



Industry Insights from Geonetric's 2019 Healthcare Digital Marketing Trends Survey

GEONETRIC®

The Survey



What makes this survey unique?

- In partnership with *eHealthcare Strategy & Trends*
- Largest survey of digital marketing in healthcare
- Look at how leading organizations act differently
- Compare vendor insights to provider responses



Advisory Board



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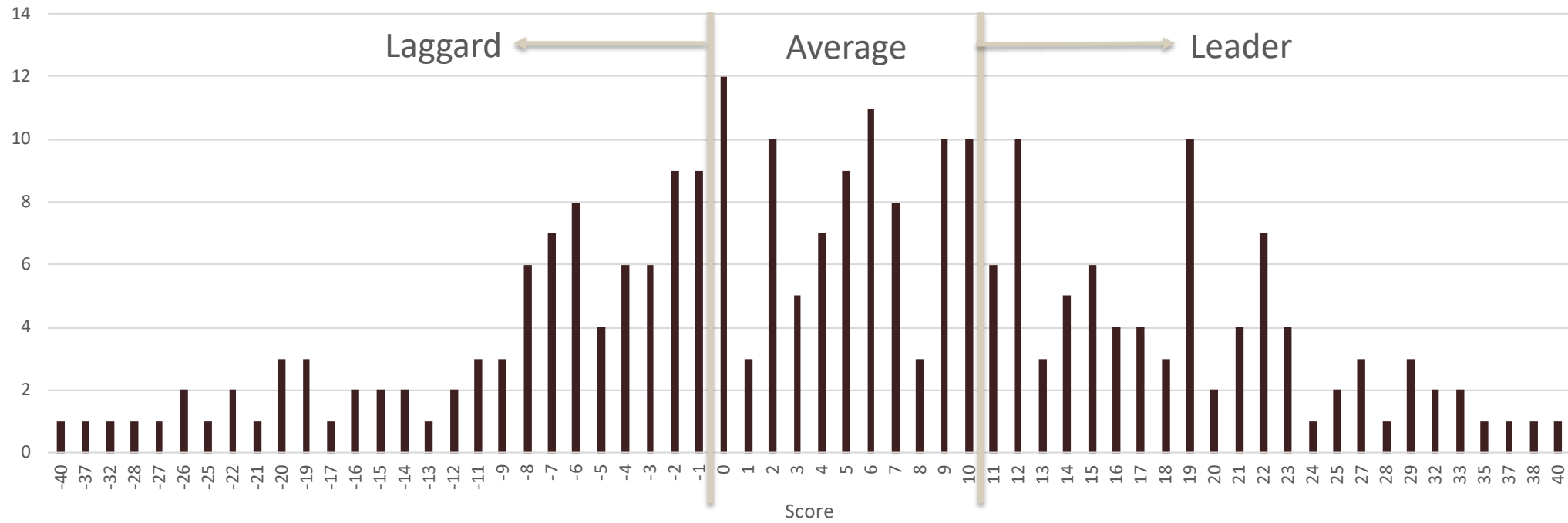


Tony Huth

President & Co-Founder
Medicom Health



Leader/Laggard Score Distribution



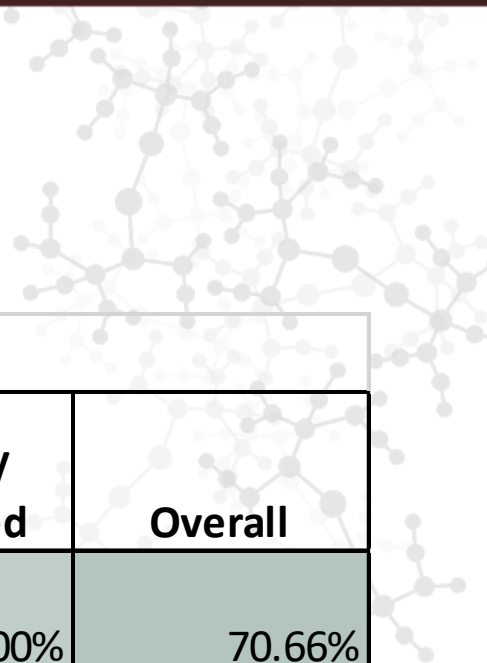
		Performance by Function Scored			
		Laggard	Average	Leader	Overall
	Social media	-0.23	0.68	1.37	0.63
	General website management	-0.40	0.57	1.25	0.50
	Digital advertising	-0.32	0.39	1.24	0.46
	Design	-0.42	0.52	1.20	0.46
	Accessibility	-0.23	0.42	1.11	0.45
➔	Content development	-0.46	0.45	1.24	0.43
	SEO	-0.42	0.45	1.15	0.42
➔	Digital strategy	-0.54	0.29	1.32	0.38
	Video production	-0.25	0.36	0.98	0.38
➔	Development	-0.56	0.37	1.18	0.36
➔	Content marketing	-0.60	0.42	1.14	0.34
	Local search or business listing management	-0.42	0.31	0.98	0.31
	Hosting	-0.27	0.20	0.82	0.26
	UX	-0.65	0.34	1.02	0.26
	Project management	-0.20	0.10	0.82	0.25
	Analytics	-0.42	0.16	0.84	0.21
	Online reputation management (incl. ratings/reviews)	-0.52	0.06	0.86	0.15
	CRM	-0.82	-0.40	0.54	-0.21
	Email or marketing automation	-0.95	-0.31	0.47	-0.24
	Mobile app development	-1.15	-0.46	0.34	-0.41



