

The State of Digital Marketing in Healthcare in 2021

Survey Advisory Board

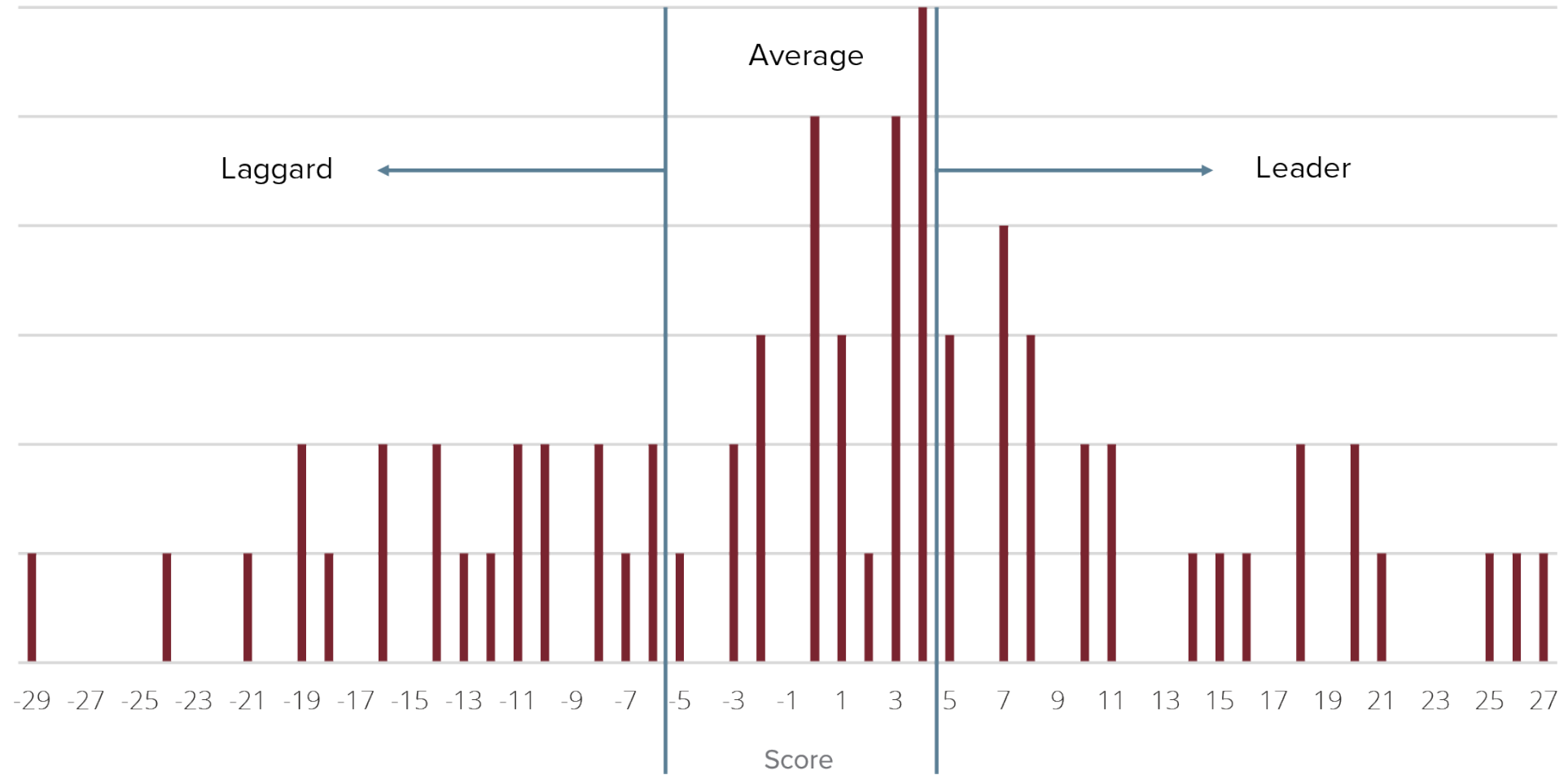
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Segments: leader, average and laggard

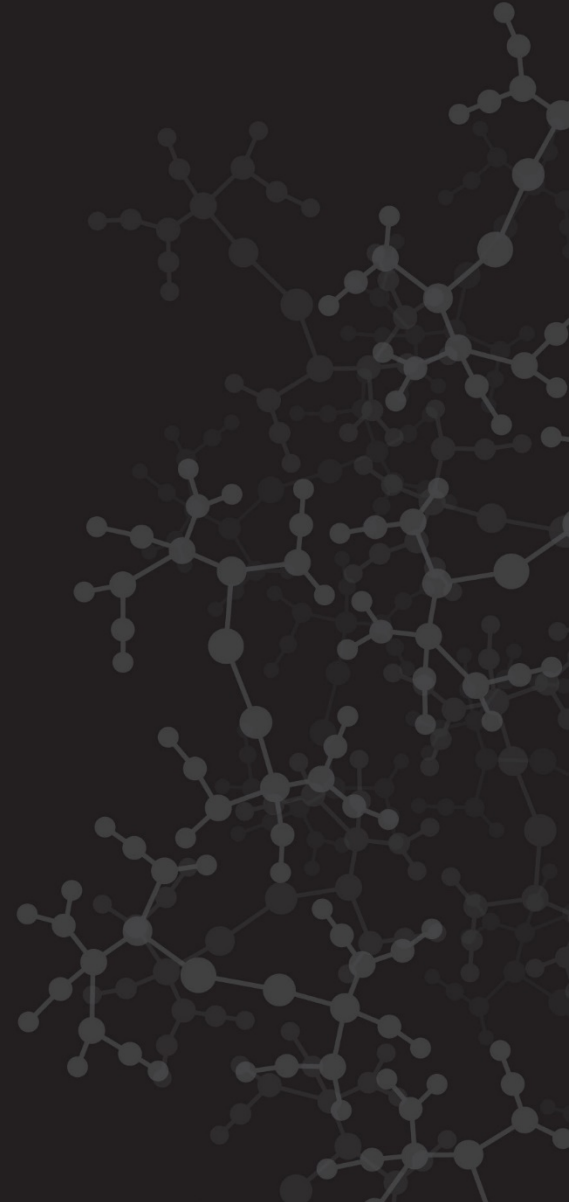


Leader/Laggard Distribution





Where are we doing well?



Performance by Function

| | Laggard | Average | Leader | Overall | L/L Delta |
|---|---------|---------|--------|---------|-----------|
| Social media and community management | 0.09 | 0.56 | 1.04 | 0.59 | 0.95 |
| Web hosting | 0.23 | 0.41 | 0.54 | 0.40 | 0.31 |
| Web design | -0.22 | 0.56 | 0.71 | 0.40 | 0.93 |
| Local search or business listing management | -0.35 | 0.31 | 0.93 | 0.34 | 1.28 |
| Digital advertising | -0.61 | 0.25 | 1.22 | 0.33 | 1.83 |
| General website management | -0.57 | 0.25 | 1.00 | 0.28 | 1.57 |
| Video production | -0.61 | 0.32 | 0.89 | 0.26 | 1.50 |
| Web development | -0.30 | 0.32 | 0.57 | 0.23 | 0.88 |
| Search engine optimization (SEO) | -0.77 | 0.31 | 0.93 | 0.22 | 1.70 |
| Digital strategy | -0.91 | 0.25 | 1.00 | 0.18 | 1.91 |
| Web accessibility | -0.26 | 0.16 | 0.48 | 0.15 | 0.74 |
| Content development | -1.00 | 0.25 | 0.89 | 0.11 | 1.89 |
| Online reputation management | -0.39 | -0.25 | 0.89 | 0.10 | 1.28 |
| Content marketing | -1.00 | 0.19 | 0.92 | 0.08 | 1.92 |
| Project management | -0.70 | 0.09 | 0.46 | 0.00 | 1.16 |
| User experience | -0.83 | -0.06 | 0.64 | -0.04 | 1.47 |
| Analytics | -1.09 | -0.09 | 0.74 | -0.10 | 1.83 |
| User research/testing | -1.17 | -0.34 | 0.14 | -0.41 | 1.32 |
| Personalization | -0.91 | -0.53 | 0.07 | -0.43 | 0.98 |
| CRM | -1.22 | -0.58 | 0.19 | -0.51 | 1.41 |
| Email or marketing automation | -1.30 | -0.69 | 0.25 | -0.54 | 1.55 |
| Mobile app development | -1.30 | -0.68 | 0.18 | -0.56 | 1.48 |

Values -2 to +2

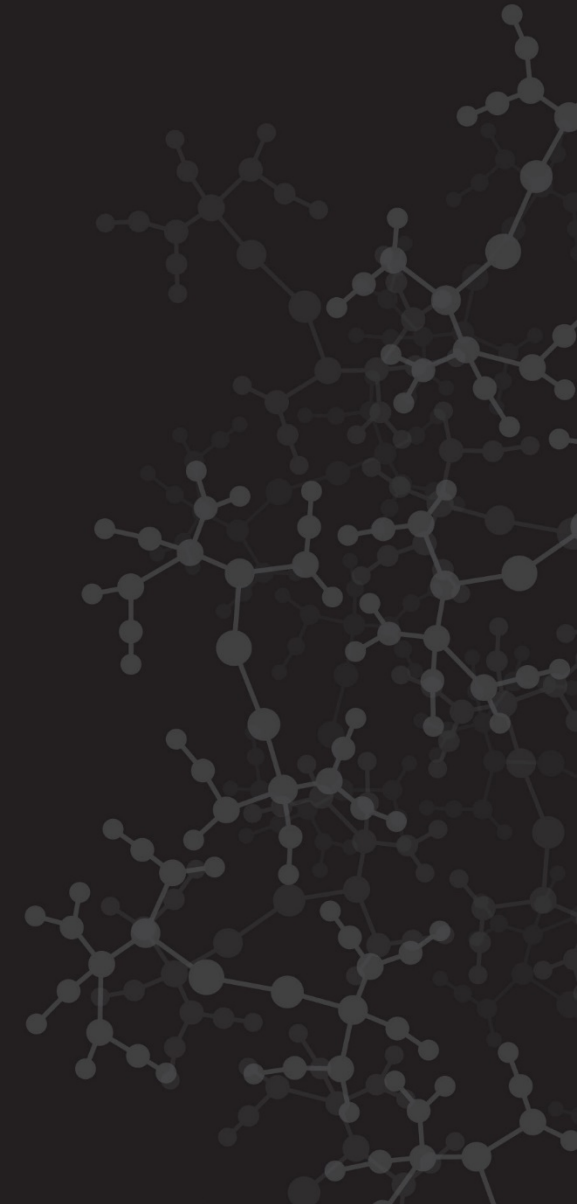
Where is healthcare furthest behind

Figures are priority order. Low numbers=high priority. Ties have the same priority value.

