

The State of Digital Marketing in Healthcare in 2021

Presented in conjunction with:

Medicom Health 

Today's Presenter



Ben Dillon

Chief Strategy Officer



70+ Healthcare Clients

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The State of Digital Marketing in Healthcare in 2021

eBook

2021 Healthcare Digital Marketing Trends Survey

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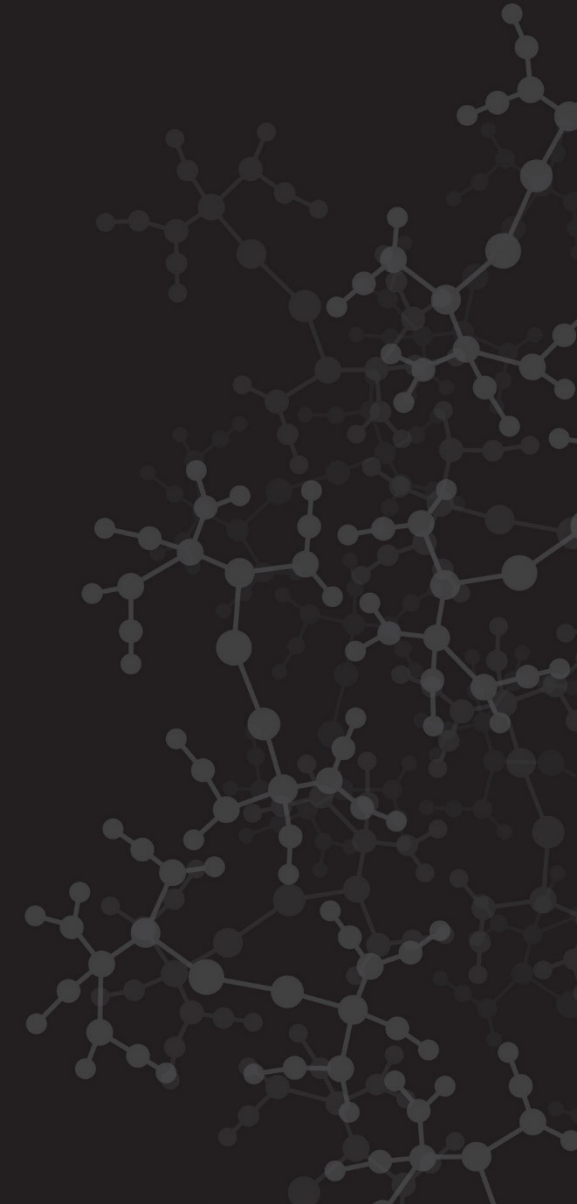


Survey Advisory Board

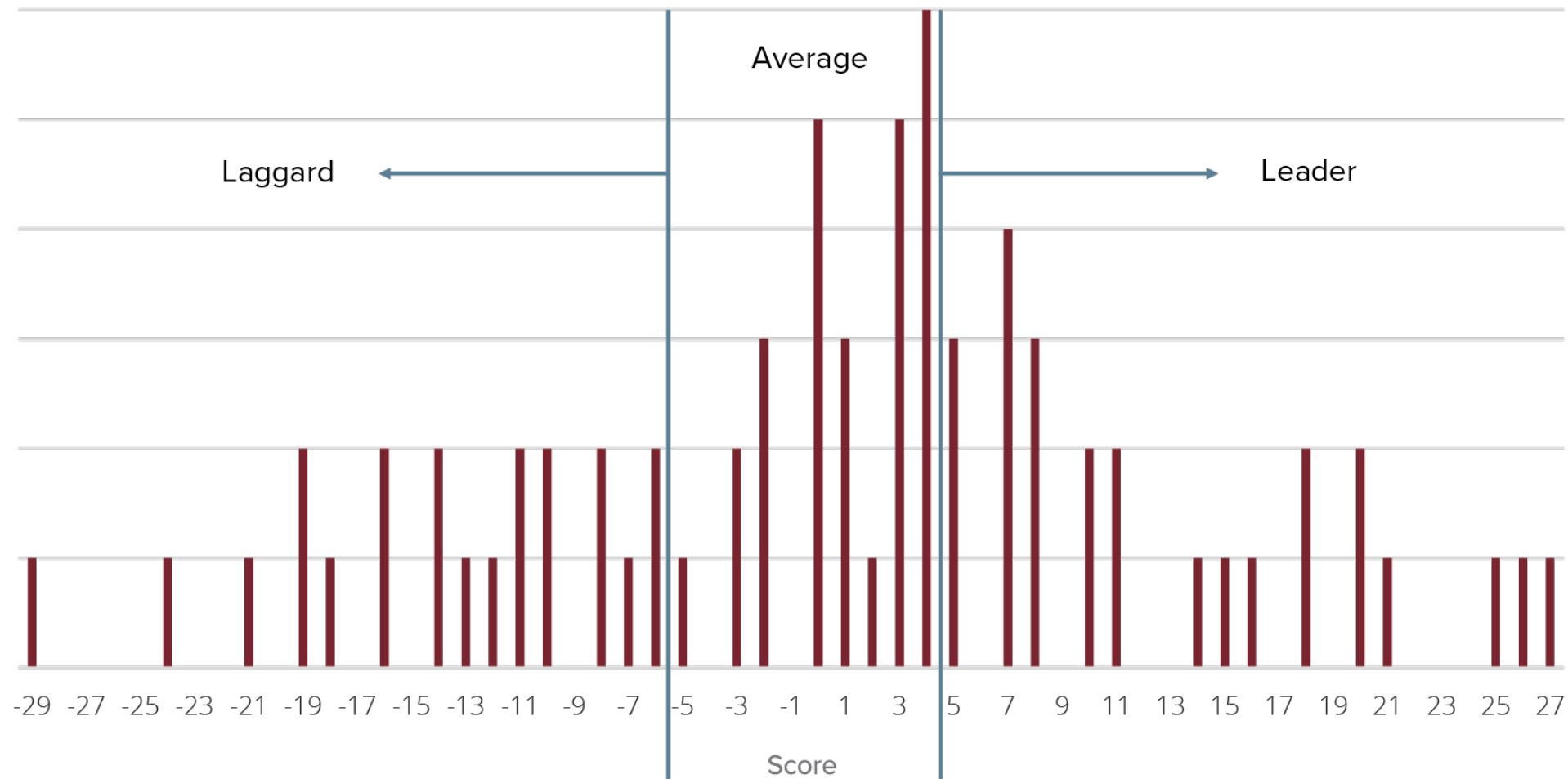
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- **Lindsey Meyers**, Vice President, Avera
- **Jessica Puder**, CRM Marketing Manager | Roper St. Francis Healthcare



