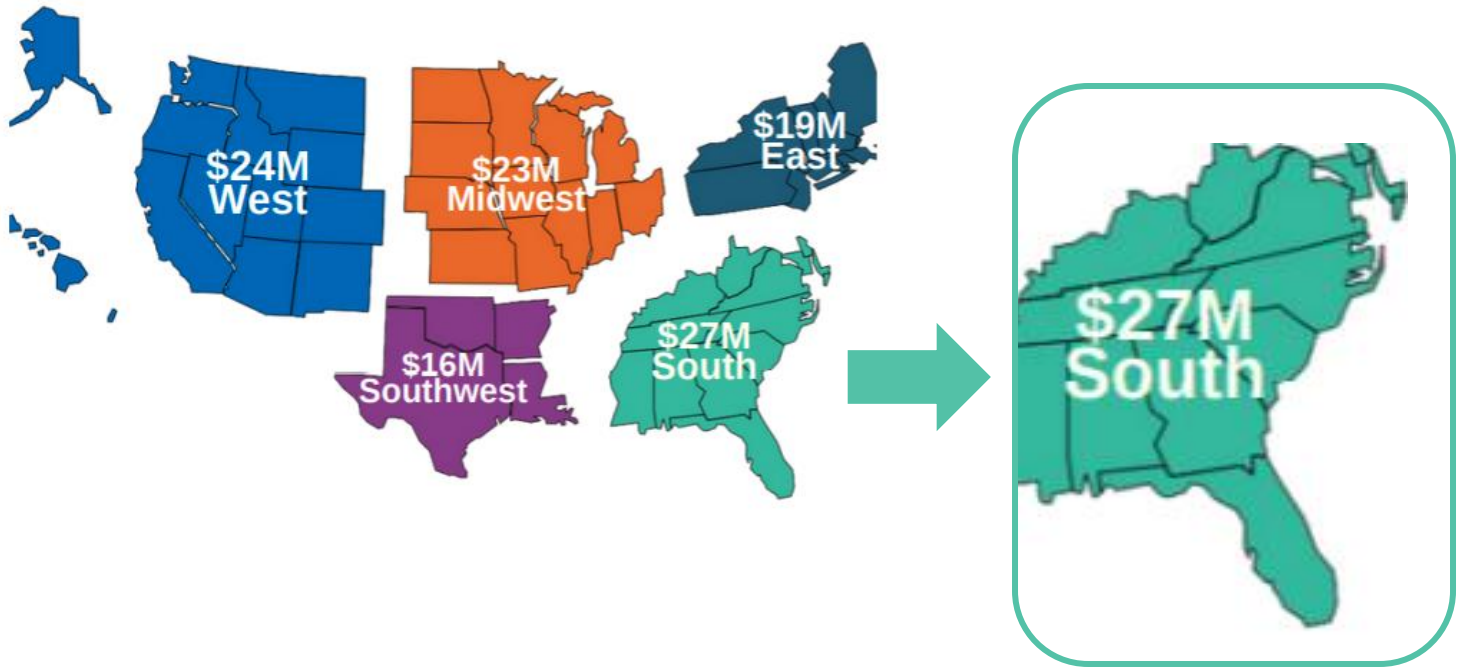


Annual growth shows 7.5% increase on CTV/OTT in local markets for the next 5 years or more.

CTV/OTT advertising is local targeted advertising included on streaming video delivered to TV sets via Internet connections and includes both IP set top boxes that receive signals from digital video ad servers (and widgets on them) as well as USB and HDMI multimedia devices.

Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.

# Hospitals & CTV Advertising Spending in the South in 2024



Hospitals in the South are spending the most on CTV/OTT (\$27M) in 2024.



The South has the largest increase in ad spending 2023-2027 (+\$10M).



The South has the highest annual growth rate of spending on CTV/OTT advertising (+8%).

Source: BIA U.S. Local Advertising Forecast 2024, Issued October 2023.



# In Your Package from BIA...

## Insights from BIA's U.S. Local Advertising Forecast

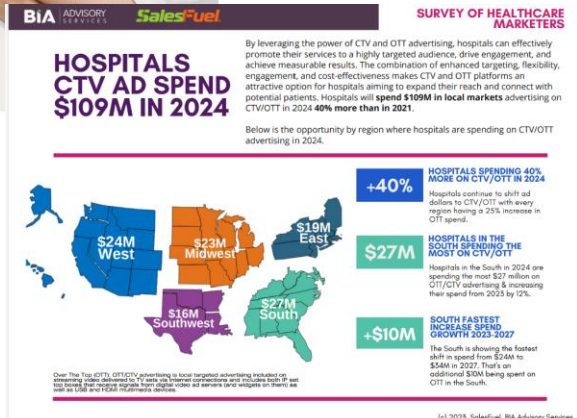
- Healthcare Advertising Report for 2024 to reveal media spend growth, declines and opportunities.
- Hospitals OTT Ad Spend to show how this channel is growing in usage for hospital marketers to advertise their services.
- *Enjoy! Let us know if you have questions or want more forecast details for CTV/OTT (or other media channels.)*

More information about BIA's Vertical Forecasts at <https://bit.ly/BIA-ForecastServices>



Insights Into Local Advertising:

### HEALTHCARE REPORT







# Healthcare Audience Analysis

How Patients Think and Decide

# In Your Package from SalesFuel...

## Insights from 5 AudienceSCAN Profiles from AdMall

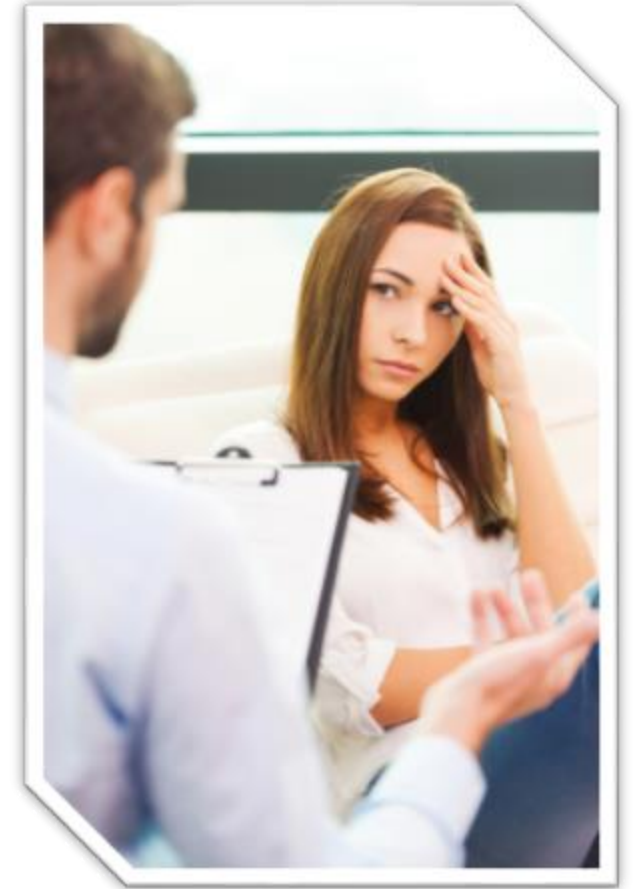
- AudienceSCAN® provides psychographics and digital audience segmentation based on 15,080 U.S. adults online
- SalesFuel's proprietary annual study of online shoppers, digital audiences and consumer behavior in America
- Potential Doctor Switchers  
Potential Dentist Switchers  
Botox / Collagen / Injectable Filler Clients  
Elective Surgery Planners  
Eldercare / Nursing Home Shoppers
- More information at [audiencescan.com](https://audiencescan.com)



# Potential Doctor Switchers

11% of US Adults are considering switching to a different primary care doctor in the next 12 months

- They are **30% more likely** than the average US adult to watch OTT free with commercials than paid subscriptions w/ no commercials.
- **46.1%** will hit the Skip Ad button on online videos ASAP.
- **33% more likely** to believe "ads that follow me from a previous site are creepy."
- They are **60% more likely** to "check a company's blog to evaluate their expertise and subject knowledge."
- **51% more likely** to have annual household income of more than \$150,000



AudienceSCAN, 2023, AdMall.com and SalesFuel.

# Botox/Collagen/Injectable Filler Clients

9.5 Million US Adults plan to pay for these services in the next 12 months

- They are **61% more likely** than the average US adult to respond to a magazine ad (print or digital)
- They are **43% more likely** to respond to commercials on OTT
- **One-third** of them have asked a doctor or pharmacist about a specific medication after seeing an ad for it
- They are **2.5x as likely** to attend a professional conference or motivational seminar in the next 12 months



AudienceSCAN, 2023, AdMall.com and SalesFuel.



# OTT Advertising Responders

33% of US Adults have "taken action" after seeing an OTT ad in the past 30 days

- **39%** watch streaming TV 2+ hours per day on average
- **38%** of them intend to get a new job in the next 12 months
- They are **41% more likely** than the average US adult to be fluent in Spanish
- **66% more likely** to belong to a specialty fitness club (Pilates, spinning, rowing, yoga, Orange Theory, etc.)
- **22% more likely** to watch Pluto TV
- **27% more likely** to be on TikTok



AudienceSCAN, 2023, AdMall.com and SalesFuel.



Where Healthcare  
Marketers Spend  
Their Marketing  
Budgets



Advertising on  
OTT and  
Connected TV  
(CTV)



