

Industry Trends from Geonetric's 2018 Healthcare Digital Marketing Survey

GEONETRIC®

Survey Methodology

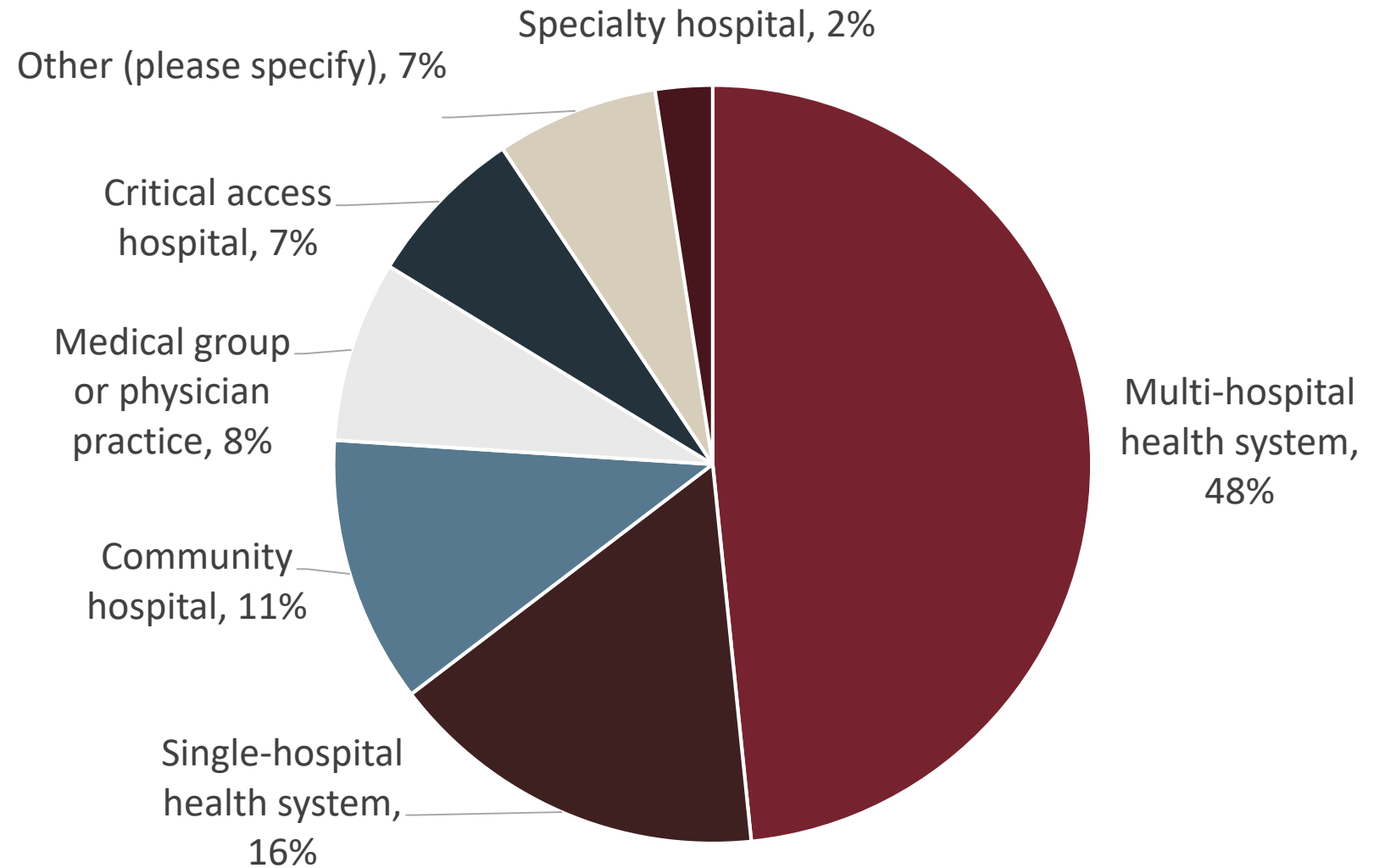
- Data Collection
- Partnership with *eHealthcare Strategy & Trends*
- Peer groups & segmentation
- Outside coding
- Insight-centered presentation

Organization Type [Providers Only]