Redesigns

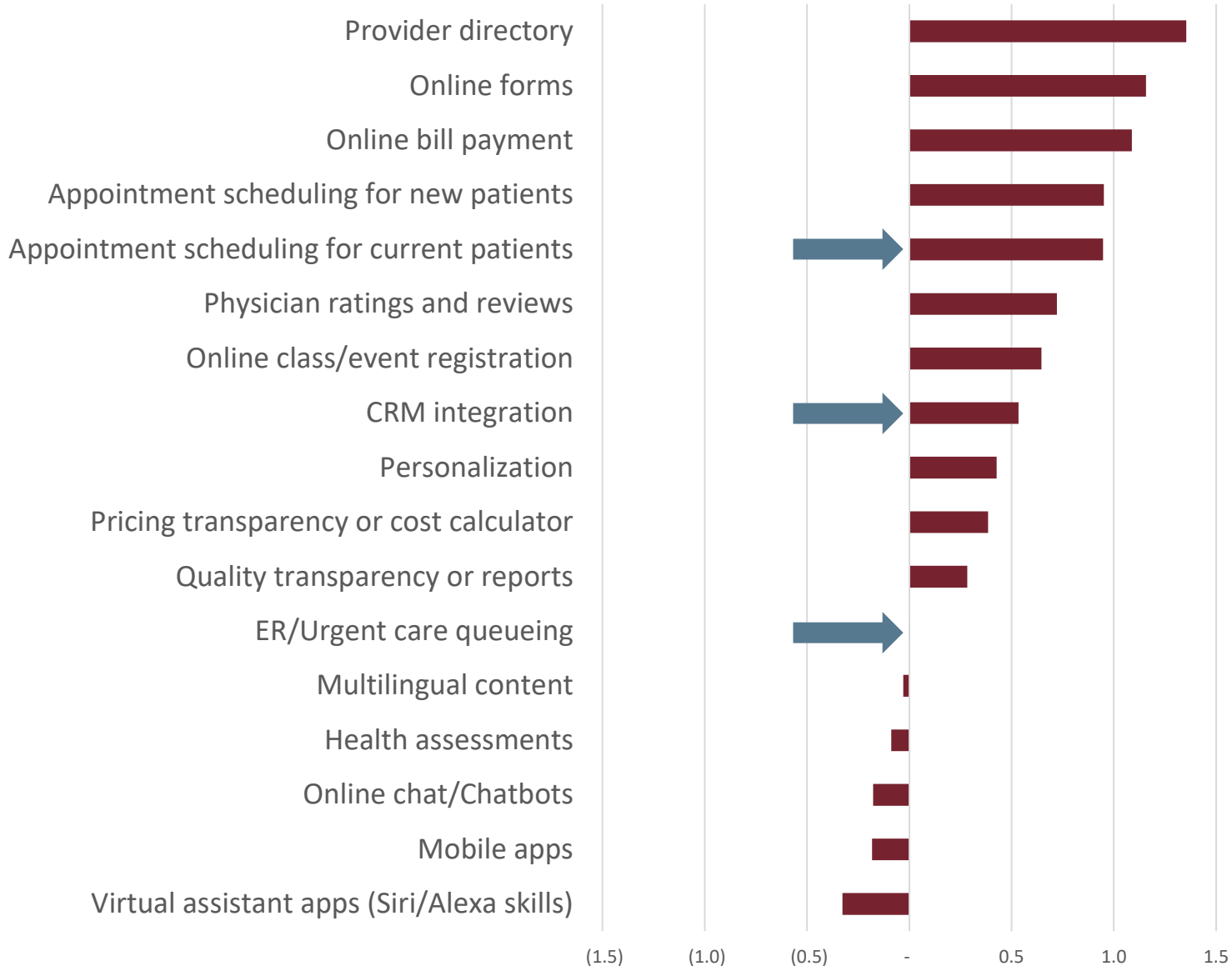


Plans to redesign main site?				
	Laggard	Average	Leader	Overall
No plans to redesign	31.15%	26.47%	37.93%	31.55%
Planning	31.15%	29.41%	20.69%	27.27%
In progress	16.39%	20.59%	12.07%	16.58%
Recently completed	21.31%	23.53%	29.31%	24.60%



		Plan to redesign main site?				
		No plans to redesign	Planning	In progress	Recently completed	Overall
Plan to change CMS for main site?	No plans to change	91.07%	60.87%	60.00%	60.00%	70.66%
	In progress	0.00%	4.35%	36.00%	0.00%	6.59%
	Planning	3.57%	30.43%	4.00%	7.50%	11.98%
	Recently completed	5.36%	4.35%	0.00%	32.50%	10.78%

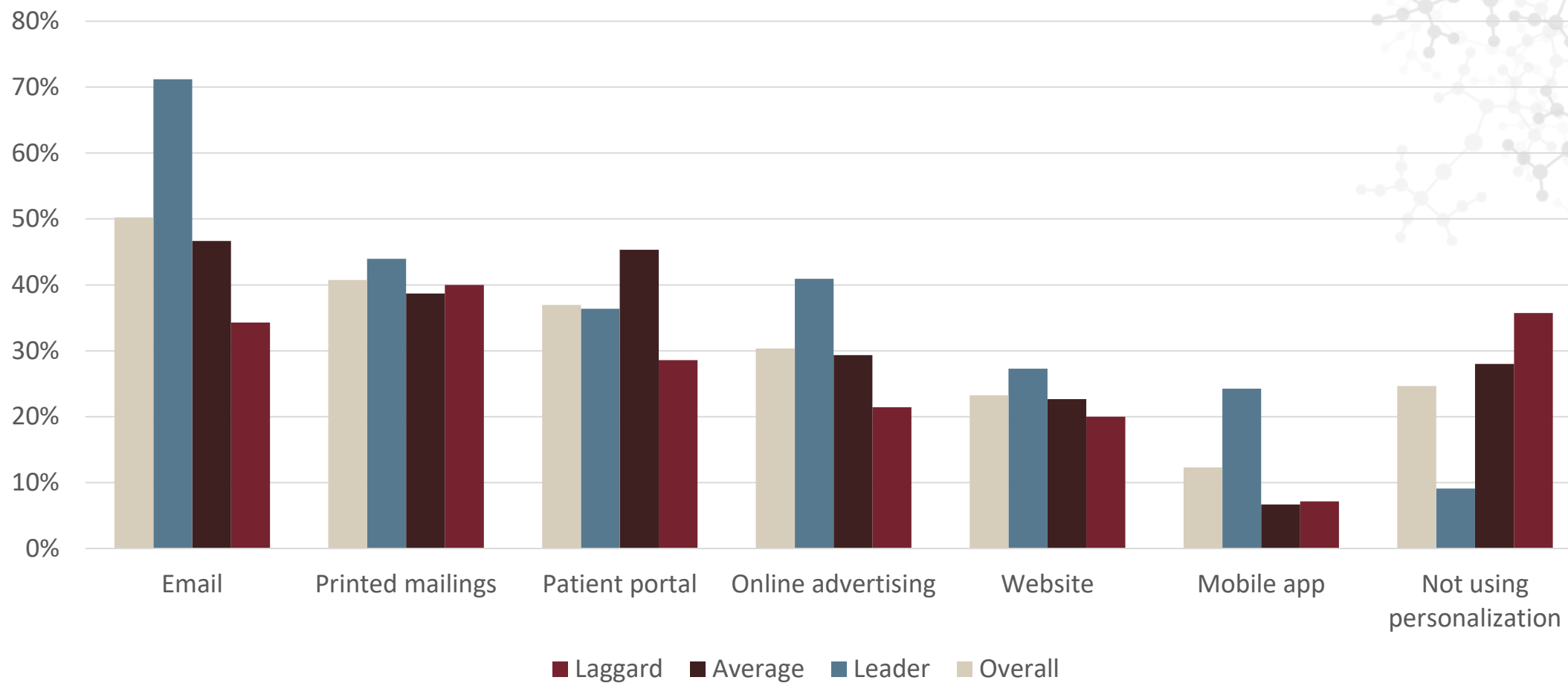
Importance of Website Features (Overall)



