

eHealthcare
STRATEGY & TRENDS

**Get the Latest Market Research Findings to Shape
Your Strategy in 2018 and Beyond**

Your Presenter



Ben Dillon

Chief Strategy Officer
Geometric

- 20 years in healthcare
- SHSMD President
- EHS&T Editorial Advisory Board Member
- Frequent speaker at industry conferences
- Twitter: @benatgeo

2018
HEALTHCARE
DIGITAL MARKETING TRENDS
SURVEY

Exclusive Sneak Peak



Survey Methodology

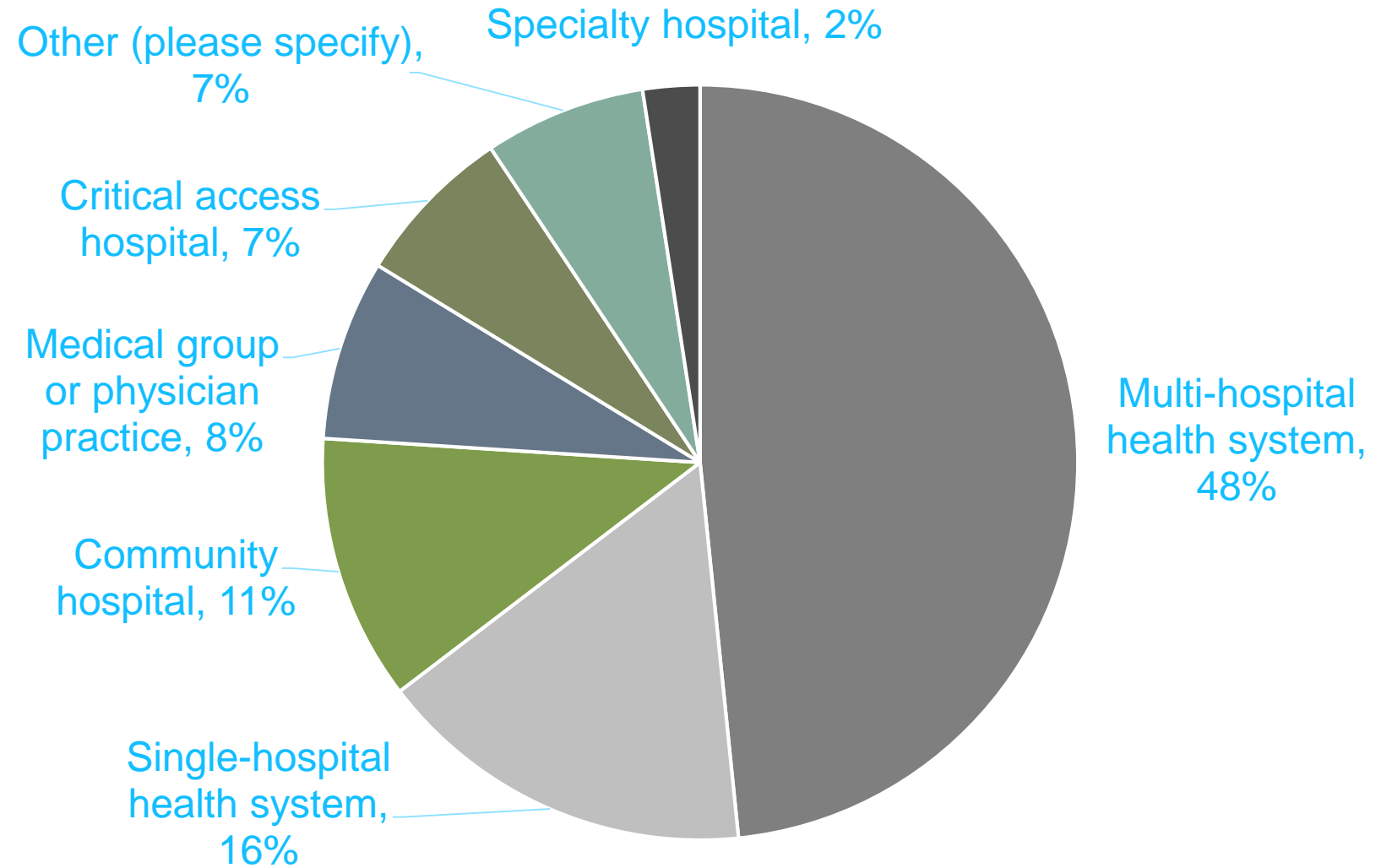
- Data Collection
- Partnership with *eHealthcare Strategy & Trends*
- Peer groups & segmentation
- Outside coding

Organization Type [Providers Only]