Responses

Providers 246

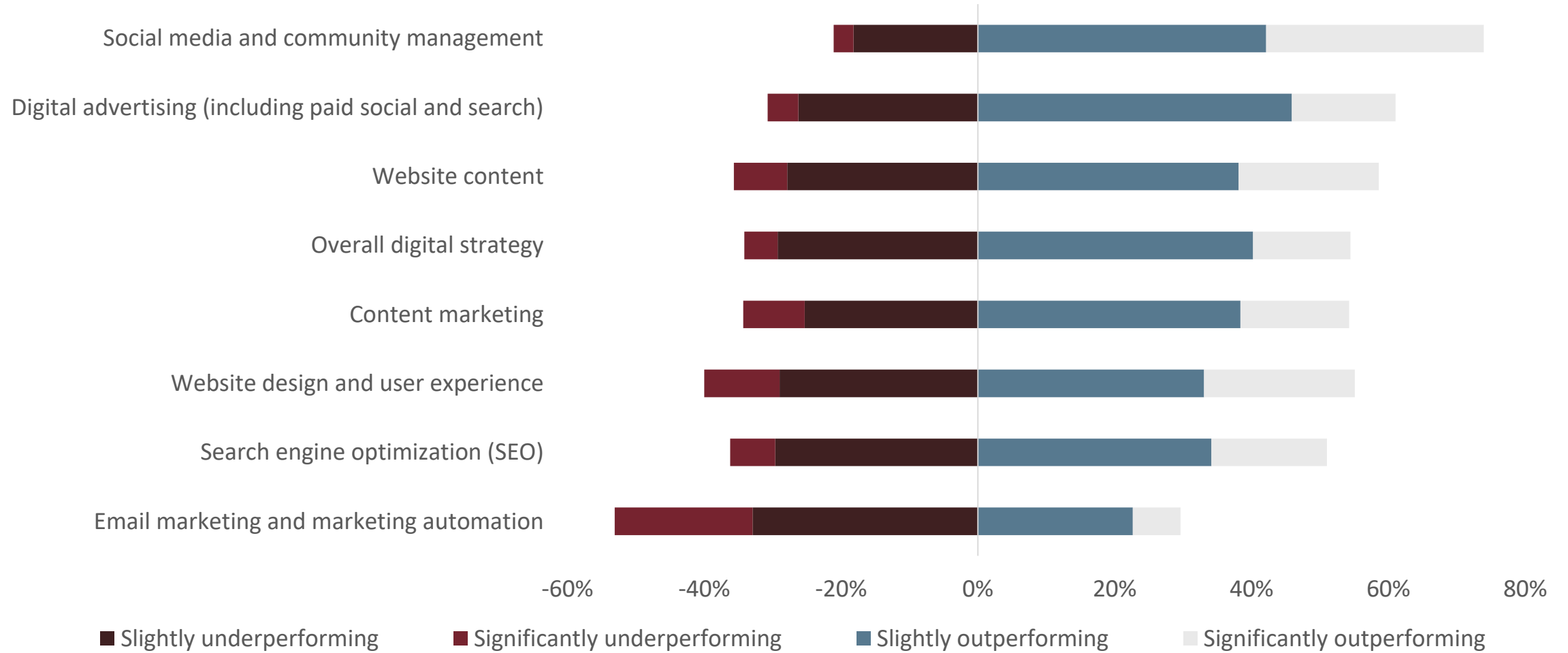
Vendors 47



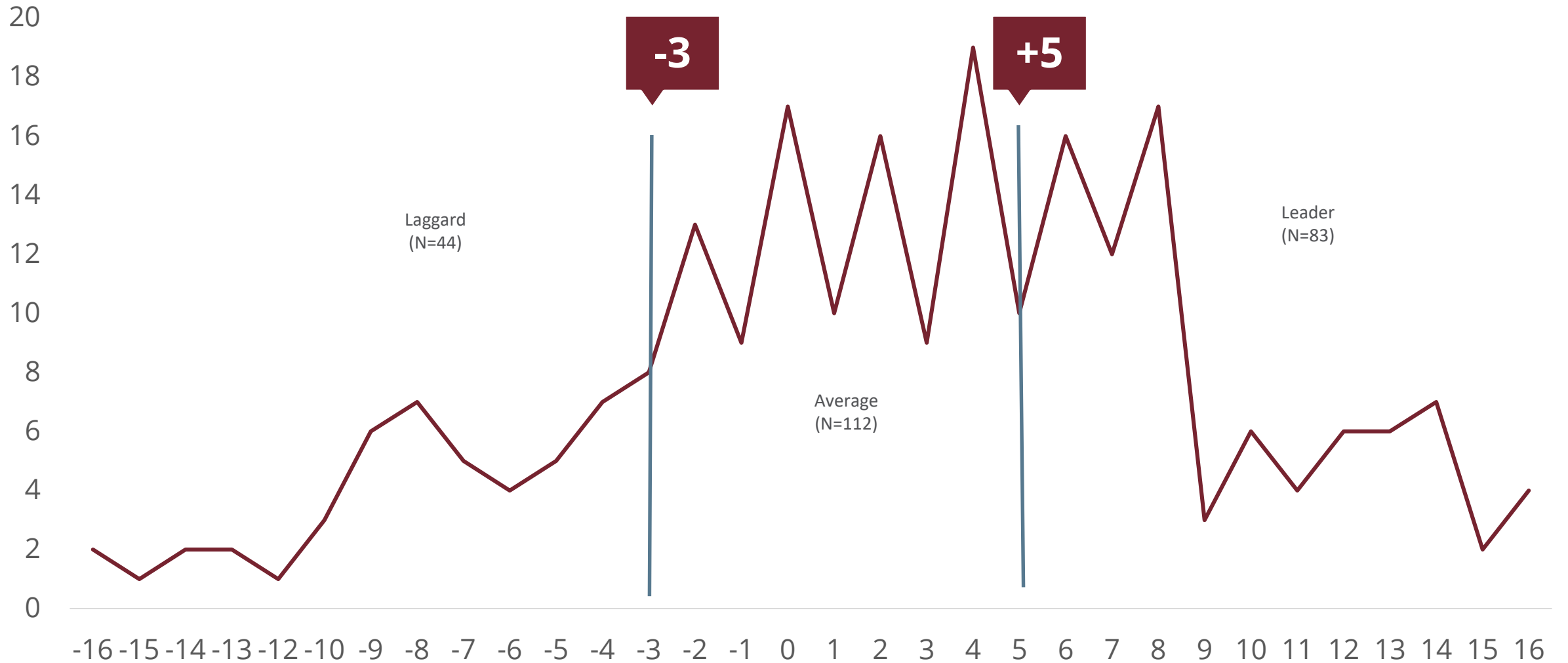


Content is Hard
The Struggle Is Real

Ahead/Behind - Overall



Leader/laggard score distribution



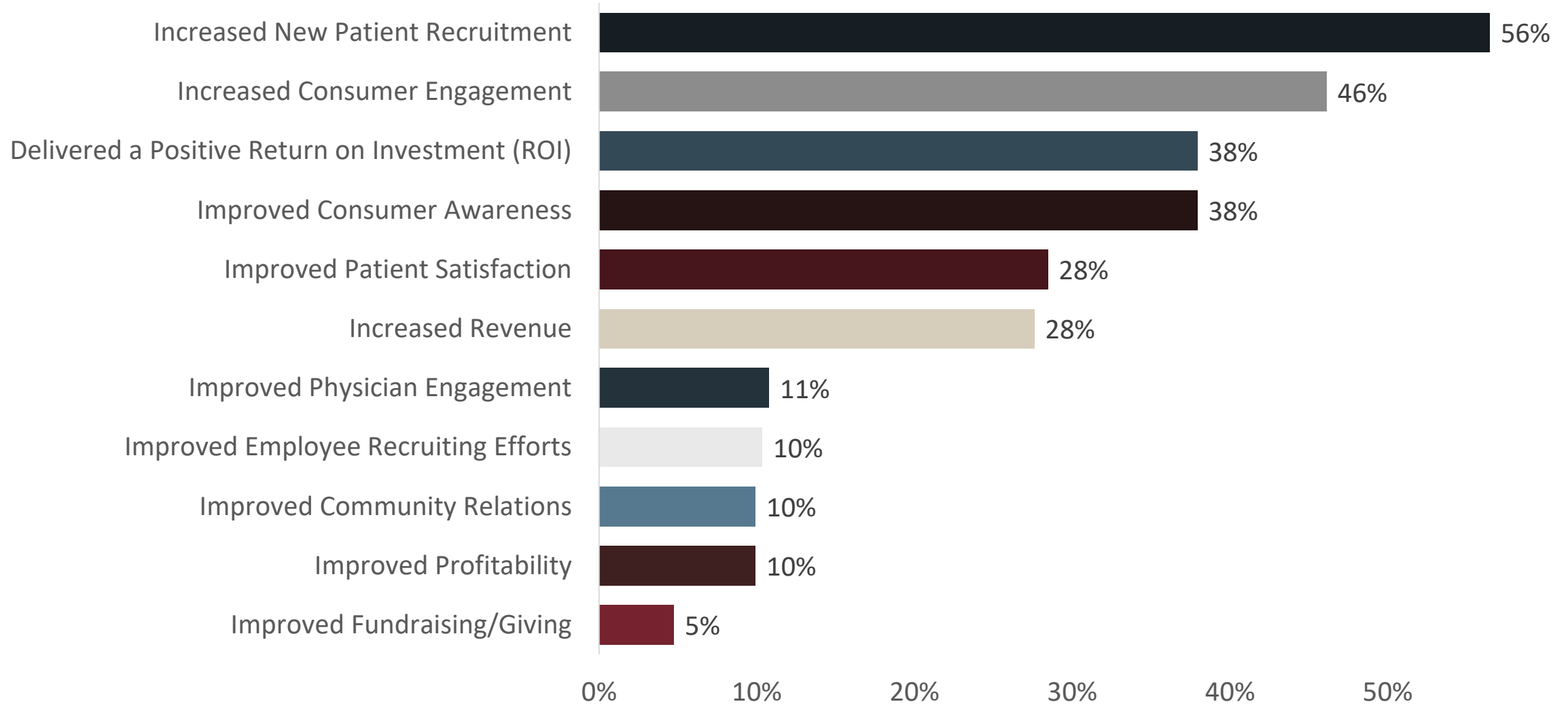
