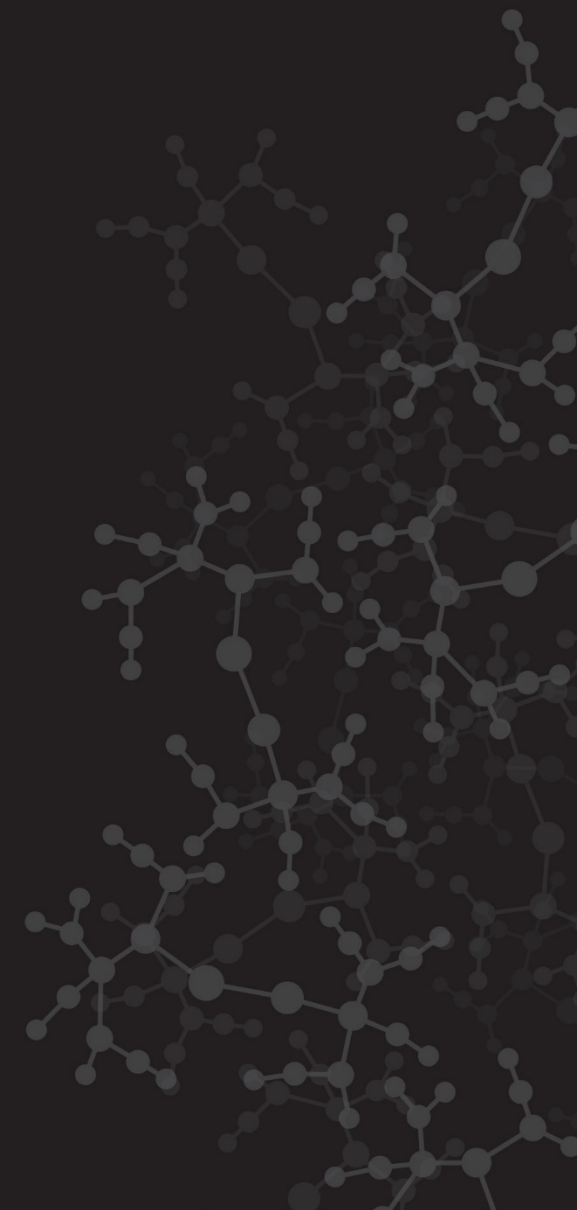


# Insights & Trends from Geonetric's 2020 Healthcare Digital Marketing Trends Survey



The Survey  
*10<sup>th</sup> Edition*



# Advisory Board



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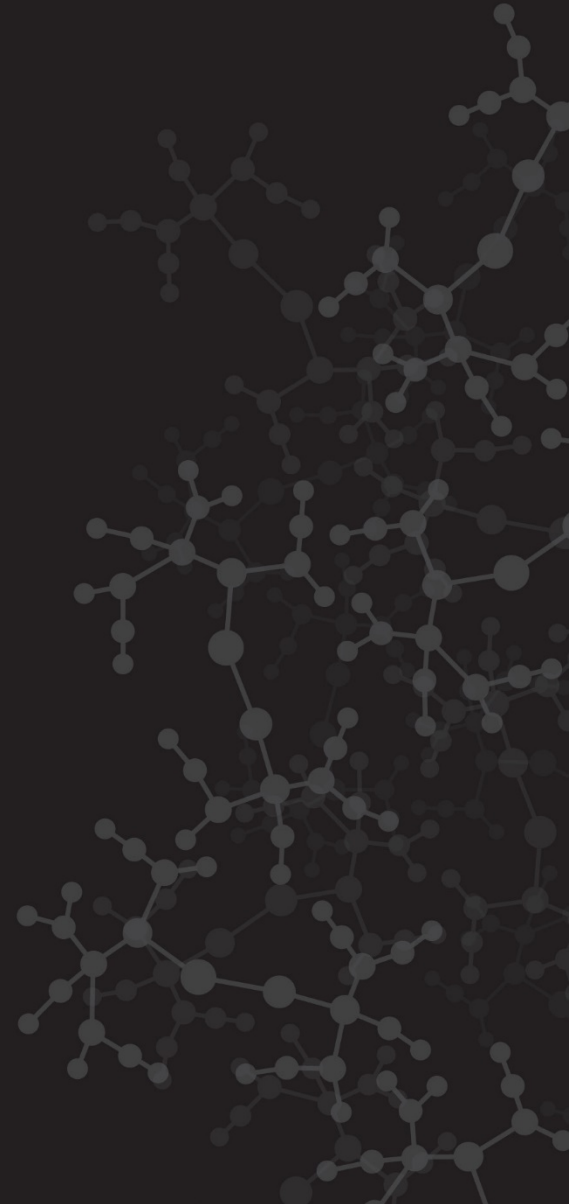


## “Deep dive” areas this year

- Impact of COVID-19 crisis on job satisfaction
- Impact of COVID-19 on digital marketing and digital transformation
- Intranets (Check out next month’s webinar!)
- Marketing personalization
- Content marketing