Segments: leader, average and laggard

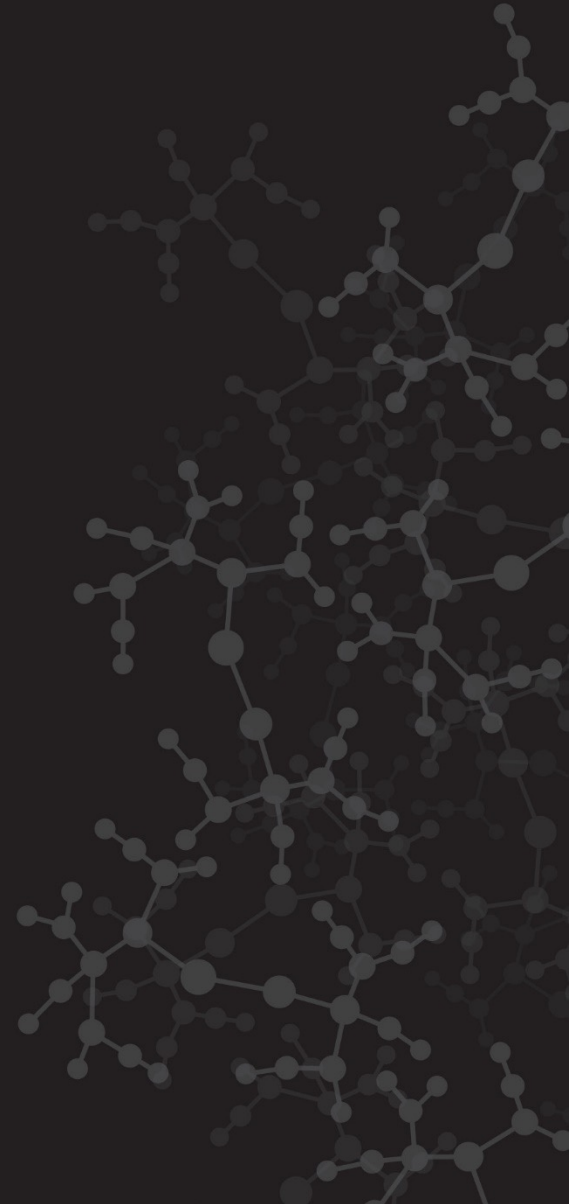


Leader/Laggard Distribution





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

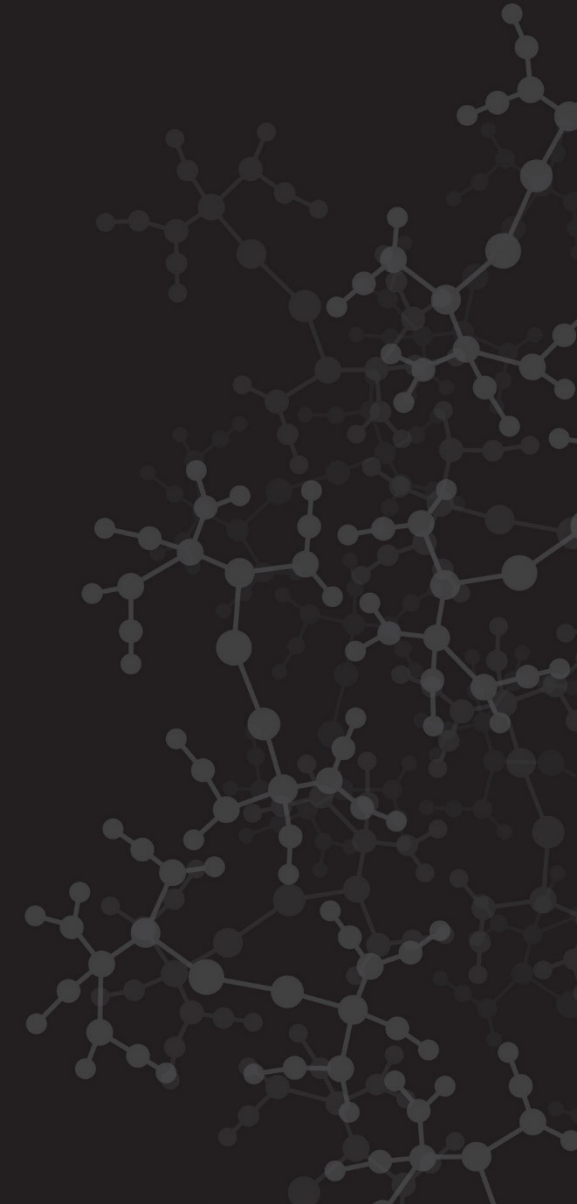
Where is healthcare furthest behind

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

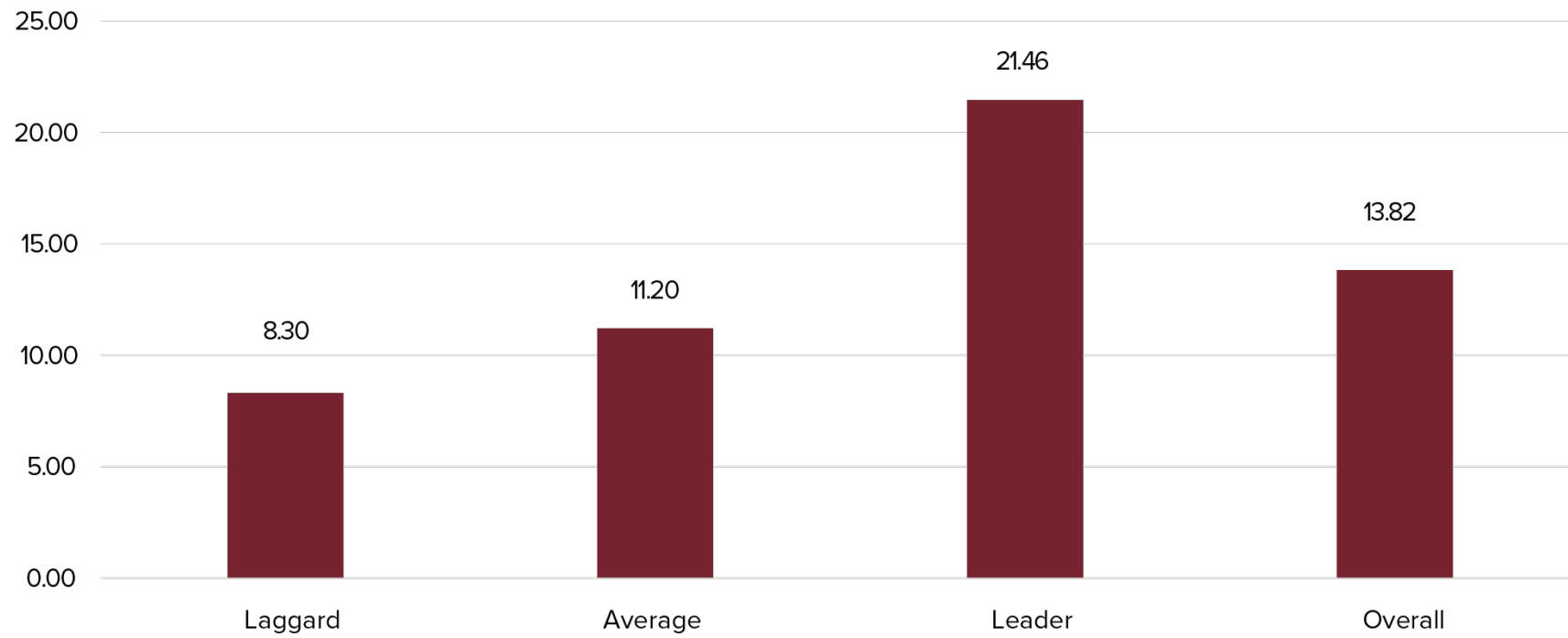
	Provider (Order)		Vendor (Order)	
Personalization	1		1	Digital strategy
User experience	2		2	User experience
CRM	3		3	Personalization
Mobile app development	4		4	Analytics
Email or marketing automation	4		4	User research/testing
Analytics	6		4	Content marketing
Online reputation management	7		7	Video 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