Responses

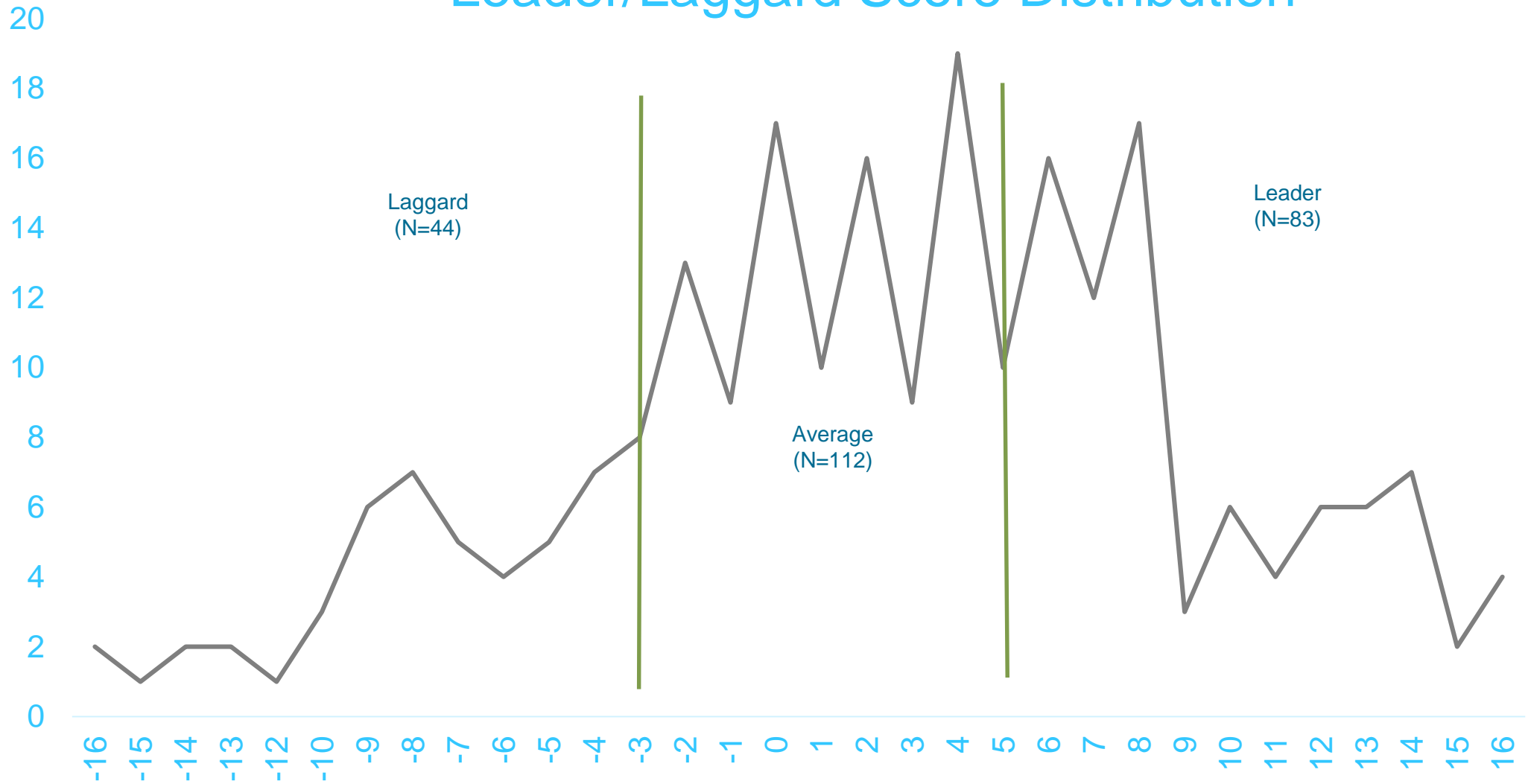
Providers 246

Vendors 47

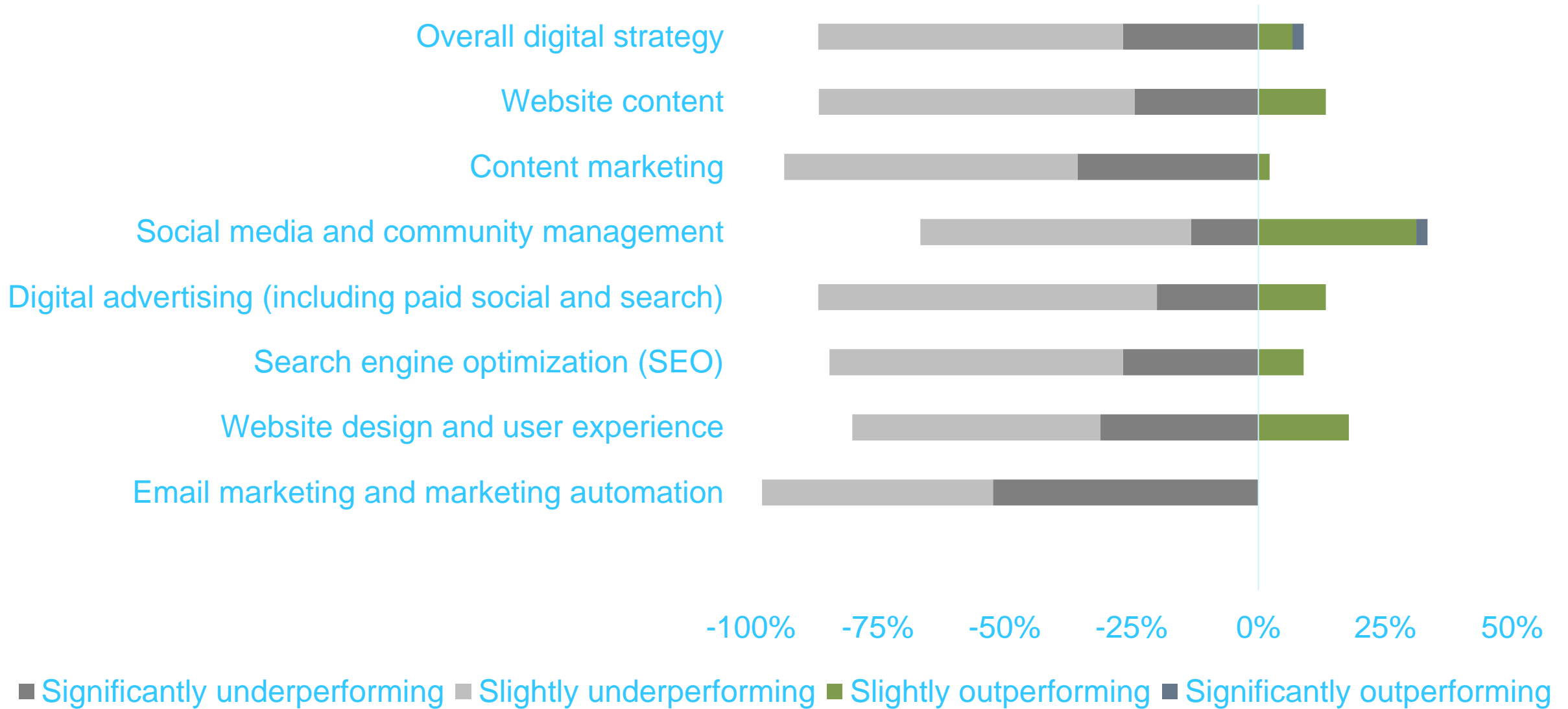


Content is Hard
The Struggle is Real

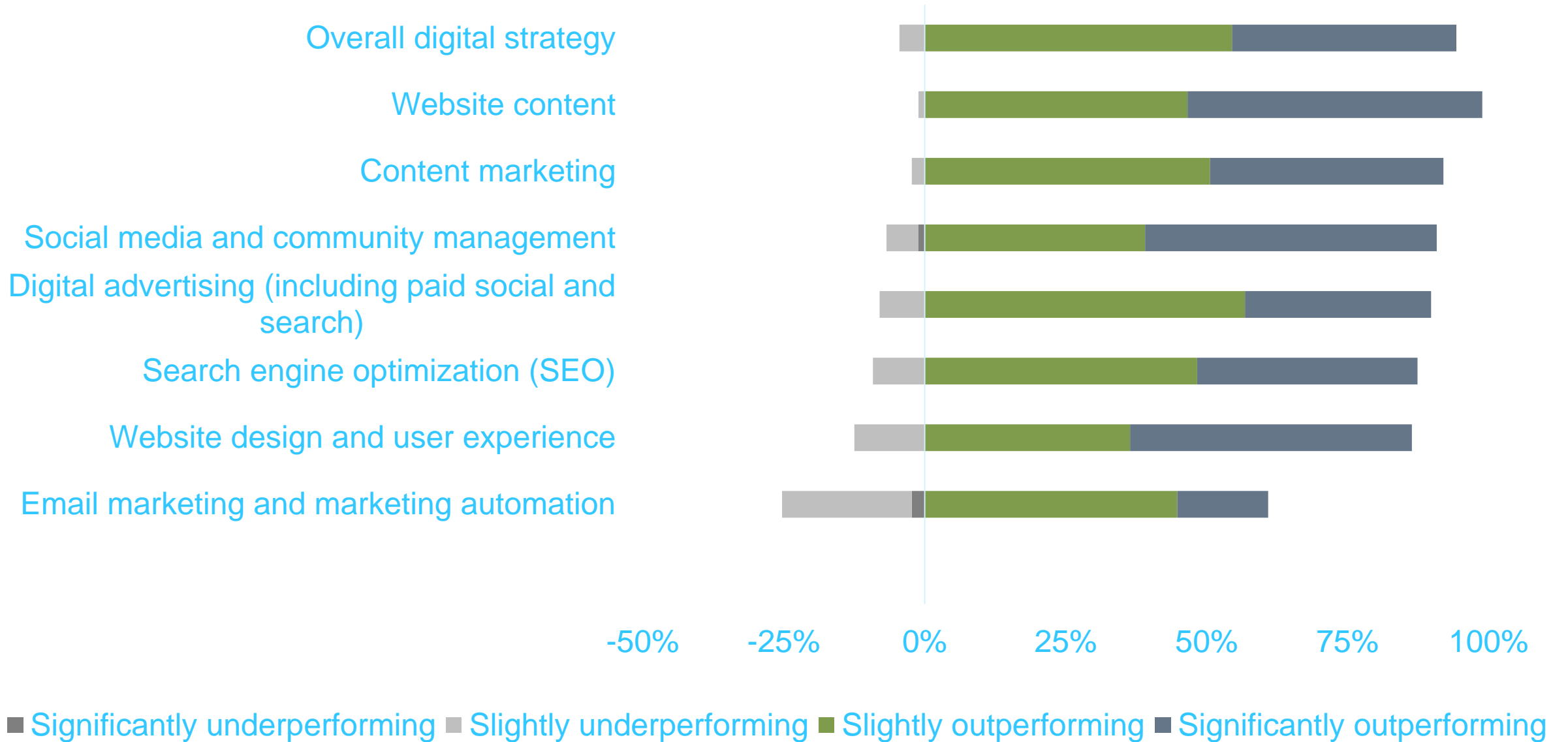
Leader/Laggard Score Distribution



Ahead/Behind - Laggards

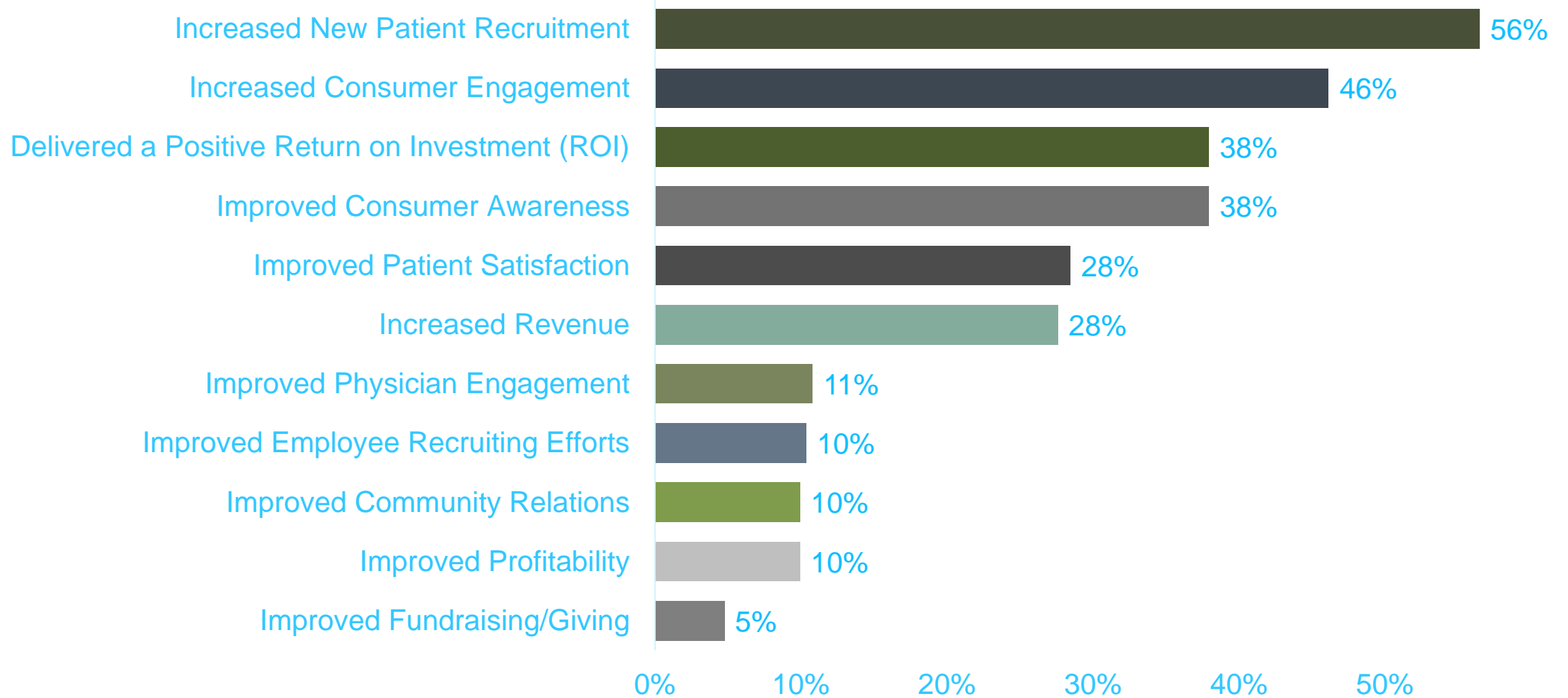


Ahead/Behind - Leaders



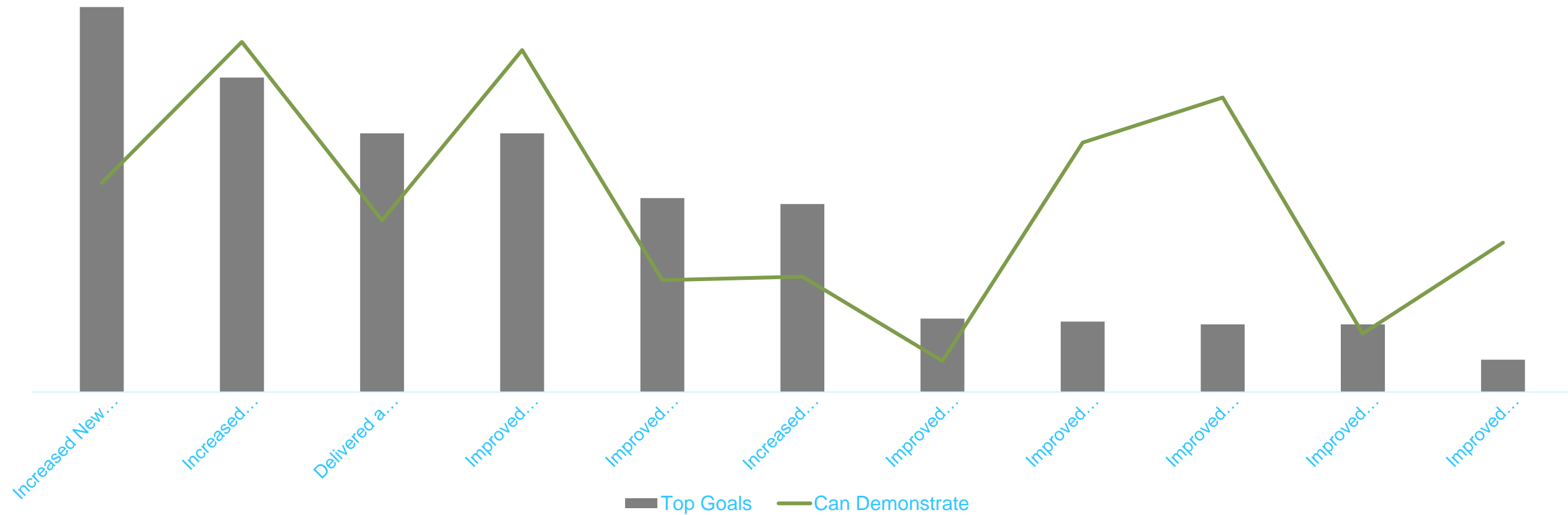
Hospitals Want Patients
But Are They Getting Them?

