

Chapter 1

Introduction to Health Care Marketing

1.1. Introduction and Plan of the Book

1.1.1. Health marketing vs. health care marketing

At the very beginning of this book, it will be prudent to clarify and distinguish certain concepts and terms used in the health care marketing and allied fields.

One of these terms is *health marketing*. Centers for Disease Control and Prevention (2011) defines health marketing as, “a multidisciplinary area of public health practice” and further explains that health marketing draws from fields like marketing, communication, and public health promotion to develop theories, strategies, and techniques for public health improvement. Therefore, health marketing is mainly about improving public health and it uses marketing research to develop effective methods to inform, educate, and motivate the public.

The term *health care marketing*, on the other hand, is used to address efforts by private health care product and service organizations to market their health care products and services. Examples are physicians who desire to increase their patient population, hospitals promoting potential patients to select their hospital over other hospitals in the area for inpatient and out-patient services, and pharmaceutical companies who desire acceptance of one of their prescription drugs by physicians and patients over competing drugs. Thus, the term health care marketing is used really to mean marketing health care services. In this sense, some educators and writers advocate the use of the term *health care services marketing*.

Health care marketing encompasses promoting public health. As such, health marketing can be said to be the more general term. This book is about

health care marketing. It has a section on effective marketing of public health. This book can also be classified as a book in health care service marketing. However, to be consistent, we will use the term health care marketing in the title of this book and subsequent discussions.

A brief clarification on the use of the term “modern” in the title of this book may also be proper. Traditionally, health care marketing had been equated to advertising and promotion of health care services by large health care product and service organizations such as hospitals and pharmaceutical companies, and to a lesser extent by physicians. For example, a definition in the Farlex Financial Dictionary (2012) is

“Health Care Marketing: The process of advertising hospitals, medical offices, pharmaceuticals and so forth.”

However, health care marketing has undergone major changes since its origin in the 1970s and especially during the last two decades to meet significant changes that have occurred in the health care industry during this period. This is indicated by the following more recent definition by Evariant (2017).

“Health care marketing integrates multi-channel, highly-segmented and targeted online and offline tactics that are designed to find and acquire the right patients, engage with them through strategic outreach, and nurture them to form lasting relationships throughout the entire patient journey.”

Implicit in this view is that modern health care marketing is no longer limited to billboards, radio and TV advertisements, and direct mail. While Chapter 2 provides a comprehensive summary of modern trends in health care marketing, the following is a brief introductory note on three of the most significant of these changes:

- Modern health care consumer is more informed.
 - According to Gallagher (2017), in an article, “How Has Healthcare Marketing Changed in the Last Decade?”,

“The patients have become more informed. When you have an informed patient, it’s very difficult to market the same way that you (did) in the past.”
 - Also, “When you have an informed patient, it’s very difficult to market the same way that you were in the past” (Whitler, 2015).

- Furthermore, in today's digital world, consumers are no longer reliant on traditional methods of communication to get their information, e.g., billboards, direct mail, radio ads, etc. Mobile technology and the rise of smartphones have made health care information easily accessible. Health apps on smartphones are one of the most highly used apps as nearly 30% of US adults use health apps (Kratzke and Cox, 2012).

One in 20 Google searches are for health-related information (Google, 2015). One in three American adults have gone online to figure out a medical condition. About 72% of internet users say they looked online for health information within the past year. Around 47% of internet users search for information about doctors or other health professionals. Additionally, 38% of internet users search for information about hospitals and other medical facilities (Fox and Duggan, 2013). Modern health care marketing focuses on consumers and patients living in this digital world.

- For health care consumers, personal experience is the number one reason for choosing a doctor or hospital. The need for health care marketing to recognize this health care consumer behavior is emphasized by many contemporary experts. For example, such emphasis is in "Patient Experience: The Forgotten 'P' in Your Medical Marketing Plan" (Gandolf, 2012) and "2018 Healthcare Marketing Trend #1: Customer Experience" (Kernan, 2017).

Modern health care marketing acknowledges the significance of consumer/patient personal experience and their emotional ties with health care providers such as physicians and hospitals. Connolly (2017), in an article titled "Why Authenticity is the Prescription for Modern Healthcare Marketing" describes this well: "Healthcare marketing of the past focused on what a person felt internally during a physical ailment. (Now) smart healthcare marketers are recognizing a commonality between their patients/consumers that can be used to connect with them emotionally."

Modern health care marketing recognizes that the present health care consumer lives in a digital and experience economy that significantly affects his/her consumer behavior toward health and health care services.