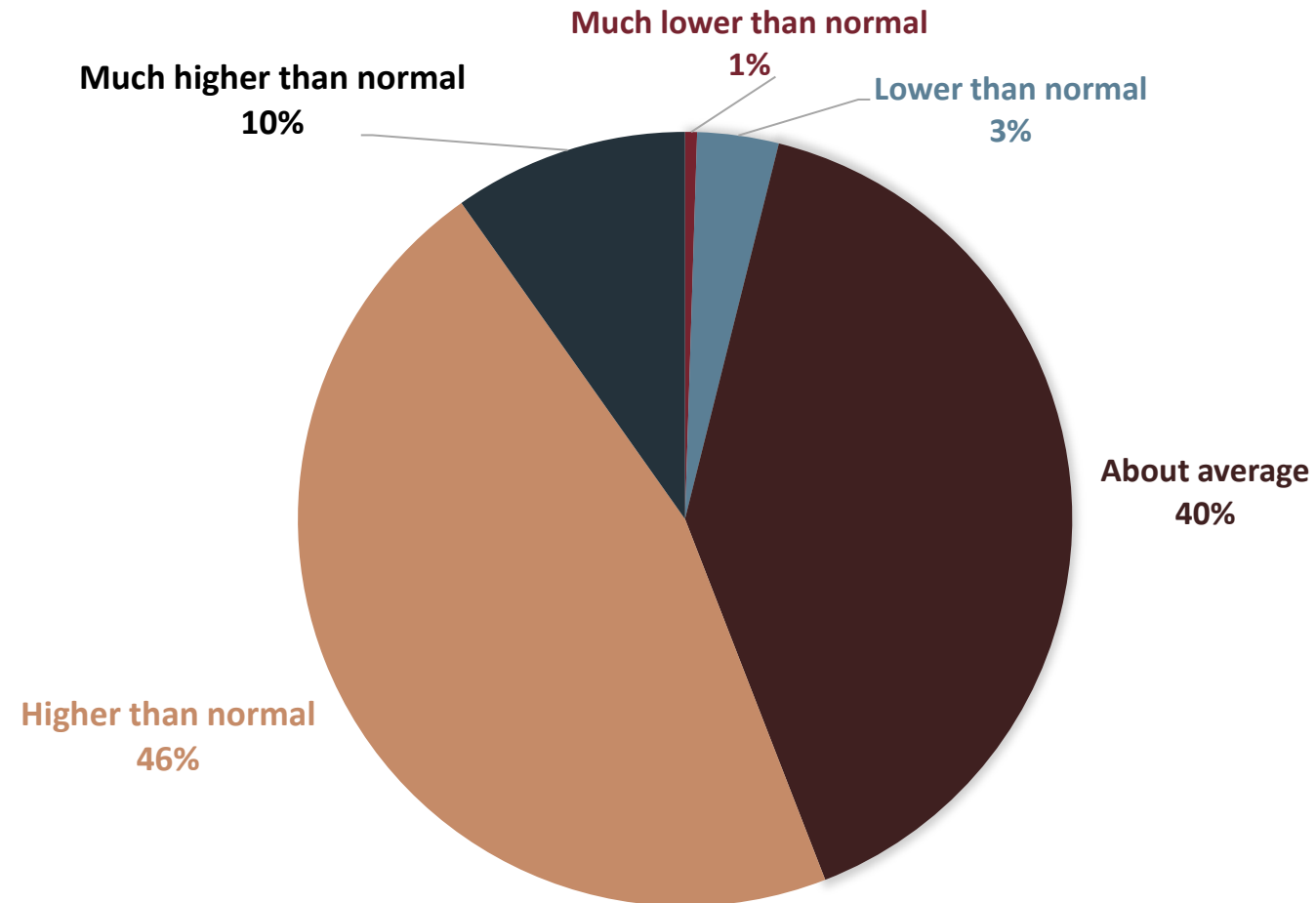


# Staff reaction to the pandemic



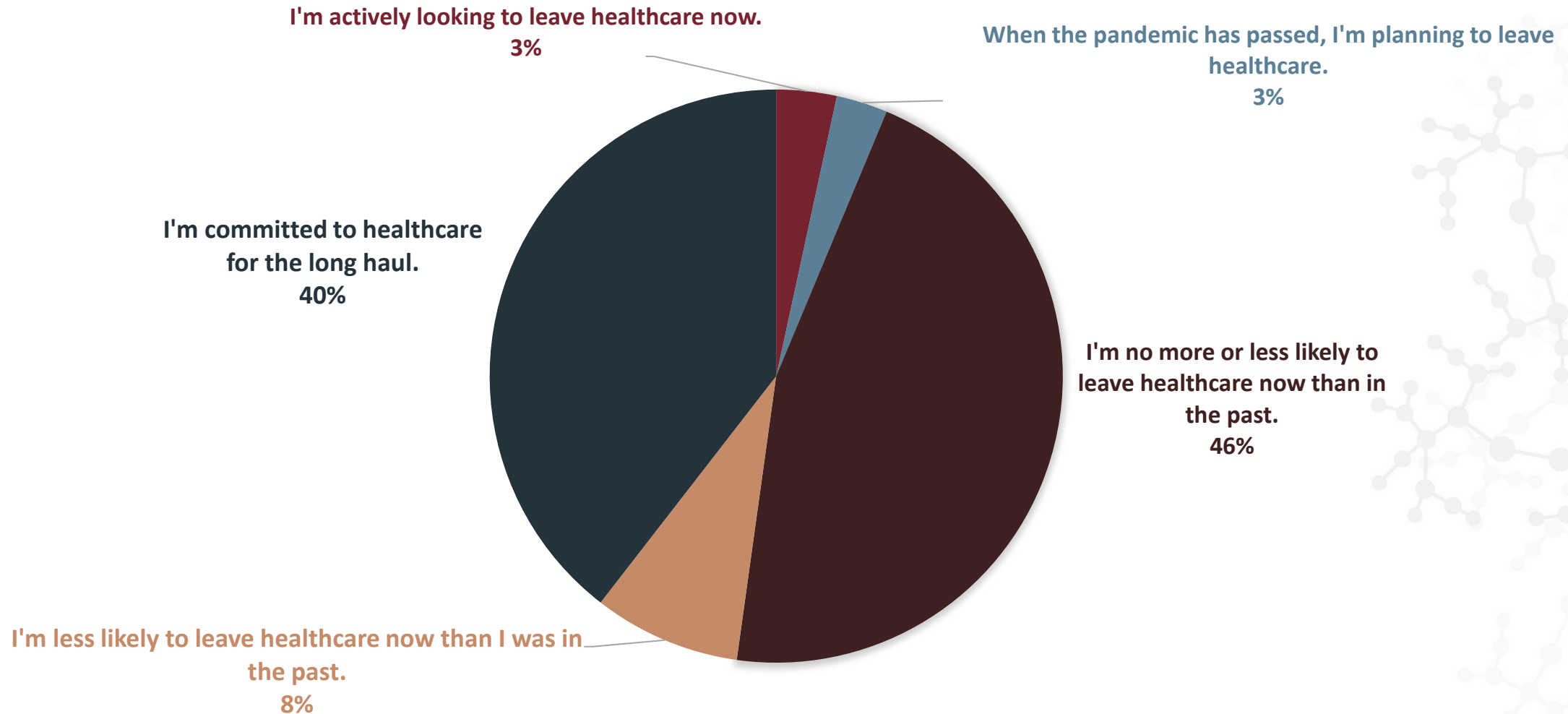


# What is your current level of work-related stress?



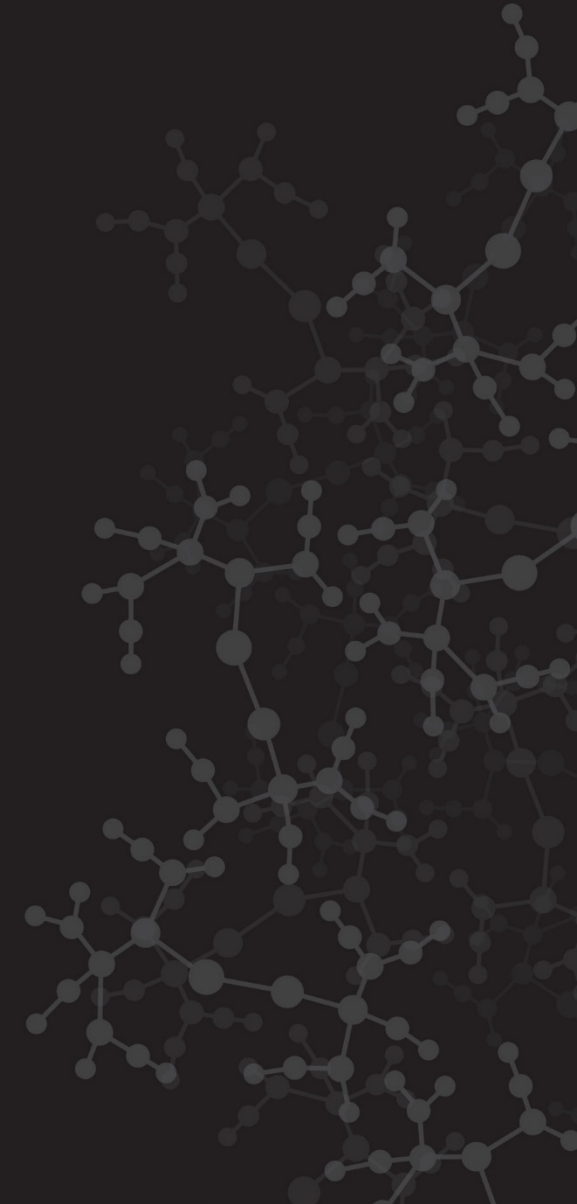


# How likely are you to be working in healthcare this time next year?





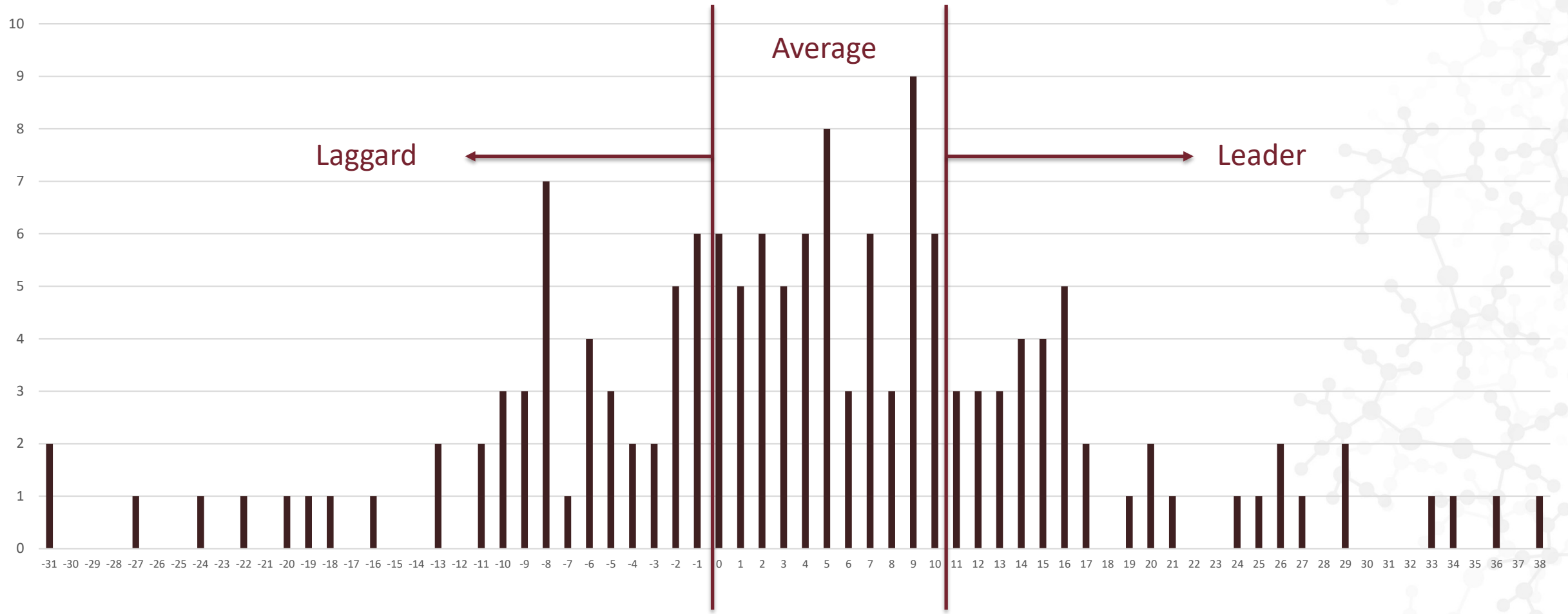
What leading organizations do differently







# Leader/Laggard Distribution



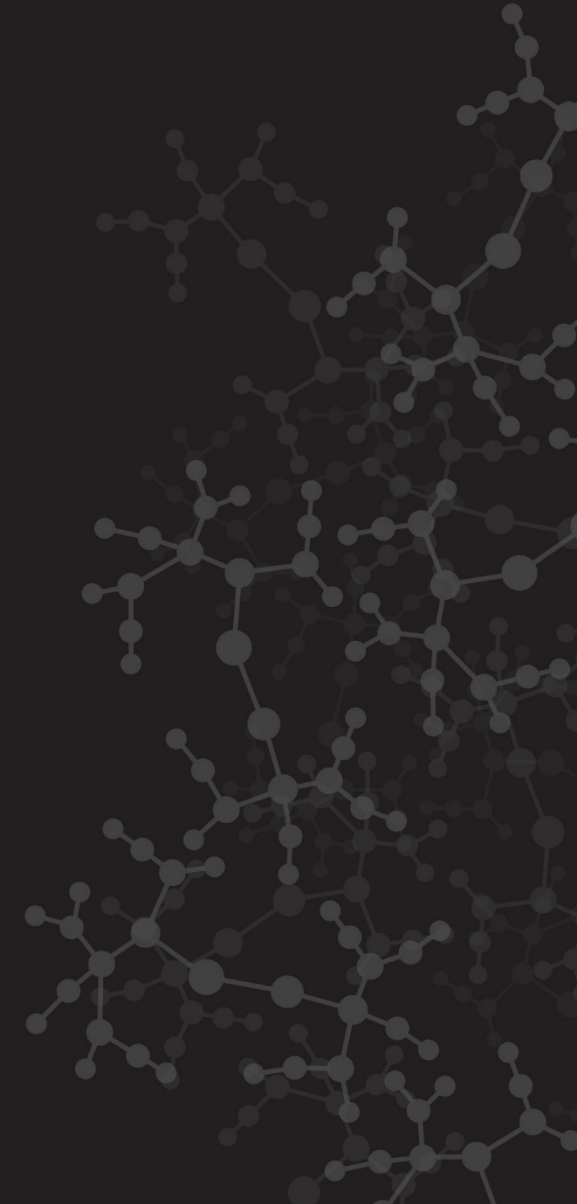


## Performance by Functional Area (Ordered by Overall)

	Laggard	Average	Leader	Overall	L/L Delta
Social Media and Community Management	0.15	0.75	1.39	0.72	1.24
Video Production	-0.12	0.61	1.07	0.49	1.19
General Website Management	-0.10	0.52	1.10	0.46	1.19
Web Accessibility	-0.04	0.44	1.13	0.45	1.16
Digital Advertising (Including Paid, Social, and Search)	-0.21	0.55	1.12	0.44	1.33
Web Design	-0.19	0.37	1.23	0.40	1.41
Web Hosting	0.00	0.33	0.95	0.38	0.95
Content Development	-0.53	0.47	1.22	0.32	1.75
Local Search or Business Listing Management	-0.36	0.44	1.02	0.32	1.38
Web Development	-0.21	0.21	1.15	0.31	1.36
Search Engine Optimization (SEO)	-0.34	0.18	1.17	0.27	1.51
Digital Strategy	-0.47	0.29	1.05	0.23	1.52
User Experience	-0.28	0.20	0.83	0.20	1.11
Content Marketing	-0.57	0.35	0.98	0.19	1.54
Online Reputation Management	-0.55	0.33	0.71	0.13	1.25
Project Management	-0.47	0.18	0.63	0.07	1.11
Analytics	-0.57	0.23	0.68	0.07	1.24
Intranet/Employee Portal	-0.51	-0.21	0.51	-0.12	1.02
CRM	-0.94	-0.14	0.29	-0.30	1.23
Email or Marketing Automation	-1.00	-0.32	0.34	-0.38	1.34
Mobile App Development	-1.15	-0.46	0.22	-0.52	1.37