Top Digital Marketing Goals



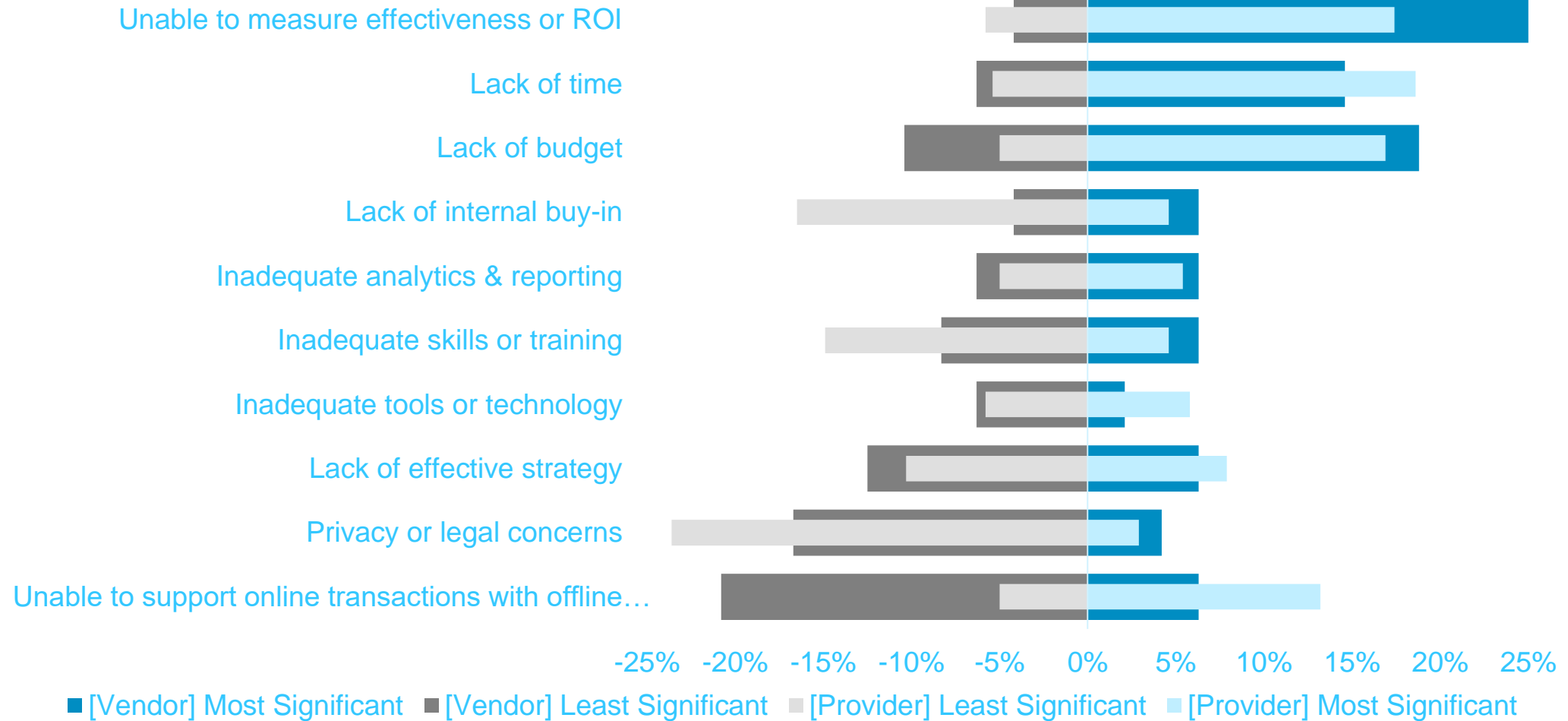
Comparing Goals with Ability to Demonstrate

