



**Wave 6:**  
*State of Digital  
Marketing in  
Healthcare Report*

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# Introduction

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*The Why and How*



# Introduction

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As this introduction is being written in April 2021, we reflect on the impact of the COVID-19 pandemic on the healthcare industry and specifically the marketer's role. Little did we know, as we released the 5<sup>th</sup> Wave survey results in February 2020, that events of the coming year would greatly impact marketing priorities, staffing and spending.

Even though 2020 and early 2021 were both challenging and different, we proceeded with Wave 6 of the survey so the industry could continue to understand the changing use of digital marketing techniques. Although we only asked a few questions about the pandemic, this report shows the impact of the pandemic on the industry.

**The bottom line:** the pandemic expedited the pace of digital transformation in healthcare, which will be felt for years to come. And since the speed of change is unlikely to slow, this year, more than others, marketers must keep pace.

The results of Wave 6 follow. To assess changes from prior years, some questions were repeated, and a few new ones were added. The survey results represent a continuing effort to better understand the changing dynamic of healthcare marketing.



## Introduction, *cont'd.*

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In total, **185 healthcare marketers and digital professionals were surveyed** from various healthcare organizations including small community hospitals, academic medical centers, children's hospitals and large health systems with multiple sites. They provided insights on their current use of digital marketing and their expectations for 2021 and beyond.

This report analyzes and discusses the results of the 6<sup>th</sup> Wave of the Annual Healthcare Digital Marketing survey. It provides valuable insight for CEOs, CMOs, web and digital managers and others involved in healthcare marketing to assess the current state of their organization's digital marketing efforts, future plans and compare themselves to their peers.

## Methodology

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- ❑ The survey included more than **50 questions**, designed to elicit information pertaining to:
  - The scope of the organization's digital and website activities
  - The importance and effectiveness of the organization's digital marketing efforts
  - Details about the organization's planned future web activities and challenges
  - Details about the organization's marketing resources
  - The organization's classification/demographics.
- ❑ The survey was administered via SurveyMonkey to healthcare organizations from **11/13/2020 – 2/15/2021**.
- ❑ A **sample size of 185** yields a **sample error of +/-6.1%** at the 90% Confidence Level.
- ❑ **Note:** Letters (e.g., A, B, C) and arrows (↑) in charts and tables indicate a statistically significant difference between those two data points at the 90% Confidence Level.
- ❑ **Note:** Wave 6: late 2020 and early 2021, Wave 5: 2019, Wave 4: 2018, Wave 3: 2017, Wave 2: 2016, Wave 1: 2015.

## Demographic Profile

Demographics	2015 Wave 1	2016 Wave 2	2017 Wave 3	2018 Wave 4	2019 Wave 5	2020 Wave 6
<b>Organization Type</b>						
Health system	47%	47%	38%	45%	33%	37%
AMC	21	25	23	18	26	25
Community hospital	11	15	26	20	15	12
Children's hospital	6	5	5	8	6	8
Cancer center	2	1	3	4	5	3
<b>#Beds</b>						
<200	20%	15%	20%	18%	16%	17%
200-499	19	21	26	20	26	23
500-999	29	27	25	30	25	27
1,000+	32	37	29	32	34	33
<b>Title</b>						
Director of Marketing	14%	15%	14%	10%	16%	14%
Chief Marketing Officer	5	14	3	2	1	4
Marketing Manager	13	13	18	20	30	15
VP of Marketing	8	10	8	8	6	5
Dir of Interactive/Digital Marketing	12	9	10	11	8	15
Web Manager	16	8	10	13	12	12
Chief Digital Officer	0	5	1	1	1	1
Director of Web Services	5	3	5	4	3	6
Webmaster	6	3	3	4	2	3
Chief Experience Officer	0	3	1	1	1	1
Other	21	15	28	28	22	25
11+ years in healthcare	47%	47%	47%	49%	47%	Avg=14 yrs

## Executive Summary

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*Overview of the Key Findings*





## Executive Summary

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This report shares the results of Wave 6 of the Annual Healthcare Digital Marketing Survey administered by Greystone.Net and Klein & Partners. It provides valuable insight for CEOs, CMOs, web leaders, digital managers and others involved in healthcare marketing to assess the current state of their organizations' digital efforts, future plans and compare themselves to their peers.

Healthcare digital marketing continues to steadily grow in importance and sophistication. This survey is designed to measure the effectiveness of digital marketing, and to help identify trends and challenges faced by the industry. The results represent an effort to help healthcare marketers understand the current state and prepare for the future.

The Healthcare Marketing Confidence Grade is included again this year, in which survey respondents graded the effectiveness of their own marketing efforts in the areas of CRM, social media, website strategy and development and digital marketing. The good news is healthcare marketers are feeling slightly more confident about their digital efforts, even during COVID.



## Key Takeaways

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- ❑ The primary digital marketing activities undertaken by hospitals and healthcare systems remain unchanged but there has been a significant uptake in the use of Twitter and a decrease in the use of mobile marketing.
- ❑ The two largest online advertising vehicles used in healthcare are Facebook and Google Ads, although local websites and streaming music sites are growing in use.
- ❑ The top five social media channels used in healthcare are Facebook, LinkedIn, YouTube, Twitter and Instagram, all now being used by more than 90% of respondents. The use of blogs to communicate has exceeded 75% of respondents. All social media channels continued to grow through the COVID period.
- ❑ Boosting Facebook ads and Google ads has remained constant over the past three years, although the use of LinkedIn promotions, Instagram sponsored ads and promoted tweets have all declined significantly.
- ❑ Multiple forms of content marketing became more important during the pandemic, including the increased use of social media.
- ❑ The top four CMS software systems used in healthcare are WordPress, Sitecore, Healthgrades and Drupal.

## Key Takeaways, *cont'd.*

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- ❑ SharePoint continues to be the most common platform for intranets in healthcare with nearly a 50% market share.
- ❑ The use of CRM in healthcare continues to tick upward with roughly 67% of respondents reporting they have a CRM system.
- ❑ Of that number, Healthgrades is the prominent provider, with a 47% market share, followed by Salesforce at 24%. All other players are in the single digits. Integration of the CRM system with the institutional website still seems to be illusive with only 17% saying it is well integrated. However, this number is up from 12% in Wave 5.
- ❑ Of the 33% of respondents without a CRM, ~35% foresee implementing one in the coming year. This is up from 26% in Wave 5.
- ❑ CRM is being used most frequently to manage campaigns and lists; conversions and encounters are the main metrics.
- ❑ Nearly half of respondents (48%) using CRM self grade their deployment level as intermediate, another 33% consider themselves as beginners and only 13% grade themselves as advanced. There is room to grow in the sophistication of healthcare's use of CRM.
- ❑ Likewise, there is still room to improve the overall CRM experience for providers in healthcare. A high percentage of respondents indicate they did not have an Excellent or Very Good Experience with various aspects of their CRM.
- ❑ About a quarter of all respondents are using CRM to support population health initiatives.

## Key Takeaways, *cont'd.*

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- ❑ The use of a Physician Relationship Management (PRM) system is significantly lower, hovering around the 30% mark for the last 4 survey waves, with limited interest in implementing a system in the near term. Salesforce is the most used PRM in healthcare.
- ❑ Just less than half the respondents use a Marketing Automation tool, with the most used tools being Salesforce Marketing Cloud followed by the tools offered by their CRM Vendor. These tools are most used for streamlining the email marketing process (although that task is lessening in use) and creating relationships. There is a growing use of Marketing Automation Tools to test variables.
- ❑ The most used email systems in healthcare include MailChimp, Salesforce Marketing Cloud and Constant Contact.
- ❑ The pace of change in platforms has slowed; however, approximately half of respondents are planning a website redesign.
- ❑ Google Analytics and Facebook Page Insights continue to be the most used tools to measure digital return on investment (ROI) in healthcare. Metrics most used as KPIs include pageviews, click through rates and social media engagement growth, and transactional data – *like scheduling appointments and registering for online classes/events* – are growing in importance.

## Key Takeaways, *cont'd.*

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- ❑ Approximately 61% of website visitors use a mobile device to access hospital or healthcare system websites.
- ❑ Nearly 28% of respondents indicated that their website has a chat function.
- ❑ Just shy of 60% of respondents have a mobile app for consumers primarily used to provide facility information, access to the patient portal and to find and make physician appointments.
- ❑ Over the past year, healthcare has made significant progress in impacting the effectiveness of privacy and ADA/W3C compliance.
- ❑ One thing that marketers learned in the last year is that web and digital tools can be effective in improving brand image and managing during a crisis.
- ❑ As we move into 2021, not surprisingly, the primary marketing goals for the coming 6-9 months are to stabilize/drive volume to physician and services and to restore the public's trust in coming back safely to a healthcare setting. And the predominant target audience for the same period is specialty care patients in select services.
- ❑ Also not surprising, 33% of respondents indicated they will continue to market virtual visits aggressively and another 55% said they will continue to market virtual visits as a part of the marketing mix. Virtual visits are here to stay.



## Key Takeaways, *cont'd.*

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- ❑ During COVID, most of the usual barriers/challenges were less of an issue to healthcare marketers.
- ❑ The top two pressing issues for healthcare marketers changed in the past year to budget (which moved up significantly) and getting the needed FTEs. Past years' issues – personalization and ROI – dropped down the list of issues significantly. Concern over content marketing also significantly increased in the last year.
- ❑ The median marketing budget from Wave 6 respondents was \$3.5m, up from \$2.75m in the previous survey. The proportion of those funds allocated toward website tasks and digital marketing (19% and 30% respectively) remained stable when compared to the previous two years.
- ❑ Optimism is not as strong for 2021 budgets as we come out of the year with COVID. Clearly, side effects of all kinds will last beyond the pandemic itself.
- ❑ The gap between the marketing budget needed as a percentage of the organization's total revenue grew in the last year, likely a reality hit from COVID. Likewise, the mean number of marketing FTEs declined (38 in Wave 6 versus 55 in Wave 5) and below the number needed to be effective.
- ❑ Approximately 56% of marketing efforts are committed to non-COVID services.



