2018

HEALTHCARE
DIGITAL MARKETING TRENDS
SURVEY

Chart a Path to Digital Marketing Success

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Executive Summary

We are excited to share this 2018 Healthcare Digital Marketing Trends Survey with you. Geonetric collaborated for the second year in a row with _eHealthcare Strategy & Trends_ to deliver the largest, most comprehensive look at the digital evolution of healthcare organizations available. In this groundbreaking survey, we heard from 249 healthcare provider organizations and 47 of your agency and vendor partners.

Our goal in delivering this report is to offer not only basic data to benchmark your organization, but also to deliver insights that will help you plan for the future of your digital operations. That's why you'll find a few unique elements in this report you won't find anywhere else:

- **Leader/Average/Laggard Analysis**—It's not enough to look at the average of all organizations to understand what you need to do to succeed. With our distinct benchmarking method that allows organizations to self-report where they are outperforming or underperforming, you'll see how leading organizations plan, budget, and execute differently from their counterparts.

- **Comparing the provider and vendor perspectives**—Perspectives from your industry peers are important, but we also find that the vendors and agencies that work with you may have a broader, and often different, understanding into what's most important to your digital success.

- **Ample insight**—Answer summaries to individual questions are always interesting, but the deeper revelations are often found at the intersection between different questions. That's why you'll find interesting insights when the questions are crossed. For example, when analyzing budget and team sizes relative to the number of beds or looking at the relationship between the forecasts for both overall marketing budgets and digital marketing budgets.

What insights await you on the following pages?

You'll have to read this report to find out, but here's a sampling of some of the interesting trends we're noticing:

- Content is hard, but also maybe the single most critical thing to digital success.

- Hospitals want patients—that's why they invest in digital marketing—but what's less clear is if they're finding success at getting those patients.

- New challenges are emerging in the area of operational integration and digital strategy.

- The new hot jobs in healthcare digital marketing are in content development, customer relationship management (CRM), social media, and marketing automation.

- Marketing investment continues to shift from traditional media to digital.

- The website redesign cycle has been slow in recent years (4-5 year cycle), but there's a huge wave of redesigns planned and underway right now.

- Web personalization is difficult to execute and continues to be more hype than game changing.

What will you find?

As you plan for 2018 and beyond, this guide will not only help you benchmark where you stand today but also better plan for future initiatives. We're excited to see what other insights you uncover as you review this report and use the data to make informed decisions at your organization.

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Using the Data

By segmenting the data by organizations who are beating the competition and those that are falling behind, we can identify the investments and activities of those organizations that are finding success in digital marketing.

For this survey, as in previous years, we asked respondents if they were ahead or behind their competitors in these seven key areas: website design, website content, social media, content marketing, search engine optimization (SEO), digital advertising, and website features and functionality. This year, we got more specific, asking if the respondent's organization was slightly ahead or behind or significantly ahead or behind. Then, we subtracted the number of "behinds" from the number of "aheads" (+/-2 for significantly, +/-1 for slightly). We encourage readers to think about where you fall.

This year we saw more organizations label themselves as outperforming their competitors than those saying that they are falling behind. As a result, we skewed the groups a bit to the positive to capture the average, leader, and laggard respondents.

- **Leaders:** Self-selected that they are ahead of their competition in digital marketing efforts (Net ahead-behind > 5; 18.4% of respondents).
- **Average:** (Net ahead-behind between -3 and 5; 46.9% of respondents).
- **Laggards:** Self-selected that they are behind their competition in digital marketing efforts (Net ahead-behind < -3; 34.7% of respondents).
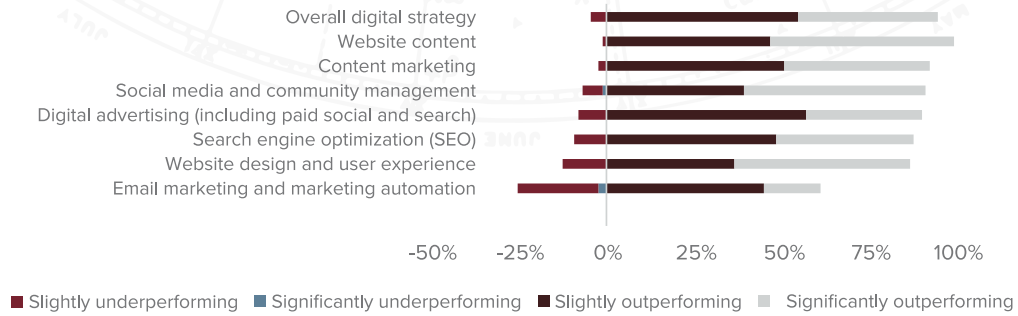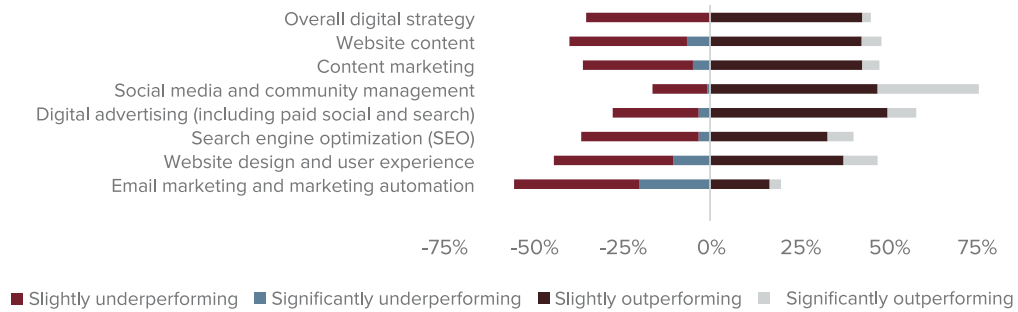
Leader/Laggard Score Distribution
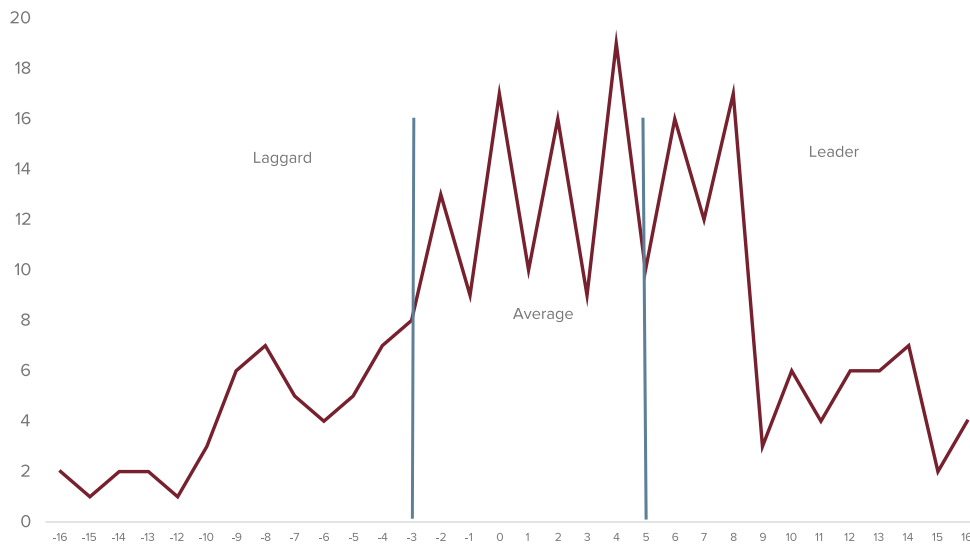
Leaders, Average, and Laggards

Since the leader/laggard segments are defined by the number of items where the organization is ahead or behind, it's not surprising that leaders report doing better in most areas, particularly content. Overall, respondents feel best about their work in social media, and they all feel least confident in email marketing and marketing automation.

Ahead/Behind—Leaders

Overall digital strategy	
Website content	
Content marketing	
Social media and community management	
Digital advertising (including paid social and search)	
Search engine optimization (SEO)	
Website design and user experience	
Email marketing and marketing automation	

-50% -25% 0% 25% 50% 75% 100%

■ Slightly underperforming   ■ Significantly underperforming   ■ Slightly outperforming   ▫ Significantly outperforming

Ahead/Behind—Average

Overall digital strategy	
Website content	
Content marketing	
Social media and community management	
Digital advertising (including paid social and search)	
Search engine optimization (SEO)	
Website design and user experience	
Email marketing and marketing automation	

-75% -50% -25% 0% 25% 50% 75%

■ Slightly underperforming   ■ Significantly underperforming   ■ Slightly outperforming   ▫ Significantly outperforming

Ahead/Behind—Laggards

Overall digital strategy	
Website content	
Content marketing	
Social media and community management	
Digital advertising (including paid social and search)	
Search engine optimization (SEO)	
Website design and user experience	
Email marketing and marketing automation	

-100% -75% -50% -25% 0% 25% 50%

■ Slightly underperforming   ■ Significantly underperforming   ■ Slightly outperforming   ▫ Significantly outperforming

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Digital Marketing Budgets

Digital Marketing Budgets

It's important to understand what other healthcare organizations are spending on digital marketing to benchmark your efforts. As you'll see in this section:

- Median annual digital marketing investments are between $50,000 and $300,000, while a few outliers pull the average annual investments much higher.
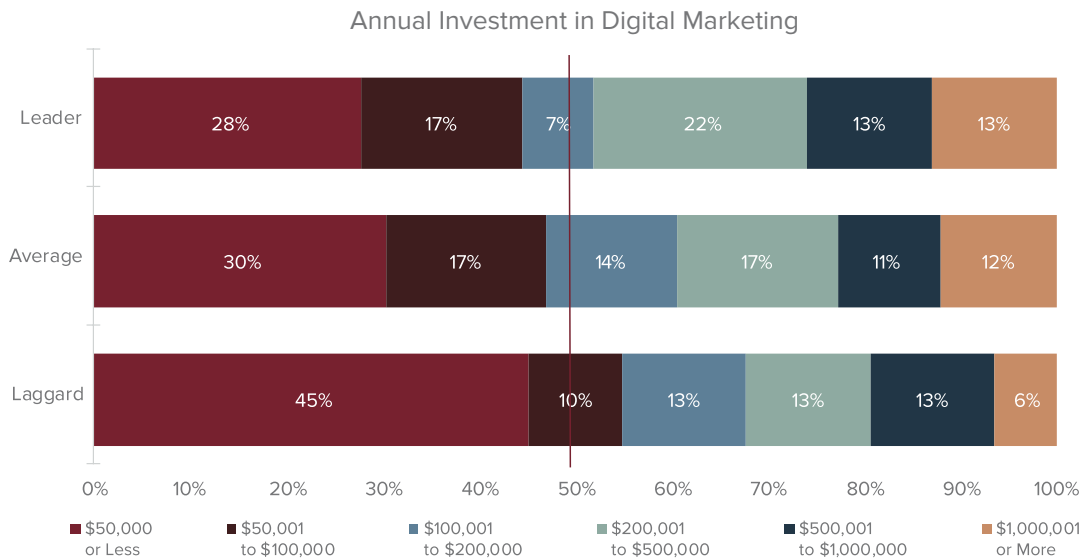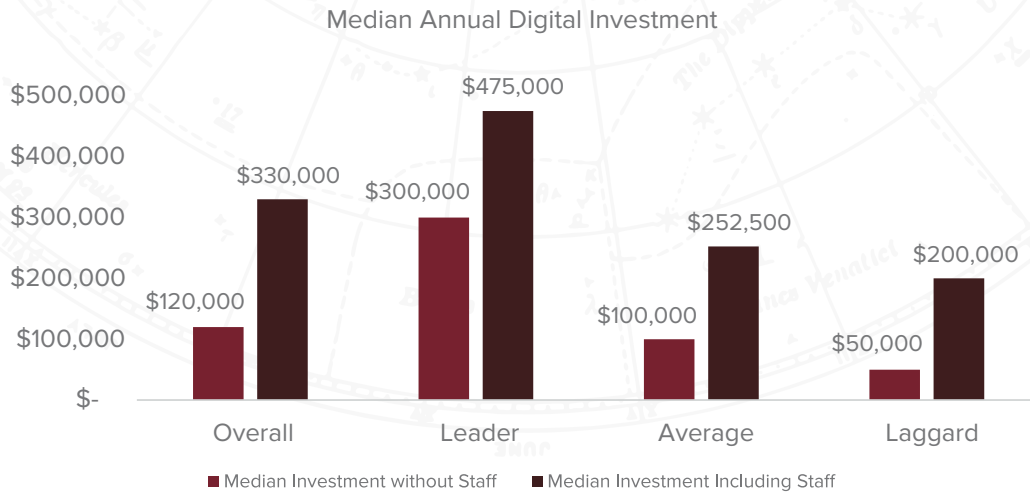
- Leaders outspend their counterparts, with 13% of leaders spending over $1 million on digital marketing annually.