1.1.2. Focus and scope of this book

This book is on health care marketing, which will also discuss health marketing, i.e., marketing of public health services. In other words, this book will

address marketing health care products and services provided by key providers such as physicians, hospitals, pharmaceutical companies, managed care organizations (such as Health Maintenance Organization or HMOs and Accountable Care Organizations or ACOs), and governmental public health promotion agencies.

This book will trace recent changes in the health care industry and health care consumer behavior. For example, the modern health care consumer is known to be engaged in social media and explore the internet for information on health issues and health care services, and thus, he/she is more informed (Gallagher, 2017). Advances in technology have made a great impact on modes of communication between health care providers and consumers. Due to the aforementioned reasons and many other changes in the health care industry and consumer behavior, changes are required while marketing health services. For example, “when you have an informed patient, it’s very difficult to market the same way that you were in the past” (Gallagher, 2017). Over the last six years, more than US\$18 billion has been invested in health care technology ventures with 2017 going down in history as the largest year ever for digital health funding (Resnick, 2017). More than 65% of chief health care marketing officers say they use social media to drive business and build their digital brand (Resnick, 2017).

This book will address these and many other recent changes in the health care industry and resulting changes in health care marketing strategies and practices.

1.2. Health Care as a Key Component of the Service Sector

Health care is a key subsector of the service sector of an economy, other subsectors of the service sector of an economy being public services (including social services, judicial services, military, fire and police services, waste disposal services, etc.); educational services; banking, insurance and financial services; entertainment services; transportation and distribution services; legal services; information and information technology (IT) services; construction and repair services; communication services including library and mass media; tourism, leisure, restaurant, and hospitality services; retail sales services; real estate services; and professional and consulting services.

Services account for a significant portion of an economy and health care services make up a substantial portion within the service sector of many economies.

- In 2015, service sector's share of nominal US gross domestic product (GDP) was 79.7% (Central Intelligence Agency, 2016: "The World Fact Book" cited in Index Mundi, 2016). The estimate for 2017 is 80.2%. In 2016, 80.3% of US employment was in the service sector (Bureau of Labor Statistics, 2017). The projection for 2026 is 81%.
- Globally, service sector's share of the GDP in the world in 2015 was 63.6%. Economic data from countries across the world show similar patterns of large contribution by the service sector to the economy of these countries. For example, the percentage of value added to GDP in 2014 by the services sector in India, Singapore, UK, Australia, and Hong Kong was 52.1%, 75.0%, 78.4%, 70.5%, and 92.7%, respectively (World Bank, 2016).
- Health care services are a significant subsector within the service sector of many economies. For example, global health care spending is projected to increase at an annual rate of 4.1% in 2017–2021 (Deloitte Global Health Care Sector Outlook, 2015).
- In 2016, health care and social assistance accounted for 10.2% of US employment (Bureau of Labor Statistics, 2017). The projection for 2026 is 13.8%.
- By 2016, 56.8 million individuals were enrolled in the US Medicare program (National Committee to Preserve Social Security and Medicare, 2017). Managed care for the elderly under Medicare Advantage Programs was projected to cover nearly 21 million people in 2018, a 5% increase over 2017 (Price Waterhouse Cooper, 2017).

From these statistics, we can conclude that both the service sector and the health care services sector are key components of the US economy. Predictions are that the share of these sectors will continue to grow. Growth in the health care services sector is led mainly by the increasing elderly population and health care reforms creating new health care programs, e.g., Medicaid expansion and state programs that add health care benefits to certain immigrant groups.

1.3. Types of Health Care Services Usually Marketed

There are many health care services, and health care-related products such as durable medical equipment and pharmaceuticals, that are marketed on a continuing basis in the US.

We will first compile a comprehensive list of these products and services. Later chapters in this book will address variations in marketing strategy and practices among these products and services.

Health care products and services regularly marketed include the following:

- *Physician services by individual practitioners and medical groups/IPAs:* “IPAs (Independent Practice Associations)” are medical corporations formed by physicians that cover primary and specialist care by physician owners or contracted physicians. A “medical group” serves the same purpose, but medical groups are usually physician partnerships whereas an IPA is a more formal legal entity with enhanced financial strength and management structures that enables contracting with health plans.
- *Hospital services:* Inpatient, outpatient, and emergency care.
- *Comprehensive health care services:* These are arranged by managed care health plans (also called Health Maintenance Organization or HMOs), independent practice associations under contracts with HMOs, and Accountable Care Organizations (ACOs). Organizations arranging comprehensive health care services are also called Managed Care Organizations (MCOs). These entities provide or arrange the provision of the following:
 - Medicare/Medicaid managed care products;
 - Medicare supplement products (also called “Medigap” products);

The term *health plan* is used in this book to denote an entity that provides or arranges for coverage of health care services needed by persons enrolled in the health plan (called “plan members”). Health plans receive a monthly premium (called “capitation”) for each plan member from the ultimate payers such as federal government, state governments, employers, and individuals desirous of purchasing health insurance. In this sense, health plans fulfill the role of an insurer. Health plans could be full-service health plans or specialized health plans. Examples of the latter are health plans that offer dental services only.