Ahead/Behind - Leaders



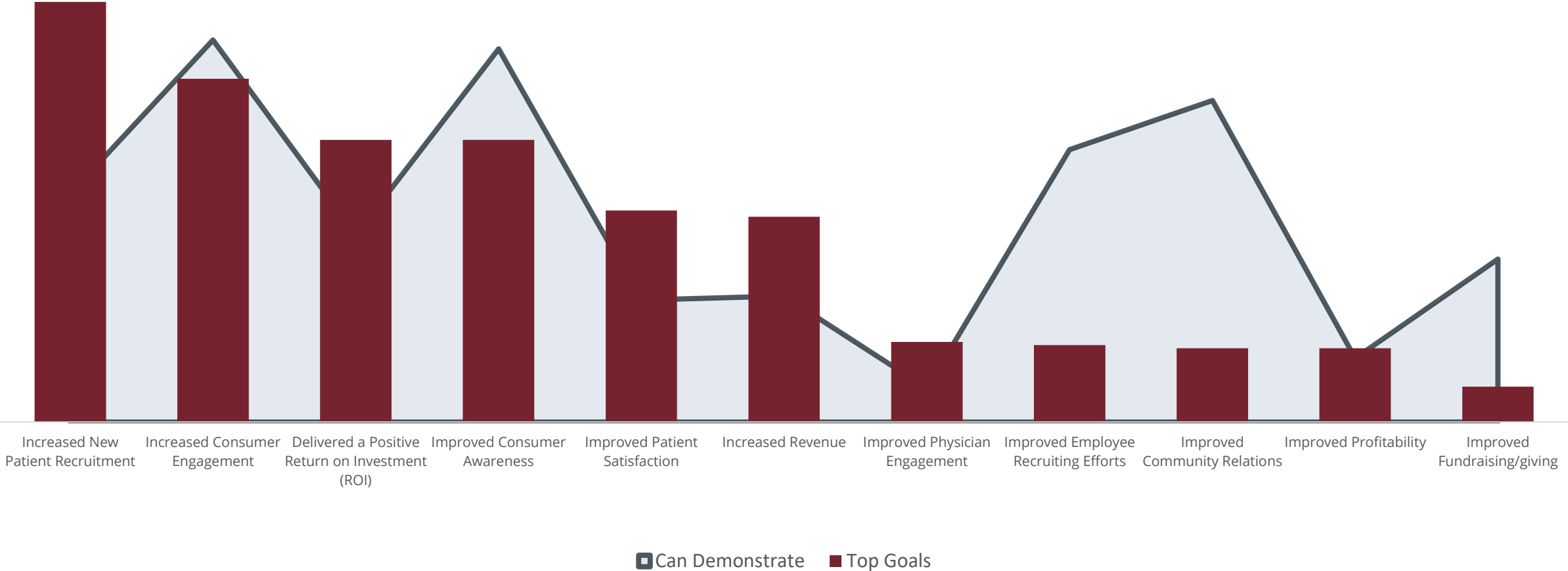


Hospitals Want Patients But Are They Getting Them?

Top Digital Marketing Goals



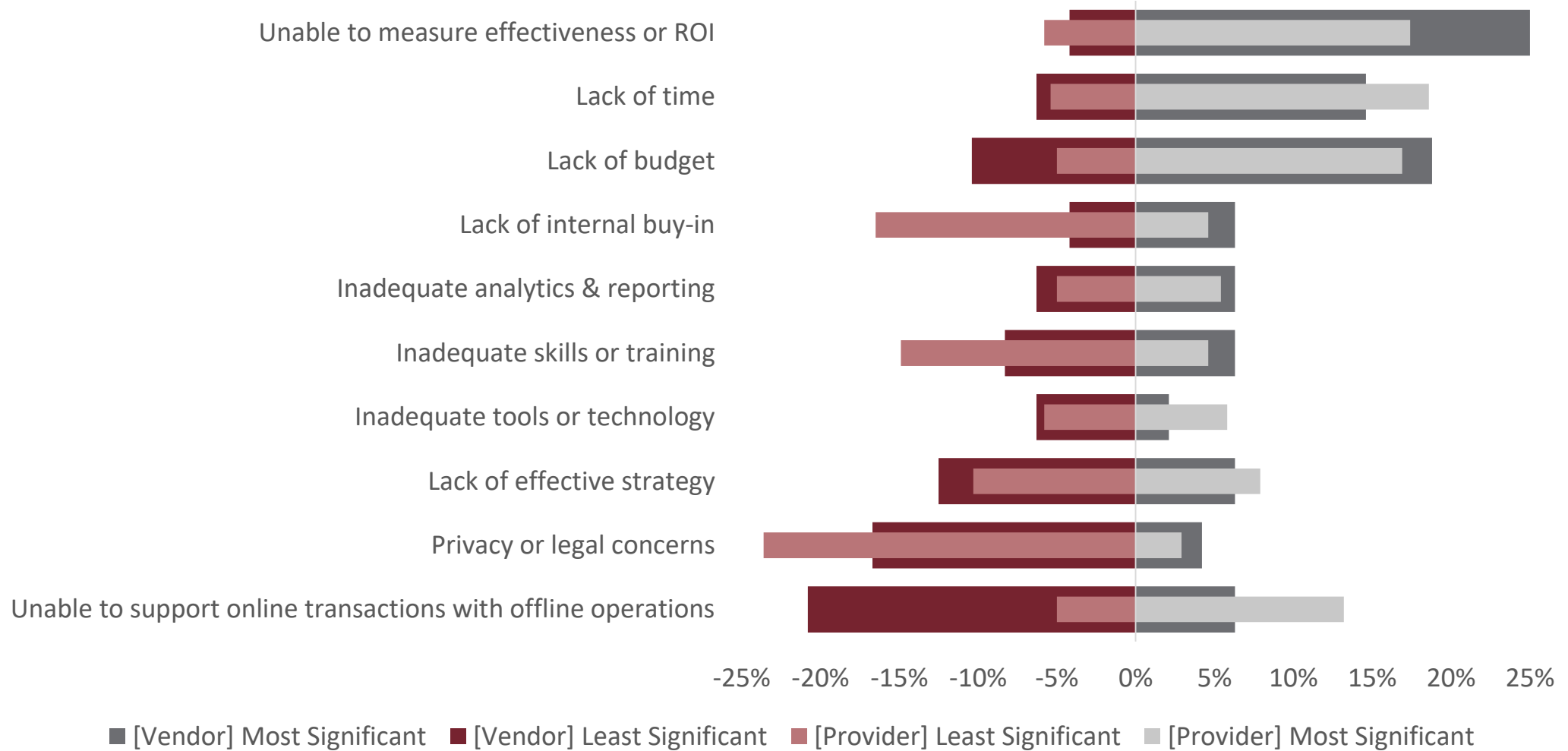
Comparing Goals with Ability to Demonstrate