- Overall, 59% of respondents expect their digital marketing budgets to increase in the next 12 months, with only 5% expecting a decrease in digital budgets.

- More than half (54%) of digital budgets are growing in organizations where overall budgets are remaining the same, continuing the trend from previous years of investments shifting from traditional to digital.

Average Annual Investment

Leaders slightly outspend their average counterparts, with 13% of leaders spending over $1 million on digital marketing annually. Almost half of laggards report spending $50,000 or less on digital marketing. Budgets at the high end (some up to $20 million) pull the averages up. While mean budgets for the respondents range from $461,000 to $841,000, median budgets are only between $50,000 and $300,000.

Annual Investment in Digital Marketing

	$50,000 or Less	$50,001 to $100,000	$100,001 to $200,000	$200,001 to $500,000	$500,001 to $1,000,000	$1,000,001 or More
Leader	28%	17%	7%	22%	13%	13%
Average	30%	17%	14%	17%	11%	12%
Laggard	45%	10%	13%	13%	13%	6%

Median Annual Digital Investment

	Overall	Leader	Average	Laggard
Median Investment without Staff	$120,000	$300,000	$100,000	$50,000
Median Investment Including Staff	$330,000	$475,000	$252,500	$200,000

■ Median Investment without Staff ■ Median Investment Including Staff

Average Annual Investment Per Bed

Total expenditure for leaders is roughly twice that of other groups at $1.4 million. This is, in part, because of the larger size of these organizations. Looking at investments on a per bed basis attempts 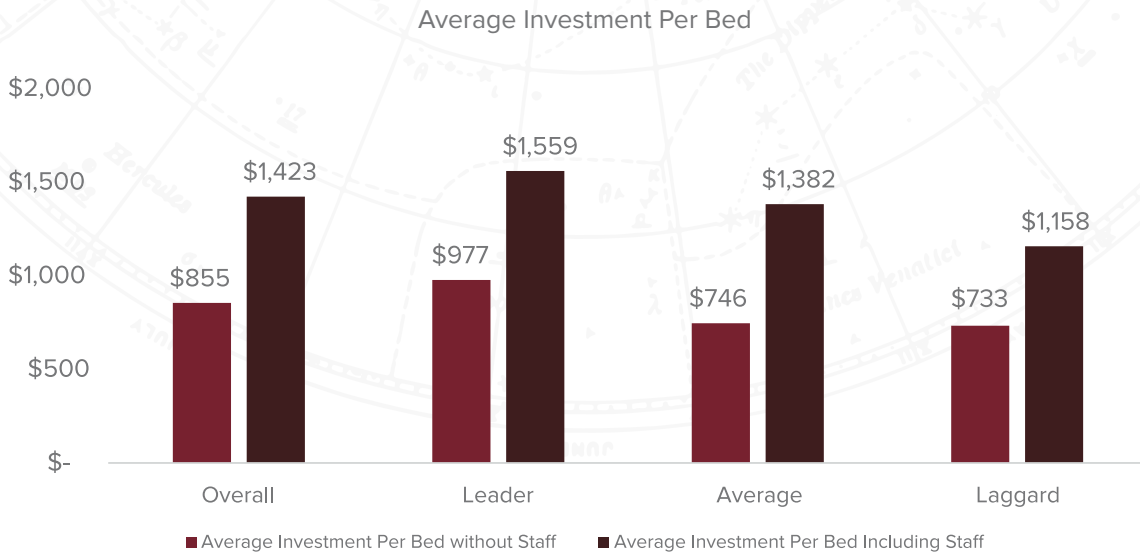to even the playing field.* Through this lens there is a clear correlation between greater investment (relative to size) and leadership in digital efforts. Also interesting to note this year, the ratio of staff expense and direct investment is nearly identical for leading organizations and laggards. Average organizations, in contrast, are trying to close the gap with leaders by adding additional staff resources rather than greater investment in tools and outside partners.

Average Annual Digital Investment

	Overall	Leader	Average	Laggard
Average Investment without Staff	$581,097	$890,763	$367,112	$499,667
Average Investment Including Staff	$967,417	$1,421,684	$679,878	$788,952

■ Average Investment without Staff ■ Average Investment Including Staff
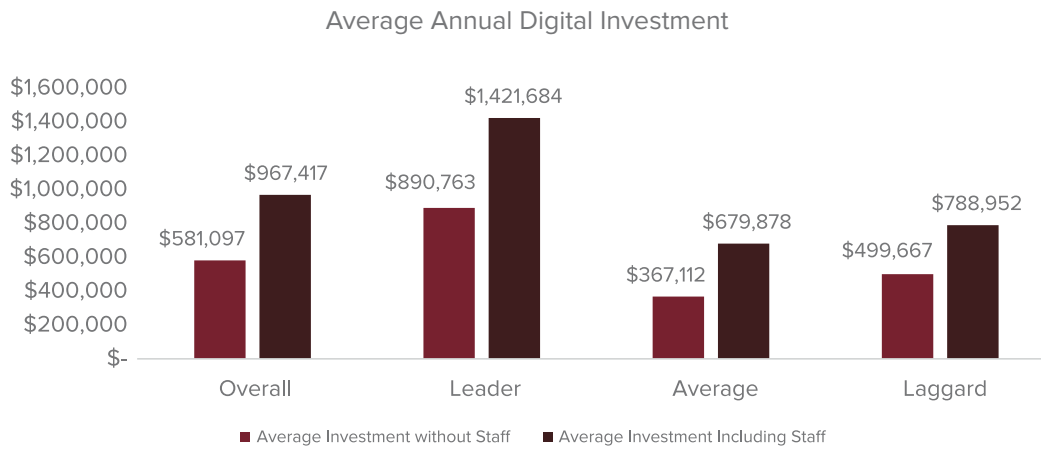
*For these ratios, only respondents who provided budget, staffing, and bed count are included in the analysis. Those organizations that indicated no beds were removed.

Average Investment Per Bed

	Overall	Leader	Average	Laggard
Average Investment Per Bed without Staff	$855	$977	$746	$733
Average Investment Per Bed Including Staff	$1,423	$1,559	$1,382	$1,158

Average Investment Per Bed without Staff ■ **Average Investment Per Bed Including Staff** ■

Percentage of Budget Dedicated to Digital

Leaders invest a greater portion of their marketing budgets on digital, they are only allocating 2% more of their overall marketing budgets than their average counterparts. When comparing this year's results to responses from 2017, leaders increased by 3%, average increased by 6%, and laggards increased by 5%, indicating average and laggards are closing the investment gap.

What percentage of your overall marketing budget is dedicated to digital marketing?

Leader	Average	Laggard
32%	30%	23%
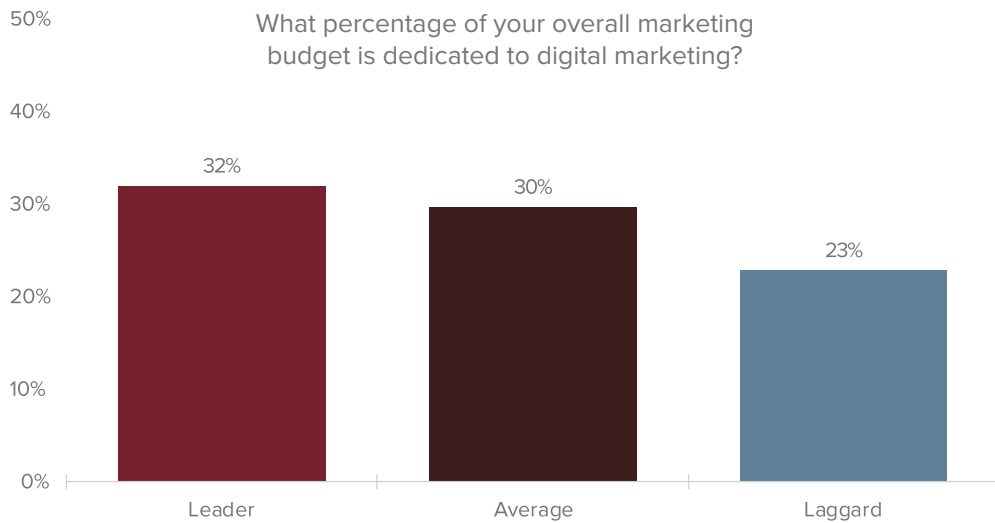
Digital Budget Forecasts

Overall, 59% of respondents expect their digital marketing budgets to increase in the next 12 months, with only 5% expecting a decrease in their digital budgets. When looking at it by segments, the further behind an organization is, the more likely they are growing their digital budgets. For example, 67% of laggards expect to see an increase in their digital budgets compared to 53% of leaders. Agency partners are even more confident about the growth in their clients' budgets than healthcare marketers are about their own budgets.

What do you expect to happen to your digital marketing budget in the next 12 months?

Unsure 4%
Decrease 5%
Remain the same 32%
Increase 59%
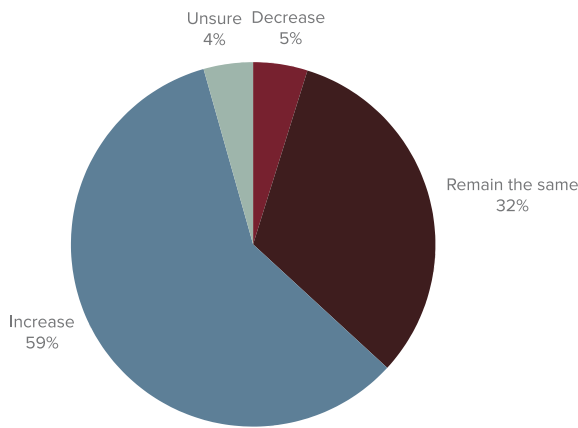
What do you expect to happen to your clients' digital marketing budgets in the next 12 months?

Unsure 11%
Decrease 2%
Remain the same 24%
Increase 63%
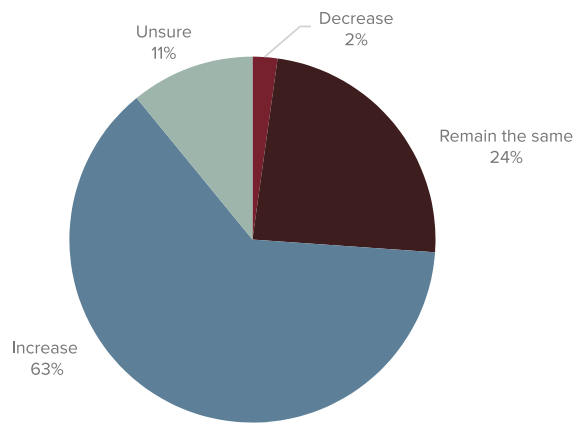
What do you expect to happen to your digital marketing budget in the next 12 months?

	Leader	Average	Laggard
Decrease	6%	4%	5%
Remain the same	38%	31%	23%
Increase	53%	59%	67%
Unsure	3%	6%	5%

Overall Marketing Budget

More than half of marketing budgets are remaining stagnant and one in six are actually expected to decrease in the coming year. For organizations that are seeing an increase in overall budget, they are more likely to also see an increase in digital budgets as well. Continuing to see the trend from previous years holds true again this year with a shift of overall marketing budget from traditional marketing to digital. More than half (54%) of digital budgets are growing in organizations where overall budgets are remaining the same. And nearly as many (43%) digital budgets are increasing, even when overall marketing budgets are decreasing.

What do you expect to happen to your overall digital marketing budget in the next 12 months?

Unsure
6%

Decrease
16%

Increase
24%
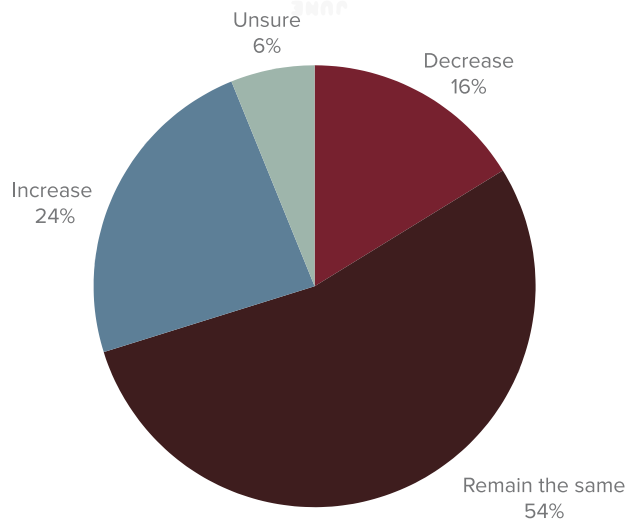
Remain the same
54%

What do you expect to happen to your overall marketing budget in the next 12 months?

