

The State of Digital Marketing in Healthcare in 2015

Industry Perspective: Where We Are, Where We're Headed



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WHITE PAPER
NOVEMBER 2015

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Introduction

2015 Healthcare Digital Marketing Survey

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While much research has been conducted on digital marketing, most has been focused on industries other than healthcare. To remedy this, Greystone.Net and Klein & Partners conducted a survey of industry leaders to assess the current state of digital marketing in the healthcare space.

The survey was sponsored by Sitecore.



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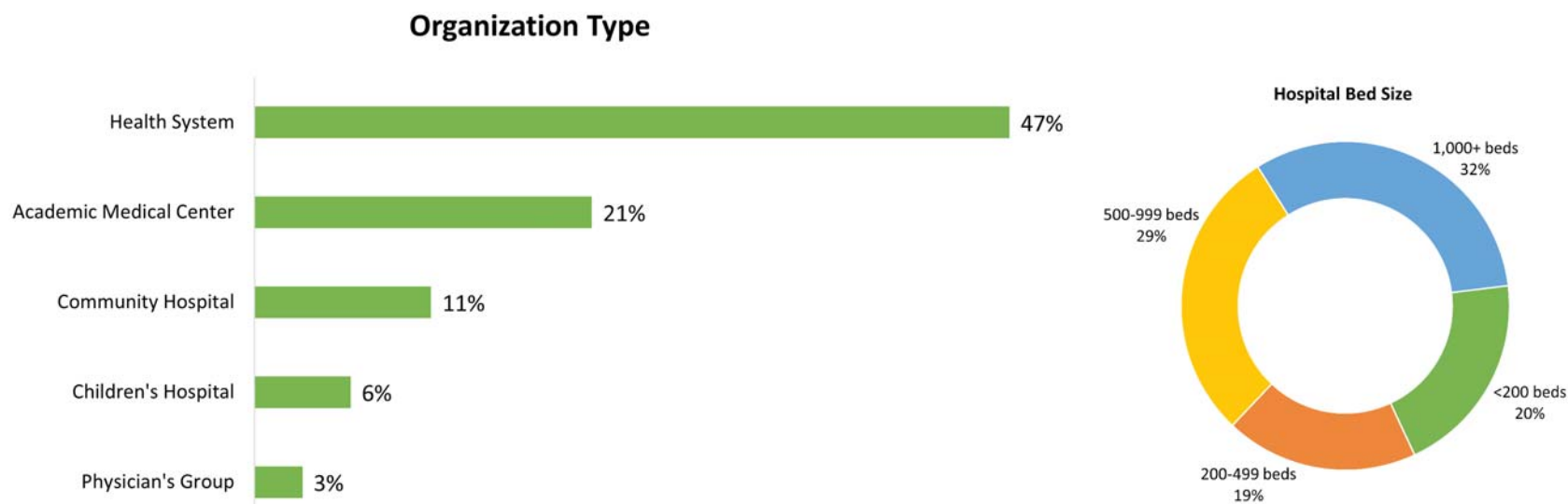
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The survey, comprised of 54 questions, was designed to probe healthcare organizations about:

- The scope of their digital and Web activities
- The importance and effectiveness of their digital marketing efforts
- Their planned future Web activities and challenges
- Their marketing resources.

The survey was deployed via an online tool and was promoted to healthcare marketers for three weeks. The survey was completed by 218 senior healthcare marketers and digital professionals from 37 states, plus the District of Columbia and the Virgin Islands.

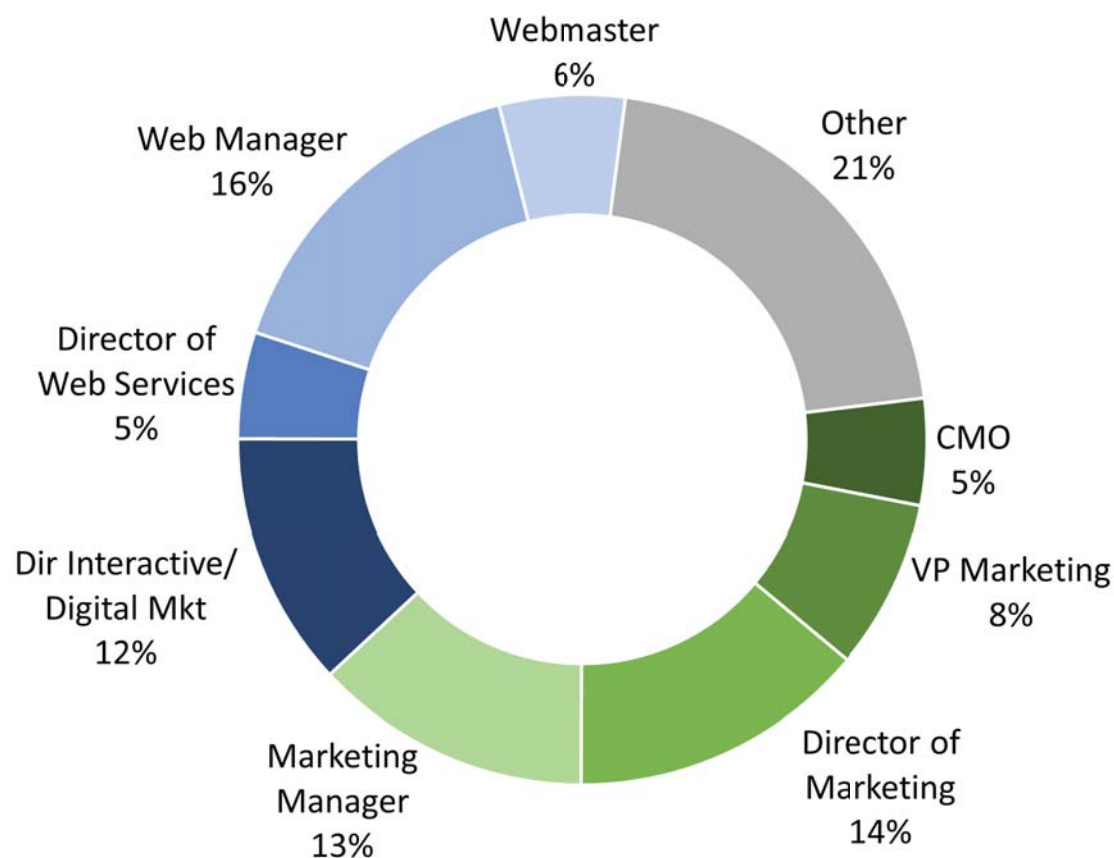


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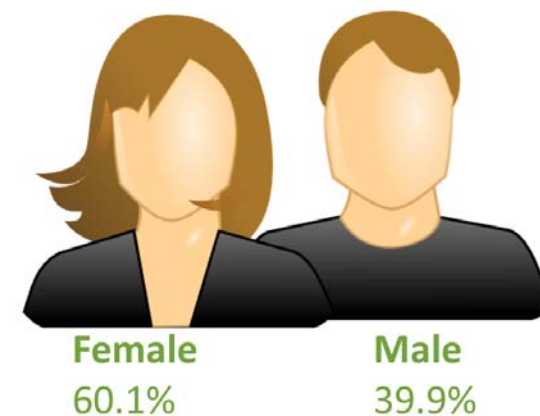
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Respondents' Titles



Respondents' Gender

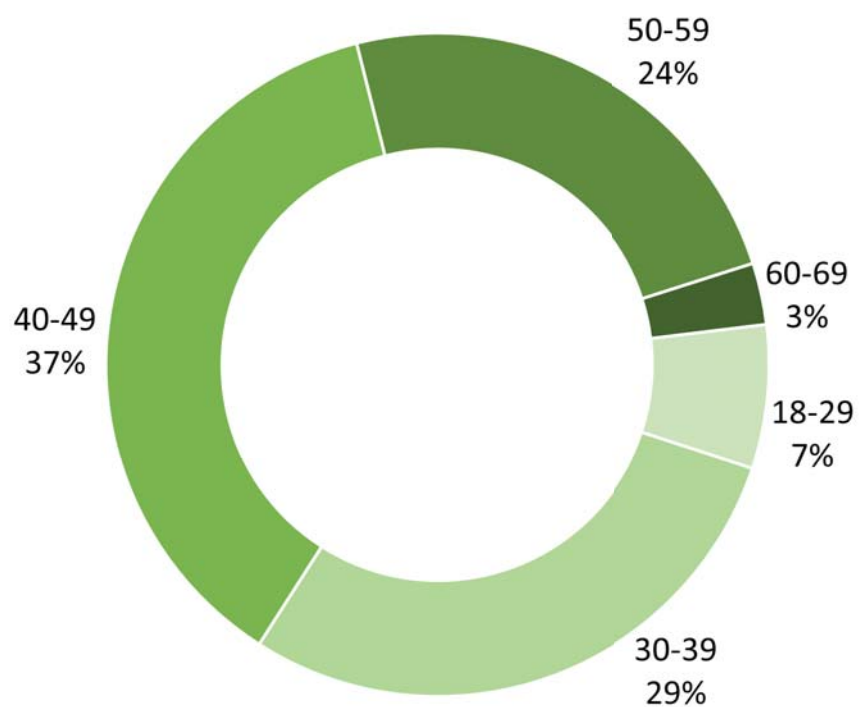


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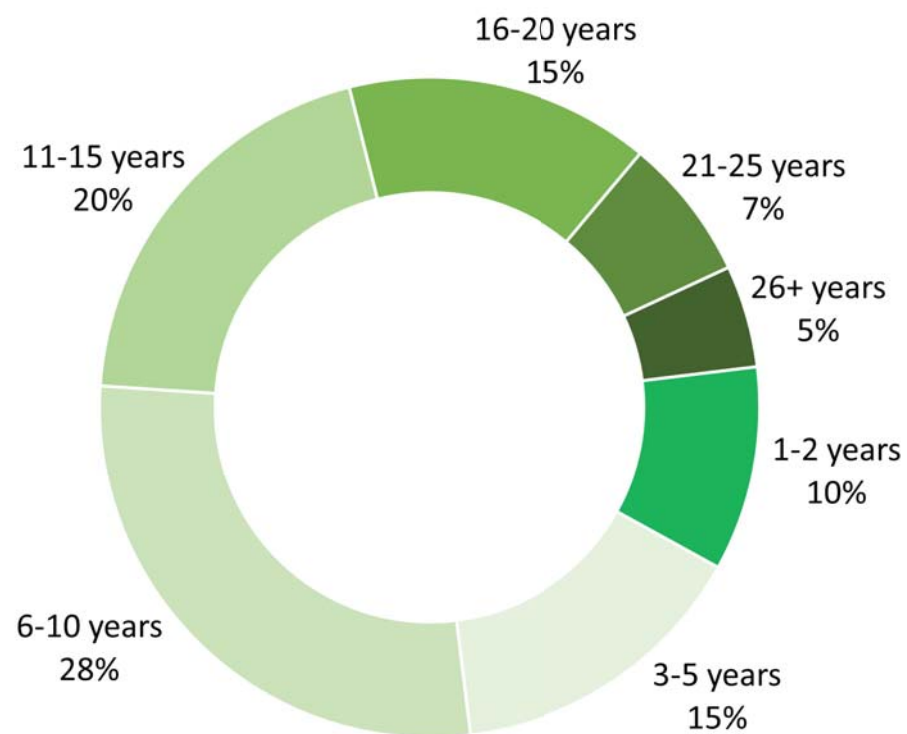
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Respondents' Ages



Years In Healthcare



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Digital marketing, a mainstay in other industries for years, is becoming more prevalent and sophisticated in healthcare, but still lags far behind the digital marketing strategies and techniques of other industries. This white paper shares the results of the first annual healthcare industry digital marketing survey jointly conducted by Greystone.Net and Klein & Partners, and sponsored by Sitecore.

It provides valuable insight for CEOs, CMOs, Web directors, digital managers and others involved in healthcare marketing to assess the current state of their organization's digital efforts, compare themselves to their peers and look at future opportunities. The results provide interesting – and telling – data.



Overall, health systems are doing much more digitally than other types of healthcare organizations, with larger budgets and more confidence in their digital efforts.

Key Takeaways:

- The healthcare industry is far behind other industries in the use of digital marketing efforts.
- Healthcare organizations are using a relatively limited number of social media channels with no real plans to expand to others.
- With half of survey respondents reporting that they plan to upgrade or change their CMS platform and over 60% reporting a plan to redesign either their Website or intranet in the coming year, there are many opportunities for growth and improvement.
- Fifty percent (50%) of these senior marketers report using a Customer Relationship Management (CRM) system, with only:
 - a little over 25% saying their CRM is integrated with their Website
 - 11% saying their CRM and Websites are integrated **well**.
- Less than a quarter of survey respondents report using a marketing automation tool, which is significantly behind other industries.
- Healthcare organizations are not truly prepared for mobile, and only 33% consider a Mobile First strategy to be “essential.”
- There is much room for improvement in achieving the digital goals of healthcare organizations.

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Key Takeaways, *con't*:

- Healthcare is not leveraging the marketing advantages of more advanced or emerging digital activities, such as wearables, Internet of Things (IoT) or beacon technology.
- The top three challenges/barriers for healthcare digital marketing efforts are:
 - Money
 - Silos
 - Managing change.
- Less than half of the survey respondents report that their organization has mapped either the Mobile customer journey or the Digital customer journey.
- Only half of the survey respondents reported conducting usability testing and only 47% said they conduct Web visitor experience research.
- Healthcare marketers are optimistic about future budget resources, with over 80% expecting their marketing budgets next year to either increase or remain steady.
- Marketers from health systems are more likely to believe they “own” the digital experience, brand promise and customer experience at their organization than marketers from other types of healthcare organizations.

Three-quarters of survey respondents consider a strong digital and interactive strategy to be essential to building their brand.