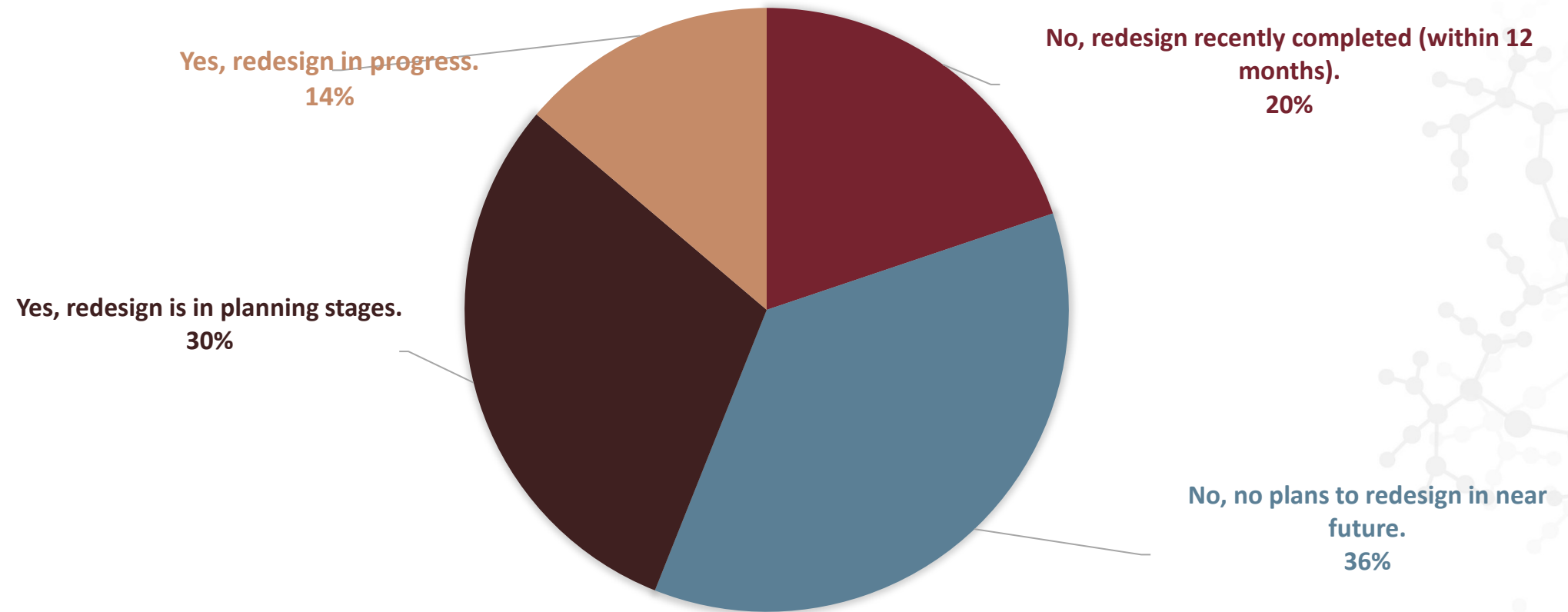


# Website redesign and CMS changes





# Website Redesign Plans





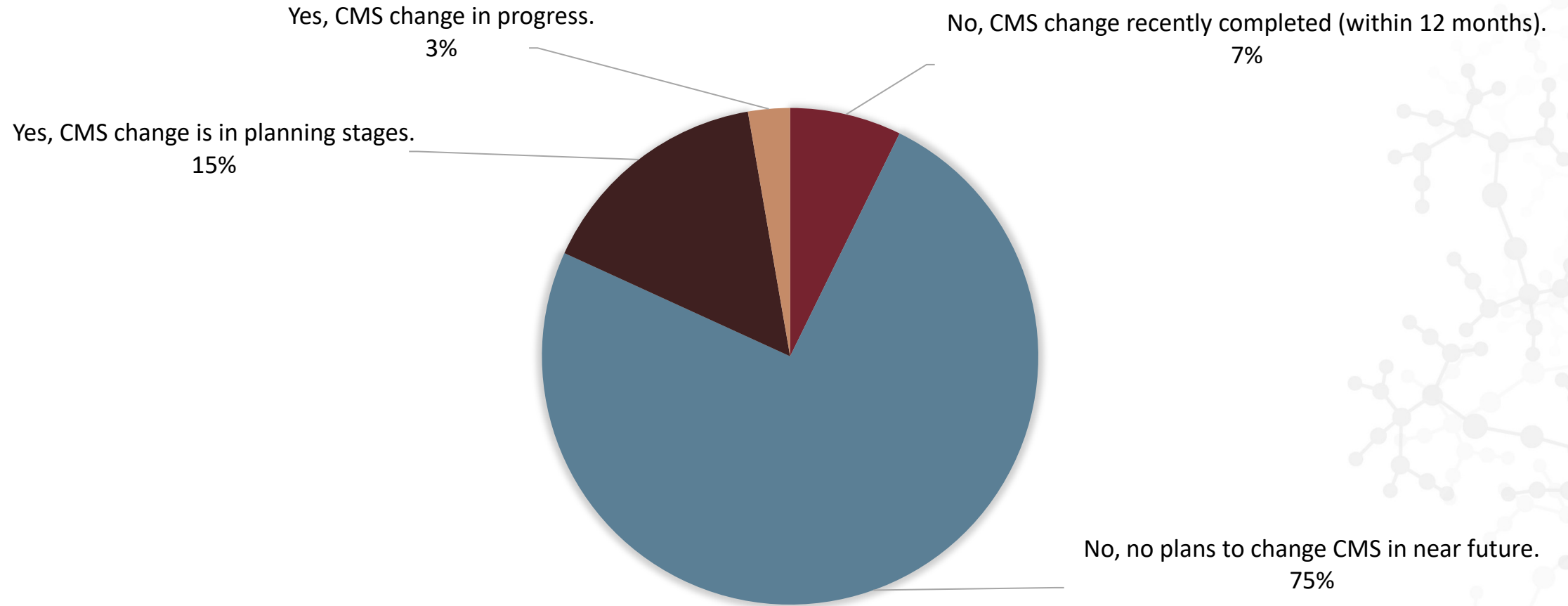
# Do you plan to redesign your main website?

Do you plan to  
redesign your main  
website?

	Laggard	Average	Leader	Overall
No, redesign recently completed (within 12 months).	13%	26%	21%	20%
No, no plans to redesign in near future.	35%	26%	55%	36%
Yes, redesign is in planning stages.	40%	32%	14%	30%
Yes, redesign in progress.	13%	17%	10%	14%



# Website CMS Plans





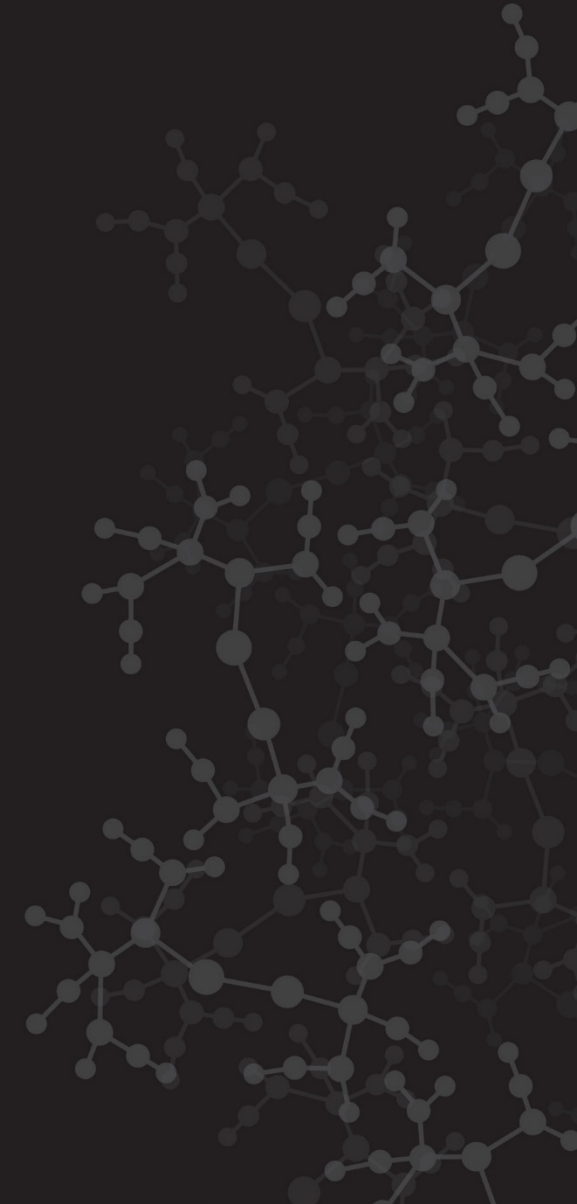
# Website Redesign vs. CMS Change

Planned CMS  
Change

	No, no plans to redesign in near future.	No, redesign recently completed.	Yes, redesign is in planning stages.	Yes, redesign in progress.	Overall
No, no plans to change CMS in near future.	97%	76%	47%	73%	75%
No, CMS change recently completed.	0%	24%	0%	13%	7%
Yes, CMS change is in planning stages.	0%	0%	50%	7%	16%
Yes, CMS change in progress.	3%	0%	3%	7%	3%



# Goals and barriers







How important are each of the following for the future success of your digital marketing efforts?