Top Goals vs. Ability to Demonstrate

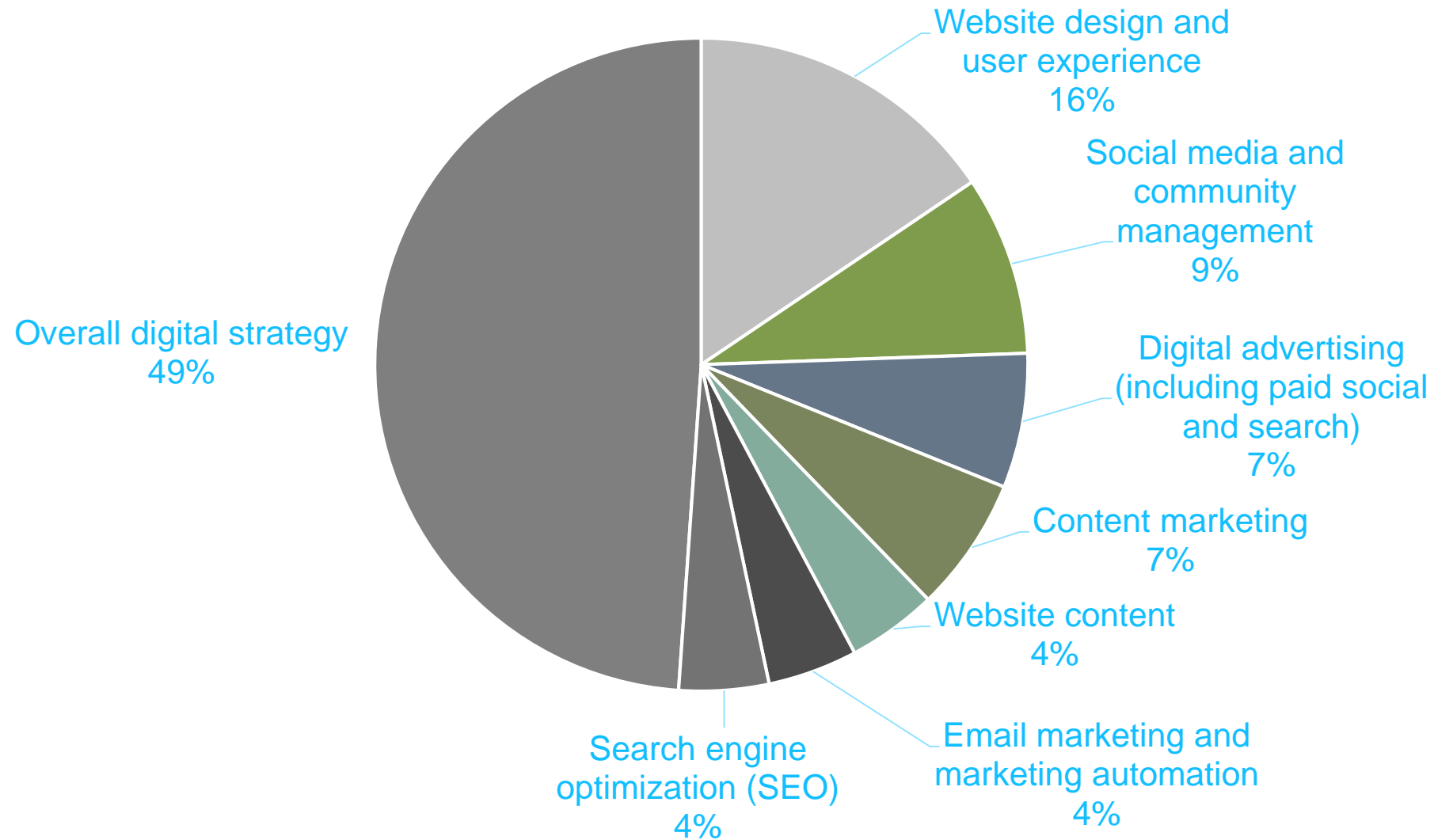


Emerging Challenges: Operational Integration & Digital Strategy

Vendor vs. Provider - Most/Least Significant Problems

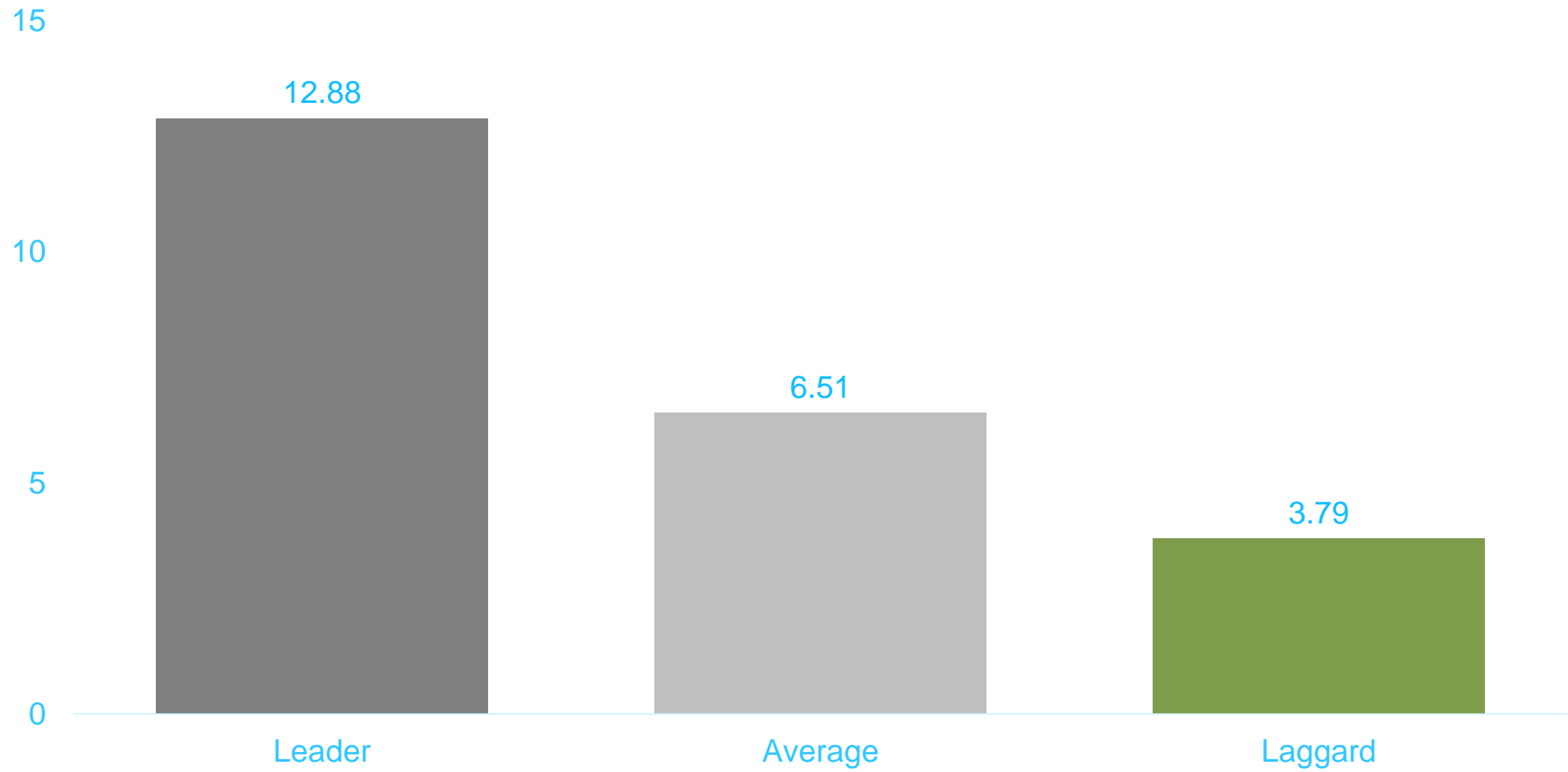


Where is Healthcare Falling Behind Other Industries? [Vendors]