- Medicare part D prescription plans; and
 - Private insurance products primarily marketed B2B to employers. These include Consumer Directed Health Care (CDHC) programs — Health Reimbursement Arrangements (HRA), Health Savings Accounts (HSA), and Flexible Savings Accounts (FSA) involving B2B marketing.
- Pharmaceuticals and medical devices (including durable medical goods).
 - Urgent care services/centers.
 - Physical therapy and rehabilitative care.
 - Long-term care: Home health care, assisted living care, and skilled nursing facility (SNF) care.
 - Mental health care.
 - Ancillary health services (e.g., audiology, speech therapy, and podiatry).
 - Diagnostic services (laboratories and imaging centers).
 - Outpatient surgery services/centers.
 - Long-term services and support (LTSS).
 - Dental care services.
 - Optometric services.
 - Public health services: As discussed earlier, the term “health marketing” is used to address public health marketing.

1.4. Who are the “Customers” in Health Care Marketing?

Ordinarily, marketing of health care products and services would appear to be directed at consumers with the intention of influencing their decision to select a health care product, service, or service provider. However, health care marketing (as the book will emphasize later) is not only about mass advertising and promotion of health care products and services directly to consumers. It is also about communicating the advantages of a health care product or service. Sometimes this is more effectively possible by directing the message via other parties and stakeholders that influence the ultimate customer or user.

A comprehensive classification of “customer” in health care marketing should include the following:

- **End user customer: The patient**

It is the patient that will eventually visit the physician, get inpatient services from the hospital, or use a prescription drug. However, the patient is not always the person making the selection of physician, the hospital, or the

drug. Patient's selection of a physician may be influenced by family and the selection of a hospital is highly influenced by the referring physician. Therefore, we will extend our list of customers to include these other influencing parties.

- **A patient's family**

Often health care decisions of a patient are influenced by the family. Miliard (2014) cites an article by Urmila Sarkar, MD and David W. Bates, MD, from University of California, San Francisco (UCSF) and Brigham and Women's, respectively, in the *Journal of the American Medical Association*, that states that each year, more than 65 million people in the US (29–39% of the population) provide care for a chronically ill, disabled, or elderly family member or friend. "Provide care" here means that they are involved in the decision-making relating to care. This feature is most common in the independent and assisted living provider community. Smart providers of independent care, assisted care, and skilled nursing care welcome the involvement of children in selecting retirement homes and communities for their parents and focus their marketing efforts toward these children.

- **The well person: The consumer**

Health plans call individuals enrolled in their plan "members" or "enrollees". The decision of which health plan to select and which physician in the health plan's network of providers to select for services is made by the enrollee way before he or she falls sick. Therefore, the consumer in general is a customer in health care. Remember that, an ordinary person, other than a person with chronic illnesses, disabled, or terminally ill person, is well, most of the time.

Two-thirds of an individual's interaction with a health care provider is as a customer pre- and post-treatment. Only one-third of their encounter is as a patient during treatment (Krivich, 2011).

- **Physicians**

Hospitals and pharmaceutical companies direct a major portion of their marketing efforts and budgets toward physicians. The primary care physician is the primary source of information and advice for the patient on treatment options, medication, specialist physicians to consult, and hospitals.

- **Pharmacists**

Pharmacists play a major role in providing consumers information on generic drugs and non-prescription over-the-counter medications. For this reason, pharmacists are valuable customers to pharmaceutical companies. Myers (2018) identifies special groups of health care consumers who depend on pharmacies and pharmacists for health care-related information. These include consumers who have no insurance, consumers who think that they are not sick enough to visit a physician, and rural consumers.

- **Care coordinators**

Patient-centered coordinated care is highly emphasized in modern health care. In this sense, patient care coordinators play a significant role in educating patients and their families, initiating and monitoring the care plan and coordinating the care plan with direct care providers. In this sense, care coordinators are valuable “customers” for health care marketers who should recognize them as key targets for their marketing communications.

- **Communities and consumers**

Communities and consumers are the customers for public health marketing. Federal and State health departments and agencies (e.g., CDC) spend large amounts of their budgets to promote healthy behavior like smoking and substance use cessation.