	Laggard	Average	Leader	Overall
Patient Acquisition	1.30	1.43	1.39	1.38
Consumer Awareness	1.16	1.17	1.41	1.23
Consumer Engagement	1.07	1.21	1.44	1.22
Consumer Experience	1.07	1.19	1.32	1.19
Profitability	1.14	1.25	1.12	1.18
Patient Satisfaction	1.20	1.21	1.09	1.18
Revenue	1.12	1.27	1.03	1.16
Return on Investment (ROI)	0.84	1.31	0.97	1.06
Community Relations	0.53	0.63	0.97	0.69
Physician Engagement	0.51	0.41	0.53	0.48
Population Health	0.23	0.41	0.72	0.43
Employee Recruiting Efforts	0.27	0.38	0.36	0.34
Fundraising/Giving	0.05	0.15	0.21	0.14

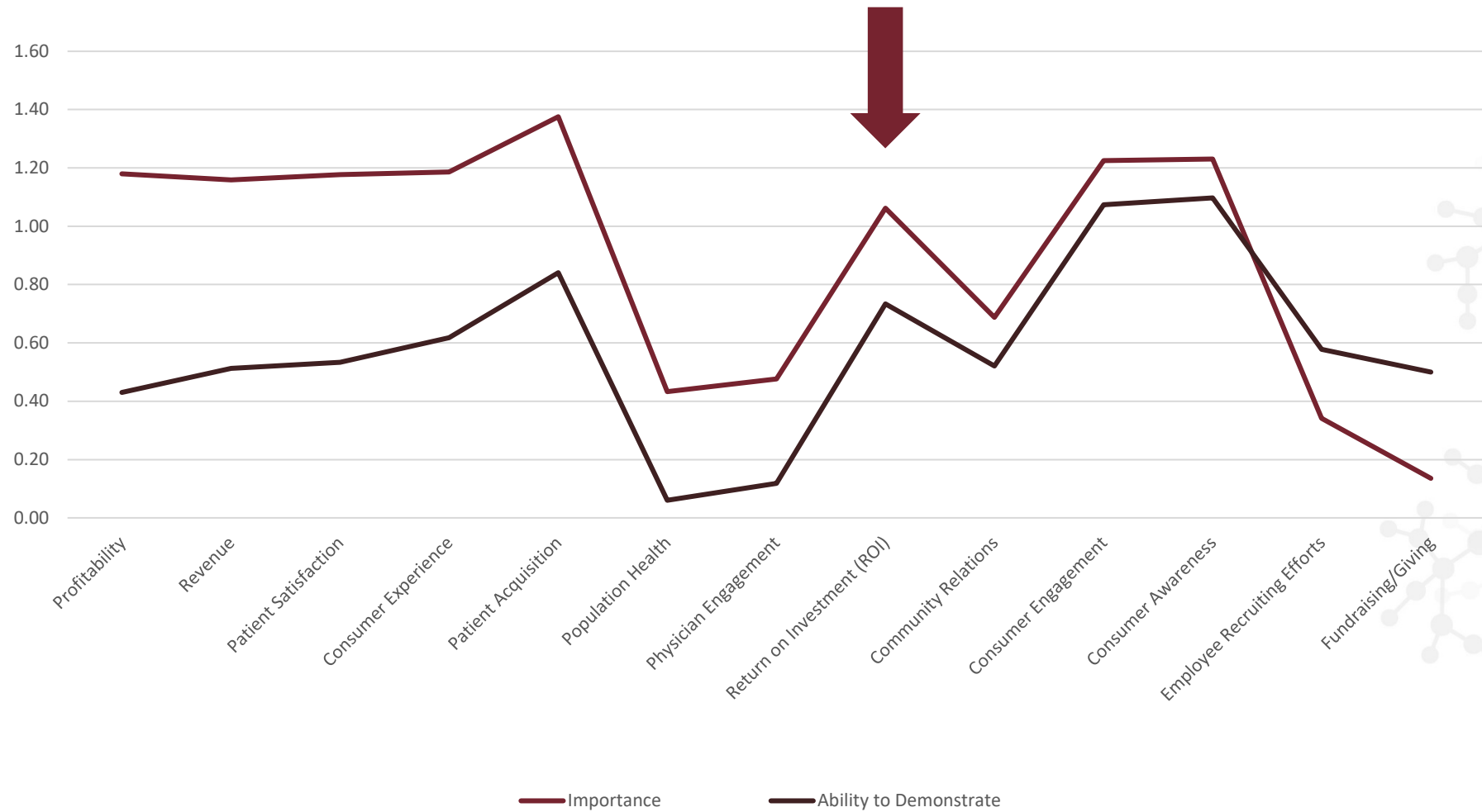


## Our organization is able to demonstrate how digital marketing has improved...

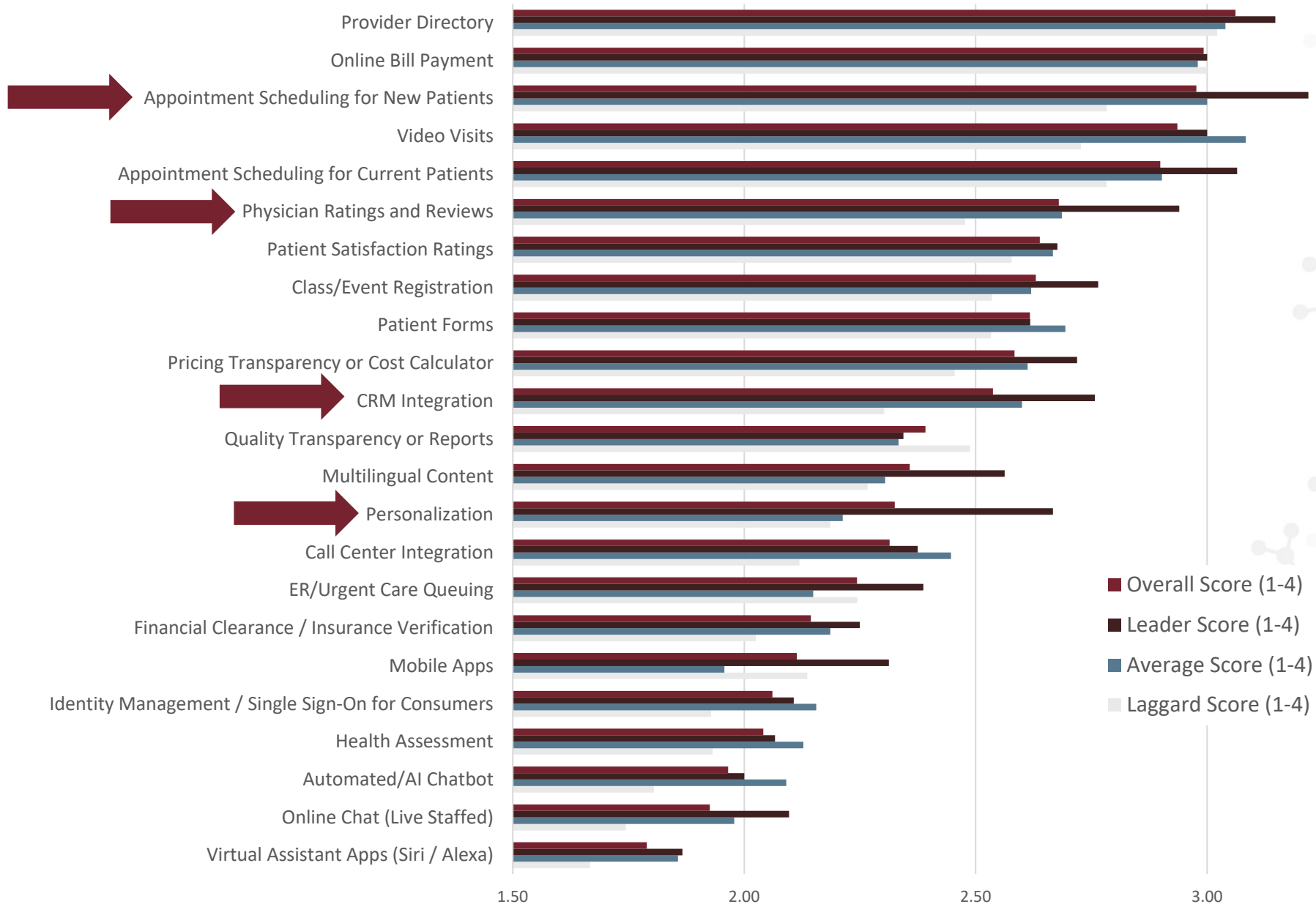
	Laggard	Average	Leader	Overall
Consumer Awareness	0.91	1.07	1.38	1.10
Consumer Engagement	0.86	1.17	1.21	1.07
New Patient Recruitment	0.47	1.00	1.13	0.84
Return on Investment (ROI)	0.51	0.91	0.76	0.73
Consumer Experience	0.39	0.71	0.79	0.62
Employee Recruiting Efforts	0.59	0.48	0.71	0.58
Patient Satisfaction	0.43	0.57	0.63	0.53
Community Relations	0.33	0.43	0.88	0.52
Revenue	0.30	0.59	0.67	0.51
Fundraising/Giving	0.41	0.44	0.70	0.50
Profitability	0.20	0.55	0.57	0.43
Population Health	-0.10	0.10	0.45	0.12
Physician Engagement	-0.10	-0.02	0.38	0.06