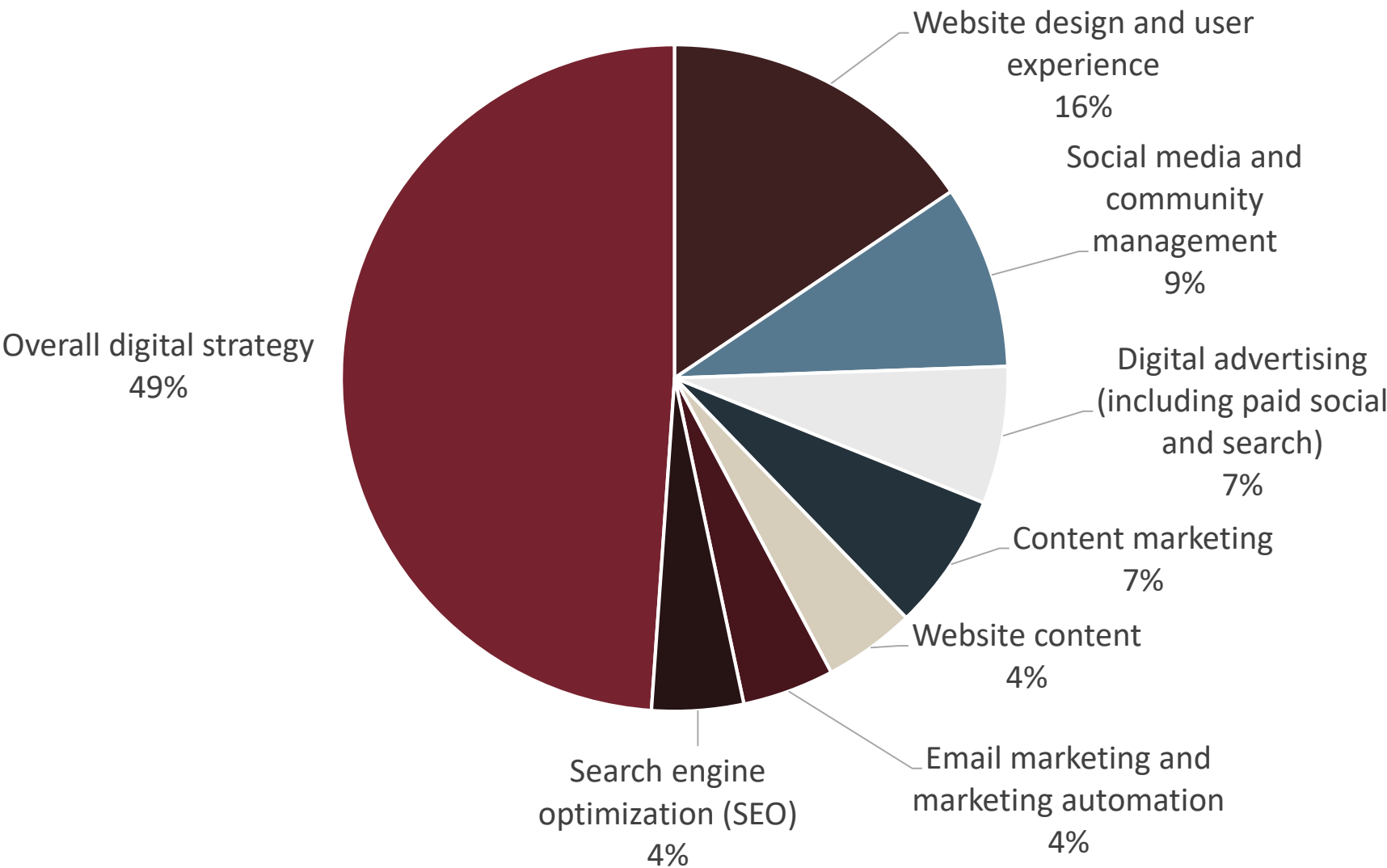


Emerging Challenges: Operational Integration & Digital Strategy

Vendor vs. Provider - Most/Least Significant Problems



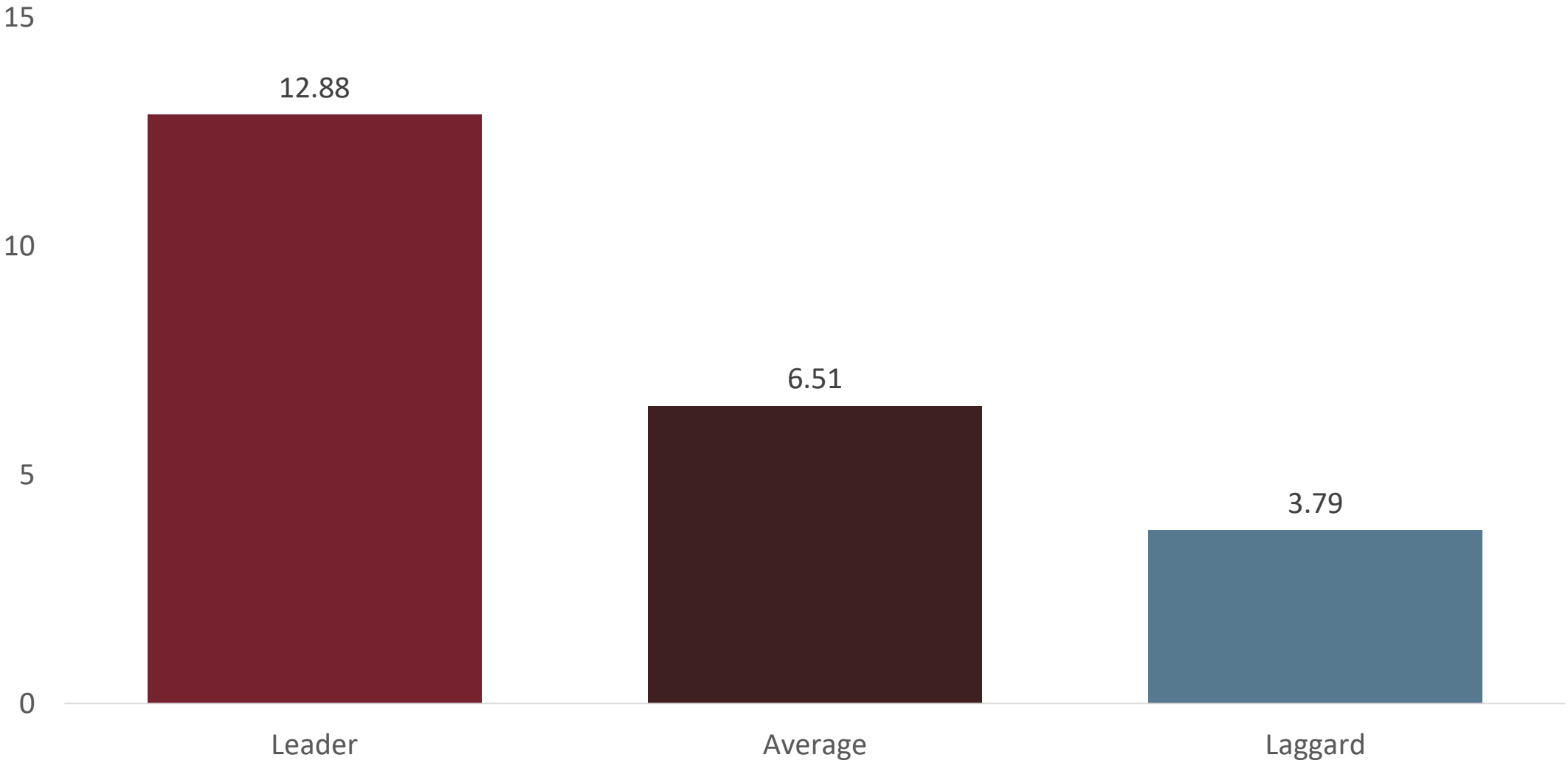
Where is Healthcare Falling Behind Other Industries? [Vendors]