Internal Factors  
That Affect  
Marketing Efforts

Marketing & AI

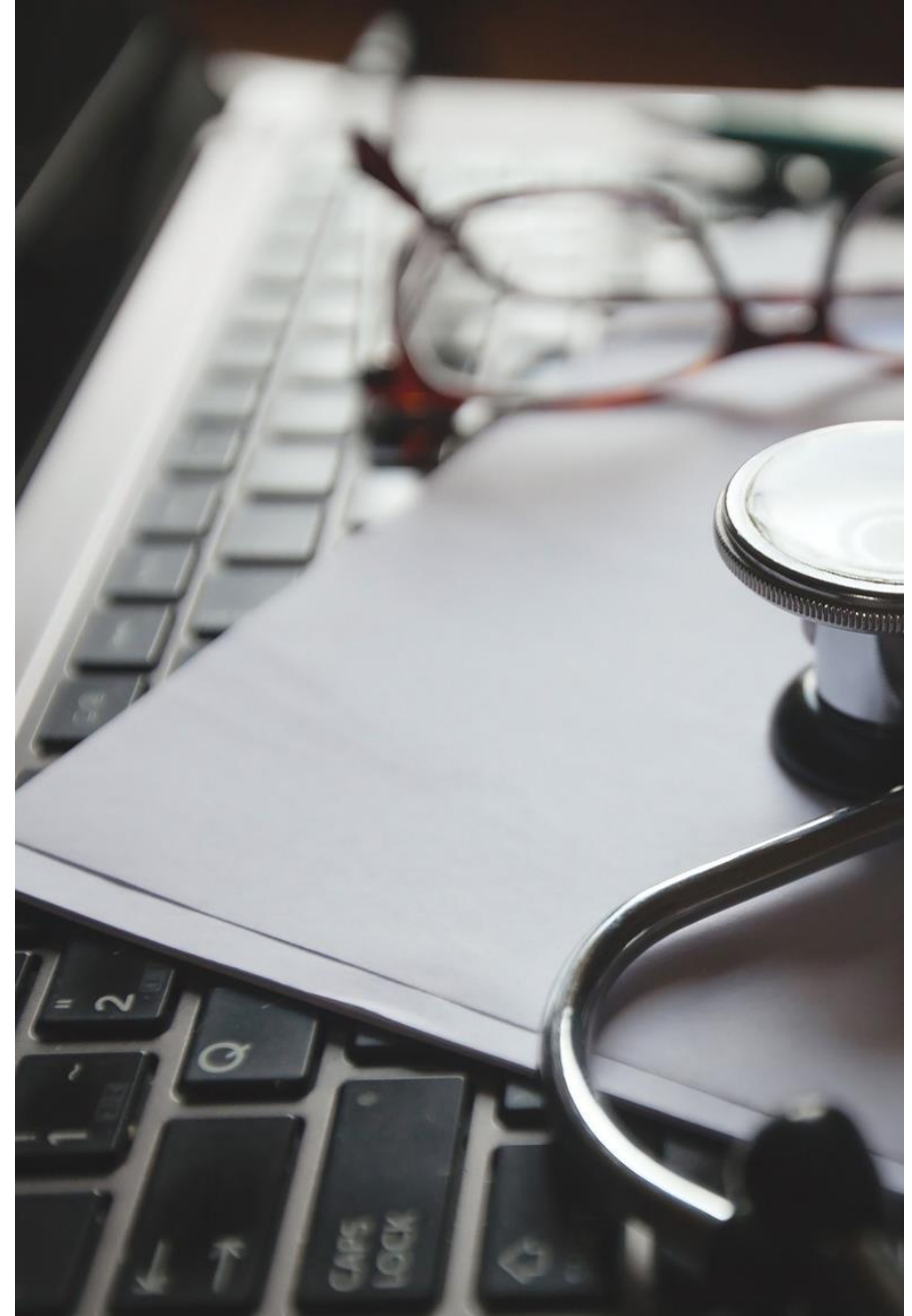


Working With  
Media Sales &  
Marketing  
Companies



# Where are Healthcare Marketers Spending Their Marketing Budgets?

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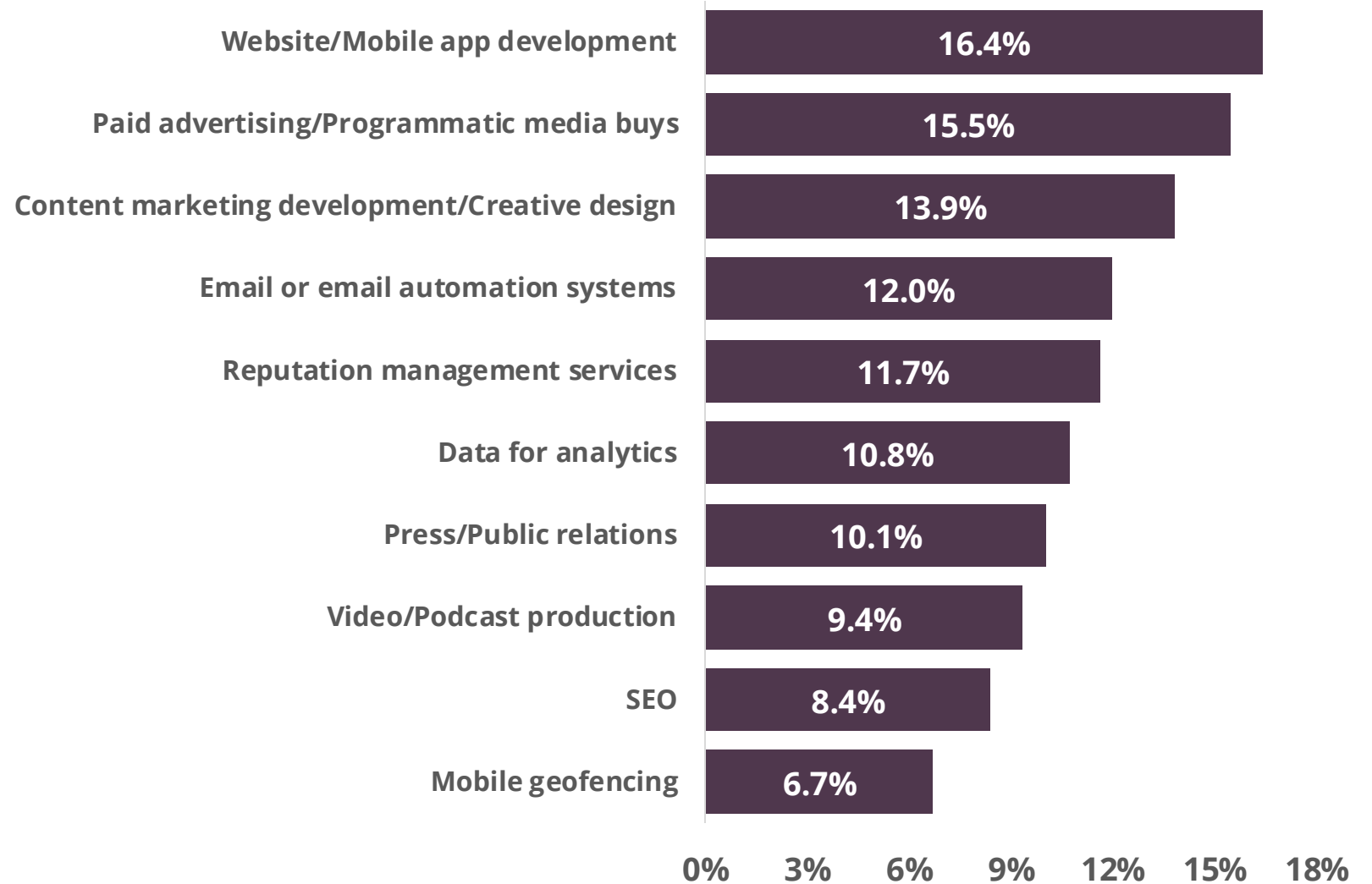




Physicians and Home Healthcare that spend \$50K or less per year tend to invest in website/mobile app development slightly over other services.

Hospitals had a higher percent of budget going to data for analytics.

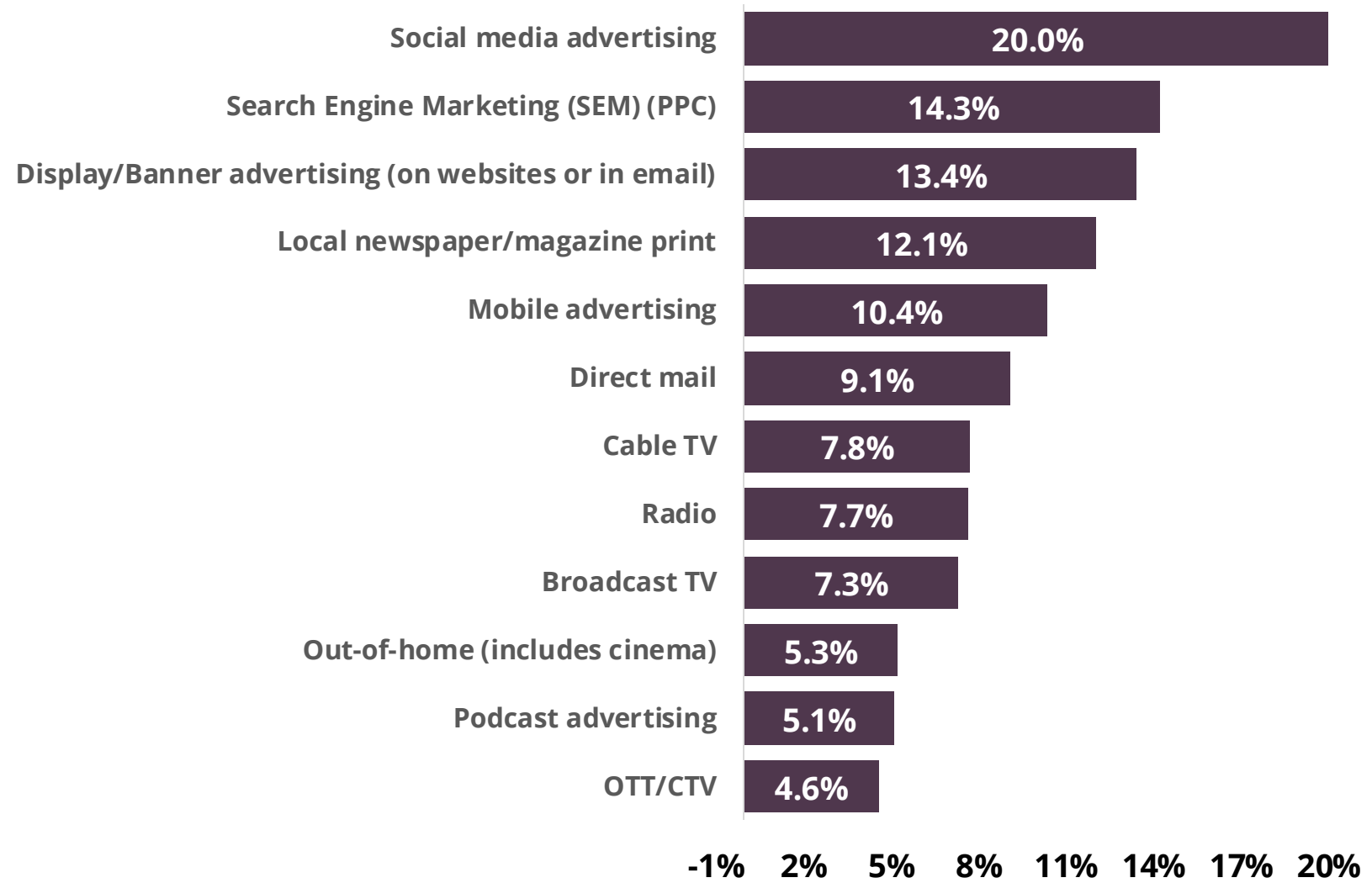
## % of Marketing Budget By Service



Q8) What percentages of your marketing budget will go to the following services? Sample Size 292

## % of Marketing Budget by Media Format

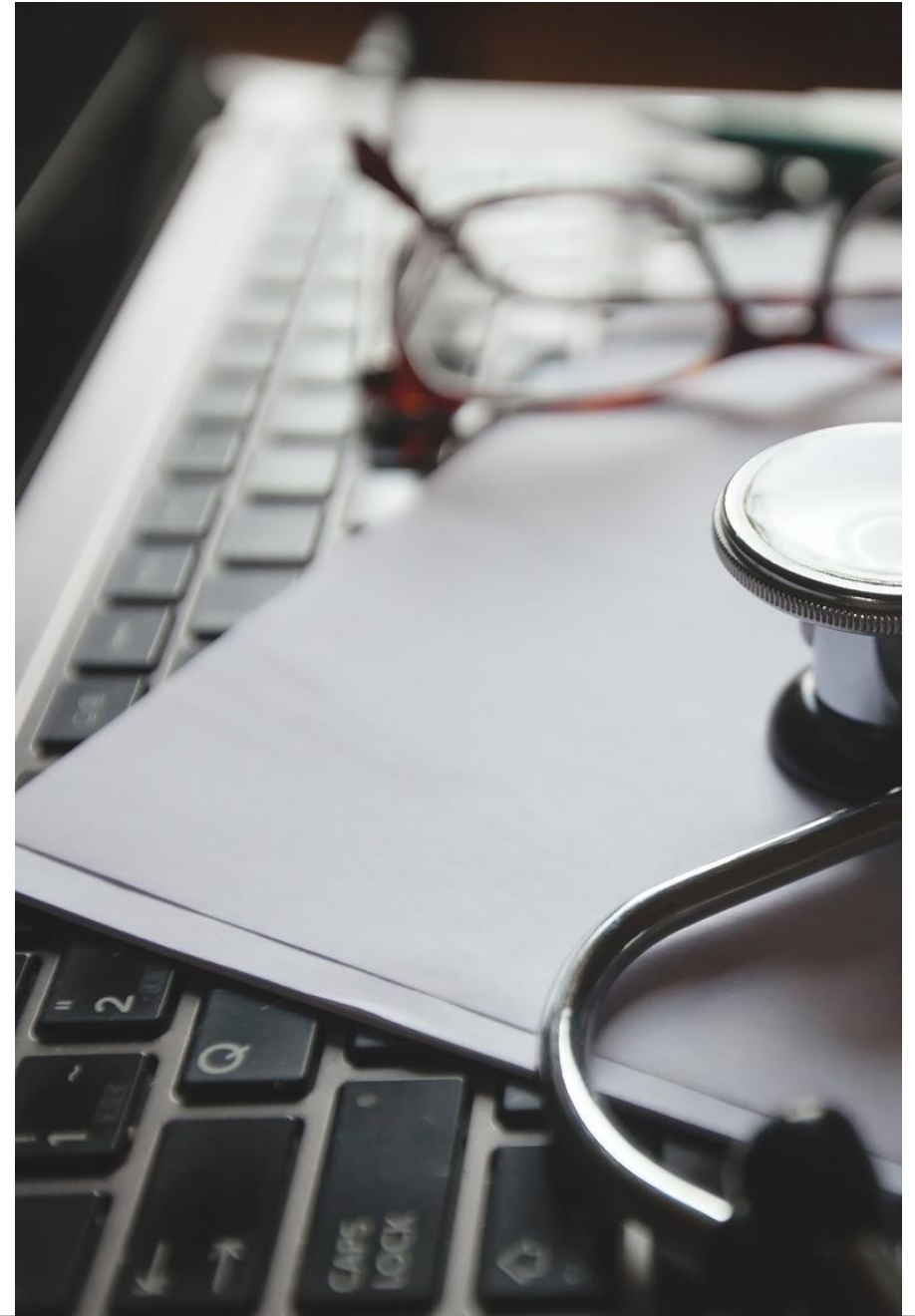
Regardless of their marketing spend budget, healthcare marketers invest mostly in digital formats such as social media advertising, search engine marketing (SEM) and display advertising.