What We Learned: **Detailed Survey Results**



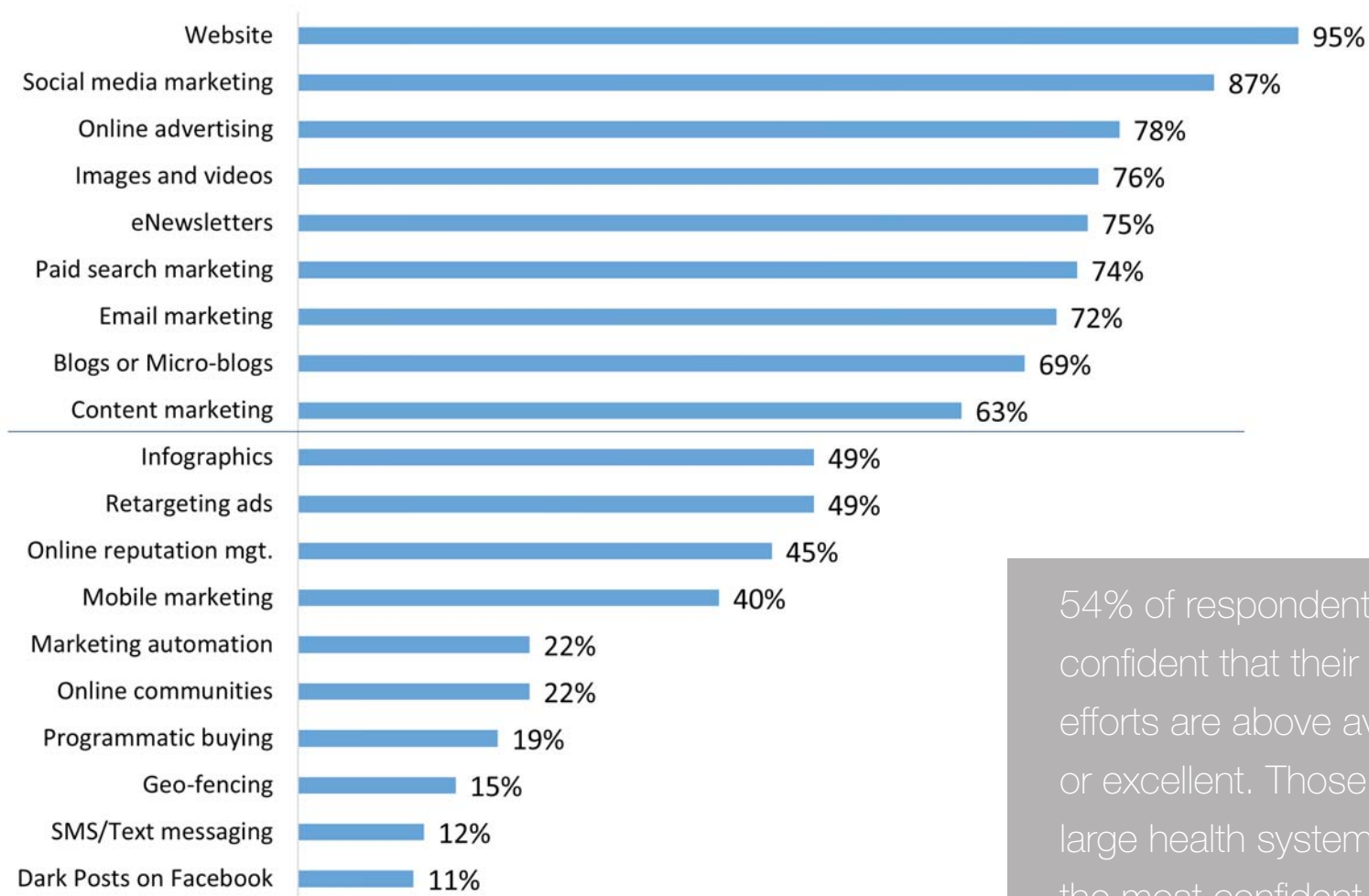
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Online/Digital Marketing Techniques Used

Online/Digital Marketing Currently Used at Hospital/System



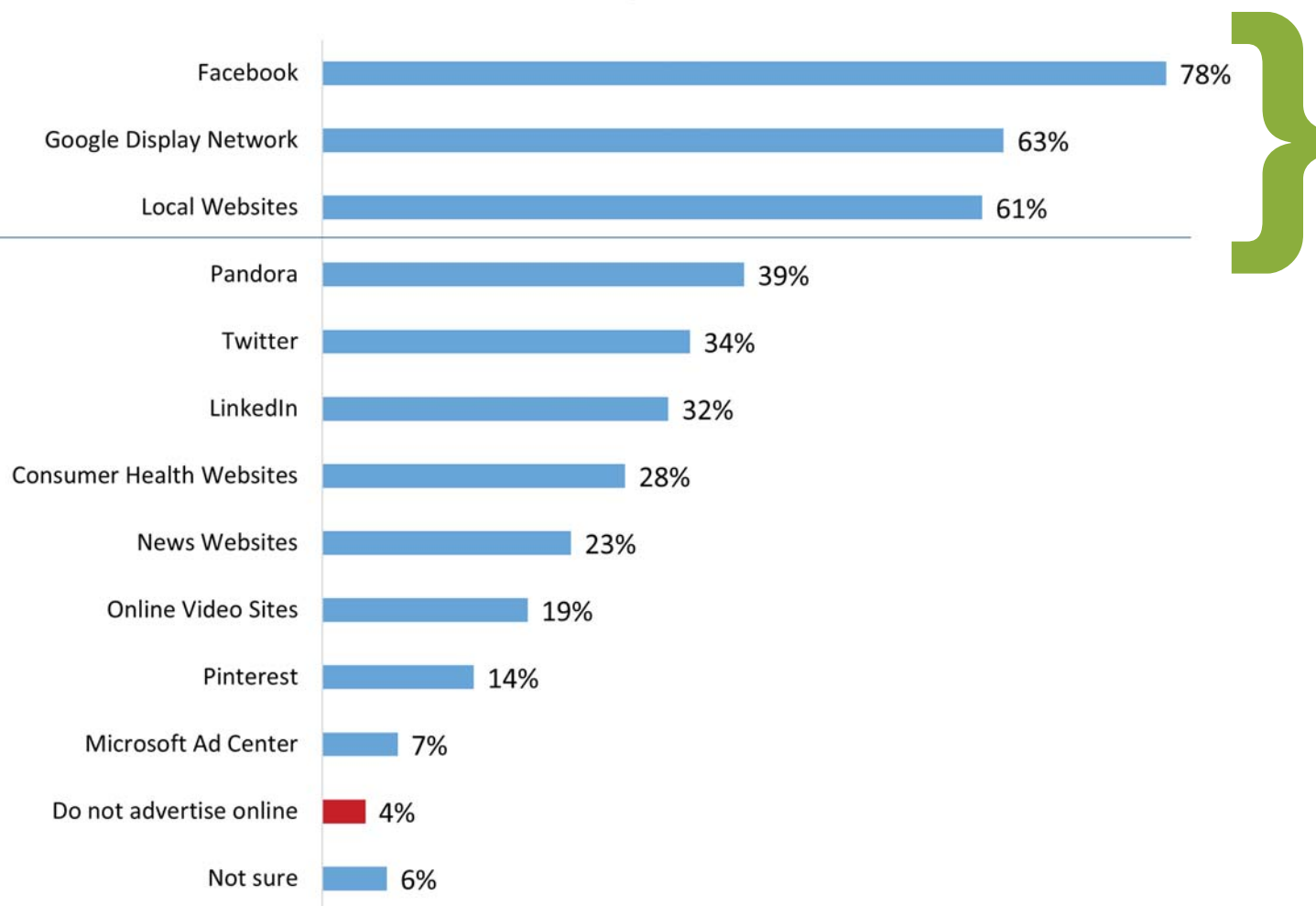
54% of respondents are confident that their digital efforts are above average or excellent. Those from large health systems are the most confident.

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Online Advertising Used In Healthcare



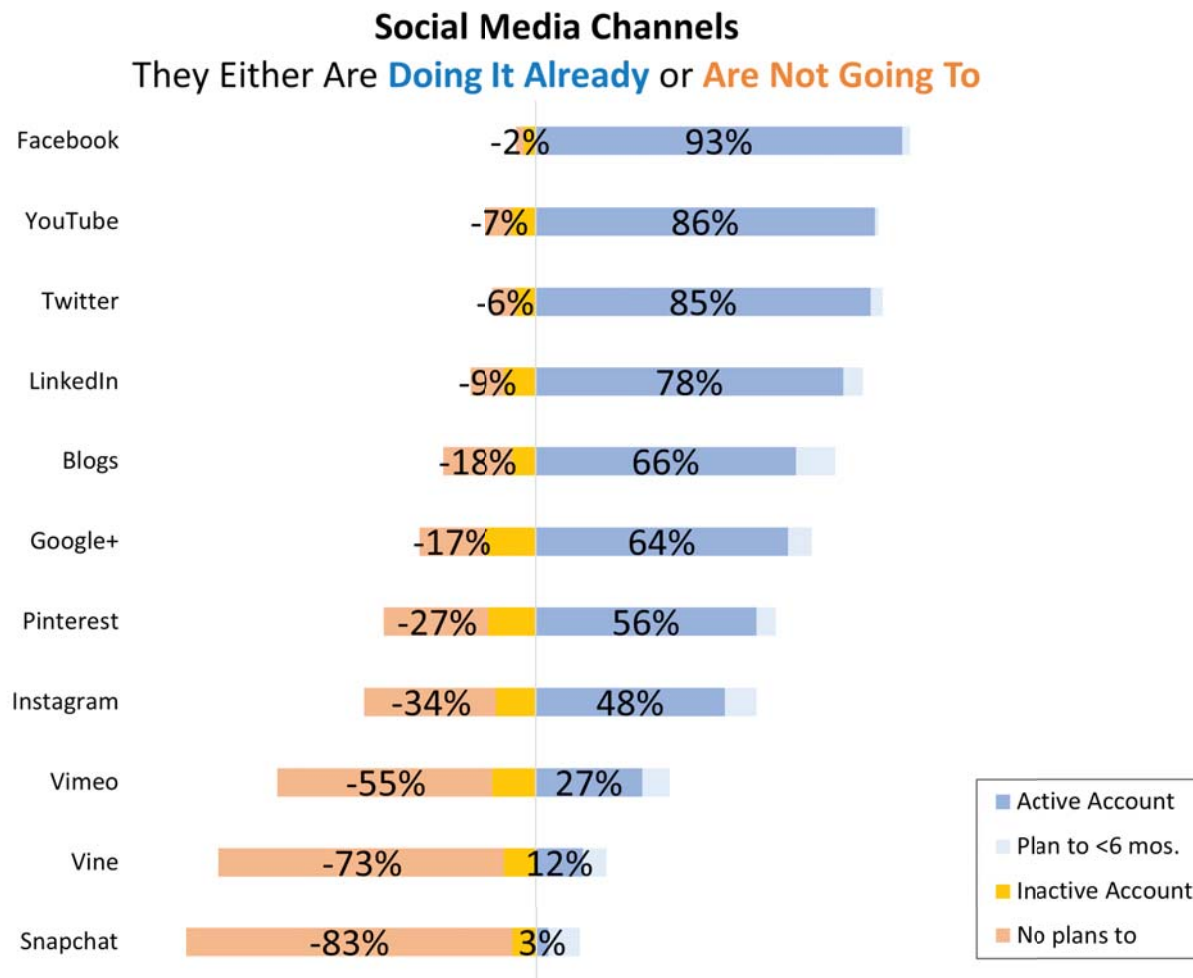
Three most-used online advertising techniques

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Very few organizations plan to expand beyond the social media channels currently being used.