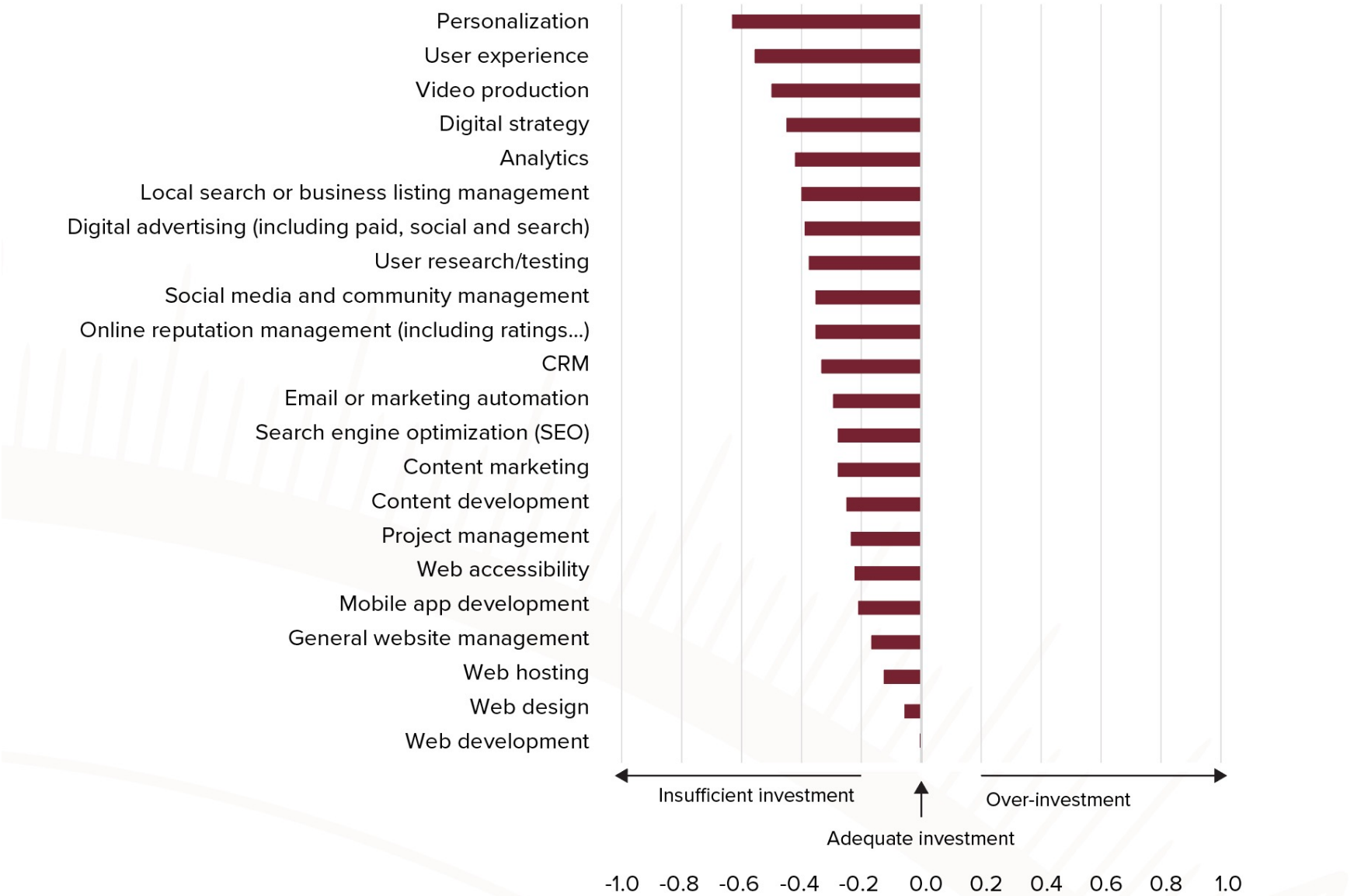
Outsourcing Trends

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

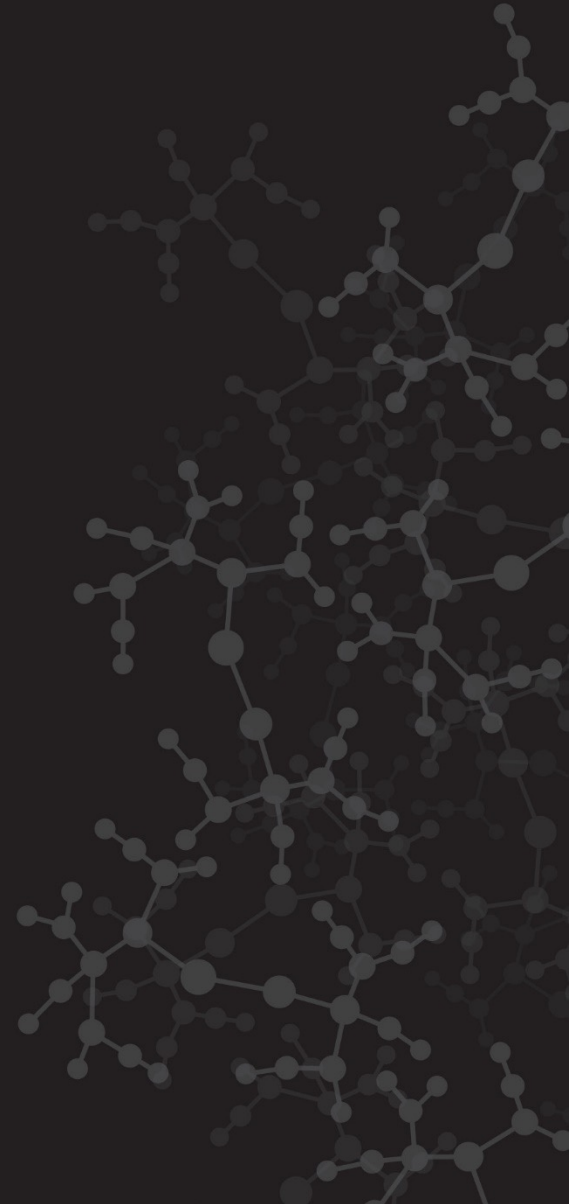


Agency Perspective: Level of Client Investment





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%

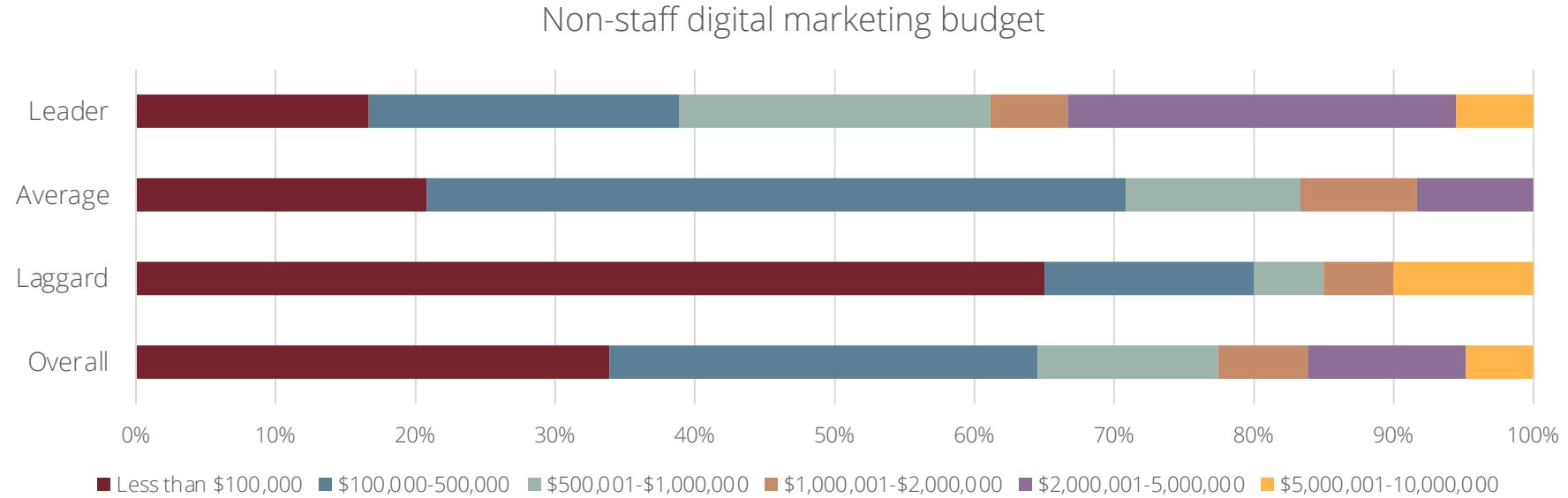
Digital marketing budget compared to before the pandemic				
	Laggard	Average	Leader	Overall
Higher than before the pandemic	42.86%	37.04%	12.00%	30.14%
About the same as before the pandemic	42.86%	51.85%	72.00%	56.16%
Lower than before the pandemic	14.29%	11.11%	16.00%	13.70%

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

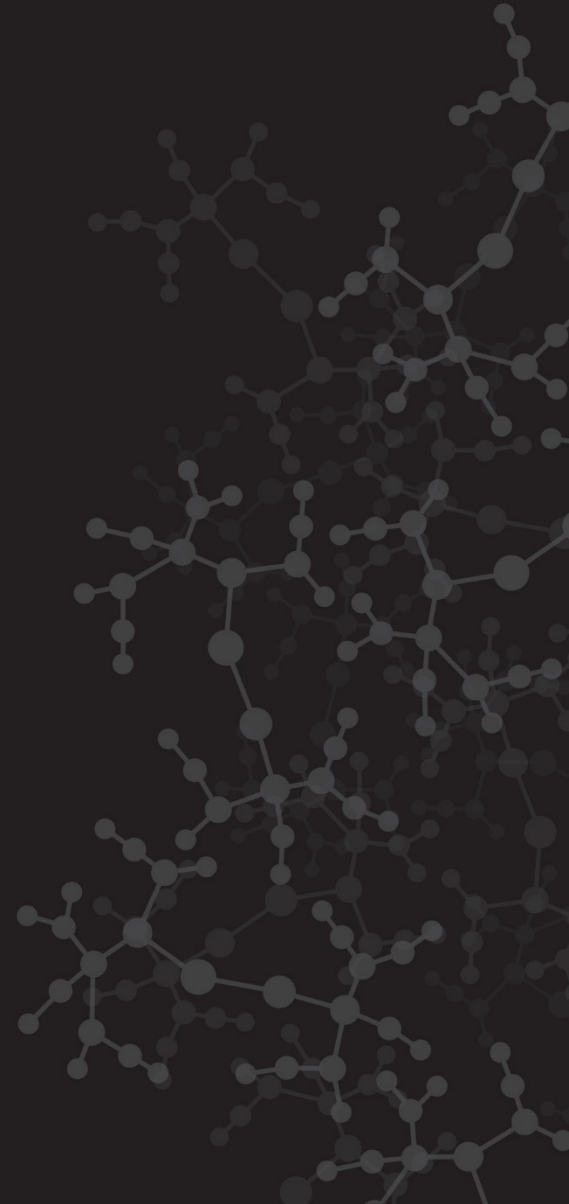
Digital budget does not come from marketing	
Leader	29.63%
Average	12.50%
Laggard	17.39%
Overall	19.51%



