

2021 Outlook

AMG.
HEALTHCARE MARKETING



What's Ahead for
Senior and Home Health Marketing



What a challenging year 2020 has been, especially for the healthcare industry.

We compiled this whitepaper with the aim of providing you with the information and tools you need to support your success in the upcoming year. Since challenges abound for healthcare marketers in the current era, we wanted to take what we learned from 2020 and apply it to 2021 marketing strategies.

To do this, we talked with our healthcare clients, researched healthcare trends, and tapped into the top marketing channels to deliver a framework for a 2021 healthcare marketing outlook.

Within this whitepaper, we provide an overview of some major trends in the past year across the senior and home healthcare markets. Looking specifically for healthcare systems and providers? Check out our parallel piece [here](#).

Now, let's dig in, shall we?





The Biggest Challenge for 2021 – Building Trust in the Midst of Uncertainty

How do we build and maintain trusting relationships? One great way to do so is through content marketing. Becoming an authority on your specialty, in this case it's home health and senior care, via content marketing creates a great opportunity for healthcare providers to display their knowledge and expertise—by publishing evidence-based content consumers can rely on.

In that light, developing high-quality content that's aligned with your prospects personas and intent has never been more important if you want to show up prominently in search results related to your organization's specific area of focus. You have to engage with prospects who are ready for care and those who aren't as well. Expanding your online experience will help keep healthcare prospects in the pipeline who are still delaying plans for care or a move to a senior community, and help convert those who are ready to take action now.

There's been nothing "normal" about the healthcare industry in the past year. COVID-19 turned it on its head in 2020, and will continue to be a major issue in 2021. Although uncertainty about the availability of a vaccine has dogged us all year, recent announcements about successful final results of clinical trials means that various versions of a vaccine will likely be available sometime in the near future.

A variety of dynamics may influence if, when, and how individuals receive a vaccine, but a game-changing breakthrough like this will undoubtedly play some type of role when it comes to marketing various offerings across the landscape of healthcare. As states endure the dance of trying to open more fully, there may also be new dynamics when it comes to vaccines, testing, and defining "immunity"—which may impact how healthcare organizations market their offerings.

One thing's for sure, feeling safe in the midst of uncertainty will continue to be important to consumers in the coming year. Those within the healthcare industry are uniquely positioned to help them get there, but will need to build and maintain trusting relationships to do it.





The Impact on Senior and Home Health Markets

In addition to a predicted surge in virtual care and employer-based healthcare offerings, Forrester predicts **a shift to “hospital-at-home care”** in an effort “to recoup \$350 billion in losses.” If such a move occurs, it would likely have an impact on both the senior and home health markets.

COVID-19 has been brutal to the **vulnerable populations** living within senior residential settings, and facilities have been required to make major changes to help keep their residents safe—including restrictions on visits from loved ones and extensive infection control procedures to try to protect residents and staff alike.

Quoted in a *Barron’s* **article**, Robert Kramer, founder of National Investment Center for Seniors Housing & Care (NIC) and head of aging advisory Nexus Insights says that things will never be the same in this sector: “When it comes to the senior-housing industry and care, there will be a time we see this in the rearview mirror but not a time when we will return to the old normal. That is critical for this industry and investors to understand.”





As article author Reshma Kapadia notes, the contagious nature of the virus and vulnerability of elderly loved ones has many families rethinking congregate living scenarios for their care. Important factors that are being recommended for families who are considering senior living communities for a loved one include:

- ◆ Assessing the quality of communication the facility has with families—including transparency about infection rates, monitoring, and isolation procedures.
- ◆ Assessing what type of support is provided to help families easily communicate with loved ones.
- ◆ Assessing how social isolation issues are being addressed and how well that's communicated to families.

How are you choosing to communicate with potential patients and their families? Direct communication is always helpful but reinforcing your message through different avenues might just be the extra push your audience needs to reach out to you, especially in this physically distant world we are living in now.

Our client Crowne Healthcare utilized several methods of communication such as search engine marketing and social media to boost consideration for their facilities.

However, even if families have concerns about congregate living for a loved one, remaining at home may not be an option. Some individuals with more extensive needs may not have the right type and amount of support to age in place, and it can be difficult to find optimal home-based solutions while concerns about the virus persist. Additionally, older individuals also face isolation while living at home, since many can't partake in the pre-virus activities they used to enjoy.