		Decrease	Remain the same	Increase	Unsure
What do you expect to happen to your digital marketing budget in the next 12 months?	Decrease	27%	1%	0%	0%
	Remain the same	27%	45%	11%	14%
	Increase	43%	54%	85%	43%
	Unsure	3%	1%	4%	43%

Digital Budgets by Tactic

When looking at budget changes by tactic, cuts are minimal. All of the functional areas surveyed expect to see investments by a significant number of organizations, either in budget or staff. Digital advertising has the strongest level of investment, with 50% indicating an increase in either budget or staff for this tactic. When looking at the investments by leader and laggard segments, laggards are somewhat more likely to be increasing their investments in content marketing and SEO than leaders and average organizations.

Expected Change in Investment Including Staff

Tactic	Decrease	Remain the same	Increase	Unsure
Digital advertising	3%	41%	50%	6%
Website design and user experience	3%	51%	40%	5%
Website content	3%	53%	37%	7%
Email marketing and marketing automation	2%	52%	37%	9%
Content marketing	2%	60%	32%	6%
Search engine optimization (SEO)	3%	59%	31%	7%
Social media and community management	2%	62%	30%	6%

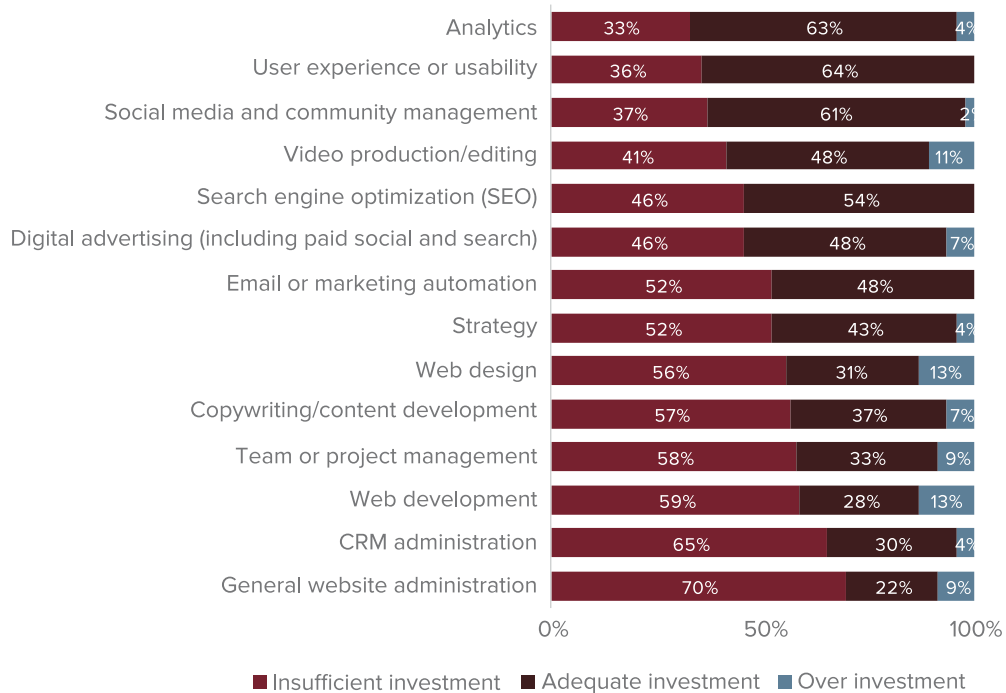Legend: ■ Decrease ■ Remain the same ■ Increase ■ Unsure
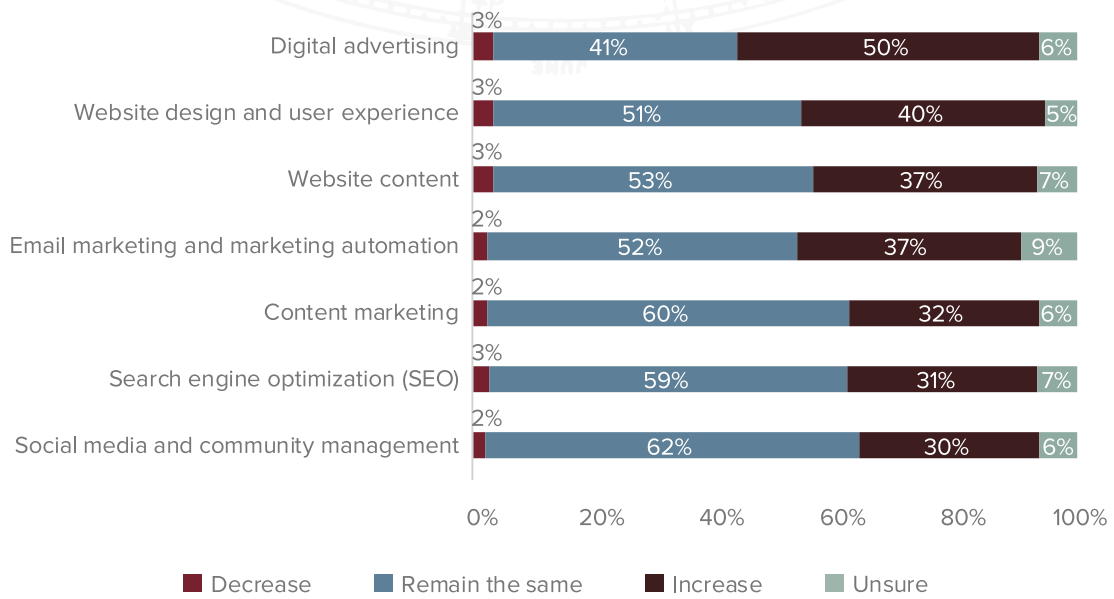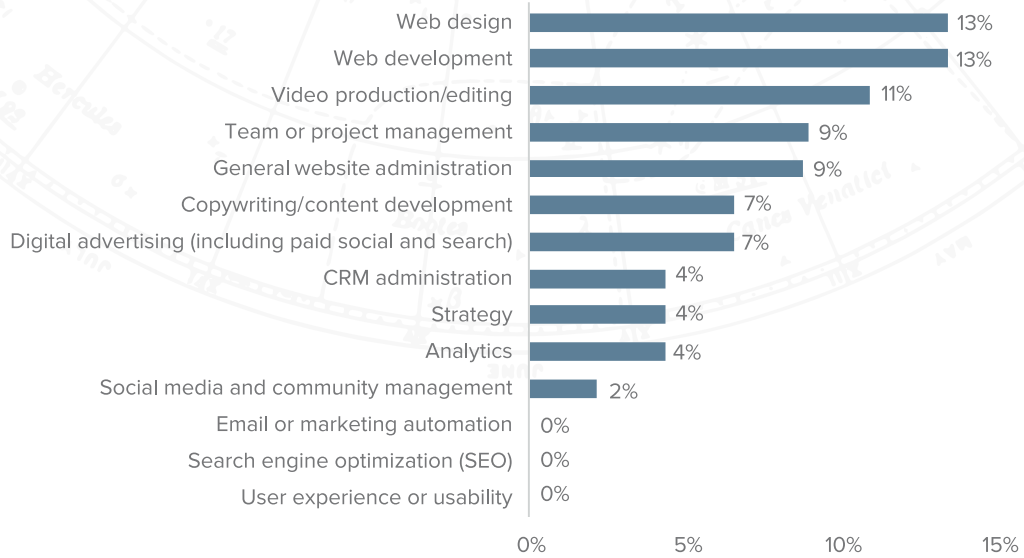
Agency Perspective: Overall Investments

When asked where they see their clients over-investing, agencies and vendors reported web design and development, video production, project management, and general website administration at the top of the list. It's important to note that while some agency partners see these as places of over-investment, others see these same areas—particularly general website administration and web design and development—as under-invested.

While many organizations are looking to more advanced capabilities in analytics and user experience, agencies see greater need for more investment by their clients in core areas such as general website and CRM administration, web development, project management, and content development.

Overall Level of Clients' Investments (Agency/Vendor)

Category	Insufficient investment	Adequate investment	Over investment
Analytics	33%	63%	4%
User experience or usability	36%	64%	
Social media and community management	37%	61%	2%
Video production/editing	41%	48%	11%
Search engine optimization (SEO)	46%	54%	
Digital advertising (including paid social and search)	46%	48%	7%
Email or marketing automation	52%	48%	
Strategy	52%	43%	4%
Web design	56%	31%	13%
Copywriting/content development	57%	37%	7%
Team or project management	58%	33%	9%
Web development	59%	28%	13%
CRM administration	65%	30%	4%
General website administration	70%	22%	9%

■ Insufficient investment ■ Adequate investment ■ Over investment

Areas of Client Over-Investment

Category	Percentage
Web design	13%
Web development	13%
Video production/editing	11%
Team or project management	9%
General website administration	9%
Copywriting/content development	7%
Digital advertising (including paid social and search)	7%
CRM administration	4%
Strategy	4%
Analytics	4%
Social media and community management	2%
Email or marketing automation	0%
Search engine optimization (SEO)	0%
User experience or usability	0%

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Digital Marketing Teams

Digital Marketing Teams

How are other healthcare marketing teams structured? It's one of the most pressing questions today's digital teams face, especially as they look to realign, hire more staff, or supplement their team with resources from partner agencies and vendors. From average full-time equivalents (FTEs) to predicted staffing changes, you'll find the answers you need here, such as:
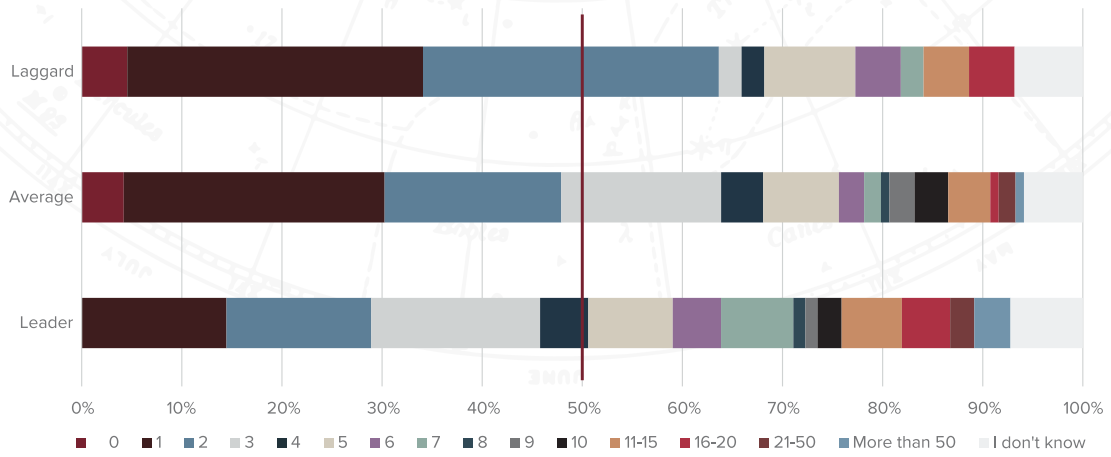
- While teams average nearly 13 FTEs for leaders, over six for average, and nearly four for laggards, the distribution of team size is more complicated. Median team sizes are only four for leaders, three for average, and two for laggards.

- Relative to their team sizes, leaders invest particularly heavily on staff for strategy and analytics and more lightly in social media, SEO, and copywriting.

- Across all organizations, content development and analytics/CRM administration are the highest predicted growth areas.

- The areas most often completely outsourced are web development, web design, and video production.
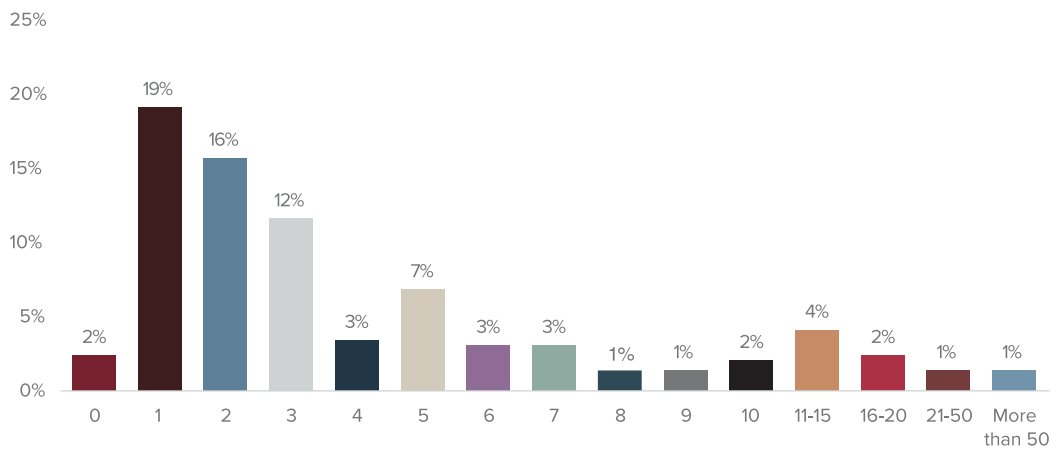
Team Size by Leader/Laggard

With more than 12 team members reported, leaders have larger overall teams dedicated to digital than their average and laggard counterparts, yet they tend to be much larger organizations as well. Relative to their size, laggards have less staff than leaders or average organizations. This shows a change from last year's data, where average and laggards dedicated 3.48 and 3.13, respectively. Yet again, average organizations are closing the gap. While teams average nearly 13 FTEs for leaders, over six for average, and nearly four for laggards, the distribution of team sizes is more complicated. Median team sizes are only four for leaders, three for average, and two for laggards.