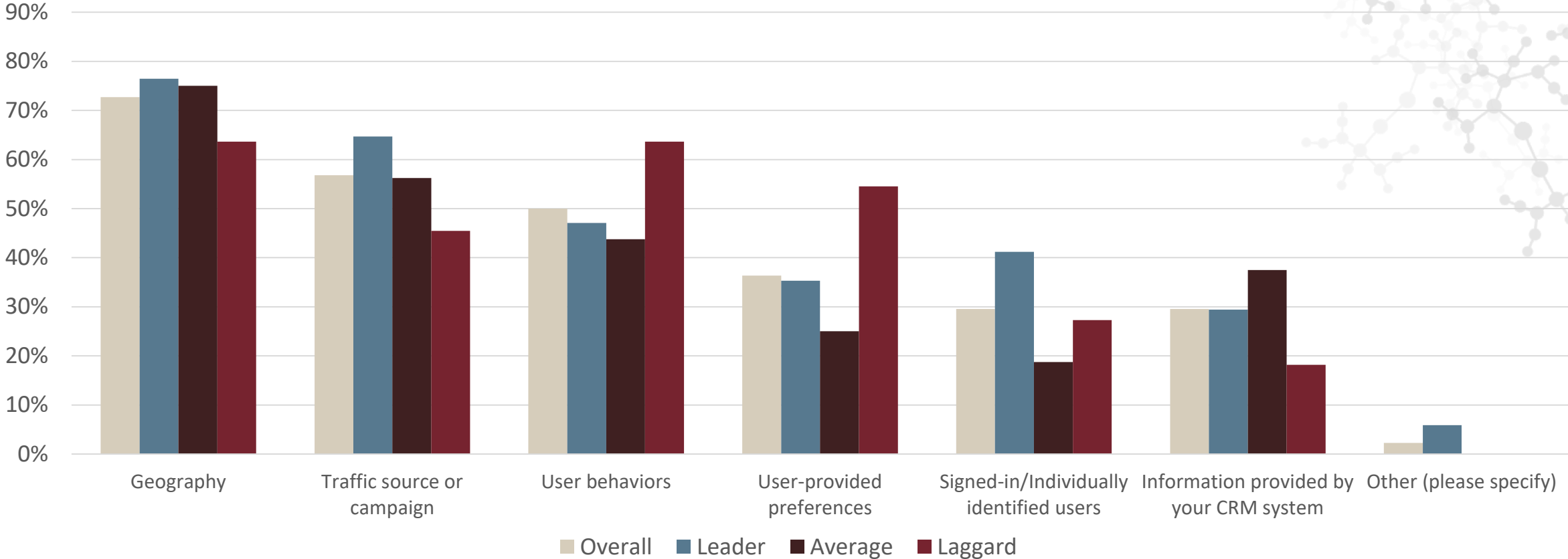
Personalization



Where Personalization is Used by Leader/Laggard



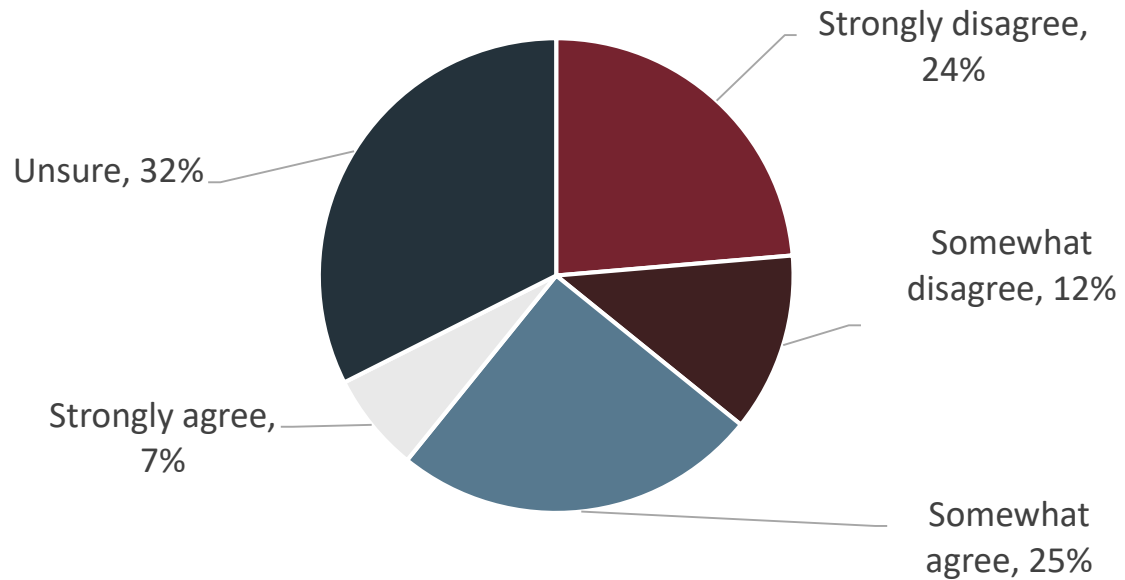
Methods of Personalization by Leader/Laggard



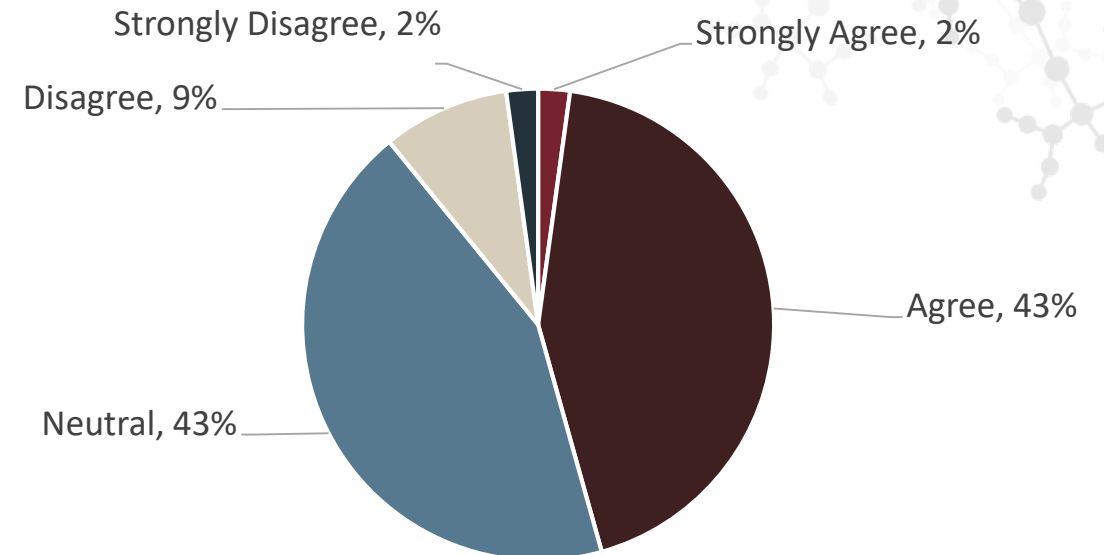
Note: This question had a small number of respondents (N=14)