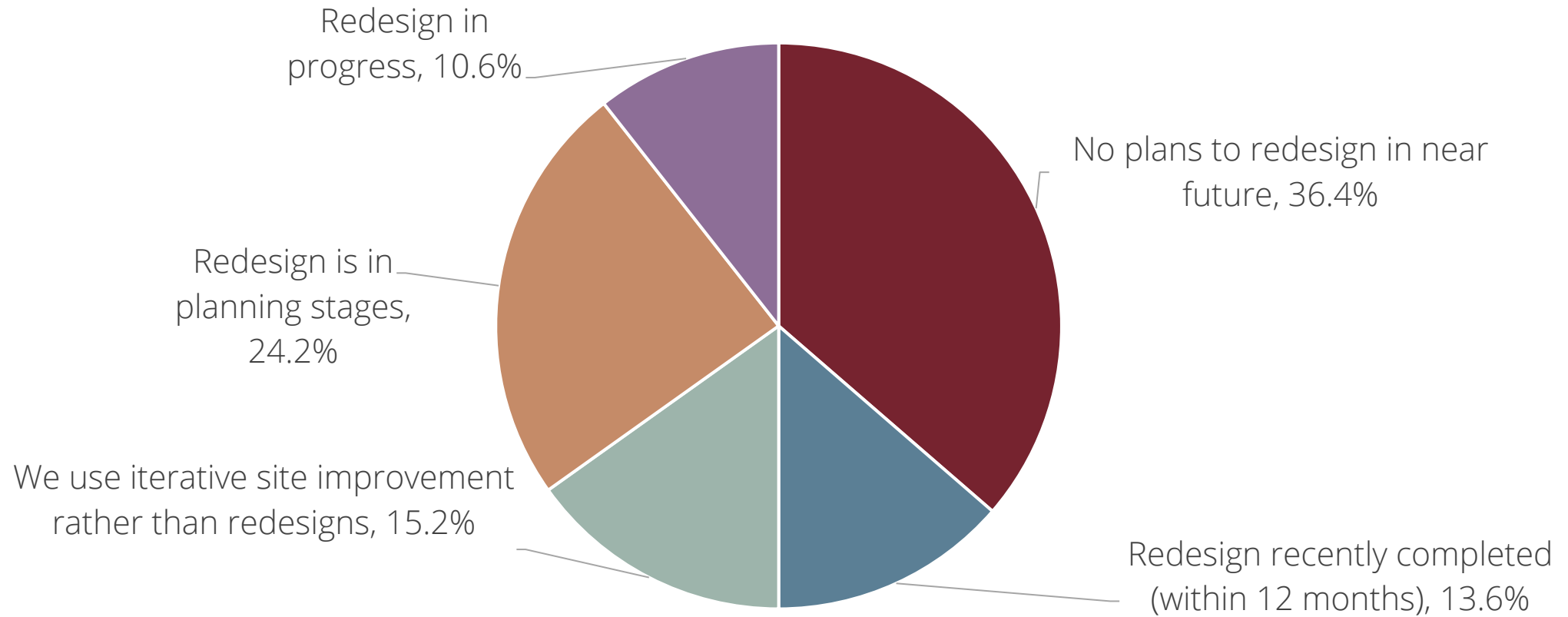
	Average Non-Staff Digital Marketing Budget	Average of Investment per bed
Leader	1,713,888.89	1797.34
Average	670,833.33	2090.50
Laggard	940,000.00	1609.95
Overall	1,060,483.87	1852.35