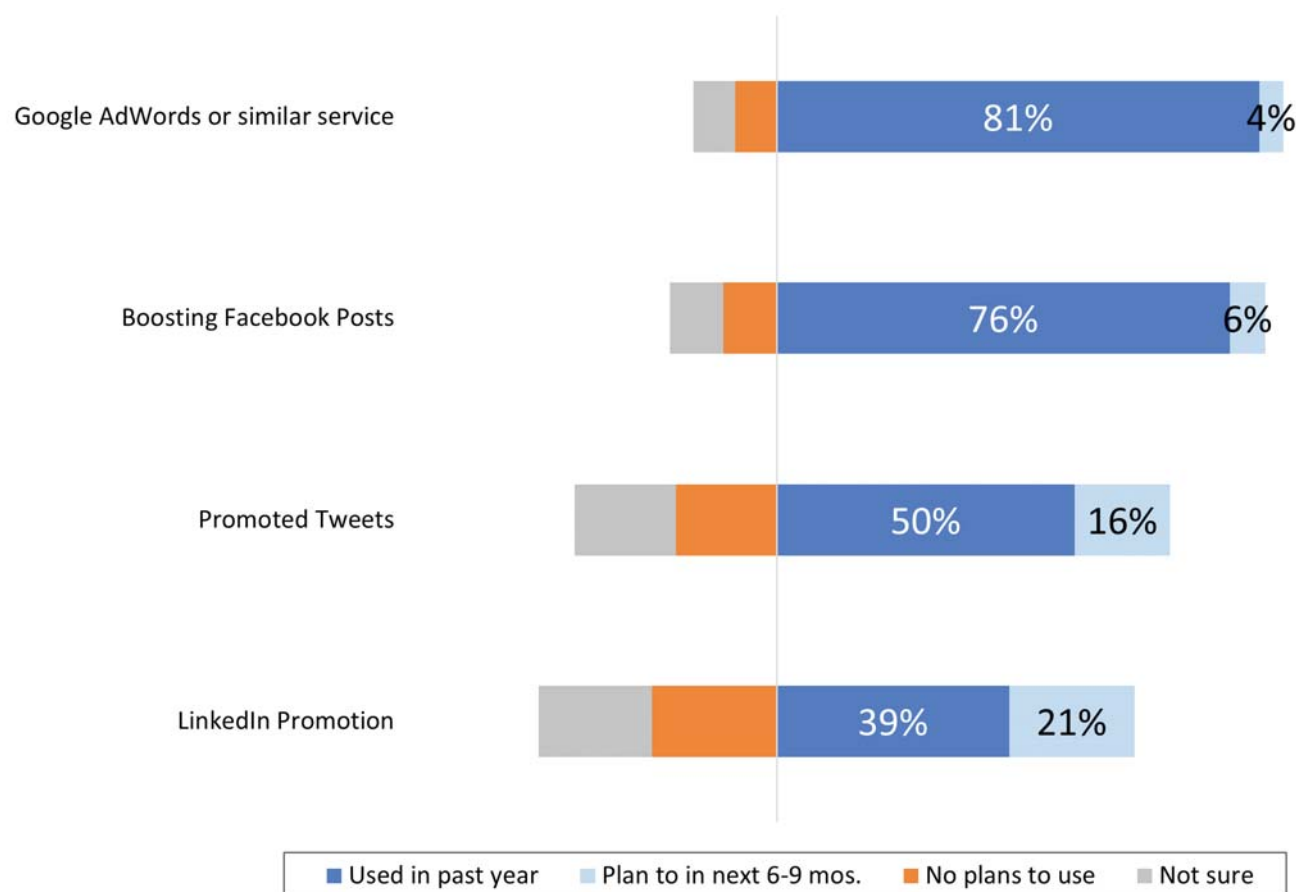


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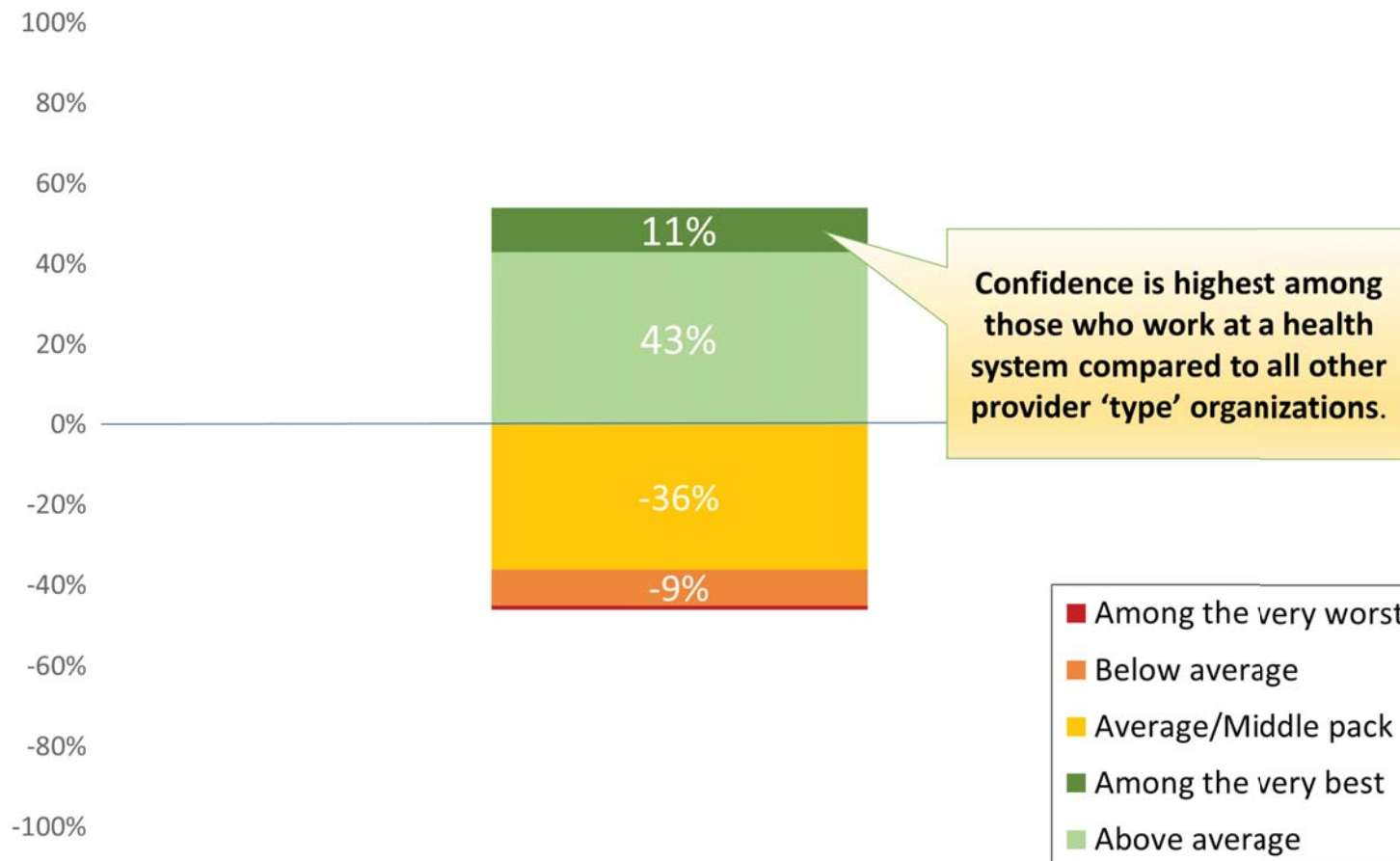
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Online Advertising Techniques Being Used in Healthcare



Google AdWords and boosting Facebook posts are the most used online advertising techniques in healthcare.

How An Organization Rates its Digital and Interactive Efforts Compared to Other Hospitals/Systems Across the US



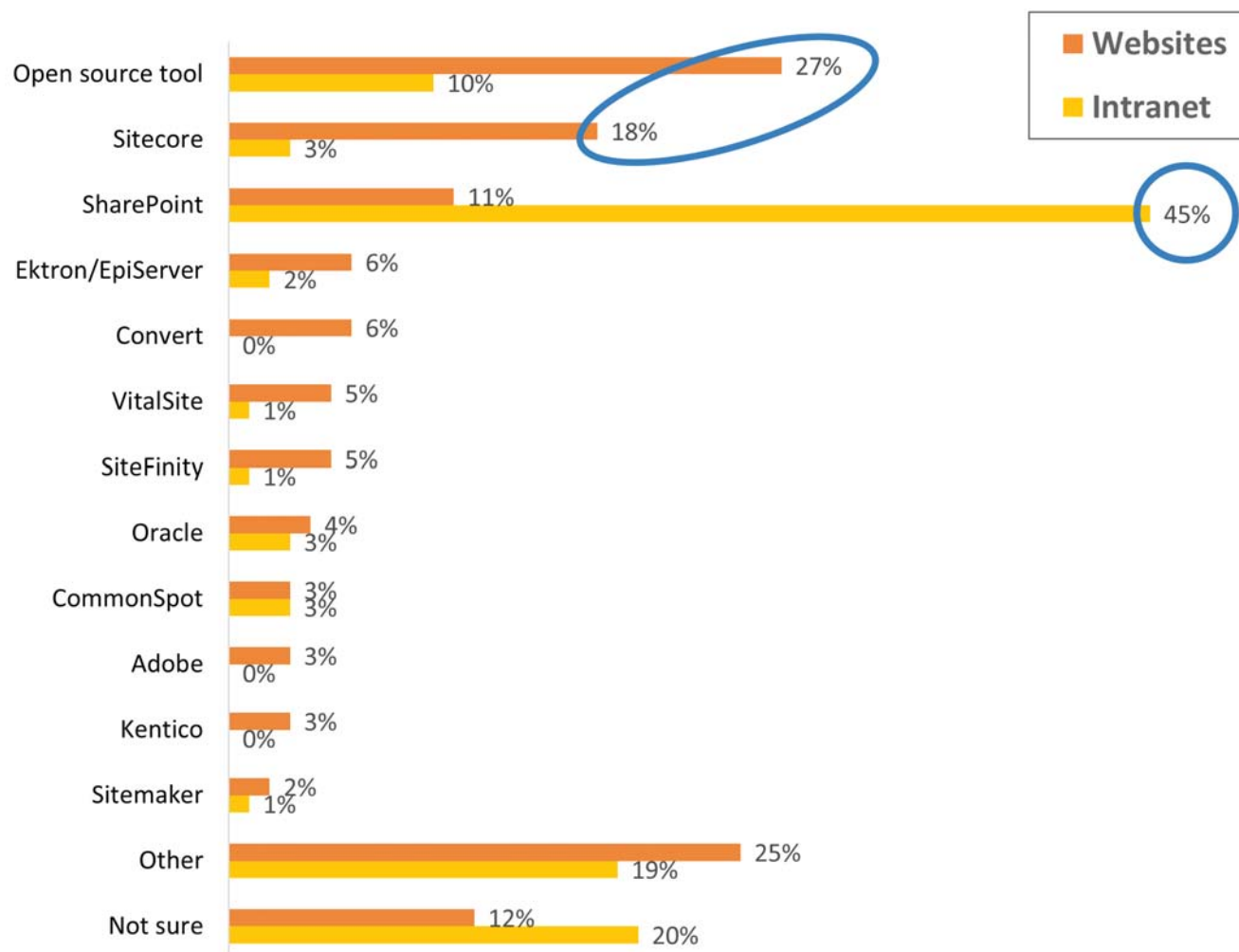
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Content Management Systems Being Used in Healthcare

Content Management System (CMS) Software Used to Support ...

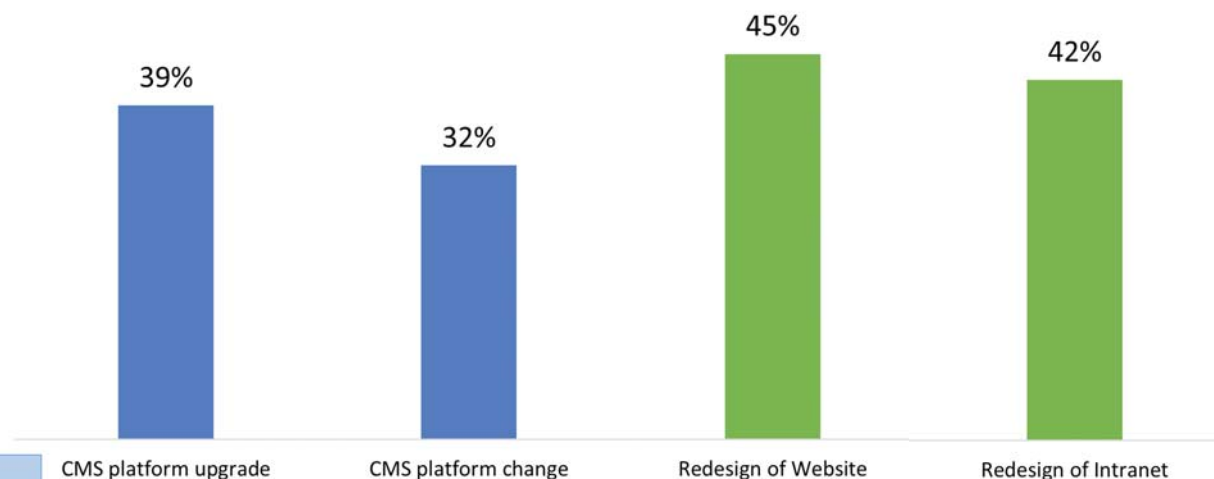


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Planning Platform and Design Changes in the Coming Year?



51% are changing and/or updating their CMS platform.

		CMS Platform Change	
		No	Yes
CMS Platform Upgrade	Yes	19%	20%
	No	49%	12%

		Redesign Website	
		No	Yes
Redesign Intranet	Yes	18%	24%
	No	37%	21%

63% are redesigning one or both sites.

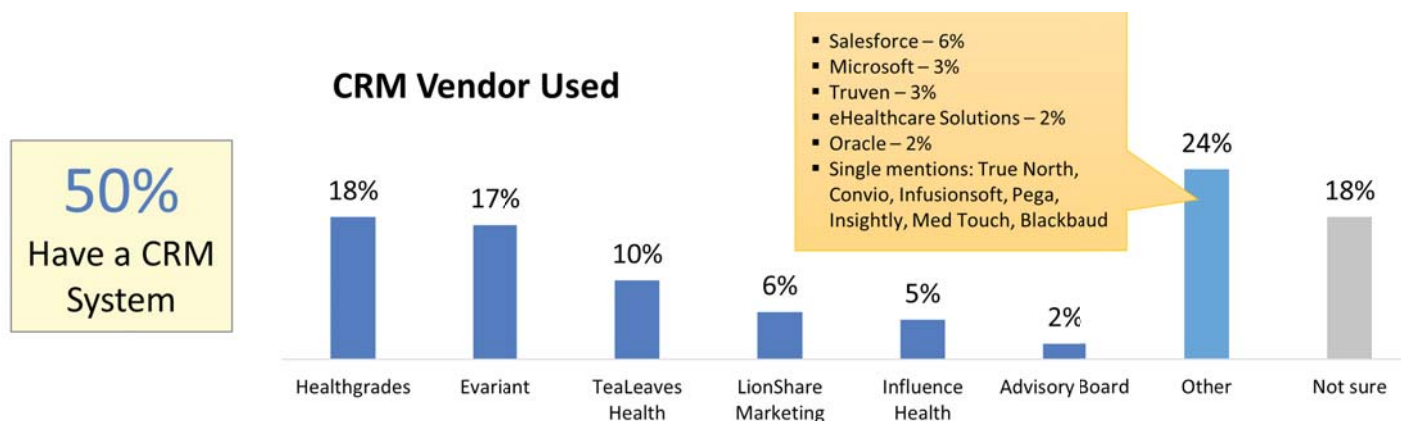
With half reporting that they plan to upgrade or change their CMS platform and more than 60% planning to redesign either their Website or intranet in the coming year, there are many opportunities for improvement and growth in 2016.