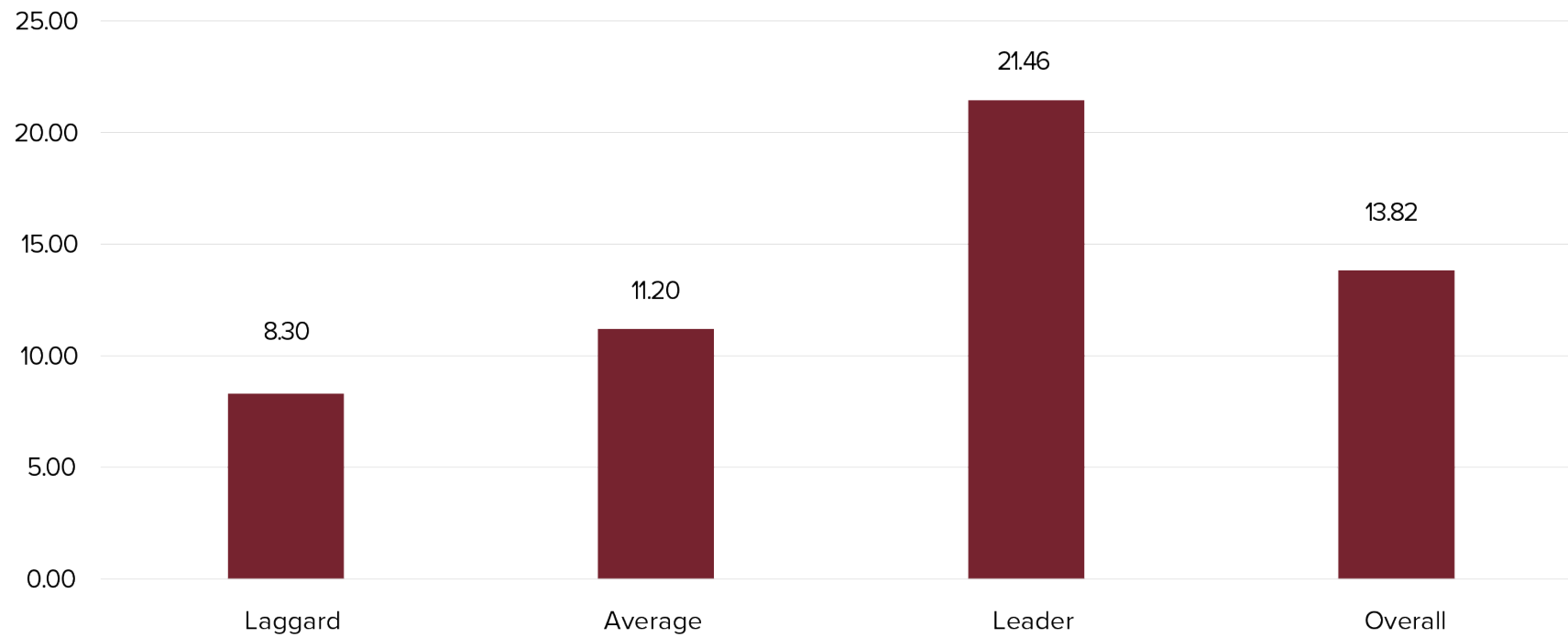
| | Provider (Order) | | Vendor (Order) | |
|---|------------------|--|----------------|---|
| Personalization | 1 | | 1 | Digital strategy |
| User experience | 2 | | 2 | User experience |
| CRM | 3 | | 3 | Personalization |
| Mobile app development | 4 | | 4 | Analytics |
| Email or marketing automation | 4 | | 4 | User research/testing |
| Analytics | 6 | | 4 | Content marketing |
| Online reputation management | 7 | | 7 | Video production |
| Digital strategy | 8 | | 8 | CRM |
| Content development | 9 | | 8 | Mobile app development |
| User research/testing | 10 | | 8 | Email or marketing automation |
| Content marketing | 11 | | 8 | Online reputation management |
| Web design | 11 | | 8 | Social media and community management |
| Digital advertising | 11 | | 13 | Content development |
| Video production | 14 | | 14 | Web accessibility |
| Web accessibility | 15 | | 14 | Web hosting |
| General website management | 15 | | 16 | Web development |
| Social media and community management | 17 | | 16 | Local search or business listing management |
| Web development | 17 | | 16 | Project management |
| Local search or business listing management | 17 | | 19 | Web design |
| Search engine optimization (SEO) | 17 | | 19 | General website management |
| Project management | 21 | | 19 | Search engine optimization (SEO) |
| Web hosting | 22 | | 22 | Digital advertising |



Digital marketing team size and structure



FTEs by Leader/Laggard



Average FTEs by Role and Leader/Laggard

| | Laggard | Average | Leader | Overall | L/L Delta | |
|---|---------|---------|--------|---------|-----------|---|
| Content development | 0.54 | 0.97 | 2.14 | 1.24 | 1.60 | ↑ |
| Project management | 0.70 | 0.62 | 2.07 | 1.14 | 1.37 | ↑ |
| Analytics | 0.36 | 0.62 | 1.81 | 0.95 | 1.45 | ↑ |
| Content marketing | 0.79 | 0.85 | 1.13 | 0.92 | 0.34 | |
| Social media and community management | 0.69 | 0.81 | 1.24 | 0.92 | 0.55 | |
| General website management | 0.51 | 0.72 | 1.35 | 0.87 | 0.85 | ↓ |
| Video production | 0.55 | 0.64 | 1.40 | 0.86 | 0.84 | |
| Digital advertising | 0.37 | 0.71 | 1.10 | 0.75 | 0.73 | |
| Digital strategy | 0.43 | 0.60 | 0.95 | 0.68 | 0.51 | |
| Local search or business listing management | 0.48 | 0.56 | 0.62 | 0.56 | 0.14 | |
| Online reputation management | 0.43 | 0.48 | 0.67 | 0.53 | 0.24 | |
| CRM | 0.37 | 0.41 | 0.73 | 0.51 | 0.36 | |
| Email or marketing automation | 0.40 | 0.48 | 0.61 | 0.50 | 0.20 | |
| Web development | 0.32 | 0.28 | 0.92 | 0.50 | 0.59 | |
| Web design | 0.28 | 0.43 | 0.75 | 0.49 | 0.47 | |
| User experience | 0.22 | 0.50 | 0.66 | 0.48 | 0.44 | |
| Search engine optimization | 0.27 | 0.41 | 0.71 | 0.47 | 0.43 | |
| Web accessibility | 0.24 | 0.24 | 0.75 | 0.40 | 0.51 | |
| Mobile app development | 0.04 | 0.21 | 0.68 | 0.32 | 0.63 | |
| Personalization | 0.07 | 0.26 | 0.50 | 0.29 | 0.43 | |
| User research / testing | 0.09 | 0.24 | 0.46 | 0.27 | 0.37 | |
| Web hosting | 0.13 | 0.18 | 0.23 | 0.18 | 0.10 | |
| Total: | 8.30 | 11.20 | 21.46 | 13.82 | | |

Outsourcing by Leader/Laggard

| | Laggard | Average | Leader | Overall | L/L Delta |
|---|---------|---------|--------|---------|-----------|
| Social media and community management | 0.52 | 0.55 | 0.62 | 0.57 | 0.10 |
| Project management | 0.86 | 0.61 | 0.76 | 0.73 | -0.10 |
| Personalization | 1.11 | 1.04 | 1.00 | 1.04 | -0.11 |
| Email or marketing automation | 1.23 | 1.03 | 1.30 | 1.19 | 0.07 |
| Content marketing | 1.38 | 1.06 | 1.41 | 1.27 | 0.03 |
| Content development | 1.38 | 1.19 | 1.37 | 1.30 | -0.01 |
| Mobile app development | 1.05 | 1.42 | 1.48 | 1.33 | 0.43 |
| User experience | 1.32 | 1.46 | 1.22 | 1.33 | -0.09 |
| CRM | 0.95 | 1.33 | 1.65 | 1.35 | 0.71 |
| User research/testing | 1.42 | 1.72 | 1.20 | 1.45 | -0.22 |
| General website management | 1.90 | 1.34 | 1.28 | 1.46 | -0.62 |
| Digital strategy | 1.95 | 1.34 | 1.46 | 1.54 | -0.49 |
| Analytics | 1.35 | 1.73 | 1.66 | 1.61 | 0.31 |
| Video production | 1.50 | 1.87 | 1.41 | 1.61 | -0.09 |
| Online reputation management | 1.90 | 1.44 | 1.64 | 1.64 | -0.26 |
| Web accessibility | 2.20 | 1.46 | 1.56 | 1.70 | -0.64 |
| Search engine optimization (SEO) | 1.77 | 1.63 | 1.77 | 1.72 | -0.01 |
| Local search or business listing management | 1.90 | 1.77 | 1.79 | 1.81 | -0.12 |
| Web design | 2.52 | 1.80 | 1.86 | 2.01 | -0.67 |
| Digital advertising | 2.33 | 1.85 | 2.00 | 2.02 | -0.33 |
| Web development | 2.43 | 2.32 | 1.92 | 2.21 | -0.51 |
| Web hosting | 3.00 | 3.04 | 2.96 | 3.00 | -0.04 |

Higher score = more outsourcing, Range =0 to 4

Outsourcing Trends

| In the coming year, we plan to... | Laggard | Average | Leader | Overall |
|--|---------|---------|--------|---------|
| Do a greater portion of our digital marketing work in-house. | 18% | 22% | 20% | 20% |
| Keep our current balance of in-sourcing and outsourcing. | 36% | 66% | 68% | 58% |
| Do a greater portion of our digital marketing work through agency/vendor partners. | 45% | 13% | 12% | 22% |