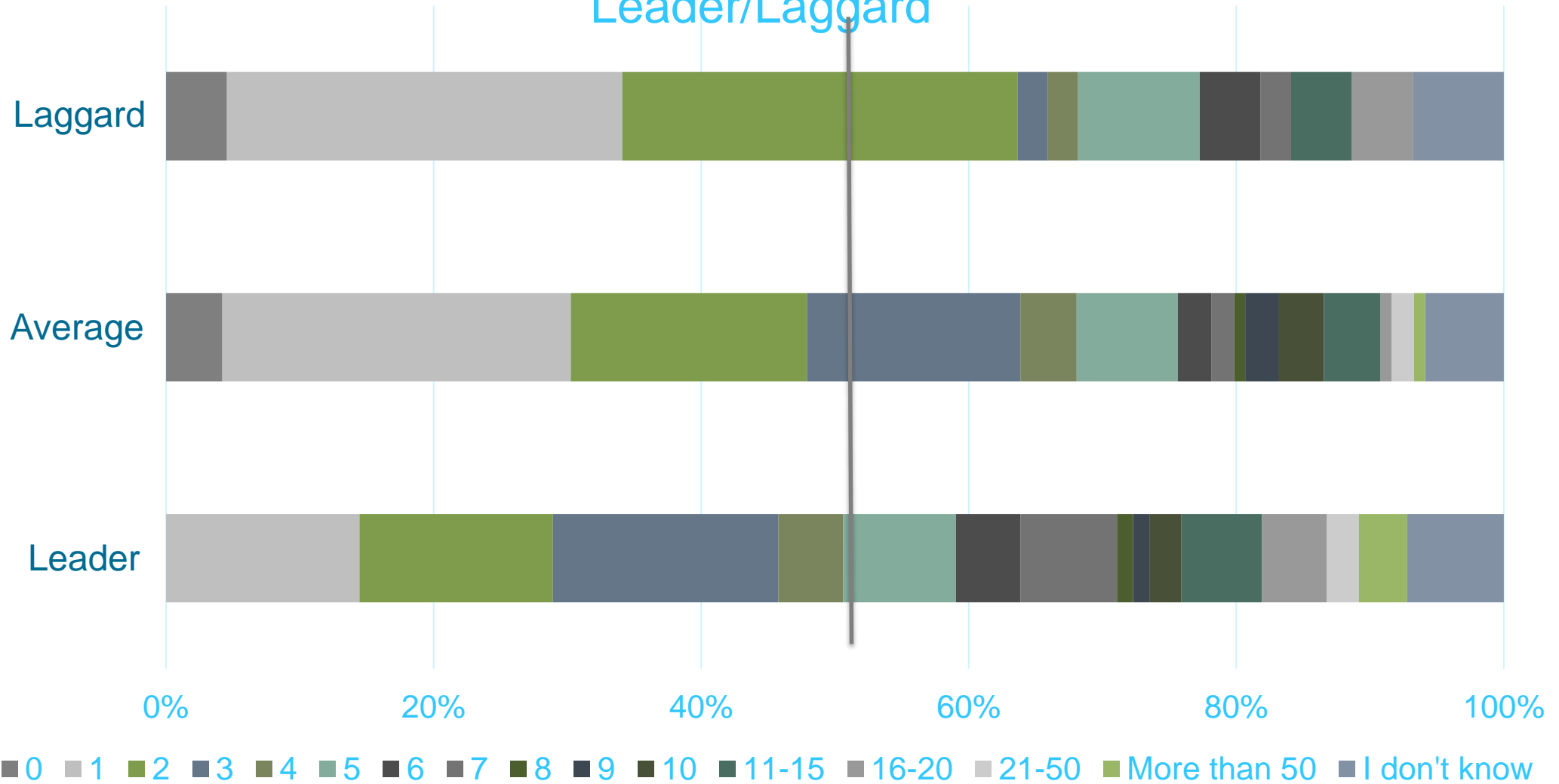


Hot Jobs in Healthcare: Content, CRM, Social, & Marketing Automation

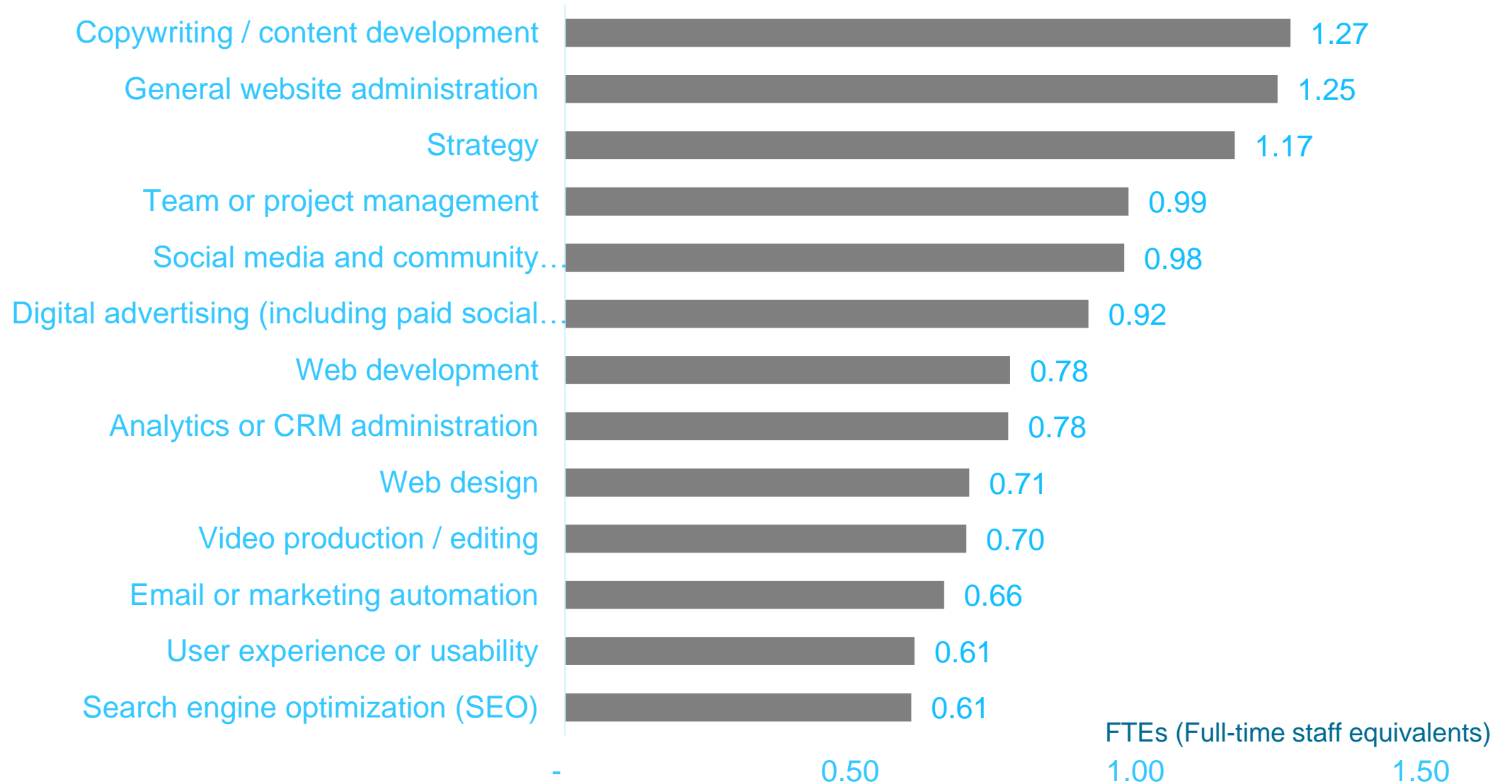
Average Digital Marketing Team FTEs



Digital Marketing Team Size Distribution by Leader/Laggard



FTEs By Role

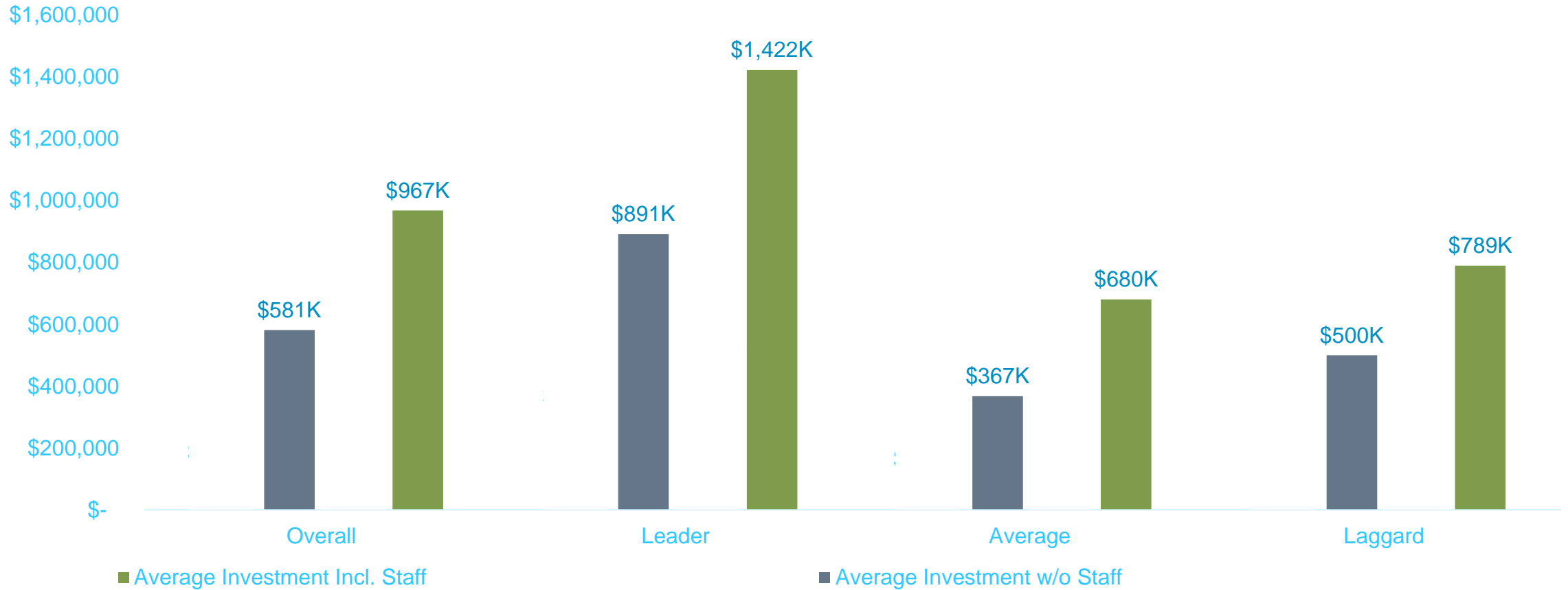


Roles with Greatest Planned Investment Growth

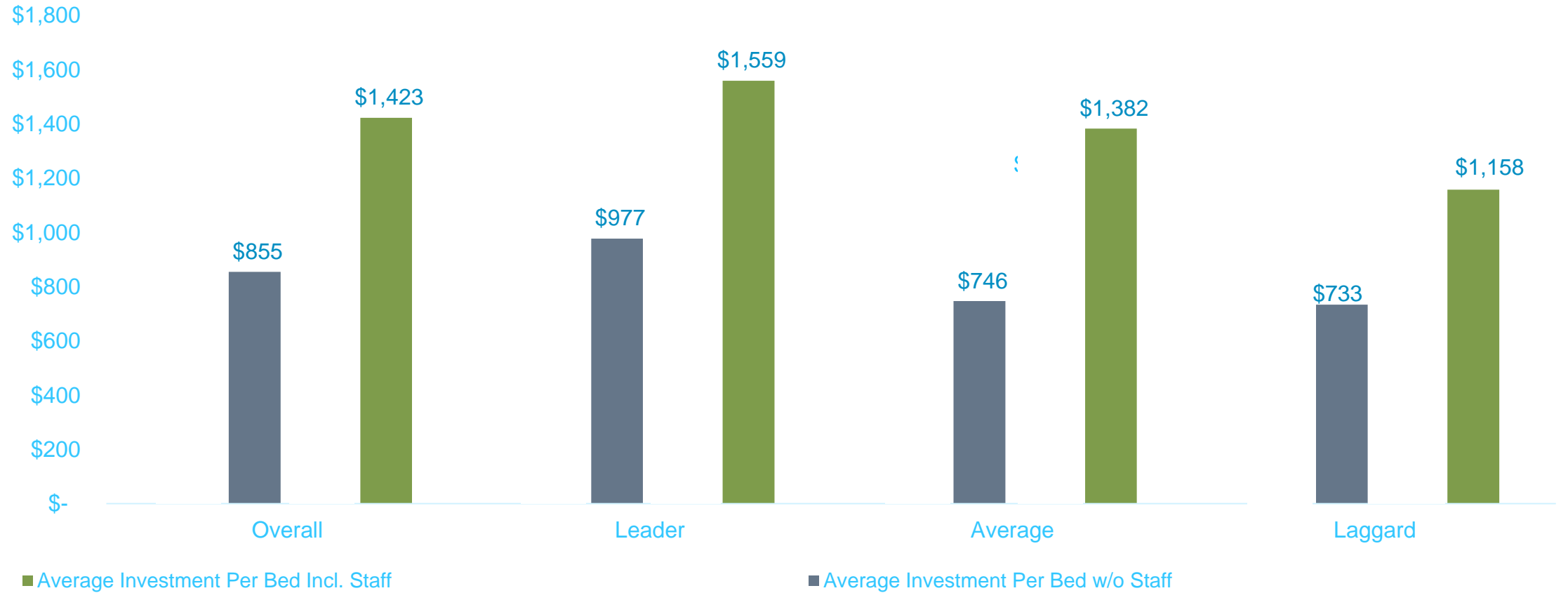
	Copywriting / content development	Analytics or CRM administration	Social media and community management	Email or marketing automation
Avg FTE	1.27	0.78	0.98	0.66
Expected net staff growth	16%	14%	11%	11%
Insourcing ("none" or "a little")	62%	50%	82%	67%
Outsourcing ("all" or "most")	8%	23%	4%	12%
Insufficient 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