## Key Takeaways, *cont'd.*

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- ❑ The web and interactive marketing roles that are most likely to have no resource include app development, website experience survey and CRM integration. The most outsourced roles include digital media buying, SEM and online advertising.
- ❑ Although COVID had a negative impact on healthcare marketing's staff levels and budgets, the good news is that 47% believe marketing has gained newfound credibility, and 40% of those respondents believe it will definitely last.

## Healthcare Marketing Confidence Grade

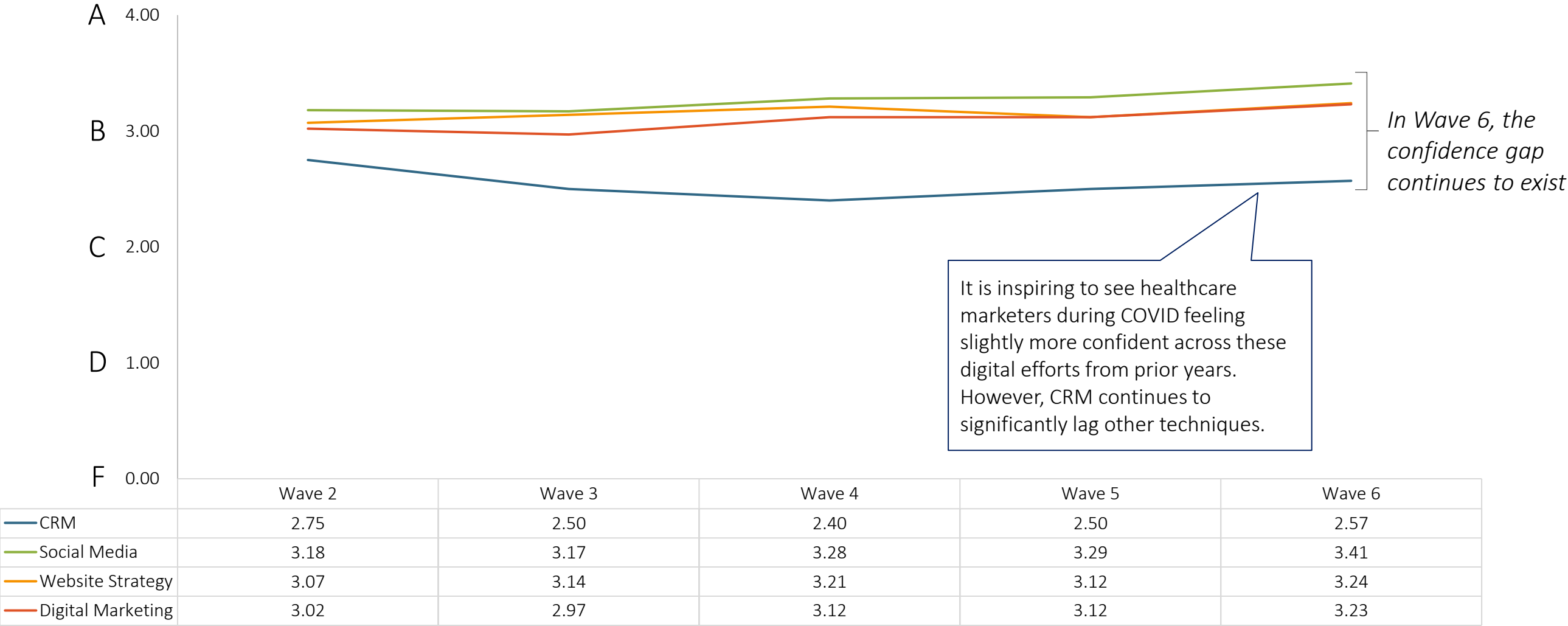
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*How Confident are Healthcare Marketers in their Marketing Strategies?*





# How Healthcare Marketers Grade Their Efforts in ...



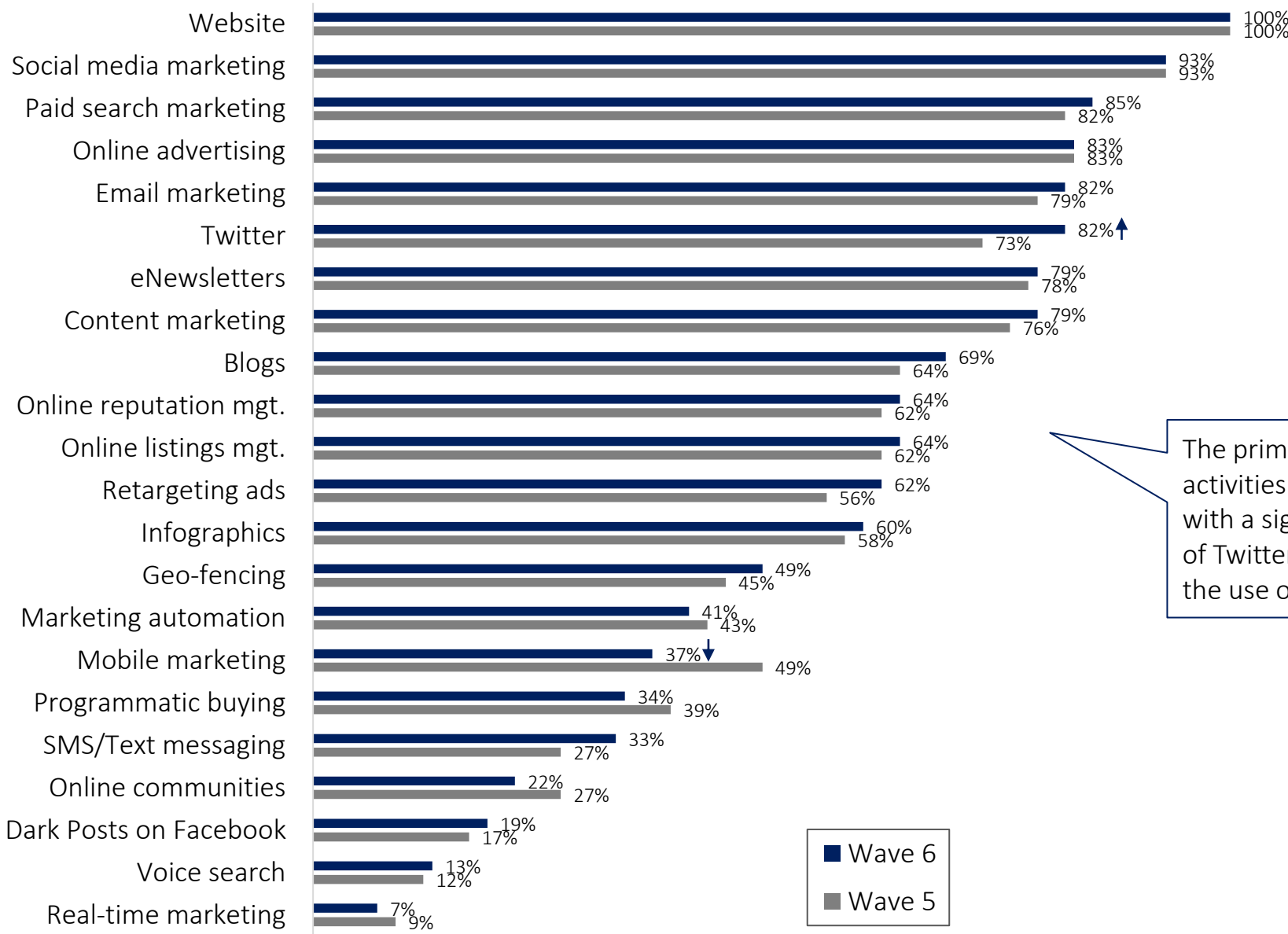
## Online and Digital Marketing Techniques Used

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*What Tools and Techniques Are Being Used*