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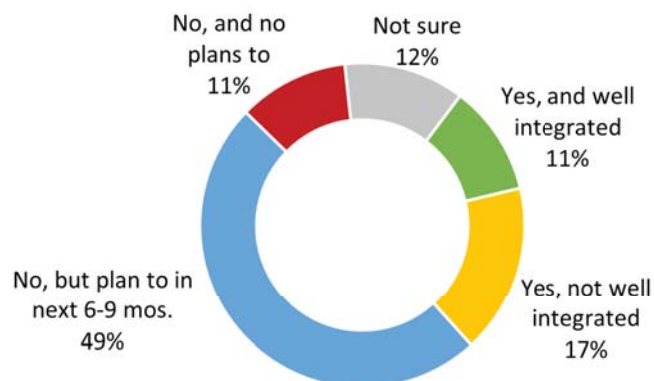
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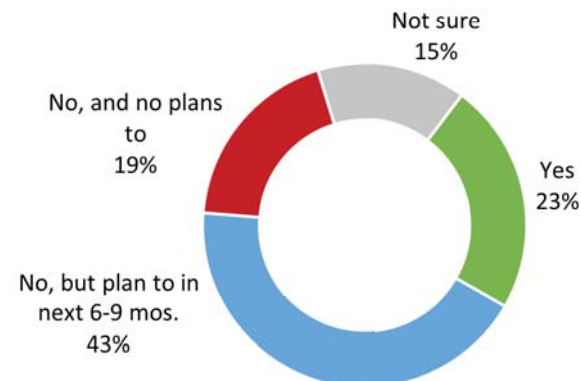
Customer Relationship Management



How Well Website and CRM Integrated

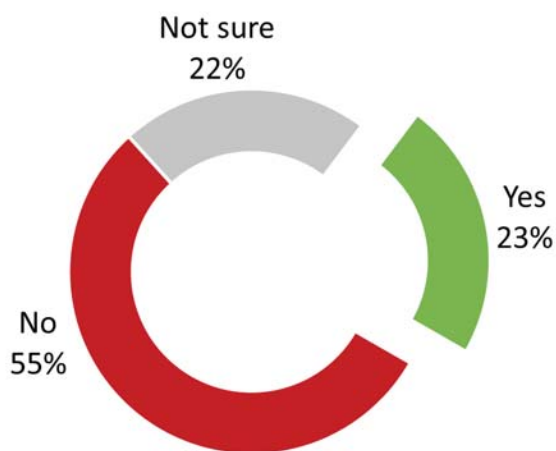


Undertaking Any Social CRM Activities



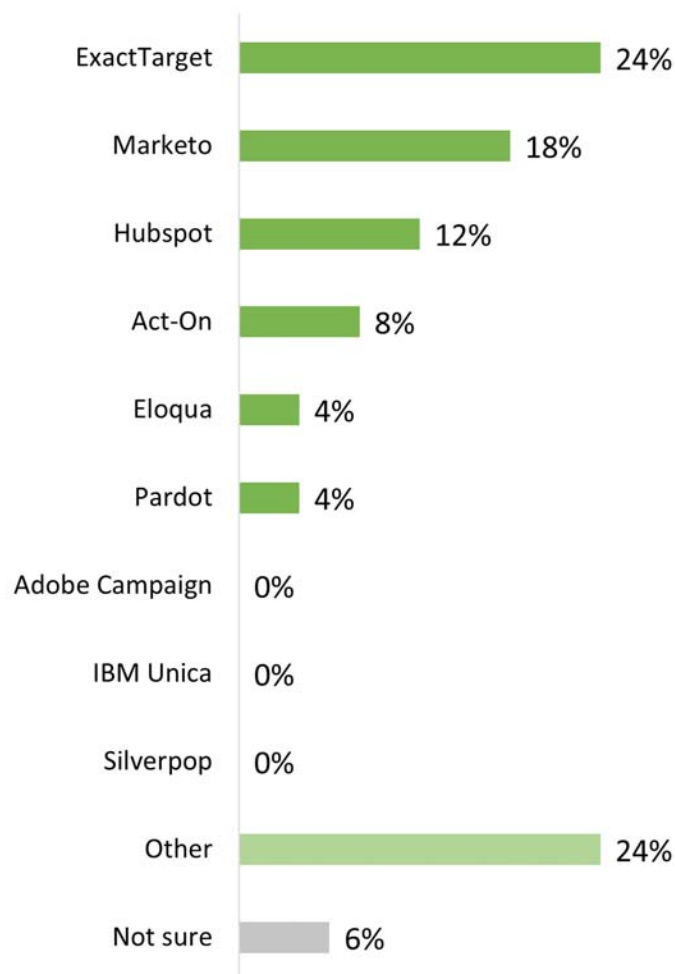
Healthcare organizations are early in the CRM journey and are not linking their CRM to other functions.

Use of a Marketing Automation Tool



Less than a quarter use a marketing automation tool; this reveals another area in which healthcare organizations lag other industries.

Marketing Automation Tool Used



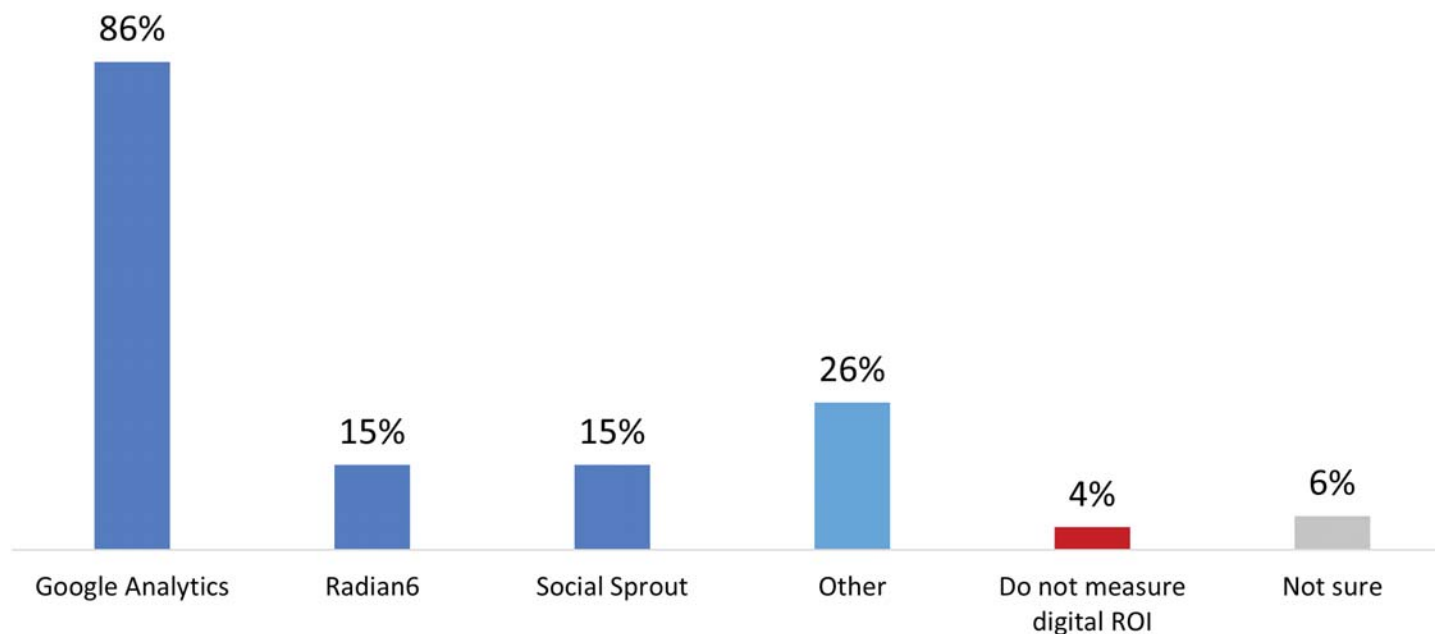
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Return on Investment and Key Performance Indicators

Tools Used to Measure Digital Return on Investment (ROI)



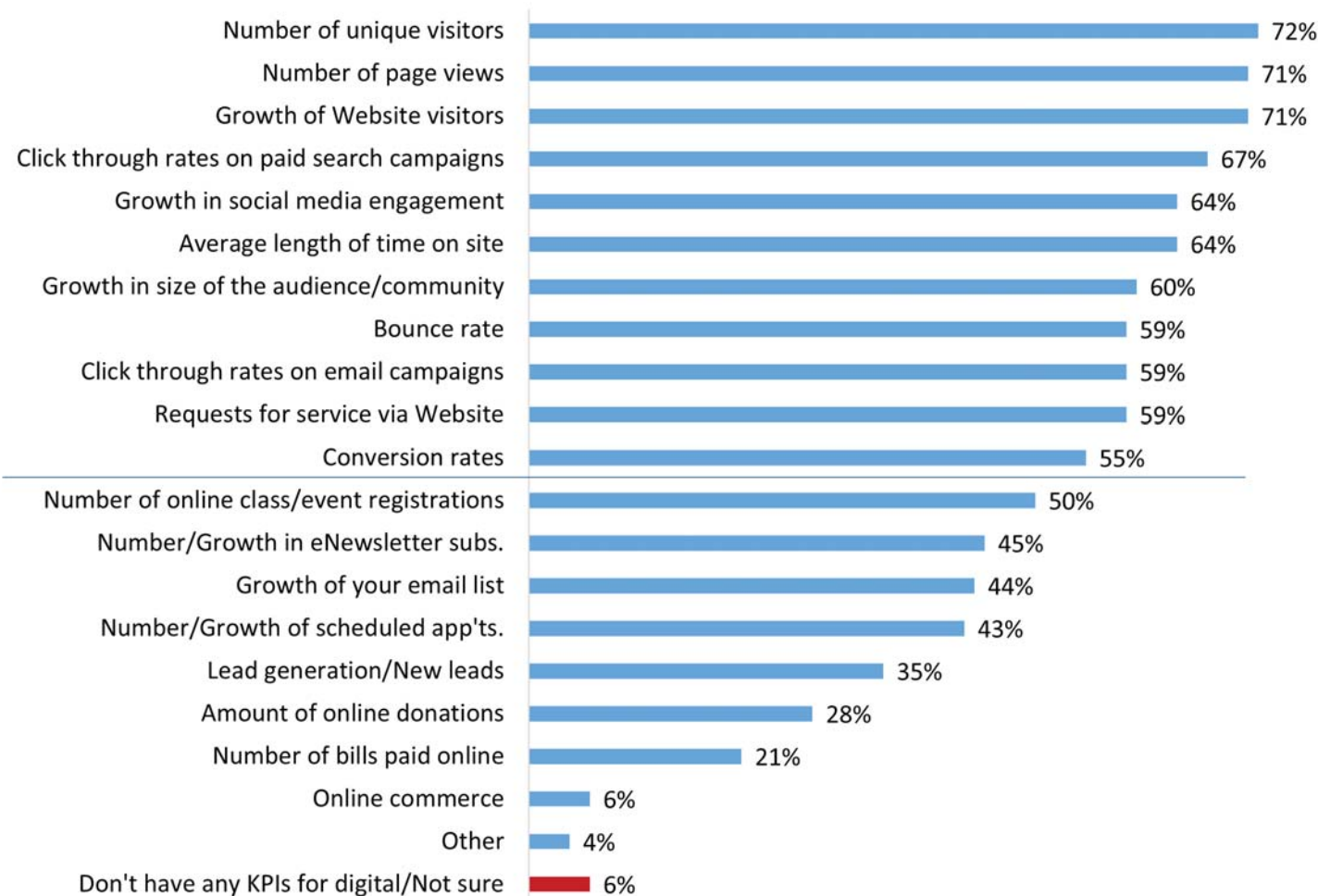
Google Analytics is used almost three times more often than the next two options combined.

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Digital Key Performance Indicators (KPIs)

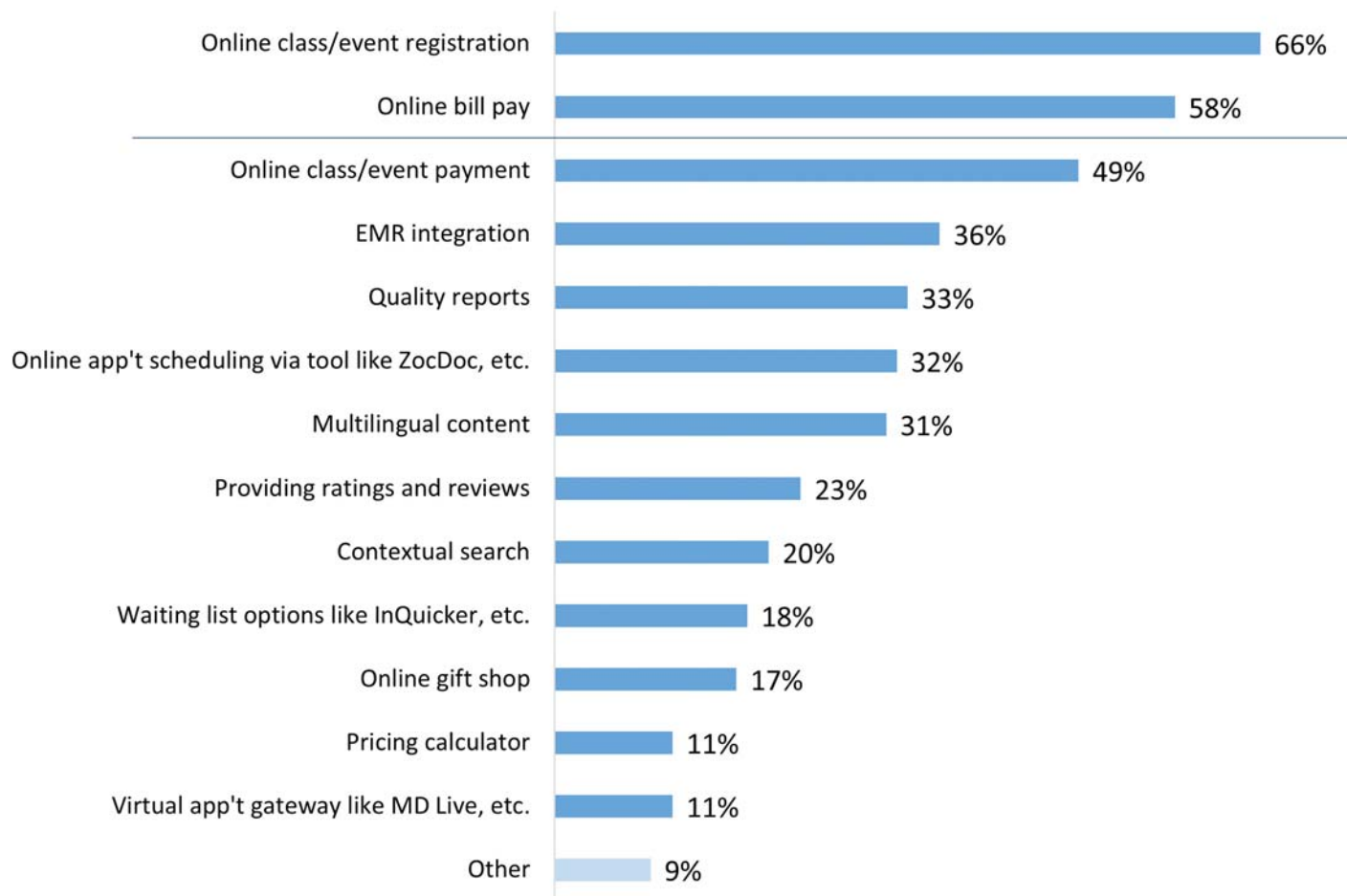


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New or Emerging Functionality Available on Healthcare Websites



