



# FROM BILLBOARDS TO CLICKS

*The Digital Transformation of Healthcare Marketing*



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## Glenn Elliott

Manager, Digital Applications  
Hackensack Meridian Health

“If you want more resources in healthcare, **measurement** is the starting point. **You’ve got to prove impact, not just spend.**”

# A New Era for Healthcare Marketing

Healthcare marketing is undergoing a seismic shift. For decades, hospitals and healthcare organizations relied on traditional advertising, like billboards, TV spots, print ads, and sponsorships, to build brand awareness. But those methods were blunt instruments, casting a wide net without a way to measure impact. Today, that approach is rapidly becoming obsolete.

Healthcare marketers are being asked to do more with less. Rising costs, shrinking budgets, and increasing competition mean that simply being seen is no longer enough. Instead, organizations must prove that their marketing efforts are driving measurable results, engaging the right patients, and ultimately impacting revenue.

This shift isn't just about efficiency. It's about survival. Consumer expectations have evolved, and healthcare marketing must evolve with them. Patients today expect seamless, digital-first experiences similar to what they get from e-commerce or modern banking. They want to find care easily, schedule appointments with a click, and receive follow-ups without hassle. Healthcare organizations that fail to meet these expectations risk losing patients to those that do.

Andy Chu, Senior Vice President of Product and Technology at Providence Health, explains exactly how they're thinking about this challenge:



## Andy Chu

Senior Vice President of Product and Technology, **Providence Health**

“We want to provide a really seamless experience for our patients. Historically, because of the IT infrastructure for most healthcare systems, patients face what I call ‘digital dead ends.’ They are all separate experiences—texts, bills, MyChart notifications—patients have to go hunt them down. The question is: how do we bring everything into a single experience? So as a patient, you're like, ‘Oh, I can always go back here to see everything I need to for my care journey.’”

To better understand this challenge, and how healthcare organizations are solving it, we surveyed healthcare marketers and interviewed industry leaders, including Scott Orstad, Vice President of Marketing at Catholic Health, and Jeremy Rogers, Vice President of Patient and Consumer Experience at Indiana Health.



## Scott Orstad

VP of Marketing  
Catholic Health



## Jeremy Rogers

VP of Patient & Consumer Experience  
Indiana Health

Their perspectives, along with survey data, provide a clearer picture of how organizations are adapting to the digital shift in healthcare marketing.

This eBook will unpack those insights, explore the challenges healthcare marketers face, and provide strategies to help organizations not only adapt but thrive in this new era of digital-first, data-driven marketing.

# The Current State of Healthcare Marketing

Healthcare marketing is in flux. The days of blanket media buys across print, radio, and TV are slipping away, while digital marketing strategies are taking center stage. We're seeing marketing budgets being reallocated to digital channels like social media, search ads, and programmatic displays.

When we surveyed healthcare marketers about this trend, **72% of respondents said they're reallocating budgets to digital** due to rising costs and diminishing returns on traditional media.

This shift isn't new, but the momentum is accelerating. In our survey, **nearly two-thirds (67%) of respondents say they're increasing investment in search ads over the next five years**, with **63% already spending more on social media ads compared to five years ago**.

Meanwhile, traditional media continues its slow decline—**58% of healthcare marketers expect local TV, print, and out-of-home ad spend to shrink or stagnate**.

Percentage of respondents reallocating marketing budgets to digital

**72%**



Percentage of respondents increasing investment in search ads over the next five years

**67%**



Percentage of respondents spending more on social media ads compared to five years ago

**63%**



Percentage of respondents expecting traditional media ad spend to shrink or stagnate

**58%**



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Financial constraints are making traditional media harder to justify, but this shift isn't just about cost-cutting—it's also a response to changing patient expectations.

Today's healthcare consumers, especially Millennials and Gen Z, expect seamless, digital-first experiences when seeking care. **Nearly 60% of our survey respondents say digital outreach allows them to engage patients more effectively than offline efforts ever did.** As a result, healthcare organizations aren't just following marketing trends—they're adapting to the way patients now navigate their healthcare choices.

## The Big Shift to Digital

A major driver behind this shift is the need to adapt to tighter budgets and changing costs. Healthcare organizations are facing financial pressures from multiple directions, making traditional marketing investments harder to justify.

The COVID-19 pandemic fundamentally altered the economics of healthcare, creating a perfect storm of increased patient demand, reduced provider availability, and declining profitability. **59% of healthcare organizations have either seen their ad budgets decline or stagnate over the last five years,** reflecting these financial pressures.