# Importance vs. Ability to Demonstrate

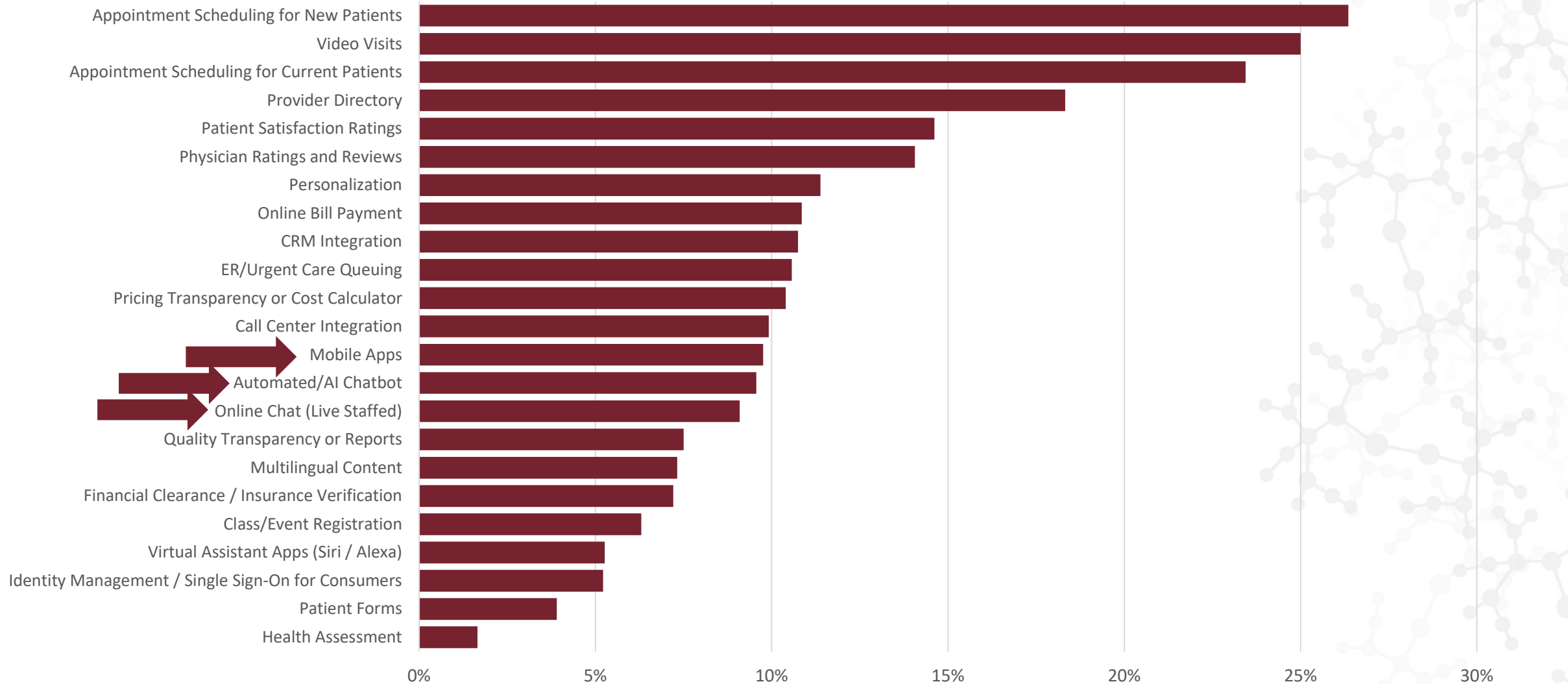


# Importance of Website Features



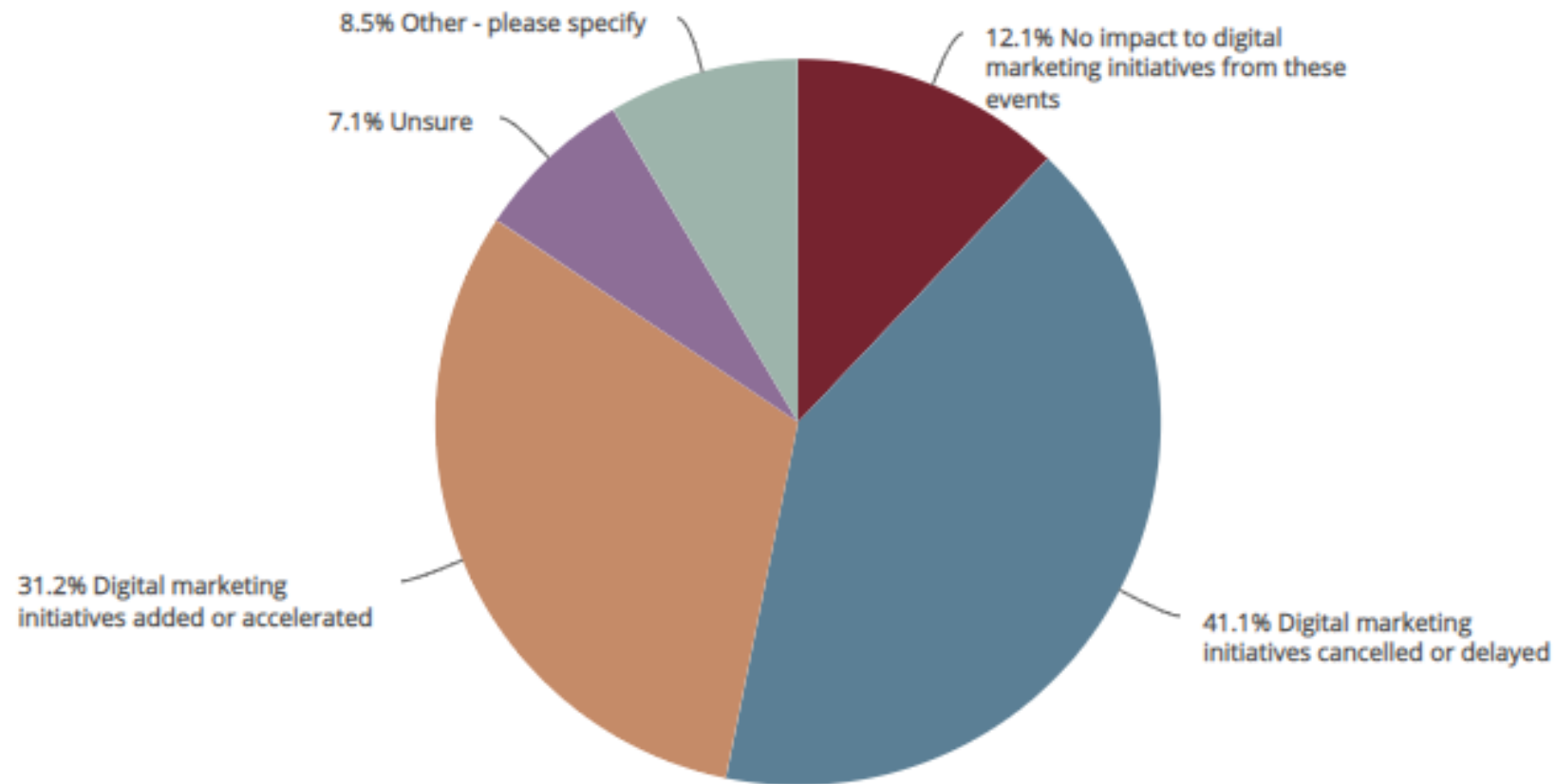


# Competitive Differentiators



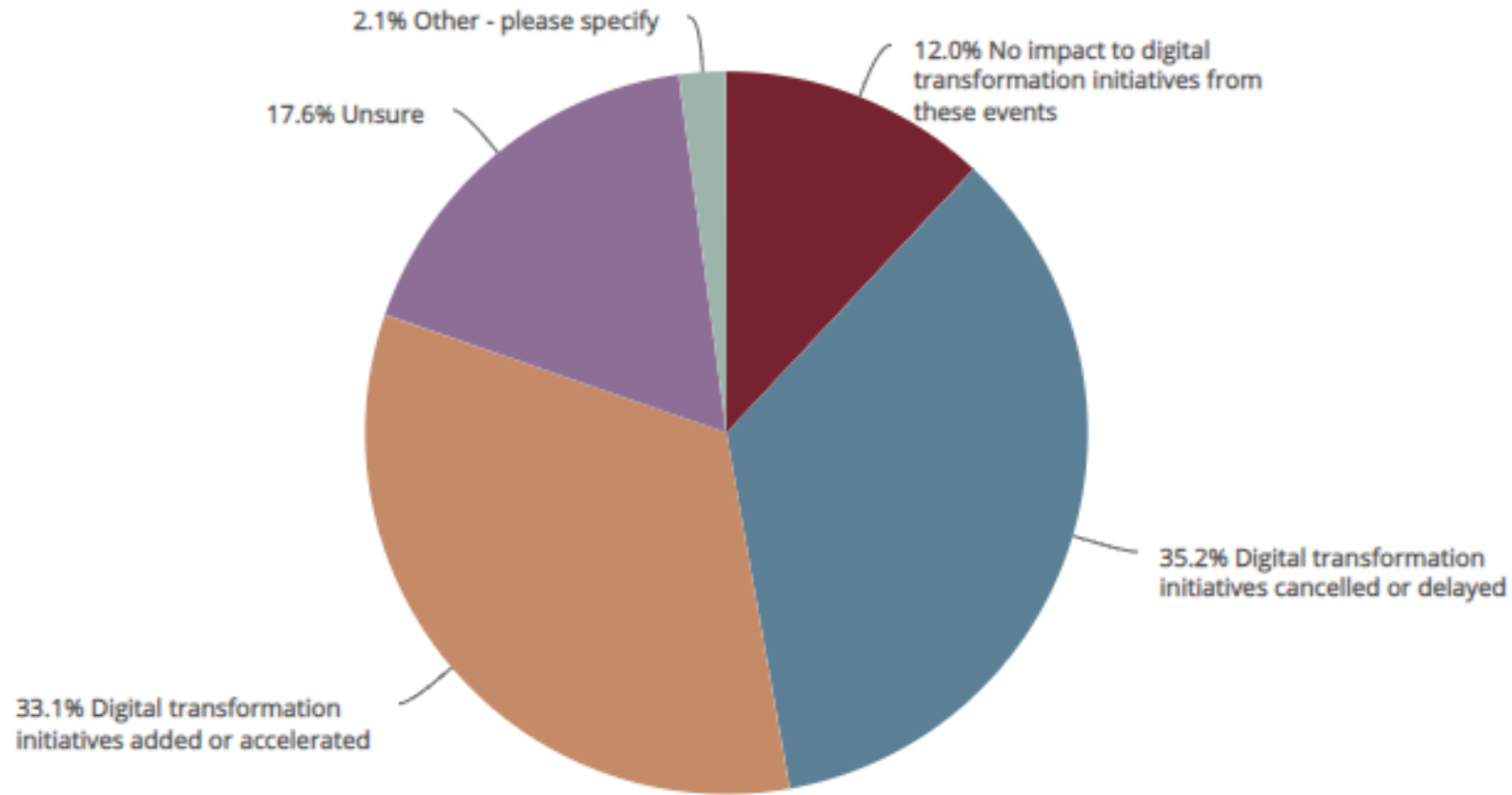


# How has the pandemic impacted digital marketing initiatives?





# How has the pandemic impacted digital transformation initiatives?



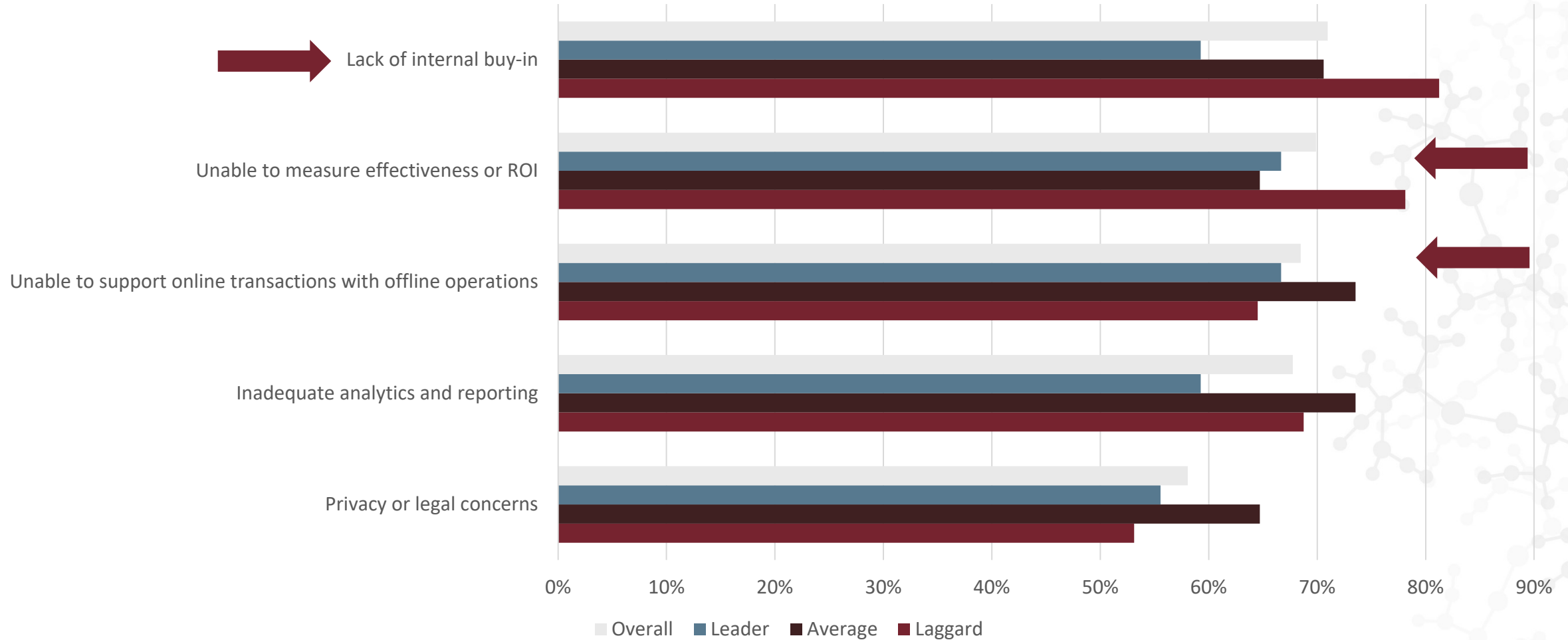


# Barriers to digital marketing success





# How much of a problem are the following to your organization's digital marketing efforts?



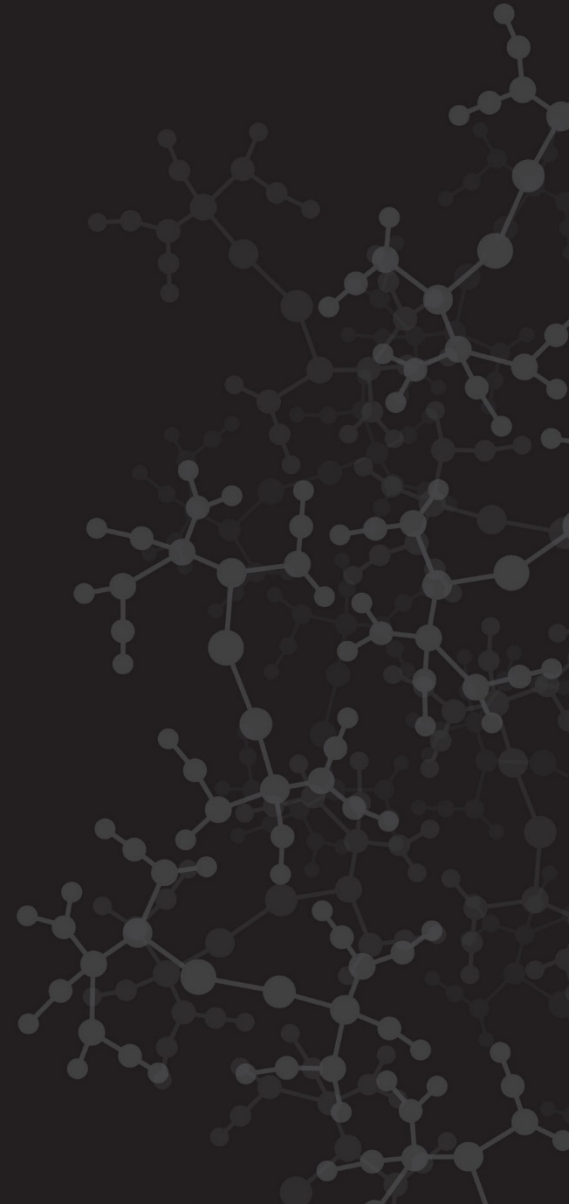


# What prevents your organization from demonstrating return on investment (ROI)?

	Laggard	Average	Leader	Overall
Lack of tools/infrastructure	80%	43%	80%	68%
No formal justification required (no one's asking)	50%	43%	60%	50%
Need an easier way	30%	0%	20%	18%
Too time consuming	30%	14%	0%	18%
We can measure ROI but it's not positive/improving	10%	29%	0%	14%
Lack of expertise	10%	14%	0%	9%
Other - please specify	10%	14%	0%	9%