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

2018



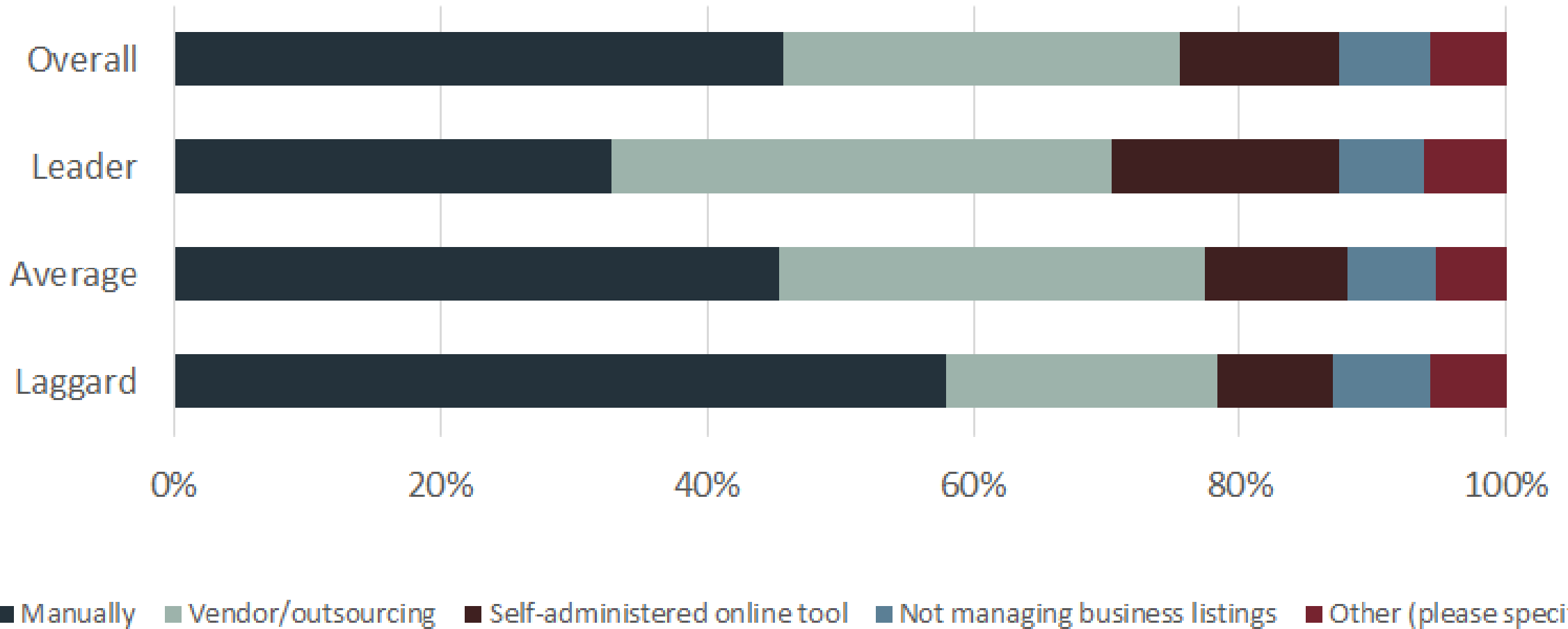
2019



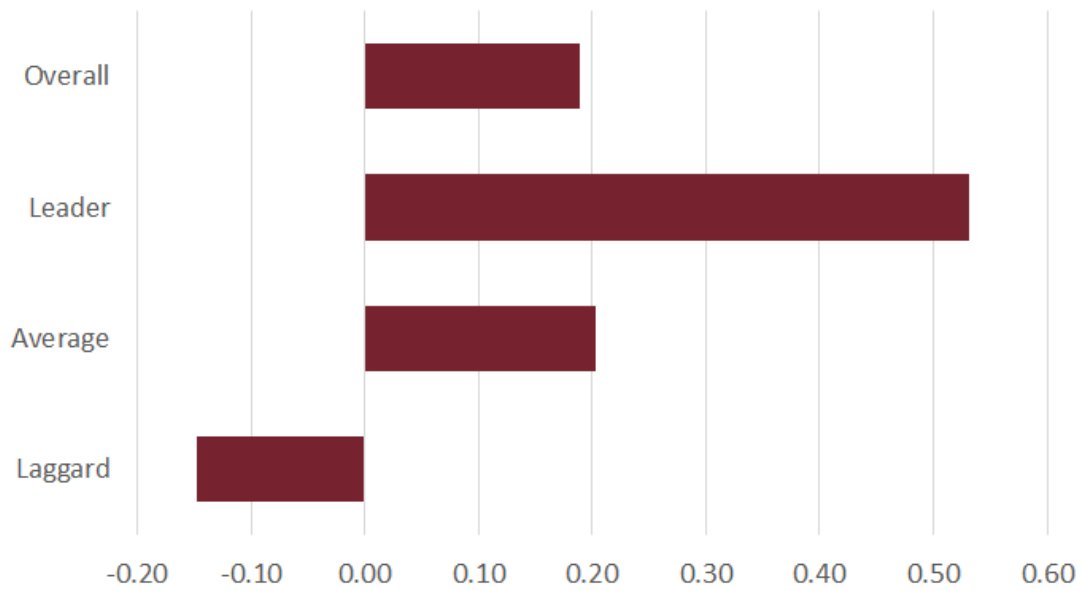
Business Listings



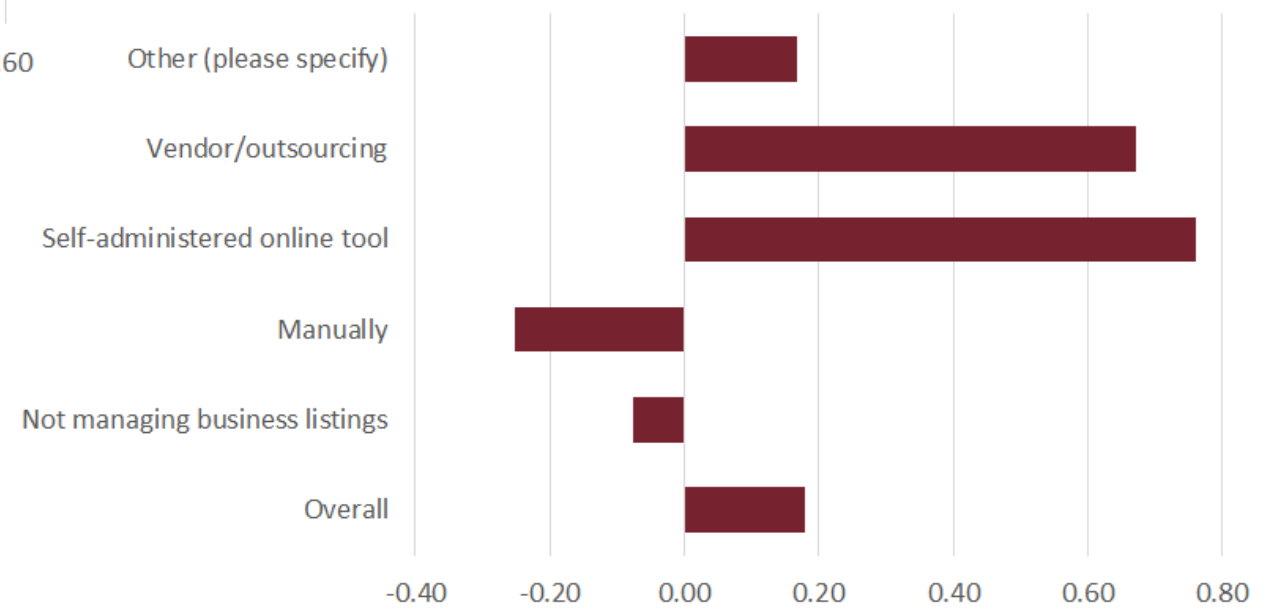
How Do You Manage Online Business Listings?