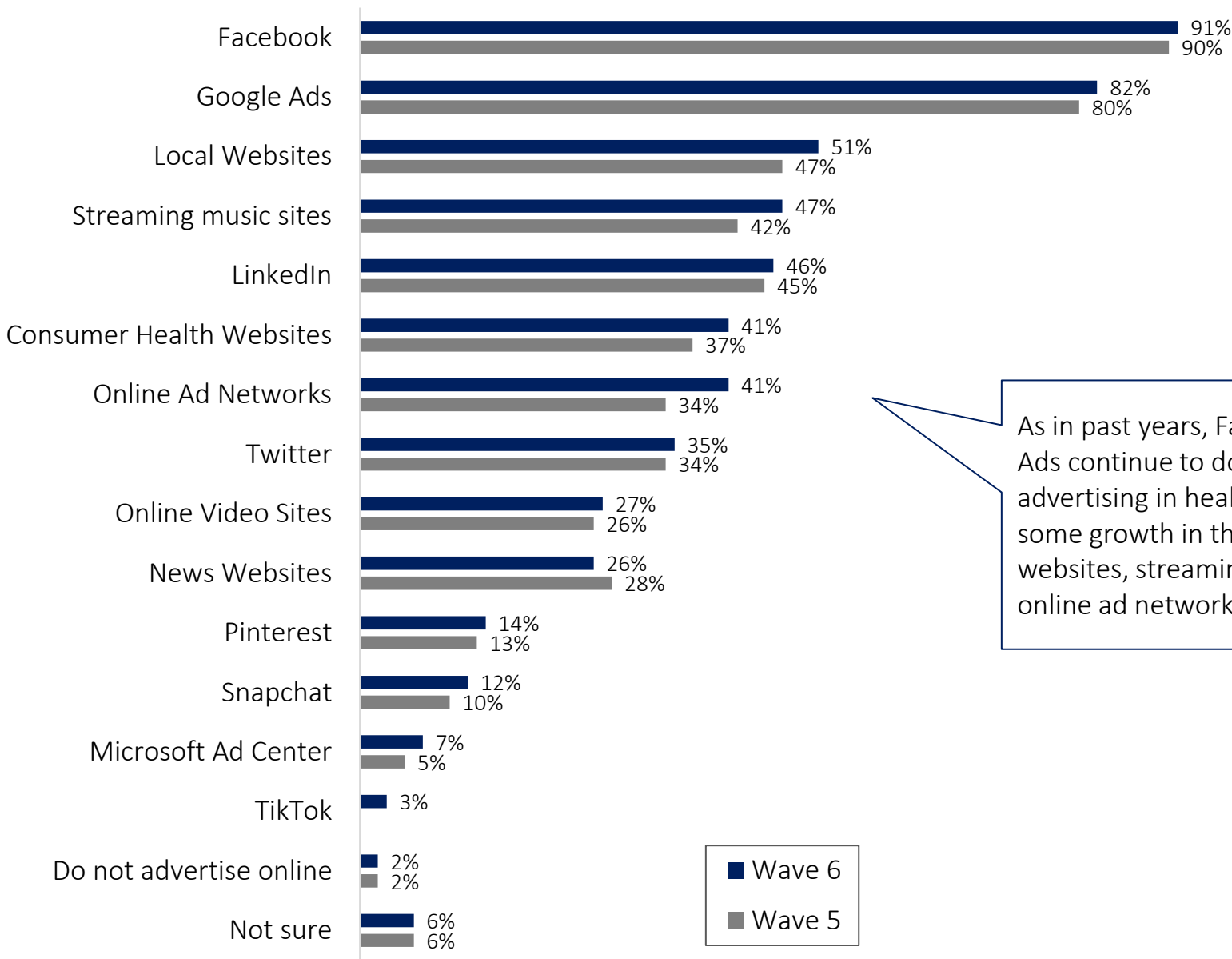
Online/Digital Marketing Currently Used at Hospital/System



The primary digital marketing activities remain largely unchanged, with a significant increase in the use of Twitter and a significant decline in the use of mobile marketing.

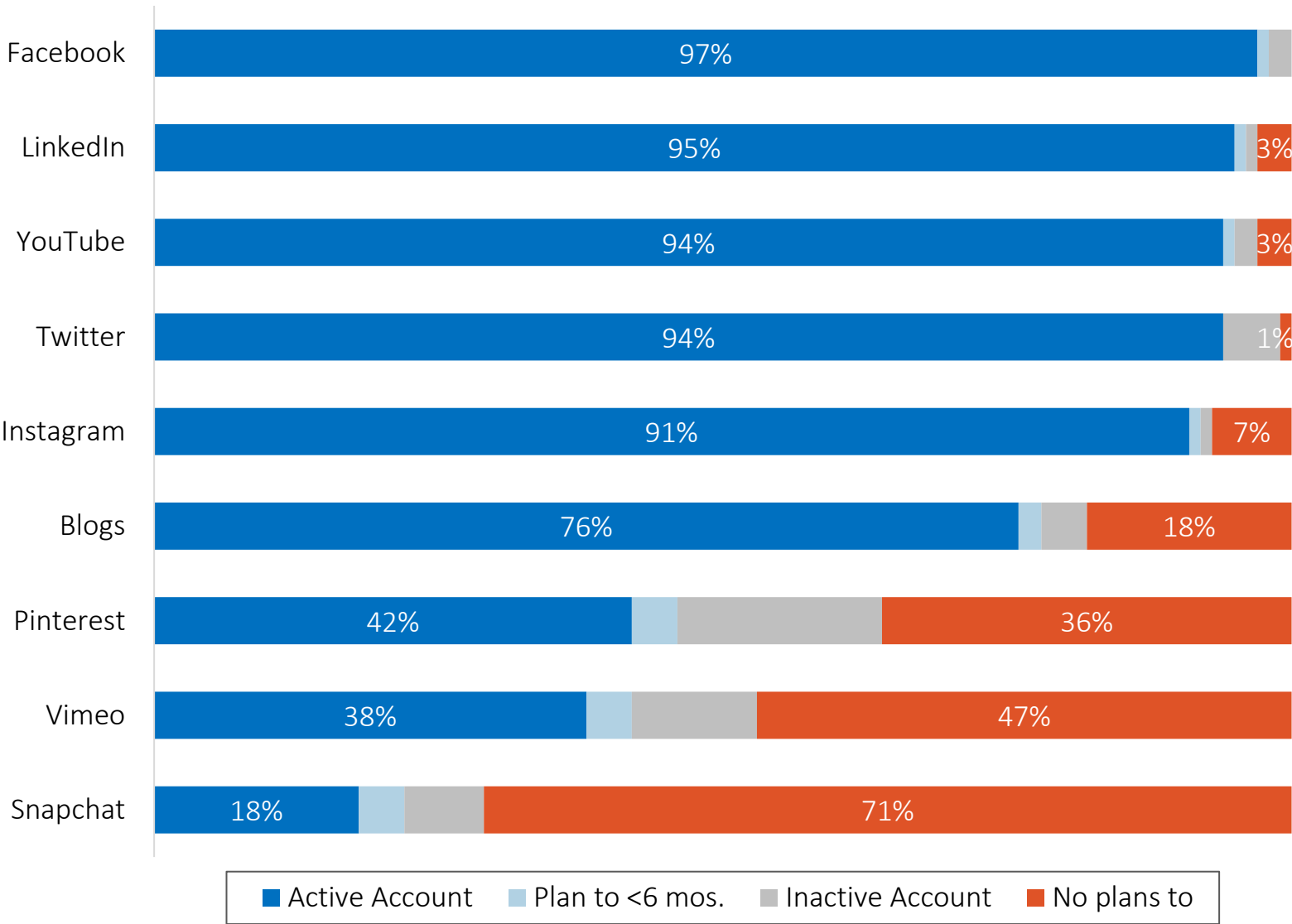
■ Wave 6  
■ Wave 5

Online Advertising Used In Healthcare



As in past years, Facebook and Google Ads continue to dominate online advertising in healthcare. We also see some growth in the use of local websites, streaming music sites and online ad networks.

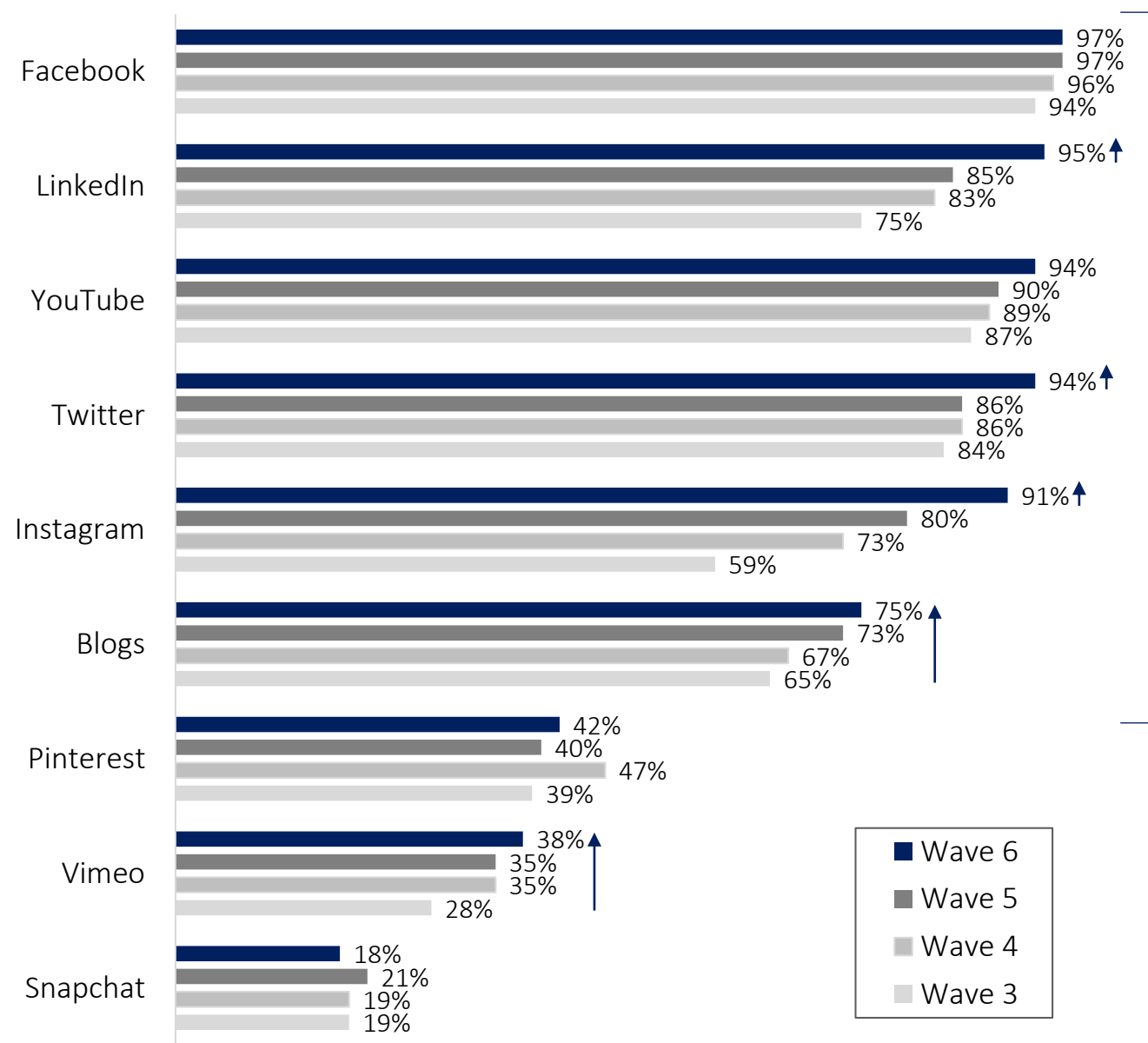
Social Media Channels



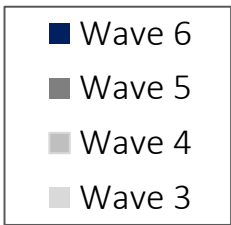
The top five social sites continue to dominate in healthcare, with each one now above 90% use. Blogs are also being used by over 75% of respondents.