Top Three Areas for Staffing Investments

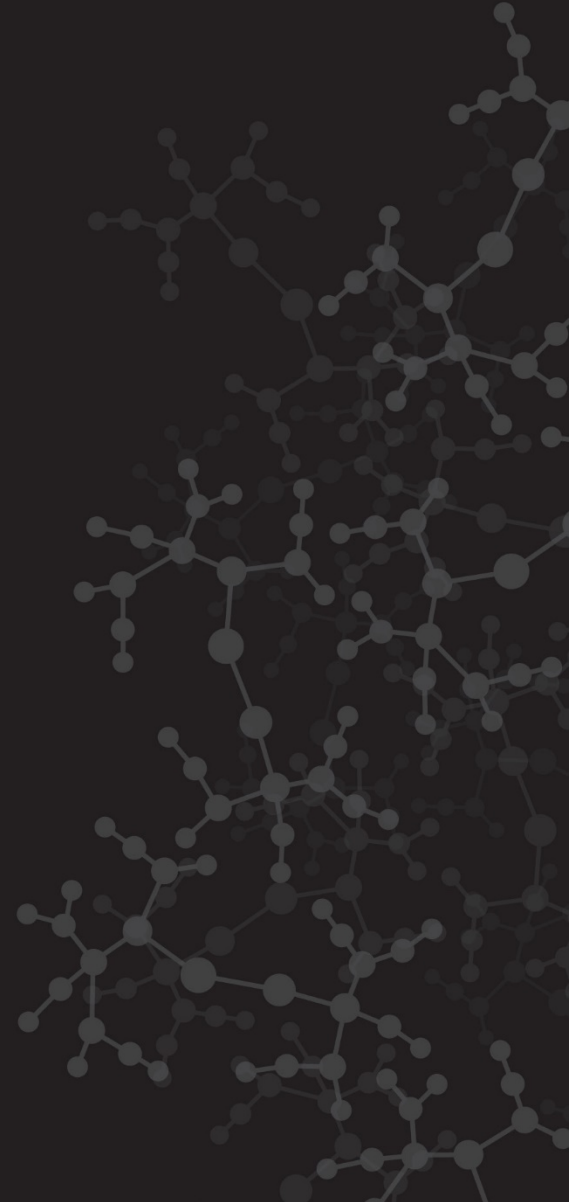


Agency Perspective: Level of Client Investment





Budgets and expectations



| Overall marketing budget expectations for the coming year | | | | |
|---|---------|---------|--------|---------|
| | Laggard | Average | Leader | Overall |
| Increase | 68.42% | 46.15% | 29.17% | 46.38% |
| Remain the same | 26.32% | 53.85% | 66.67% | 50.72% |
| Decrease | 5.26% | 0.00% | 4.17% | 2.90% |

| Digital marketing budget expectations for this coming year | | | | |
|--|---------|---------|--------|---------|
| | Laggard | Average | Leader | Overall |
| Increase | 61.90% | 37.93% | 41.67% | 45.95% |
| Remain the same | 28.57% | 51.72% | 50.00% | 44.59% |
| Decrease | 4.76% | 0.00% | 8.33% | 4.05% |

| Overall marketing budget compared to before the pandemic | | | | |
|--|---------|---------|--------|---------|
| | Laggard | Average | Leader | Overall |
| Higher than before the pandemic | 33.33% | 20.69% | 19.05% | 23.94% |
| About the same as before the pandemic | 47.62% | 55.17% | 66.67% | 56.34% |
| Lower than before the pandemic | 19.05% | 24.14% | 14.29% | 19.72% |

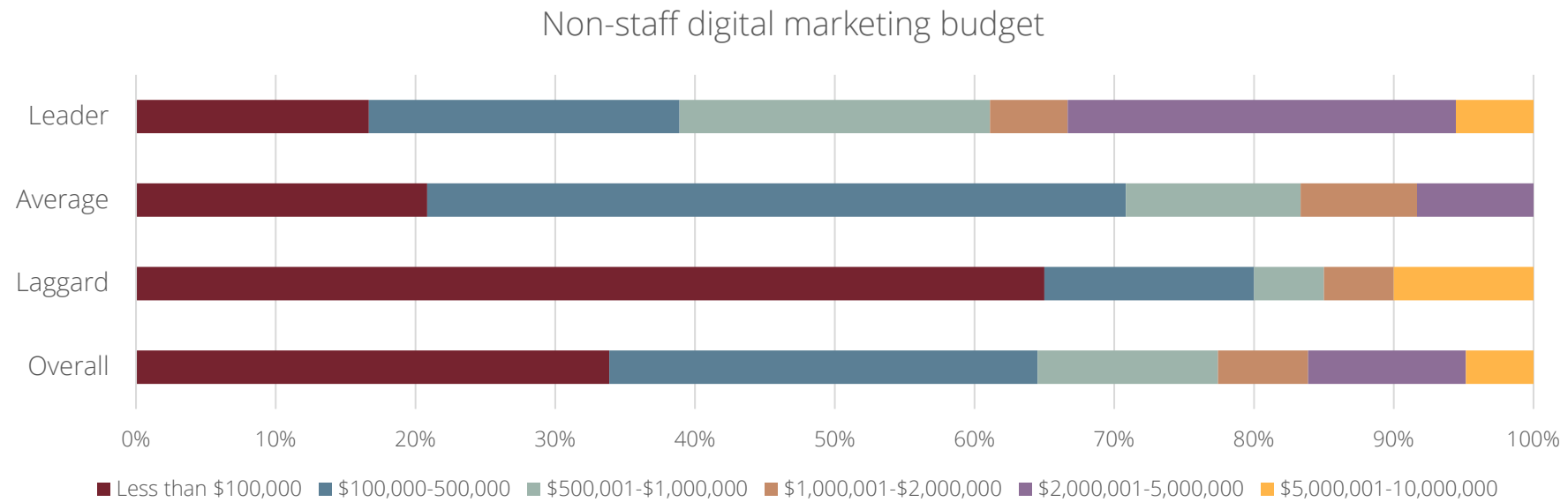
| Digital marketing budget compared to before the pandemic | | | | |
|--|---------|---------|--------|---------|
| | Laggard | Average | Leader | Overall |
| Higher than before the pandemic | 42.86% | 37.04% | 12.00% | 30.14% |
| About the same as before the pandemic | 42.86% | 51.85% | 72.00% | 56.16% |
| Lower than before the pandemic | 14.29% | 11.11% | 16.00% | 13.70% |

The shift of marketing investment from traditional to digital is continuing...

| | Laggard | Average | Leader | Overall |
|---------------------------------|---------|---------|--------|---------|
| Faster than in the past | 52.38% | 39.29% | 36.00% | 41.89% |
| At the same pace as in the past | 33.33% | 60.71% | 56.00% | 51.35% |
| More slowly than in the past | 14.29% | 0.00% | 8.00% | 6.76% |

| Average percent of overall marketing budget dedicated | |
|---|-------|
| Leader | 32.26 |
| Average | 38.21 |
| Laggard | 30.53 |
| Overall | 34.29 |

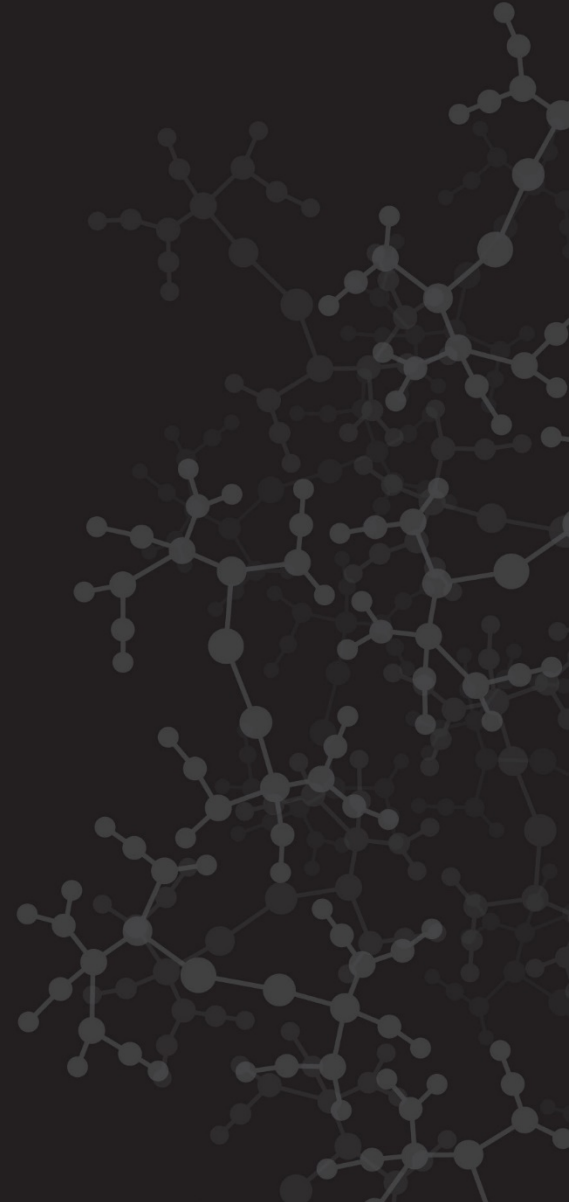
| Digital budget does not come from marketing | |
|---|--------|
| Leader | 29.63% |
| Average | 12.50% |
| Laggard | 17.39% |
| Overall | 19.51% |