With financial constraints tightening, healthcare marketing teams are being asked to justify every dollar. Large-scale traditional advertising campaigns, such as billboards, TV spots, and professional sports sponsorships, are no longer as viable in this environment.

Instead, marketing dollars are shifting toward more cost-effective, data-driven digital strategies. This has had a direct impact on traditional advertising channels—**70% of respondents reported a decline or stagnation in local media spend,** while **58% have decreased their budgets for national media like print, TV, and OOH.**

**59%**

Percentage of respondents who have seen their ad budgets decline or stagnate over the last five years



**70%**

Percentage of respondents who reported a decline or stagnation in local media spend



**58%**

Percentage of respondents who have decreased their budgets for national media



However, despite these cutbacks, digital continues to be the priority. **A majority (52%) of respondents expect their social media and search ad budgets to increase over the next five years**, signaling a long-term commitment to more targeted, performance-driven marketing strategies.

**52%**

Percentage of respondents who expect their social media and search ad budgets to increase over the next five years



Jeremy Rogers, the Vice President of Patient and Consumer Experience at Indiana Health agrees, saying, **“We’re taking a good chunk of those dollars and reinvesting into pure-play digital spend.”**

### **Jeremy Rogers**

VP of Patient & Consumer Experience  
**Indiana Health**

Digital marketing offers several advantages: it allows for hyperlocal targeting, real-time campaign adjustments, and precise measurement of ROI. Unlike traditional media buys that require large upfront commitments, digital channels, such as Google, Meta, and programmatic advertising, allow healthcare marketers to scale their spending up or down as needed. **“We can increase and decrease on a dime,”** Rogers says. **“And we can target specific patient populations or zip codes where we have capacity.”**

This shift isn’t just about innovation. It’s a matter of survival. As healthcare marketing budgets shrink and financial scrutiny increases, marketing leaders must prove their impact with measurable, revenue-generating strategies. The future of healthcare marketing will be defined not by who can spend the most, but by who can invest the smartest.

Simply put: The traditional approach isn’t as cost-effective anymore. For example, things like broadcast TV ads, which were once a go-to for patient outreach, are rapidly falling out of favor.



## How Digital Delivers on Modern Patient Expectations

Feature	Digital Marketing	Traditional Marketing
Targeting	Highly targeted	Broad audience targeting with limited segmentation
Measurability	Easily measurable with analytics tools (real-time tracking)	Difficult to track
Cost Efficiency	Lower cost per acquisition, more budget control	High upfront costs
Flexibility	Easily adjustable campaigns, real-time modifications	Limited flexibility (once printed/aired, cannot be changed)
Speed of Execution	Instant campaign launches and adjustments	Long lead times for production and placement

However, shifting to digital isn't just about replacing old media—it's about meeting modern patient expectations. Consumers today expect frictionless, Amazon-like experiences, where they can find care, schedule appointments, and receive follow-ups without unnecessary complexity. Catholic Health is investing in digital marketing not just to drive patient engagement, but to support its broader digital transformation efforts—including online scheduling, virtual visits, and centralized call centers to improve patient access.

"Healthcare consumers expect seamless access to care, just like they expect convenience in retail or banking," says Scott Orstad, VP of Marketing at Catholic Health. "If we don't meet those expectations, they'll go elsewhere."

### Scott Orstad

VP of Marketing  
Catholic Health



This highlights a key shift: digital marketing is no longer just about promotion, but about creating an integrated patient experience. That doesn't mean traditional media is disappearing entirely. Orstad notes that while TV and out-of-home advertising still play a role, digital advancements allow for smarter, more efficient targeting. Instead of broad metro-wide TV buys, Catholic Health uses digital out-of-home placements at train stations near their facilities to ensure ads reach the right audience.

“There’s a fine tension between brand-building and proving revenue impact,” Orstad says. “Leadership wants to continue investing in marketing, but we also need to show how we’re driving measurable business outcomes.”

This balance between brand and ROI, long-term digital evolution, and patient experience improvements defines healthcare marketing’s shift to digital. In short, digital is not just a marketing channel—it’s a business necessity. But digital success isn’t just about adopting the right strategies—it’s about executing them effectively. And that’s where many healthcare organizations struggle.

## Gaps in the Digital Ecosystem

Making the leap to digital isn’t without its challenges, and one of the biggest hurdles is operational alignment. Healthcare marketers often face a critical disconnect between digital marketing and patient access systems. Even if marketing efforts drive traffic to a website, broken scheduling systems, fragmented call centers, or complicated appointment workflows can prevent patients from converting.