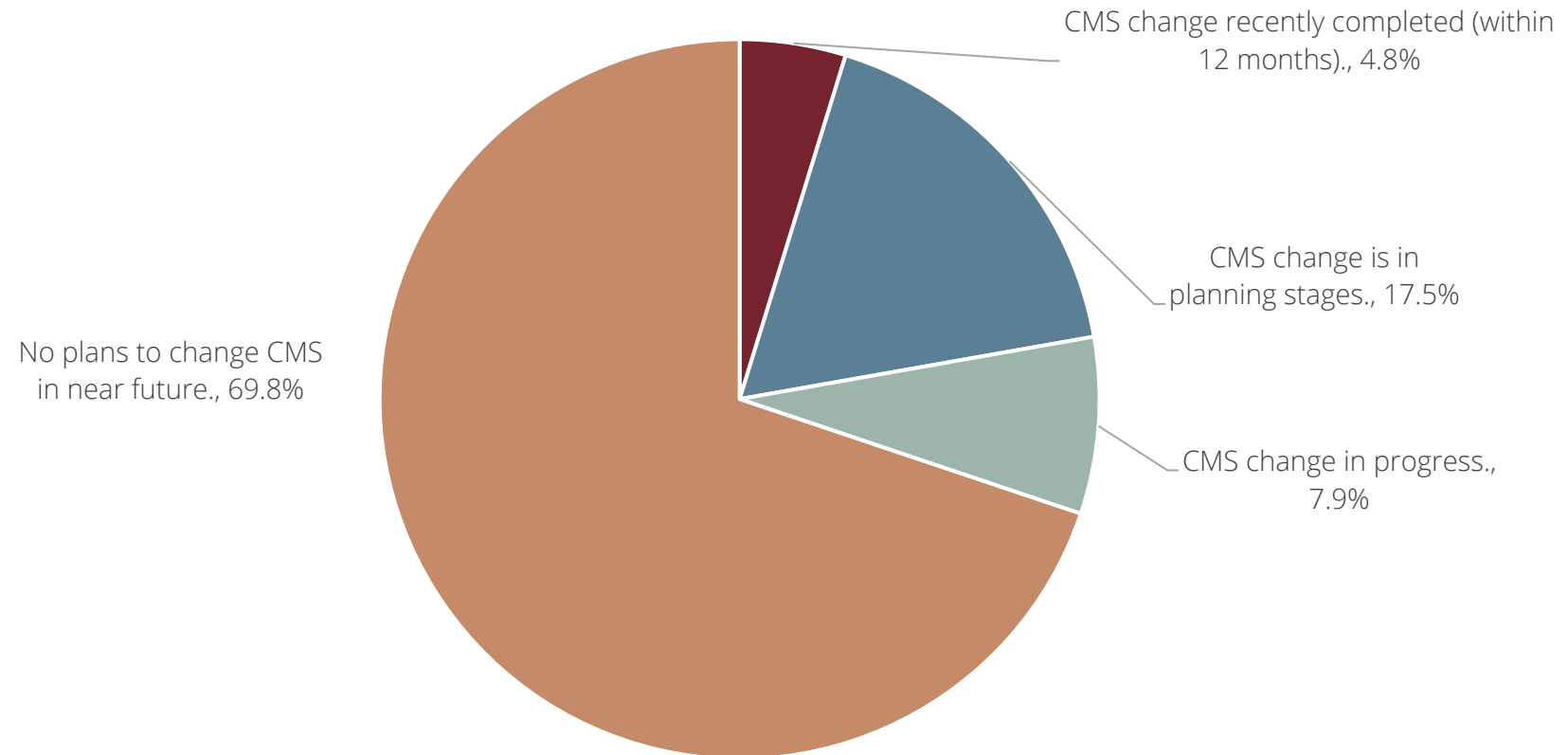
Redesigns and Replatforming



Redesign Plans



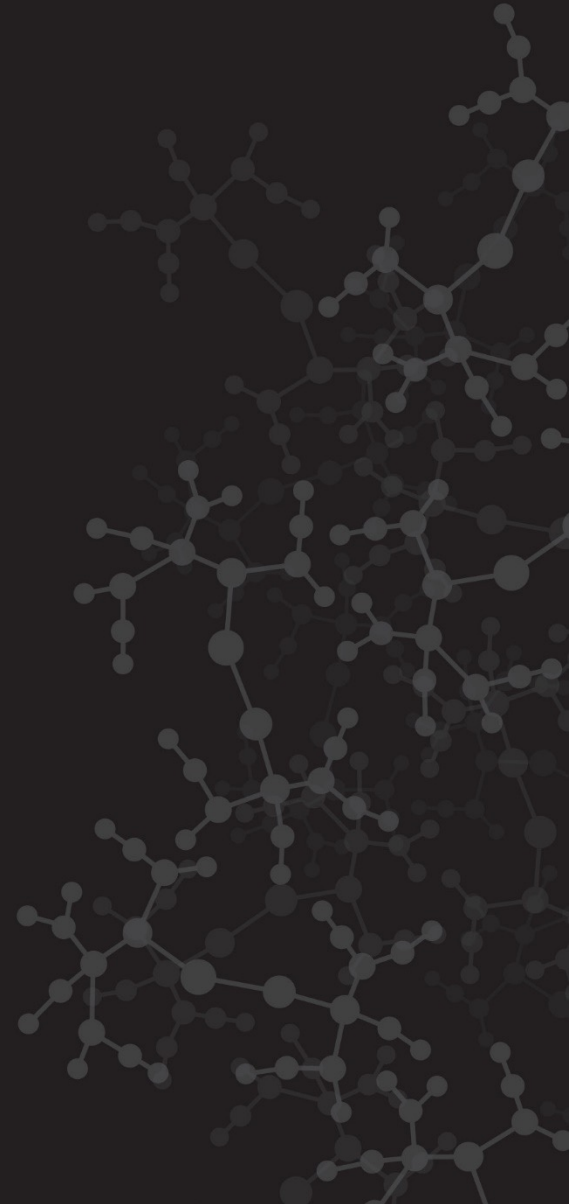
CMS Change Plans



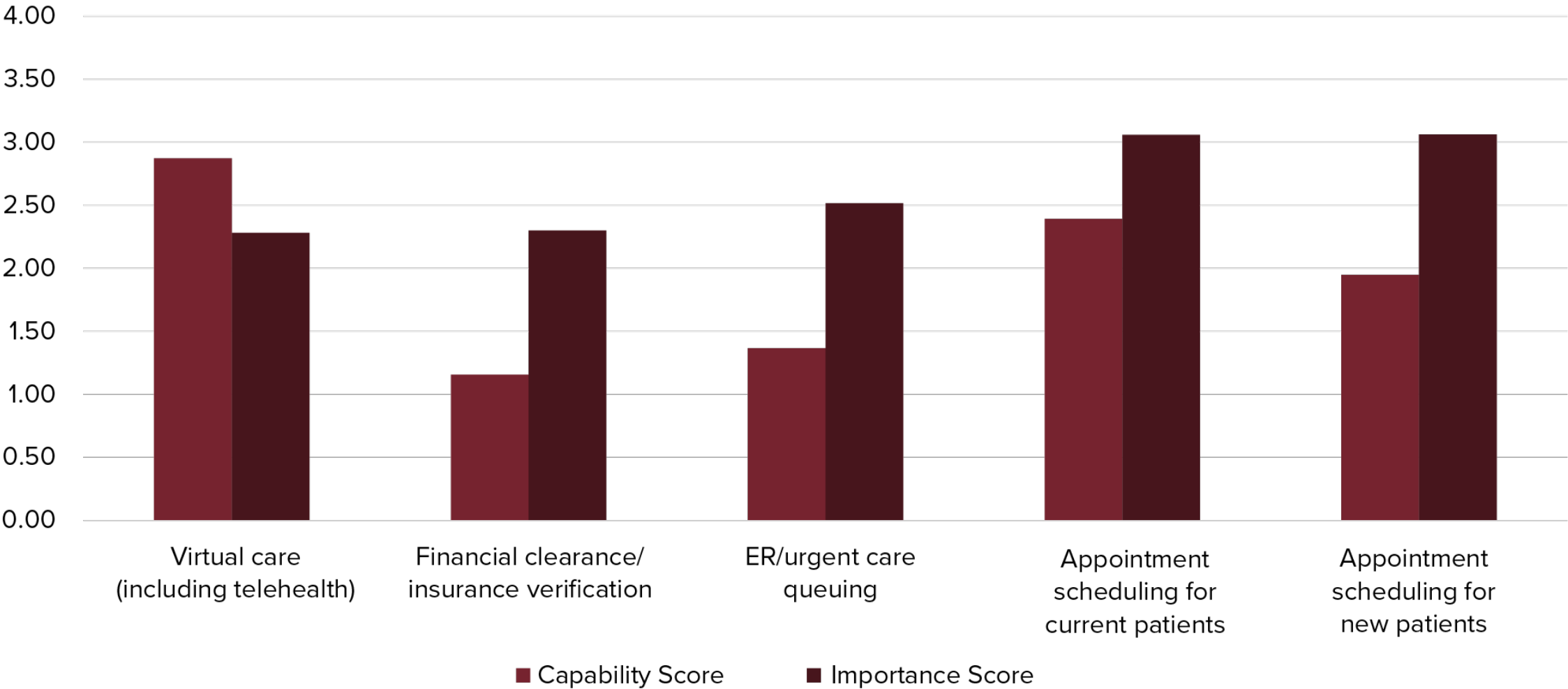
Planned Redesign vs. Planned CMS Change					
	No plans to redesign in near future	Redesign recently completed	We use iterative site improvement	Redesign is in planning stages	Redesign in progress
No plans to change CMS in near future	100%	44%	88%	36%	43%
CMS change recently completed	0%	33%	0%	0%	0%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



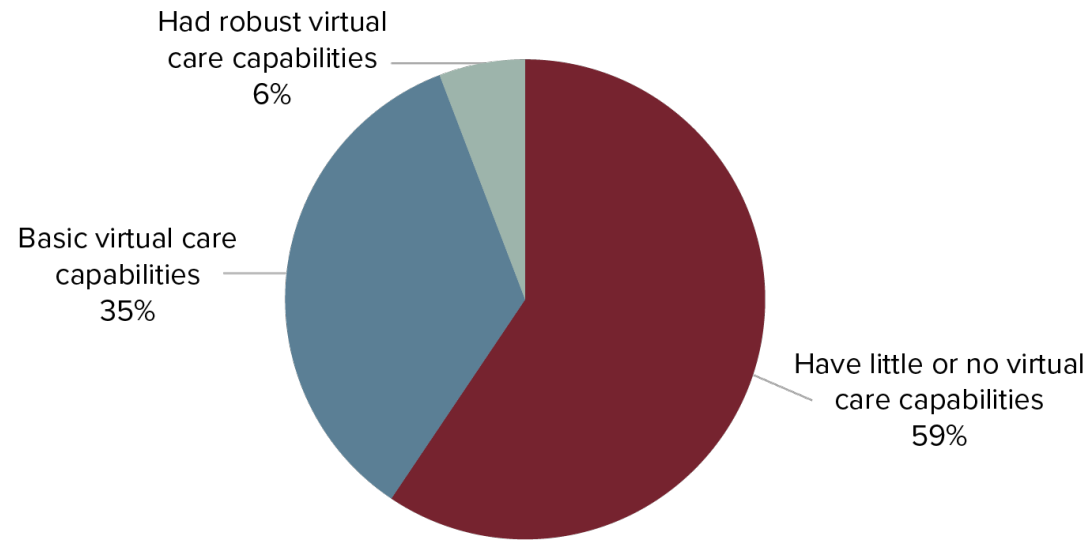
Digital Front Door



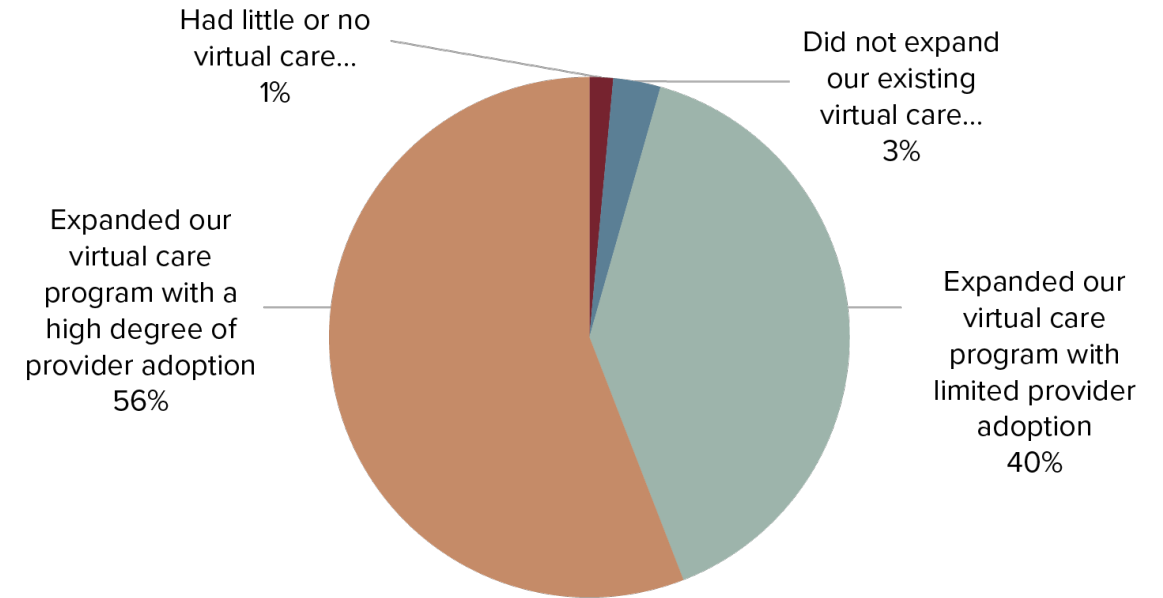
Digital Front Door - Care Access (Scale 1-4)



Before the pandemic, our organization had...



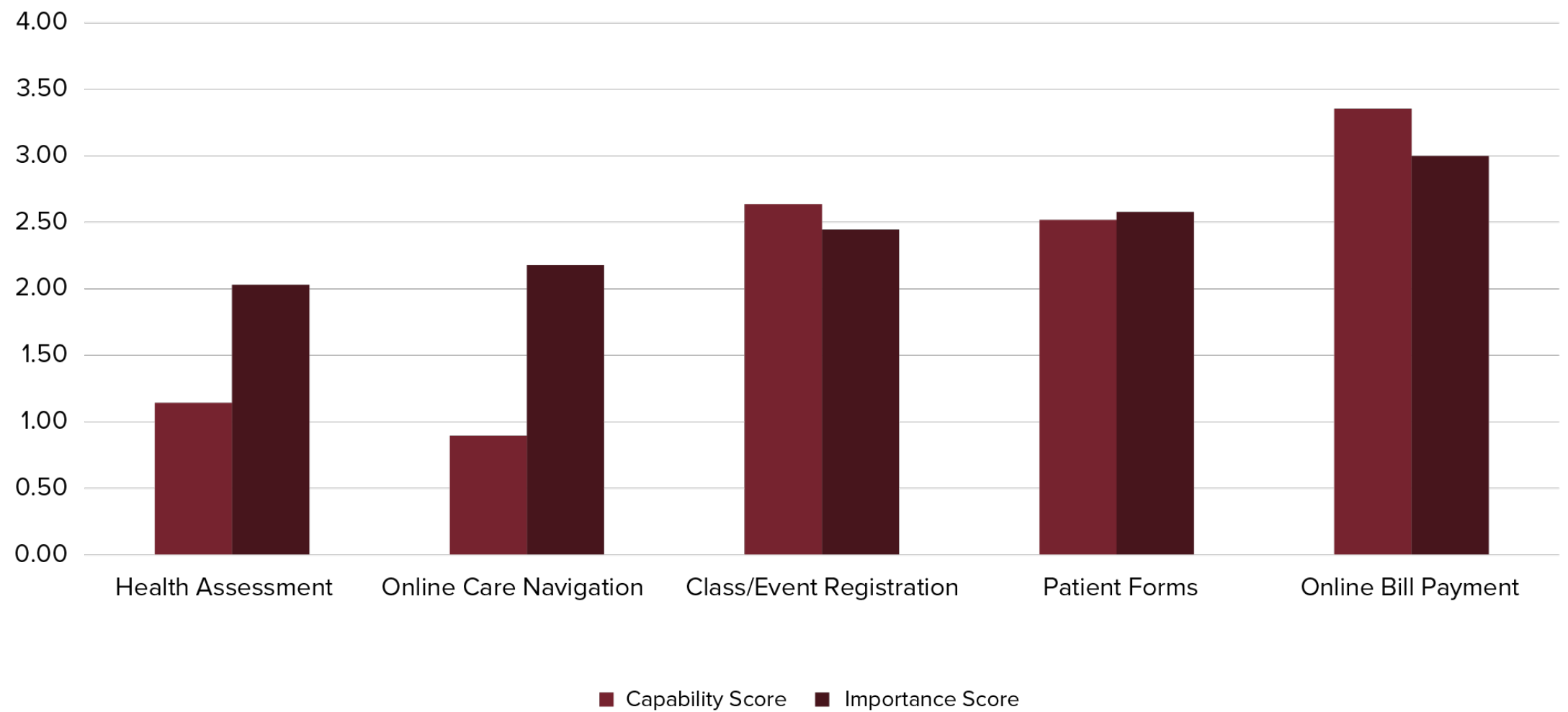
During the pandemic, our organization...