Note: Data are from Wave 6

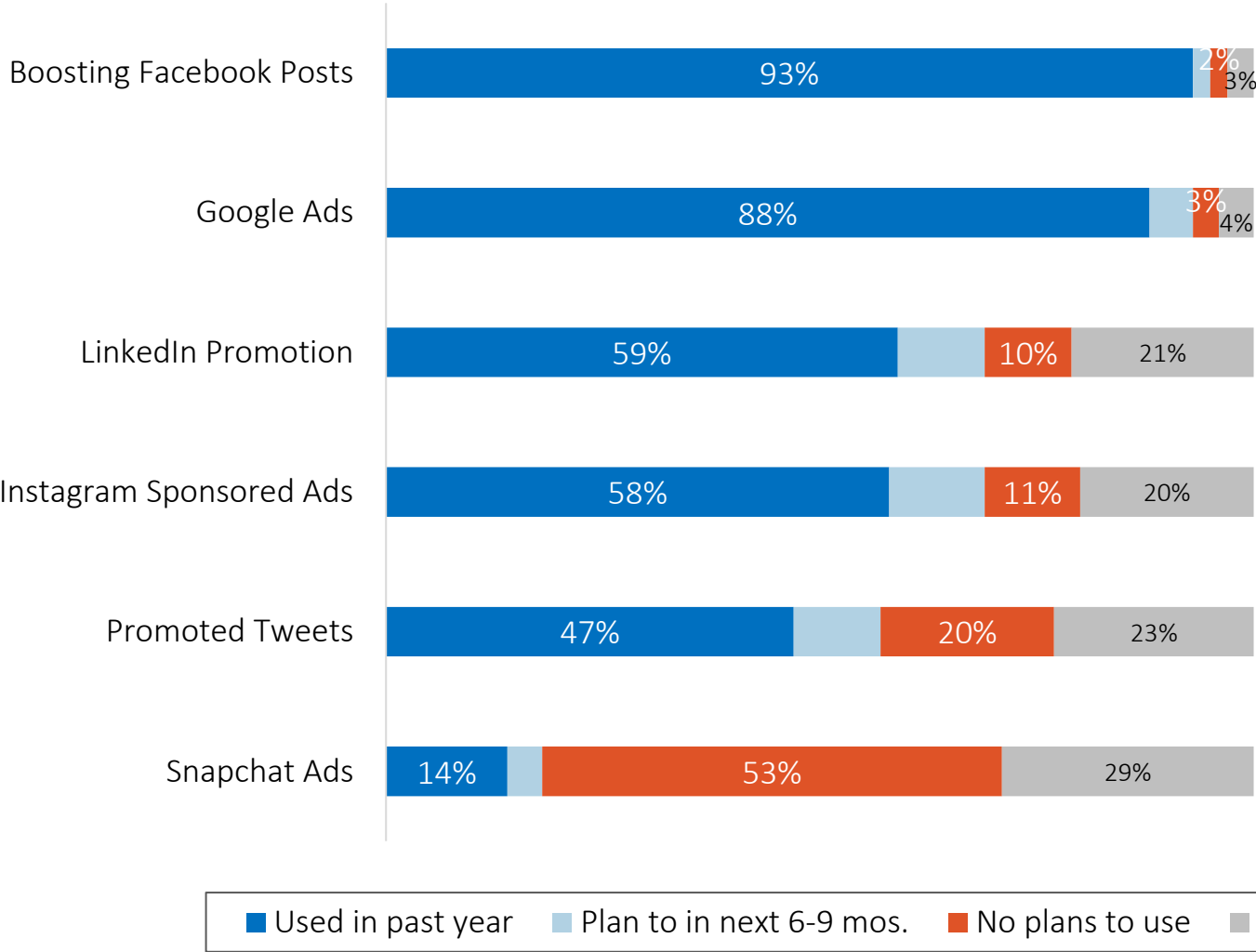
Active Social Media Channel Accounts Over the Years