Business Listing Management Satisfaction

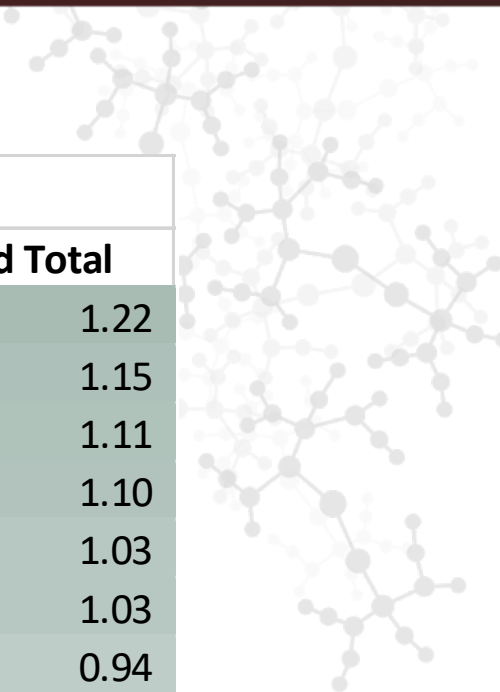


Business Listing Management Satisfaction by Approach



Goals

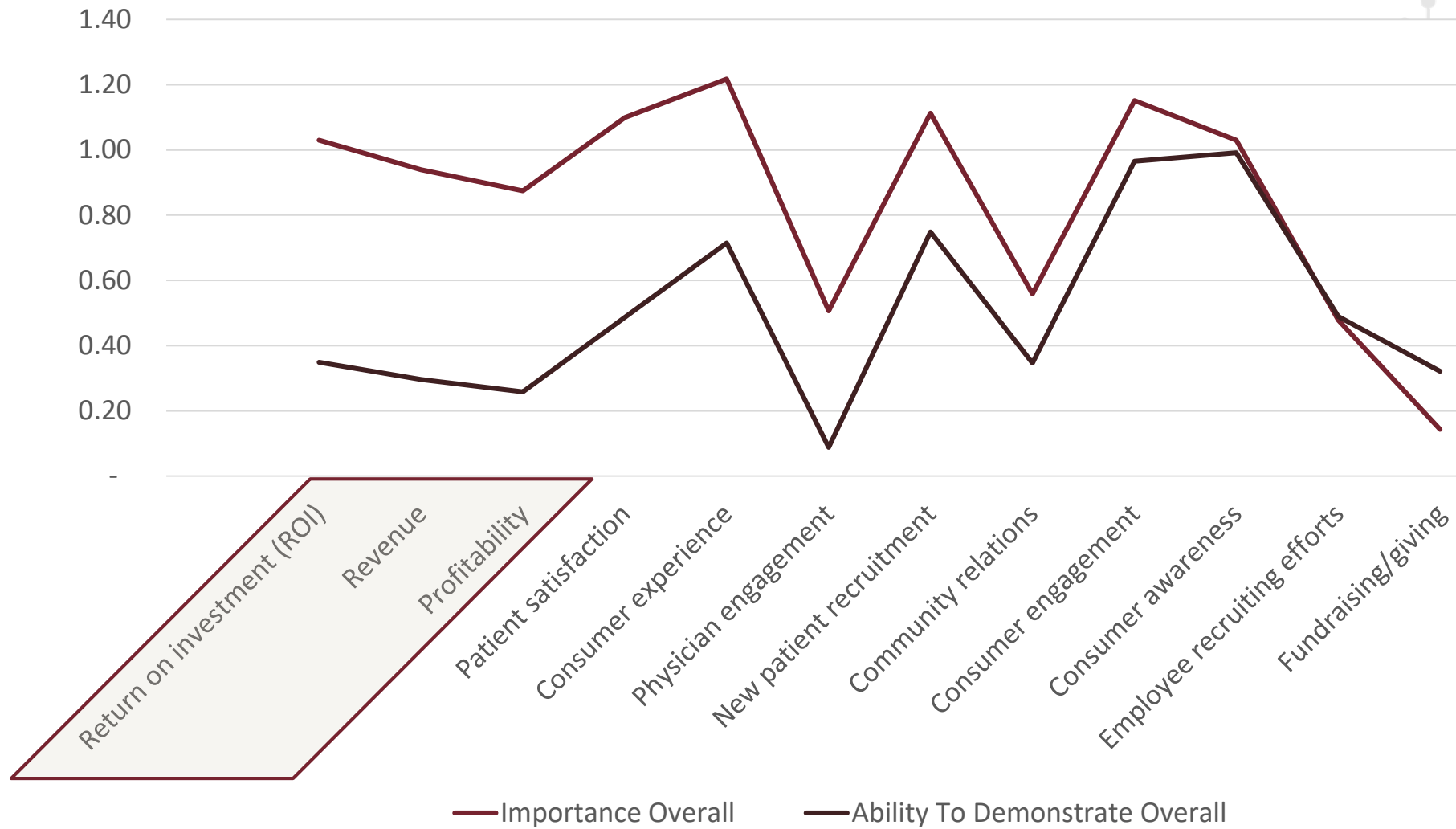




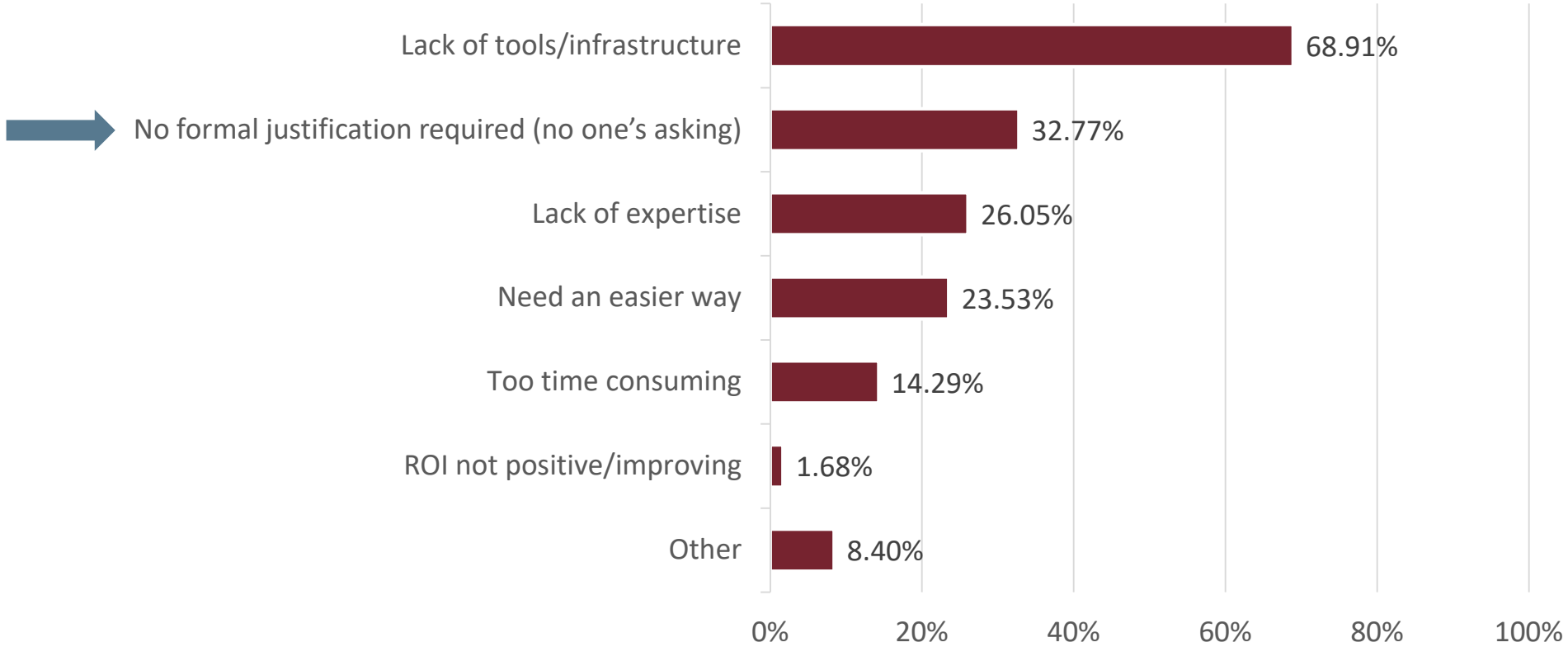
	Importance to Digital Marketing Success			
	Laggard	Average	Leader	Grand Total
Consumer experience	1.12	1.19	1.35	1.22
Consumer engagement	1.06	1.13	1.27	1.15
New patient recruitment	1.11	1.01	1.23	1.11
Patient satisfaction	1.14	0.99	1.17	1.10
Consumer awareness	0.97	1.06	1.05	1.03
Return on investment (ROI)	0.94	1.04	1.12	1.03
Revenue	0.97	0.89	0.96	0.94
Profitability	0.87	0.81	0.95	0.87
Community relations	0.67	0.50	0.51	0.56
Physician engagement	0.48	0.39	0.65	0.51
Employee recruiting efforts	0.31	0.58	0.55	0.48
Fundraising/giving	0.09	0.24	0.09	0.14
(Average of scored responses: Not at all important = -2, Slightly important = -1, Neutral = 0, Very important = 1, Extremely important = 2)				