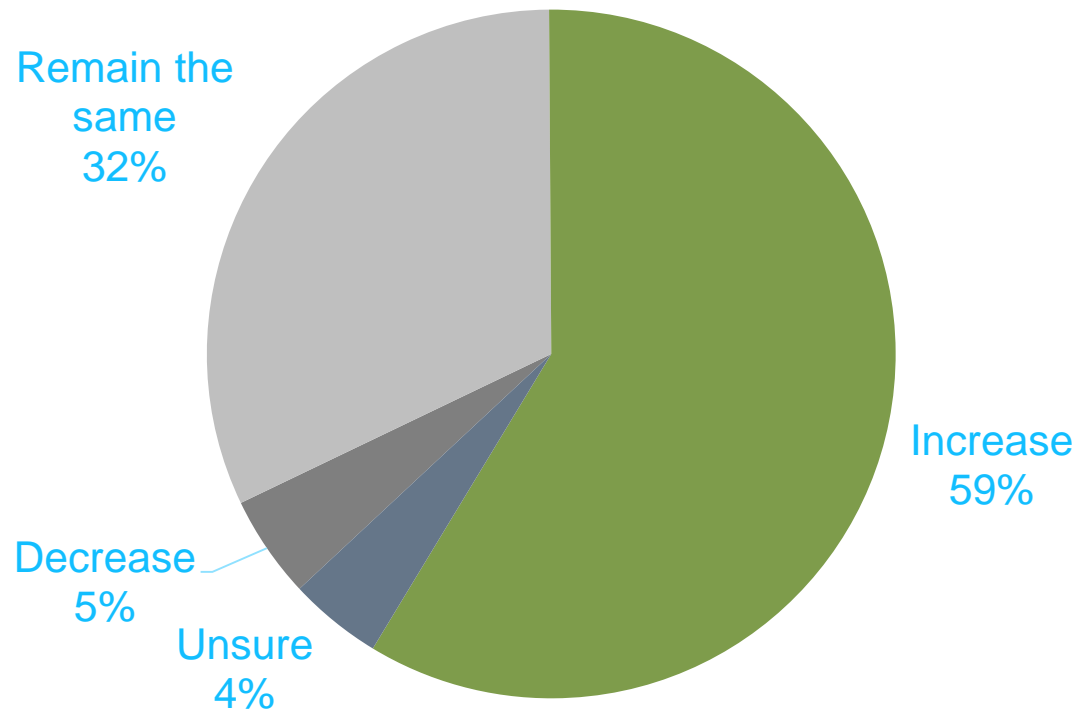


Annual Digital Investment per Bed

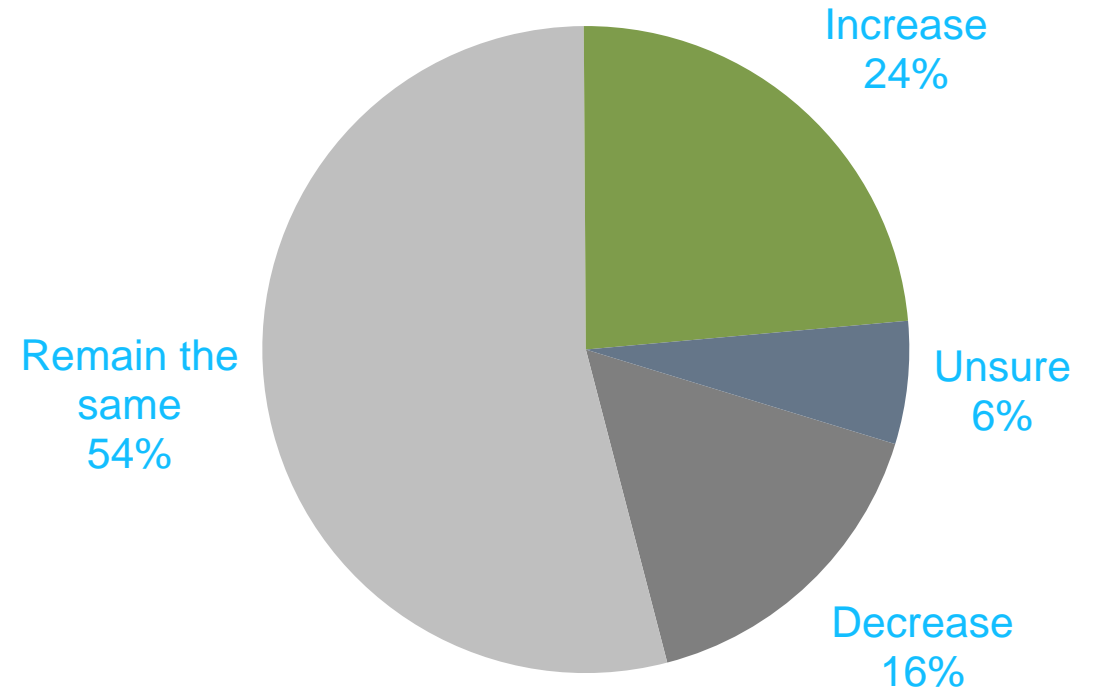


Budget Changes

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



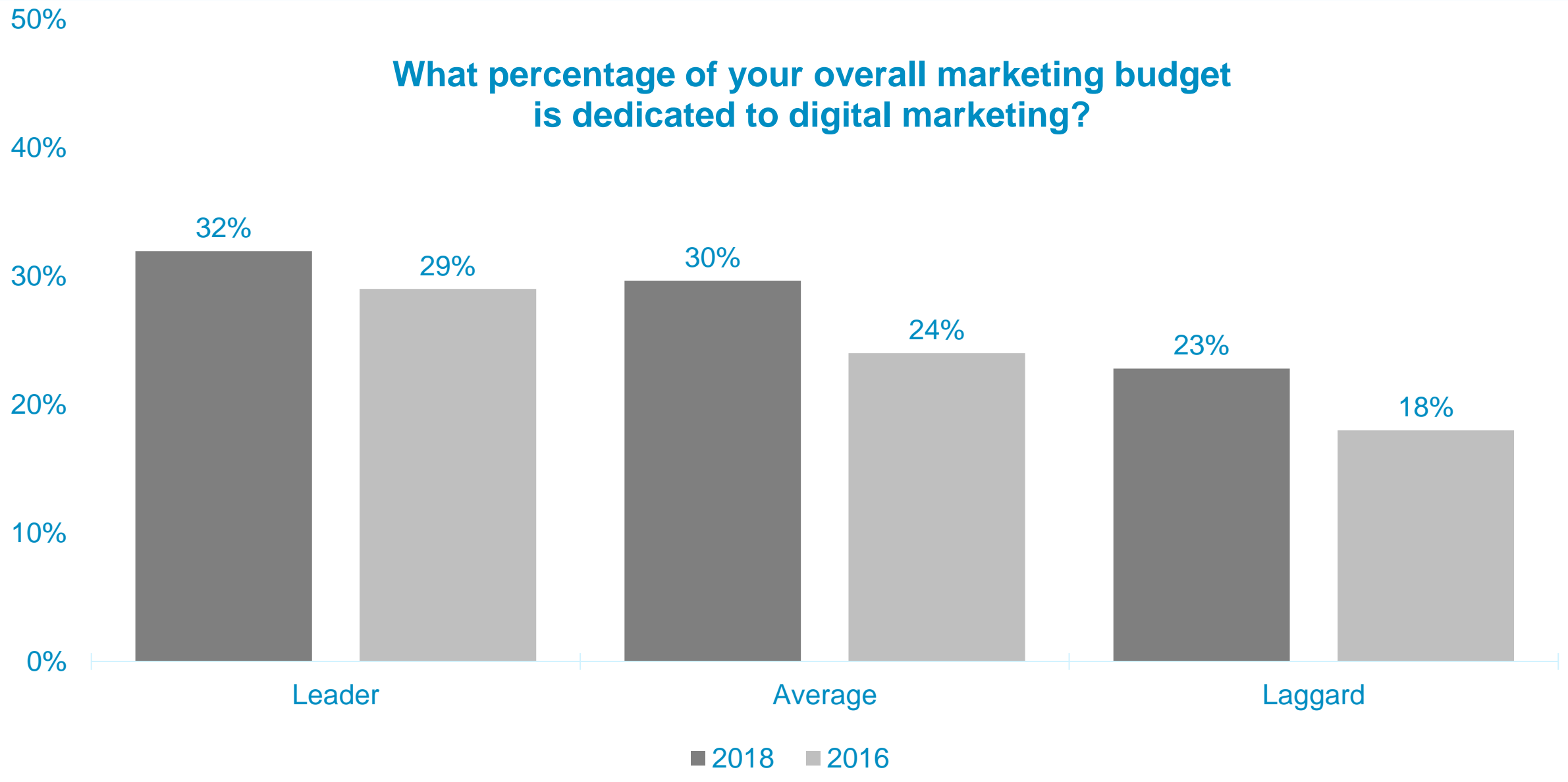
What do you expect to happen to your **overall marketing budget** in the next 12 months?



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%

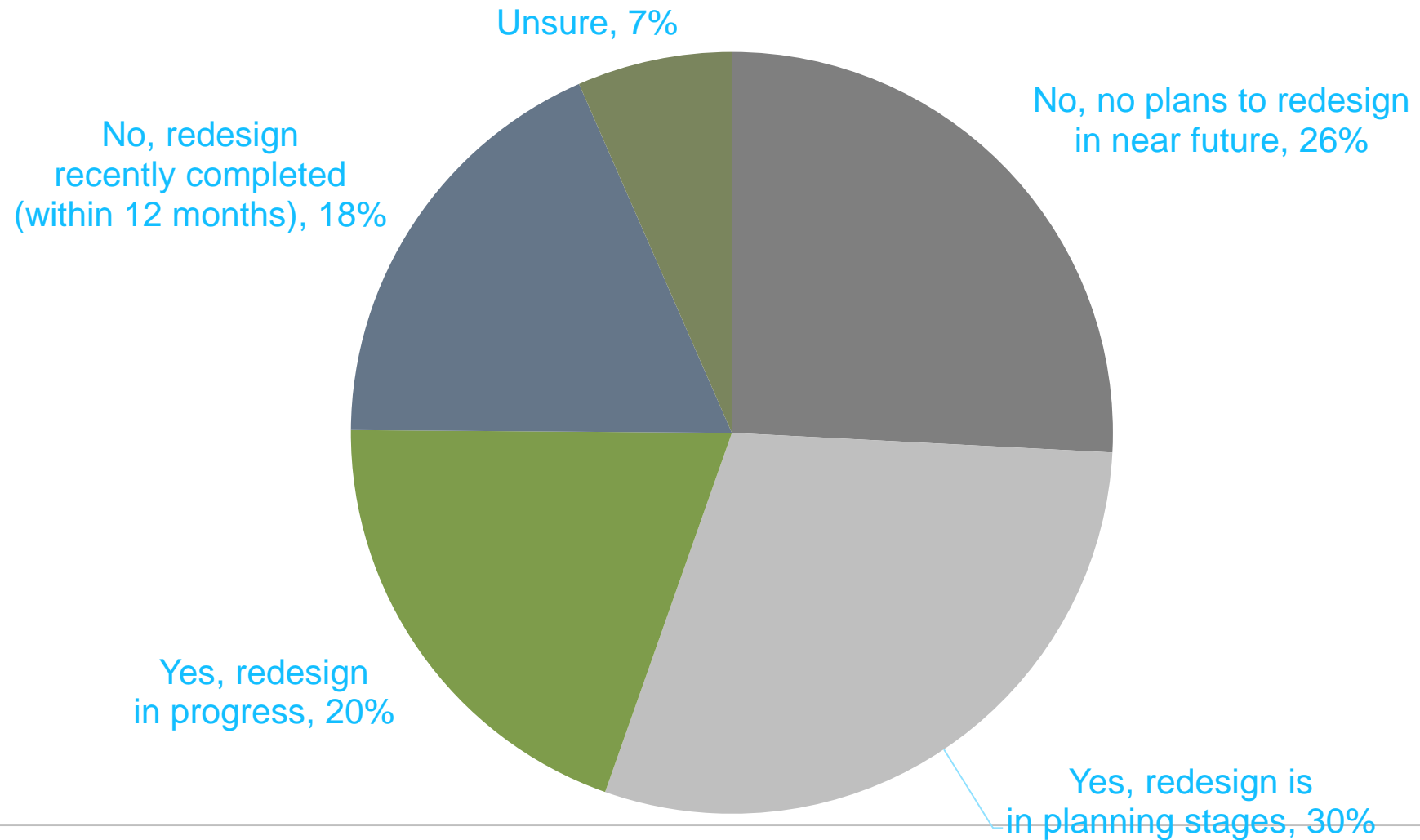
What percentage of your overall marketing budget is dedicated to digital marketing?