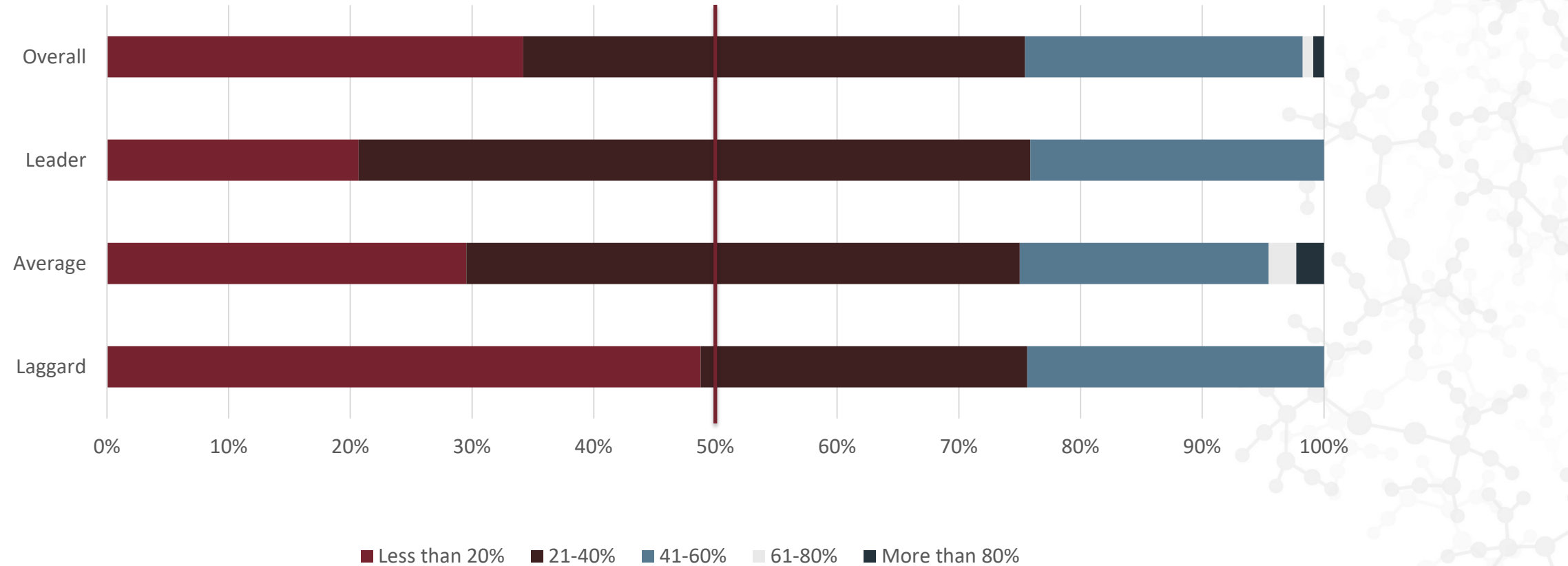


Budget





## Percent of Overall Marketing Budget Dedicated to Digital





## Expected change in overall marketing budget

	Laggard	Average	Leader	Overall
Decrease	43.48%	44.00%	35.29%	41.54%
Remain the same	41.30%	46.00%	55.88%	46.92%
Increase	15.22%	10.00%	8.82%	11.54%

## Expected change in digital marketing budget

	Laggard	Average	Leader	Overall
Decrease	22.22%	29.41%	9.09%	21.71%
Remain the same	40.00%	35.29%	45.45%	39.53%
Increase	37.78%	35.29%	45.45%	38.76%



Digital Marketing  
Budget

## Change in digital marketing budget by change in overall marketing budget

		Overall Marketing Budget			Overall
		Decrease	Remain the Same	Increase	
Decrease		51.92%	0.00%	0.00%	21.77%
Remain the same		30.77%	58.62%	0.00%	40.32%
Increase		17.31%	41.38%	100.00%	37.90%

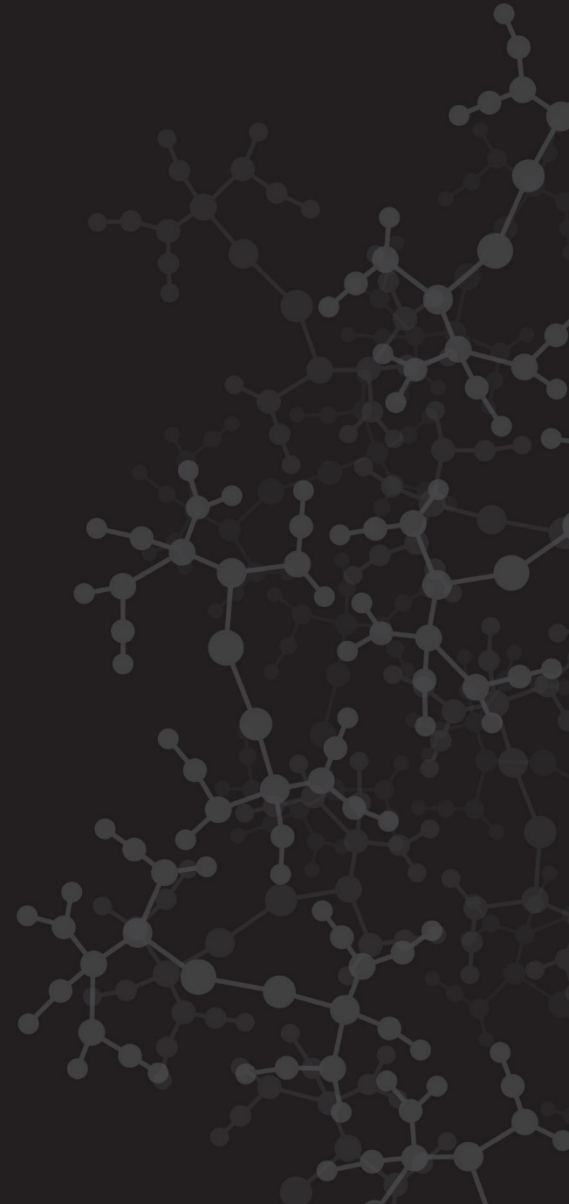


## Average Non-Staff Digital Marketing Budget

Overall	\$	703,340.13
Leader	\$	1,266,235.29
Average	\$	616,281.25
Laggard	\$	452,105.56



