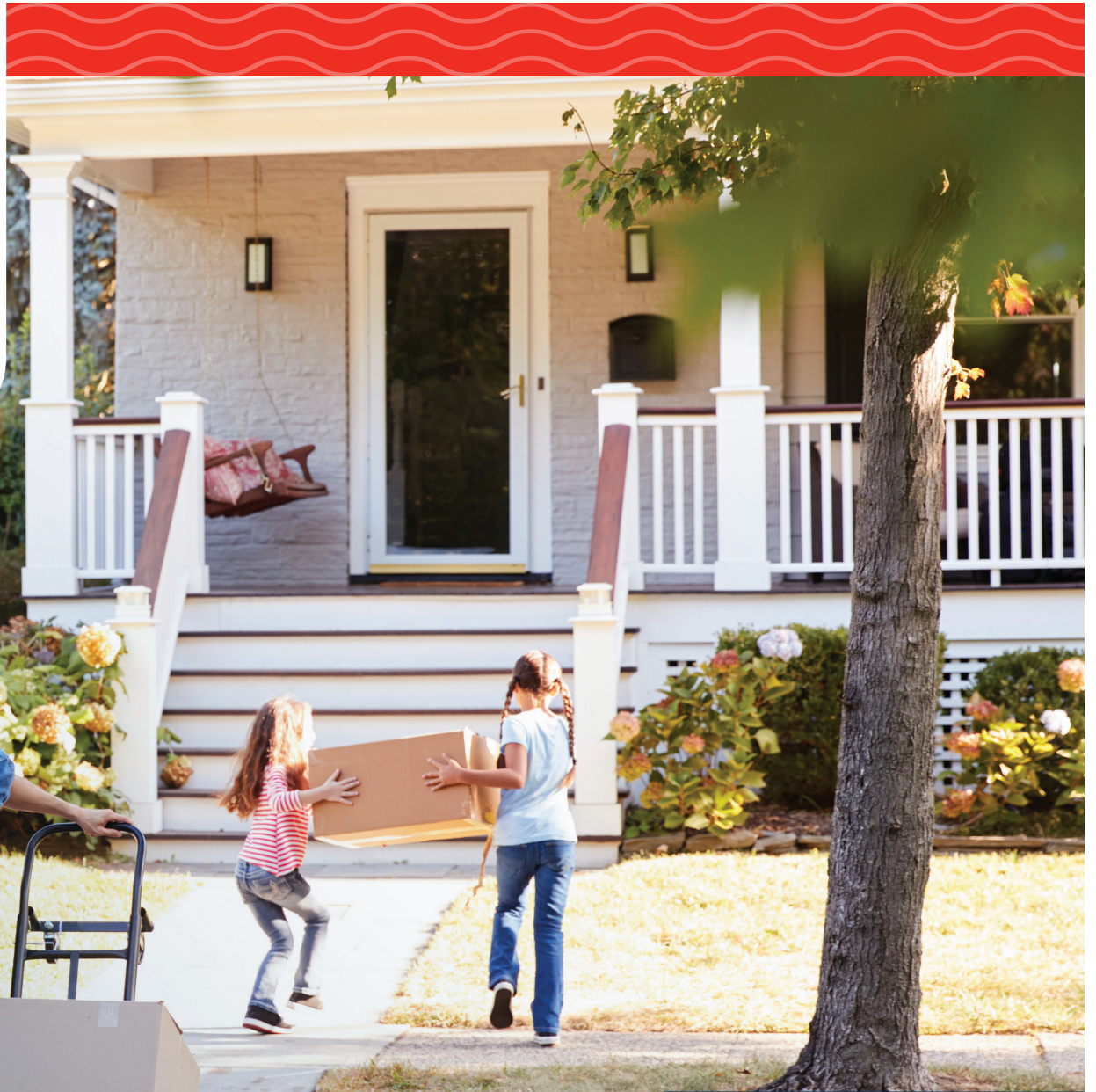


New Mover Marketing Benchmarks:

5 Years of Trends,
Insights & ROI



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Executive Summary

Few moments present a greater opportunity for patient acquisition than when someone moves. A new job, growing family, or fresh start means finding a new grocery store, new schools – and most importantly – a new trusted healthcare provider. For hospitals and health systems, New Mover Programs remain one of the most reliable ways to reach high-intent consumers at exactly the right time.