Q9) What percentages of your marketing budget will go to the following media? Sample Size 266

# Where are Healthcare Marketers Advertising on OTT/CTV?

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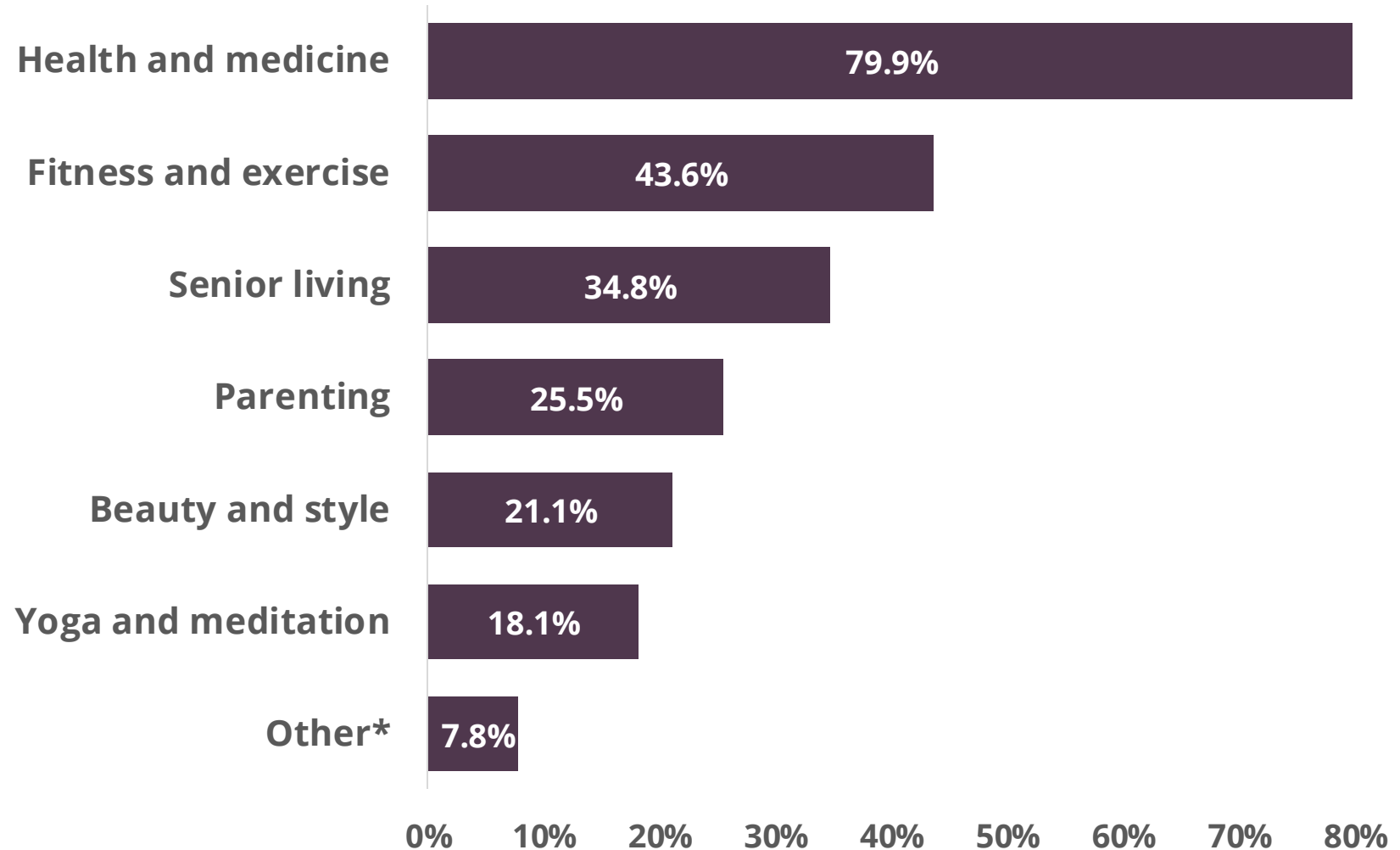


Healthcare marketers that spend over \$500K invest more on OTT genres such as Senior Living, Beauty and Style, Fitness and Exercise, and Yoga and Meditation than others spending less.

Q10) What genre of OTT channels do you buy advertising in?  
(Check all that apply) Sample Size 204

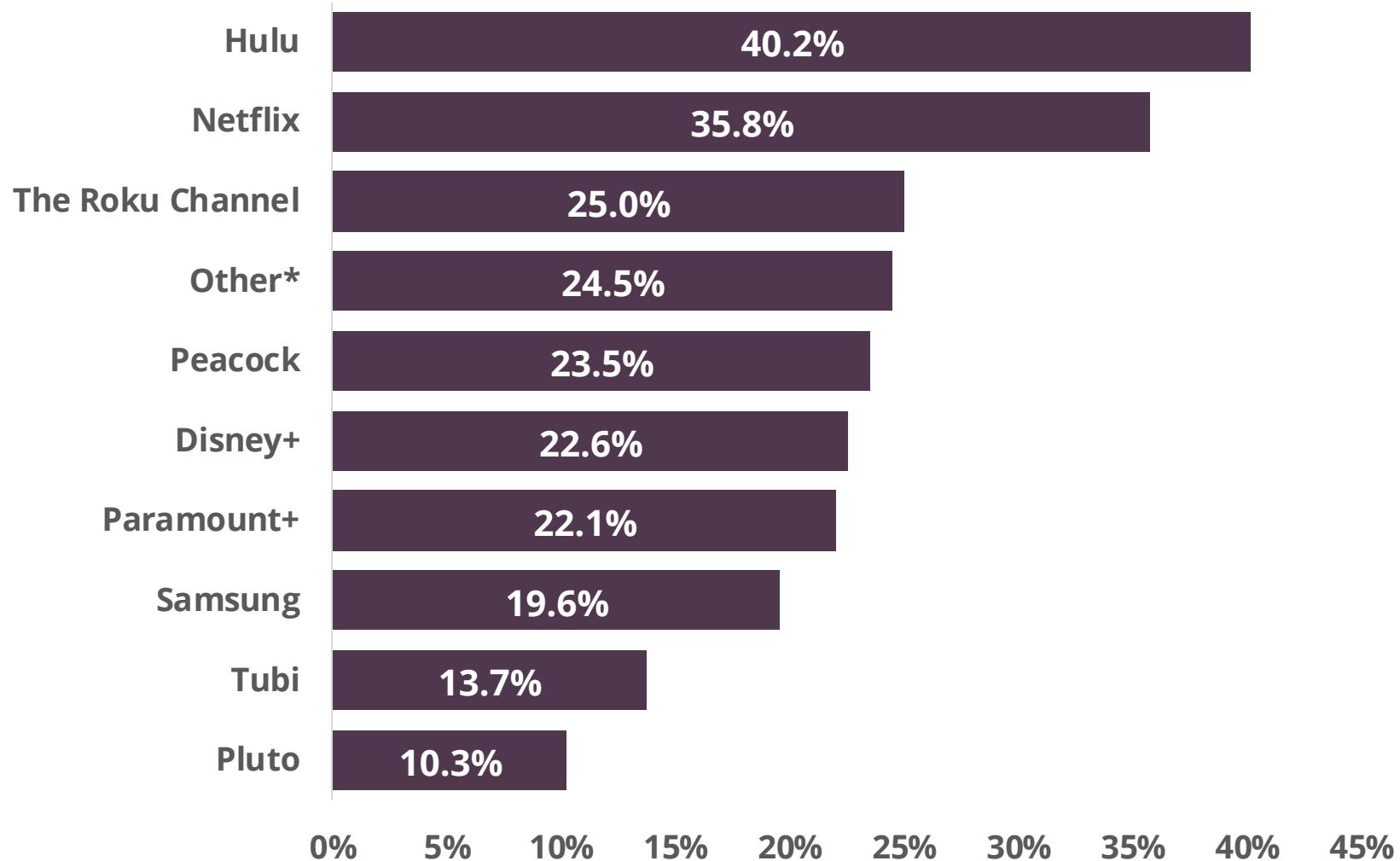
\*Write-ins for "Other" included sports broadcasting, podiatry care, and special needs.

## Genre of OTT Channel Used



Hospitals and marketers with budgets over \$500K leaned toward Hulu and Netflix.

## Streaming Channels Used

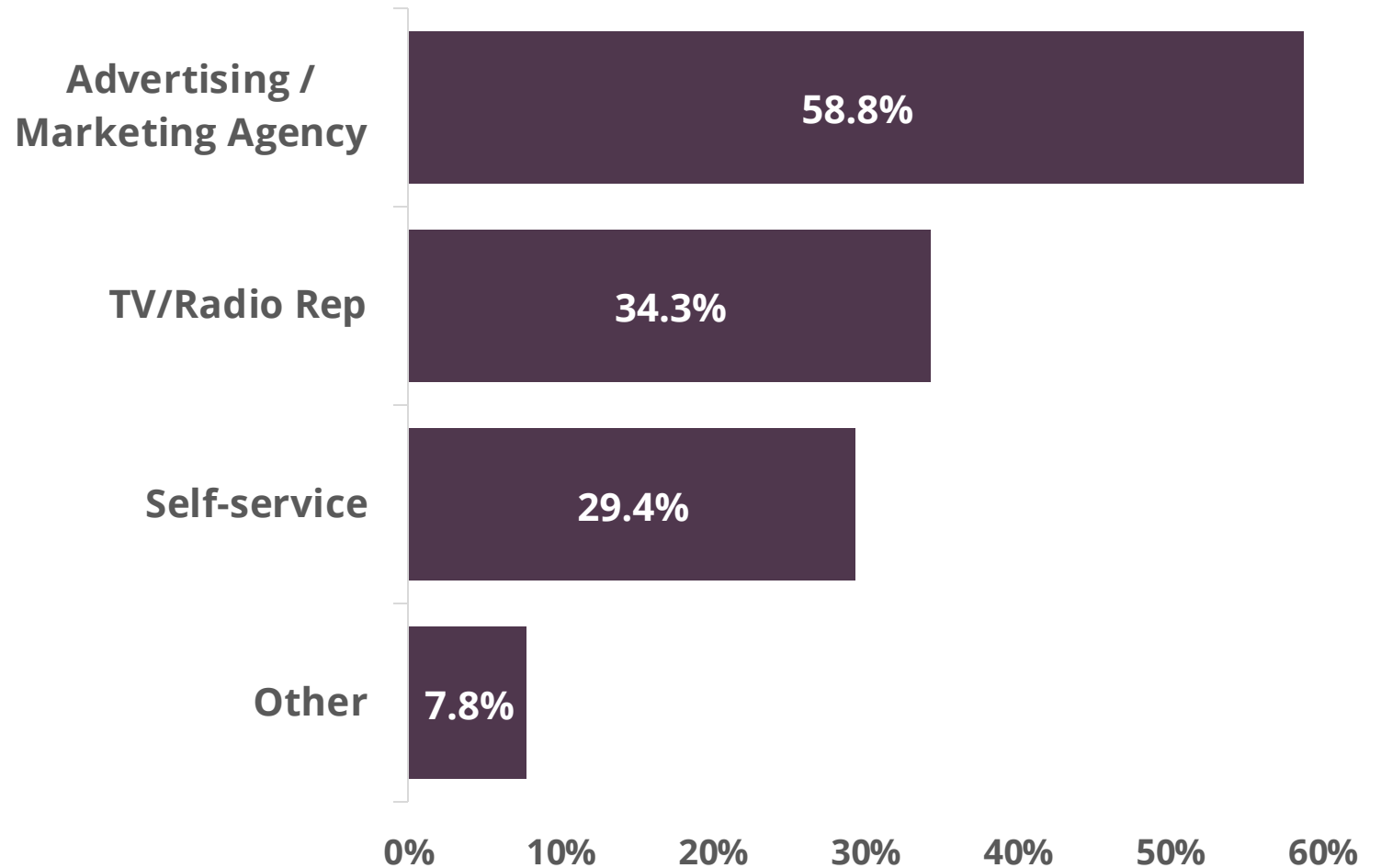


\*Write-ins for "Other" included local TV, YouTube, Spectrum.com, Apple TV, and more.

Q11) Where are you placing your OTT/CTV advertising? (Check all that apply) Sample Size 204

Marketers at Hospitals were far more likely to place OTT/CTV ads through a local TV/radio reps than doctors' offices (47.2% vs 20.0%).