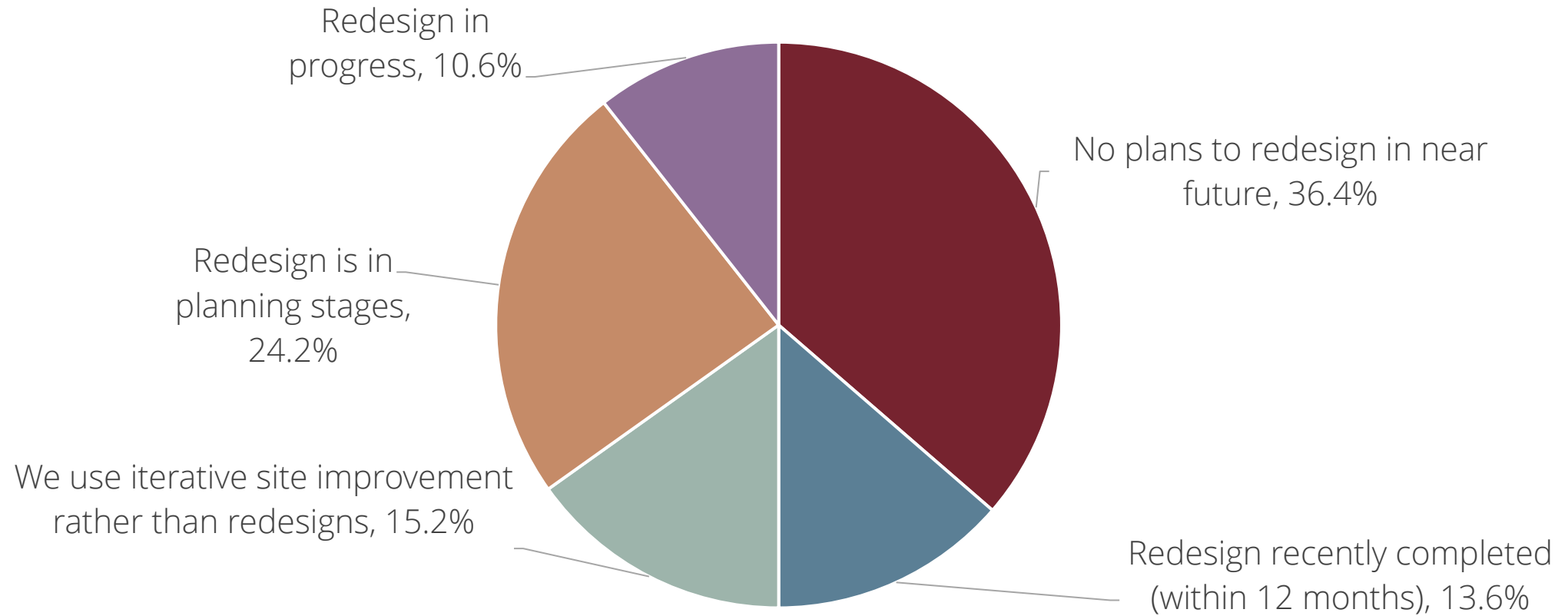
| | Average Non-Staff Digital Marketing Budget | Average of Investment per bed |
|---------|--|-------------------------------|
| Leader | 1,713,888.89 | 1797.34 |
| Average | 670,833.33 | 2090.50 |
| Laggard | 940,000.00 | 1609.95 |
| Overall | 1,060,483.87 | 1852.35 |



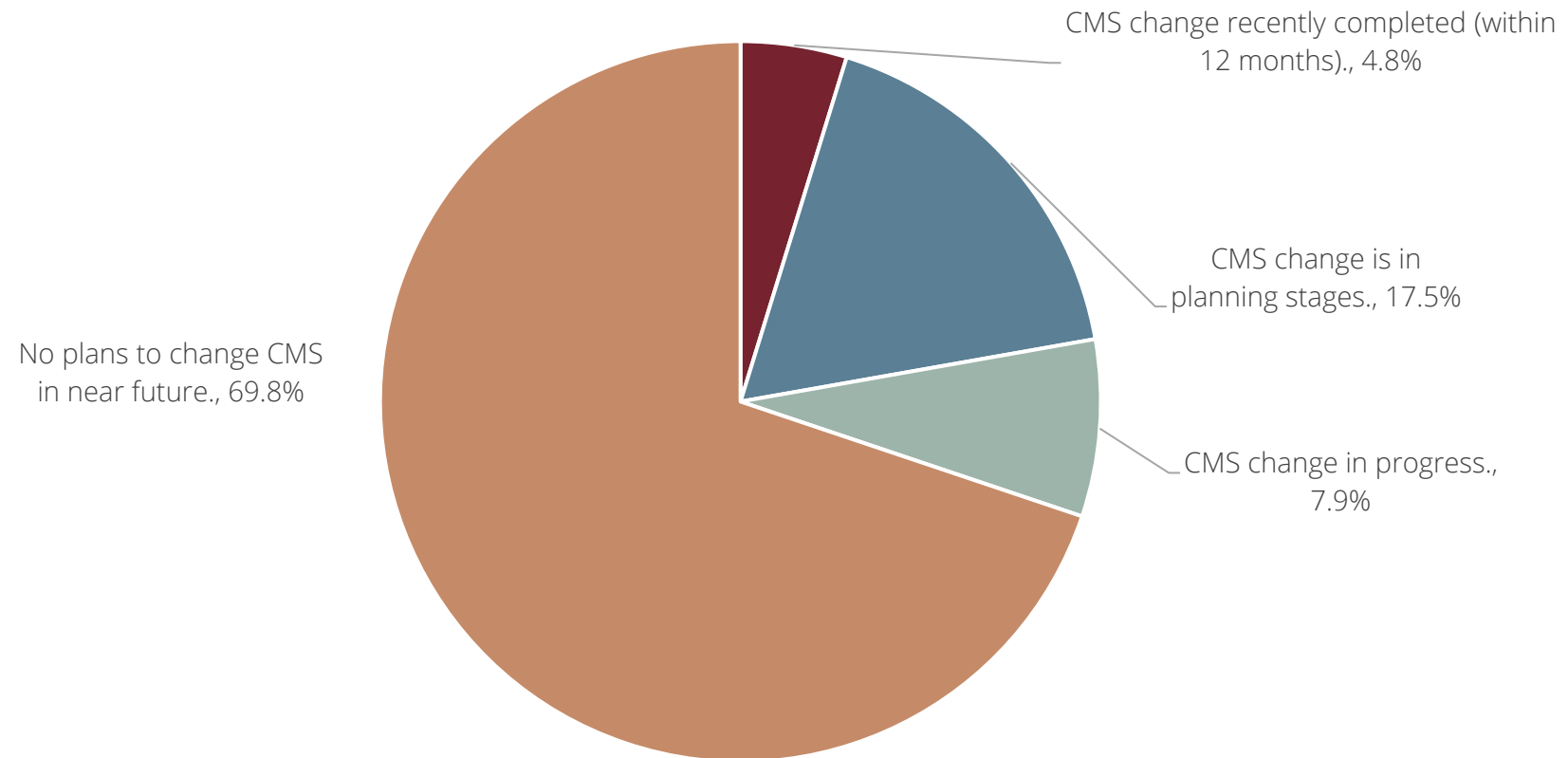
Redesigns and Replatforming



Redesign Plans



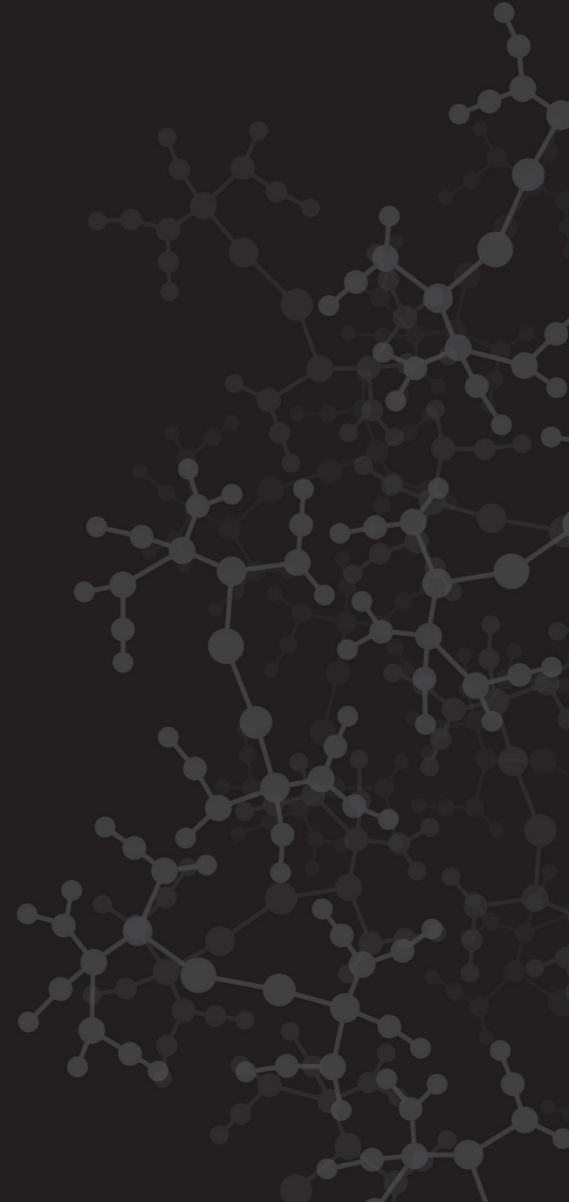
CMS Change Plans



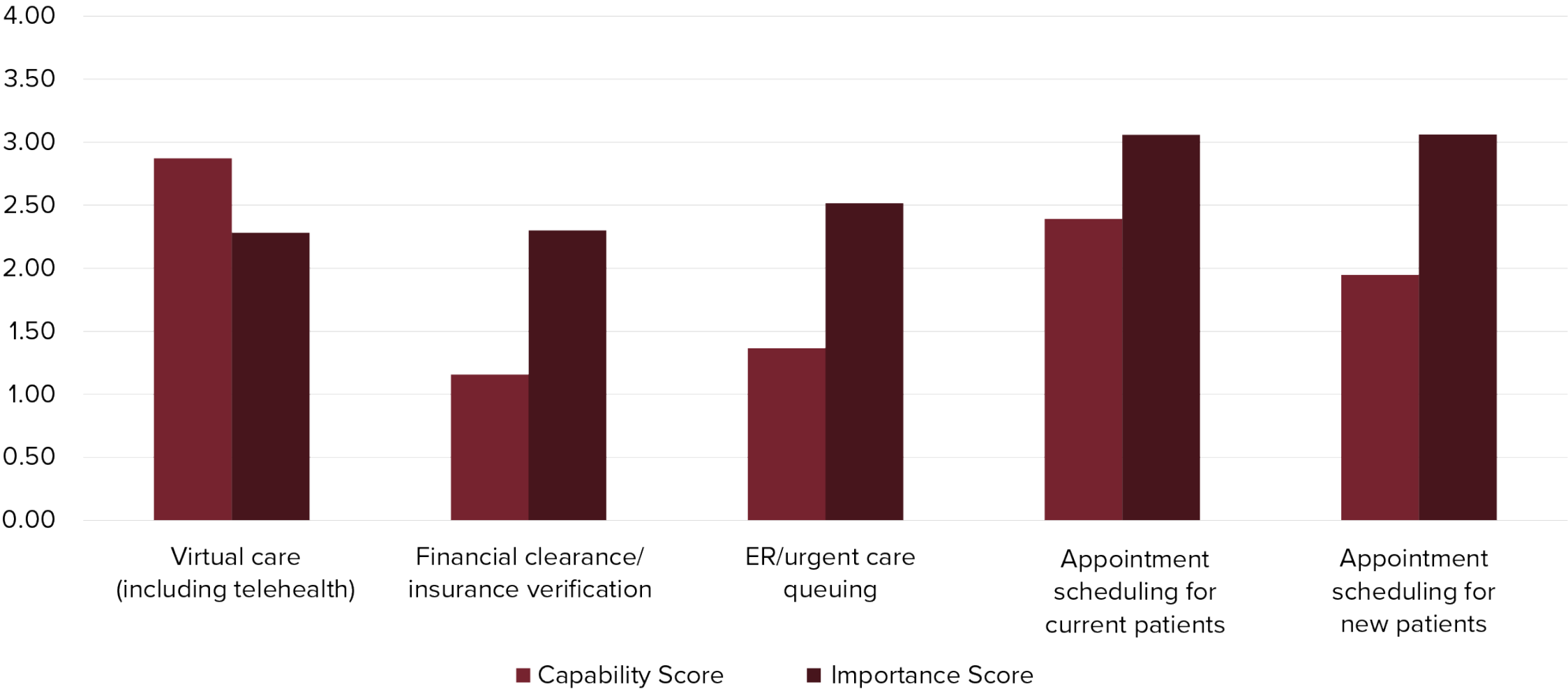
| Planned Redesign vs. Planned CMS Change | | | | | |
|---|-------------------------------------|-----------------------------|-----------------------------------|--------------------------------|----------------------|
| | No plans to redesign in near future | Redesign recently completed | We use iterative site improvement | Redesign is in planning stages | Redesign in progress |
| No plans to change CMS in near future | 100% | 44% | 88% | 36% | 43% |
| CMS change recently completed | 0% | 33% | 0% | 0% | 0% |
| CMS change is in planning stages | 0% | 22% | 0% | 57% | 14% |
| CMS change in progress | 0% | 0% | 13% | 7% | 43% |