Gap Analysis - Importance Vs. Ability To Demonstrate



Reasons for Lack of ROI Reporting

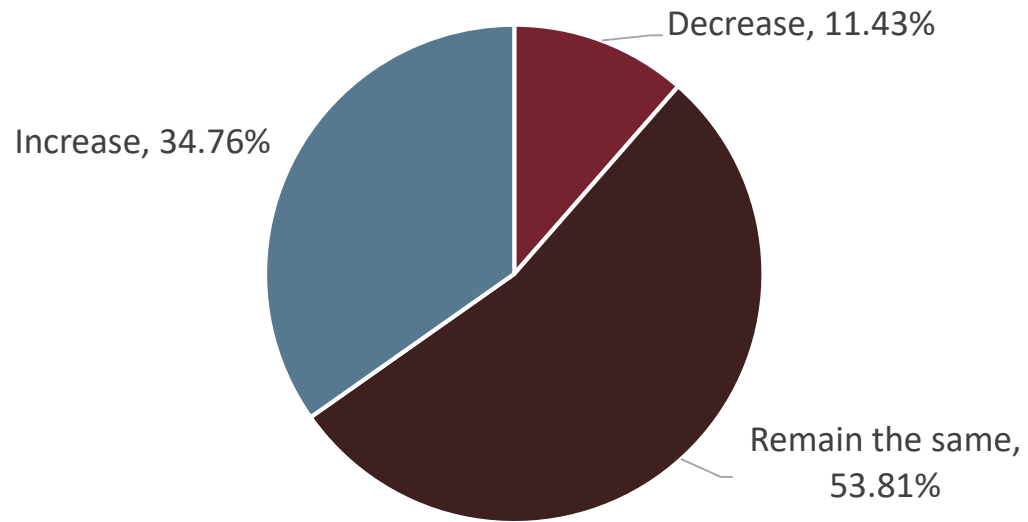


Budgets



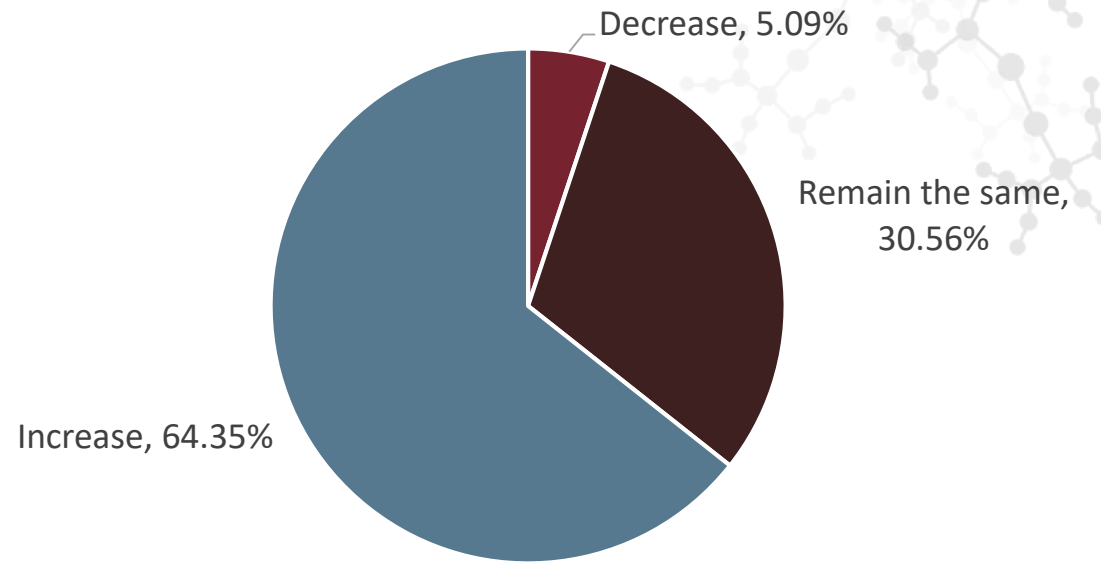


Expected Change in Overall Marketing Budget



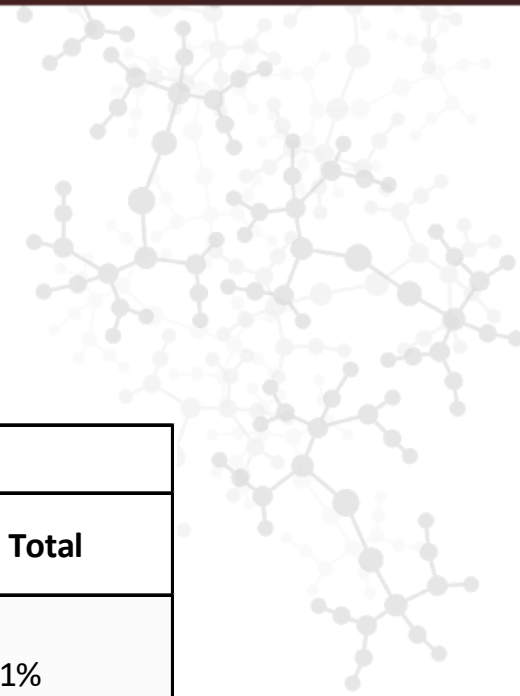
■ Decrease ■ Remain the same ■ Increase

Expected Change in Digital Marketing Budget



■ Decrease ■ Remain the same ■ Increase

Changes in digital marketing budgets



		Expected Change in Overall Marketing Budget			
		Decrease	Remain the same	Increase	Grand Total
Expected Change in Digital Marketing Budget	Decrease	45.83%	0.00%	0.00%	5.31%
	Remain the same	41.67%	42.73%	10.96%	31.40%
	Increase	12.50%	57.27%	89.04%	63.29%

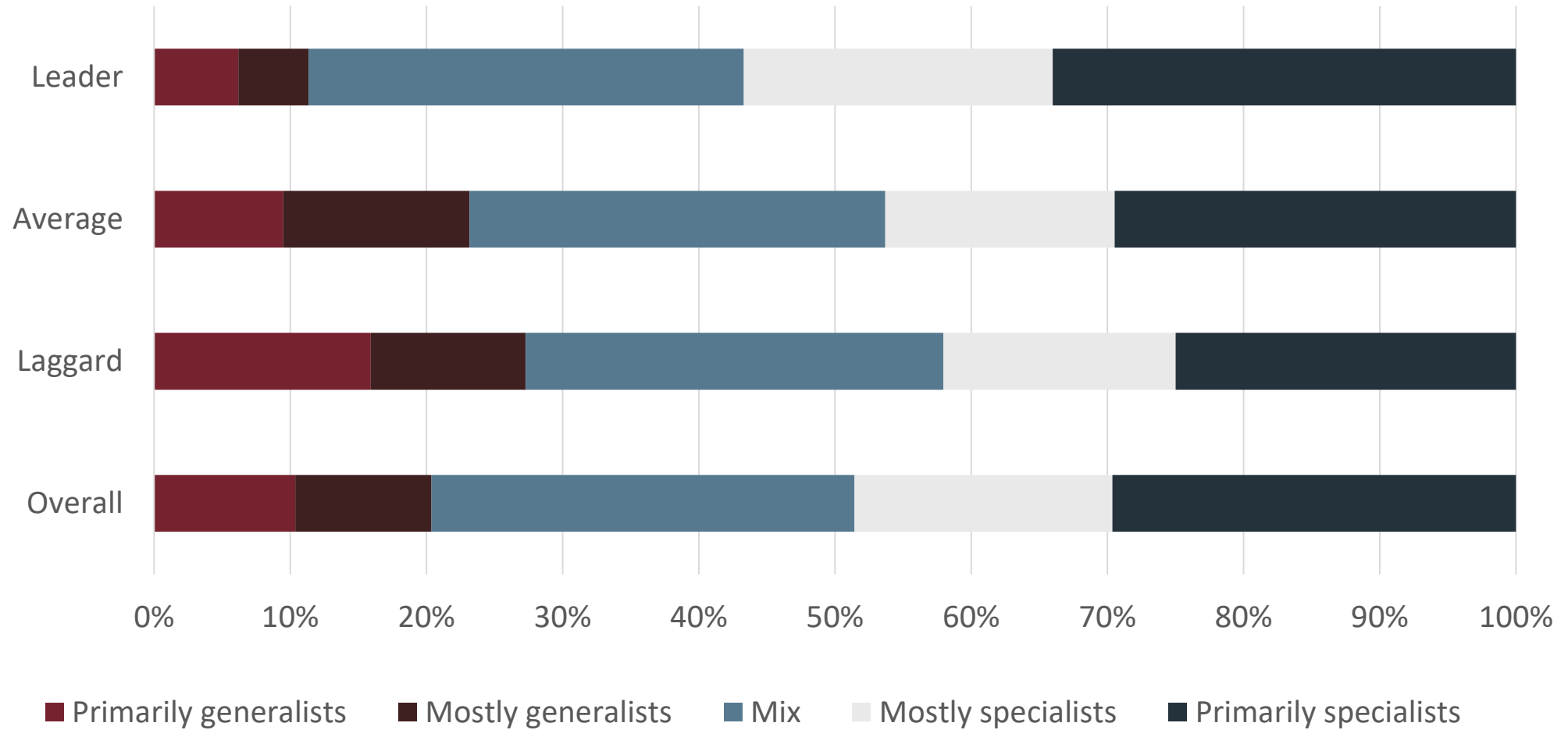
Percent of Marketing Budget Dedicated To Digital

		Laggard	Average	Leader	Overall
% of Marketing Budget Dedicated to Digital	Less than 20%	42.59%	26.15%	17.54%	28.41%
	20-40%	29.63%	44.62%	52.63%	42.61%
	40-60%	16.67%	20.00%	19.30%	18.75%
	60-80%	5.56%	7.69%	10.53%	7.95%
	More than 80%	5.56%	1.54%	0.00%	2.27%