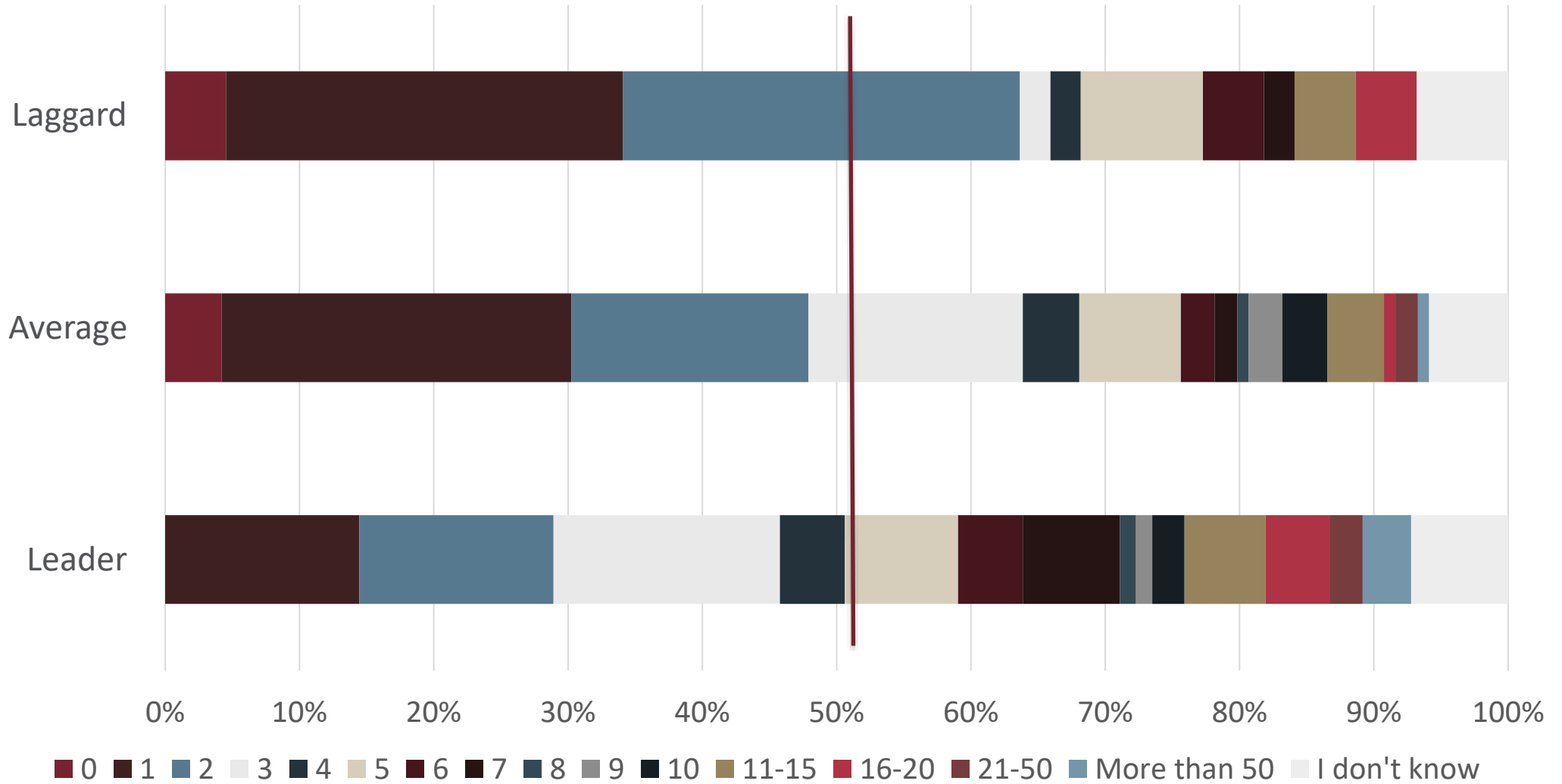


Hot Jobs in Healthcare: Content, CRM, Social, & Marketing Automation

Average Digital Marketing Team FTEs



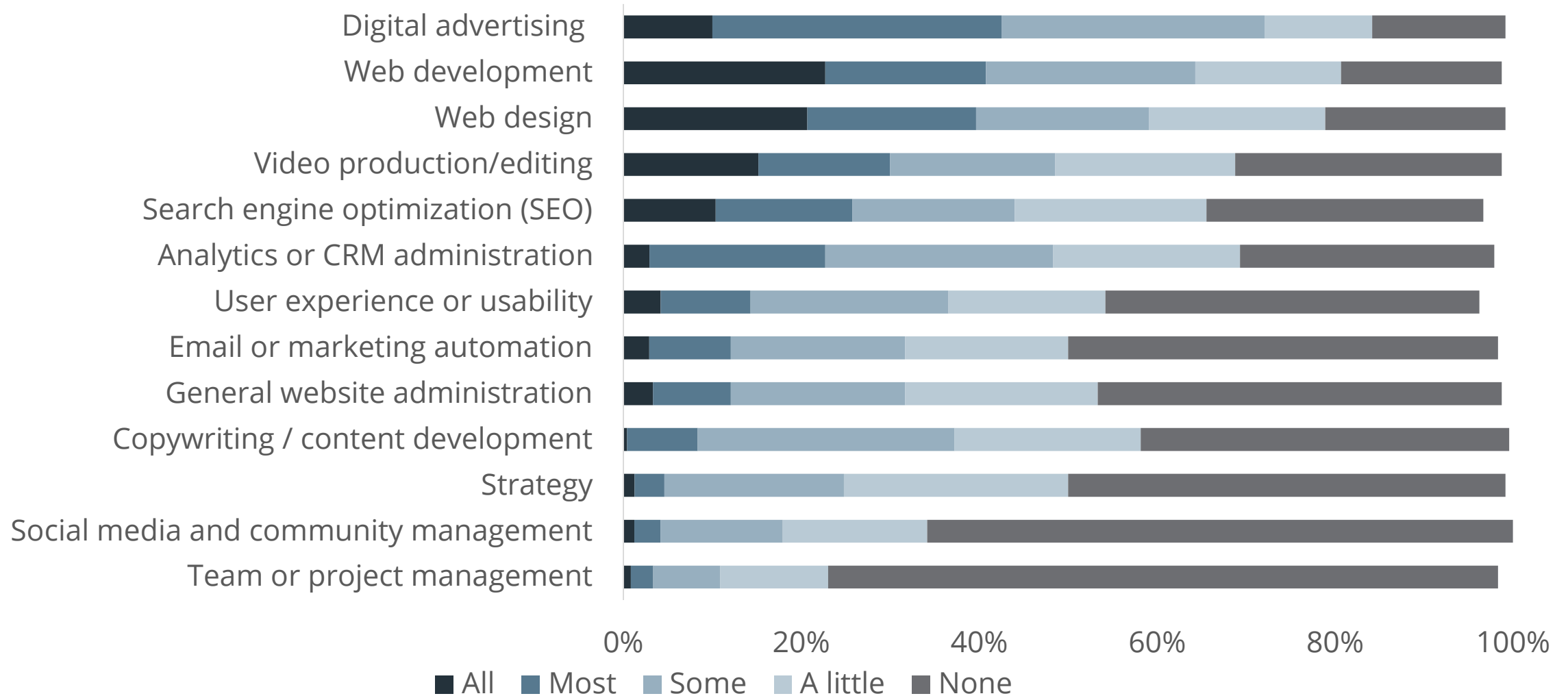
Digital Marketing Team Size Distribution by Leader/Laggard



FTEs By Role



Effort outsourced to vendors (overall)



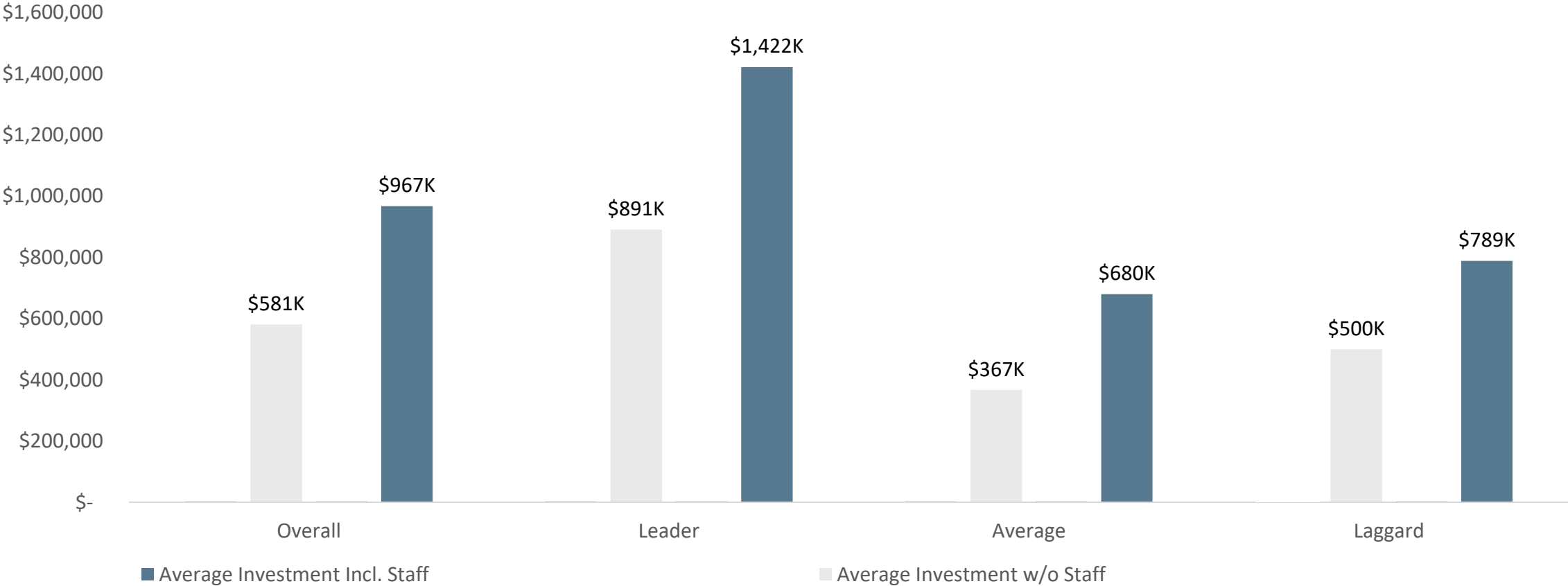
Roles with Greatest Planned Investment Growth