Web Innovations

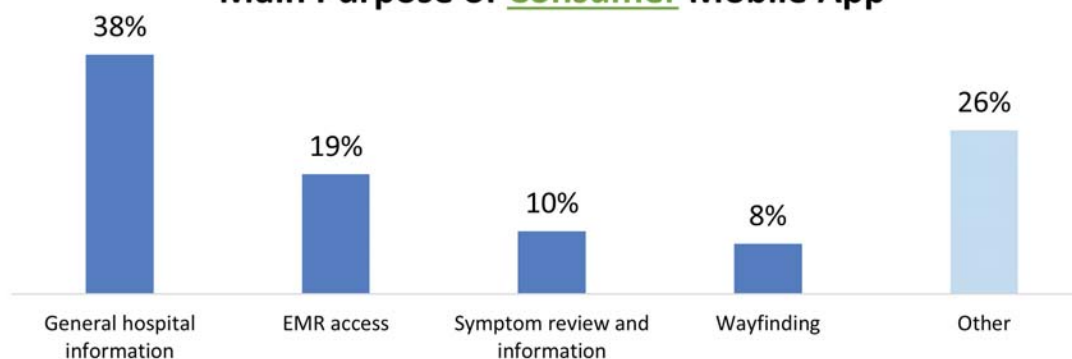
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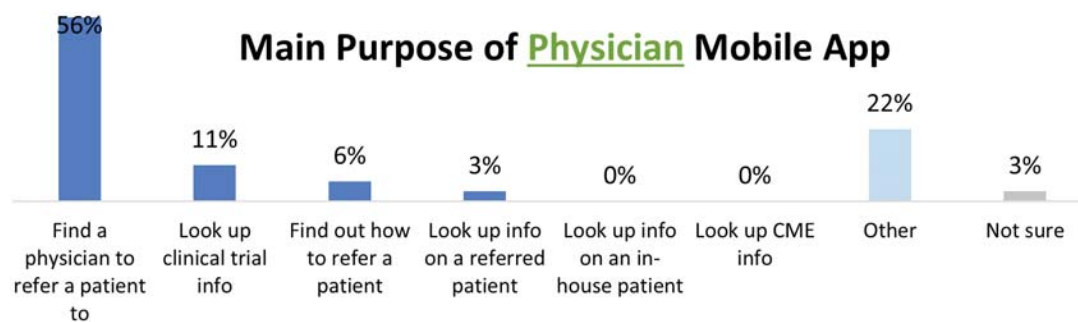
43%
Have a Mobile
App for
CONSUMERS

Main Purpose of Consumer Mobile App

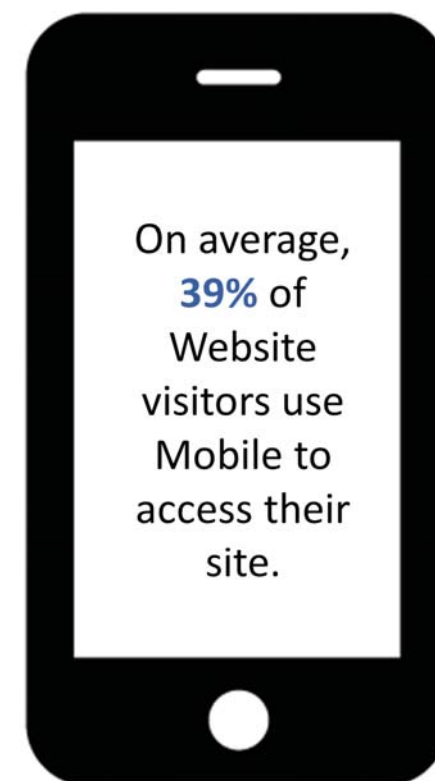
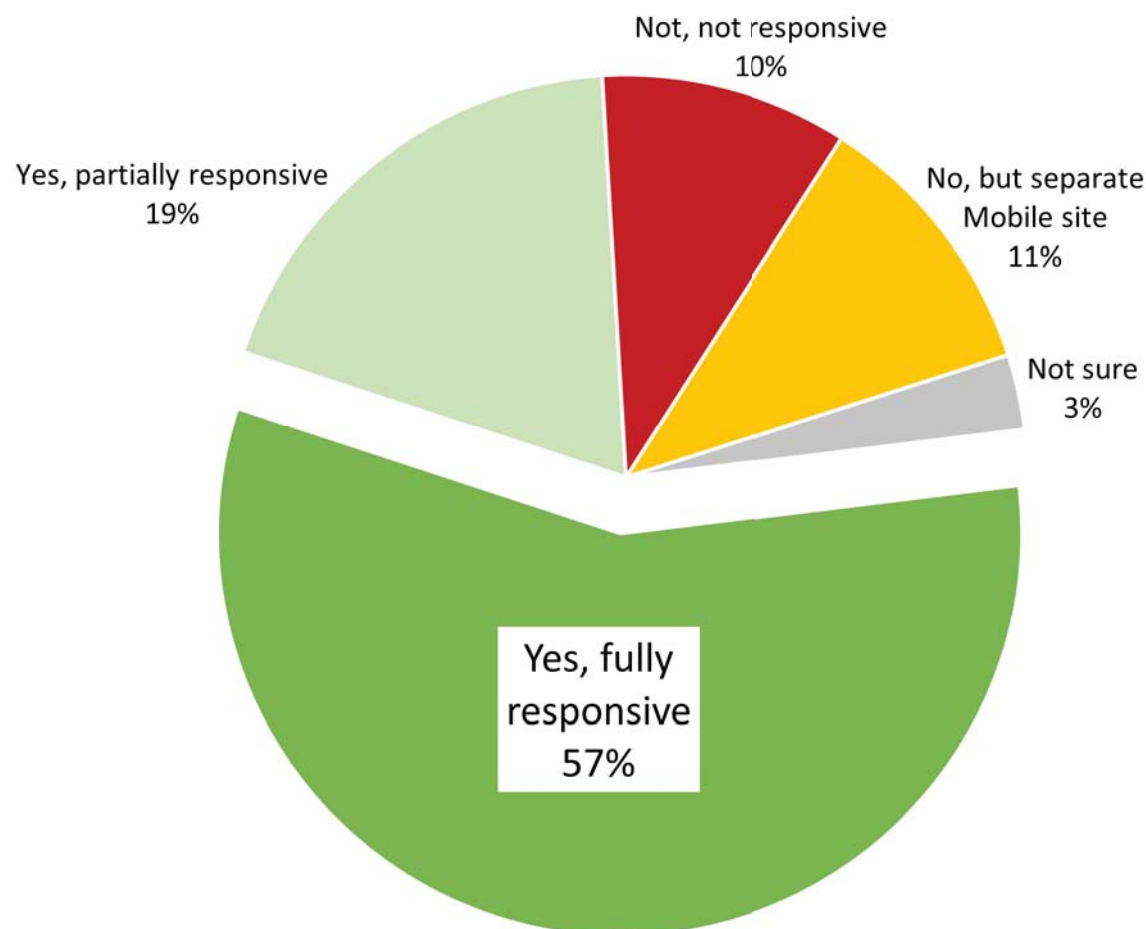


17%
Have a Mobile
App for
PHYSICIANS

Main Purpose of Physician Mobile App



Website Responsively Designed

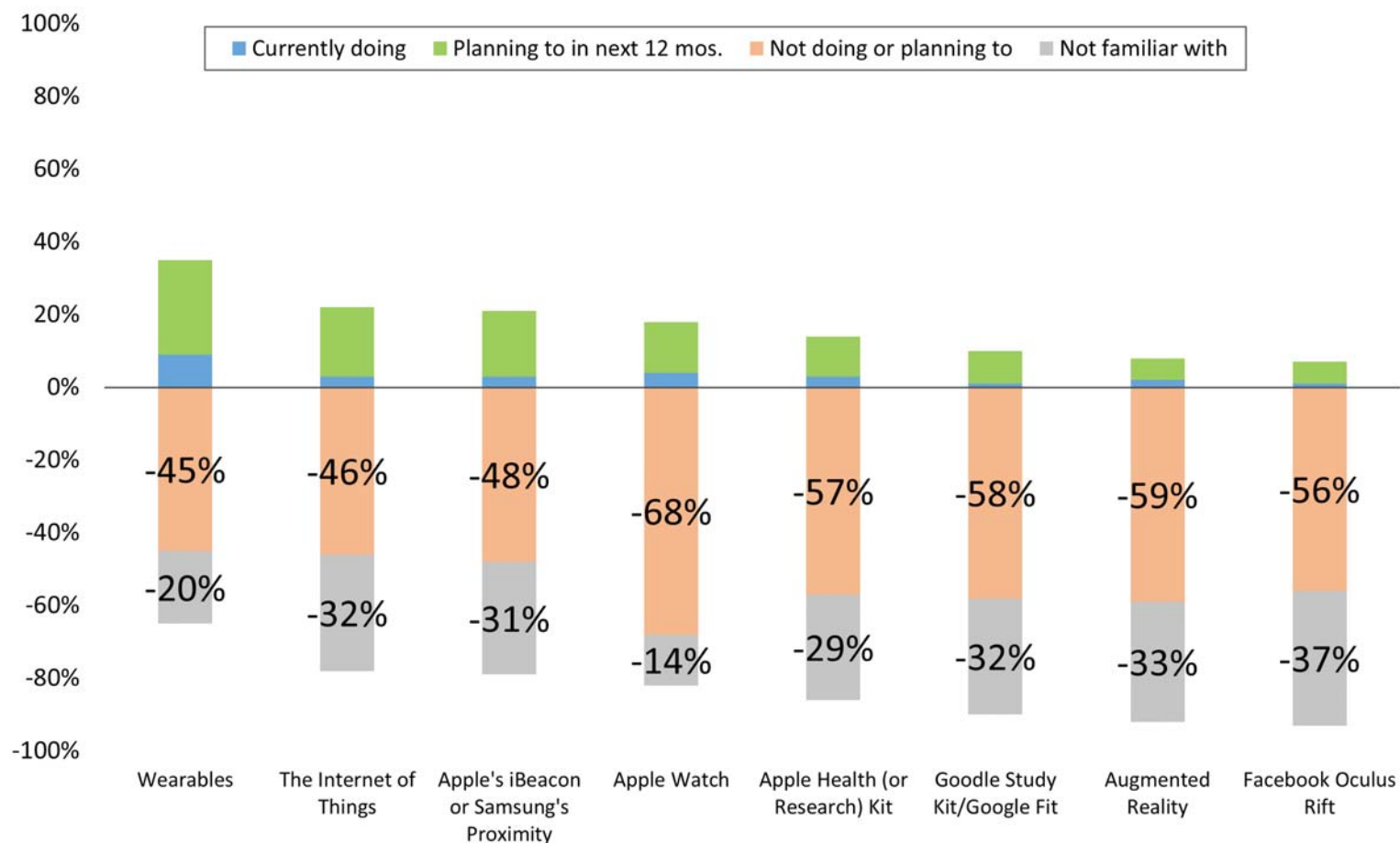


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Advanced Digital Marketing Activities



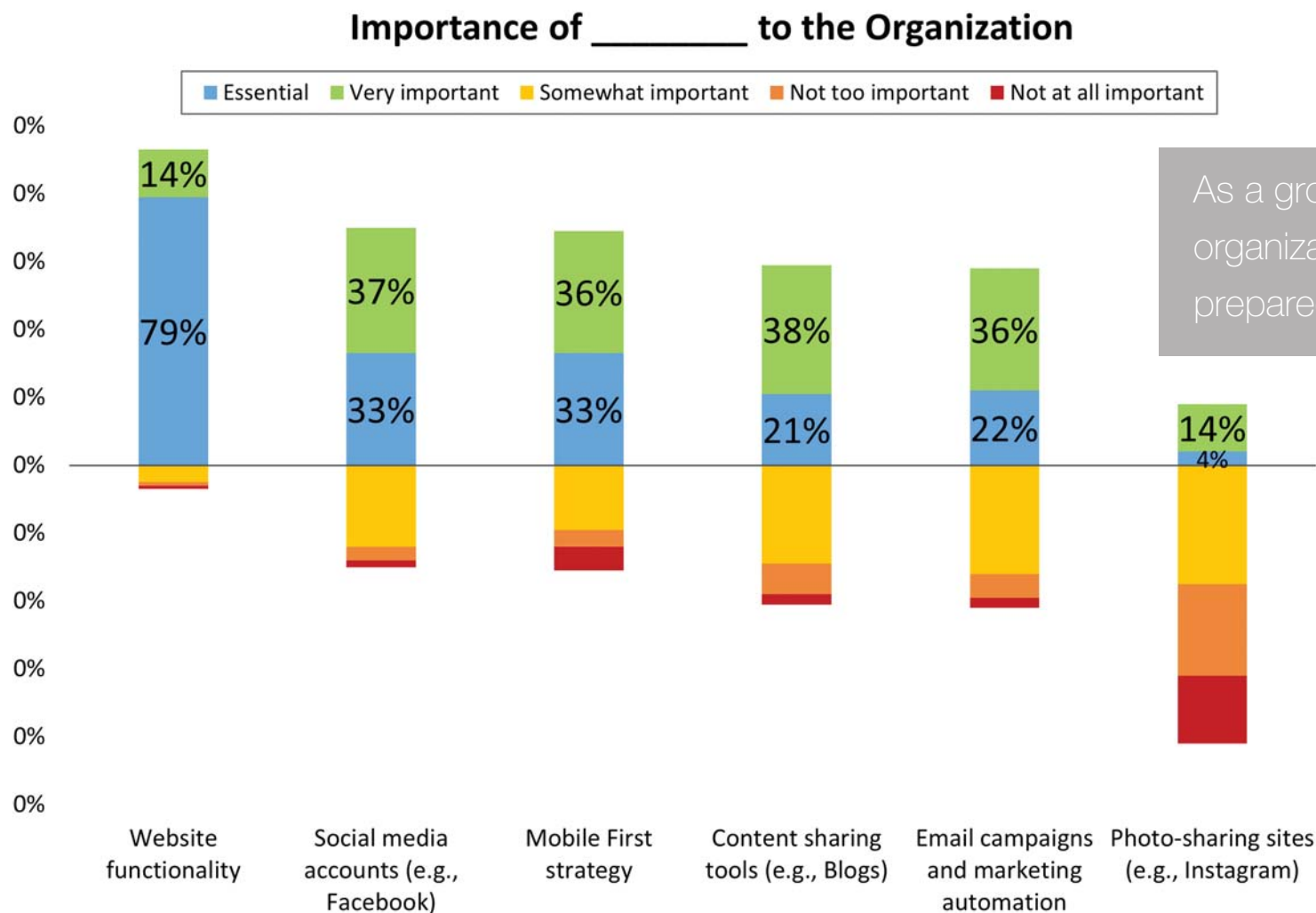
Across the board, healthcare marketers are not leveraging the latest digital marketing technologies.