Average Digital Marketing Team FTEs

Leader	Average	Laggard
12.88	6.51	3.79
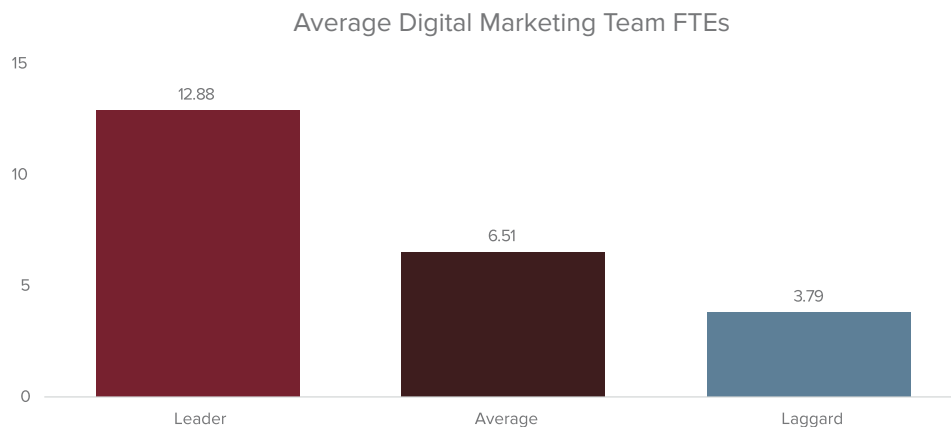
Digital Marketing Team Size Distribution by Leader/Laggard

Legend: 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11-15 | 16-20 | 21-50 | More than 50 | I don't know

Digital Marketing Team Size Distribution

Team Size	Percentage
0	2%
1	19%
2	16%
3	12%
4	3%
5	7%
6	3%
7	3%
8	1%
9	1%
10	2%
11-15	4%
16-20	2%
21-50	1%
More than 50	1%

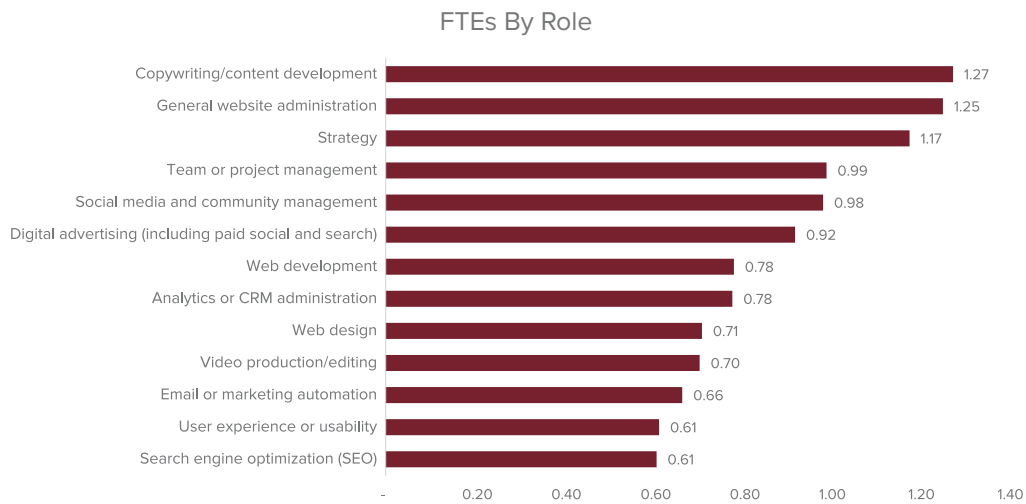## Team Size Per Bed

When looking at staffing on a per-bed basis, organizations overall have .76 FTEs per 100 beds. In other words, a 400 bed organization would have approximately three FTEs. Relative to their size, laggards have less staff than leaders or average organizations on a per bed basis, with one FTE per every 175 beds.

FTEs Per 100 Beds

	Overall	Leader	Average	Laggard
	0.76	0.78	0.85	0.57
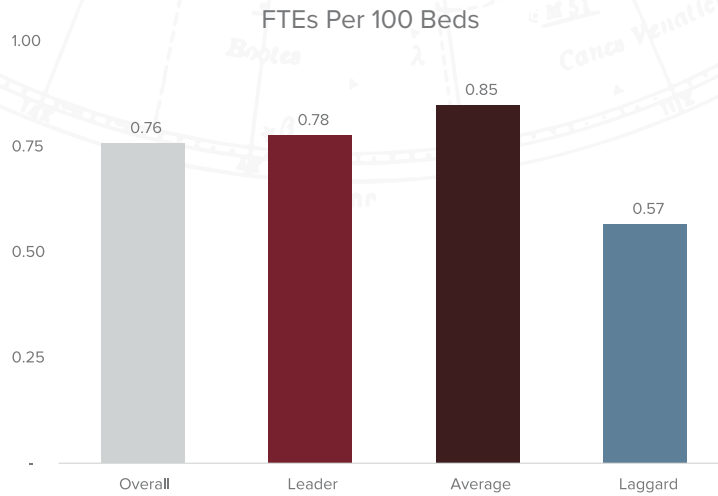
FTEs Per Role

Across all organizations, content, general website administration, and strategy top the roles with at least one, if not more, full-time team members assigned to the role. Email, user experience/usability, and SEO are the roles with the least amount of dedicated internal support.

FTEs By Role

| Role	FTEs
Copywriting/content development	1.27
General website administration	1.25
Strategy	1.17
Team or project management	0.99
Social media and community management	0.98
Digital advertising (including paid social and search)	0.92
Web development	0.78
Analytics or CRM administration	0.78
Web design	0.71
Video production/editing	0.70
Email or marketing automation	0.66
User experience or usability	0.61
Search engine optimization (SEO)	0.61

FTEs Per Role Leader/Laggard

Not surprisingly, leaders have more staff in each role than average and laggard organizations. Relative to their team sizes, leaders invest particularly heavily on staff for strategy and analytics and more lightly in social media, SEO, and copywriting. In contrast, average organizations invest less in strategy, while putting more of their resources into usability. Laggards put more resources into content development and SEO, and less into usability and strategy.

FTEs Per Role by Leader/Laggard				
	Leaders	Average	Laggards	Overall
Search engine optimization (SEO)	0.76	0.55	0.49	0.61
User experience or usability	0.82	0.57	0.32	0.61
Email or marketing automation	0.86	0.58	0.52	0.66
Video production/editing	0.97	0.62	0.48	0.70
Web design	0.96	0.64	0.47	0.71
Analytics or CRM administration	1.12	0.66	0.47	0.78
Web development	1.03	0.71	0.51	0.78
Digital advertising (including paid social and search)	1.21	0.84	0.57	0.92
Social media and community management	1.20	0.90	0.77	0.98
Team or project management	1.39	0.82	0.65	0.99
Strategy	1.79	0.92	0.69	1.17
General website administration	1.67	1.08	0.92	1.25
Copywriting/content development	1.57	1.15	1.03	1.27

Staffing Outlook

A net average (increase minus decrease) of 9% of organizations are planning to add staff in the coming year. Across all organizations, content development and analytics/CRM administration are the highest predicted growth areas.

Expected Staff Change in the Next 12 Months by Role

■ Decrease staff   ■ Increase staff
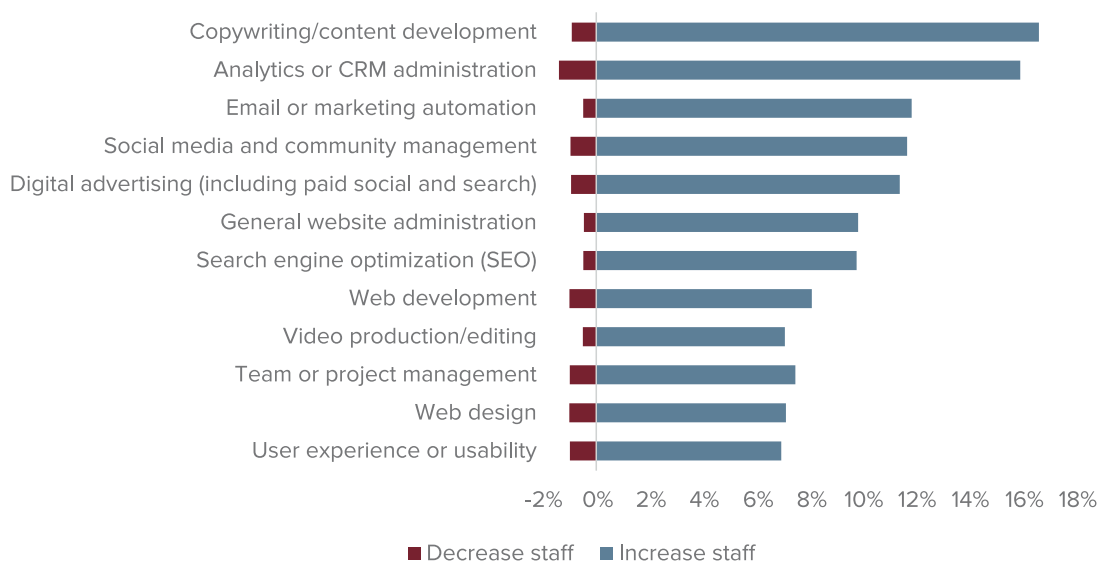
Staffing Outlook by Leader/Laggard

Average respondents are the most likely to have plans to add staff. Leaders are generally least likely with the notable exception of content development. Average respondents are also planning to add staff in email or marketing automation, social media, SEO, and website administration. Laggards are looking to add staff in many categories including digital advertising, social media, and email or marketing automation.

Intent to Increase Staff by Role and Leader/Laggard

Legend: ■ Overall ■ Laggards ■ Average ■ Leaders
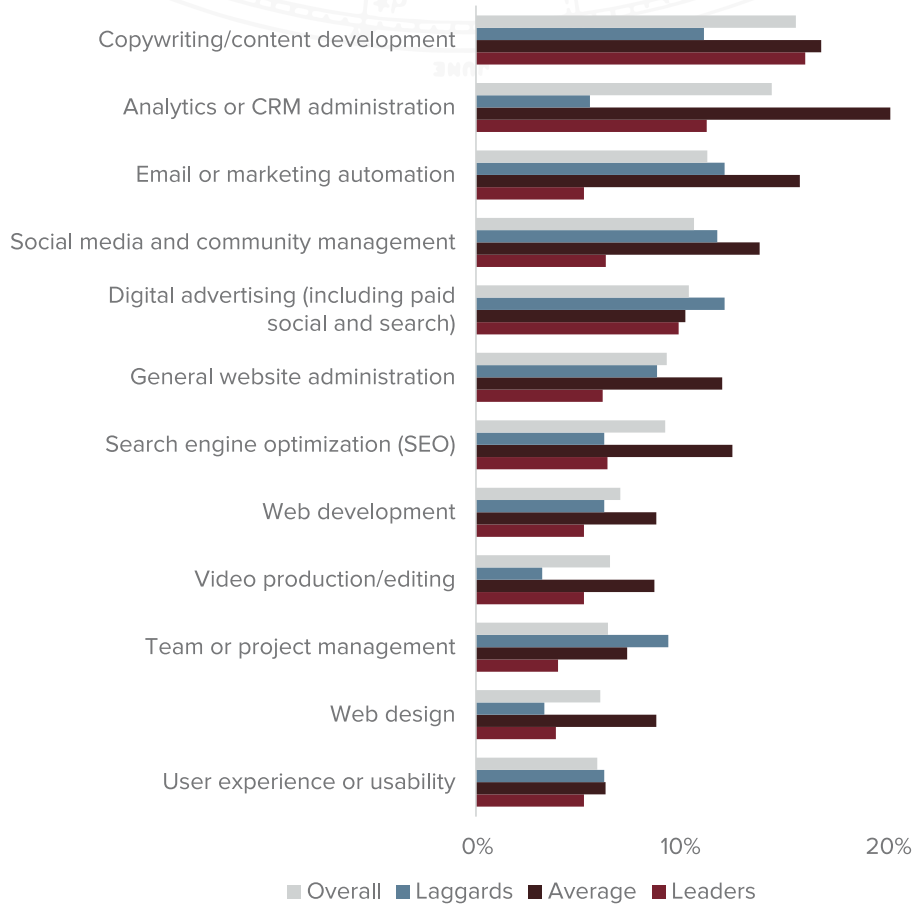
External Resources