	Copywriting / content development	Analytics or CRM administration	Social media and community management	Email or marketing automation
Avg FTE	1.27	0.78	0.98	0.66
Expected net staff growth	16%	14%	11%	11%
Insourcing ("none" or "a little")	62%	50%	82%	67%
Outsourcing ("all" or "most")	8%	23%	4%	12%
Insufficient investment	57%	65%	37%	52%
Adequate investment	37%	30%	61%	48%
Over investment	7%	4%	2%	0%

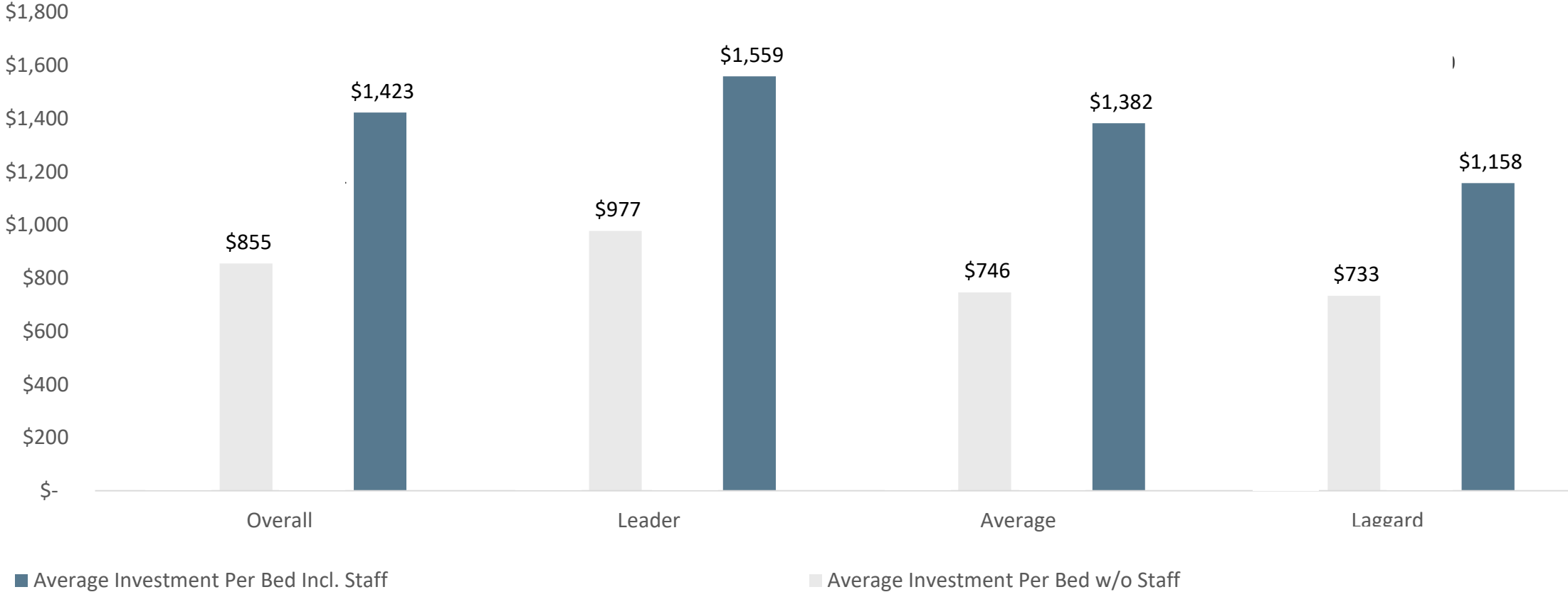


Marketing Investment Shifting From Traditional to Digital

Annual Digital Investment

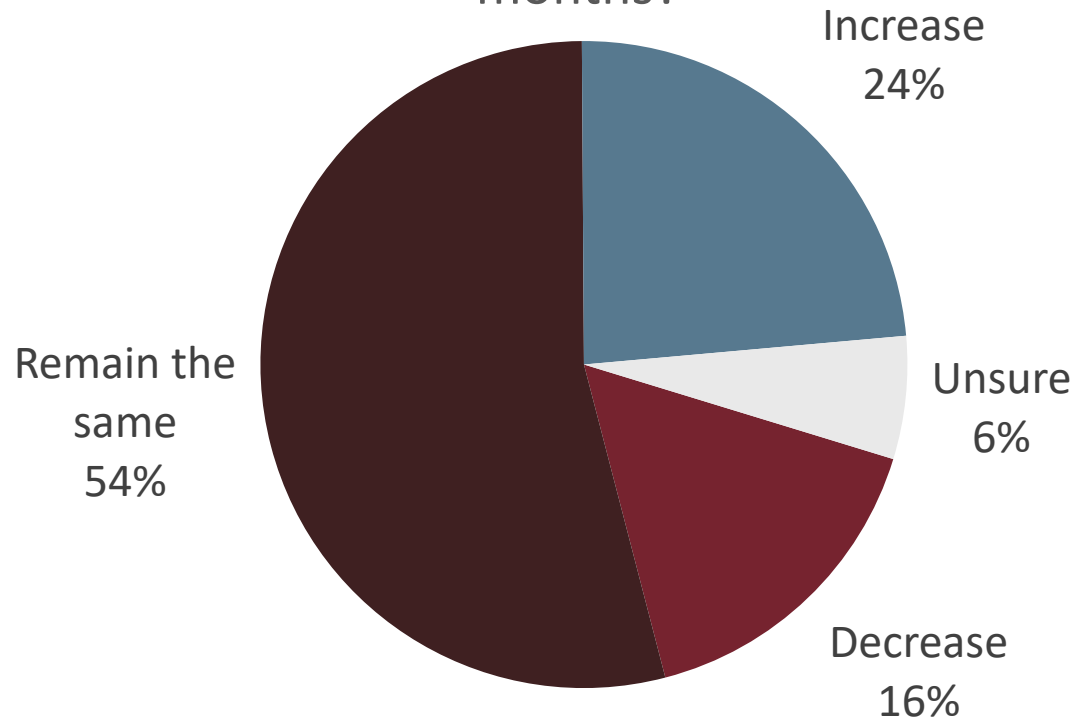


Annual Digital Investment per Bed

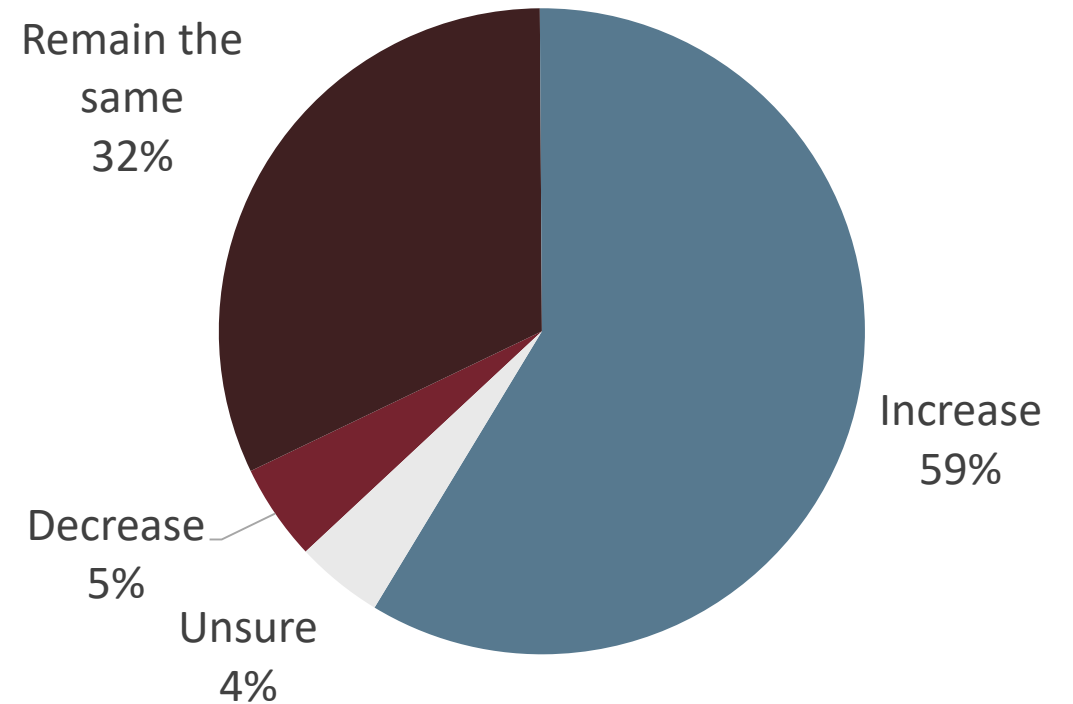


Budget Changes

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



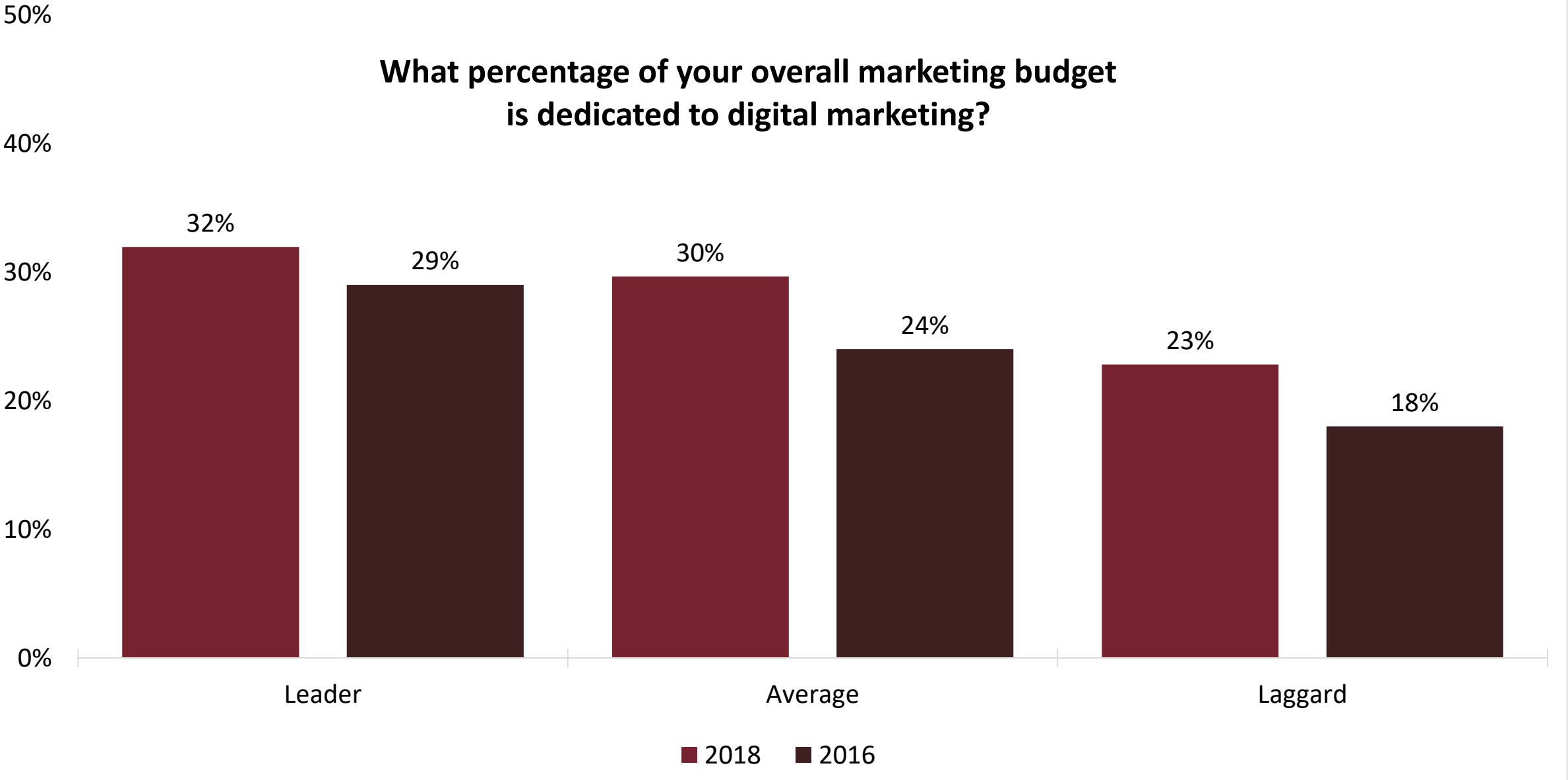
What do you expect to happen to your **digital marketing budget** in the next 12 months?