Taking all that into consideration, Kapadia underscores the fact that senior living facilities vary a great deal—and operate under a variety of federal,





state, and licensure regulations. While this may be a benefit for some, this “divergence of oversight” has also led to “an acute health crisis during the pandemic” fueled by uneven access to critical resources to help keep residents and staff safe.

Quoted in the article, Lori Smetanka, executive director of nonprofit National Consumer Voice for Quality Long-Term Care says that “The most consistent and frightening trend is the lack of prioritization of these facilities.” This issue is compounded by facilities which are often inadequately staffed to provide the type of care residents need.

Citing an April 2020 survey by McKnight’s Senior Living, Kapadia writes that **“About 75% of operators of independent living, assisted living, memory care, and CCRCs” reported shortages of PPE at the time.**

With the sharp rise in supply and labor costs, some senior-living experts predict a potential need to hire 200,000 to 300,000 additional staff members to deal with the pandemic, which may lead to “an economic cost of \$40 billion to \$57 billion over the next year.” To make matters worse, increased financial demands such as these are occurring at the same time that revenue is down due to reduced occupancy rates influenced by concerns of families and various state and local pandemic restrictions.

However, some experts predict that while independent living communities and those associated with the negative effects of the pandemic may continue to struggle, there will be a rebound in occupancy for specific populations of residents who can’t receive the support needed at home—such as those who require memory care services.





In addition to dealing with immediate needs, senior-living operators are considering the big picture by addressing issues like facility design, layout, ventilation systems, technology, and shifting from a “hospitality or real-estate model” to one that accounts for “the public-health ramifications of older people living in close proximity” by including easier access to medical services and using a multidisciplinary approach, Kapadia writes.

All of these dynamics are certainly impacting the approach that **senior living marketing teams** take—requiring the creativity and agility needed to adapt. Writing for *Senior Housing News*, Chuck Sudo says these teams have been required to integrate a number of changes into the marketing plan: “They will need to work remotely, leverage tech into their marketing and sales strategies, set up virtual tours and incorporate their communities’ responses to protecting residents from contracting the virus into the sales process.”

Although the pandemic has created extreme challenges for the industry, Sudo writes that senior living experts say the pandemic has also created new opportunities for marketing teams, including:

- A focus on building trust with prospects and families to create a pipeline for future business once the crisis subsides.
- A commitment to ongoing collaboration during remote work to ensure consistent messaging.
- A strategic approach to working as a team—including sharing best practices and dividing





duties according to each person's strengths, such as effective outreach through well-honed telephone skills.

- ◆ A willingness to address COVID-19 directly, with clear messaging about how the senior living community is responding to the pandemic.
- ◆ A proactive addition of negative keywords like "COVID-19" and "coronavirus" to digital ad campaigns so a facility's ads won't show up during a search for these topics.
- ◆ The addition of marketing tech platforms that can help everyone who's working remotely do so efficiently as a team.
- ◆ The addition of digital tools that integrate a community's branding into sales collateral, like videos of virtual tours.
- ◆ The creation of marketing offerings that also support current residents, families, and staff.

See how we boosted consideration for our client Crowne Health Care's assisted living facilities in the midst of a pandemic.

Challenges have been rampant in the home healthcare market, too, since providers have been required to go to great lengths to help patients feel safe about having someone come into their homes to care for them. In an interview with AMG, Mercy Life's Donna Wilhelm described the difficult dynamics involved.

"People have a lot of fear about new things, like having other people coming into their homes, even to care for them."

Although virtual offerings have been helpful for others, Wilhelm says her experience has been that using digital tools to support marketing efforts have been difficult: "It is very difficult to talk to an elderly person on a digital device."



Noting that some of their prospects don't have internet, the ability to invite someone into the centers to discuss services also isn't an option anymore: "Before, we reached people through home visits and inviting them to the centers. We can't do either now."

To mitigate these challenges, Wilhelm says her organization has adapted its messaging to address the fears many prospects express.



Have you noticed a trend here? There has never been a stronger call for a people-first approach to marketing. Prioritizing connection over conversion and demonstrating empathy not only in marketing messages but also extending it to ensure prospects are reached when and where they are in life and the healthcare journey is crucial in resonating with your audience and will ultimately benefit your organization's bottom line.