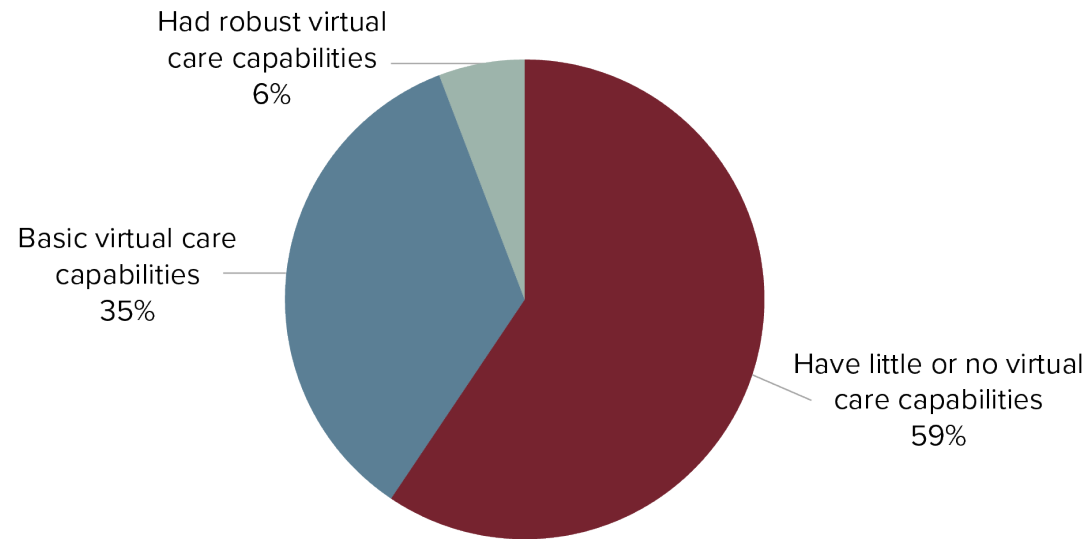
Digital Front Door



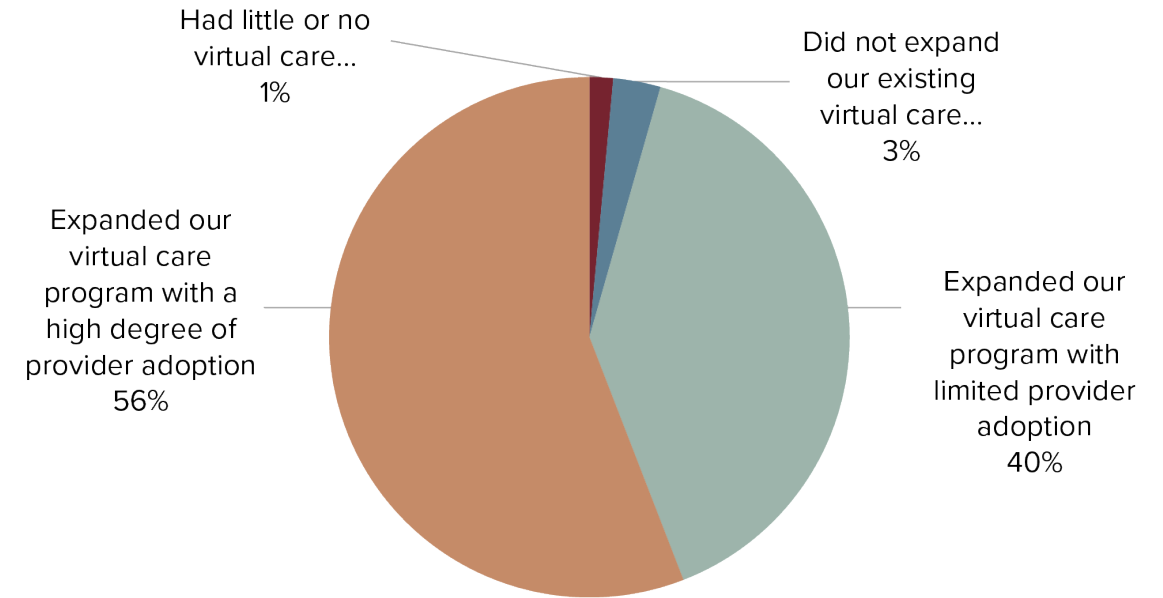
Digital Front Door - Care Access (Scale 1-4)



Before the pandemic, our organization had...



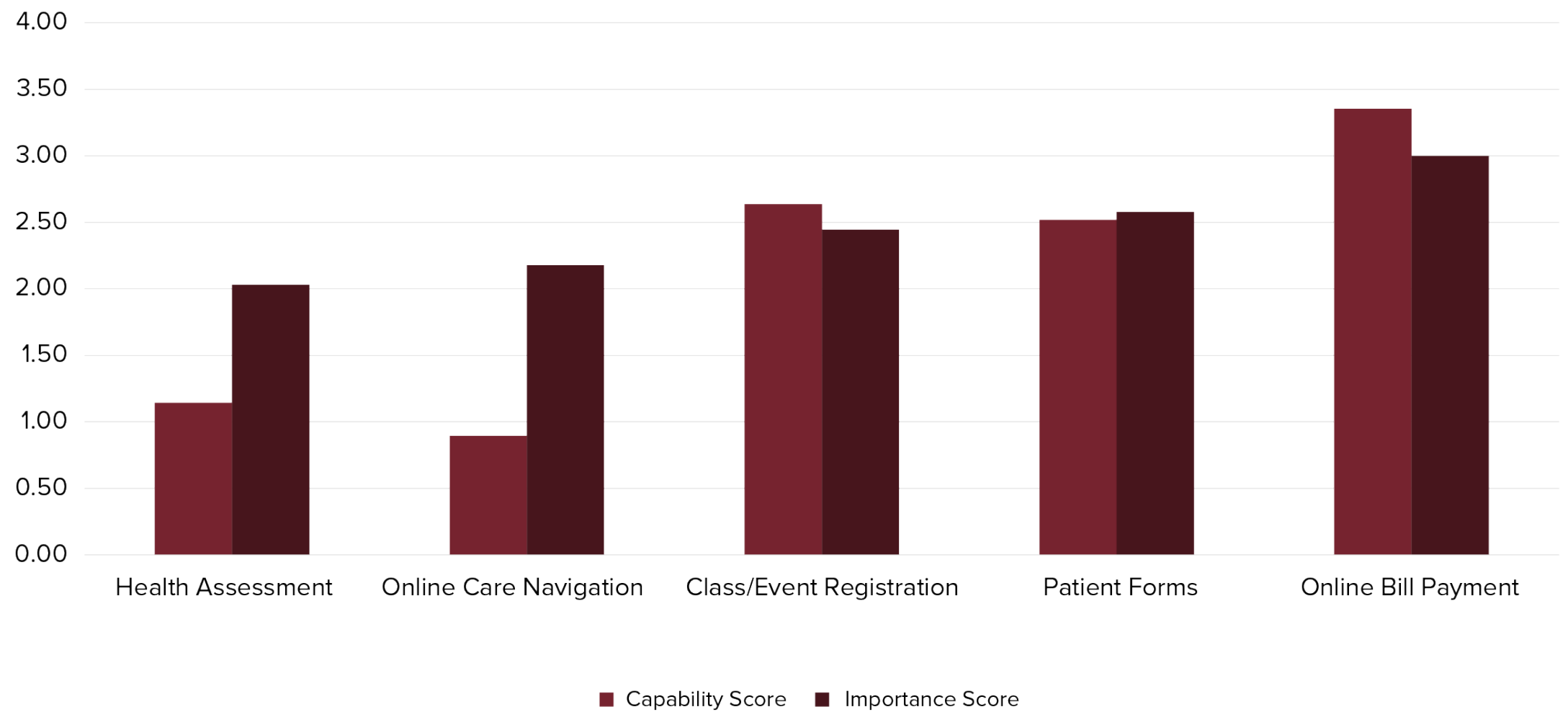
During the pandemic, our organization...