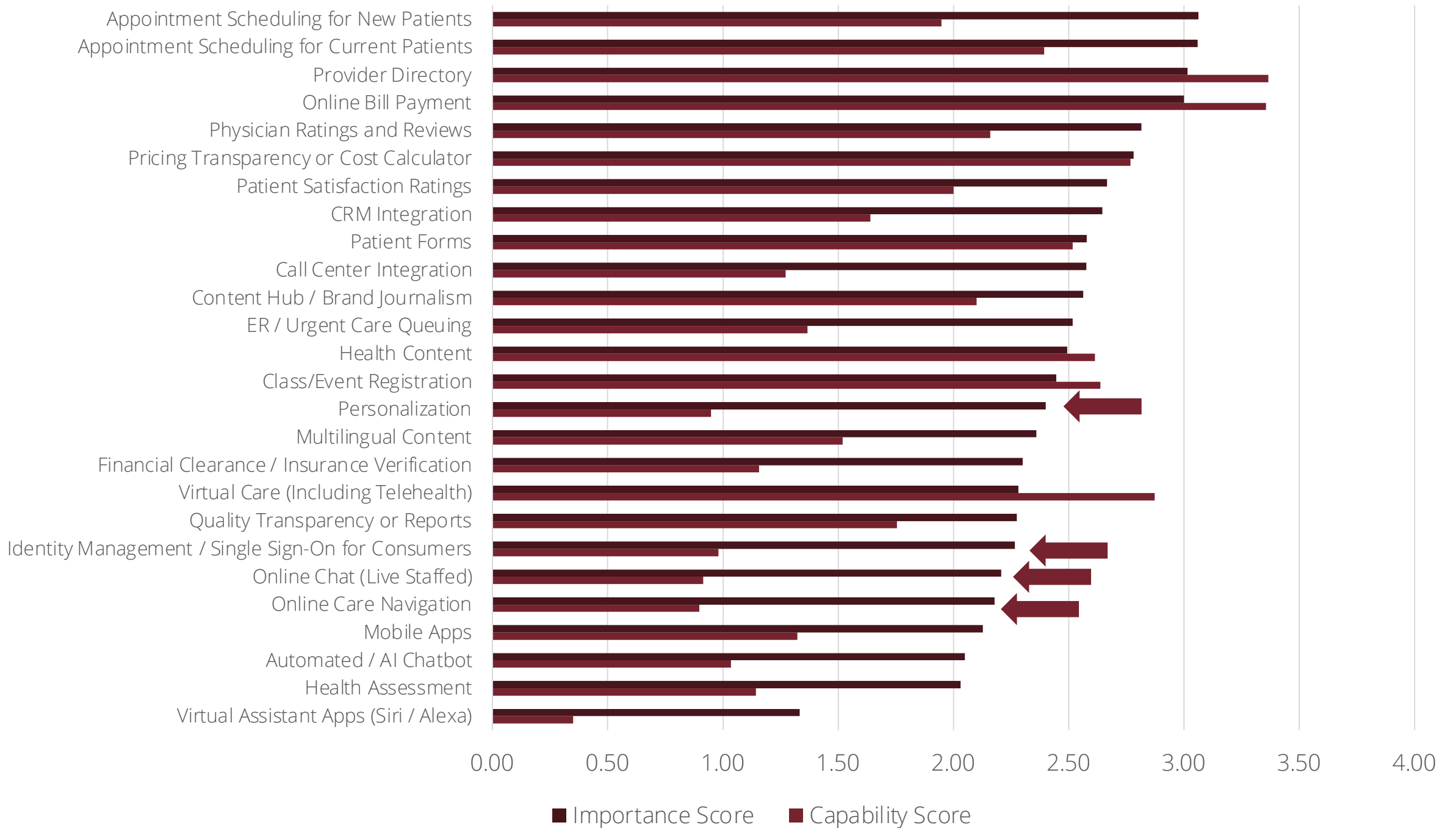


Virtual Care Pre-Pandemic vs. Now

		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%

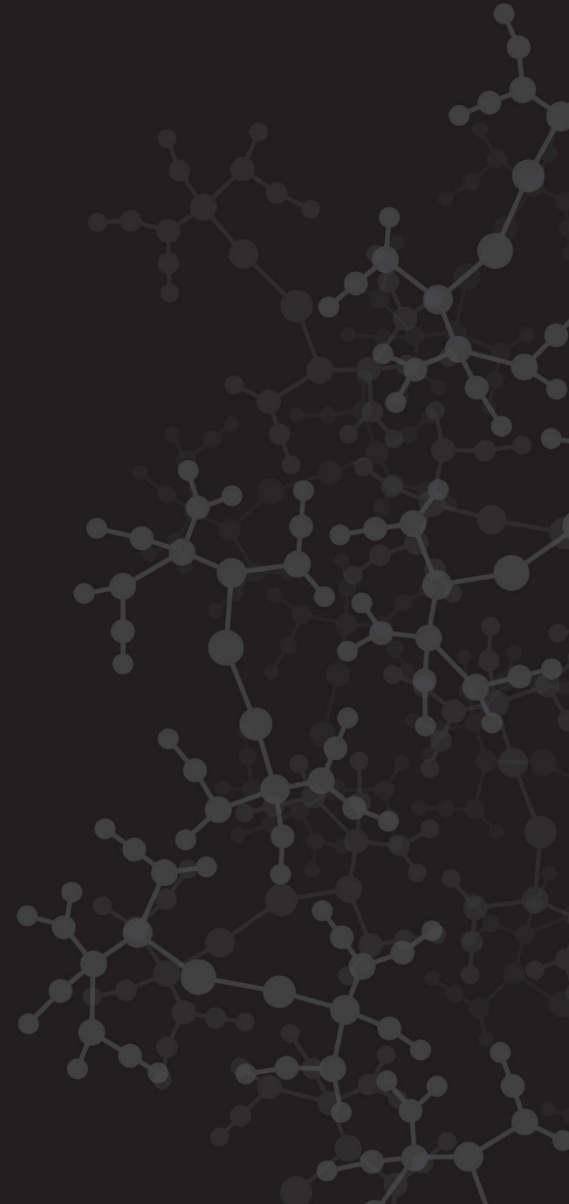
Digital Front Door — Conversion/Assessment/Triage (Scale 1-4)