All these channels continued to grow through COVID

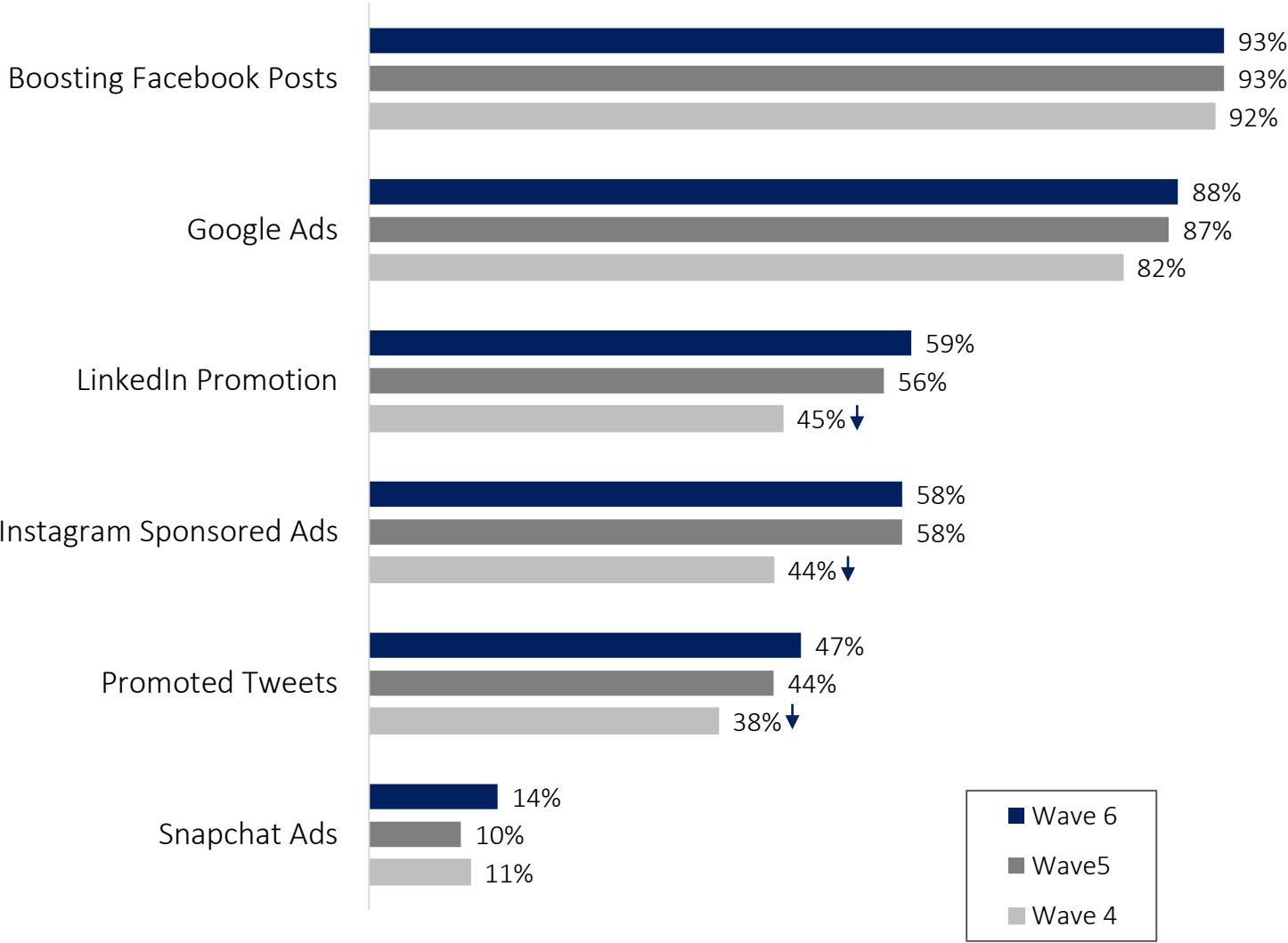


Online Advertising Techniques Used in the Past Year



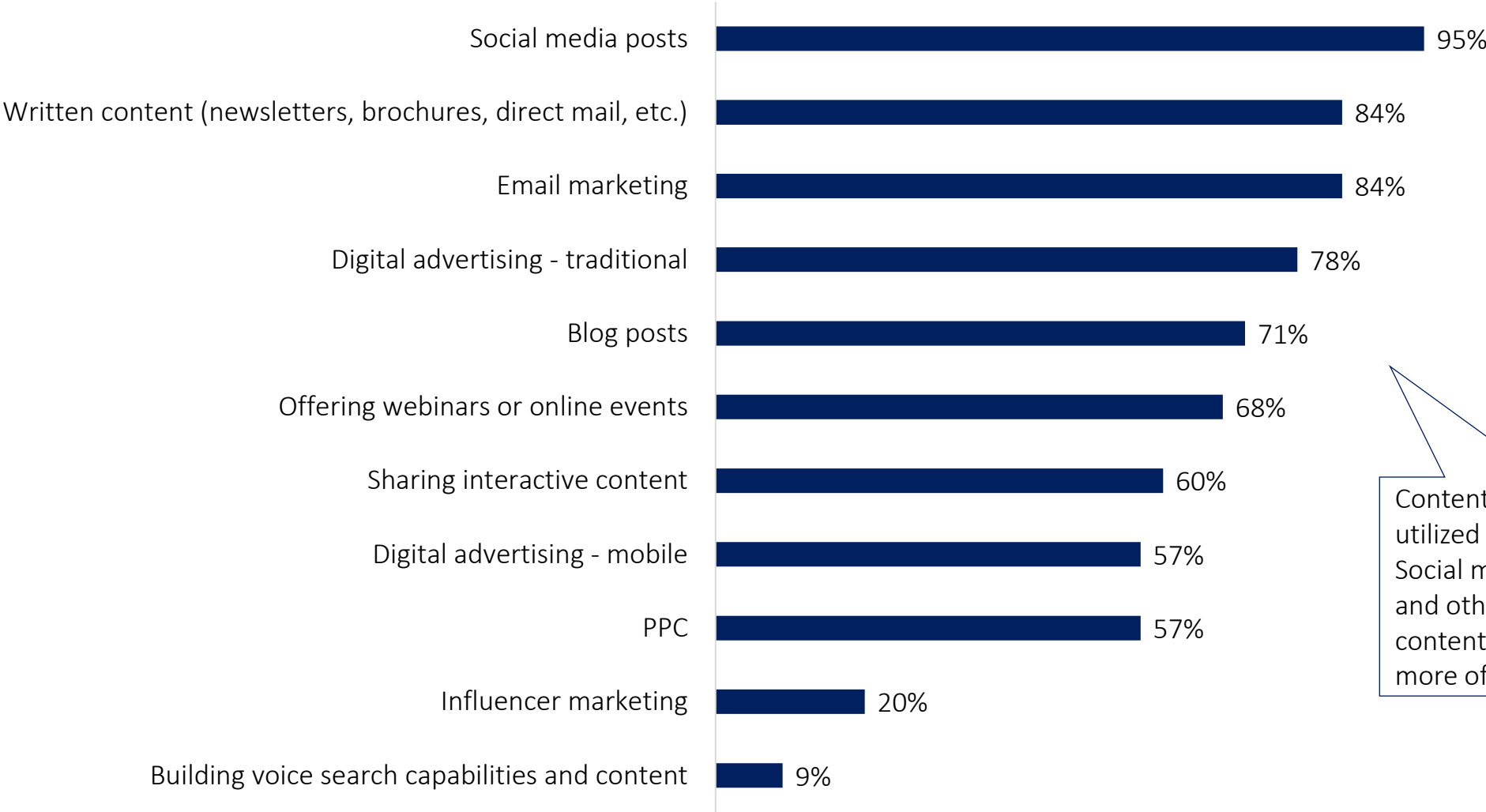
Note: Data are from Wave 6

Online Advertising Techniques Used Compared to Past Years





### Content Marketing Channels Using During COVID to Reach Consumers and Patients



Content marketing was highly utilized during the pandemic. Social media, email marketing and other forms of written content were used by 84% or more of respondents.

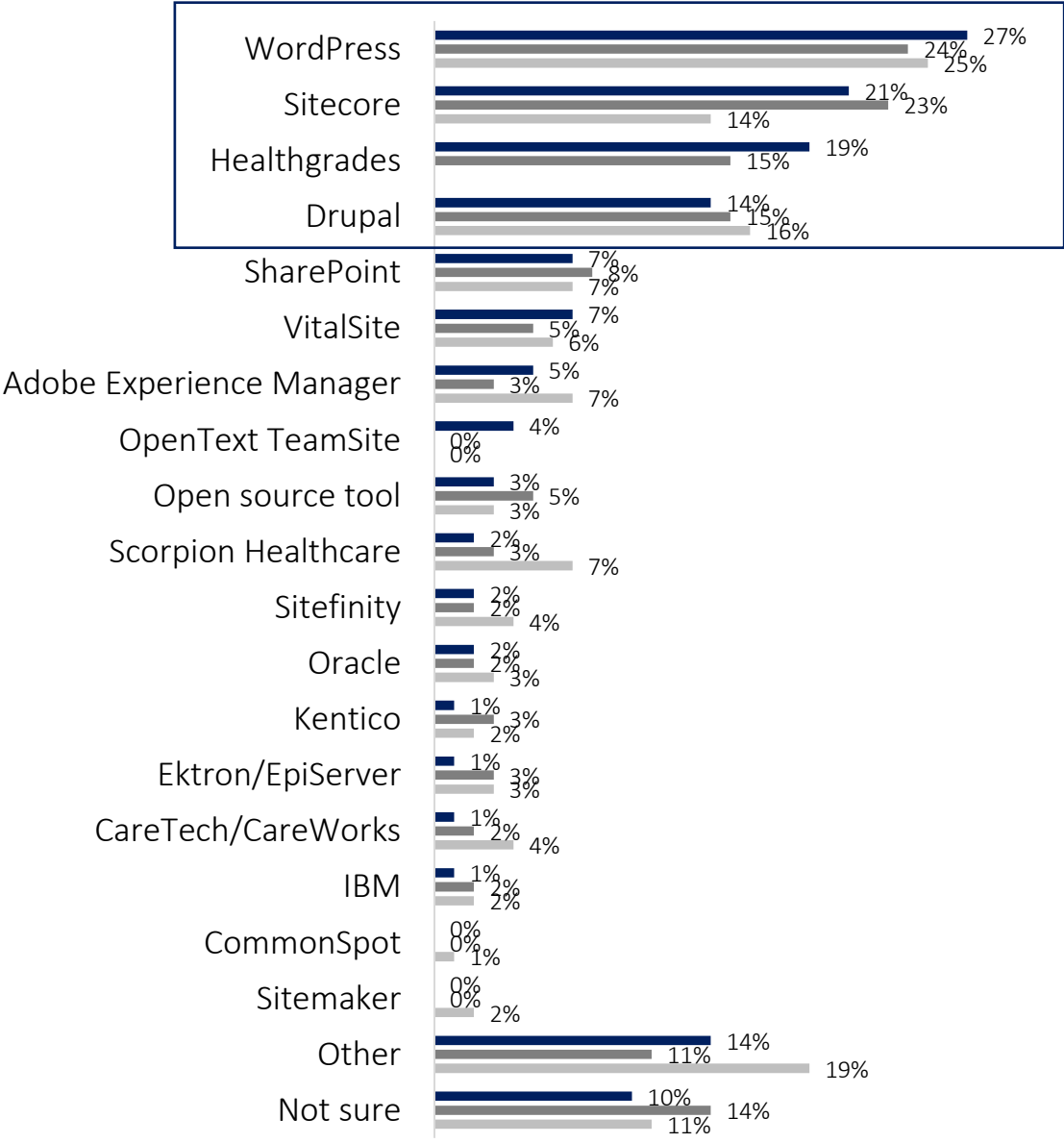
## CMS, CRM and Marketing Automation

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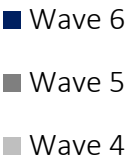
*The Latest Results*



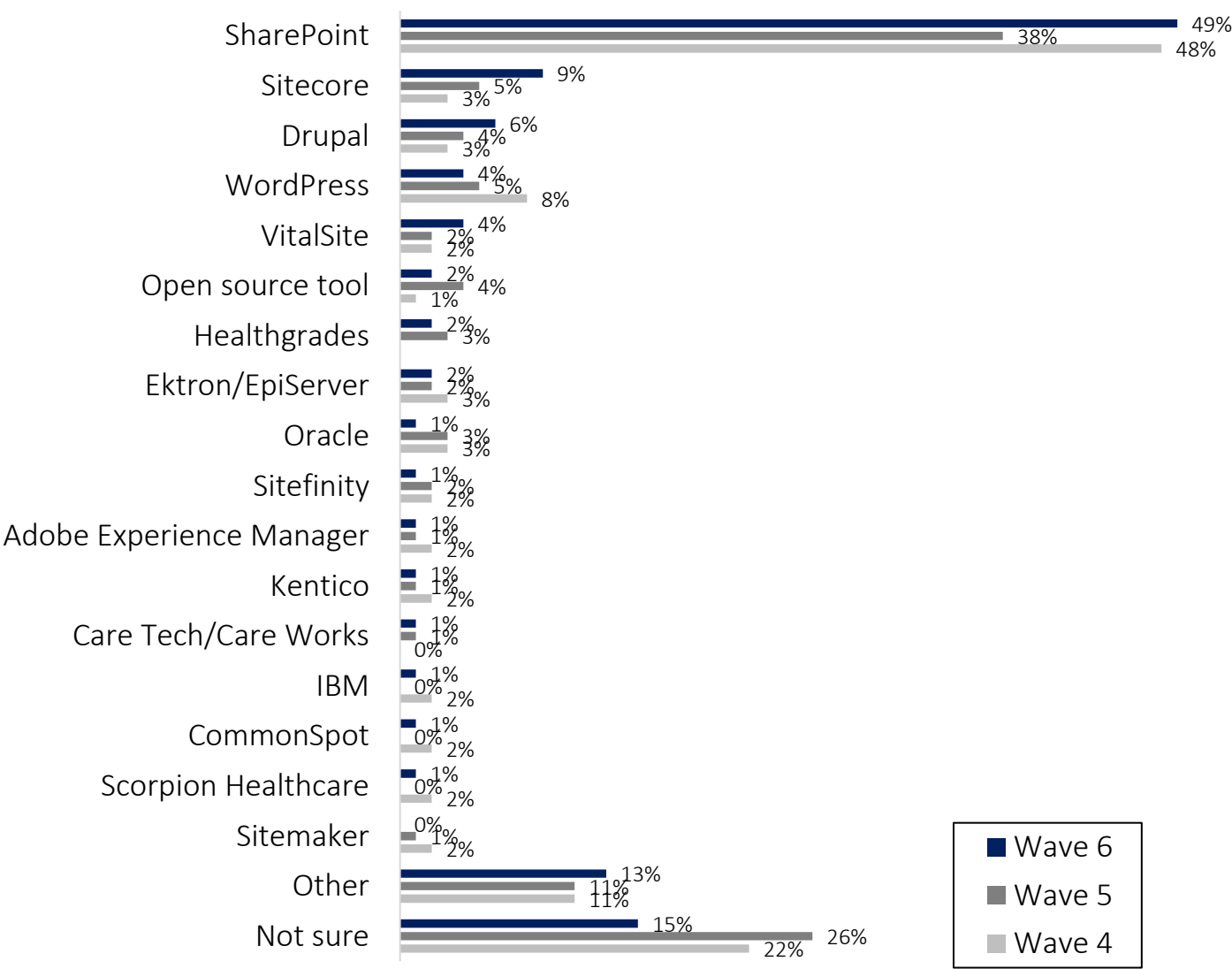
CMS Software Used to Support Website



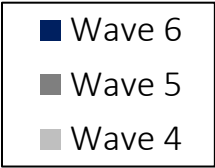
Top CMS platforms for healthcare websites include WordPress, Sitecore Healthgrades and Drupal.