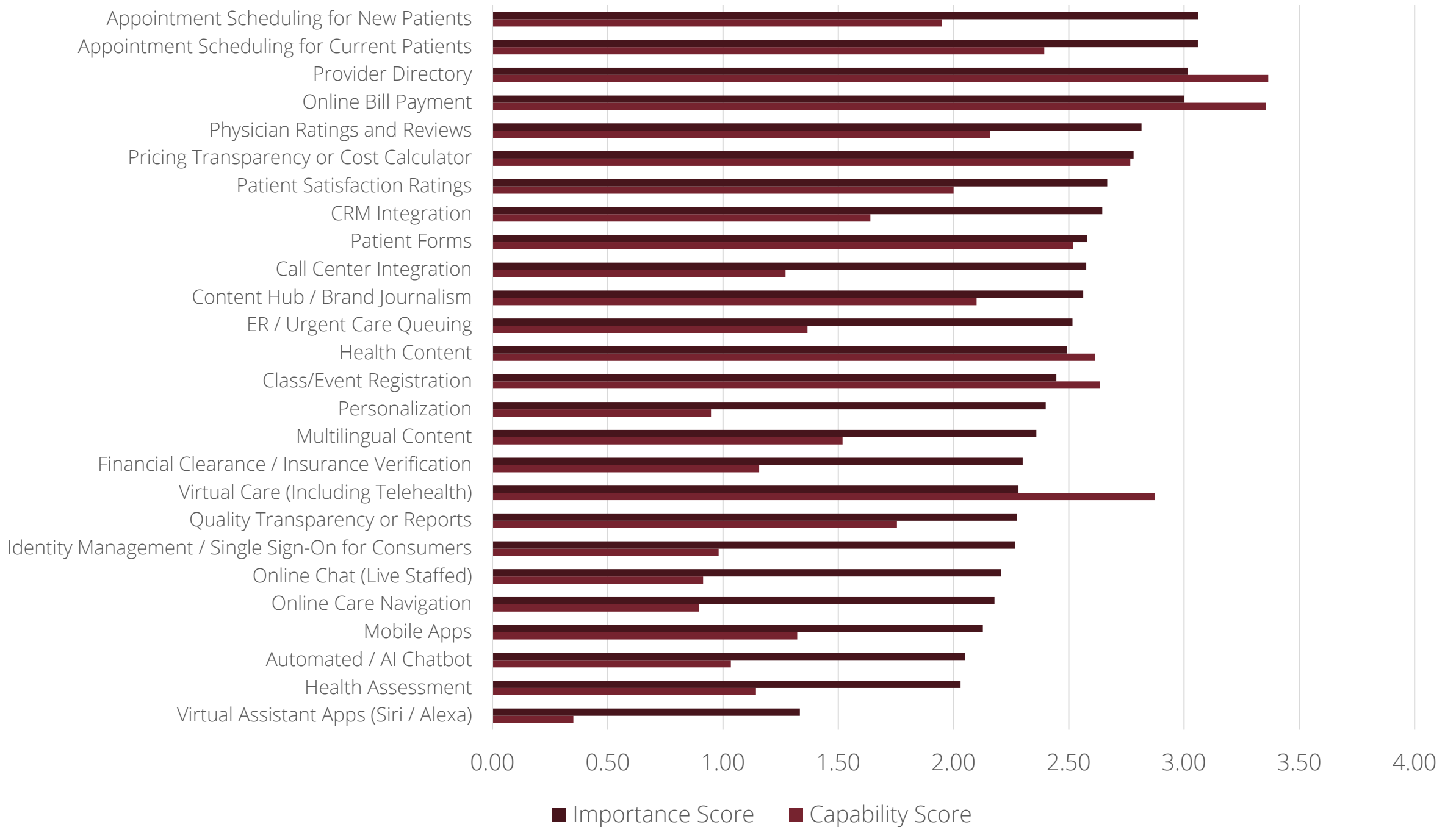


Virtual Care Pre-Pandemic vs. Now

| | | Before the Pandemic | | | |
|---------------------|--|---|--------------------------------------|---------------------------------------|---------|
| | | had little or no virtual care capabilities. | had basic virtual care capabilities. | had robust virtual care capabilities. | Overall |
| During the Pandemic | had little or no virtual care capabilities. | 2% | 0% | 0% | 1% |
| | did not expand our existing virtual care program. | 2% | 4% | 0% | 3% |
| | expanded our virtual care program with limited provider adoption. | 49% | 21% | 67% | 40% |
| | expanded our virtual care program with a high degree of provider adoption. | 46% | 75% | 33% | 56% |

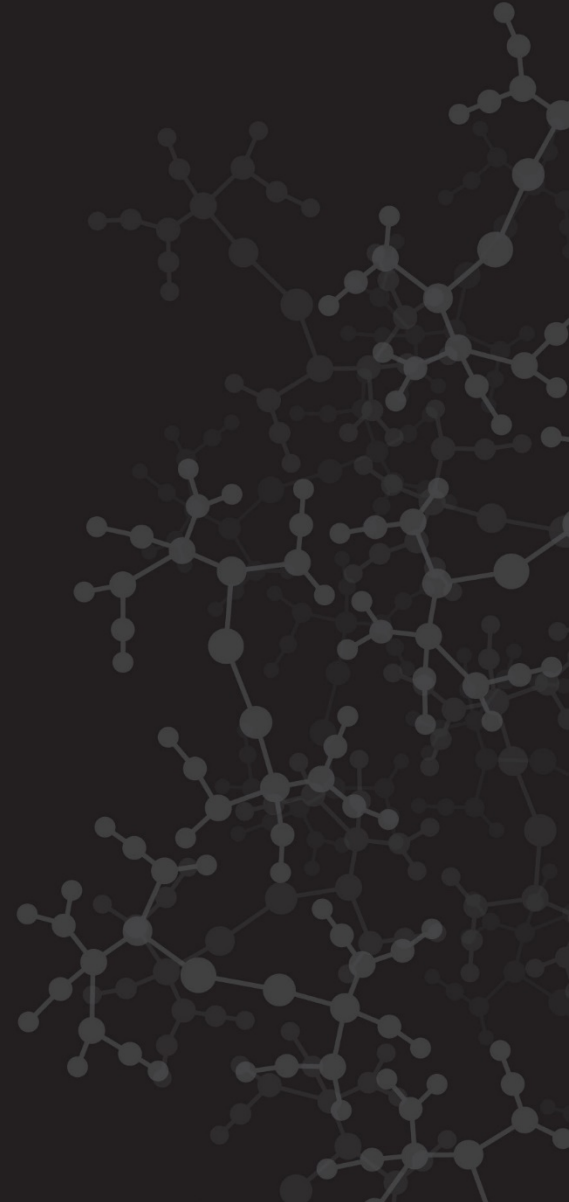
Digital Front Door — Conversion/Assessment/Triage (Scale 1-4)