She says that in the past, one of their most valuable offerings was the adult day center, where individuals were able to get out of their homes for social engagement, to enjoy a meal, and attend religious events. Since that's not an option during the current era, the marketing focus has been redirected to emphasize the fact that living at home is safer than living somewhere else, and how Mercy Life can provide the support needed to help prospects remain there. "An older person wants to know how they can stay home," Wilhelm says.

As far as marketing strategies, she says they now include:

- Connecting with prospects virtually via phone, Facetime, or Skype.
- Finding handraisers through digital marketing that targets those searching for services, including family caregivers, social workers and other agencies—while also maintaining relationships built through enrollment staff.
- Quarterly articles delivered digitally that focus on a variety of topics, such as financing care and issues related to the state's PACE program.



Donna Wilhelm
Vice President of Advocacy at
Mercy Life of Alabama

"We changed our messaging to say that we understand you are safer or safest at home with the support of Mercy Life of Alabama. We changed it to match what people are feeling."



When asked about what's ahead for 2020, Wilhelm says she hopes to see a shift to more home-based care: "I hope that if anything positive comes out of this, we see a shift nationwide from institutionalized care of elderly to home and community-based services. The number of deaths in institutions was unbelievable whereas PACE programs had low infection and death rates. CMS has recognized this as well," she says. "We need to be looking toward the future and gear up programs that can keep people out of institutions. We need a real paradigm shift."

According to Robert Holly, writing for [Home Healthcare News](#), that paradigm shift may be ahead. He predicts a number of trends for the home healthcare industry that include:

- "Historic" consolidation within the industry, once the "coronavirus lifelines" offered by the federal government are no longer available.
- A shedding of in-house home health divisions by beleaguered hospital systems seeking to cut costs.
- A continued "retooling" of the Medicare Home Health Benefit in response to a variety of negative factors.
- The "double-edged sword" of telehealth which could lead to better patient outcomes and new lines of business—while also creating new sources of competition. However, federal reimbursement structures would need to change if home healthcare providers expect to compete with healthcare providers who are able to directly bill for in-home telehealth visits.
- "Hospital-to-home" models are also predicted to gain momentum after the pandemic is over.
- More providers will start offering community-based palliative care services as a result of the increased awareness of its value during the pandemic.

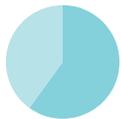




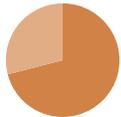
- The overall home health industry market will likely “expand at a faster-than-anticipated pace” due to a combination of factors, including the preference for aging in place and “because of SNF-to-home diversion and calls to decentralize the health care system with home- and community-based care,” providing increased referrals from a variety of sources. As a result, “home health agencies will need to ramp up their recruitment and retention strategies.”

What Consumers Want and Need

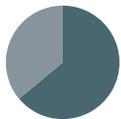
Research from [NRC Health](#) indicates that:



Around 60% of patients are worried about visiting any type of healthcare facility



Which is likely why 71% say they'd be interested in replacing in-person visits with those conducted via telephone and video



64% responded similarly regarding video encounters.

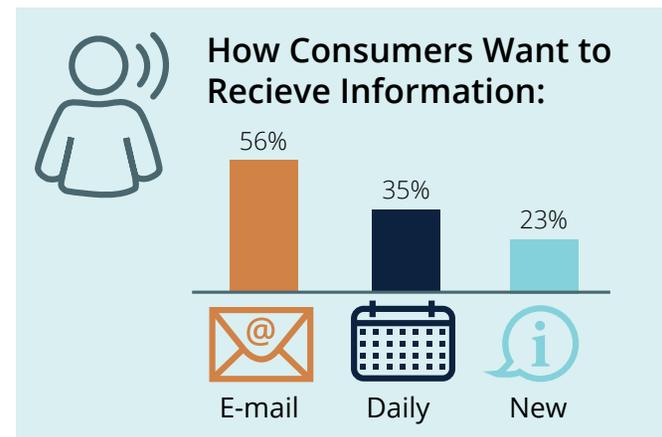
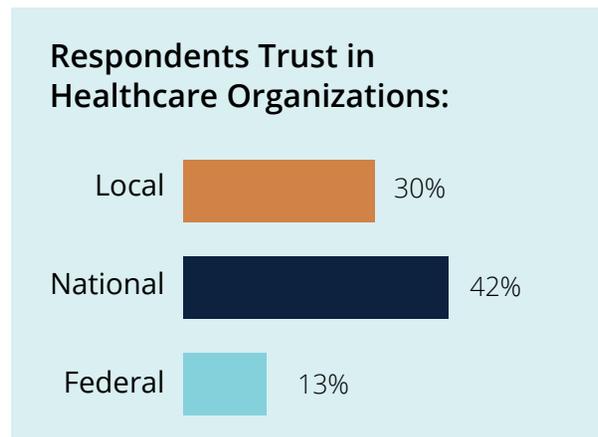
That explains why [millions are trying telehealth](#) for the first time ever—even for critical needs such as cardiovascular care—and most are quite happy with the convenience it provides.