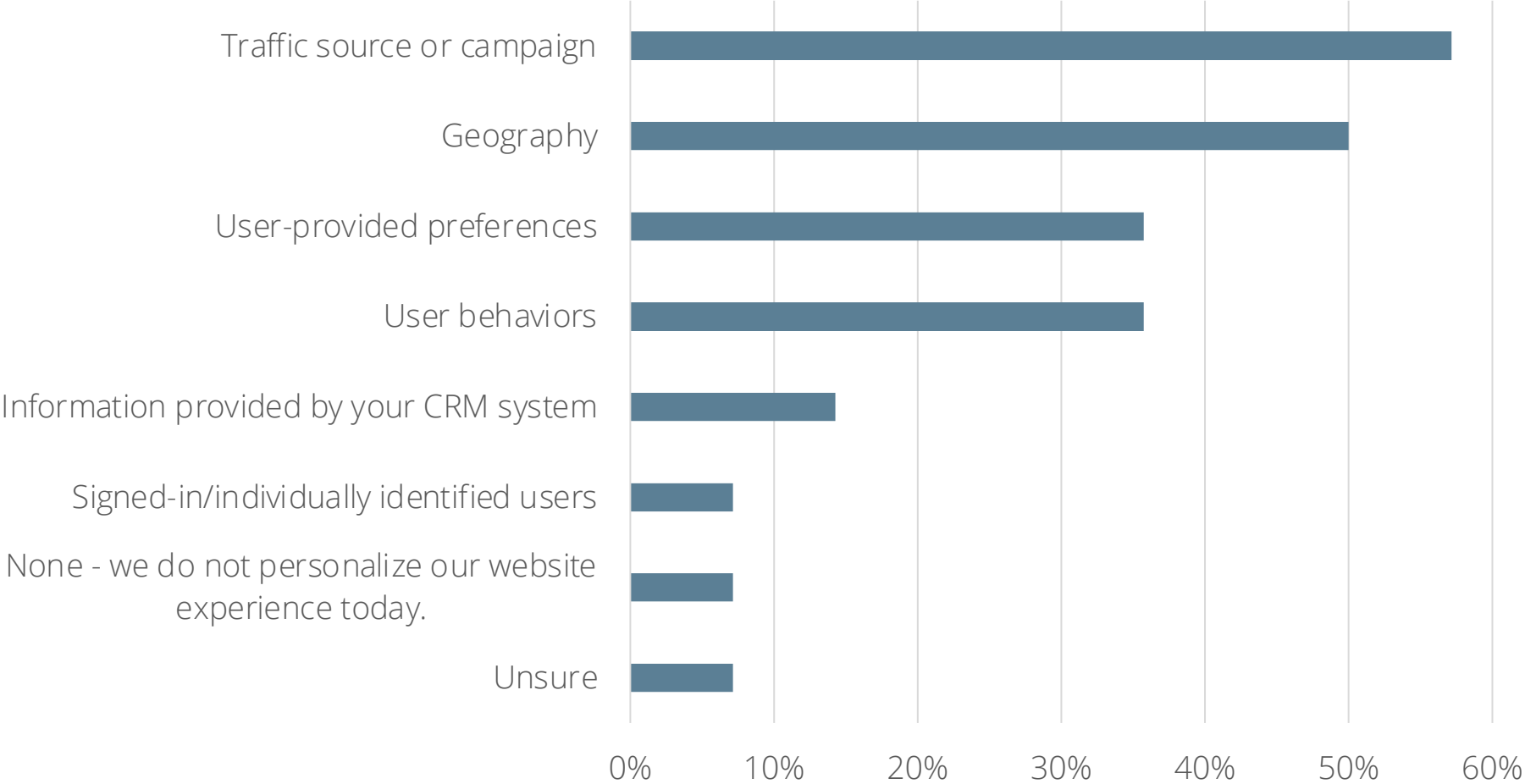




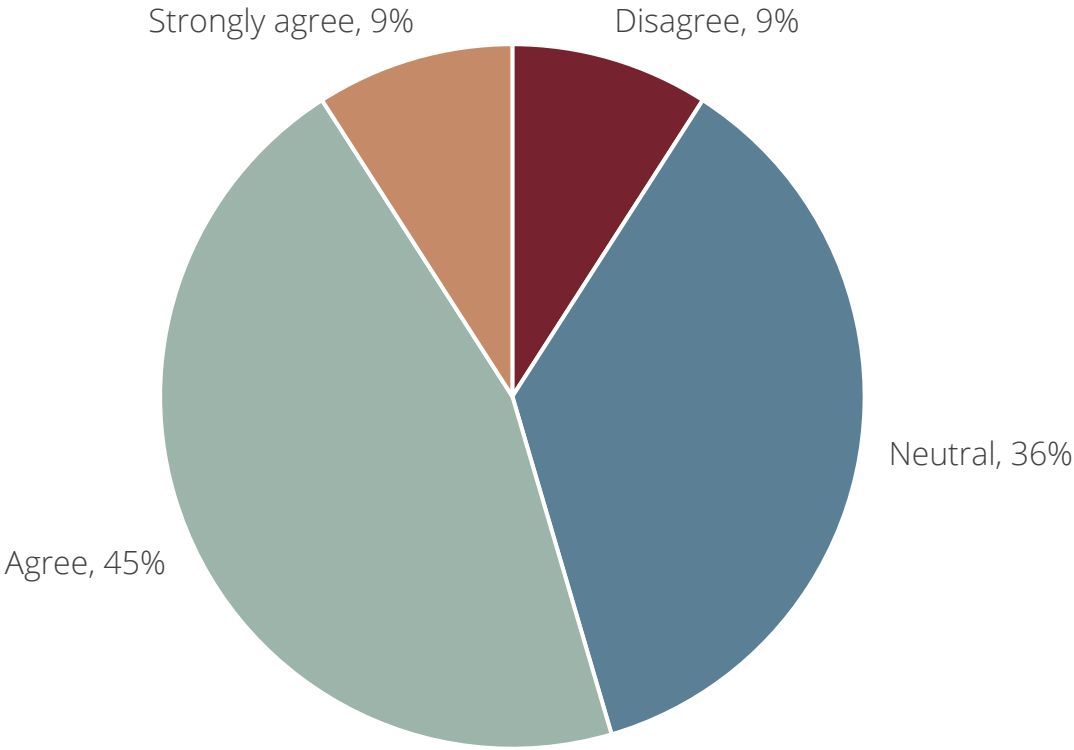
Personalization



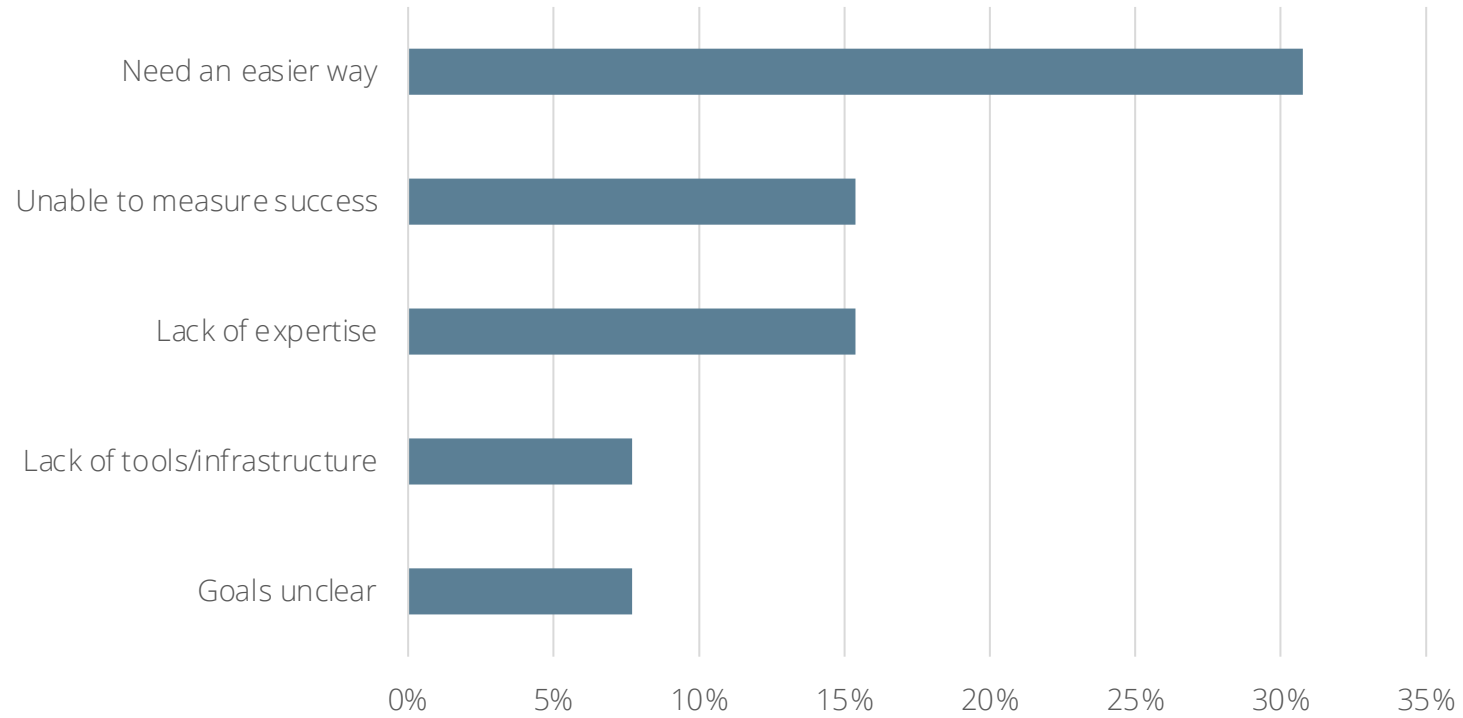
Personalization Methods Used



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

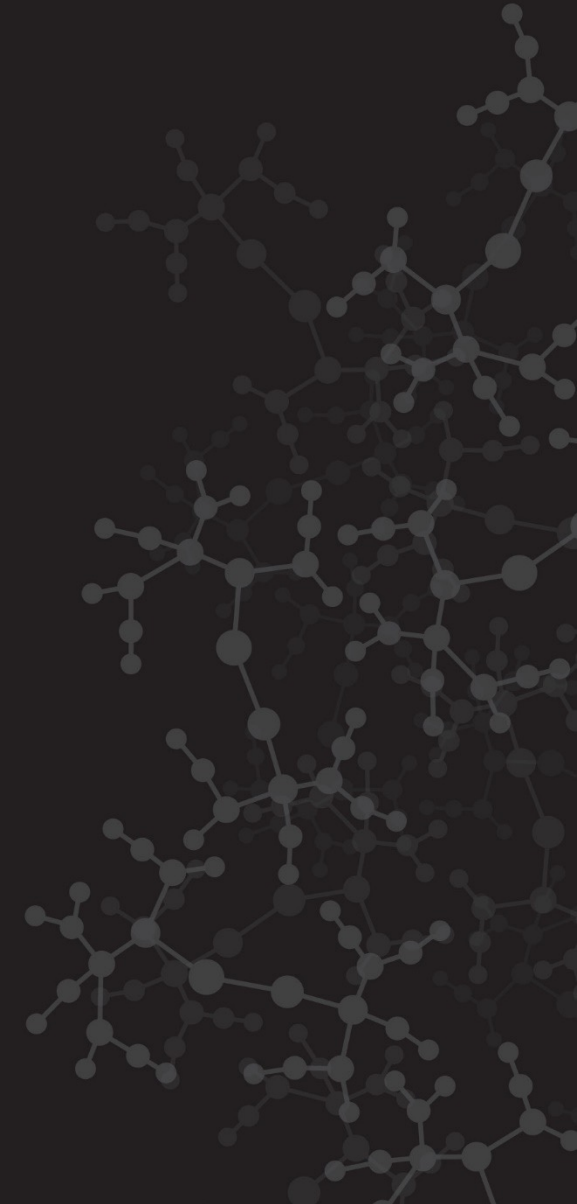


Barriers to Personalization





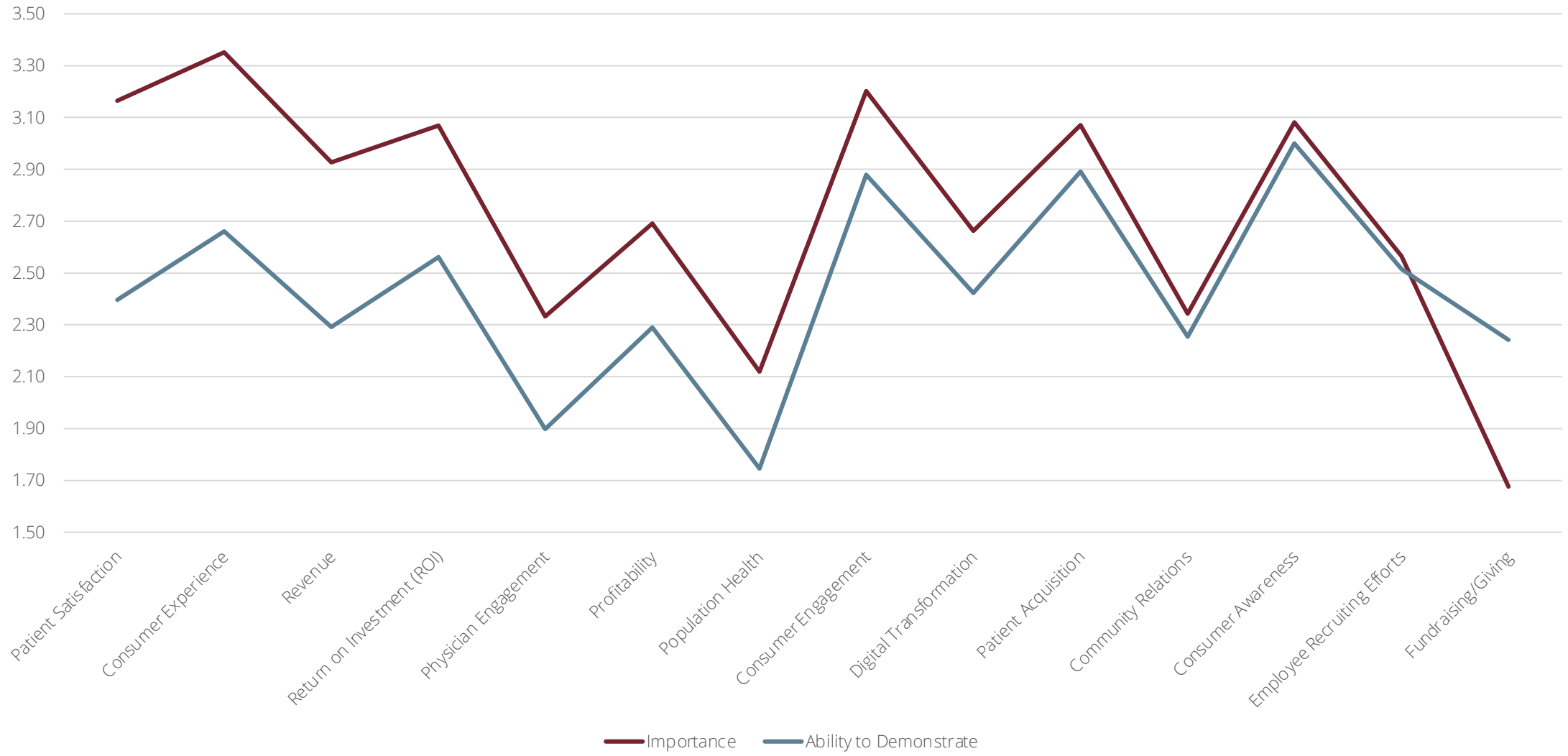
Goals and barriers



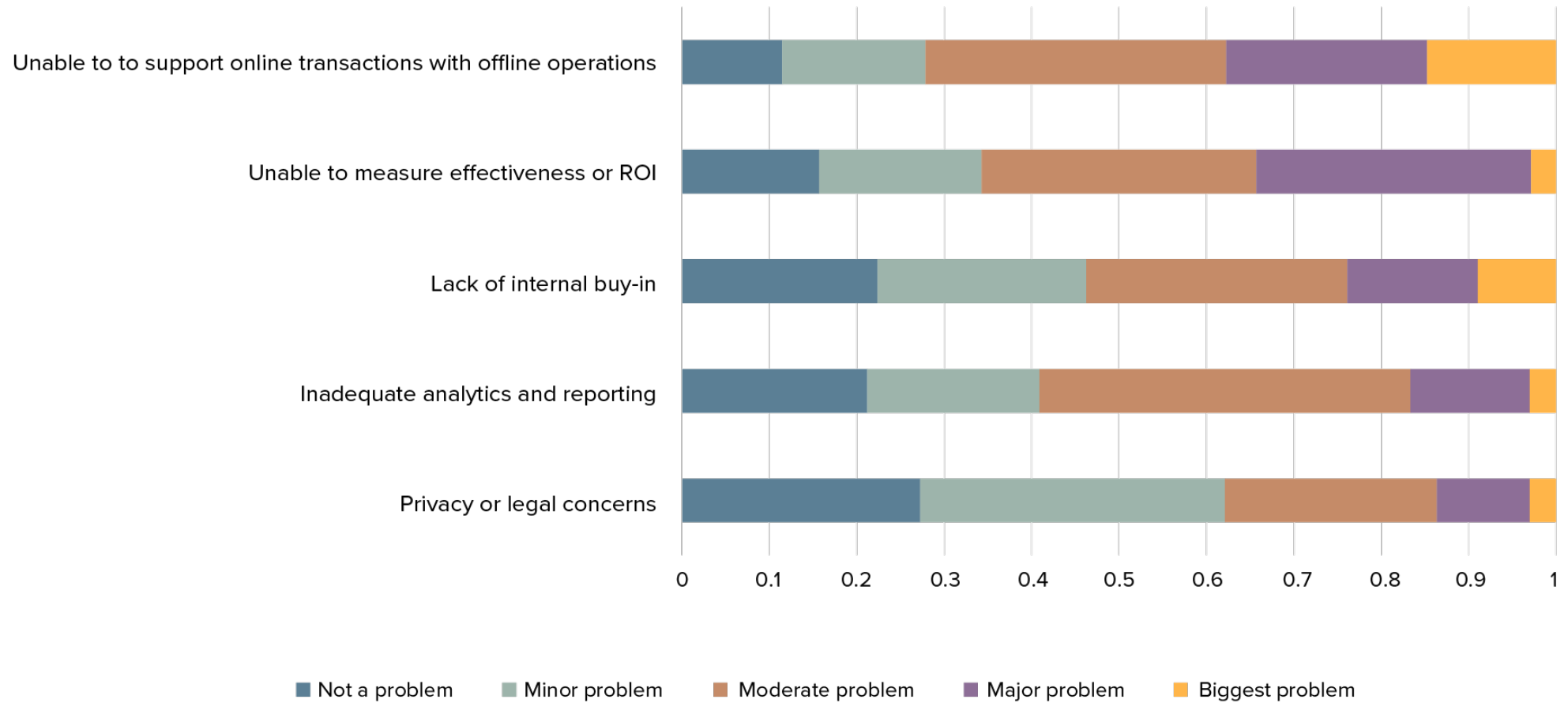
Goals: Importance	
	Scored
Consumer experience	3.35
Consumer engagement	3.20
Patient satisfaction	3.16
Consumer awareness	3.08
Patient acquisition	3.07
Return on investment (ROI)	3.07
Revenue	2.93
Profitability	2.69
Digital transformation	2.66
Employee recruiting efforts	2.57
Community relations	2.34
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?

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