CMS Software Used to Support Intranet

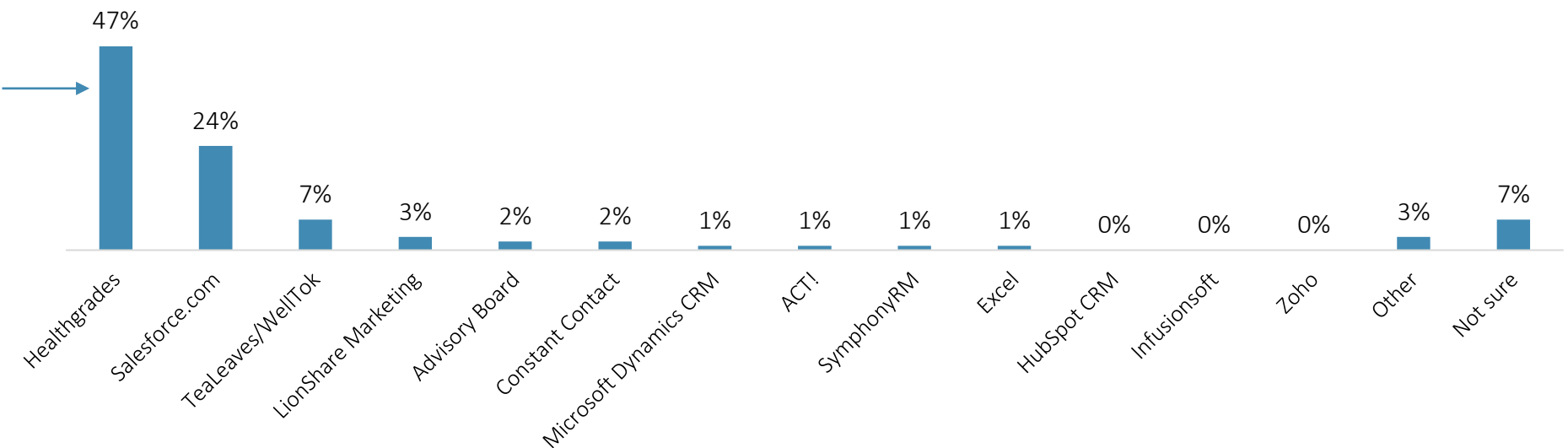


SharePoint continues to be the most used platform for healthcare-based intranets.

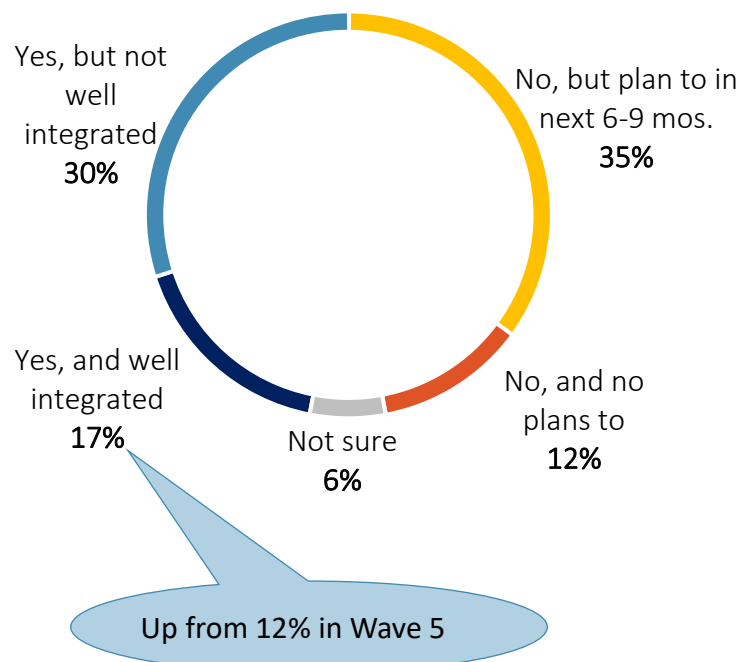


67% Wave 6: Have a CRM System  
Wave 5: 65%  
Wave 4: 59%  
Wave 3: 57%

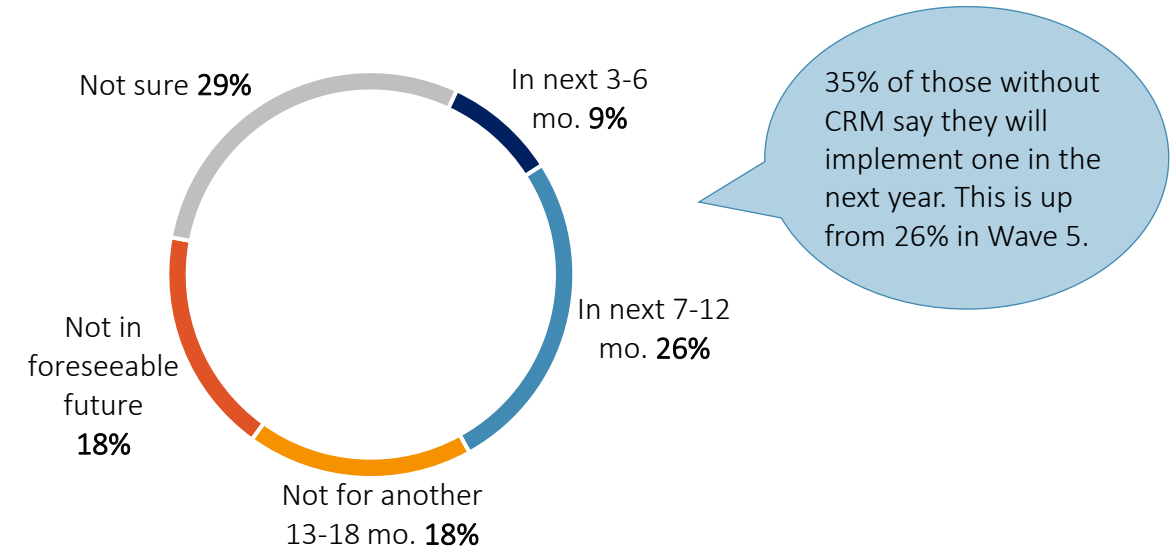
CRM Vendor Used



Website and CRM Integrated

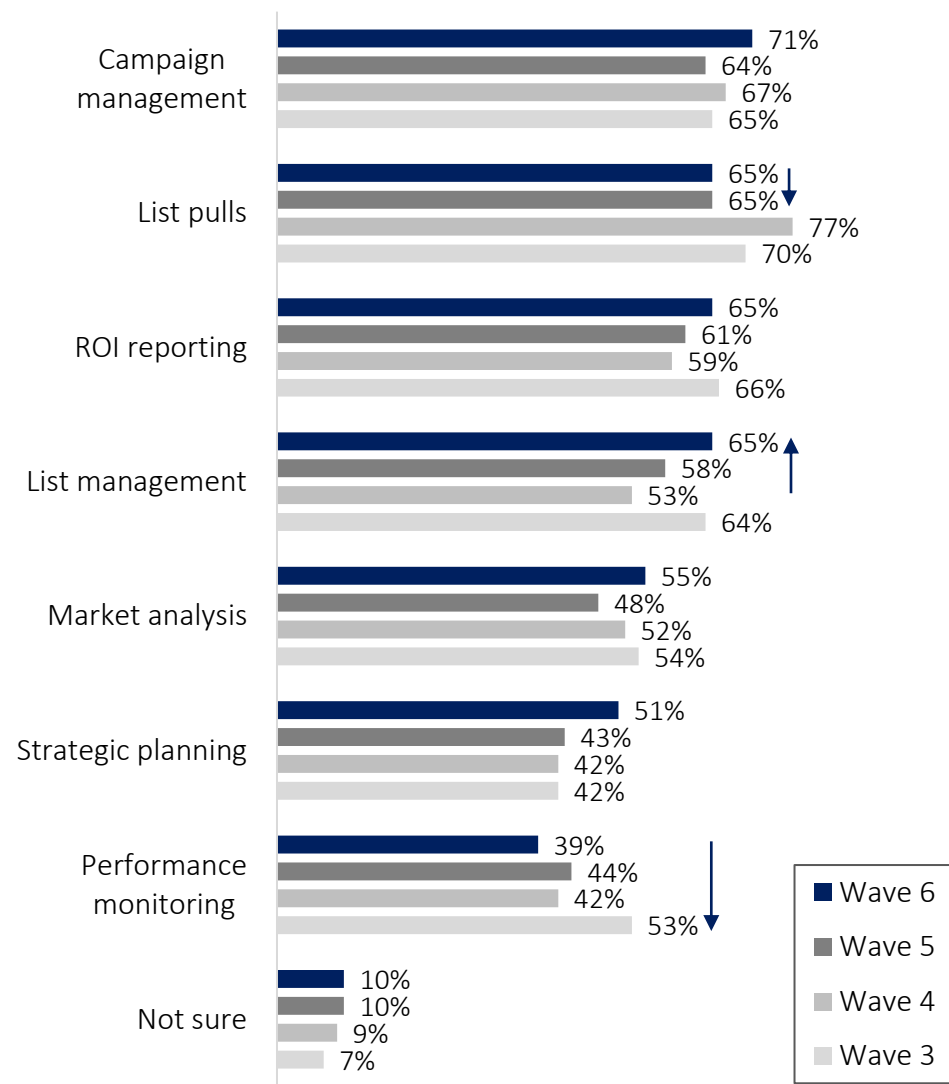


Plans to Implement CRM  
(Among the 33% without CRM)