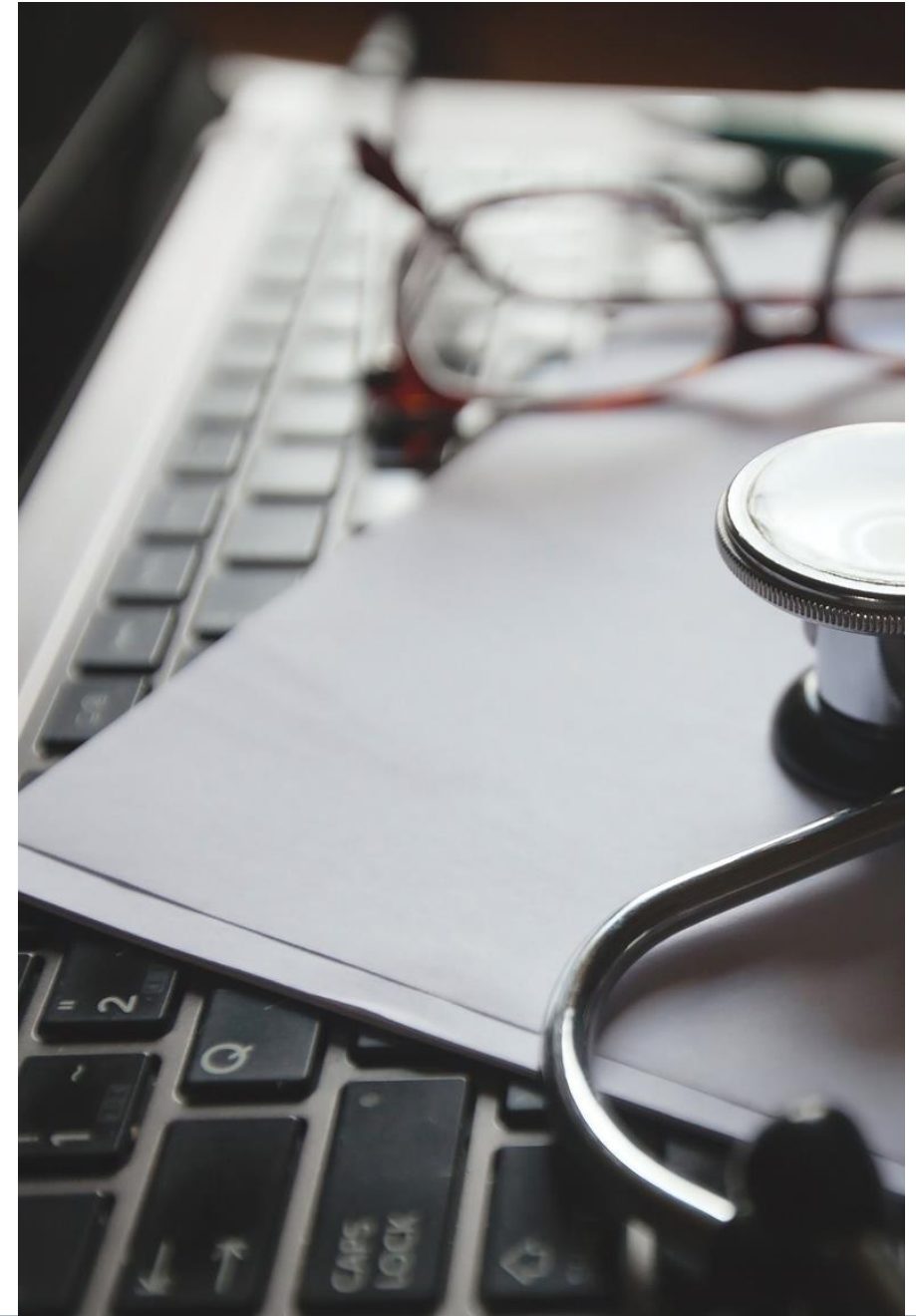
## How OTT/CTV Ads are Placed



Q12) How are you placing your OTT ads? (Check all that apply)  
Sample Size 204

# What Internal Factors are Affecting Marketing for Healthcare Marketers?

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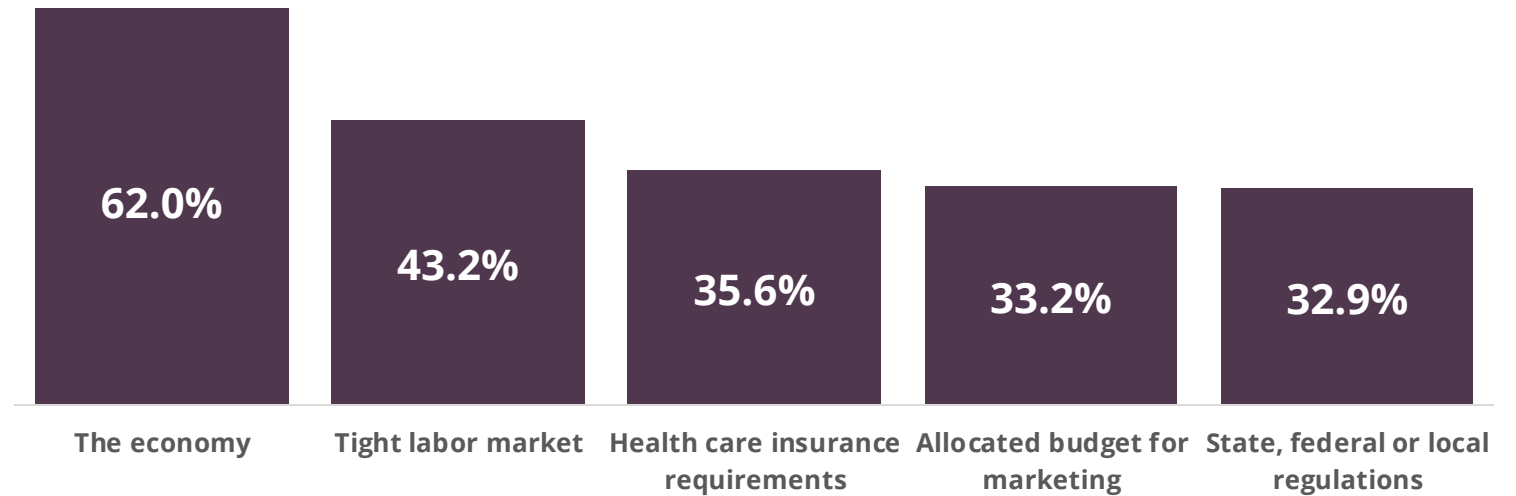


Across the board, the economy impacted healthcare marketers the most.

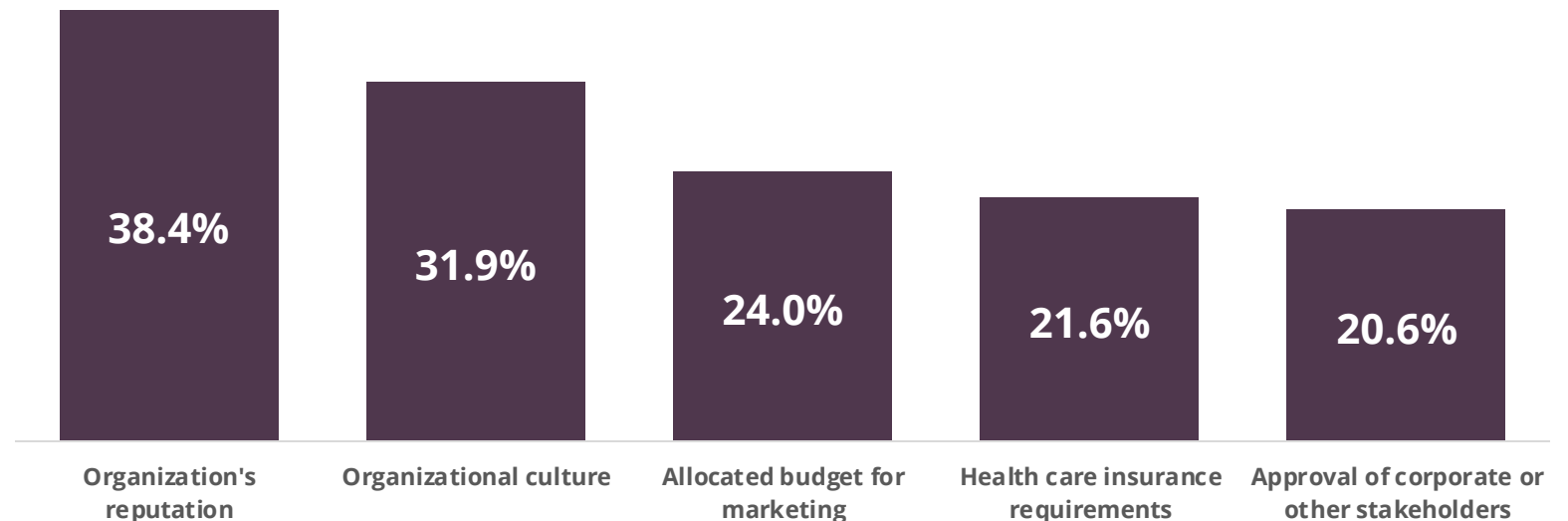
Brand reputation was stronger than budgets for making it easier to market.

*Q15) In the past year, these factors have impacted our marketing initiatives as follows. Sample Size 292*

## Top Factors That Make Marketing Efforts Harder

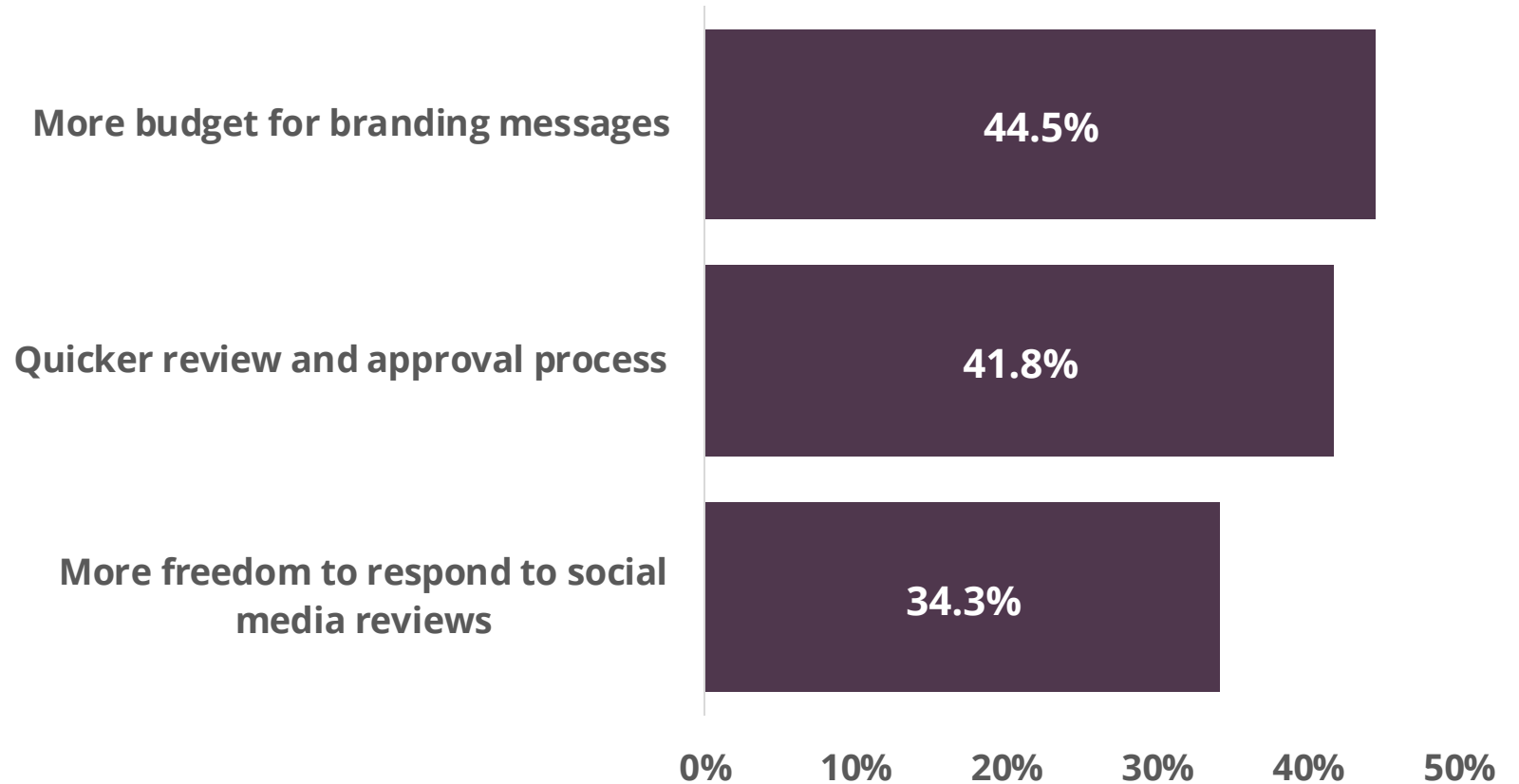


## Top Factors That Make Marketing Efforts Easier



## Top 3 Factors That Could Make Marketing Issues More Effective

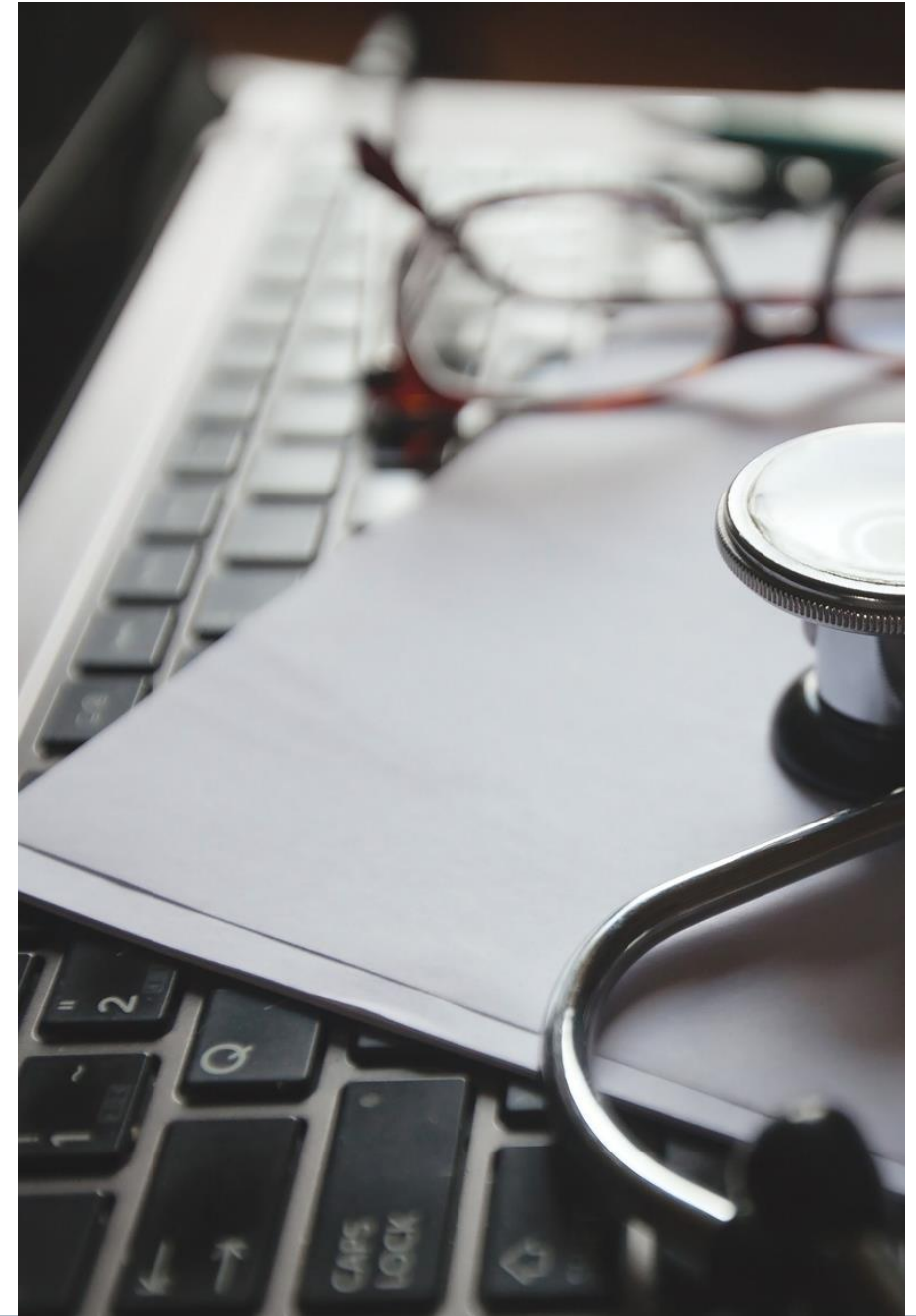
Hospitals were more interested in quicker review and approval processes, while a bigger budget was the top pick for doctors' offices, home health care and senior services.