Budget Changes

		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%

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

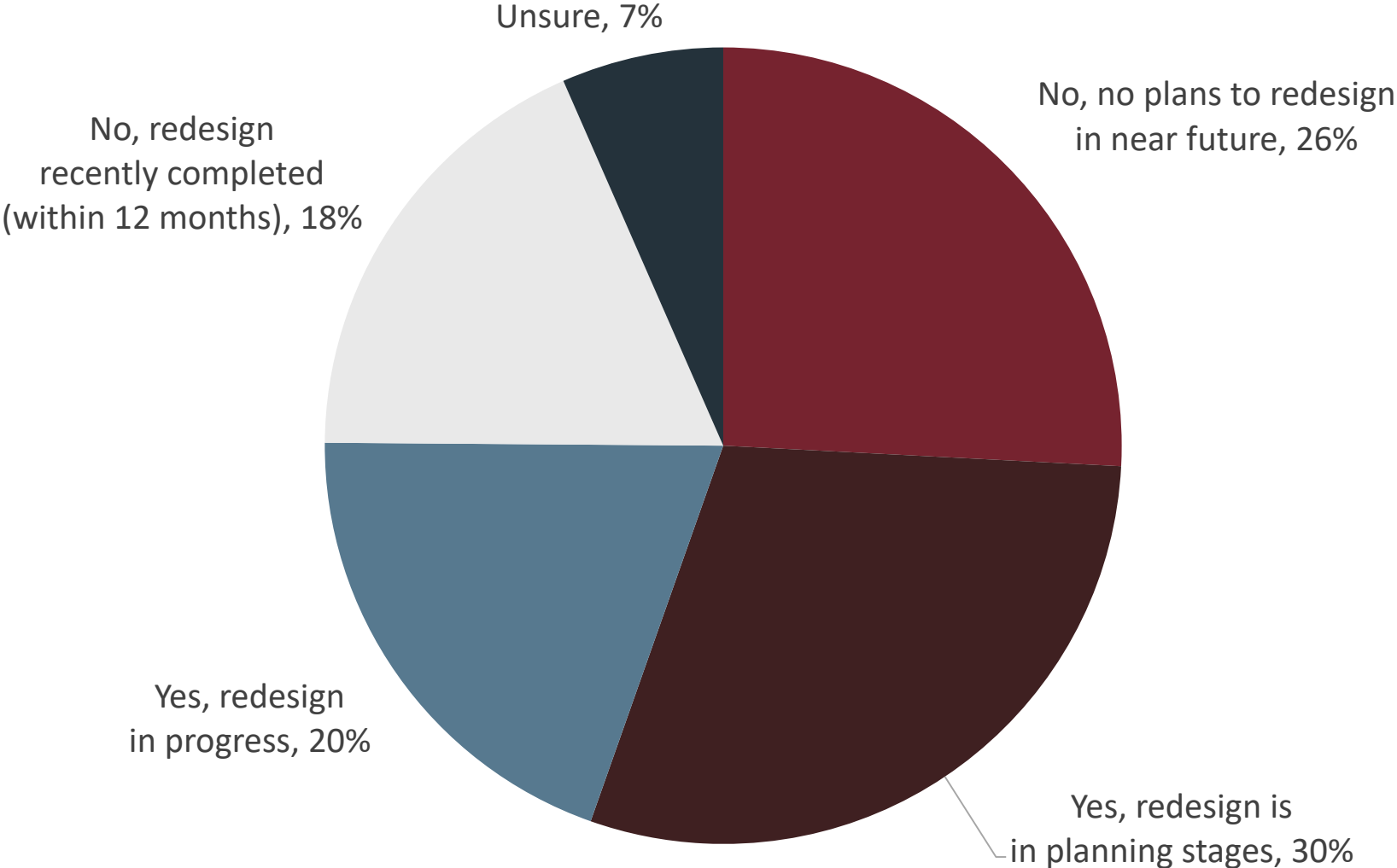




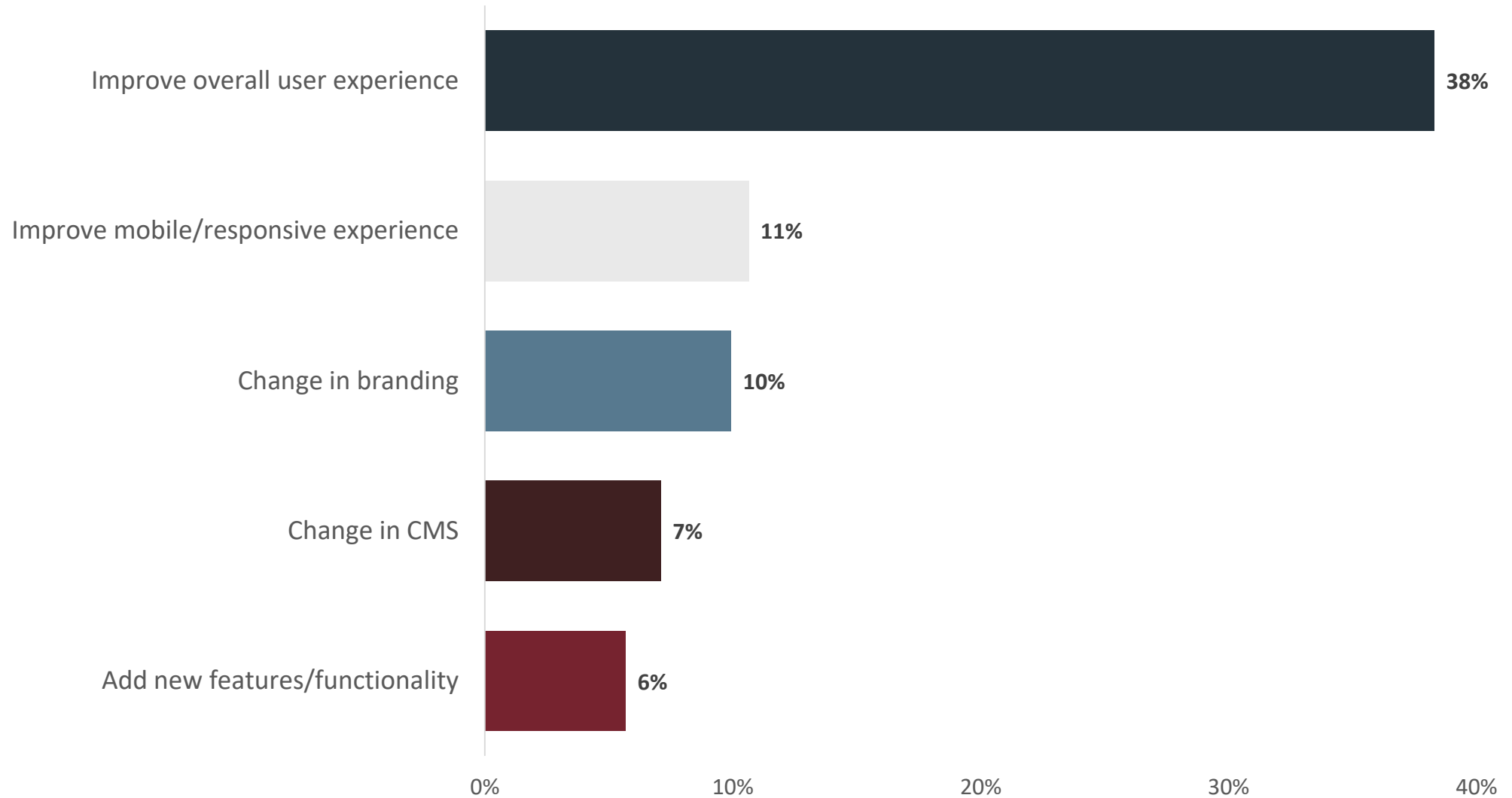
Redesign Cycle

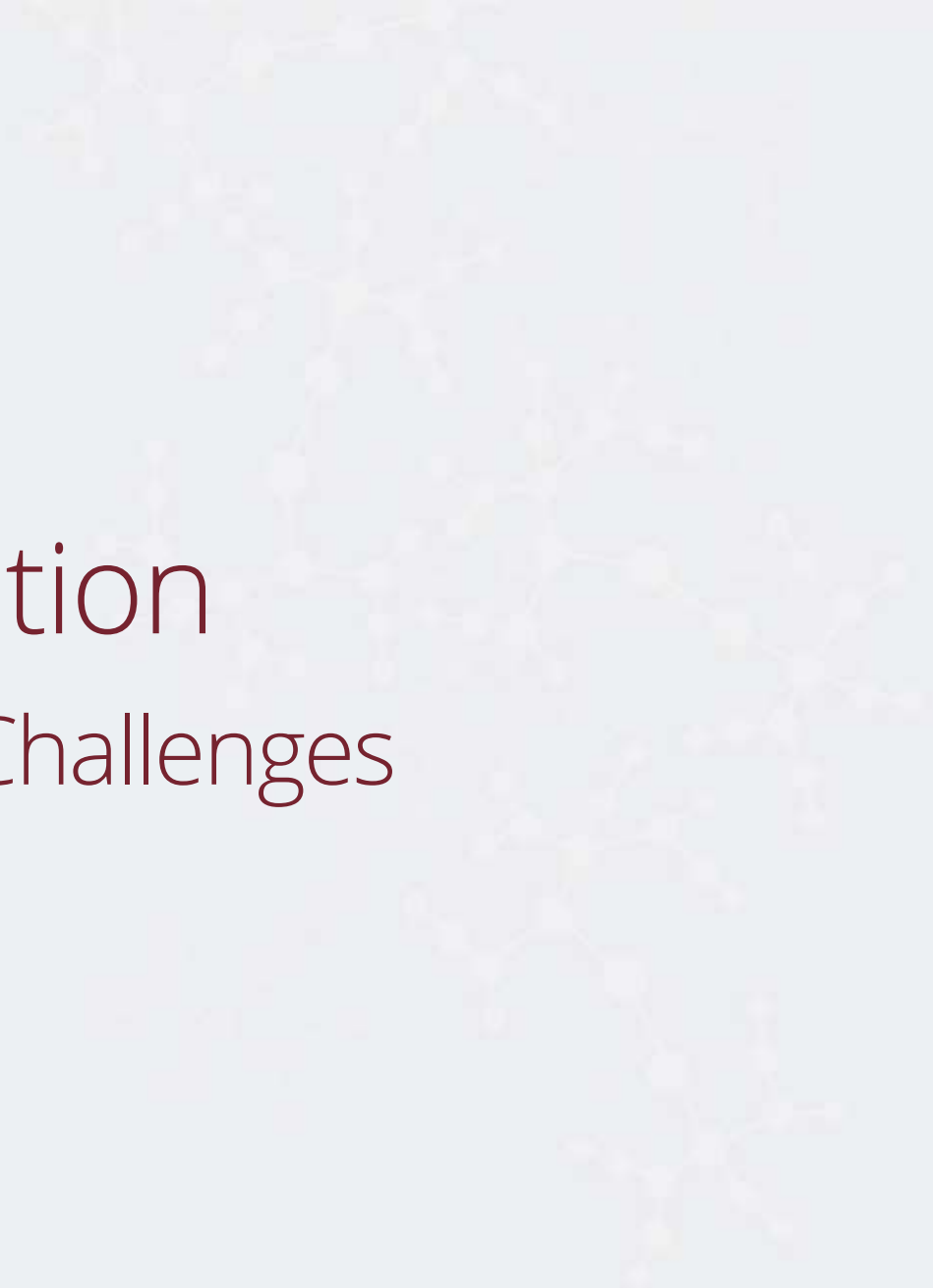
Picking Up Steam

Do you plan to redesign your main website(s)?