But how well do they really work?

At LionShare, we've managed, tracked, and optimized New Mover Programs for three decades. This report distills insights from more than 20 markets varying in size and geography over a five-year period – offering healthcare marketers clear benchmarks, proof of performance, and a roadmap for stronger ROI.

Key Insights at a Glance



Average response rate:

6%



Average individual utilization:

31%



Share of new patients:

37% of utilizers



Average ROI:

\$14.09 per dollar invested



Why New Movers Matter

How We Collected the Data

Relocation is one of the most significant triggers for healthcare decision-making. New movers are actively assessing where to shop, where to bank, and – crucially – where to go for care. Recent [research from Tebra](#) found that 69% of Americans struggled to find a new doctor after a move, and 30% were still without one two years later.

That creates a critical window of opportunity for hospitals and health systems. Timely, relevant outreach can mean the difference between becoming someone's healthcare home – or losing them to a competitor.

When done right, New Mover Programs do more than drive a first visit. They build trust, establish relationships, and lay the groundwork for long-term loyalty.



This report draws on analysis from over 35 campaigns spanning multiple states across the country. Each program included a control group, tracked response and encounter data, and measured lift in revenue and overall ROI.

Key Terms

Response rate

Percentage of marketed to recipients who claimed an offer online or by mail.

Revenue lift

Incremental revenue generated by the mailed group compared to the control.

Utilization rate

Percentage of the mailed households who completed a healthcare encounter.

ROI

Net return after marketing costs, representing true financial impact.

Results & Trends

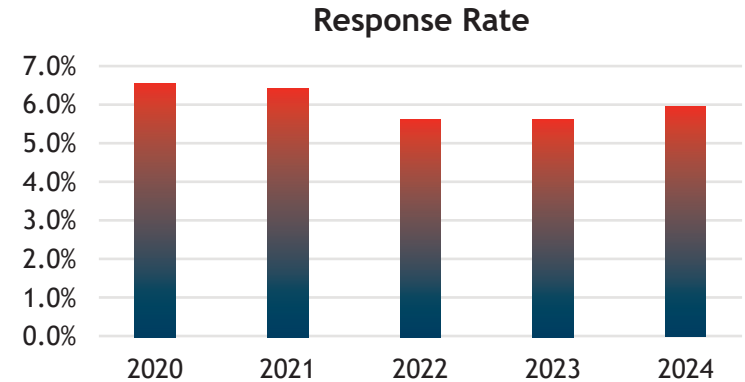
① Response Rates

The first indicator of program success is how many movers respond to the premium offer. Most programs featured the incentive of a free gift, prompting recipients to provide contact information for future communications.

5-Year Average: 6%

Yearly Breakdown:

- 2020 – 6.5%
- 2021 – 6.4%
- 2022 – 5.6%
- 2023 – 5.6%
- 2024 – 5.9%



What Drives Response

Offer type matters more than flash. Practical, useful items like first aid kits and digital thermometers consistently outperform novelty gifts. Seasonality and local market dynamics also influence engagement.



Results & Trends

2 Utilization Rates

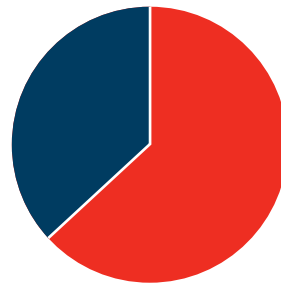
Response is one thing. Utilization – when patients show up for care – is what proves real value.

Average individual utilization: 31%

New patients: 37% of utilizers were brand new to the health system.