NRC Health's survey also reveals the critical role healthcare providers play within the current environment to keep consumers updated and informed. In our current environment of mixed messages from various sources, respondents indicated that their healthcare providers were one of the entities they trusted most: "NRC Health's respondents trust local healthcare organizations (30%) and national healthcare brands (42%) to handle the crisis more than they trust any other entity—including the federal government (13%)."

In that context, clear, reliable, and consistent communication is something consumers crave from providers. Information about capacity and safety measures are essential—as is messaging delivered the way consumers want to receive it. While various factors may influence these dynamics, NRC Health's results include:

- "Most respondents (56%) said they preferred email over any other form of contact."
- "A significant plurality (35%) said they wanted to hear from providers every day."
- "23% would like to be reached as often as new information becomes available."





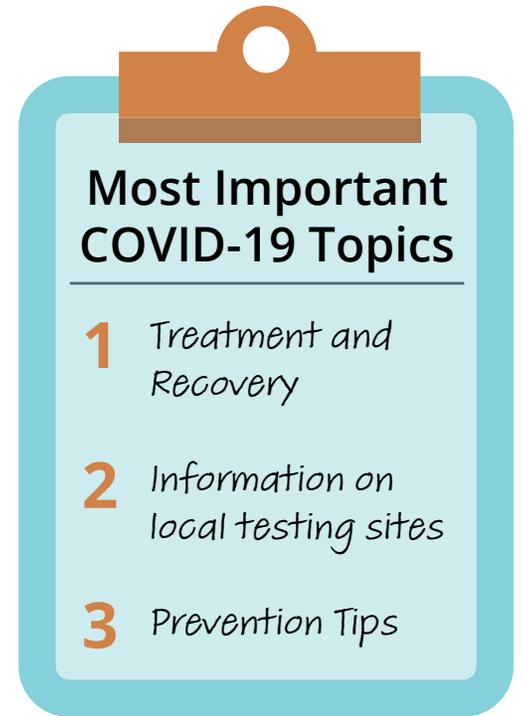
As far as what the messages should say, respondents prioritized the three most important topics as:

- "COVID-19 treatment and recovery (51% of respondents)"
- "Information on local testing sites (49% of respondents)"
- "COVID-19 prevention tips (46% of respondents)"

In addition to safety concerns and a preference for ongoing access to virtual care, DocASAP's **Telehealth Consumer Experience** **2020 survey** reveals consumers' growing demand for digital offerings, including self-service capabilities: "Understanding patient preferences and empowering them with the tools needed to manage their healthcare journey is becoming a major competitive differentiator for providers."

Commenting on survey results, Puneet Maheshwari, co-founder and CEO of DocASAP says, "Telehealth has quickly emerged as the preferred care setting during the pandemic and will drive patient behavior in the future. As providers continue to adopt innovative technology to power a more seamless, end-to-end digital consumer experience, I expect telehealth to become fully integrated into overall care management, ensuring timely access to the right provider in the right care setting."