Primary Motivation for Redesign

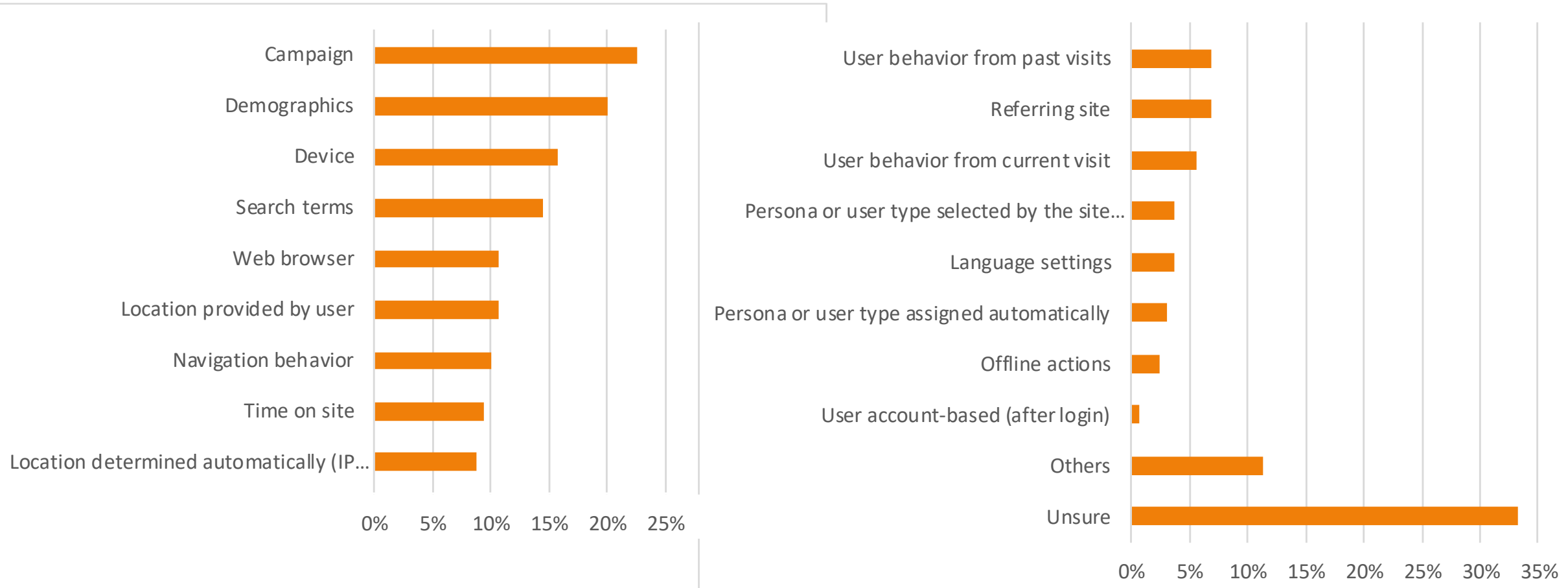




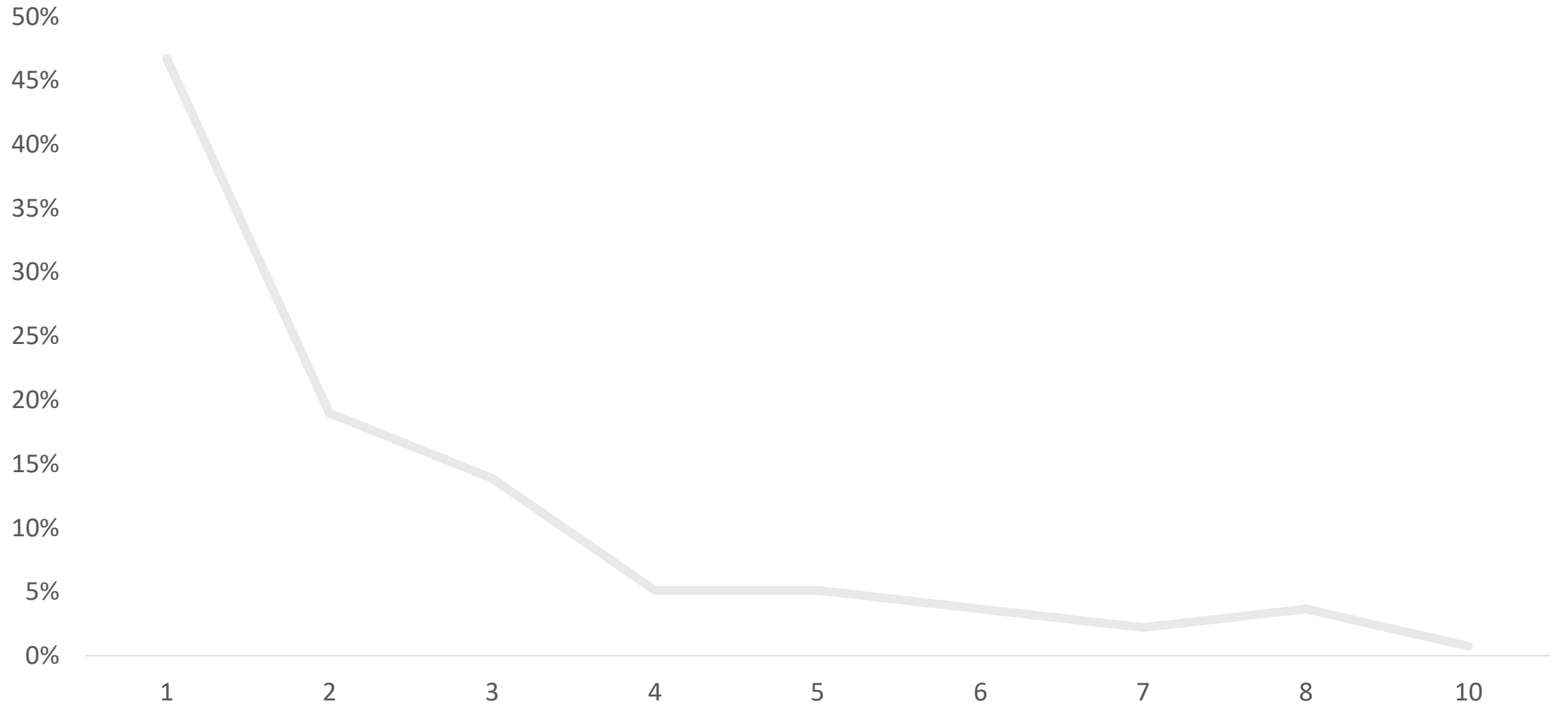
Personalization

Opportunities and Challenges

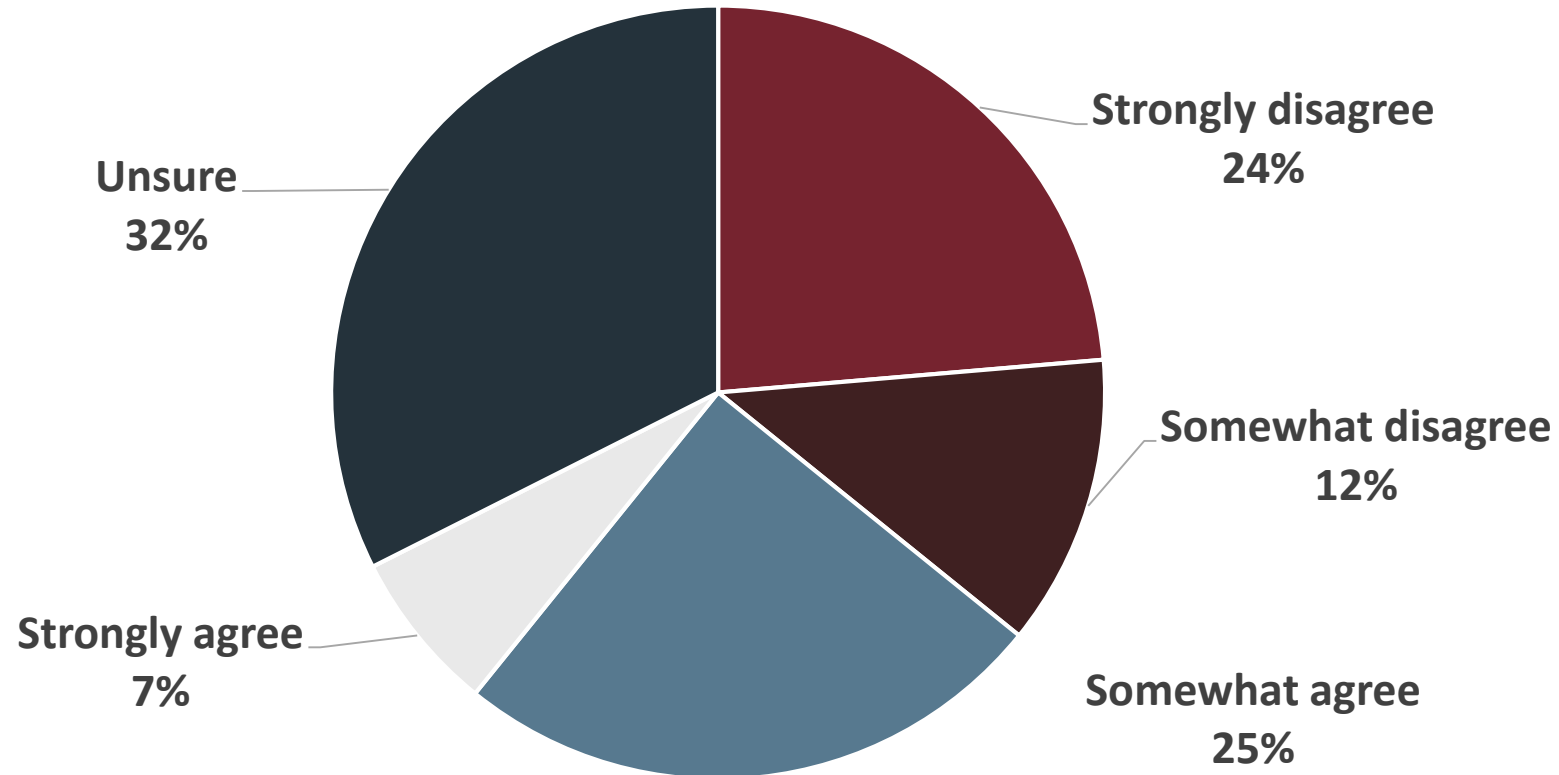
Methods Used for Website Personalization



Number of Personalization Methods Used

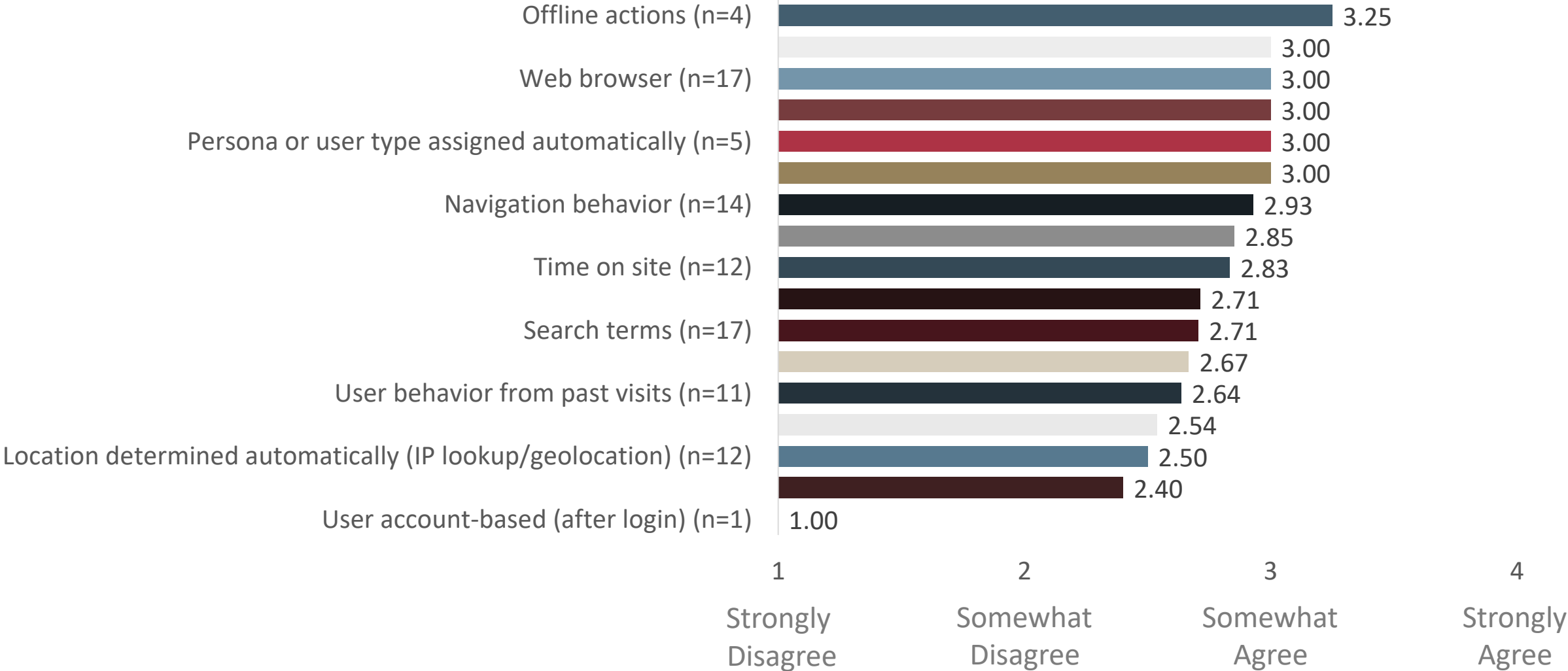


Our organization can demonstrate that website personalization has improved the performance of our digital marketing.



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

Able To Demonstrate Personalization Value by Personalization Method



Upward Mobility Leader/Laggard

If you're a laggard...

- **Hire smart.** Take a tip from leaders who put more resources into strategy and supplement their teams more frequently with deeper outside expertise.
- **Invest in that new site.** For those 71% of laggards who are planning a redesign, think strategically about your upcoming redesign.
- **Look at additional MarTech.** Build a case for getting those critical pieces you need to compete.

If you're average...

- **Make your investments pay off.** Added staff should help improve your ability to measure effectiveness
- **Train or outsource where you have skill gaps.** Leaders, despite having the largest staffs, are most likely to use a mix of both in-house and outsourced resources.
- **Push limits.** Keep pushing boundaries and thinking strategically about moving offline processes to the web

If you're a leader...

- **Problems get harder to solve.** Keep bringing innovative capabilities to your site and start the conversations and build relationships across teams that can make those big ideas a reality.
- **Continue to invest in strategy.** Your strides in strategy are paying off.
- **Keep connecting the dots.** To keep that top spot, you'll need to continue to invest in measurement – not only ROI, but also how you're impacting consumer engagement and increasing revenue.