- **Internal customers: The staff of the health care organization**

Customer satisfaction and customer/patient experience enhancement efforts should be first preceded by improvements in internal customer (i.e., employee) relationships. Improvements in employee relationships come about via an organizational implementation of internal marketing. By focusing on internal marketing, health care managers will gain a motivated staff composed of knowledgeable and prepared employees. In modern health care marketing, internal marketing is considered an integrative effort that includes participation of the health care marketing function of the organization. Employee engagement and internal marketing are discussed in Chapter 11.

1.5. Special Characteristics of Health Care Services Affecting Health Care Marketing

In Section 1.2, we highlighted that health care is a key subsector of the service sector of an economy. Therefore, special features in services (as opposed to tangible products) are inherent in health care services.

First, we will briefly review special characteristics of services in general. Next, we will review certain special characteristics of health care services that affect the marketing of health care services.

Special characteristics of services include the following:

- *Contact between customer and service staff:* Degree of customer contact with organization's staff is much higher in services compared to manufacturing. Some services such as medical encounters are classified as "high contact" as opposed to phone or online ordering which can be classified as "low contact". High contact usually brings about behavioral and personality-related issues and problems.
- *Variability in input:* Customers seek from service providers solutions to non-uniform (varying) needs. In products, all customers will be buying the same product with some variations in price, performance, and size. For example, a computer store may have three or four types of computers varying in price, size, and capability. In the case of services, customers' needs have greater variability. Each patient needs a different diagnosis and each car repair needs a different treatment.
- *Variability in output:* Service provided by different employees of the same service organization, e.g., a bank, may be different in terms of time taken and quality (such as percentage of errors). Service employees differ in experience and personality. Products purchased by customers, say from a store, are all the same with perhaps minor variations like color.
- *Services usually have a greater labor content:* Manufacturing operations are usually capital intensive whereas service operations are labor intensive. Coupled with the variability of customer needs, service employees will be expected to have broader and flexible skills.
- *Services are intangible:* Services cannot be stored in an inventory like products since they are intangible. When the customer needs the service, it must be provided. Another factor related to intangibility is the difficulty to explain to the customer the quality of the service. In products, we have something tangible to show. In services, we do not have a tangible product or a model to show the customer.
- *Greater subjectivity in customer's evaluation of the quality of a service:* In evaluating the quality of a product, a customer can be presented with an objective performance, facts, and results. Evaluation of the goodness of a

service is made by the customer using many subjective measures, such as fair treatment, courtesy, and friendliness, in addition to the service outcome.

- *Services are provided simultaneously as customer goes through the service process:* With products, a customer has the pre-purchase opportunity to test the product. The customer also gets to take the product home and use and observe its performance. In services, the customer receives the services while going through the service. For example, in a medical clinic, the patient receives treatment (e.g., an injection) while being in the clinic. Once done, the service is over. The process cannot generally be reversed.
- *Customer participation in the service:* In services, the customer participates in the process. Products are made in a factory and the customer would test and purchase the product. In a service, the customer is physically present while receiving the service. Therefore, the customer is impacted not only by the outcome but also by the process itself. Rudeness of one service employee may lead to customer dissatisfaction with the service provider although the outcome (e.g., a repair or a medical diagnosis) may have been mostly positive.

1.5.1. Additional special characteristics of health care services

While all the above special characteristics of services in general are inherent in health care services, there are additional characteristics of health care services that affect health care marketing. These are as follows:

- Consumer/patient behavior, expectations, and perceptions in health care services are different from behavior, expectations, and perceptions applicable to other services (such as hospitality and travel). Notable features in health care services that affect consumer/patient behavior include the following:
 - High uncertainty, anxiety, and emotions associated with health care encounters and outcomes.
 - Lack of full information about illnesses and treatments.
 - Both outcome and process components are extremely important to the health care customer/patient.
 - Health care services involve handling functional as well as emotional outcomes of customers/patients.