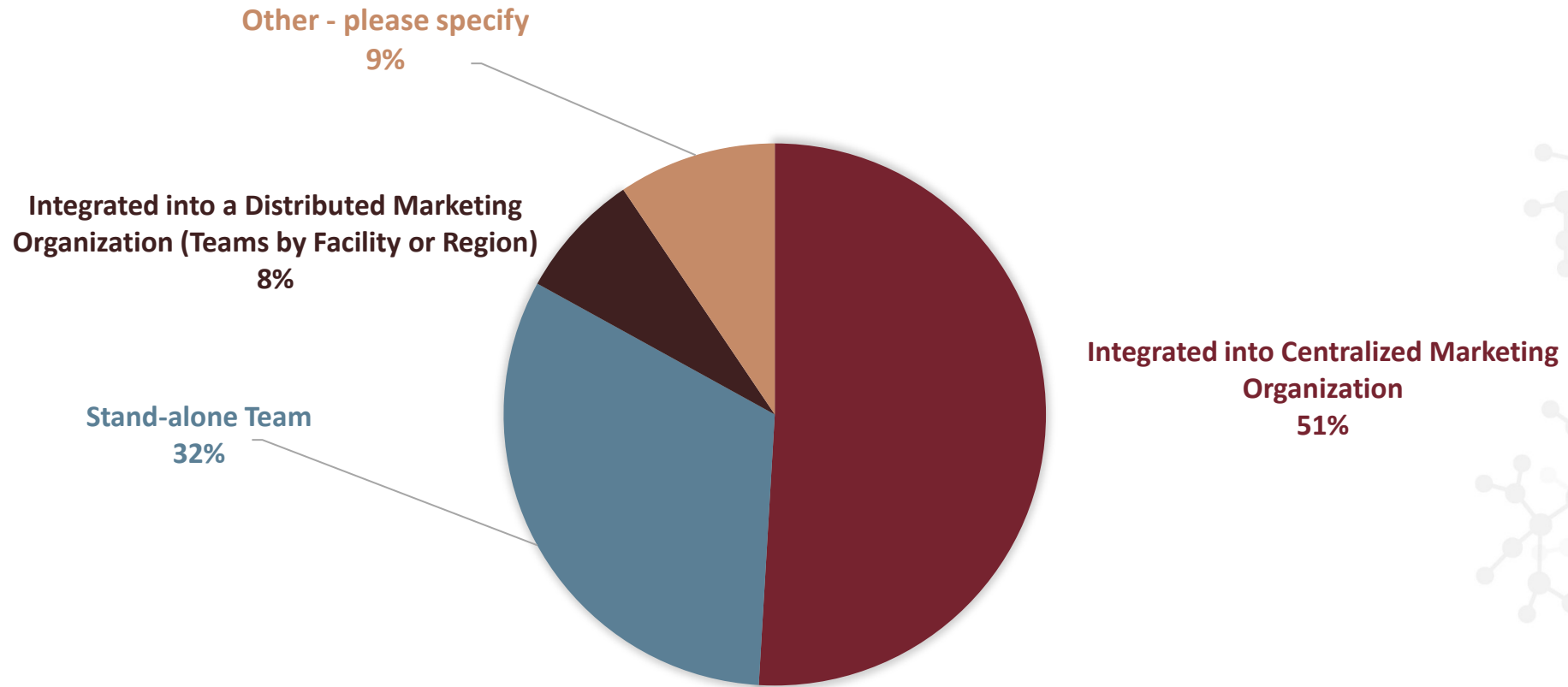
# Staffing and team structure





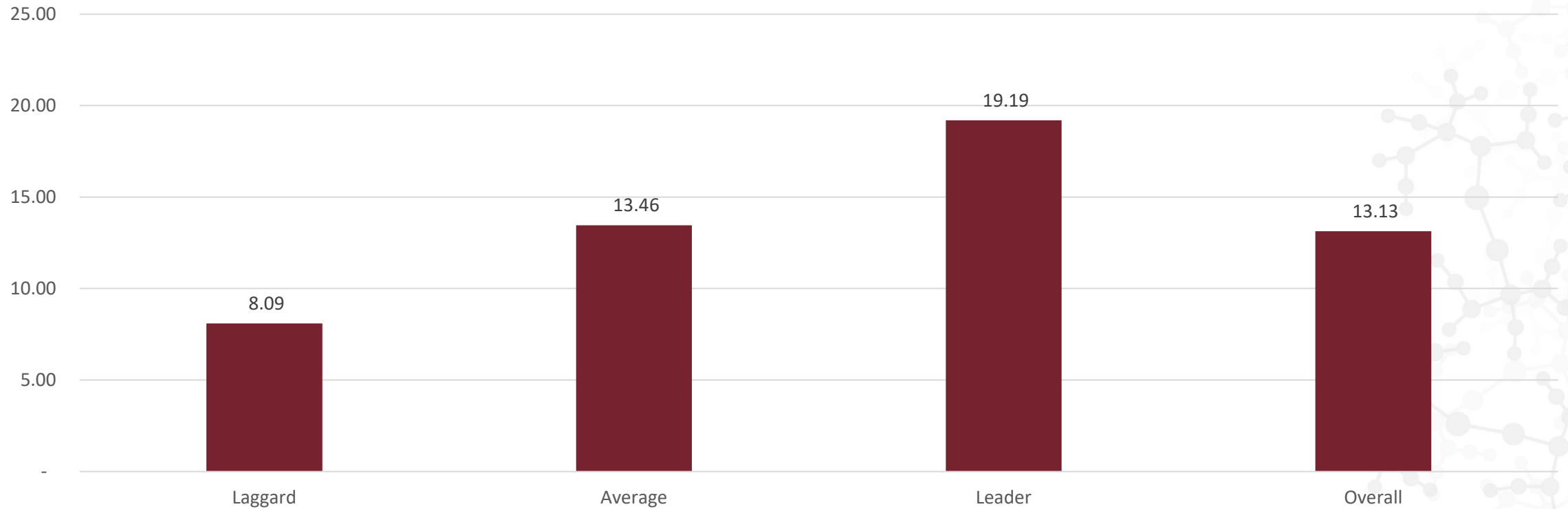


# Where does digital marketing primarily live in your organization?





## Team Size (FTEs)





## FTE by function sorted by Overall

	Laggard	Average	Leader	Overall	L/L Delta
General Website Management	0.89	1.50	1.29	1.23	0.40
Content Development	0.77	1.22	1.74	1.20	0.97
Social Media and Community Management	0.73	0.92	1.12	0.90	0.39
Video Production	0.68	0.73	1.27	0.86	0.59
Intranet/Employee Portal	0.70	0.71	1.08	0.81	0.39
Digital Strategy	0.39	0.86	1.25	0.80	0.86
Content Marketing	0.40	0.88	1.12	0.78	0.72
Digital Advertising (Including Paid, Social, and Search)	0.40	0.72	1.13	0.72	0.73
Project Management	0.34	0.70	1.12	0.69	0.78
Email or Marketing Automation	0.20	0.66	0.83	0.55	0.63
Analytics	0.34	0.58	0.75	0.54	0.41
Web Development	0.44	0.43	0.81	0.53	0.37
CRM	0.18	0.67	0.75	0.52	0.57
Web Design	0.35	0.41	0.81	0.50	0.47
Search Engine Optimization (SEO)	0.20	0.43	0.77	0.44	0.57
User Experience	0.30	0.33	0.70	0.42	0.40
Online Reputation Management (Including Ratings and Reviews)	0.19	0.40	0.50	0.35	0.32
Web Accessibility	0.15	0.41	0.52	0.35	0.36
Web Hosting	0.18	0.36	0.53	0.34	0.35
Local Search or Business Listing Management	0.17	0.31	0.60	0.34	0.43
Mobile App Development	0.09	0.24	0.49	0.26	0.40
Total	8.09	13.46	19.19	13.13	



## Change in Staffing (Net Increase-Decrease)

	Laggard	Average	Leader	Overall
Email or Marketing Automation	8%	22%	6%	13%
Video Production	16%	10%	12%	13%
CRM	12%	17%	4%	12%
Digital Advertising (Including Paid, Social, and Search)	4%	12%	21%	11%
General Website Management	14%	10%	9%	11%
Digital Strategy	2%	14%	18%	11%
Content Development	14%	10%	3%	10%
Intranet/Employee Portal	2%	15%	13%	9%
Mobile App Development	6%	7%	16%	9%
Analytics	6%	8%	12%	8%
Content Marketing	2%	14%	9%	8%
Social Media and Community Management	10%	6%	9%	8%
Search Engine Optimization (SEO)	2%	8%	15%	8%
Online Reputation Management (Including Ratings and Reviews)	2%	13%	3%	6%
Web Development	8%	6%	3%	6%
Web Accessibility	4%	7%	3%	5%
User Experience	4%	2%	9%	5%
Local Search or Business Listing Management	4%	8%	0%	5%
Project Management	4%	2%	6%	4%
Web Design	8%	0%	3%	4%
Web Hosting	4%	0%	3%	2%



## Overall effort to be provided by a vendors/consultants

	Laggard	Average	Leader	Overall	
Web Hosting	0.66	0.78	0.66	0.70	}
Web Development	0.52	0.56	0.45	0.52	
Digital Advertising (Including Paid, Social, and Search)	0.52	0.45	0.53	0.50	
Web Design	0.47	0.56	0.42	0.49	
Video Production	0.37	0.41	0.38	0.39	
Web Accessibility	0.37	0.38	0.36	0.37	
Local Search or Business Listing Management	0.24	0.41	0.39	0.34	
CRM	0.32	0.33	0.37	0.34	
Search Engine Optimization (SEO)	0.33	0.33	0.33	0.33	
Analytics	0.28	0.34	0.36	0.32	
Digital Strategy	0.35	0.29	0.33	0.32	
Online Reputation Management (Including Ratings and Reviews)	0.27	0.34	0.35	0.32	
General Website Management	0.31	0.30	0.24	0.29	
Content Development	0.28	0.25	0.35	0.29	
Content Marketing	0.24	0.20	0.32	0.24	
Mobile App Development	0.27	0.17	0.31	0.24	
User Experience	0.26	0.22	0.24	0.24	
Email or Marketing Automation	0.22	0.18	0.29	0.22	}
Social Media and Community Management	0.16	0.10	0.16	0.14	
Project Management	0.11	0.14	0.14	0.13	
Intranet/Employee Portal	0.12	0.11	0.15	0.12	