Across all organizations, the areas most often completely outsourced are web development, web design, and video production. There are other areas where healthcare organizations want some external assistance, particularly in content development and strategy. Organizations are most likely to rely completely internally for project management and social media.
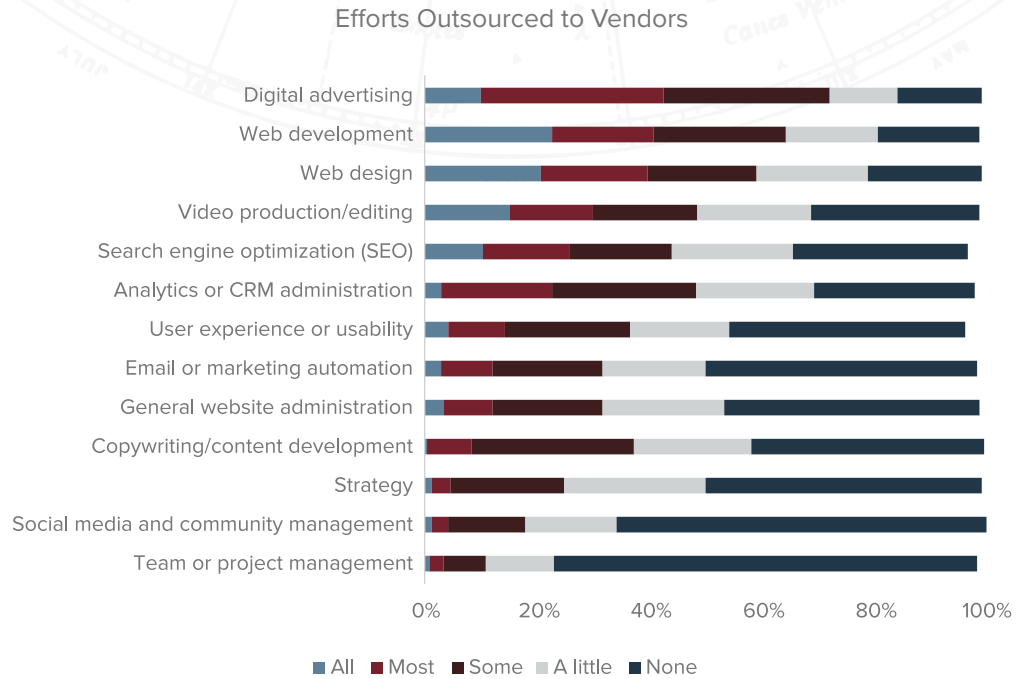
Efforts Outsourced to Vendors

Legend: ■ All ■ Most ■ Some ■ A little ■ None

Categories (top to bottom):
- Digital advertising
- Web development
- Web design
- Video production/editing
- Search engine optimization (SEO)
- Analytics or CRM administration
- User experience or usability
- Email or marketing automation
- General website administration
- Copywriting/content development
- Strategy
- Social media and community management
- Team or project management

X-axis: 0% 20% 40% 60% 80% 100%

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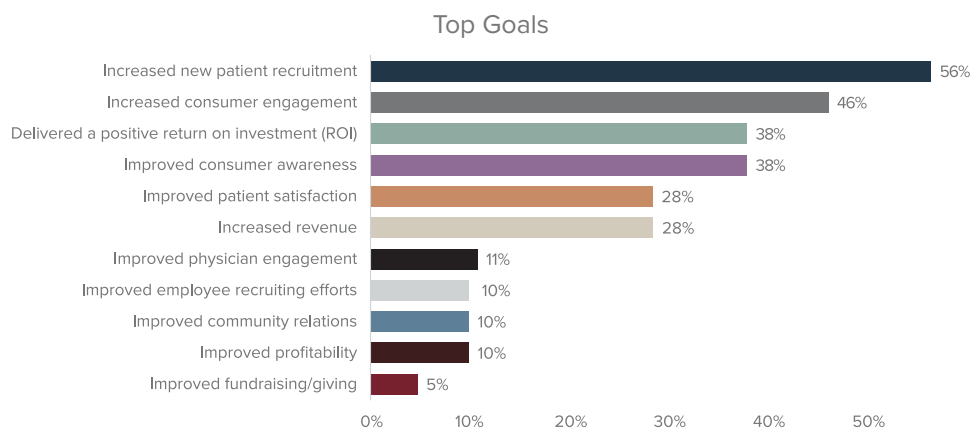SURVEY

Digital Marketing Strategy

Digital Marketing Strategy

Healthcare organizations have certainly embraced digital marketing, with digital tactics garnering bigger and bigger percentages of healthcare marketers' budgets. Today's savvy teams are now challenged to demonstrate the impact of their tactics on broader organizational goals. Keep reading to learn the latest trends in digital strategy and what challenges are keeping marketers up at night, including:

- Across all organizations, increased new patient recruitment, increased consumer awareness and engagement, and delivering a positive return on investment (ROI) are the top digital goals.
- The three areas organizations are most able to demonstrate the impact of digital marketing efforts are through improved consumer awareness, improved consumer engagement, and improved community relations.
- Leaders clearly outpace average and laggard organizations in their use of real-time marketing dashboards.
- Leaders see the inability to support online transactions with offline operations as a much bigger concern than other organizations.

Top Digital Goals

Increased new patient recruitment, increased consumer awareness and engagement, and delivering a positive ROI are the top goals for respondents' digital marketing efforts in the next 12 months. When looking at the data by segment, laggards are under pressure to increase the number of new patients in the door, as well as to increase consumer engagement. Interestingly, these organizations report the least focus on delivering a positive ROI. This may indicate a desire on digital marketing's part to show the value delivered through patient volume when they lack access to the tools (such as a sophisticated CRM system) or tracking capabilities to translate that patient volume to ROI.

Top Goals

Goal	Percentage
Increased new patient recruitment	56%
Increased consumer engagement	46%
Delivered a positive return on investment (ROI)	38%
Improved consumer awareness	38%
Improved patient satisfaction	28%
Increased revenue	28%
Improved physician engagement	11%
Improved employee recruiting efforts	10%
Improved community relations	10%
Improved profitability	10%
Improved fundraising/giving	5%

Ability to Demonstrate Impact

Leaders are more likely to agree that they can demonstrate the impact of their digital marketing efforts than average and laggards. Of all the statements, leaders and laggards both most strongly agree with the ability to demonstrate impact on improved consumer awareness; however, the degree of agreement varies significantly—leaders at 51% and laggards at 19%. Notably, 53% of leaders "somewhat agree" that they are able to demonstrate a positive ROI, while only 40% of average organizations and 37% of laggards say they "somewhat agree." The top statements receiving the most favorable responses ("strongly agree" plus "somewhat agree") are improved consumer awareness (84%), improved consumer engagement (84%), and improved community relations (74%).
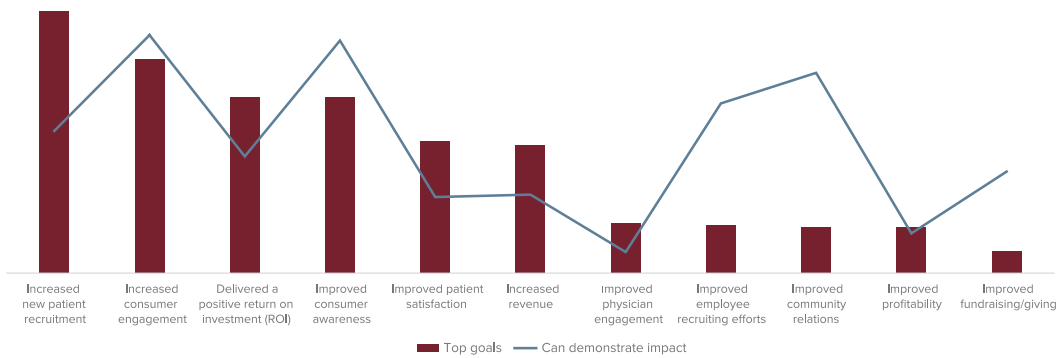
Our organization is able to demonstrate how digital marketing has impacted the following measurements:

Legend: ■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree
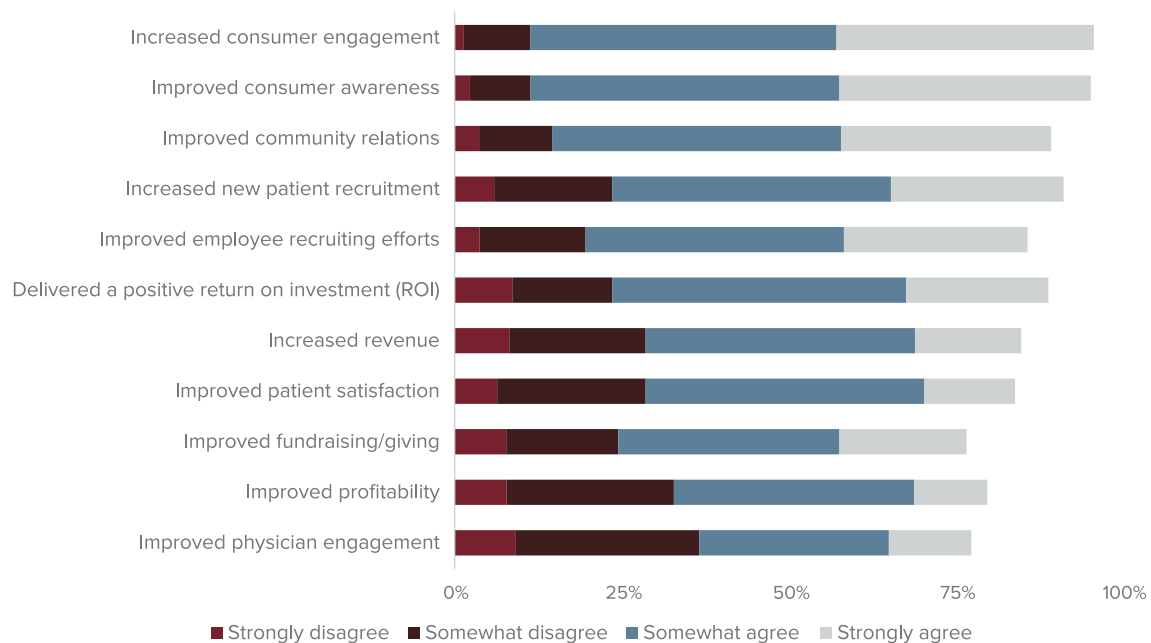
Top Goals vs. Ability to Demonstrate Impact

When looking at reported top goals with ability to demonstrate digital marketing's impact, some interesting findings emerge. Some goals—such as employee recruiting, community relations, and fundraising aren't ranked as high in priority, yet marketing teams are better able to demonstrate impact due to the fact the transaction usually occurs online, making it easier to measure and attribute to the web. Other areas that respondents indicate are both important and able to be tied back to digital marketing are consumer engagement and consumer awareness. These items, while critically important, are actually relatively soft measurements in this context. There are also areas where there's a gap between importance and ability to demonstrate—especially around patient recruitment, delivering ROI, patient satisfaction, and increased revenue. These require hard measures, transactions are often concluded offline, and there can be multi-channel attribution or other issues that make it hard to prove impact reliably and consistently.

Top Goals vs. Ability to Demonstrate Impact

Increased new patient recruitment | Increased consumer engagement | Delivered a positive return on investment (ROI) | Improved consumer awareness | Improved patient satisfaction | Increased revenue | Improved physician engagement | Improved employee recruiting efforts | Improved community relations | Improved profitability | Improved fundraising/giving
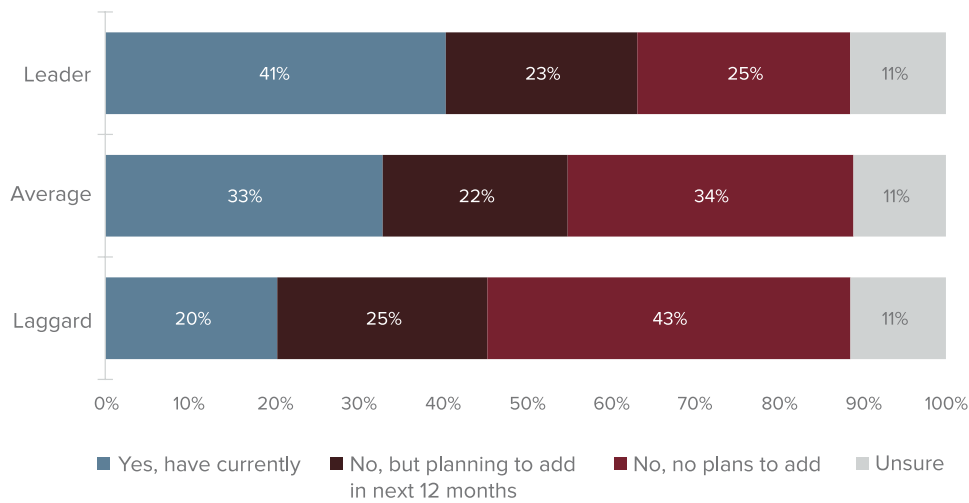
■ Top goals — Can demonstrate impact

Real-time Marketing Dashboards

Leaders clearly outpace average and laggard organizations in their use of real-time marketing dashboards. Interestingly, 43% of laggards report that they have no plans to add dashboards, while 34% of average organizations and 25% of leaders say the same. The 25% of laggards who report they don't currently use dashboards but plan to add them in the next 12 months correlates closely to the 27% of laggards that also indicate that delivering a positive ROI is one of their most critical goals for the next 12 months. There's clearly a desire by these organizations to not only deliver a positive ROI but to track and prove it.