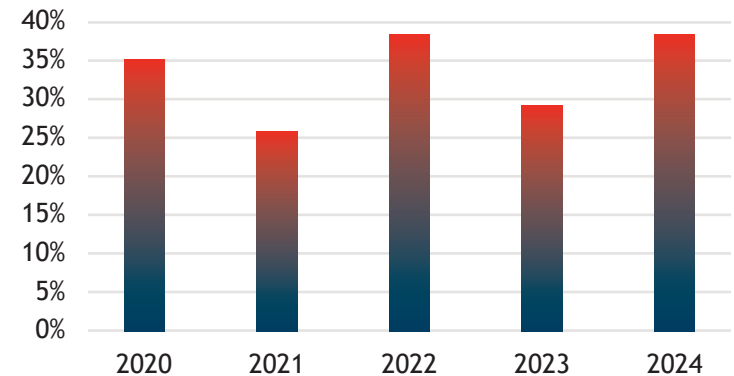
Yearly Breakdown:

- 2020 – 35%
- 2021 – 26%
- 2022 – 38%
- 2023 – 29%
- 2024 – 39%



■ Existing Patient ■ New Patient

Utilization Rate



What Impacts Utilization

Physician availability plays a critical role in converting movers into patients. In 2021, COVID-19-related access limitations drove utilization down across markets. As access rebounded, so did the performance.

Results & Trends

3 ROI Benchmarks

New Mover Programs consistently deliver measurable lift in revenue. While outliers exist, the trendline from 2020 to 2024 shows steady and meaningful growth and return on investment.

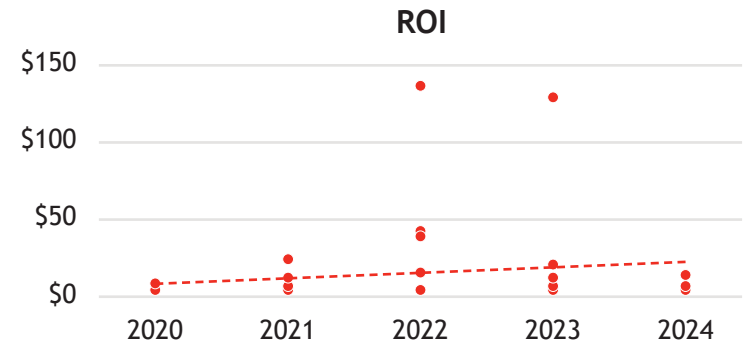
5-Year Average: \$14.09 ROI per \$1 invested.

Region Average ROI

West	\$1.98
South	\$2.45
Midwest	\$34.51
East	\$8.02

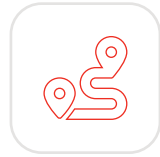
What Impacts ROI

Most programs have evolved from single mail drops to multi-drop, multi-channel journeys, which significantly boosts both response and financial returns. When taken together, the program cost, the number of touches (including nurturing), and the types of encounters seen can all impact the final ROI calculation.



Key Learnings & Actions

What distinguishes high-performing programs from the rest?
Our analysis points to five drivers of success:



1 Integrated Journeys

Combine direct mail with email, PPC, social, and display to reach movers wherever they are.



2 Personalization

Use the mover's name, location, and embedded maps to create a relevant, frictionless experience.



3 Relationship Building

Capture preferences and nurture ongoing communication beyond the first offer.



4 Relentless Testing

Continuously test creative, incentives, audience segments, and timing. Let data drive change.



5 Dashboard Reporting

Leverage interactive dashboards to connect responses to encounters and ROI for faster optimization and proof of performance.



Checklist: Is Your New Mover Program Optimized?

- ✓ Well-defined audience and fresh mover data
- ✓ Relevant, easy-to-redeem offer
- ✓ Multi-channel outreach plan
- ✓ Suppression lists to avoid current patients
- ✓ Control group and reporting dashboards

Conclusion & Next Steps

Five years of data confirm what we've long known: New Mover Programs work – when guided by strategy, data, and accountability. Use these benchmarks to shape your next campaign, defend your budget, and build marketing plans that drive measurable, lasting growth.

Whether you're looking to enhance an existing New Mover Program or launch one for the first time, LionShare's insights reveal what it takes to build, sustain, and scale a program that drives measurable, lasting growth.



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