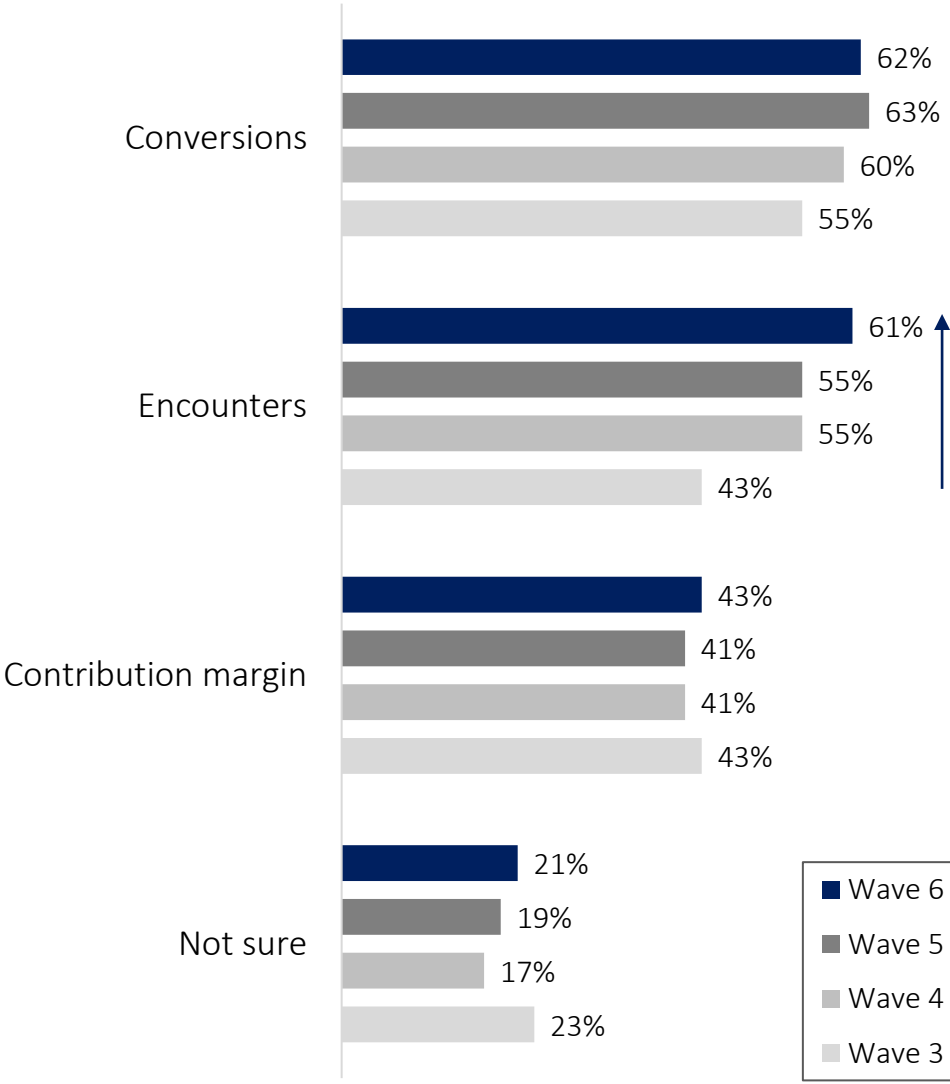


# CRM Uses

Use CRM System for...