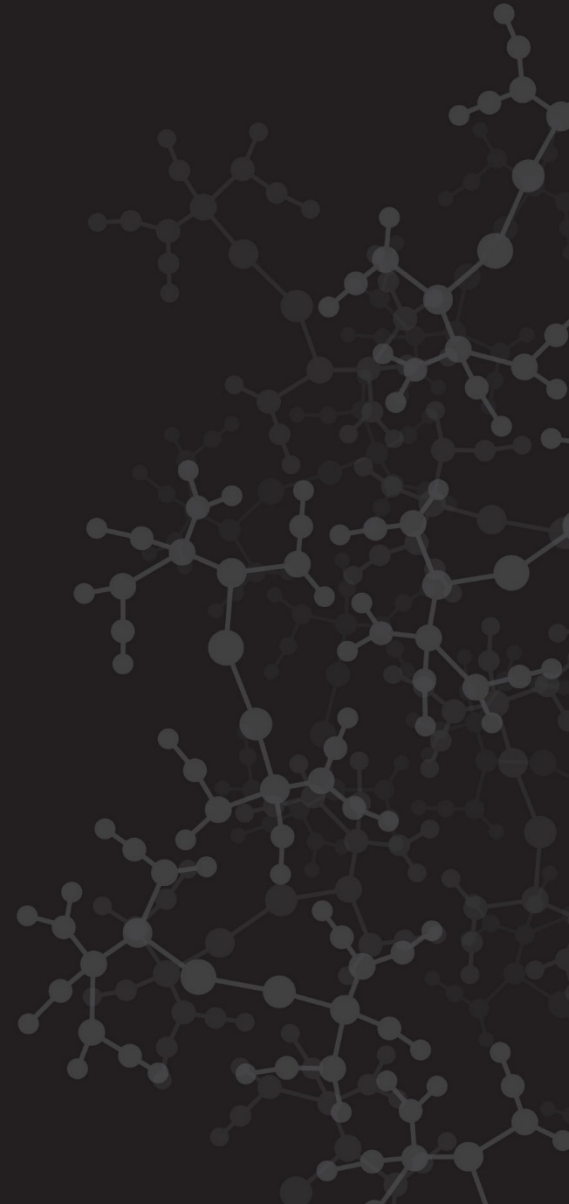


## Change in non-staff Investment (Net Increase-Decrease)

	Laggard	Average	Leader	Overall
Digital Advertising (Including Paid, Social, and Search)	2.13%	13.73%	36.36%	15.27%
Video Production	14.58%	7.84%	27.27%	15.15%
Web Design	14.58%	16.00%	12.12%	14.50%
Email or Marketing Automation	12.77%	12.50%	18.18%	14.06%
Online Reputation Management (Including Ratings and Reviews)	10.64%	14.58%	15.63%	13.39%
CRM	20.45%	2.17%	17.24%	12.61%
Web Development	14.89%	10.20%	12.12%	12.40%
Search Engine Optimization (SEO)	8.70%	10.42%	18.75%	11.90%
Local Search or Business Listing Management	4.26%	12.00%	21.88%	11.63%
General Website Management	8.33%	16.00%	6.06%	10.69%
Digital Strategy	6.38%	4.08%	21.21%	9.30%
Web Accessibility	10.20%	8.33%	9.38%	9.30%
Web Hosting	6.52%	6.12%	12.50%	7.87%
User Experience	8.51%	4.08%	9.38%	7.03%
Content Development	9.09%	2.04%	9.09%	6.35%
Social Media and Community Management	4.17%	2.04%	12.50%	5.43%
Mobile App Development	4.55%	4.26%	6.25%	4.88%
Content Marketing	9.09%	2.04%	3.13%	4.80%
Intranet/Employee Portal	6.38%	2.13%	3.03%	3.94%
Analytics	4.55%	-6.12%	0.00%	-0.79%
Project Management	2.27%	-8.51%	3.03%	-1.61%

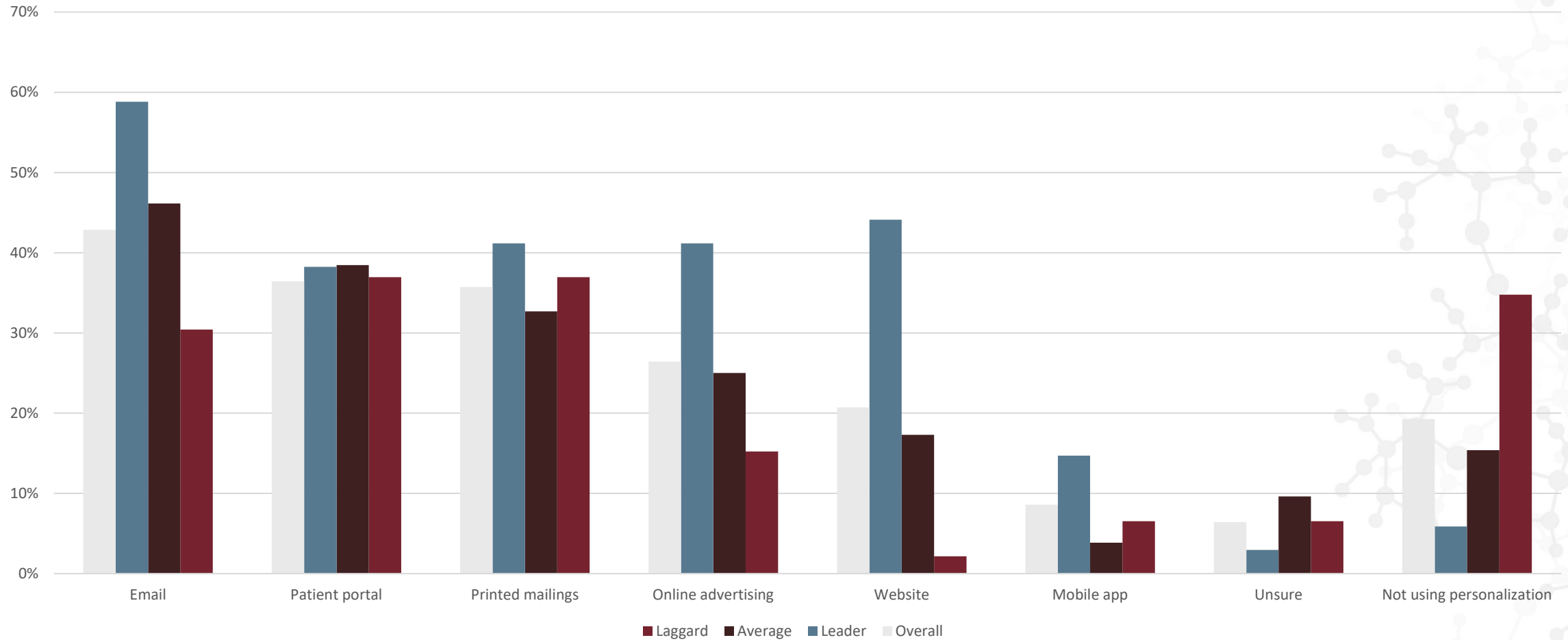


# Personalization





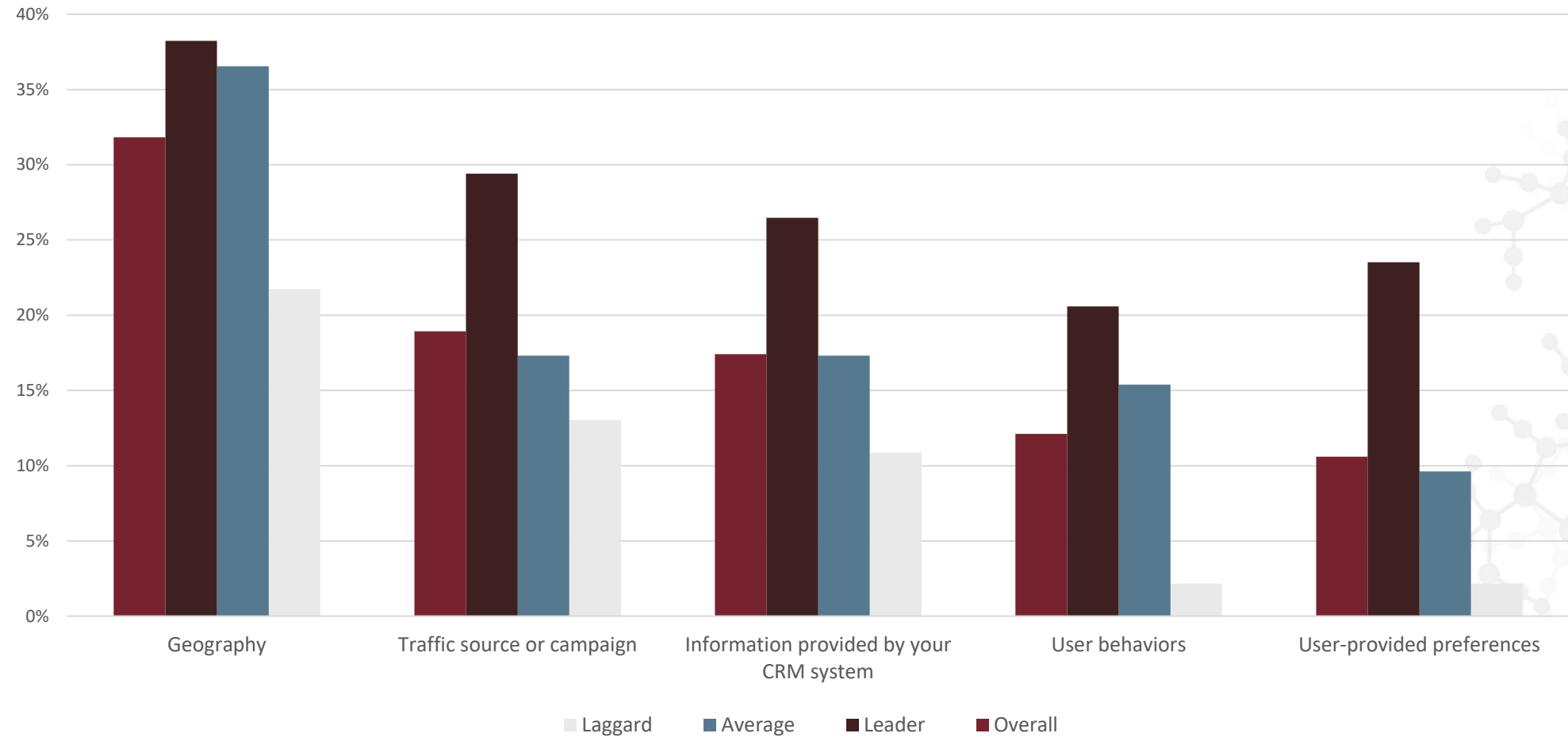
# Where are you using marketing personalization?







# Website Personalization Methods





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