When looking at individual tools in use, we received a low percentage of responses. Of those that did respond, most are using some type of Google tool (Analytics, Data Studio, etc).

Do you use a real-time marketing dashboard?

	Yes, have currently	No, but planning to add in next 12 months	No, no plans to add	Unsure
Leader	41%	23%	25%	11%
Average	33%	22%	34%	11%
Laggard	20%	25%	43%	11%

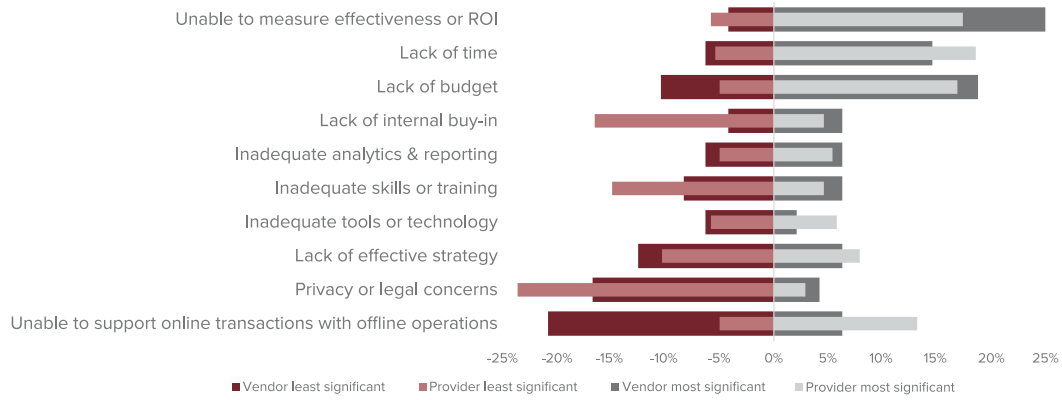■ Yes, have currently   ■ No, but planning to add in next 12 months   ■ No, no plans to add   ■ Unsure

Barriers to Success

Agency partners see the inability to measure ROI, lack of time, and lack of budget as the top barriers to success for healthcare organizations. While there is a great deal of alignment between the healthcare providers and their agencies in this area, there are some differences of opinion as well. Healthcare organizations have significant concerns about the challenges of supporting online transactions with offline operations, an issue felt particularly strongly by leaders who are likely pushing more aggressively to create interactive user experiences online. On the other hand, agency partners are far more concerned about the lack of internal buy-in and skill gaps that exist within their clients' organizations.

Vendor vs. Provider: Most/Least Significant Problems

Legend: Vendor least significant · Provider least significant · Vendor most significant · Provider most significant

Categories (top to bottom):
- Unable to measure effectiveness or ROI
- Lack of time
- Lack of budget
- Lack of internal buy-in
- Inadequate analytics & reporting
- Inadequate skills or training
- Inadequate tools or technology
- Lack of effective strategy
- Privacy or legal concerns
- Unable to support online transactions with offline operations

Axis: -25% -20% -15% -10% -5% 0% 5% 10% 15% 20% 25%

Barriers to Success by Leader/Laggard

There are two important areas where leaders deviate from the rest of the pack when it comes to what they see as barriers to digital marketing success. Leaders see the inability to support online transactions with offline operations as a much bigger concern than other organizations. This is likely due to the fact leaders are pushing into more sophisticated online capabilities as well as patient and consumer engagement which pushes these concerns to the top of the list. In addition, laggards and, to a lesser extent, leaders rank the lack of tools and technology as a bigger barrier to success. Laggards are likely missing key pieces of the core marketing IT ecosystem that they need to be successful, while leaders' attitudes could be due to the challenges of integration amongst their different systems or the need for additional tools to support more sophisticated online experiences. Inadequate skills and training are of moderate concern to respondents overall, but not to leaders who placed it at the bottom of their list of concerns. Laggards feel the lack of resources more severely than their average and leading counterparts.

	Most/Least Significant Problems			
	Leader	Average	Laggard	Overall
Lack of time	9	9	7	10
Lack of budget	8	8	10	9
Unable to measure effectiveness or ROI	7	10	9	8
Unable to support online transactions with offline operations	10	7	3	7
Inadequate analytics & reporting	1	6	6	6
Inadequate tools or technology	6	4	8	5
Lack of effective strategy	4	5	5	4
Inadequate analytics & reporting	5	3	2	3
Lack of internal buy-in	3	2	4	2
Privacy or legal concerns	2	1	1	1

Rank 10=Most problematic
Rank 1=Least problematic

2 0 1 8

H E A L T H C A R E
DIGITAL MARKETING TRENDS
S U R V E Y

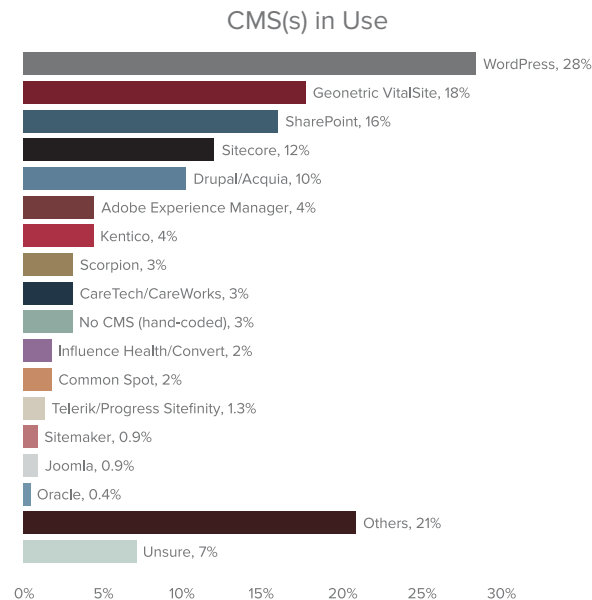# Website Design and
User Experience

Website Design & User Experience

You can't think about digital strategy without considering your website and other marketing technology, like CRM software. From planned redesigns and content management system (CMS) changes, to CRM and personalization adoption, keep reading to learn the latest in marketing technology trends, including:

- WordPress is cited as the most used CMS.
- Half of all respondents are either in the planning stages for a redesign or have a redesign in progress.
- Improving the overall user experience (UX) is far and away the primary motivator for organizations to redesign their website, but the continuing influence of mobile and changes to organizations' brands are also significant factors.
- While personalization of the web experience is gaining momentum, the average respondent is employing very few personalization methods today.

Content Management Systems

For the second year in a row, WordPress is cited as the most used CMS. Three open source platforms are among the top five, with two proprietary systems coming in second and fourth. There is a mix of both industry-agnostic systems as well as healthcare-specific platforms, such as VitalSite®, in use while 3% of respondents indicated they still hand code their sites.

CMS(s) in Use

CMS	Percentage
WordPress	28%
Geonetric VitalSite	18%
SharePoint	16%
Sitecore	12%
Drupal/Acquia	10%
Adobe Experience Manager	4%
Kentico	4%
Scorpion	3%
CareTech/CareWorks	3%
No CMS (hand-coded)	3%
Influence Health/Convert	2%
Common Spot	2%
Telerik/Progress Sitefinity	1.3%
Sitemaker	0.9%
Joomla	0.9%
Oracle	0.4%
Others	21%
Unsure	7%

Planned Redesign and Platform Changes

Overall where the redesign cycle has slowed in recent years, we see a wave of redesign planning underway now. Half of all respondents are either in the planning stages for a redesign or have a redesign in progress. Of the 20% of respondents that have a CMS change in planning stages or in progress, most of those platform changes are happening at the same time as a redesign.

Plan to Change CMS

- Unsure, 13%
- No, CMS change recently completed (within 12 months), 10%
- Yes, CMS change in progress, 8%
- Yes, CMS change in planning stages, 12%
- No, no plans to change CMS in near future, 58%

Plan to Redesign

- Unsure, 7%
- No, redesign recently completed (within 12 months), 18%
- Yes, redesign in progress, 20%
- No, no plans to redesign in near future, 26%
- Yes, redesign is in planning stages, 30%
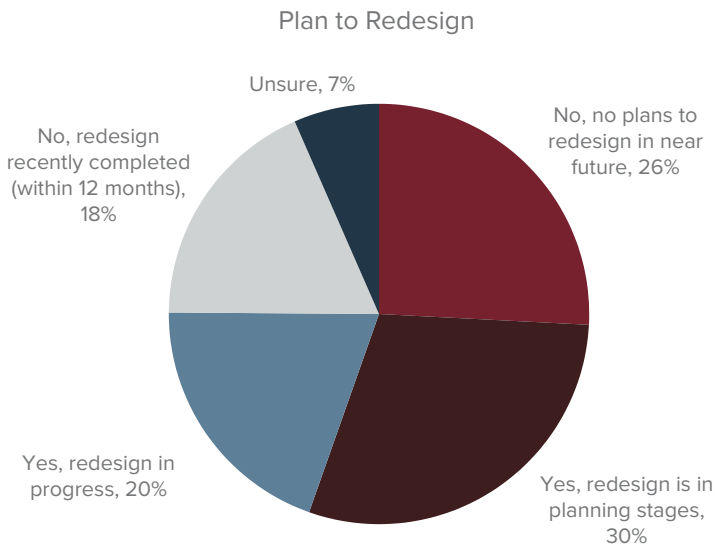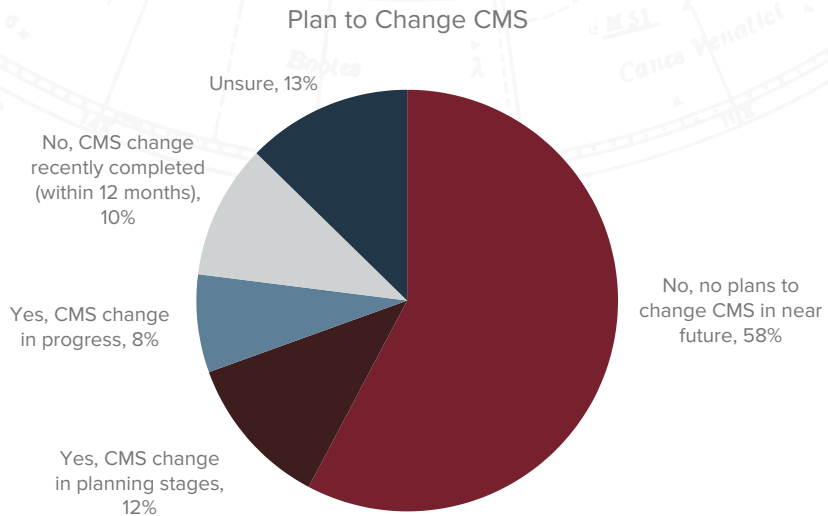
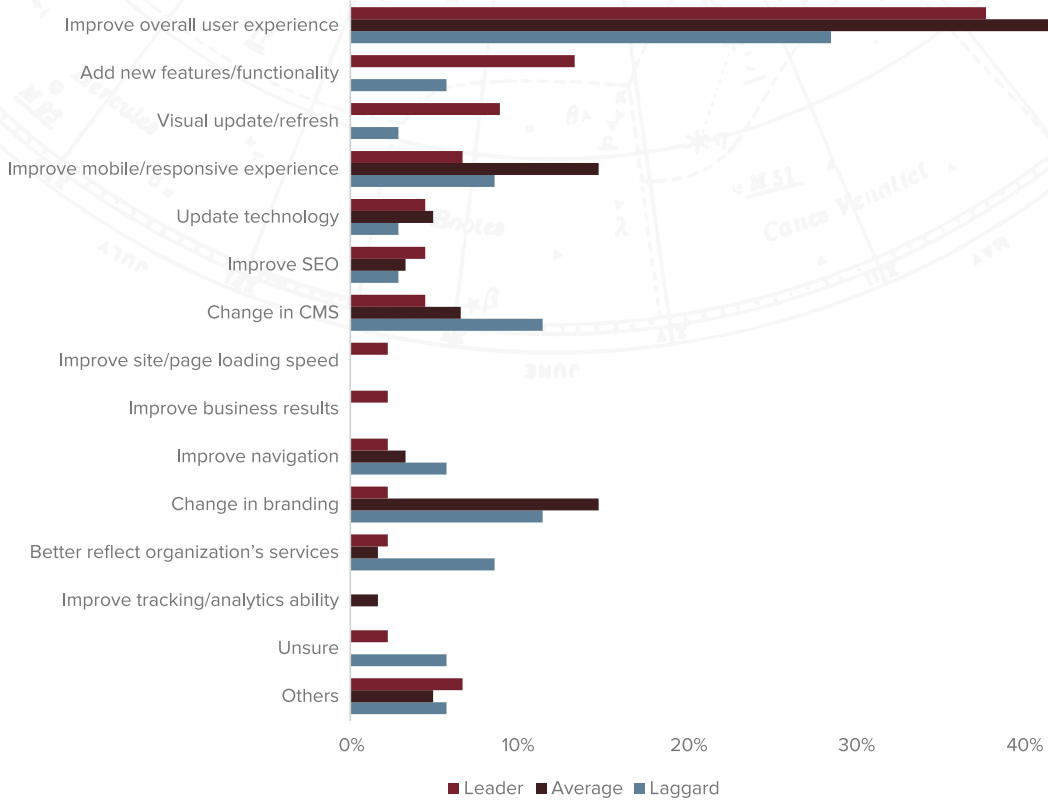|	No, no plans to redesign in near future	No, redesign recently completed (within 12 months)	Yes, redesign is in planning stages	Yes, redesign in progress
No, no plans to change CMS in near future	96%	63%	46%	55%
No, CMS change recently completed (within 12 months)	2%	34%	8%	11%
Yes, CMS change is in planning stages	0%	3%	37%	8%
Yes, CMS change in progress	2%	0%	10%	26%