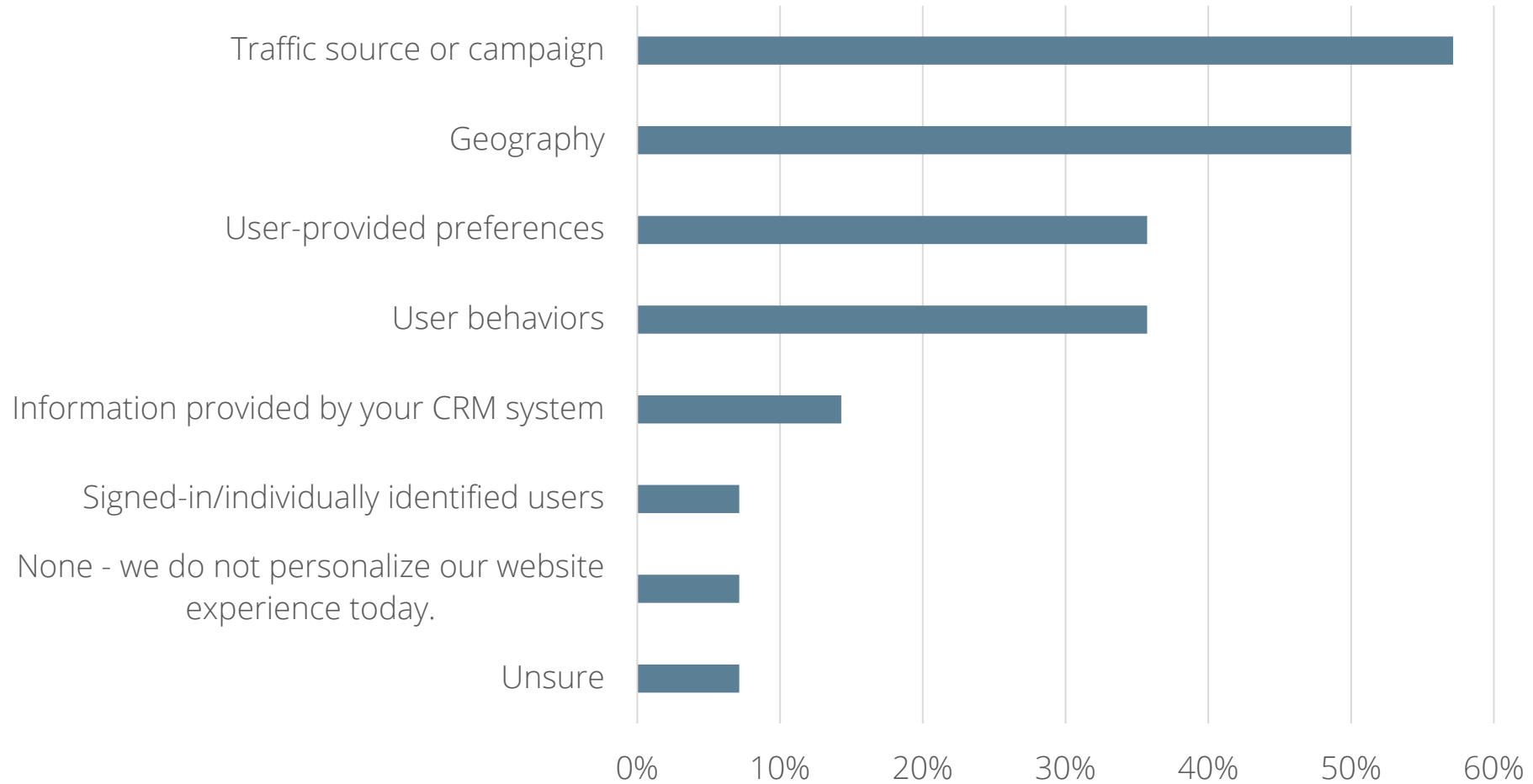




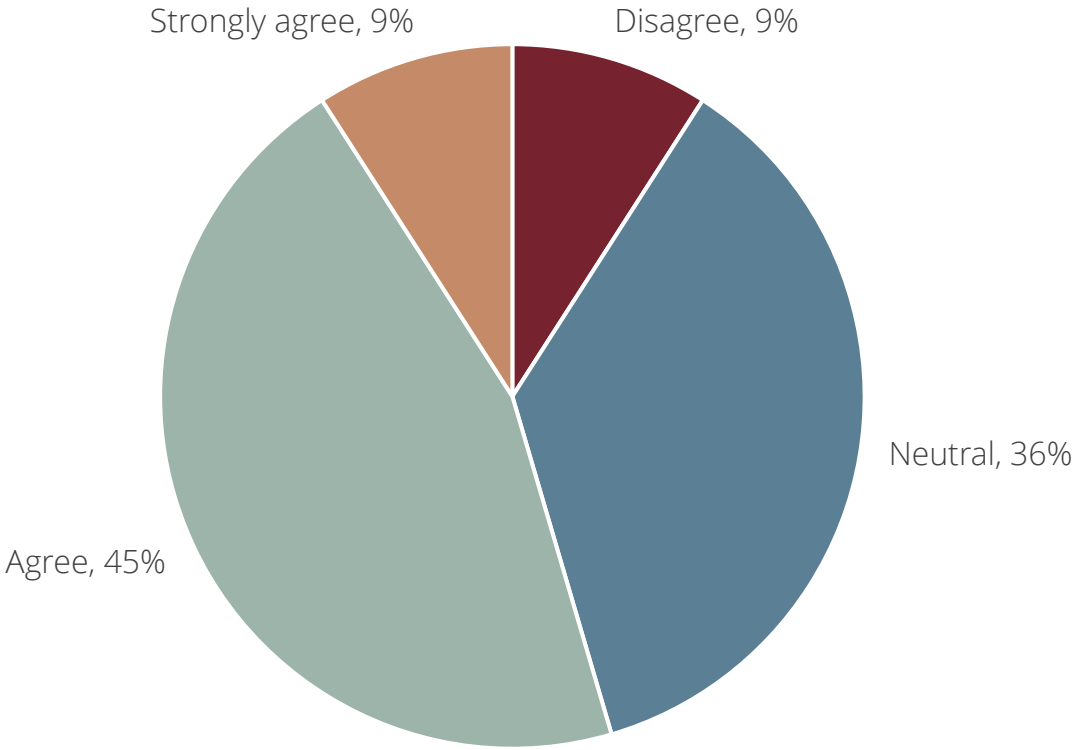
Personalization



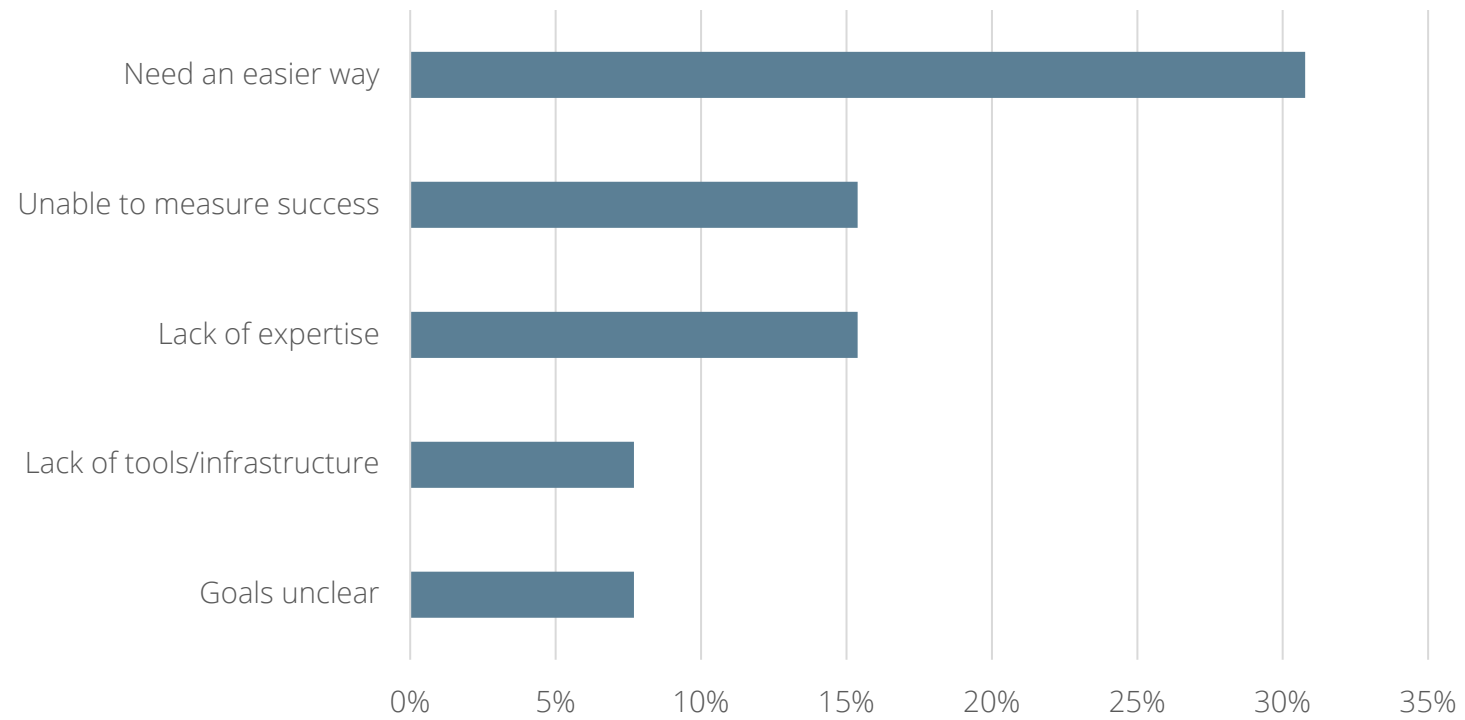
Personalization Methods Used



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

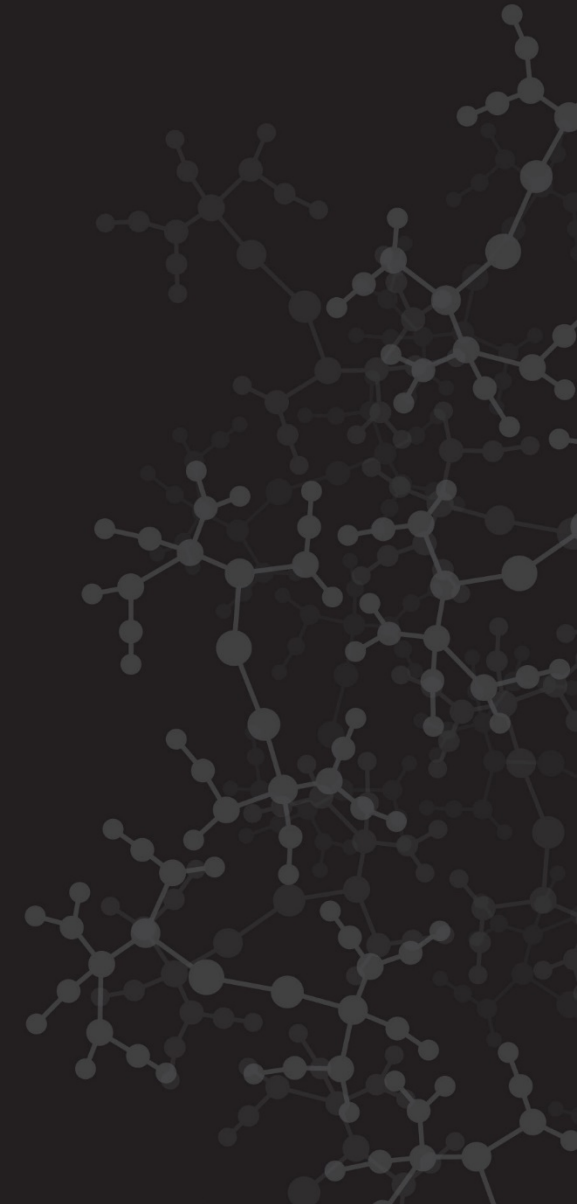


Barriers to Personalization





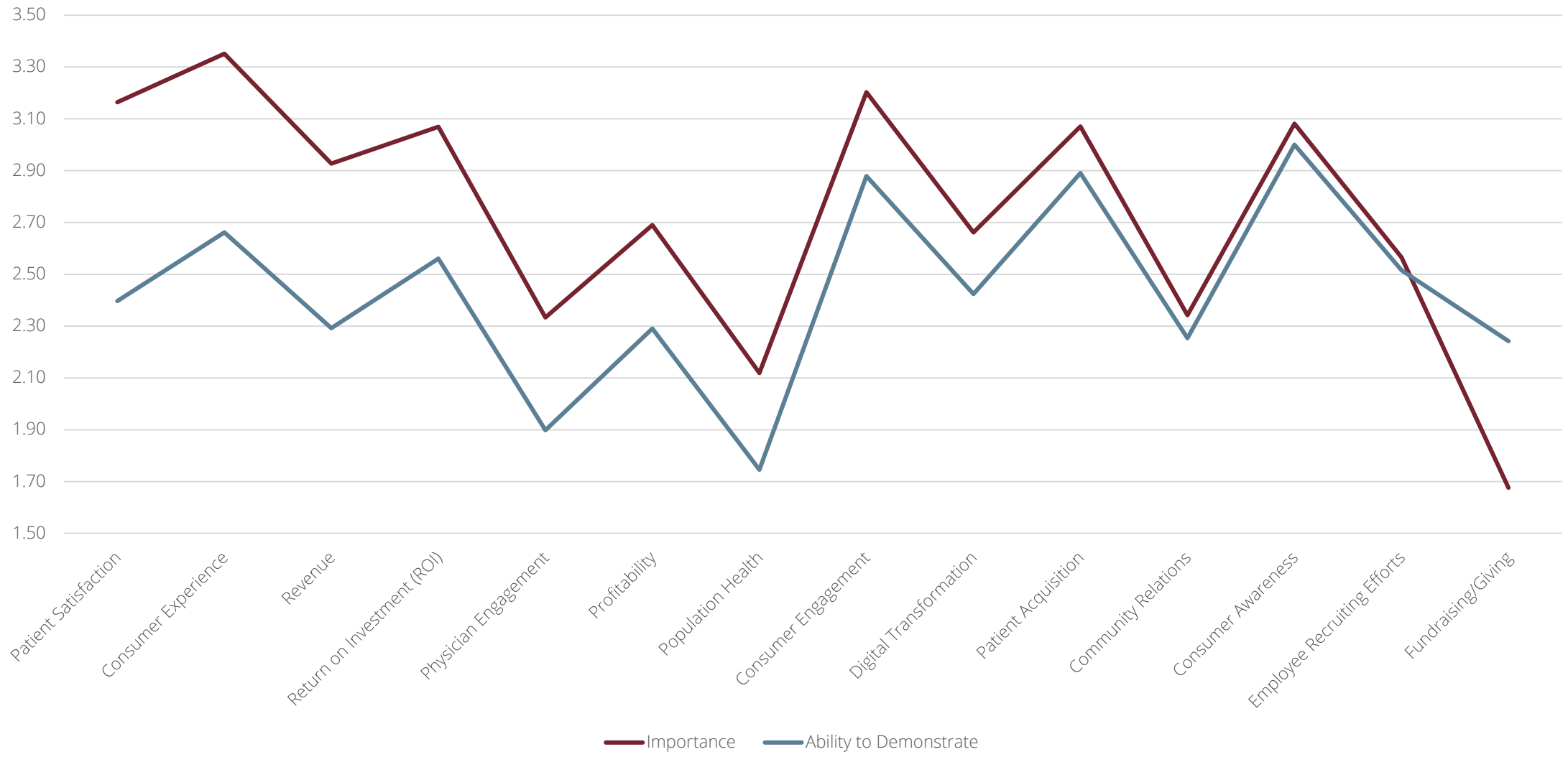
Goals and barriers



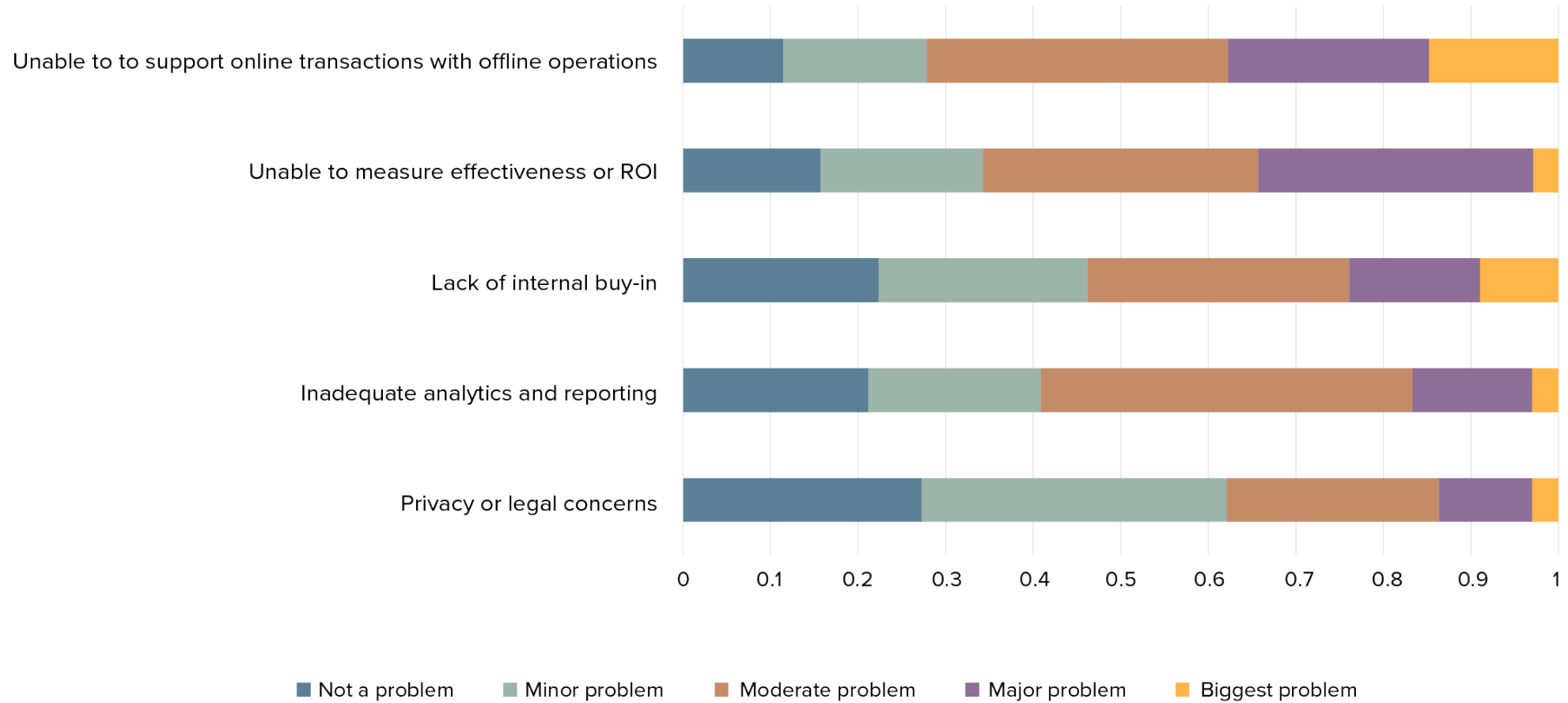
| Goals: Importance | |
|-----------------------------|--------|
| | Scored |
| Consumer experience | 3.35 |
| Consumer engagement | 3.20 |
| Patient satisfaction | 3.16 |
| Consumer awareness | 3.08 |
| Patient acquisition | 3.07 |
| Return on investment (ROI) | 3.07 |
| Revenue | 2.93 |
| Profitability | 2.69 |
| Digital transformation | 2.66 |
| Employee recruiting efforts | 2.57 |
| Community relations | 2.34 |
| Physician engagement | 2.33 |
| Population health | 2.12 |
| Fundraising/giving | 1.68 |

| Goals: Ability to Demonstrate | |
|-------------------------------|--------|
| | Scored |
| Consumer awareness | 3.00 |
| Patient acquisition | 2.89 |
| Consumer engagement | 2.88 |
| Consumer experience | 2.66 |
| Return on investment (ROI) | 2.56 |
| Employee recruiting efforts | 2.52 |
| Digital transformation | 2.42 |
| Patient satisfaction | 2.40 |
| Revenue | 2.29 |
| Profitability | 2.29 |
| Community relations | 2.25 |
| Fundraising/giving | 2.24 |
| Position engagement | 1.90 |
| Population health | 1.75 |

Goals: Importance vs. Ability to Demonstrate



Barriers to Digital Marketing Success



| Barriers to Tracking ROI | | | | |
|--|--------|---------|---------|---------|
| | Leader | Average | Laggard | Overall |
| Lack of tools/infrastructure | 80% | 58% | 90% | 74% |
| Lack of expertise | 20% | 50% | 70% | 52% |
| No formal justification required (no one's asking) | 0% | 33% | 50% | 33% |
| Need an easier way | 20% | 17% | 10% | 15% |
| Too time-consuming | 20% | 17% | 10% | 15% |
| We can measure ROI but it's not positive/improving | 0% | 8% | 0% | 4% |

Importance of Marketing Channels (Score: 0 to 3)

| | Leader | Average | Laggard | Overall |
|---|--------|---------|---------|---------|
| Website | 2.26 | 2.19 | 2.29 | 2.24 |
| Search (Organic) | 2.32 | 2.23 | 2.11 | 2.23 |