Q16) Our marketing initiatives could be more effective if my organization provided me with...? (Select all options that apply) Sample Size 292

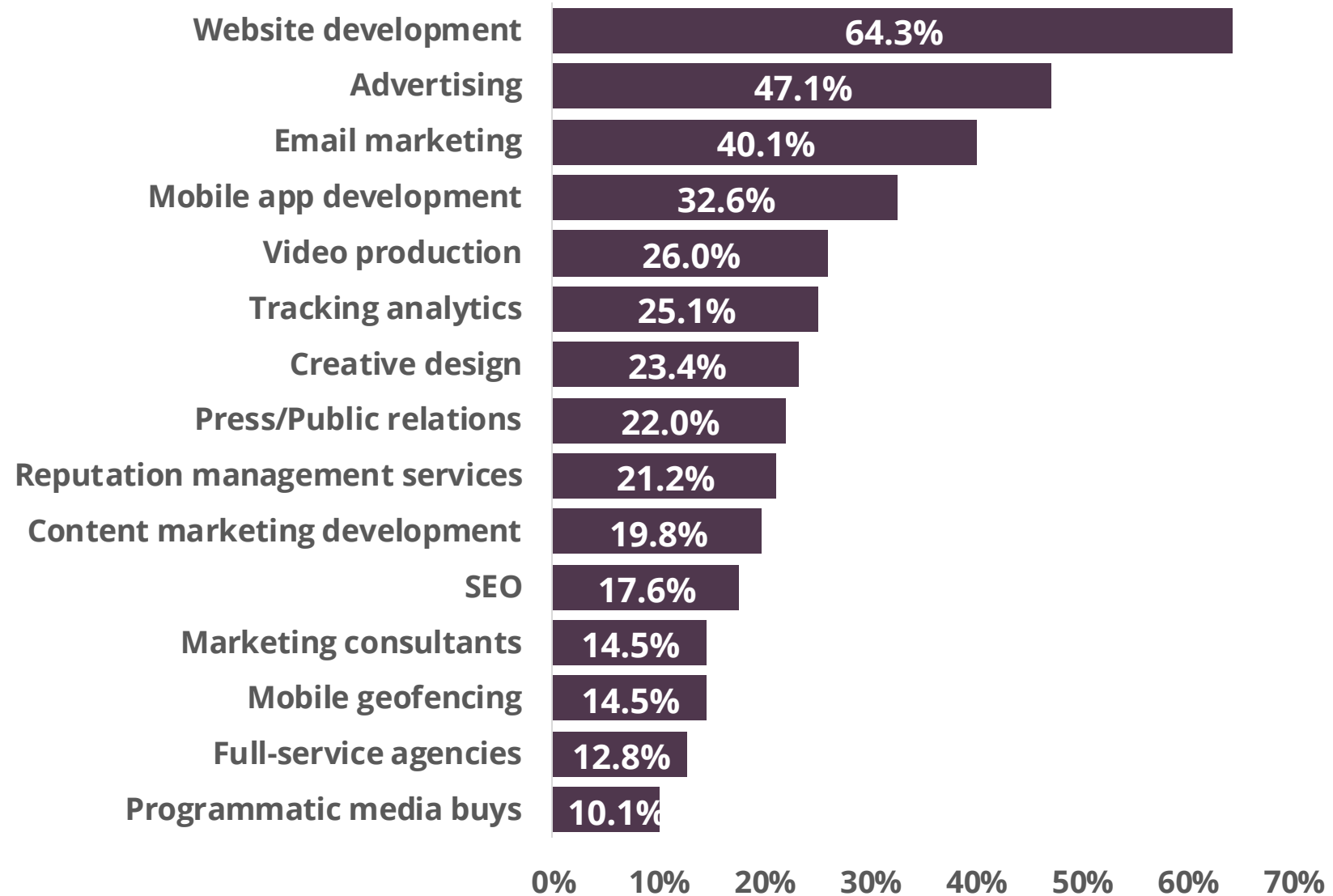
# How do Healthcare Marketers Work with Media Sales and Marketing Services Companies?

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# Types of Outside Services and Contractors Used

Healthcare marketers outsource several services. Website development and advertising were the top two choices across budget size and facility type.

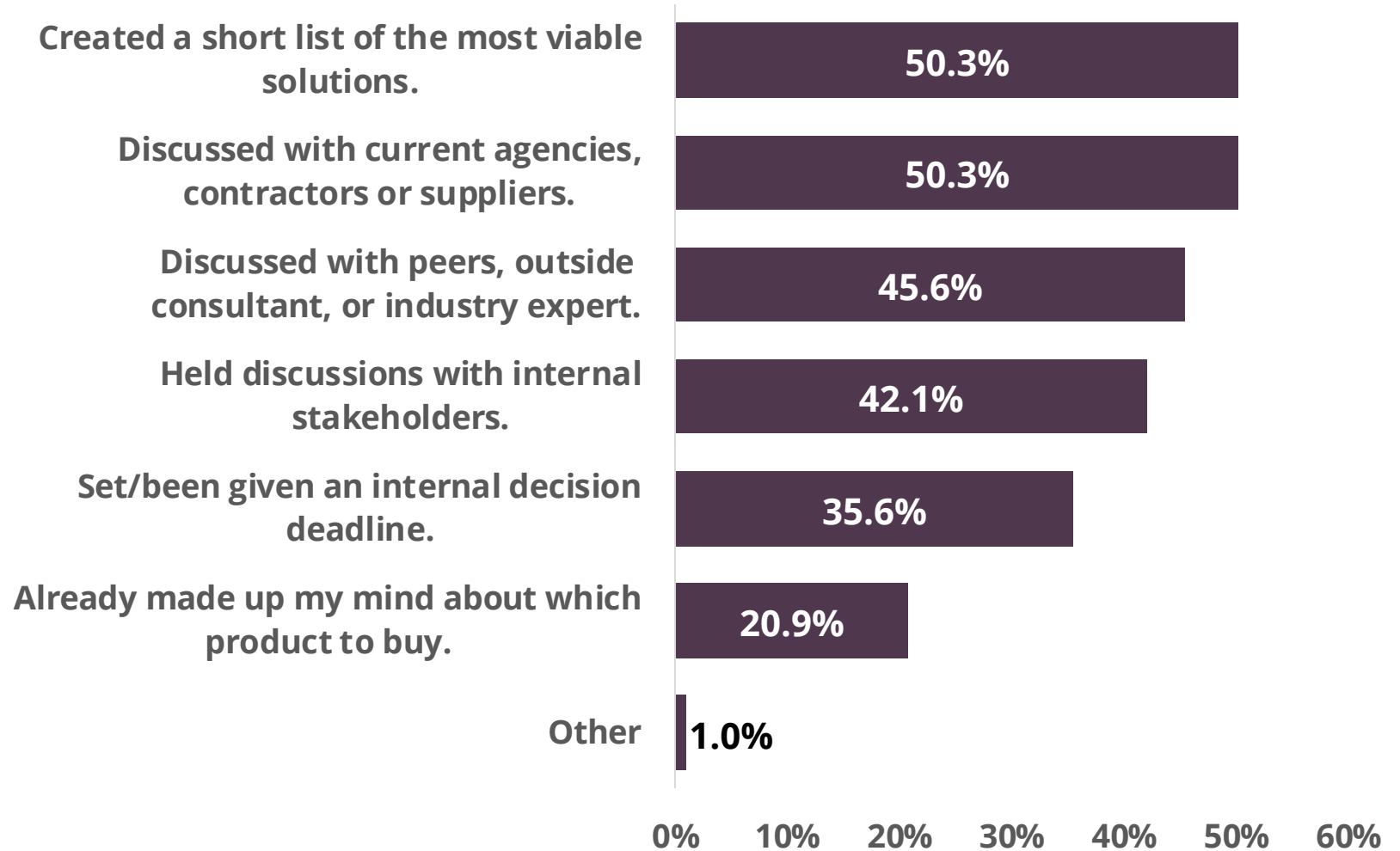


Q14) What types of outside services and contractors do you use? (Check all that apply) Sample Size 227

Hospitals and were most likely to discuss problems/goals with internal stakeholders.

Healthcare marketers with lower budgets were more likely to create a short list of most viable solutions before reaching out.

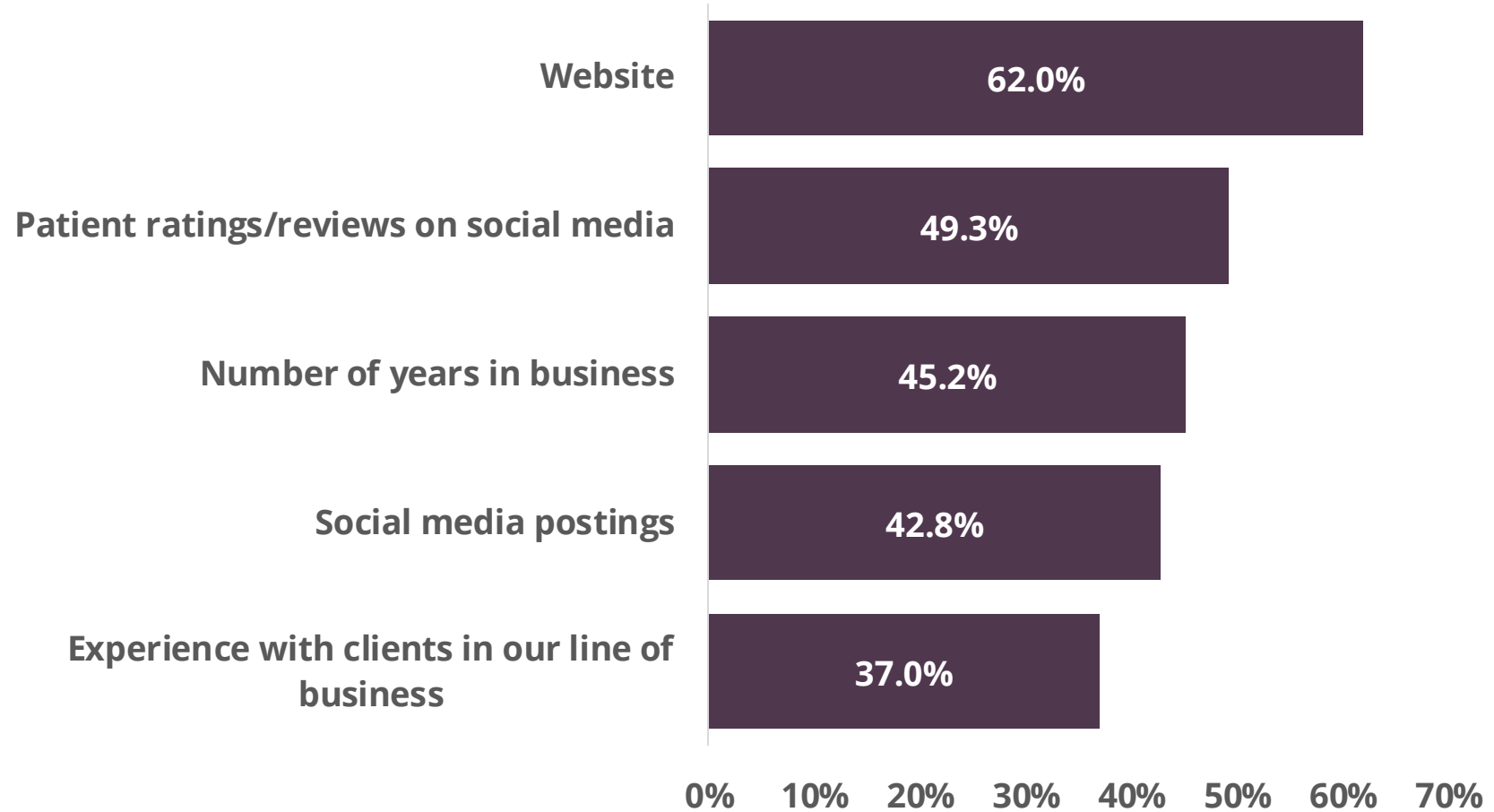
## Activities Completed Before Reaching Out to Media and Sales Companies