Motivations for Redesign

When evaluating what triggers most organizations to redesign their websites, improving the UX is far and away the primary motivator. When looking at those same motivations by leader, average, and laggard segments, improving overall UX is still the top driver, but secondary motivators change based on segment. Leaders are looking to add new functionality, while average organizations are looking to improve the mobile UX/responsive design, and for laggards it appears to be a toss up between a change in CMS and a change in branding.

Primary Motivation for Redesign

Motivation	Percentage
Improve overall user experience	38%
Improve mobile/responsive experience	11%
Change in branding	10%
Change in CMS	7%
Add new features/functionality	6%
Update technology	4%
Visual update/refresh	4%
Improve SEO	4%
Improve navigation	4%
Better reflect organization's services	4%
Improve tracking/analytics ability	1%
Improve site/page loading speed	1%
Improve business results	1%
Others	6%
Unsure	2%

Primary Motivation for Redesign by Leader/Laggard

Categories (top to bottom):
- Improve overall user experience
- Add new features/functionality
- Visual update/refresh
- Improve mobile/responsive experience
- Update technology
- Improve SEO
- Change in CMS
- Improve site/page loading speed
- Improve business results
- Improve navigation
- Change in branding
- Better reflect organization's services
- Improve tracking/analytics ability
- Unsure
- Others

Legend: ■ Leader ■ Average ■ Laggard

X-axis: 0% 10% 20% 30% 40%

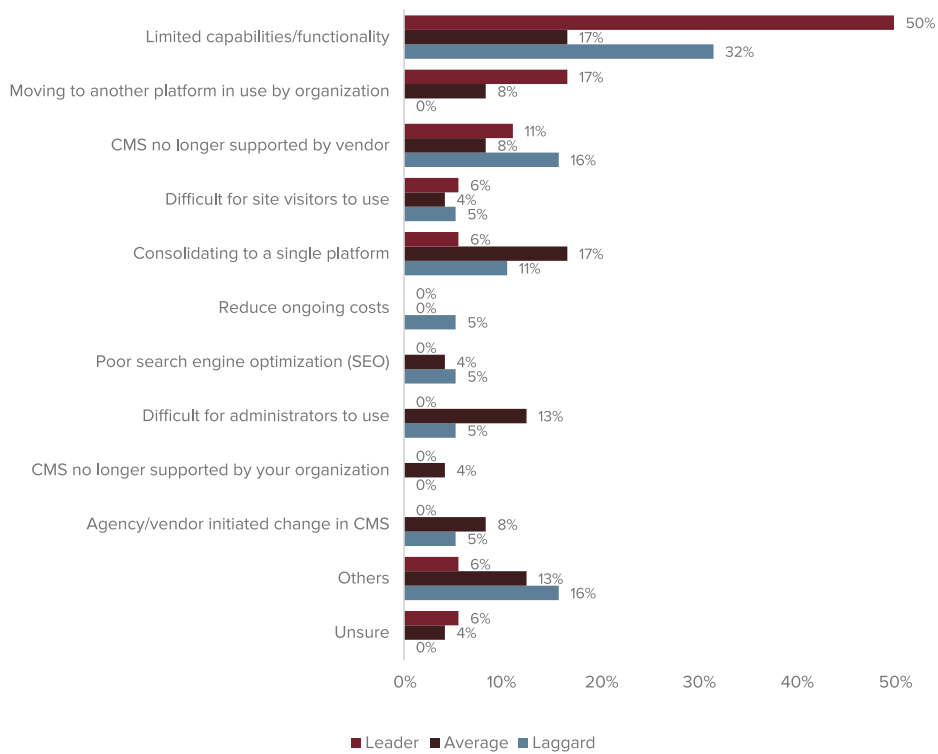## Motivations for CMS Changes

Overall, the need to improve functionality is the overwhelming reason most organizations look to change their CMS platforms. This is particularly true for leaders and laggards, while consolidating to a single platform is a top motivator for average organizations.

Primary Motivation for Changing CMS

Motivation	Percentage
Limited capabilities/functionality	31%
Consolidating to a single platform	11%
CMS no longer supported by vendor	11%
Moving to another platform in use by organization	8%
Difficult for administrators to use	7%
Difficult for site visitors to use	5%
Agency/vendor initiated change in CMS	5%
Poor search engine optimization (SEO)	3%
Reduce ongoing costs	2%
CMS no longer supported by your organization	2%
Others	11%
Unsure	3%

Primary Motivation for Changing CMS by Leader/Laggard

| Motivation	Leader	Average	Laggard
Limited capabilities/functionality	50%	17%	32%
Moving to another platform in use by organization	17%	8%	0%
CMS no longer supported by vendor	11%	8%	16%
Difficult for site visitors to use	6%	4%	5%
Consolidating to a single platform	6%	17%	11%
Reduce ongoing costs	0%	0%	5%
Poor search engine optimization (SEO)	0%	4%	5%
Difficult for administrators to use	0%	13%	5%
CMS no longer supported by your organization	0%	4%	0%
Agency/vendor initiated change in CMS	0%	8%	5%
Others	6%	13%	16%
Unsure	6%	4%	0%

■ Leader   ■ Average   ■ Laggard

Trends in Personalization

Of the respondents indicating that they use personalization, nearly half appear to be using only a single personalization method, but 77% of those were simply noting that they don't know what personalization methods are in use.

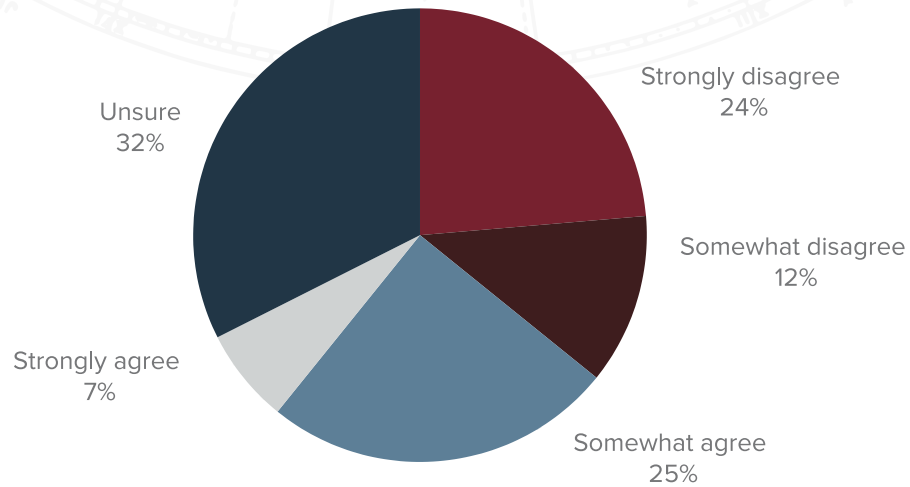### Number of Personalization Methods Used
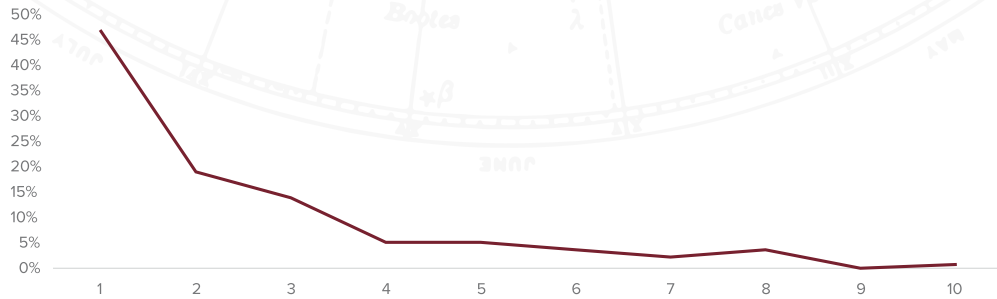
Methods of Personalization
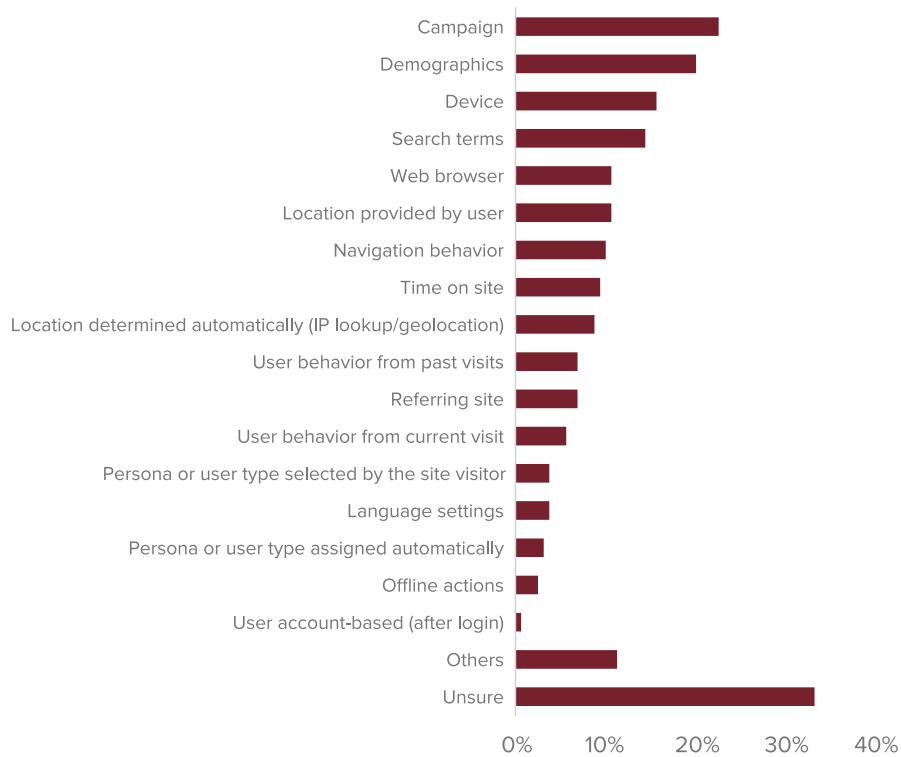
Personalization and Digital Marketing Performance

When looking at whether or not organizations feel like they can demonstrate that web personalization is improving digital marketing performance, the feedback is quite varied. 36% disagree to some capacity, 32% agree to some capacity, and 32% are unsure.