Team Size and Organizational Structure

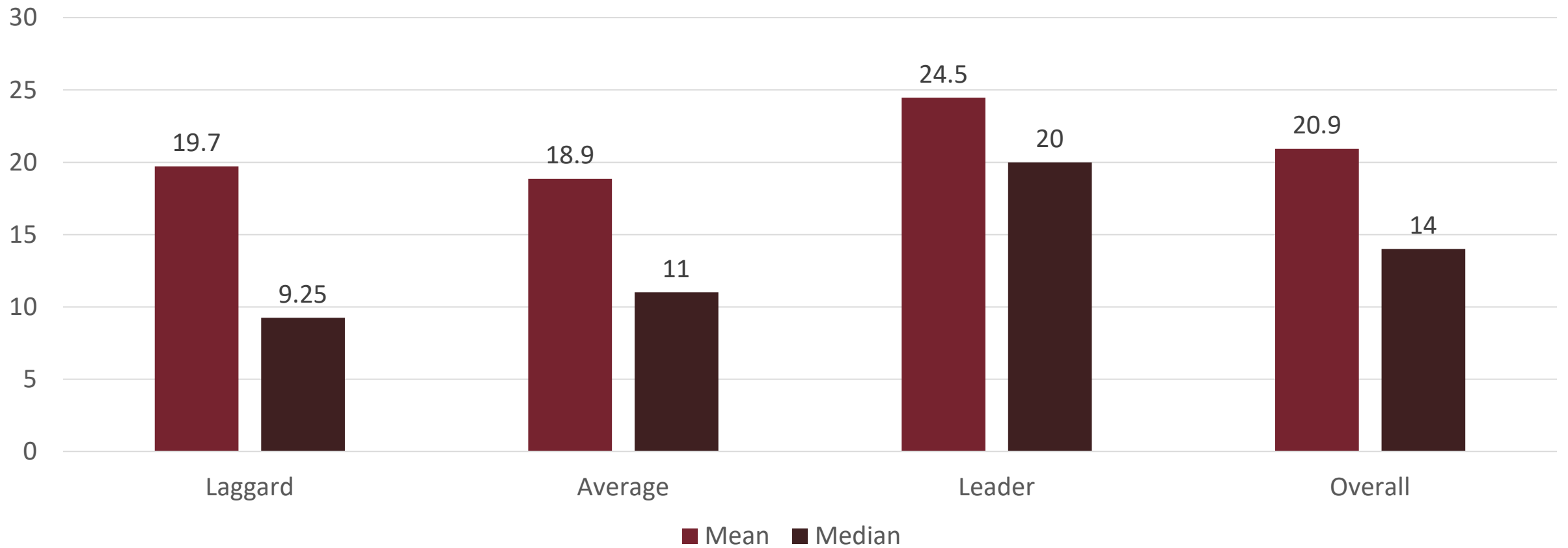


Staffing Type by Leader/Laggard

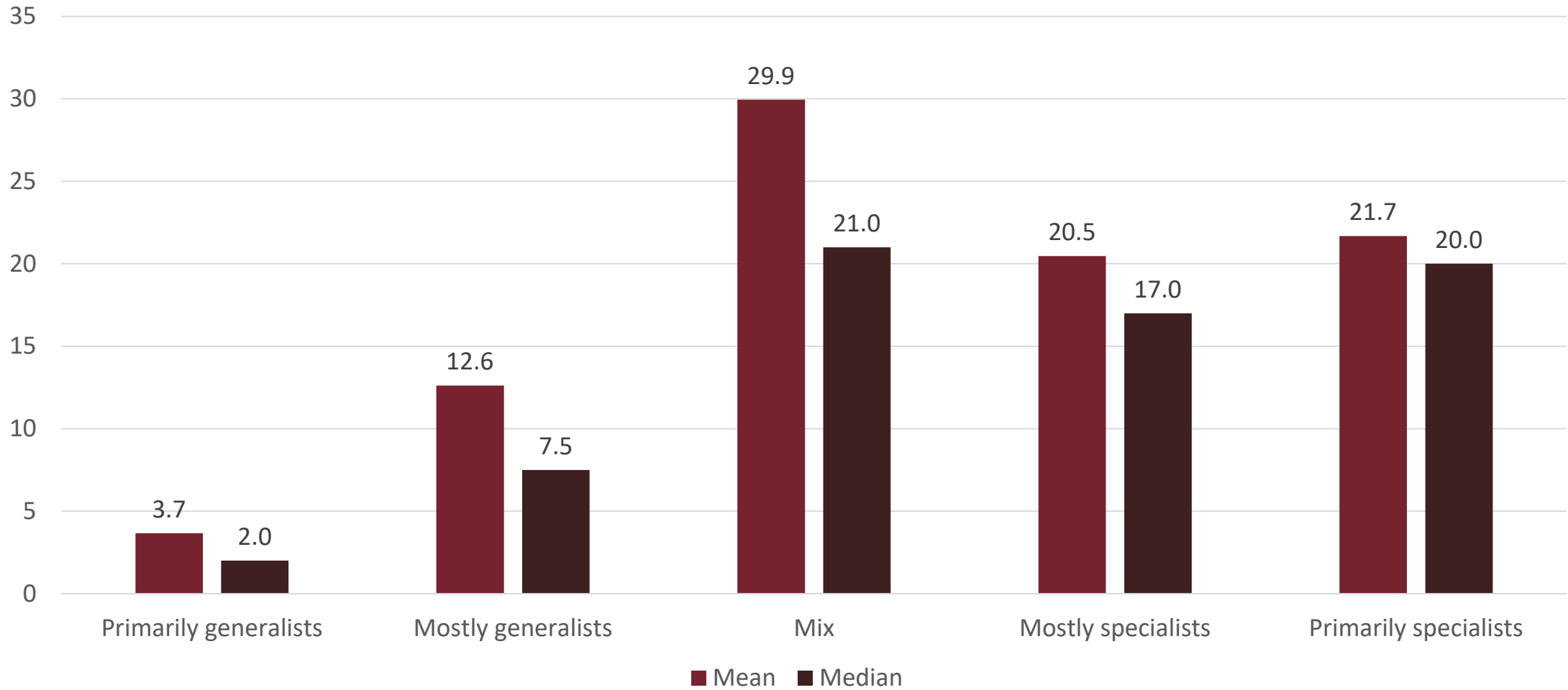




Team Size by Leader/Laggard



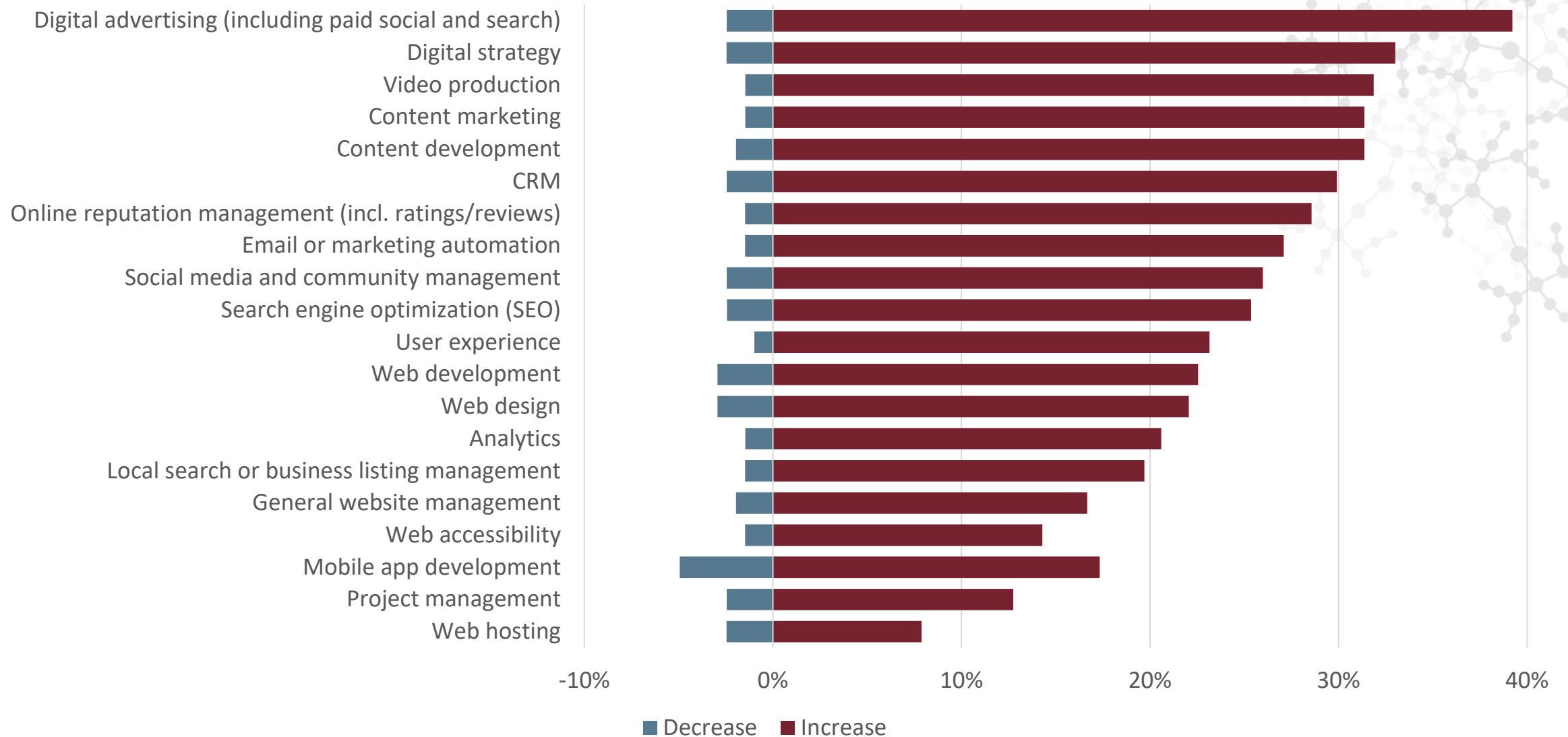
Team Size by Generalist/Specialist



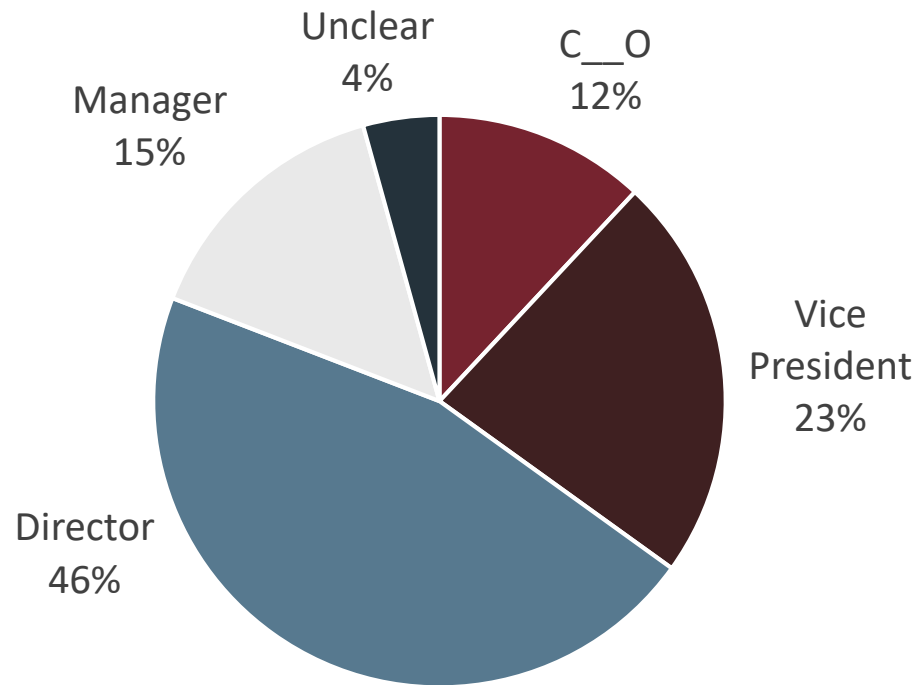
Average FTEs by Role and Leader/Laggard				
	Laggard	Average	Leader	Overall
Content development	1.68	2.04	2.19	1.98
Content marketing	1.52	1.67	2.28	1.82
General website management	1.48	1.83	2.10	1.80
Project management	1.45	1.21	2.05	1.56
Digital strategy	1.16	1.39	2.10	1.56
Web development	1.33	1.20	1.92	1.48
Digital advertising (including paid social and search)	1.11	1.45	1.44	1.33
Video production	1.02	1.29	1.46	1.26
Social media and community management	1.03	1.19	1.51	1.25
CRM	0.90	1.28	1.48	1.22
User experience	0.88	0.99	1.63	1.16