Q17) Before reaching out to media sales and services companies, I have usually first completed these activities. (Check all that apply) Sample Size 292

# Top 5 Things to Check When Researching Media Sales and Marketing Services Companies Online

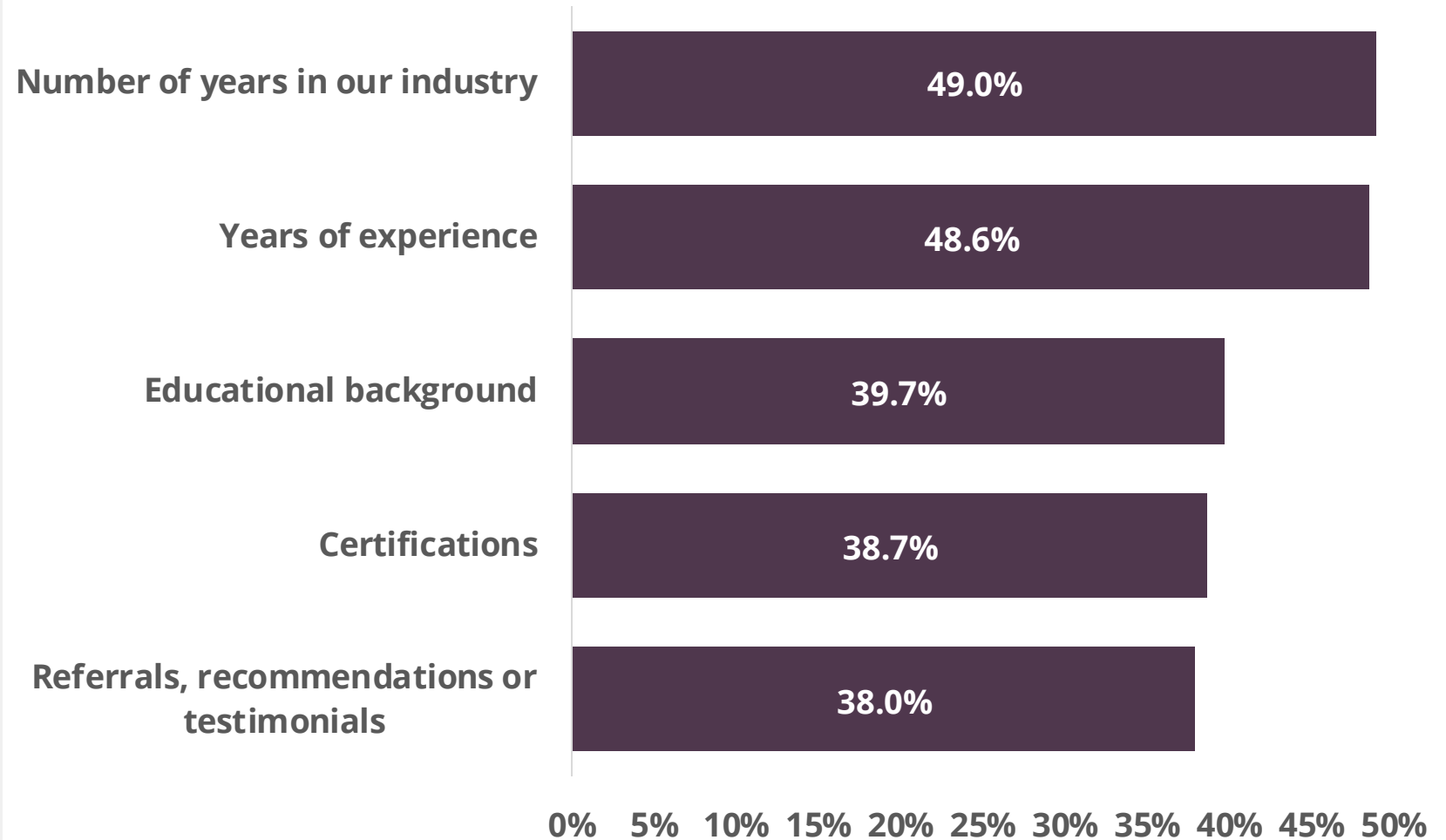
Looking at the company's website was the top source for research across the board.



Q18) When researching media sales and marketing services companies online, I usually look at the following aspects. (Check all that apply) Sample Size 292

## Top Factors to Check When Researching a Salesperson

Marketers with budgets over \$500K were more interested in a salesperson's years in the industry. Marketers with lower budgets were more interested in years of experience.

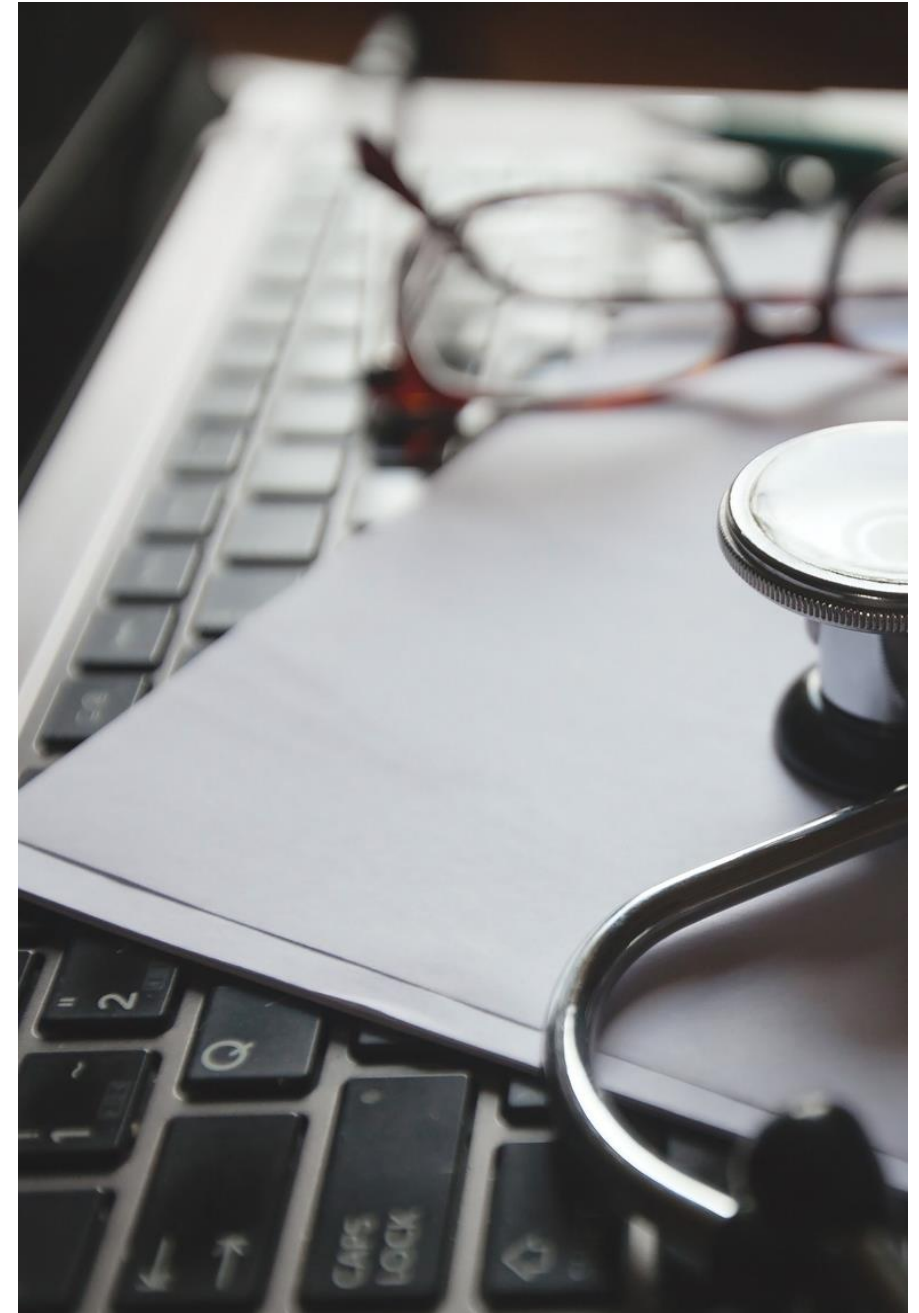


Q19) When researching a salesperson before I meet with them, I usually look for... (Check all that apply) Sample Size 292



# How does Healthcare Marketers Use AI- Artificial Intelligence for Marketing?

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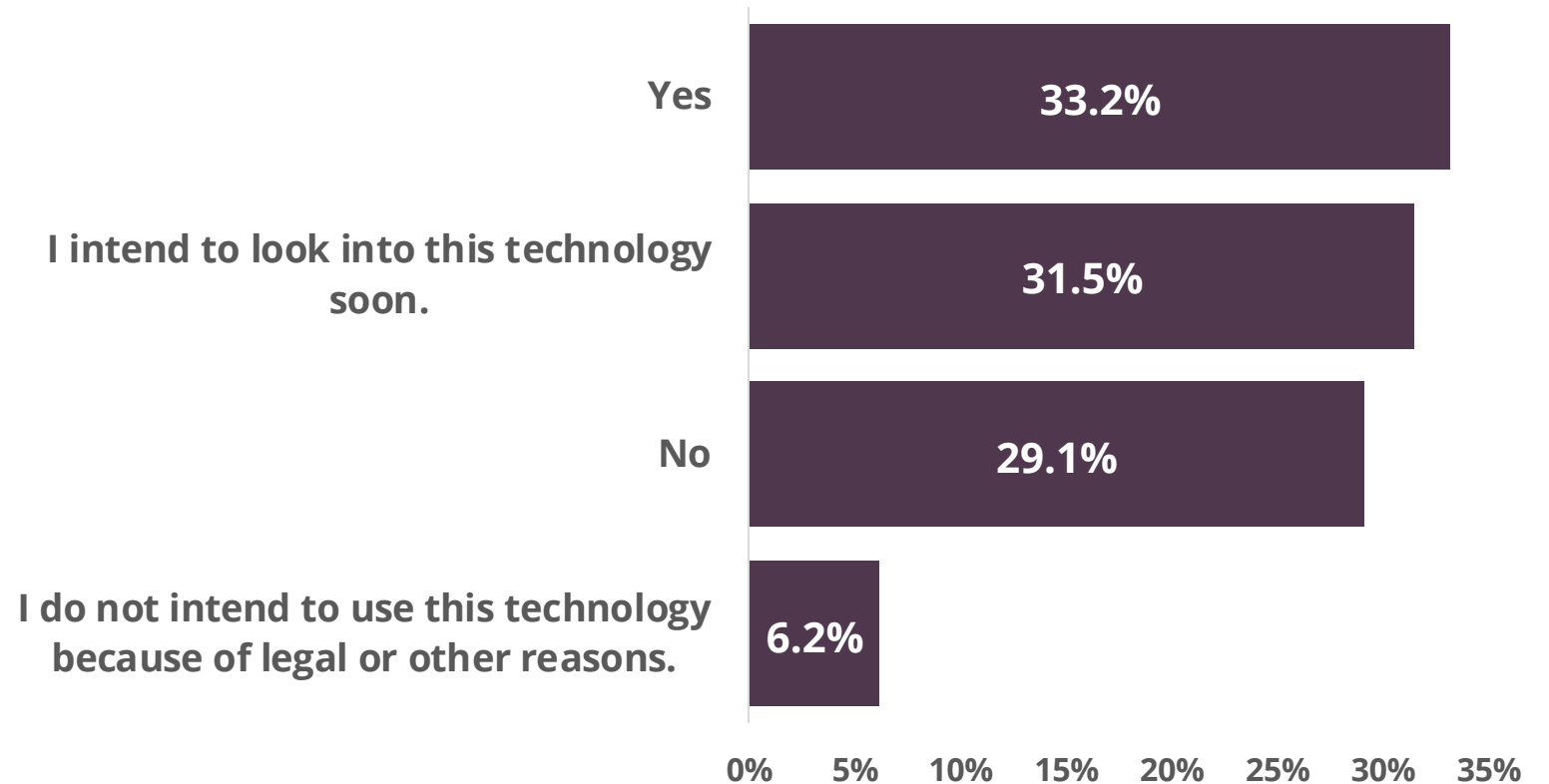
**AI  
Usefulness  
for  
marketing  
rated  
6.8 out of 10**

**Based on Healthcare  
marketers who used  
AI tools ranking**

*Q23) I have explored using AI services such as ChatGPT, Persado, Jasper, or Lex to help create content. Sample Size 292*

*Q25) Have you found AI tools useful (Drag the slider to indicate your answer ranging from 0 to 10) Sample Size 97*

## Have Healthcare Marketers Explored Using AI Services to Help Create Content?



# Key Insights



**Healthcare marketers felt the economy's impact, yet brand and reputation made it easier to market.** Their marketing budgets are spent on multiple marketing activities as well as paid advertising.