Our organization can demonstrate that website personalization has improved the performance of our digital marketing.
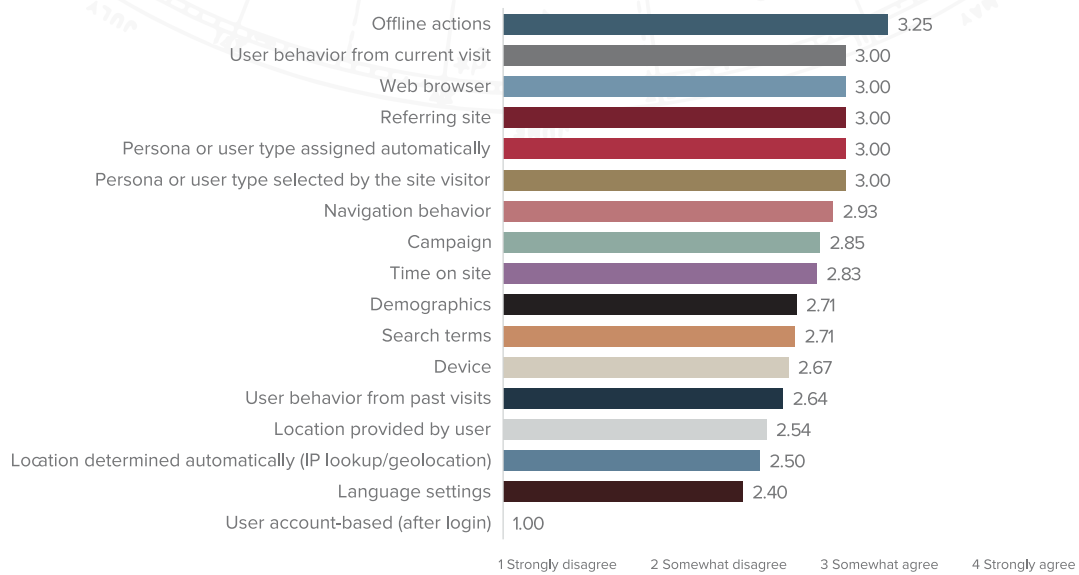

Unsure
32%

Strongly disagree
24%

Somewhat disagree
12%

Strongly agree
7%

Somewhat agree
25%

■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree ■ Unsure

Satisfaction with Personalization

There are very few personalization methods used by the average respondent. Some approaches are seeing success including using user behavior, web browser, referring site, and personas. Other approaches are proving harder to execute or demonstrate success, including past user behavior, location-based personalization, demographics, and search terms.
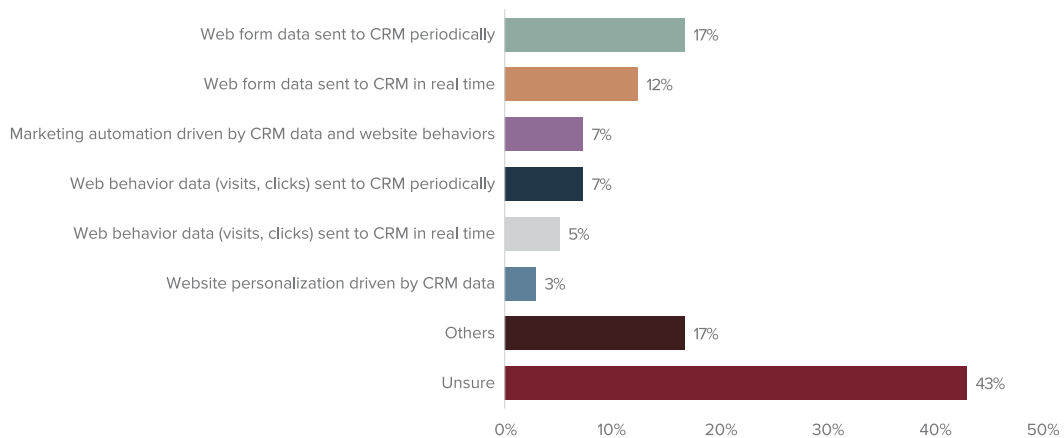
Able to Demonstrate Personalization Value by Personalization Method

Personalization Method	Value
Offline actions	3.25
User behavior from current visit	3.00
Web browser	3.00
Referring site	3.00
Persona or user type assigned automatically	3.00
Persona or user type selected by the site visitor	3.00
Navigation behavior	2.93
Campaign	2.85
Time on site	2.83
Demographics	2.71
Search terms	2.71
Device	2.67
User behavior from past visits	2.64
Location provided by user	2.54
Location determined automatically (IP lookup/geolocation)	2.50
Language settings	2.40
User account-based (after login)	1.00

1 Strongly disagree   2 Somewhat disagree   3 Somewhat agree   4 Strongly agree

CRM Integration

CRM adoption has increased steadily over the years, but there is still room for improvement in terms of integrating the web and CRM systems. Only 12% of organizations are sending web form data to CRM in real-time, and only another 7% are using web behavior and CRM data to drive marketing automation efforts. Overall, 43% of respondents are unsure of their integration approach.

Website Integration Approach with CRM

Approach	Percentage
Web form data sent to CRM periodically	17%
Web form data sent to CRM in real time	12%
Marketing automation driven by CRM data and website behaviors	7%
Web behavior data (visits, clicks) sent to CRM periodically	7%
Web behavior data (visits, clicks) sent to CRM in real time	5%
Website personalization driven by CRM data	3%
Others	17%
Unsure	43%

2018

HEALTHCARE
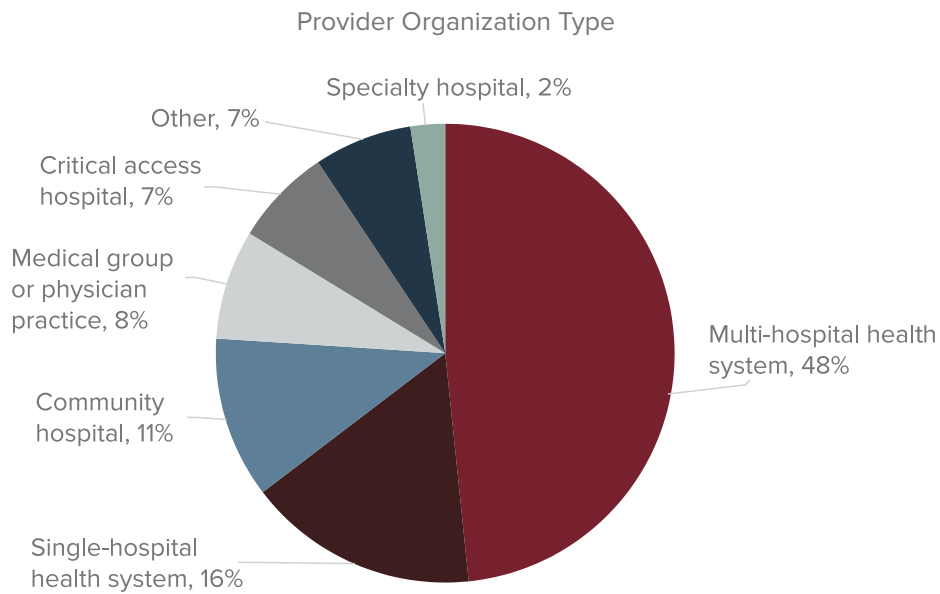DIGITAL MARKETING TRENDS
SURVEY

Methodology

Methodology & Demographics

Data collection was handled through an online survey. Respondents were solicited through a wide range of channels including email, social media, and phone. Geonetric partnered with *__eHealthcare Strategy & Trends__* for additional promotion efforts.
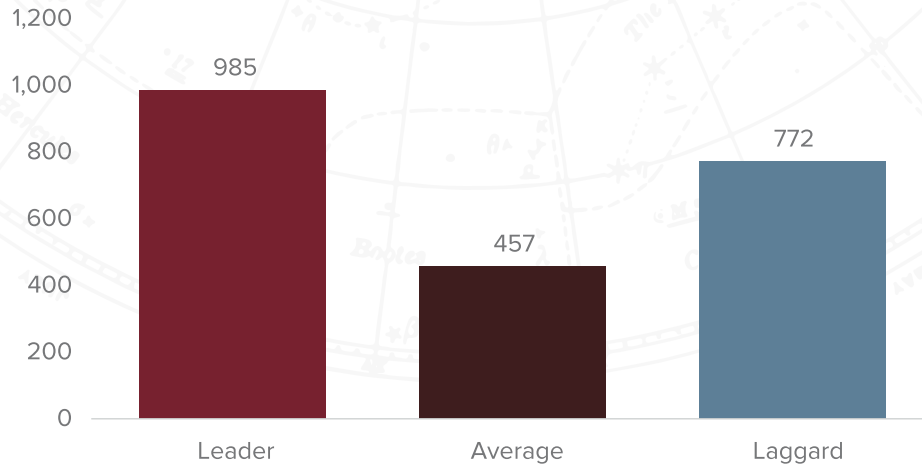
All survey questions were optional and some respondents chose not to answer individual questions. Peer groups for segmentation were largely self-reported. Some questions required coding prior to analysis, which was performed by research firm **Vernon Research Group**.

Data is provided as-is and represents only the input and opinions of those organizations who responded. It is offered without any promises to its representation of the broader industry or statistical significance.
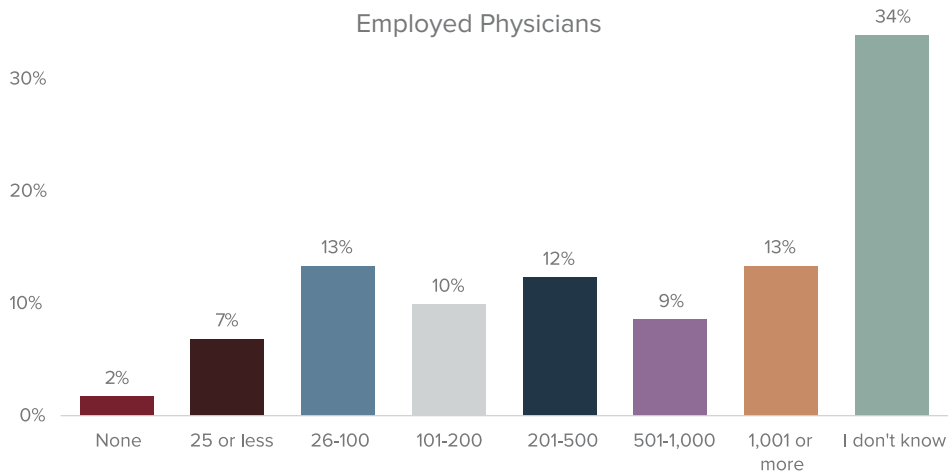
A total of 249 healthcare provider organizations responded and 47 vendors/agencies.
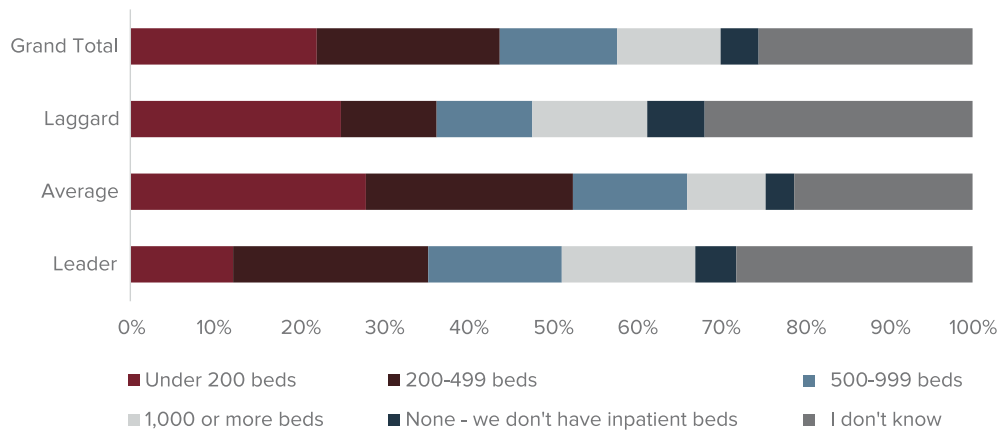
Provider Organization Type

Specialty hospital, 2%

Other, 7%

Critical access hospital, 7%

Medical group or physician practice, 8%

Community hospital, 11%

Single-hospital health system, 16%

Multi-hospital health system, 48%

Average Number of Employed Physicians

	Leader	Average	Laggard
Value	985	457	772

Employed Physicians

Category	Percentage
None	2%
25 or less	7%
26-100	13%
101-200	10%
201-500	12%
501-1,000	9%
1,001 or more	13%
I don't know	34%

Bed Counts

(Stacked bar chart for: Grand Total, Laggard, Average, Leader)

Legend:
- Under 200 beds
- 200-499 beds
- 500-999 beds
- 1,000 or more beds
- None - we don't have inpatient beds
- I don't know

About Geonetric

Geonetric helps healthcare brands thrive through effective marketing and distinguished websites. As a marketing agency and software developer with deep technical and creative expertise, Geonetric provides hospitals, health systems, and medical groups with a healthcare-specific content management system, hosting, marketing strategies, and creative services optimized for the unique needs of the healthcare industry.

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