Analytics	0.88	1.11	1.30	1.10
Web design	0.94	1.05	1.12	1.03
Online reputation management (incl. ratings/reviews)	0.78	0.75	1.52	1.01
Email or marketing automation	0.77	1.02	1.09	0.97
Search engine optimization (SEO)	0.80	0.89	0.99	0.89
Local search or business listing management	0.64	0.69	1.18	0.83
Web accessibility	0.84	0.73	0.90	0.82
Mobile app development	0.33	1.44	0.57	0.80
Web hosting	0.73	0.52	0.98	0.74
Total	20.27	23.75	29.81	24.62



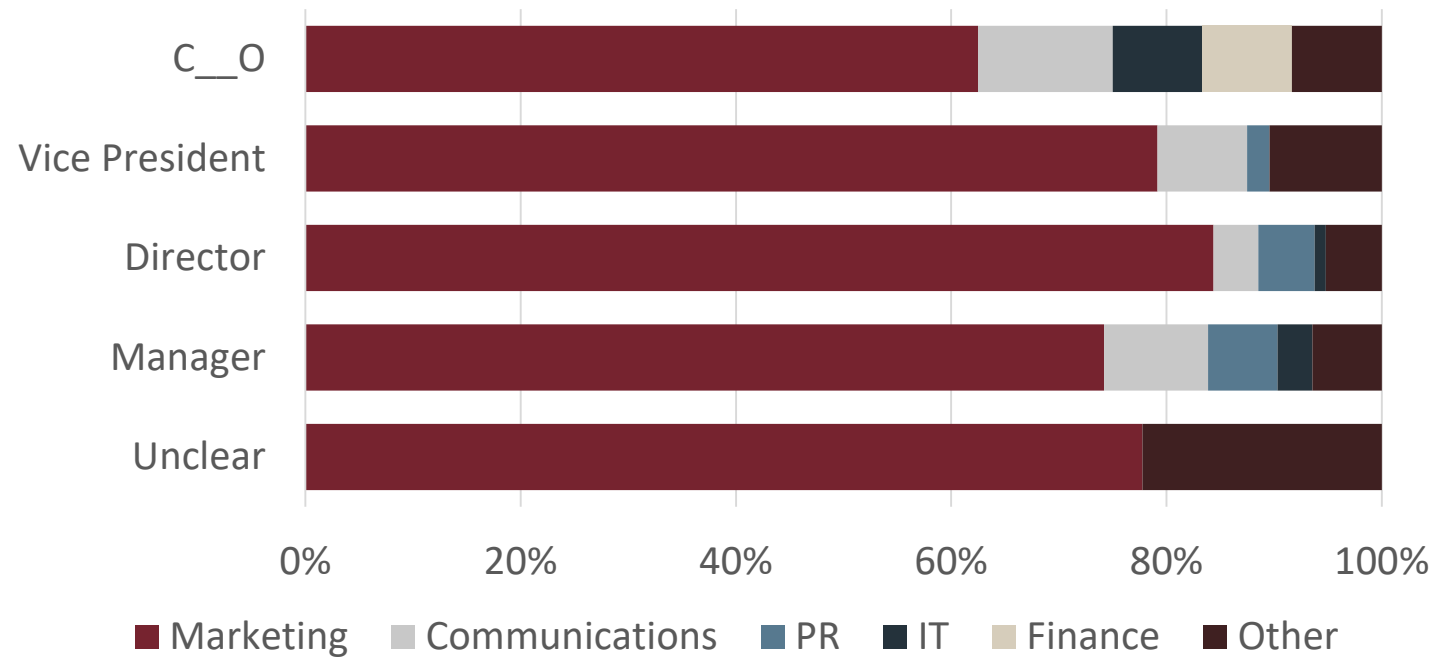
Top Areas for Growth



Highest Level Executive Responsible for Digital Marketing



Digital Marketing Ownership by Department



Final thoughts

- The report is coming soon!
 - Sign up at www.geonetric.com/waitlist
- Score yourself – which group is your organization in?
- Use the data for your planning.
- Use the data to fight for competitive resources!