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Importance/Effectiveness of Digital Marketing Efforts



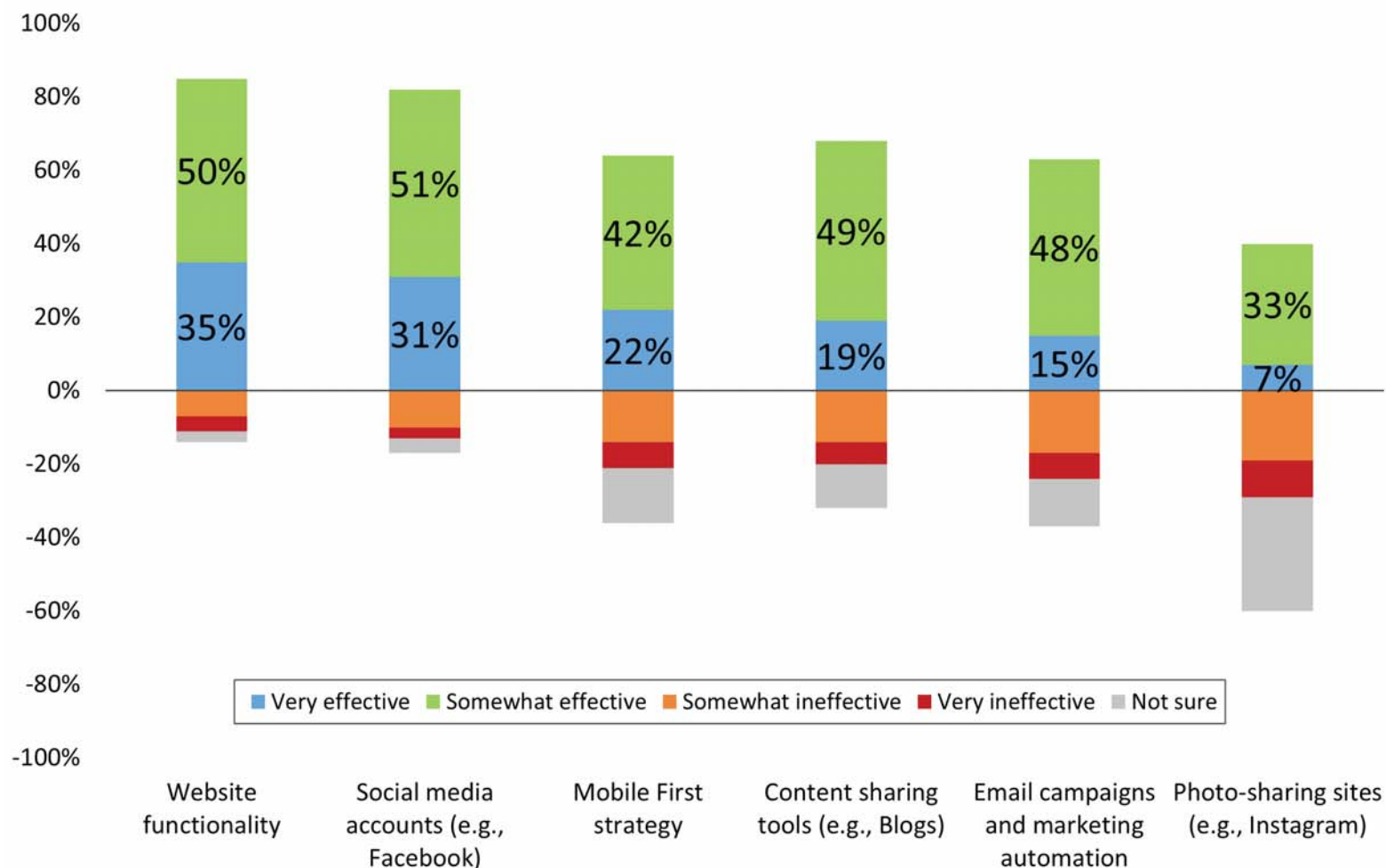
As a group, healthcare organizations are not prepared for mobile.

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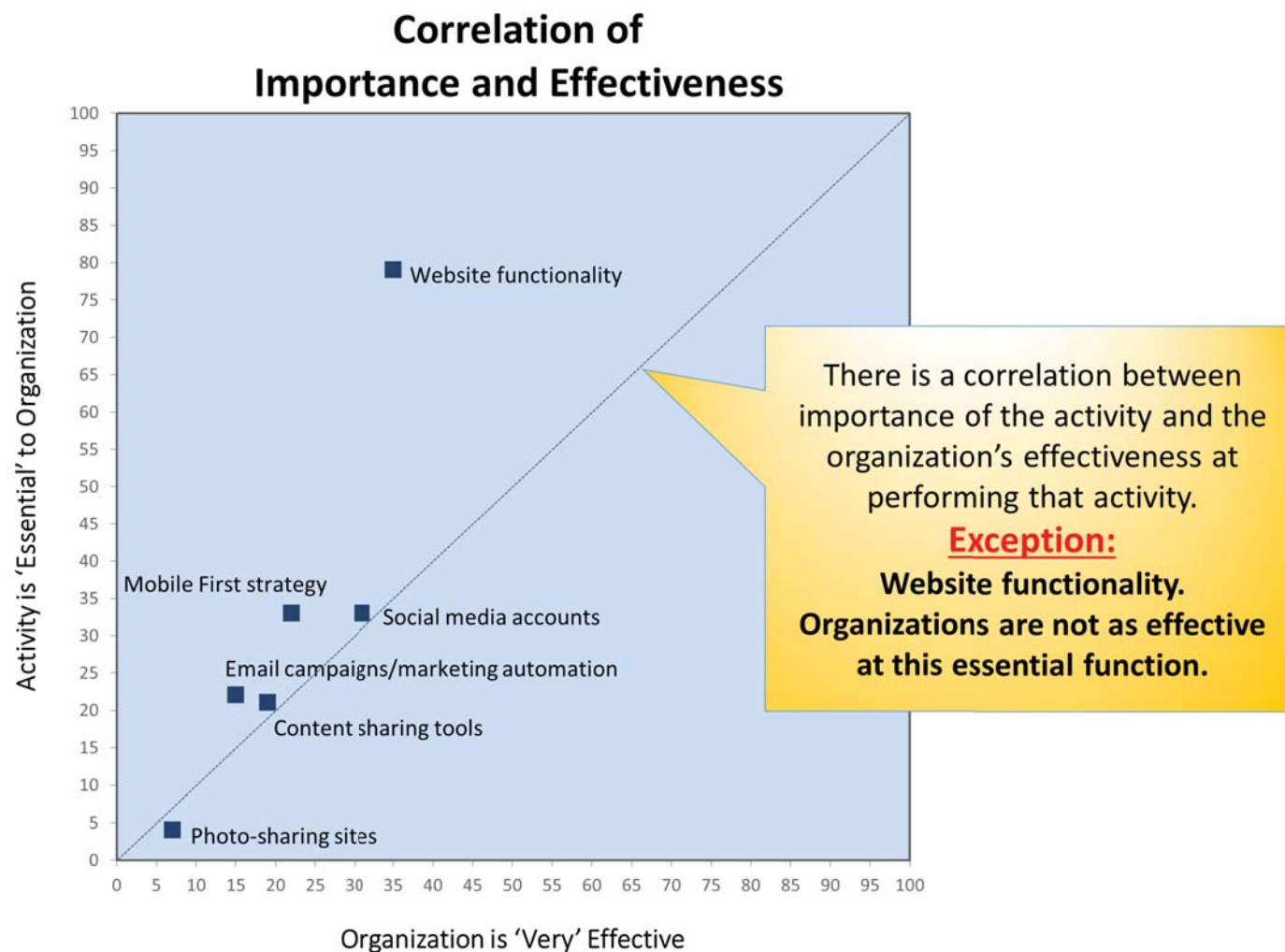
How Effective the Organization Has Been at...



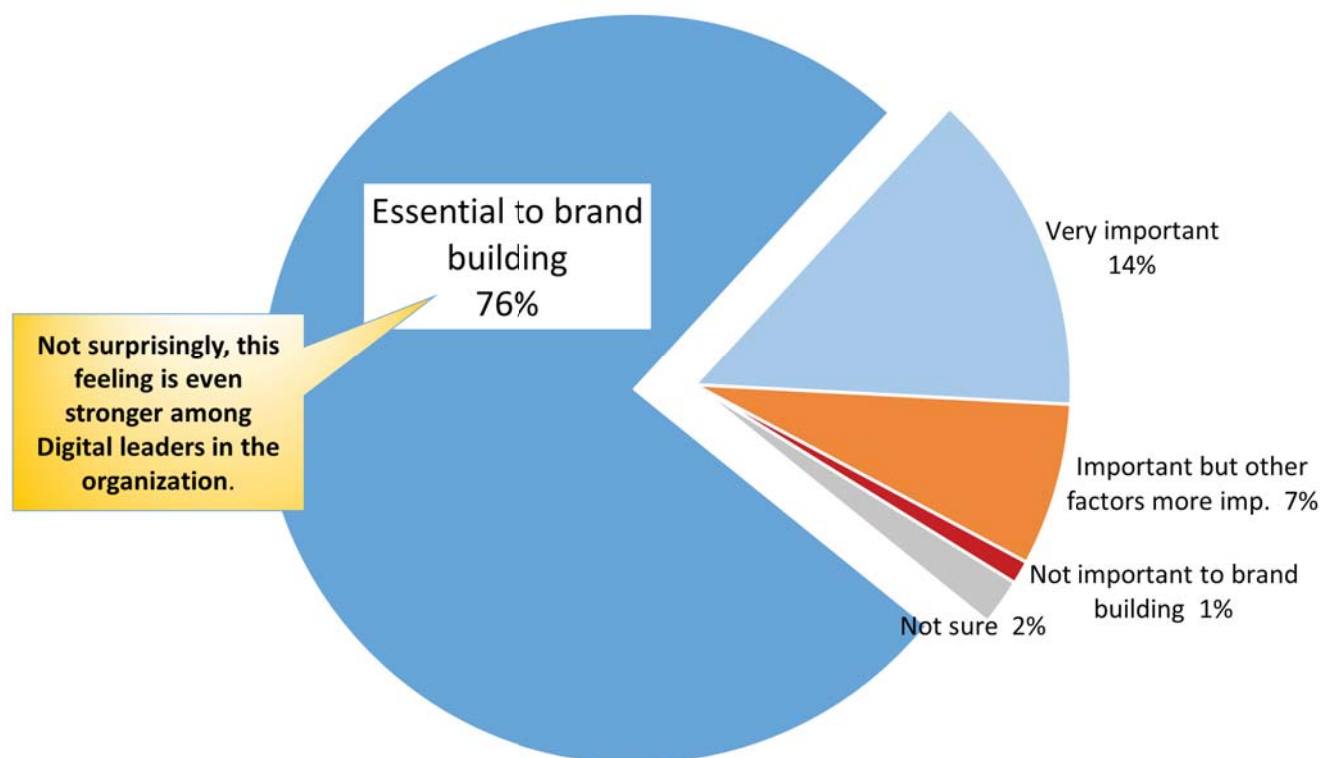
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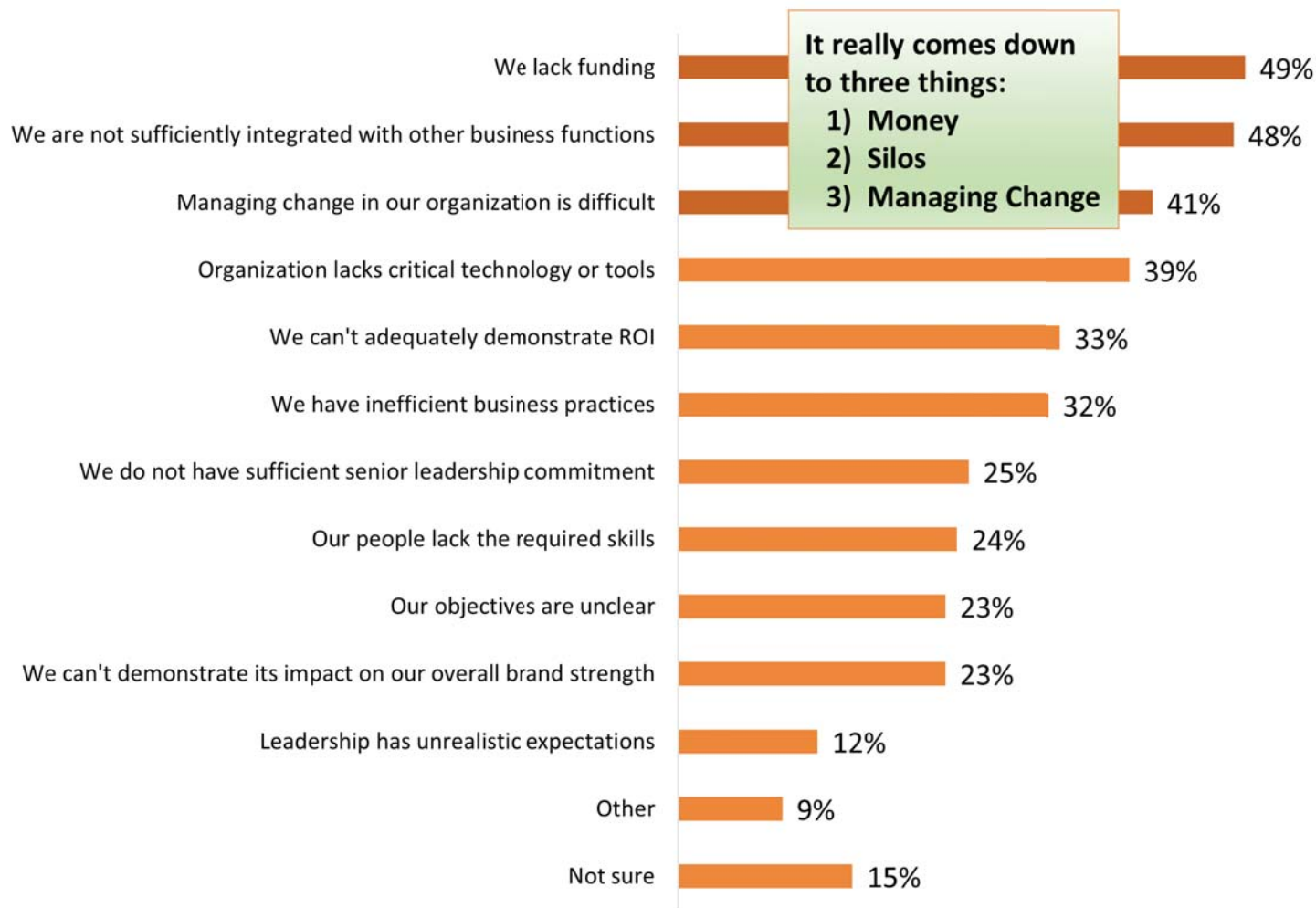
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Importance of a Strong Digital and Interactive Strategy in Building a Strong Brand Overall



Challenges/Barriers Affecting Digital Marketing Efforts



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***Benchmark:** These are 'average' scores across all Beta studies combined.