As we stated earlier, feeling safe in the midst of uncertainty will continue to be important to consumers in the coming year. Those within the healthcare industry are uniquely positioned

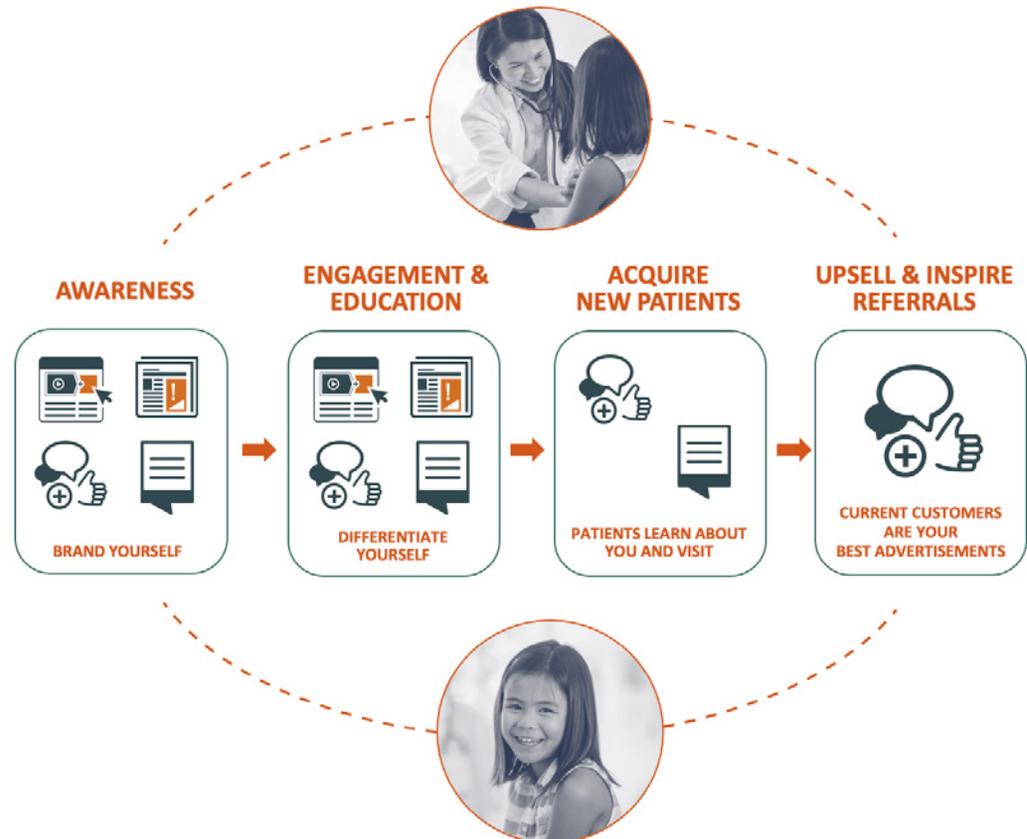




to help them get there but will need to build and maintain trusting relationships to do it. How exactly do we do that?

The home health and senior living facilities that will foster the most growth will be the ones that can stay on top of patient sentiment and give them the information they need to feel comfortable at your facility with a multichannel marketing approach. You might've heard of the phrase 'Content is King' which is true, but how good is the content if no one consumes it?

Building your brand through digital display and promoting posts through social media for example is a surefire way to get your content noticed. The dynamic flexibility within digital marketing allows for a playground of sorts for marketers to experiment and explore what works for them, no matter how big or small the budget. All in all, driving a thoughtful, multifaceted branding strategy will increase awareness and consideration for your home health/senior living facility while funneling prospects through the patient acquisition process.



Applying the four stages of the patient acquisition model to your marketing strategy will help you understand how to reach your audience at each stage so you are able to move prospects through the funnel.



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About AMG Healthcare Marketing

The health of the local practice depends on a marketing strategy that engages both the current and prospective patient base. From websites to social media platforms, practices must be seen and heard in the digital spaces where their patients are active.

AMG Healthcare Marketing directly reaches the majority of Alabama patients through our own online sites and publications and we use our data to connect with 100% of prospective patients through targeted social and digital networks. Because we have the ability to tightly target relevant audiences via HIPAA-compliant patient targeting data on our owned and operated digital publications, we can uniquely deliver more relevant, effective results than the competition.

Whether it be a hospital/health system, private practice or senior/home health, AMG Healthcare Marketing is prepped with the tools, knowledge and expertise to propel your healthcare marketing strategy forward. [Connect with us today](#) to get started.

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