- Mobile App/Website development was most popular activity especially with healthcare marketers spending \$50K or less.
- Of the respondents most of the paid advertising spend goes to search and display ads.

**CTV/OTT ads are being bought on multiple properties and genres.** Marketers are far more likely to place CTV/OTT ads through a local TV or Radio sales than direct or with an agency.

- Marketers that spend over \$500K place ads more on Senior Living, Beauty/Style, Fitness/Exercise, and Yoga/Meditation genres.
- Marketers that spend over \$500K place ads mostly on Hulu and Netflix.

**AI is part of their activities with 33% of healthcare marketers have used AI for marketing and another 32% planning on it in the future.**

- Healthcare marketers who used AI tools ranked its usefulness at 6.8 out of 10.

# Key Insights



## **Healthcare marketers face internal organizational issues when marketing.**

- Hospitals want quicker review and approval processes, and doctor's offices, home healthcare and senior services want bigger marketing budgets.

## **Healthcare marketers outsource several marketing services.**

- Website development and advertising are the most popular services to outsource.

## **Prior to reaching out to a salesperson or agency for marketing assistance healthcare marketers do different planning.**

- The majority look at the agency or ad company's website.
- Facilities with lower budgets were more likely to create a short list of most viable solutions before reaching out.
- *Hospitals and those with \$500K+ ad budget* were most likely to discuss problems/goals with internal stakeholders before reaching out.
- *Marketers with budgets over \$500K* were more interested in a salesperson's years in their industry, while marketers with lower budgets were more interested in their years of experience.

Contact us! We are here to help!



- [salesfuel.com](http://salesfuel.com)
- [astrong@salesfuel.com](mailto:astrong@salesfuel.com)
- 614-794-0500



- [Advantage@bia.com](mailto:Advantage@bia.com)
- [sales@bia.com](mailto:sales@bia.com)
- 703-818-2425



The logo for SalesFuel, with 'Sales' in green and 'Fuel' in orange, separated by a double vertical line. A registered trademark symbol (®) is at the end.

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HOW AMERICA THINKS,  
SHOPS AND DECIDES™

# More AudienceSCAN Profiles

for Healthcare Marketers are available in AdMall

Acupuncture Patients  
Addiction Treatment Patients  
Allergist Patients  
Better Sleep Seekers  
Cannabis Dispensary Customers  
Cardiologist Patients  
Caregiver for Elderly/Disabled Family Member  
CBD Product/Oil Users or Buyers  
Chiropractic Patients  
Chronic Pain Sufferers  
Cosmetic Surgery Patients (Invasive)  
Cosmetic Surgery Patients (Non-Invasive)  
Cryotherapy Users  
Dental Procedure Patients

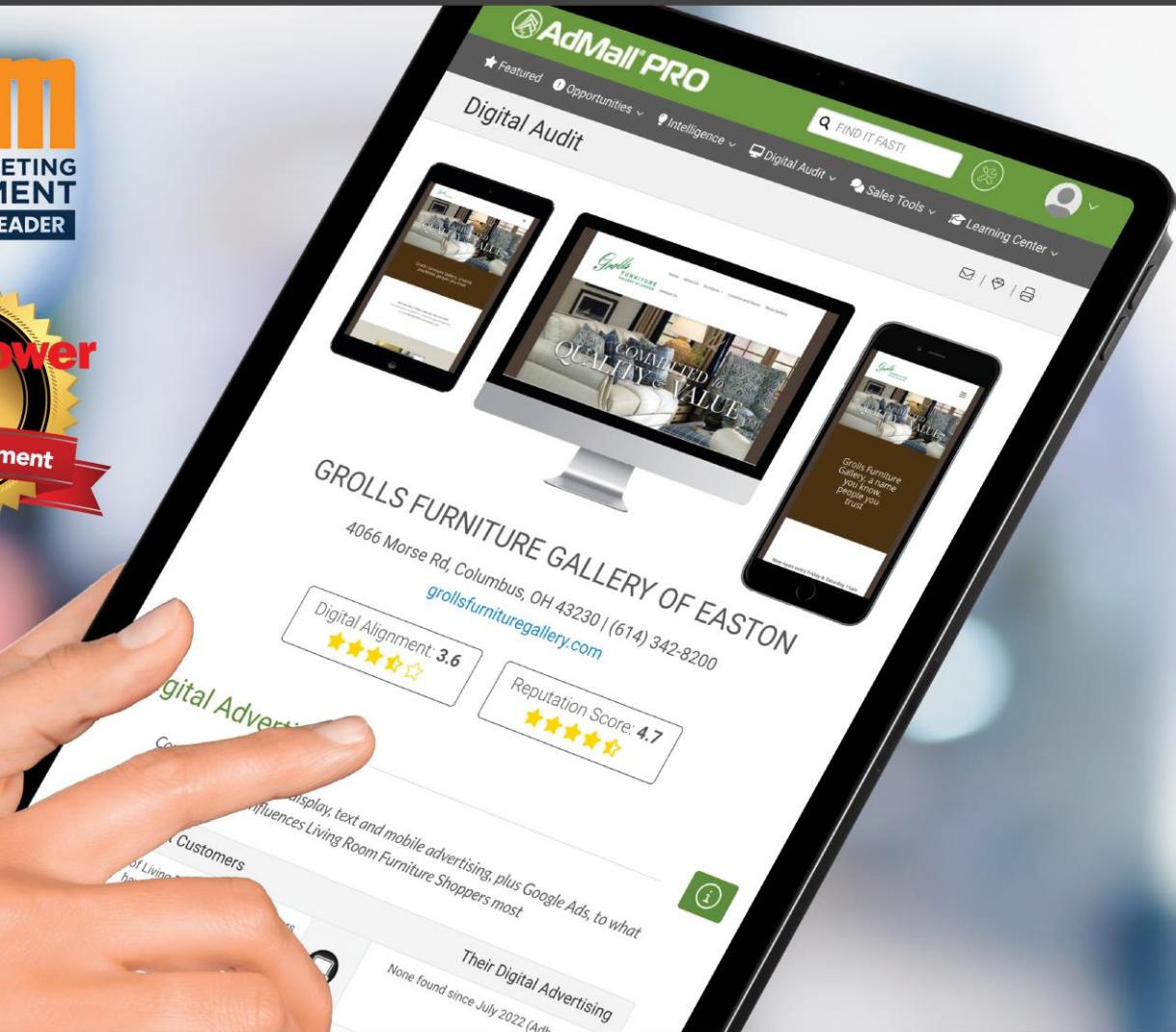
Dermatologist Patients  
Diabetics  
Diet / Weight Loss Services Shoppers  
Eye Care Patients  
Family Planning Patients  
Family Starters  
Fertility / Infertility Treatment Patients  
Hearing Aid Shoppers  
Hormone Replacement Therapy Patients  
IV Drip (fluids) Users  
Keto Diet Followers  
LASIK Surgery Shoppers  
Neurologist Patients  
Oncologist Patients  
Orthopedic Patients

Pediatrician Patients  
Pharma Ad Responders  
Potential Health Insurance Switchers  
Psychologist/Counseling Patients  
Potential Optometrist Switchers  
Potential Pediatrician Switchers  
Prescription Eyeglass / Sunglass Shoppers  
Psychologist/Counseling Patients  
Routine Health Care Services Customers  
Urgent Care Patients  
Urologist Patients  
Weight Loss Surgery Patients





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**LOCAL MARKET  
DEMOGRAPHICS**

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**BIA Advisory Services is the trusted advisor for local video, audio, digital and publishing companies.**

We cover the local media advertising marketplace and technologies to deliver:

- Proprietary advertising forecasts
- Insights and analytics
- Strategic consulting
- Valuations



**We combine EXPERTISE and DATA to give our clients actionable INSIGHTS and RECOMMENDATIONS to make grounded strategic and financial decisions.**



# 96 Local Vertical Forecasts Available from BIA

Scan the QR code or visit <https://bit.ly/BIA-ForecastServices>  
Questions? Reach out to our team at [ADVANTAGE@BIA.COM](mailto:ADVANTAGE@BIA.COM).

**Automotive**

- Automotive Repair Services
- Gas Stations & Petroleum
- Other Motor Vehicle Dealers
- Tier 1 - Automotive Manufacturers
- Tier 2 - Automobile Dealers Association
- Tier 3 - New Car Dealers
- Tier 3 - Used Car Dealers
- Tires, Automotive Parts, and Accessories Stores

**Education**

- Business and Trade Education
- Colleges & Universities
- Educational Support Services
- Other Schools and Instruction

**Financial/Insurance Advertising**

- Auto & Direct Property Insurance
- Commercial Banking
- Consumer Lending & Mortgages
- Credit Cards
- Direct Health and Medical Insurance Carriers
- Direct Life Insurance Carriers
- Insurance Agencies and Brokerages
- Investment & Retirement Advice
- Saving/Credit Institutions and Other Loan Services

**Health**

- Health and Personal Care Stores
- Hospitals
- Nursing and Residential Care Facilities
- Offices of Optometrists
- Offices of Physicians/Dentists/Chiropractors
- Personal Care Services
- Pharmaceutical and Medicine Mfg.
- Veterinary Services

**Leisure/Recreation Advertising**

- Airport, Cruises, and Other Travel
- Amusement Parks and Arcades
- Fitness and Recreational Sports
- Gambling and Lotteries
- Motion Picture and Video Exhibition
- Museums, Historical Sites, and Landmarks
- Online Gambling
- Other Amusement and Recreation
- Performing Arts Companies
- Spectator Sports
- Tourism and Travel Services
- Traveler Accommodation: Hotels-Motels

**General Services**

- Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- Advertising, Printing, and Related Services
- Design and Related Services
- Event Planning Services
- Freight Brokerage, Freight Forwarding, and Technical Services
- Gov't/Pol/Rel'g Advertising
- Government, Unions & Other Organizations
- Political
- Religious & Charitable



**Media**

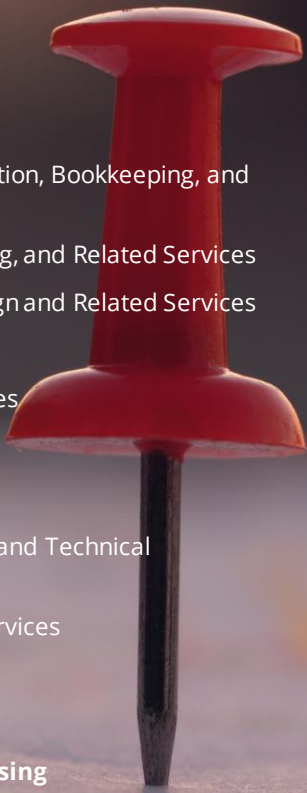
- Cable and Other Subscription Programming
- Internet Publishers
- Newspapers & Print Publishers
- Radio Stations and Networks
- Television Broadcasting and Networks

**Restaurant/Food Advertising**

- Beer and Wine, and Liquor Stores
- Convenience Stores
- Full-Service Restaurants and Bars
- Quick Service Restaurants/Fast Foods
- Special Restaurants, Food & Beverage Stores
- Supermarkets and Other Grocery Stores

**Technology Advertising**

- Wireless Telecommunications Carriers
- Cable and Satellite Delivery
- Internet Service Providers
- Other Telecommunications
- Wired/Bundled Services



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- 614-794-0500



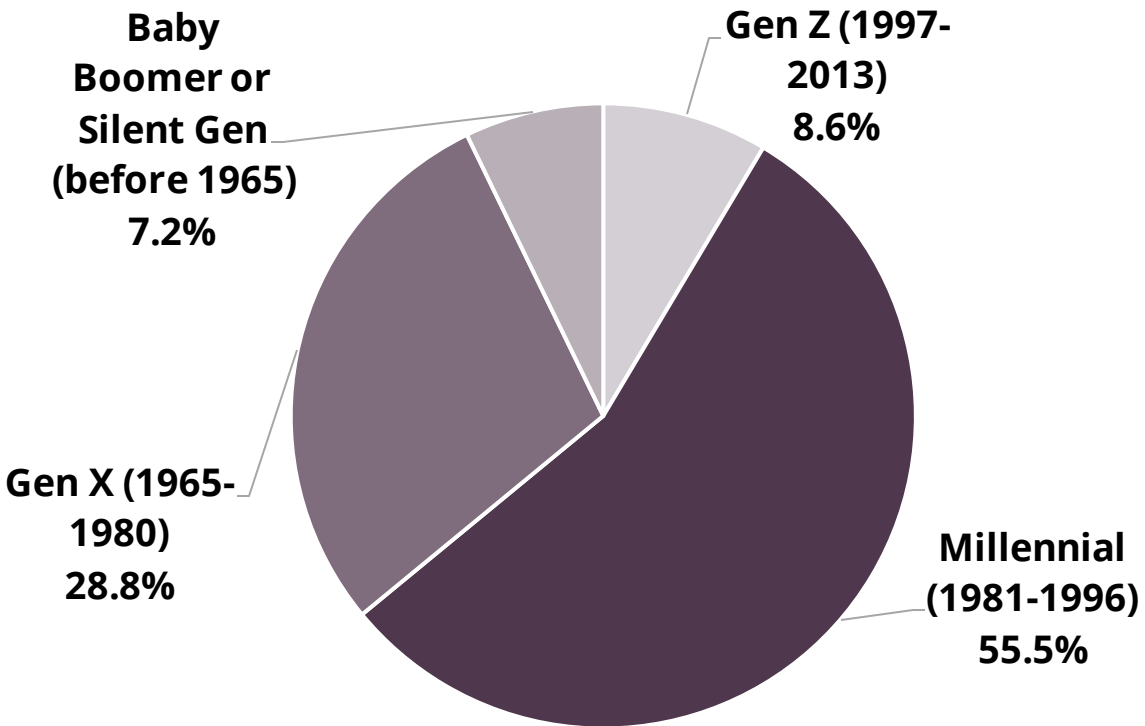
- [Advantage@bia.com](mailto:Advantage@bia.com)
- [sales@bia.com](mailto:sales@bia.com)
- 703-818-2425