| Content Marketing | 2.22 | 2.26 | 1.94 | 2.16 |
| Paid Search (i.e. Google Ads, Bing Ads) | 2.13 | 2.11 | 1.75 | 2.03 |
| Facebook (Organic) | 2.09 | 2.00 | 1.94 | 2.01 |
| Facebook Ads | 2.00 | 2.00 | 1.71 | 1.93 |
| Display Ads | 1.91 | 1.88 | 1.47 | 1.79 |
| Email / Marketing Automation | 1.65 | 1.73 | 2.00 | 1.78 |
| YouTube (Organic) | 1.78 | 1.88 | 1.50 | 1.75 |
| LinkedIn (Organic) | 1.83 | 1.48 | 1.50 | 1.60 |
| Instagram (Organic) | 1.70 | 1.44 | 1.65 | 1.58 |
| SMS/Text messaging | 1.77 | 1.12 | 1.65 | 1.48 |
| Instagram Ads | 1.61 | 1.46 | 1.24 | 1.45 |
| Video Ads | 1.65 | 1.50 | 1.12 | 1.45 |
| Twitter (Organic) | 1.48 | 1.40 | 1.22 | 1.38 |
| Over the Top (OTT) / Connected TV (CTV) | 1.45 | 1.39 | 0.94 | 1.29 |
| LinkedIn Ads | 1.00 | 1.31 | 1.00 | 1.12 |
| Audio Ads | 1.32 | 1.15 | 0.75 | 1.11 |
| Podcasts | 0.73 | 1.00 | 0.81 | 0.86 |
| Hyperlocal social media (i.e. NextDoor) | 0.94 | 0.77 | 0.42 | 0.75 |
| Specialty medical social media (i.e. Sermo, Doximity) | 0.68 | 0.67 | 0.53 | 0.64 |
| Twitter Ads | 0.55 | 0.52 | 0.50 | 0.52 |
| TikTok (Organic) | 0.61 | 0.32 | 0.31 | 0.42 |
| SnapChat (Organic) | 0.52 | 0.36 | 0.33 | 0.41 |
| SnapChat Ads | 0.41 | 0.20 | 0.20 | 0.27 |
| TikTok Ads | 0.41 | 0.12 | 0.20 | 0.24 |

| | Leader | Average | Laggard | Overall |
|---|--------|---------|---------|---------|
| Display Ads | 1.91 | 1.88 | 1.47 | 1.79 |
| Facebook (Organic) | 2.09 | 2.00 | 1.94 | 2.01 |
| Facebook Ads | 2.00 | 2.00 | 1.71 | 1.93 |
| Instagram (Organic) | 1.70 | 1.44 | 1.65 | 1.58 |
| Instagram Ads | 1.61 | 1.46 | 1.24 | 1.45 |
| LinkedIn (Organic) | 1.83 | 1.48 | 1.50 | 1.60 |
| LinkedIn Ads | 1.00 | 1.31 | 1.00 | 1.12 |
| Search (Organic) | 2.32 | 2.23 | 2.11 | 2.23 |
| Paid Search (i.e. Google Ads, Bing Ads) | 2.13 | 2.11 | 1.75 | 2.03 |
| SnapChat (Organic) | 0.52 | 0.36 | 0.33 | 0.41 |
| SnapChat Ads | 0.41 | 0.20 | 0.20 | 0.27 |
| TikTok (Organic) | 0.61 | 0.32 | 0.31 | 0.42 |
| TikTok Ads | 0.41 | 0.12 | 0.20 | 0.24 |
| Twitter (Organic) | 1.48 | 1.40 | 1.22 | 1.38 |
| Twitter Ads | 0.55 | 0.52 | 0.50 | 0.52 |
| YouTube (Organic) | 1.78 | 1.88 | 1.50 | 1.75 |
| Video Ads | 1.65 | 1.50 | 1.12 | 1.45 |



Questions?

eBook

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