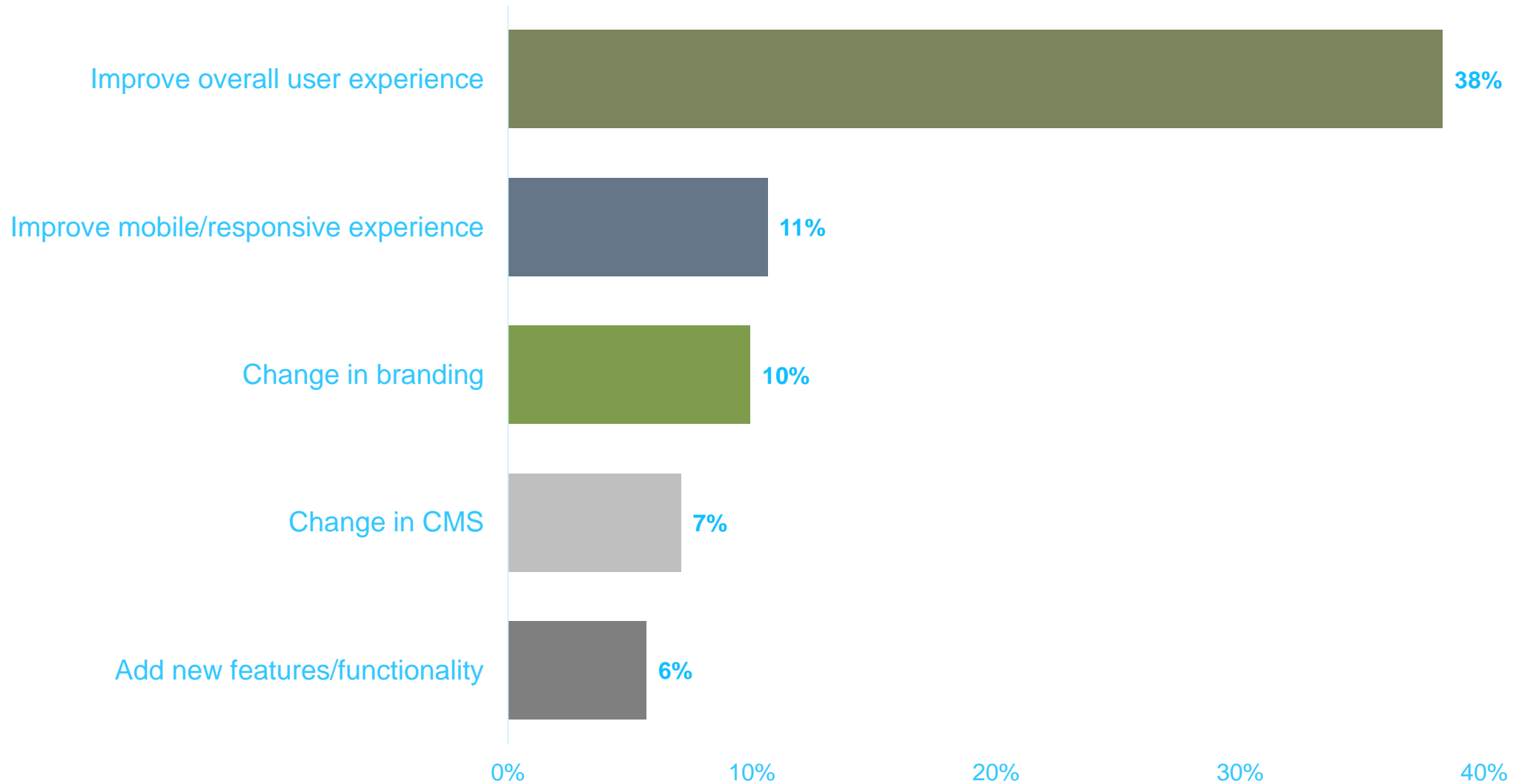
Redesign Cycle

Picking Up Steam

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



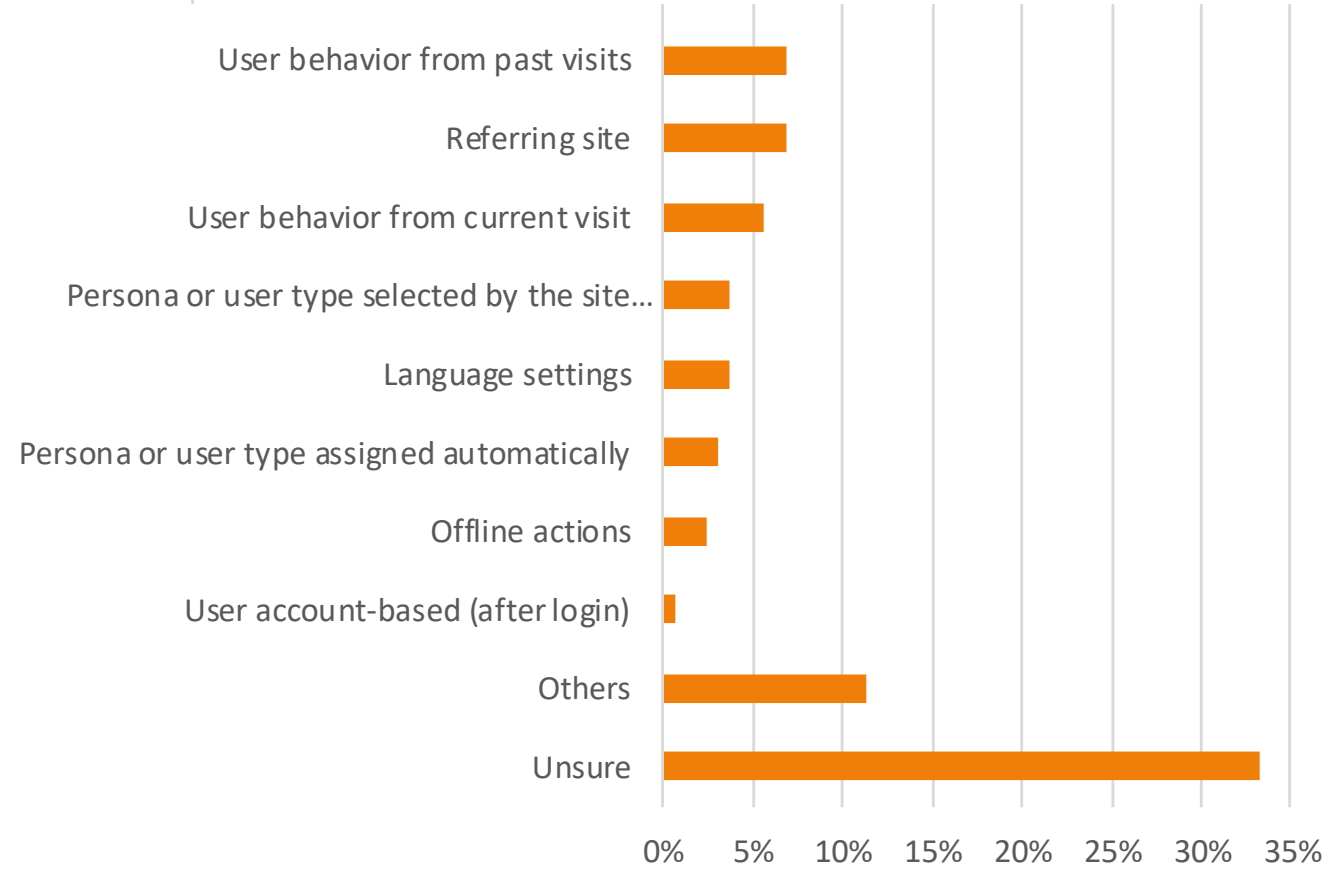
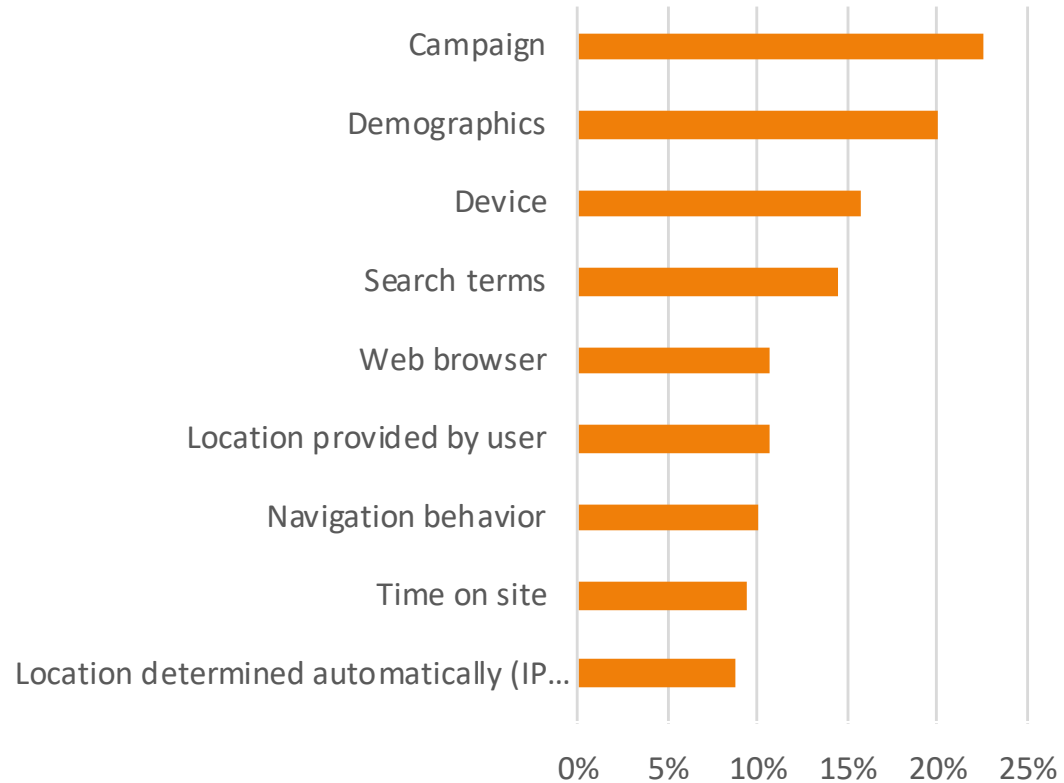
Primary Motivation for Redesign