Another major issue? Data integration. According to our survey, **70% of healthcare marketers are either unconfident or only somewhat confident in using their data to adjust their digital advertising strategy.** Ideally, data should be a tool for optimizing campaigns, personalizing outreach, and improving patient engagement. But in healthcare, **57% of marketers cite technology as a major barrier to digital transformation.** In other words, even when they have the right data, they often lack the infrastructure or expertise to use it effectively.



### Stephanie Downing

Digital Communications Manager,  
St. Elizabeth Healthcare

Stephanie Downing, Digital Communications Manager at St. Elizabeth Healthcare, emphasizes the importance of aligning marketing and operations. “We can have the best storytelling and advertising, but if we don’t deliver a seamless patient experience—where scheduling is easy and follow-ups are smooth—it won’t matter.”

Then there's the issue of privacy. Healthcare organizations collect an enormous amount of patient data, but **strict privacy regulations**—including HIPAA—limit the ability to retarget or track patients as easily as other industries.

"We have more data about our customers than any other industry," says Jeremy Rogers, Vice President of Patient and Consumer Experience at Indiana University Health. But how to use it effectively remains a puzzle. It's not just about collecting data—it's about using it in a way that respects patient privacy while still delivering personalized campaigns that perform well. Rogers put it bluntly: "If you do it the wrong way, it's creepy and you can lose a customer much faster than retaining them just by doing something stupid."

This tension between personalization and privacy creates a significant challenge. While about half of healthcare marketers say they've seen improved ROI with digital marketing, **57% struggle with audience targeting**—largely due to privacy regulations that limit tracking capabilities. The result? A gap between expectation and reality. Organizations invest in digital advertising, but without seamless operational integration, strong data strategies, and privacy-compliant personalization, they struggle to justify the spend.

To close the gap, healthcare marketers have to rethink their approach. This means investing in better technology, integrating marketing with patient access systems, and prioritizing first-party data strategies that balance personalization with compliance. In other words, build a digital-first foundation. If healthcare organizations fail to do this, their digital marketing efforts will become just another missed opportunity.

Percentage of respondents who are either unconfident or only somewhat confident in using data to adjust digital advertising strategy

70%



Percentage of respondents who cite technology as a major barrier to digital transformation

57%



Percentage of respondents who struggle with audience targeting due to privacy regulations

57%



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## Remove Ad Pixels, Not Insights

Freshpaint restores data flow and ROI for healthcare marketers

[See How](#) ↗

Your Website



# Building a Digital-First Foundation

For healthcare marketers, shifting to a digital-first strategy isn't just about adopting new platforms, it's about ensuring those platforms are both effective and compliant. In the past, healthcare organizations leaned heavily on third-party tracking tools like [Google Analytics](#) and [Meta's Pixel](#) to measure digital performance. But with [increasing regulatory scrutiny](#), such as the HHS guidance on online tracking, those traditional methods are no longer viable.

As Freshpaint's VP of Marketing, Ray Mina, put it during [a recent webinar](#):



"You can't improve digital marketing without taking care of the privacy aspects first."

For many healthcare marketers, this has been a rude awakening. [Baptist Health's](#) marketing lead experienced this firsthand. Lauren Anderson spent a year transitioning to Google Analytics 4, only to return from maternity leave and find the entire setup was no longer compliant. The challenge is clear: marketers need privacy-first solutions that allow them to track and optimize ad spend without exposing patient data.

## The New Approach: Privacy-First Performance Marketing

Rather than relying on ad platforms' built-in tracking tools, tools that freely collect and share patient data, healthcare organizations are turning to privacy-first data platforms. This approach allows them to:



**Maintain compliance** by removing direct tracking from Google, Meta, and other ad platforms.



**Gain full visibility** into the patient journey, from an ad click all the way to an attended appointment.



**Optimize ad spend** by feeding actual bottom-of-funnel outcomes back into ad platforms, improving performance and reducing costs.

## Why This Matters: From Guesswork to Data-Driven Decisions

One of the biggest issues in healthcare marketing has been the **inability to connect marketing performance to actual patient outcomes**. Many organizations have relied on proxy metrics, like form fills or call volume, to gauge success. However, these metrics only tell part of the story—often leaving a significant gap between marketing engagement and actual patient visits. Freshpaint's new approach bridges this gap by linking ad clicks directly to attended appointments. **The impact is significant:**

A healthcare group with a **\$2 million ad budget** reduced their cost per attended appointment by **81%**, saving \$380,000.



A larger organization with an **\$11 million ad budget** cut their acquisition costs by **54%**, unlocking \$6 million in potential reinvestment.

This shift isn't just about cost savings. It's about strategic reallocation. Instead of wasting spend on low-quality leads, marketers can reinvest in high-performing campaigns, optimize their audience targeting, and expand their reach.