- Trust is a key dimension in consumer/patient satisfaction (for example, see, Ameryoun *et al.*, 2017, “Trust in services has the strongest influence on perceived hospital service quality”).
- Customer/patient experience has become the leading driver of health care management and marketing. Some expert opinions related to significance of customer/patient experience in health care are as follows:
 - Kernan (2017): “2018 Healthcare Marketing Trend #1: Customer Experience”.
 - Gallagher (2017): “Nowadays I think they have to put customer experience at the very top (of priorities)”.
 - Gandolf (2012): “For healthcare consumers, personal experience is the number one reason for choosing a doctor or hospital” in “Patient Experience: The Forgotten ‘P’ in Your Medical Marketing Plan”.
- Multidimensional nature of customer expectations in health care: Competence, trust/assurance, empathy and concern, courtesy, access/waiting times, cost/value, information and communication, responsiveness, fairness, physical facilities/tangible factors, and social interactions with other customers/patients.
- Increased use of internet and social media by health care consumers/patients for information. This requires health care marketers to adopt modern forms of digital marketing.
- Heavy dependence of health care consumers/patients on family, friends, and physicians in selecting health care products/services. Therefore, there is a need to market health care services to intermediate parties rather than the end user, e.g., marketing to physicians to encourage referral of consumers/patients to a managed care health plan or hospital.
- Intense regulation of health care delivery and marketing via federal and state laws and regulations. Health care services is one of the most regulated services. Marketing Medicaid and Medicare products are highly regulated and monitored by federal and state agencies.
- Health care services and health care marketing are subject to some of the most stringent and monitored ethical standards.
- Variations in health care services that make it impossible to adopt “one shoe fits all” marketing strategies and practices. For example,

- Marketing Medicare advantage plans is completely different from B2B marketing of private insurance plans.
- Marketing hospital services to physicians and consumers is completely different from marketing physician services to consumers.
- Modern patient care is highly patient centered. This requires health care marketing to move from segmenting customers/patients into large segments to niche segments and customer-centric marketing.
- Inherent intangibility of health care services requires “tangibilization” using techniques such as content marketing (to be addressed later in the book).
- Health care services are very high contact. This makes employee customer orientation, employee engagement, and internal marketing extremely important.
- Health care services are significantly affected by cultural and ethnic backgrounds of patients. While this is true for health care services in the US, it is more applicable in medical tourism where patients cross borders and go to foreign countries to receive medical treatment.
- Need for integration with other functions. The patient/customer experience depends on health care operations (including service recovery), health care informatics (IT), and customer service. This requires health care marketing to work closely with these other functions.

Summarizing, health care service delivery and health care marketing are significantly affected by the huge array of special characteristics relevant to health care services. Therefore, general principles and practices of marketing advocated in business school marketing texts and courses cannot be applied for health care services marketing. This book will address special circumstances relevant to health care service management and marketing.

1.6. Plan of the Book

This book is organized in four parts.

Part 1: Health Care Marketing: Evolution and Modern Trends

In this part, we will clarify key terms such as health care marketing and health marketing, and discuss role of health care services in the overall service

sector, types of health care services typically marketed, and special characteristics of health care services that affect marketing such services (Chapter 1).

This part will also trace (Chapter 2) evolution of the fields of marketing, services marketing and health care marketing, and adoption of developments in services marketing to health care marketing. Finally, this part will discuss modern trends in health care marketing.

Part 2: Health Care Marketing Strategy Formulation and Implementation Process

This part will discuss how health care marketing in a health care organization starts with formulating the health care marketing strategy, discussing in detail the process of formulating strategy at the organizational level and market segment and niche level (Chapter 3).

This part will also discuss the role of market and marketing research in the health care organization (Chapter 4) and use of primary and secondary data to study competition (Chapter 5), consumer behavior (Chapter 6), and factors affecting consumer/patient experience (Chapter 7). This will be followed up by a discussion on how to segment the market and identify niches (Chapter 8).

Finally, this part will explain how the ground-level marketing mix is developed for each market segment and niche identified (Chapter 9).

Part 3: Health Care Marketing Program Implementation

This part picks up from health care marketing strategy formulation and moves on to implementing strategy and the marketing mix.

It will discuss in detail about integrating digital technology into health care marketing, social media marketing, and content marketing (Chapter 10).

Also discussed is the concept of internal marketing, which deals with how to engage employees of the organization in delivering a memorable experience to the customer/patient (Chapter 11), and how to engage physicians who are the key source of information and referral for potential customers of health plans, hospitals, and pharmaceutical companies (Chapter 12).

Finally, this part will address an important issue in implementing health care marketing, namely compliance with applicable laws and regulations, and adhering to high ethical standards and practices. Included in this discussion are guidelines for executing legal contracts between parties such as health plans and hospitals, and health plans and physicians that ensure compliance with applicable laws and regulations and consumer/patient protection (Chapter 13).

Part 4: Health Care Marketing in Special Sectors

This part will address health care marketing in special sectors of the health care industry such as direct health care marketing of physician services, hospital services, managed care plans/services, pharmaceuticals, and public health (Chapter 14).

Also discussed is health care marketing globally covering outbound medical travel consumer/patients (called medical tourism) and in-bound medical travel customers/patients (Chapter 15).

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