# Firmographics About the Study

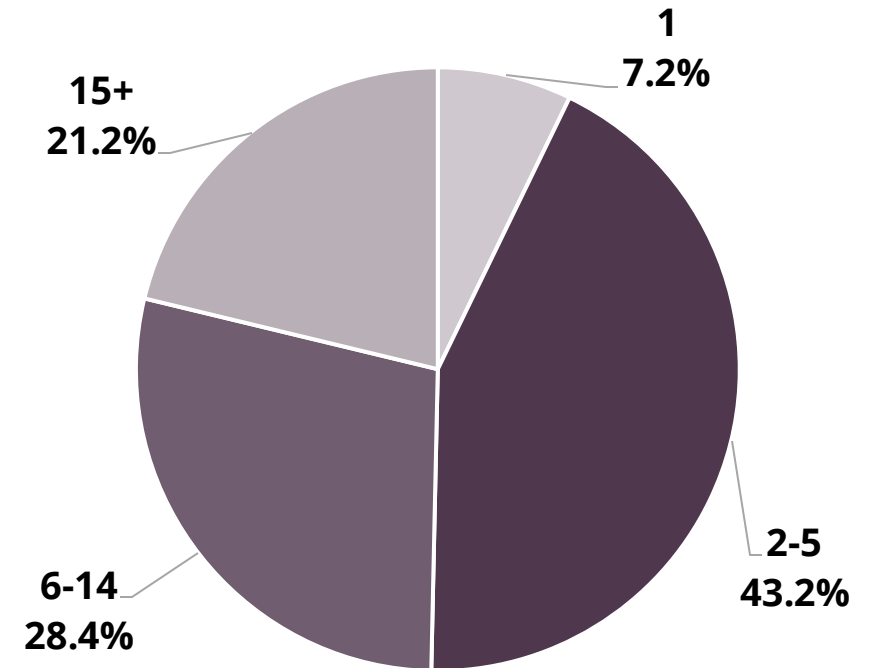


# Firmographics

## Respondent's Generation



## # of Employees on Marketing Team



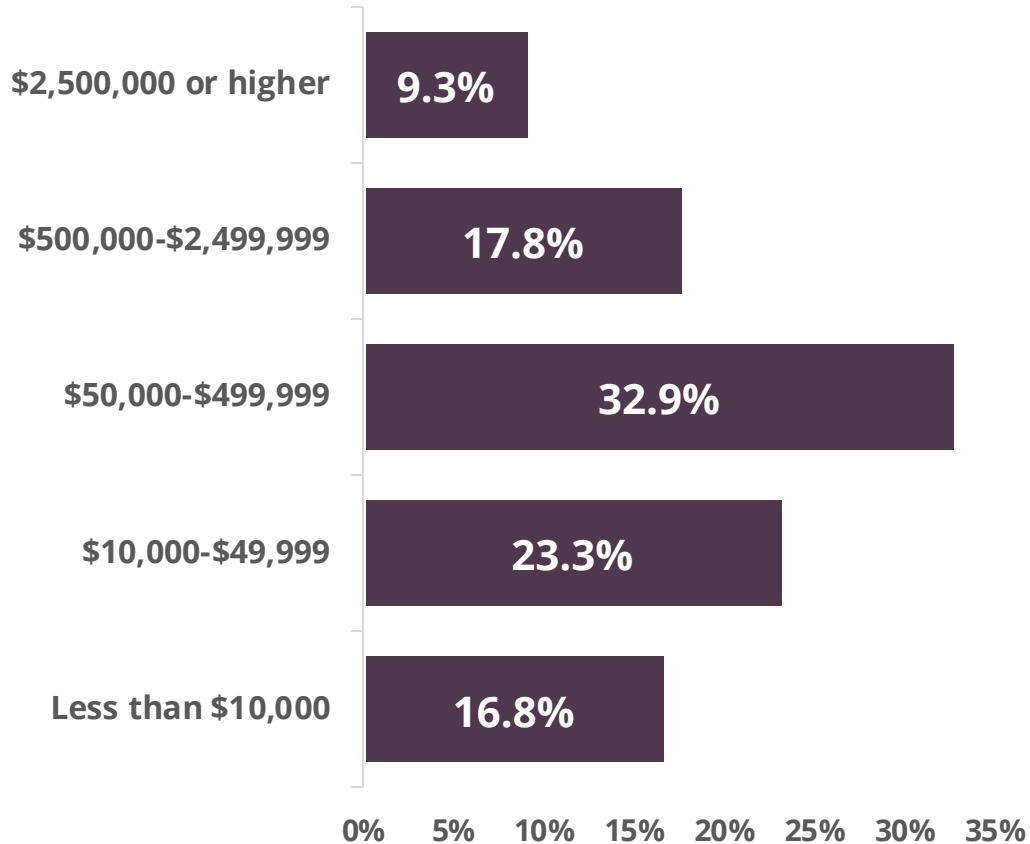
Q4) Which generation do you belong to?

Q7) How many employees are on your marketing team? (Do not include contractors.)

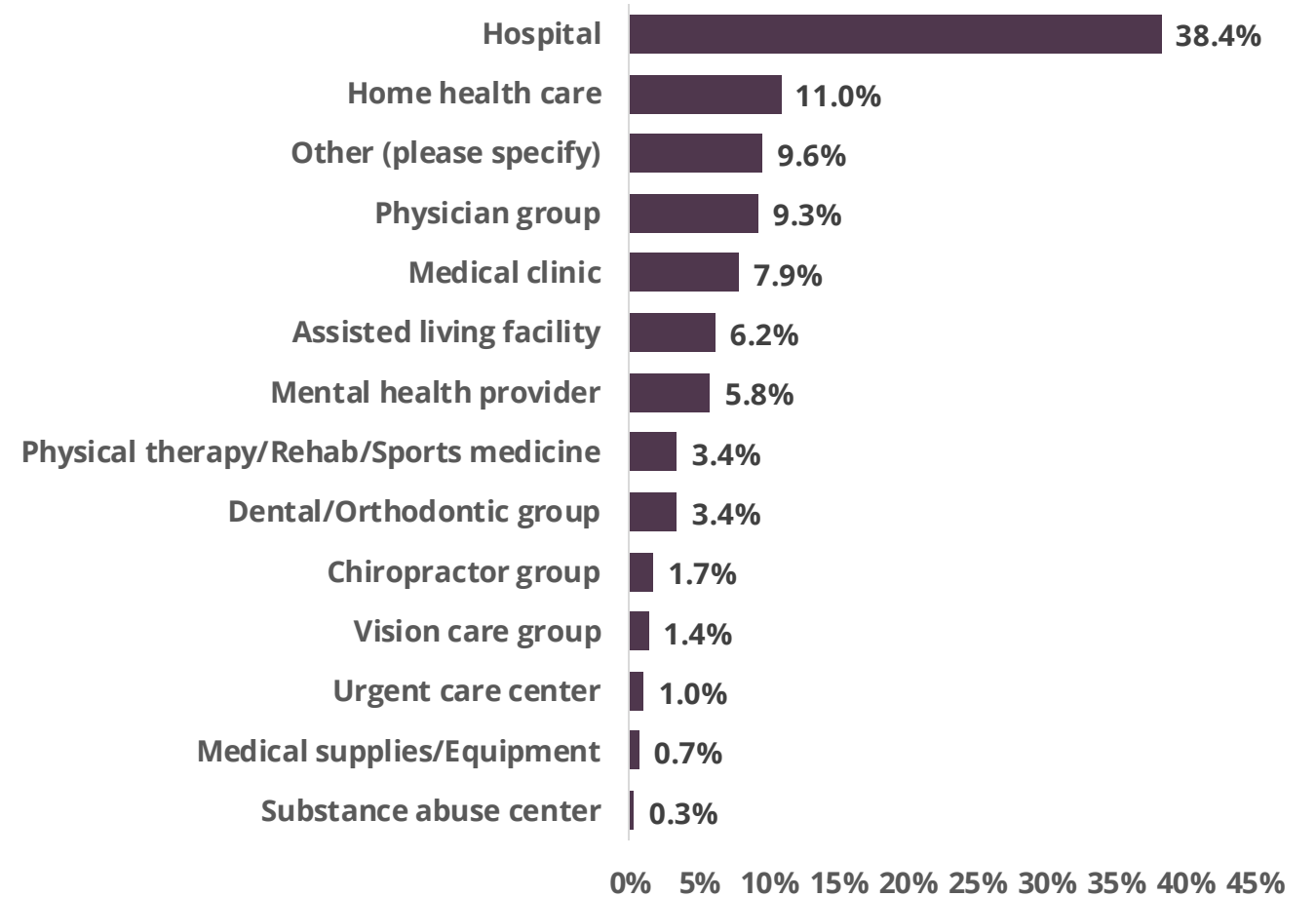
Sample Size 292

# Firmographics

## Annual Marketing Budget



## Type of Healthcare Provider



Q3) What is the size of your organization's annual marketing budget?

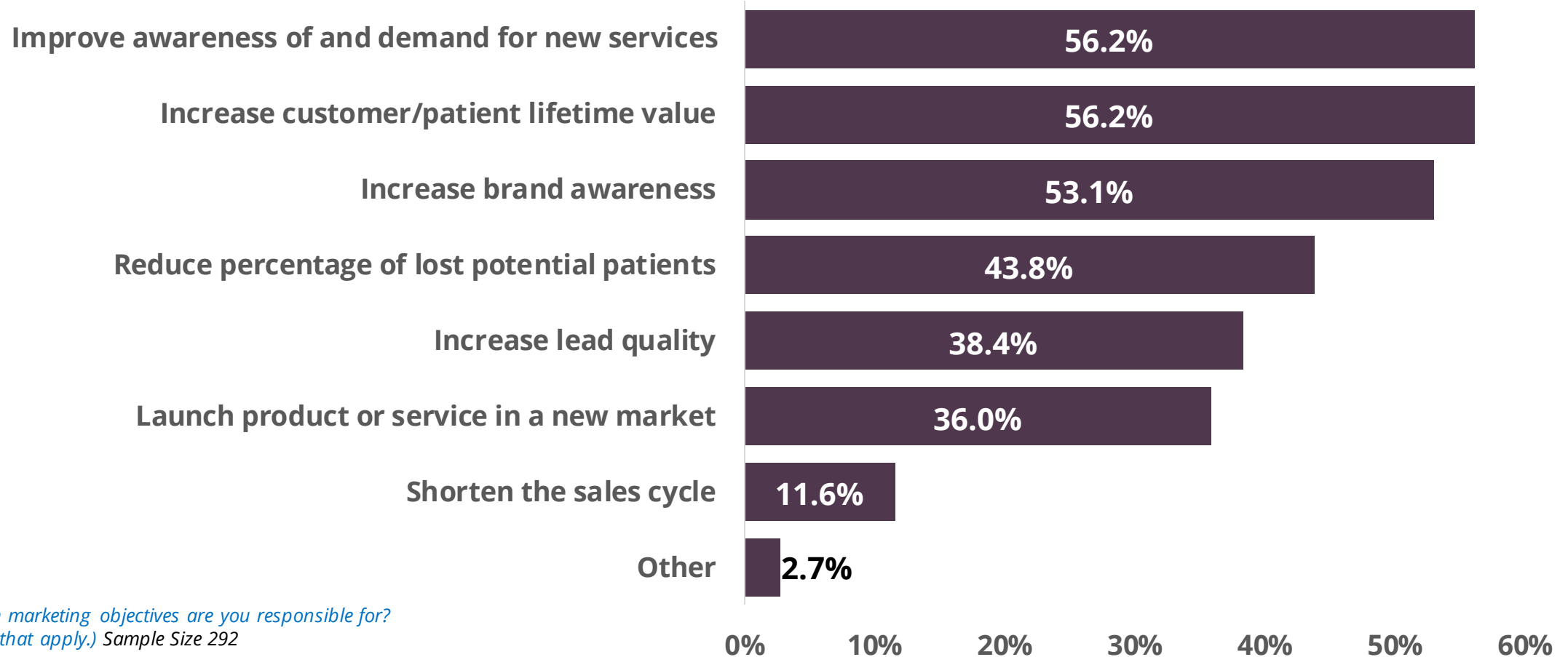
Q5) Which type of healthcare provider do you work for?

Sample Size 292



# Firmographics

## Marketing Objectives



Q6) Which marketing objectives are you responsible for?  
(Select all that apply.) Sample Size 292