## Smarter Campaigns, Better Results

The ability to track full-funnel performance also challenges long-held assumptions about digital advertising. For instance, one healthcare group assumed their lowest-cost ad campaign was their most effective until they realized that while it drove many form fills, it had a much lower attended appointment rate than another, slightly more expensive campaign.

By shifting spend toward higher-performing campaigns, they dramatically improved their marketing ROI. But campaign optimizations are just the beginning. As digital strategies evolve, the next few years will reshape healthcare marketing even further.

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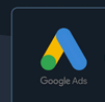
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Maximize marketing ROI, all while staying HIPAA-compliant

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# Looking Ahead: 3 Predictions for the Future of Healthcare Marketing

As the healthcare industry continues its digital transformation, here are three key predictions based on the insights we've gathered:

## More Reliance on Data-Driven Marketing

Healthcare marketers are increasingly turning to data-driven strategies—harnessing patient data, analytics, and AI—to personalize engagement while rigorously protecting privacy. First-party data (information collected directly from patients) has become especially critical as third-party data dwindles.

This has held true in other industries where studies show that brands using first-party data in key marketing functions achieved up to a **2.9x revenue uplift**. And in healthcare, because this data is collected with patients' consent and stored internally, organizations maintain more control over security and HIPAA compliance.

## Increased Focus on Patient Convenience

Patient convenience has become a top priority in healthcare marketing, as consumers increasingly choose providers who offer easy, digital access to care. In the past five years—accelerated by the pandemic—patients have embraced telemedicine, online scheduling, and mobile health apps at unprecedented rates.

As a result, healthcare organizations are marketing their digital front door: virtual visits, patient portals, and self-service tools that make accessing care more straightforward and faster.

This focus on convenience aligns with what patients want: **surveys find** that ease of using healthcare services and timely access are among the highest drivers of patient satisfaction. Yet many feel there's room for improvement. In a 2023 global survey, **only 37%** of consumers said their health system offers excellent access to care, suggesting a gap that marketing and digital teams are eager to fill.

**37%**

Percentage of consumers who say their health system offers excellent access to care



## Stronger Emphasis on Measurable ROI

With budgets tightening, healthcare marketers will need to demonstrate clear returns on their investments. Expect more precise tracking and attribution strategies to ensure that digital campaigns are delivering on their promises.

However, a common pitfall is relying too heavily on bottom-of-funnel channels like Google Search Ads. While search captures high-intent patients, it doesn't capture in-market demand. St. Elizabeth Healthcare saw a **92% increase in search conversions** after adding top-of-funnel media like streaming and digital out-of-home advertising.

This reinforces the need for a balanced, full-funnel approach that includes brand awareness, engagement, and conversion strategies.

# 92%

Percentage increase in search conversions observed by St. Elizabeth Healthcare after adding top-of-funnel media and digital out-of-home advertising.

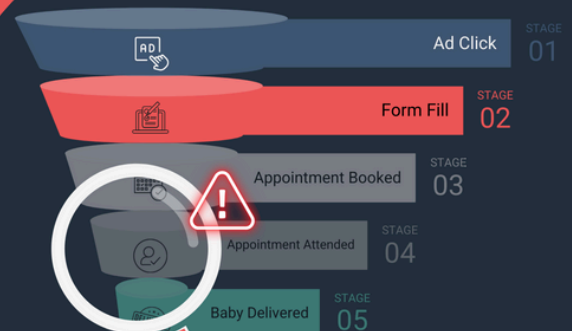


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UNLOCKING THE POWER OF THE FULL FUNNEL:

## How St. Elizabeth Healthcare is Transforming Consumer Marketing

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# The Future of Healthcare Marketing: Smarter, Not Louder

The shift to digital in healthcare marketing isn't just a response to changing trends—it's a natural evolution toward more efficient, patient-centered engagement. As budgets tighten and consumer expectations rise, organizations that lean into data-driven strategies and privacy-conscious solutions will be best positioned for success.

The future of healthcare marketing will be less about outspending the competition and more about making smarter, more strategic investments. By embracing innovation while staying mindful of compliance, healthcare marketers can create meaningful connections with patients and drive real results in this new digital landscape.

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## Achieve ROI Goals While Protecting Patient Privacy

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## About Freshpaint

Freshpaint's Healthcare Privacy Platform empowers healthcare companies to use the industry's best marketing tools while remaining compliant with a growing list of privacy regulations like HIPAA. Freshpaint replaces untrusted tracking technologies from tools like Google Analytics, Facebook, and Google Ads, then provides a governance layer that controls what data gets shared with those platforms.



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