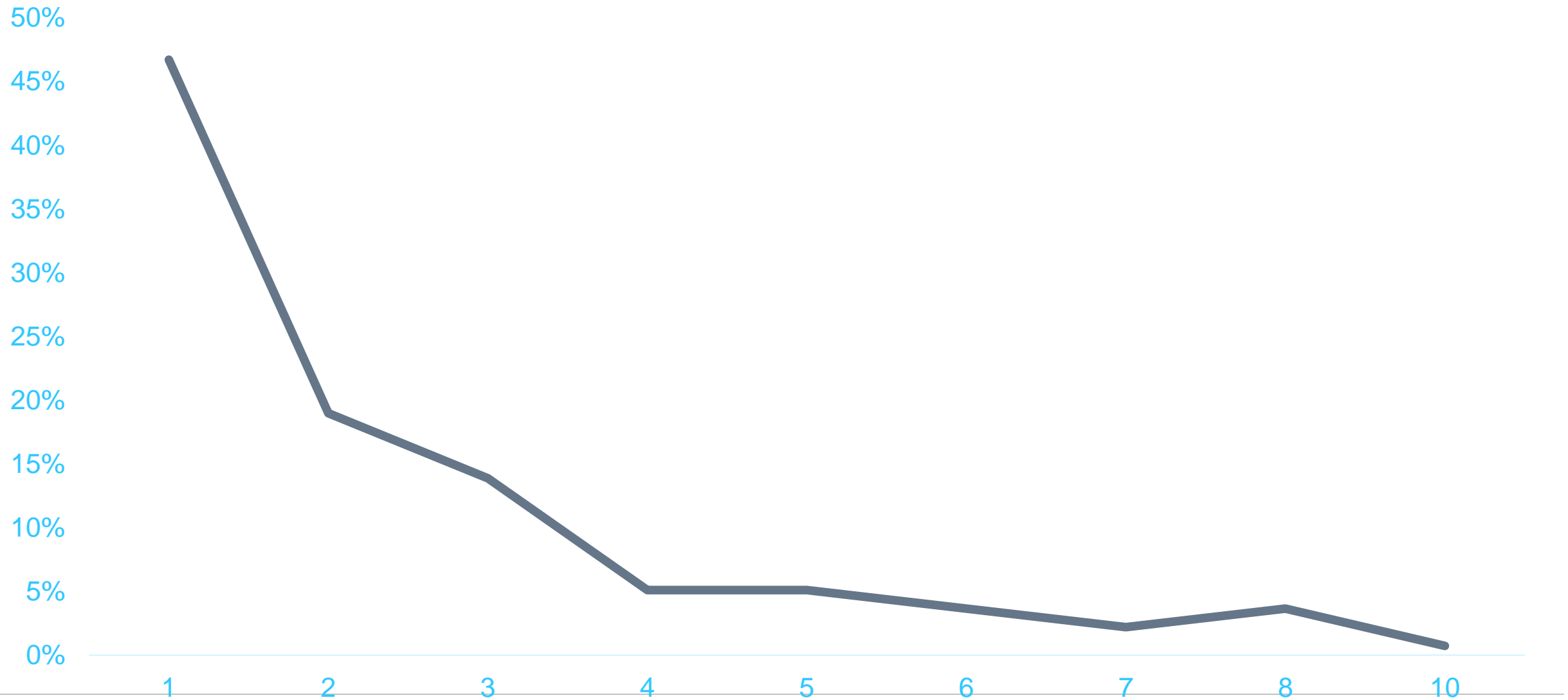
Personalization

Opportunities and Challenges

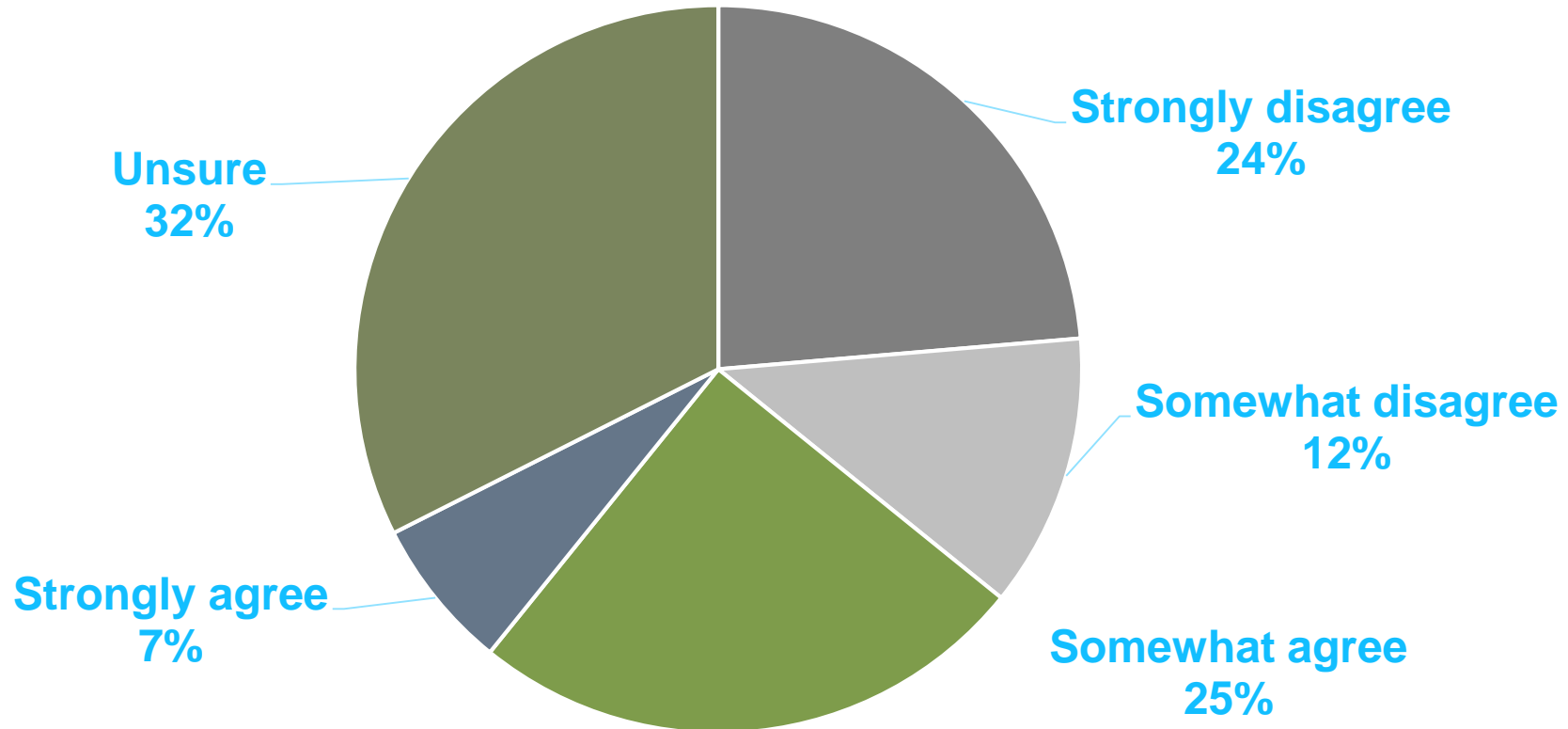
Methods Used for Website Personalization



Number of Personalization Methods Used

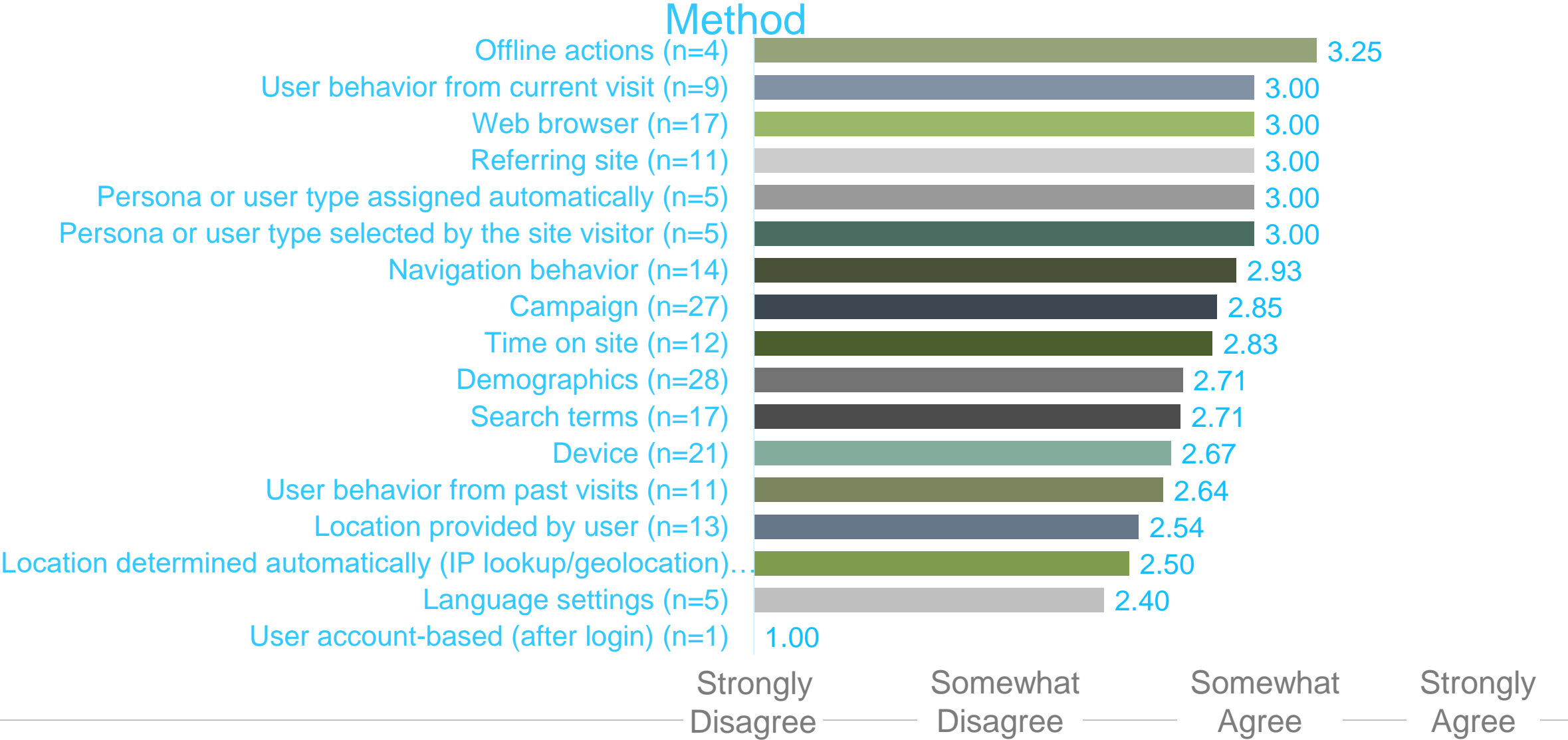


Our organization can demonstrate that website personalization has improved the performance of our digital marketing.



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

Able To Demonstrate Personalization Value by Personalization



Closing Thoughts

Takeaways

- Every organization needs content strategy AND a content execution plan.
 - Every initiative requires a plan for measuring success.
 - The number of things that your digital marketing group will be responsible for is growing. That's not going to change. Plan for it.
 - New, cutting edge stuff is hard. If it wasn't hard, everyone would be doing it. If you want to be at the leading edge, you need to jump in anyway and be ok with "the pivot."
-

eHealthcare

STRATEGY & TRENDS

Digital Marketing Budgets

It's important to understand what other healthcare organizations are spending on digital marketing to benchmark your efforts. As you'll see in this section:

- Median annual digital marketing investments are between \$50,000 and \$100,000, with a few outliers pulling the average annual investments much higher.
- Leaders outpace their counterparts, with 13% of leaders spending over \$1 million on digital marketing annually.
- Overall, 59% of respondents expect their digital marketing budgets to increase in the next 12 months, with only 5% expecting a decrease in digital budgets.
- More than half (54%) of digital budgets are growing in organizations where overall budgets are remaining the same, continuing the trend from previous years of investment shifting from traditional to digital.

Average Annual Investment

Leaders slightly outpace their average counterparts, with 13% of leaders spending over \$1 million on digital marketing annually. Almost half of laggards report spending \$50,000 or less on digital marketing. Budgets at the high end (come up to \$20 million) pull the average up. While mean budgets for the respondents range from \$461,000 to \$841,000, median budgets are only between \$50,000 and \$300,000.



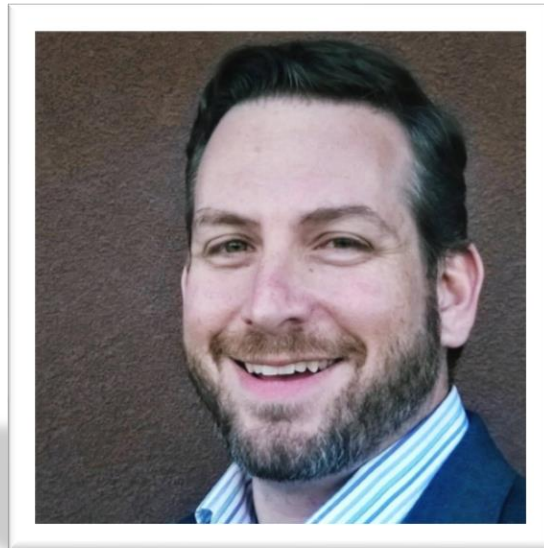
Average Annual Investment Per Bed

The investment for leaders is roughly three times that of other groups at \$1.4 million. This is, in part, because of the large size of those organizations. Looking at investments on a per bed basis helps to even the playing field. Through this lens there is a clear correlation between greater investment per bed and greater investment in digital efforts. Also interesting to note this year is that average organizations, in contrast, are trying to close the gap with leaders by adding additional resources rather than greater investment in tools and outside partners.



QUESTIONS?

Thank You!



Contact Ben

- www.geonetric.com
- ben.dillon@geonetric.com
- Twitter: @benatgeo

- Visit us in Salt Lake City at HMPS 2018!