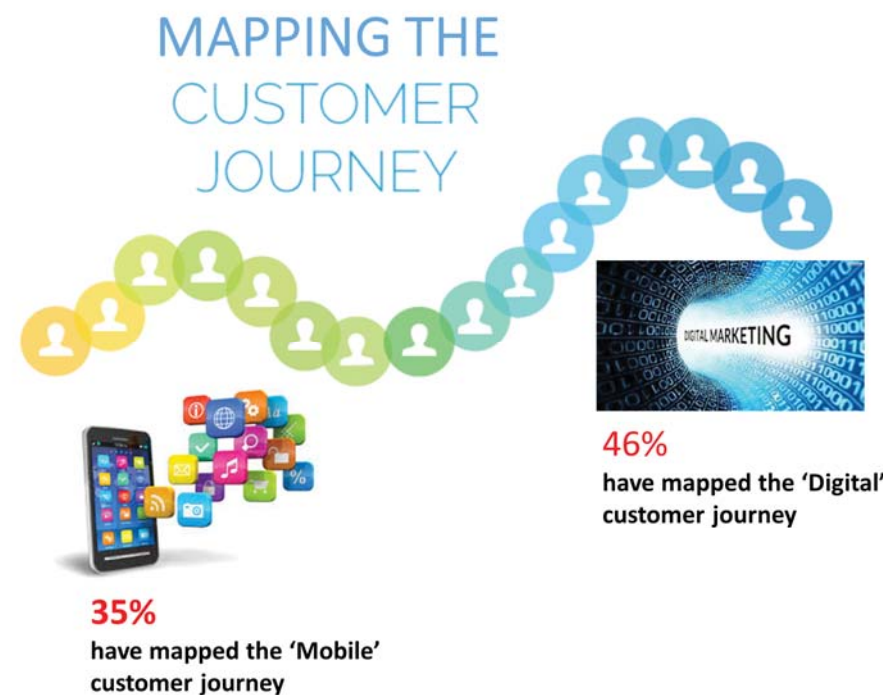
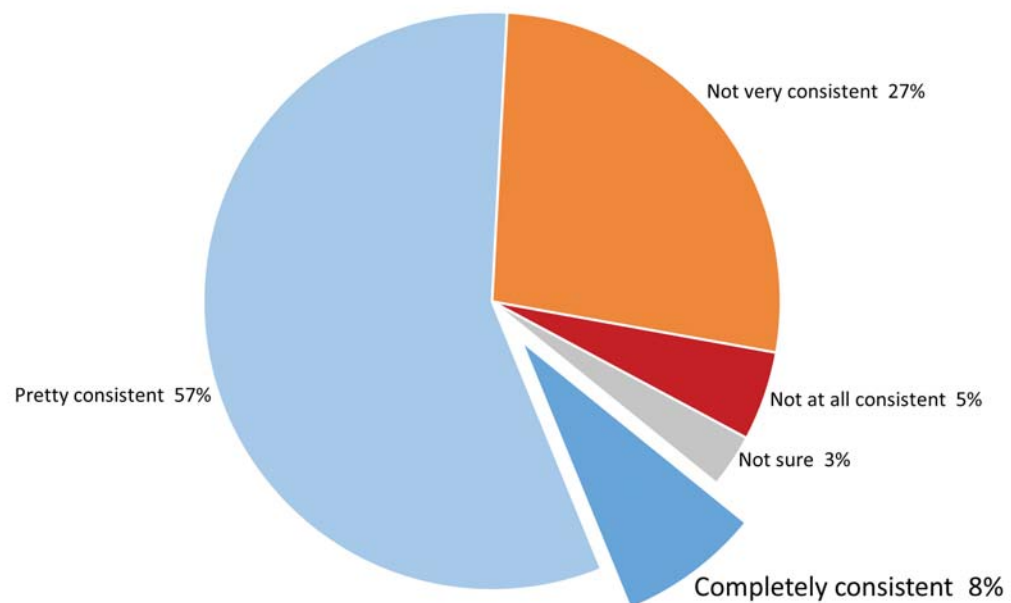
****Leaderboard:** These scores are calculated by analyzing scores across all Beta studies and basing each leaderboard score on how those who gave 5 Stars or said the experience was exceptional scored that metric. Strong Websites either exceed the leaderboard metric (for a positive metric) or are below the leaderboard metric (for a negative metric).

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Consistency of the Customer Journey Across Digital Platforms and Channels

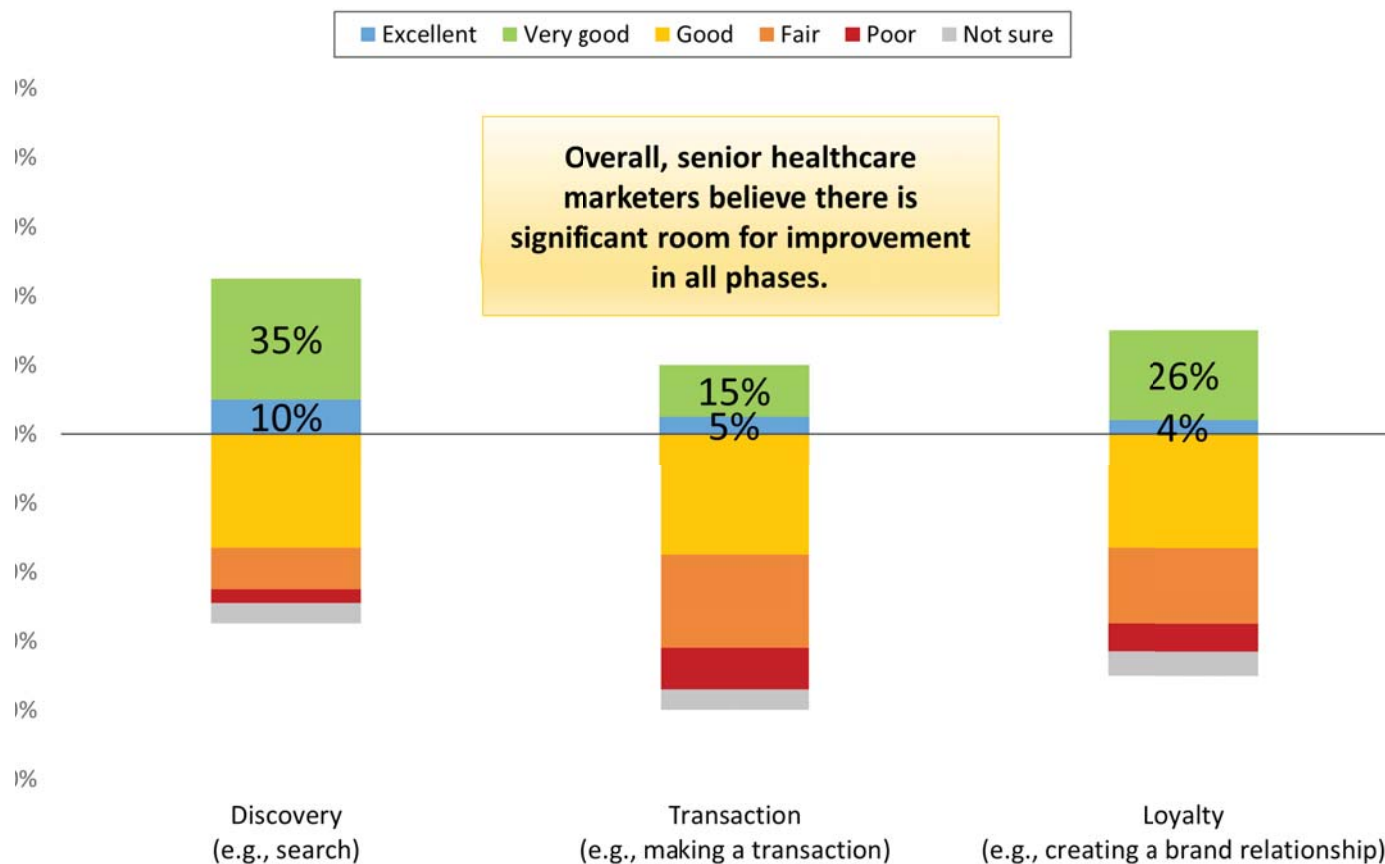


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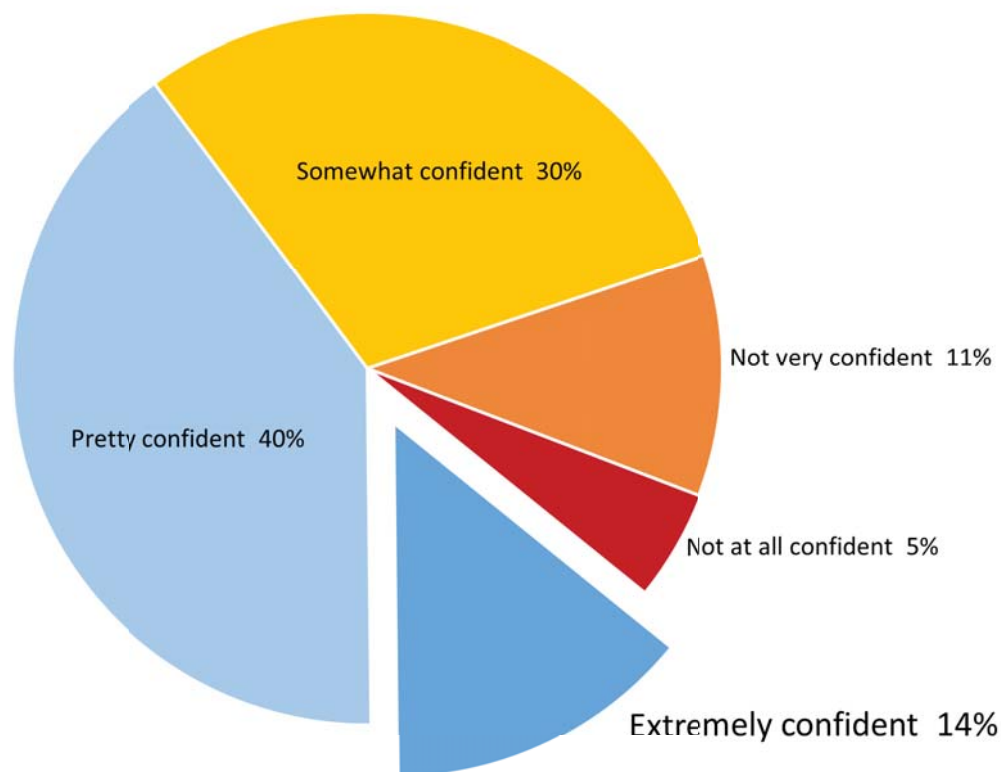
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Effectiveness of Digital and Interactive Strategy Along the Journey



Confidence in Being a Catalyst to Drive Digital Transformation in the Organization



35

Online Research is Underutilized

Both usability testing and visitor experience research are conducted by more academic medical centers and children's hospitals than community hospitals and critical access hospitals.



50%

conduct usability testing



47%

conduct Web visitor
experience research

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61% of healthcare organizations block all or some staff from social media sites at work.

45%
block **SOME** staff but not all from these sites

16%

block **ALL** staff from going on social media sites



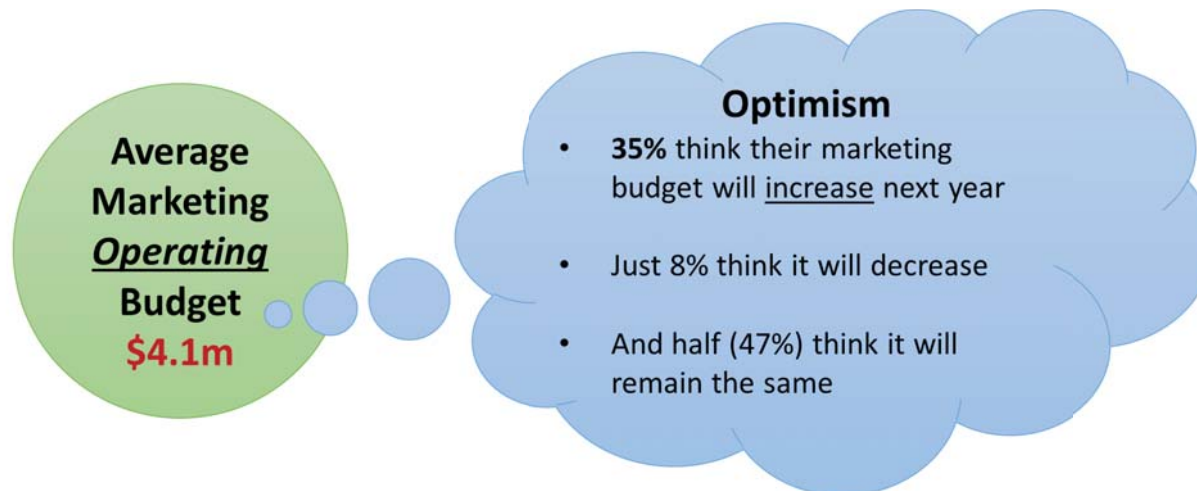
35%
do **NOT** block any staff from going on these sites

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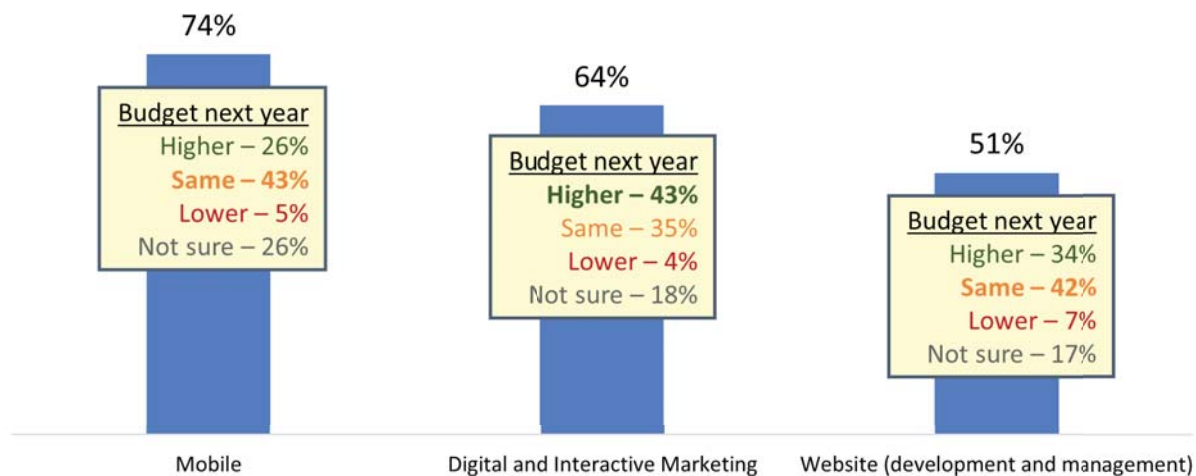
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Available Resources



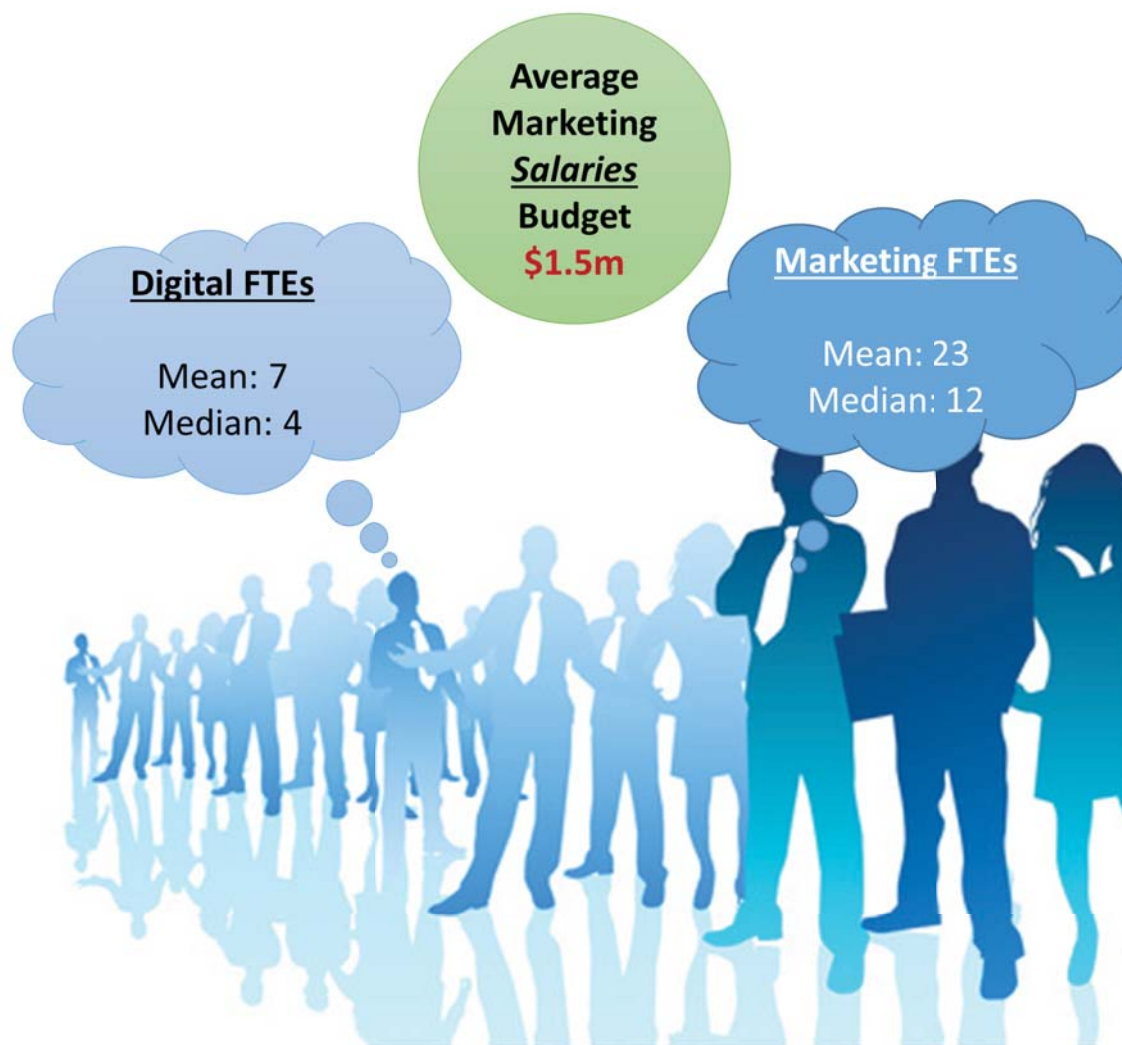
These Budgets are Part of the Overall Marketing Budget



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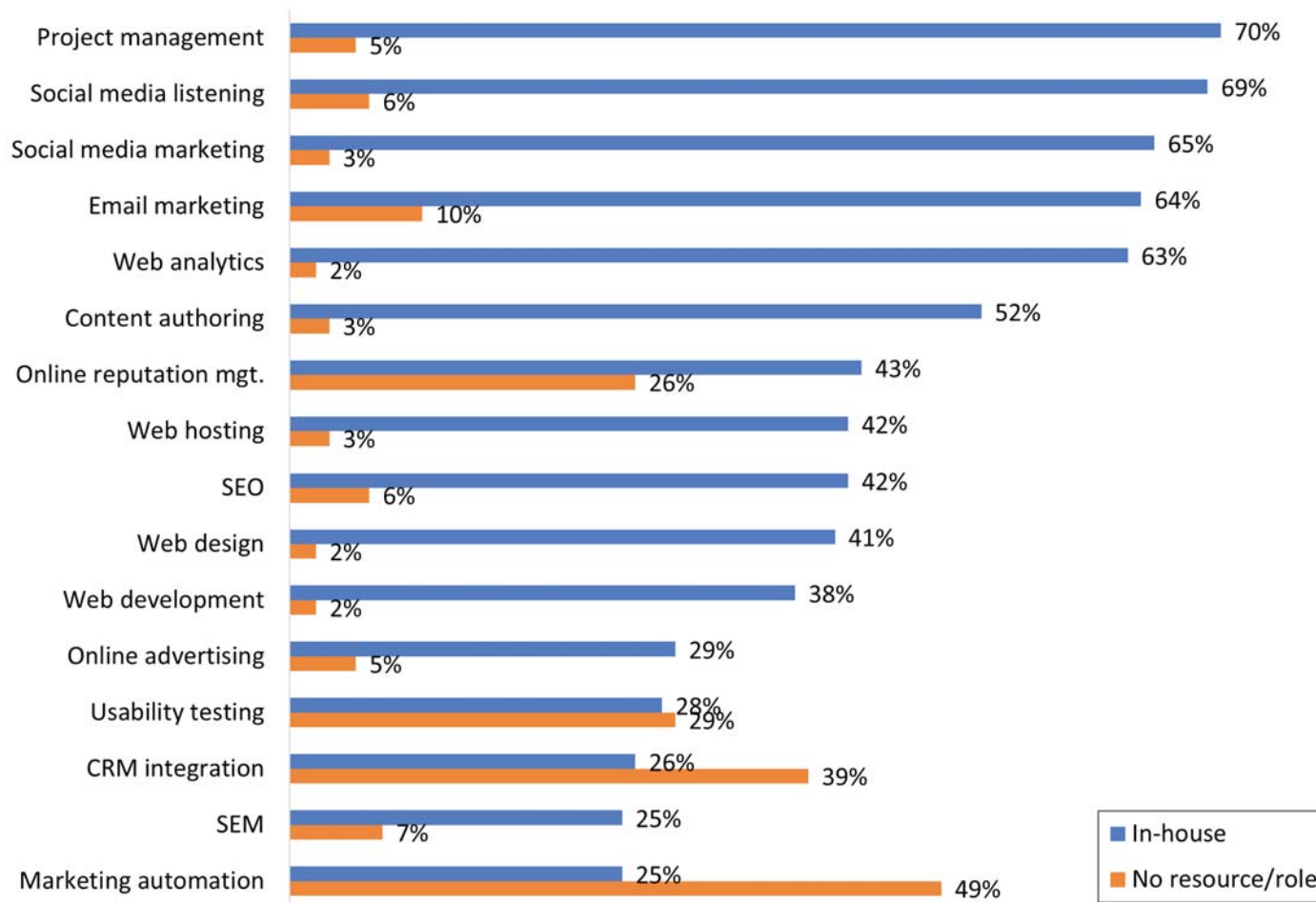


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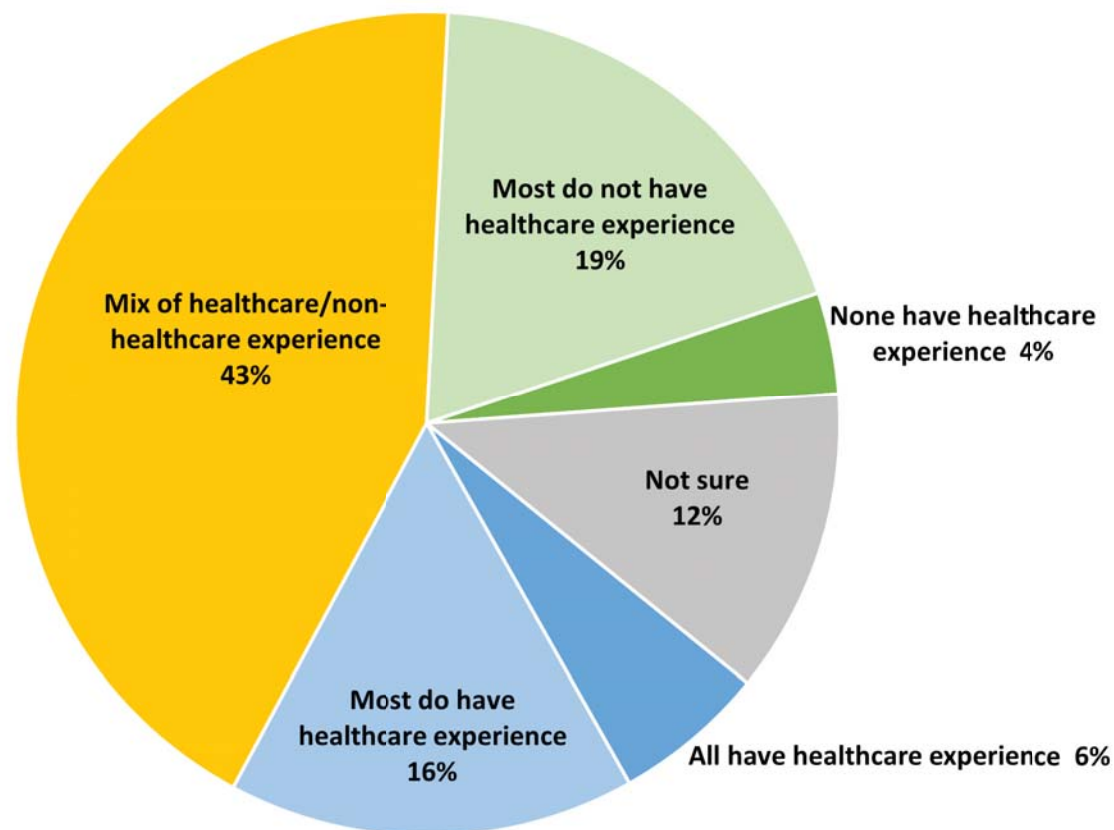
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Web and Interactive Marketing Roles Performed In-house



41

Hire Digital and Interactive Talent From Healthcare?



Greystone.Net

Founded in 1996, Greystone.Net provides education, consulting services and products that are the innovation through which we build skills and capabilities and develop knowledge capital for healthcare organizations. We were formed with a vision of how both classic and interactive marketing techniques could transform the way healthcare organizations interact with patients, consumers, physicians, employees and others. Throughout its history, Greystone has expanded its offerings and capitalized on evolving trends and technologies to benefits its clients. We have worked with hundreds of hospitals and health systems as they strive to develop, implement and integrate interactive marketing strategies. Learn more at www.greystone.net.

About Klein & Partners

A knowledge leader you can trust: Rob Klein is a recognized expert in healthcare market research and brand management. His focus on staying abreast with developments in healthcare, brand management, and marketing research ensures information that will keep you one step ahead of the competition. When you work with Klein & Partners, there is no language barrier. You can be assured of strategic and tactical counsel well beyond the numbers. A more than 20 year commitment to and passion for healthcare marketing research (and golf) led to Klein & Partners 11 years ago. Over those three decades, Rob has provided research and brand consulting to many leading hospital, system, and health plan brands in the country. Visit www.kleinandpartners.com.

Sitecore

Sitecore is the global leader in customer experience management. The company delivers highly relevant content and personalized digital experiences that delight audiences, build loyalty, and drive revenue. With the Sitecore® Experience Platform™, marketers can own the experience of every customer who engages with their brand, across every channel. More than 4,400 of the world's leading brands—including American Express, Carnival Cruise Lines, easyJet, and L'Oréal—trust Sitecore to help them deliver the meaningful interactions that win customers for life. For more information, visit www.sitecore.net.