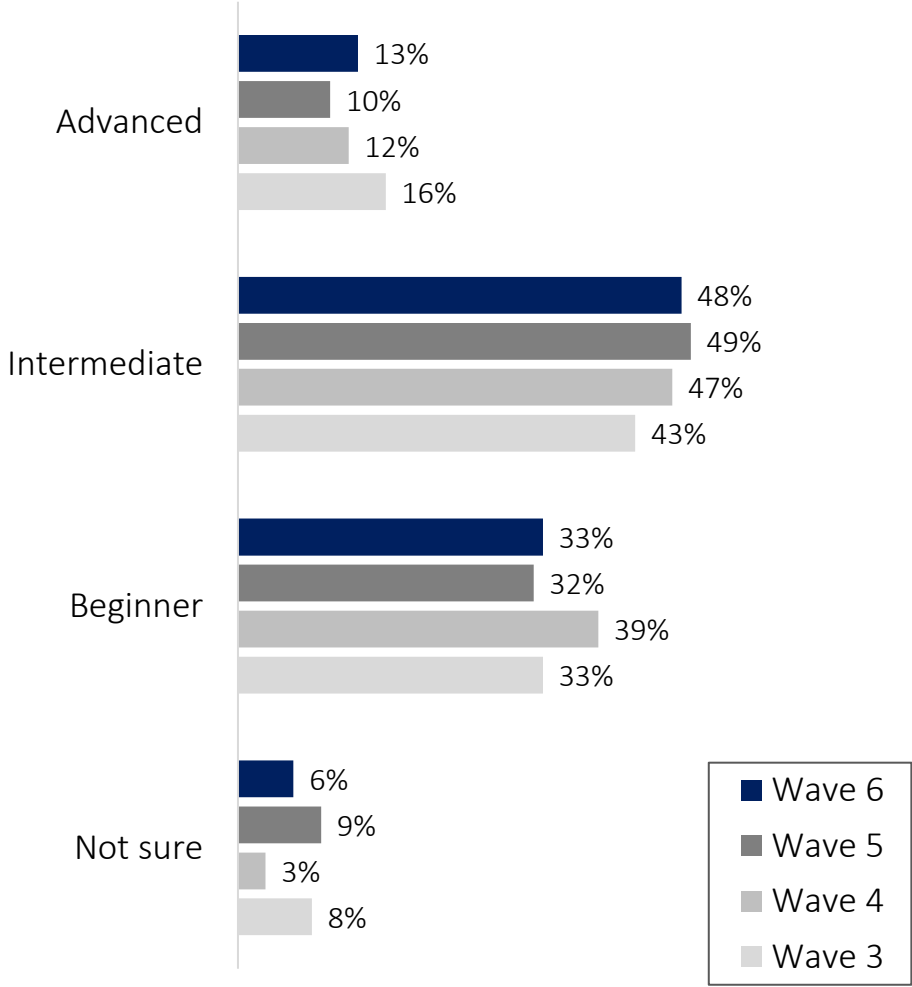


Metrics to Measure CRM ROI



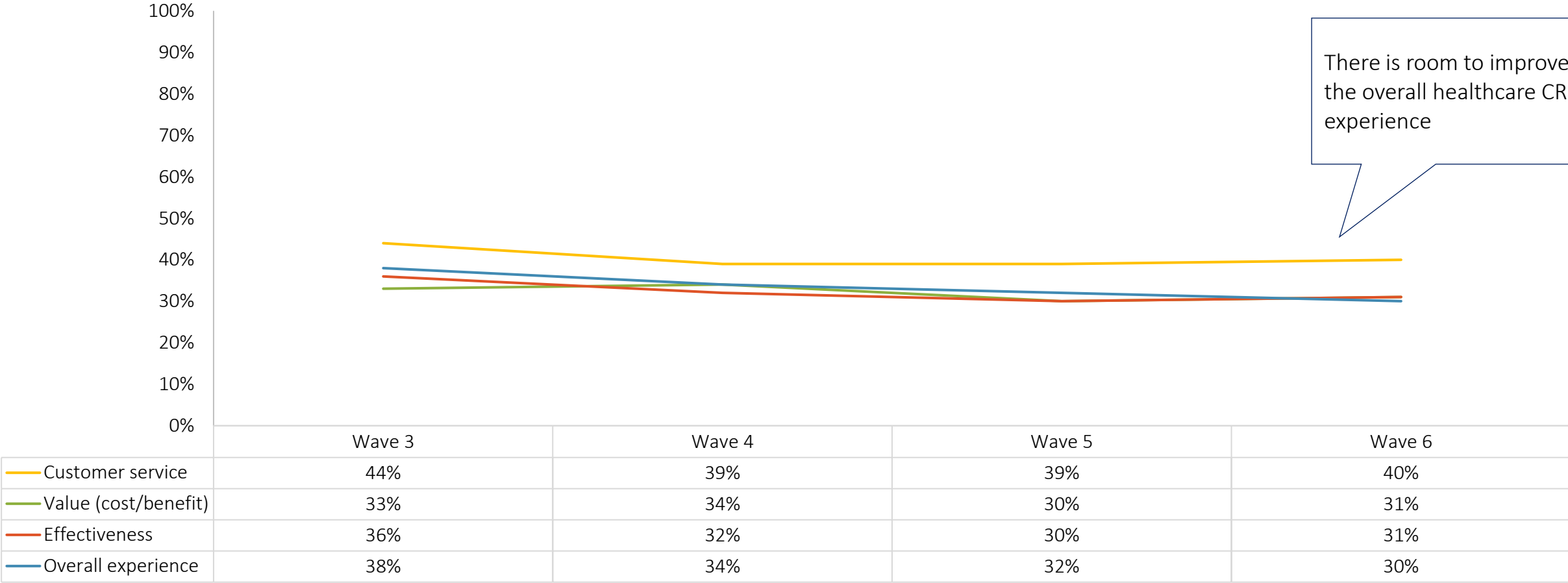
# CRM Level of Deployment

Organization’s “Level” of Deploying CRM



# CRM Experience - Trended

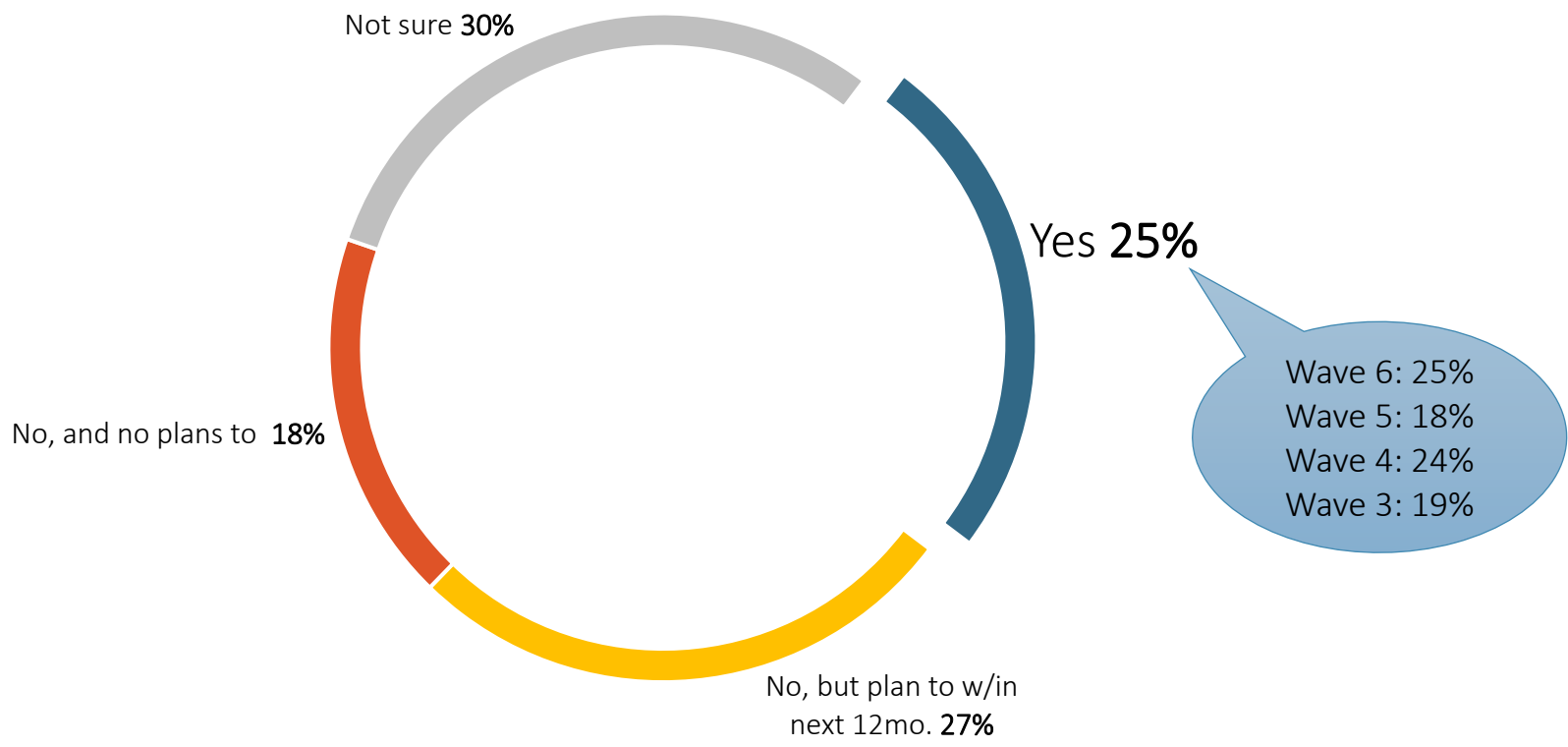
Excellent/Very Good Experience with CRM



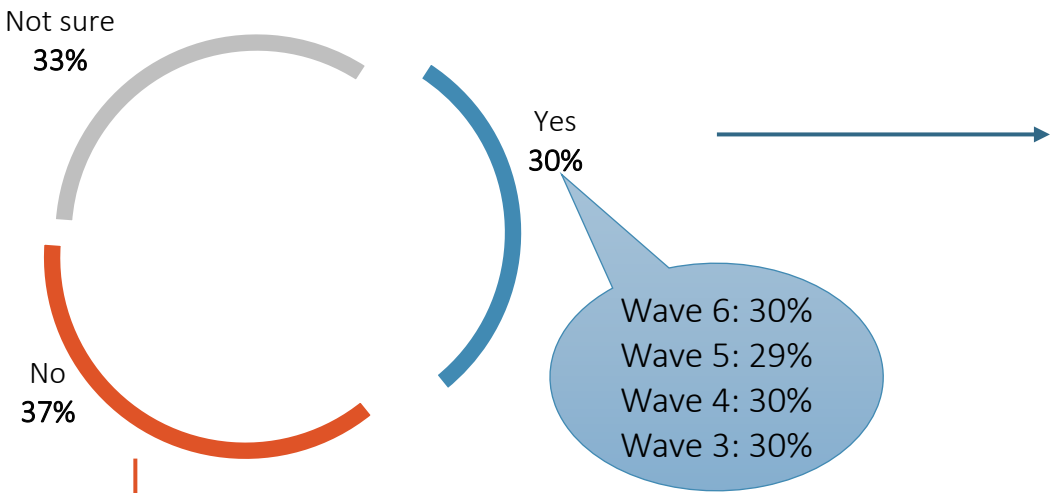


# CRM Integration with Population Health

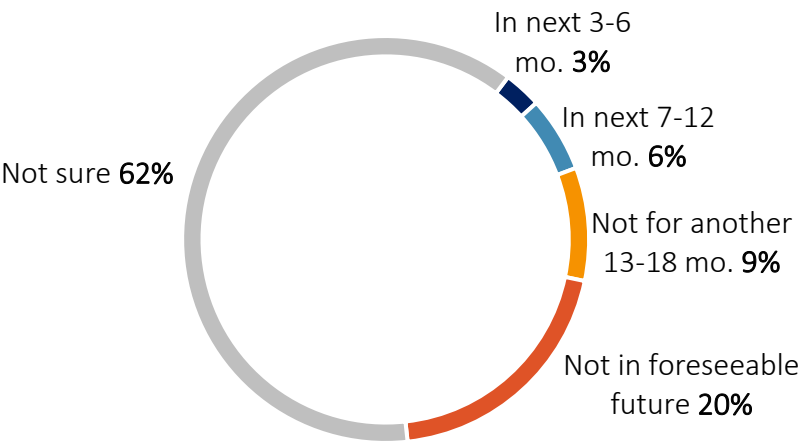
Use CRM to Support Population Health Initiatives



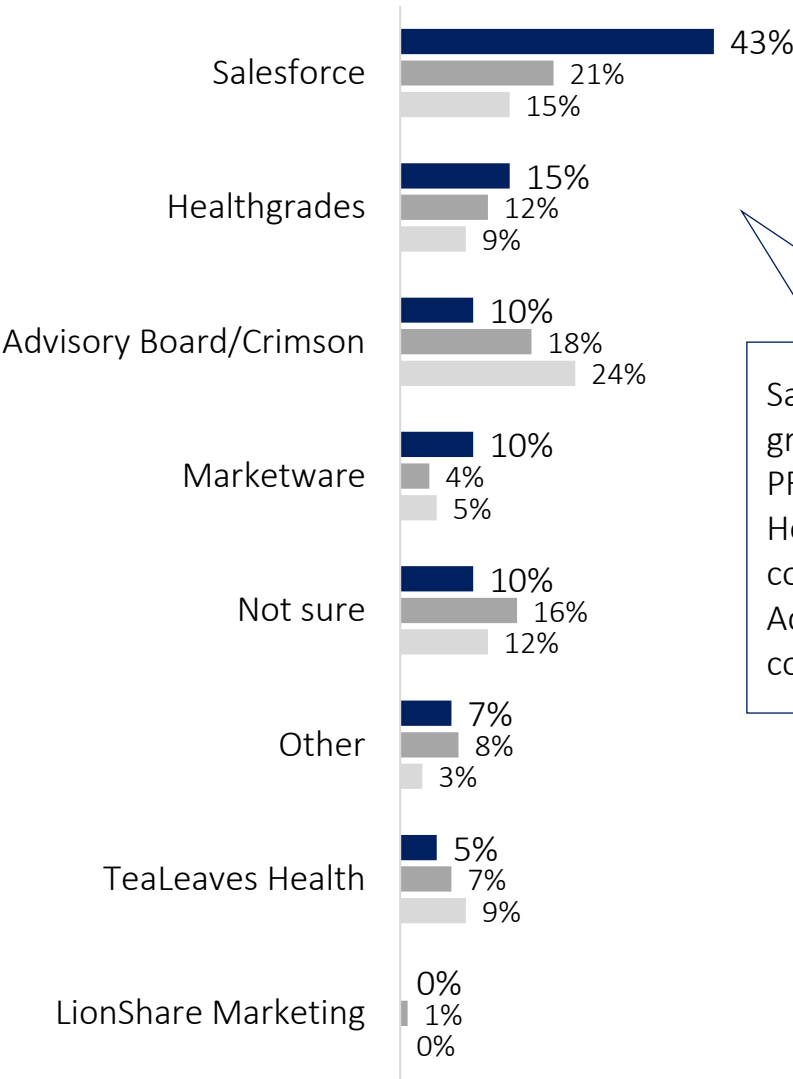
### Use of a Physician Relationship Management (PRM) System



### Plans to Implement PRM

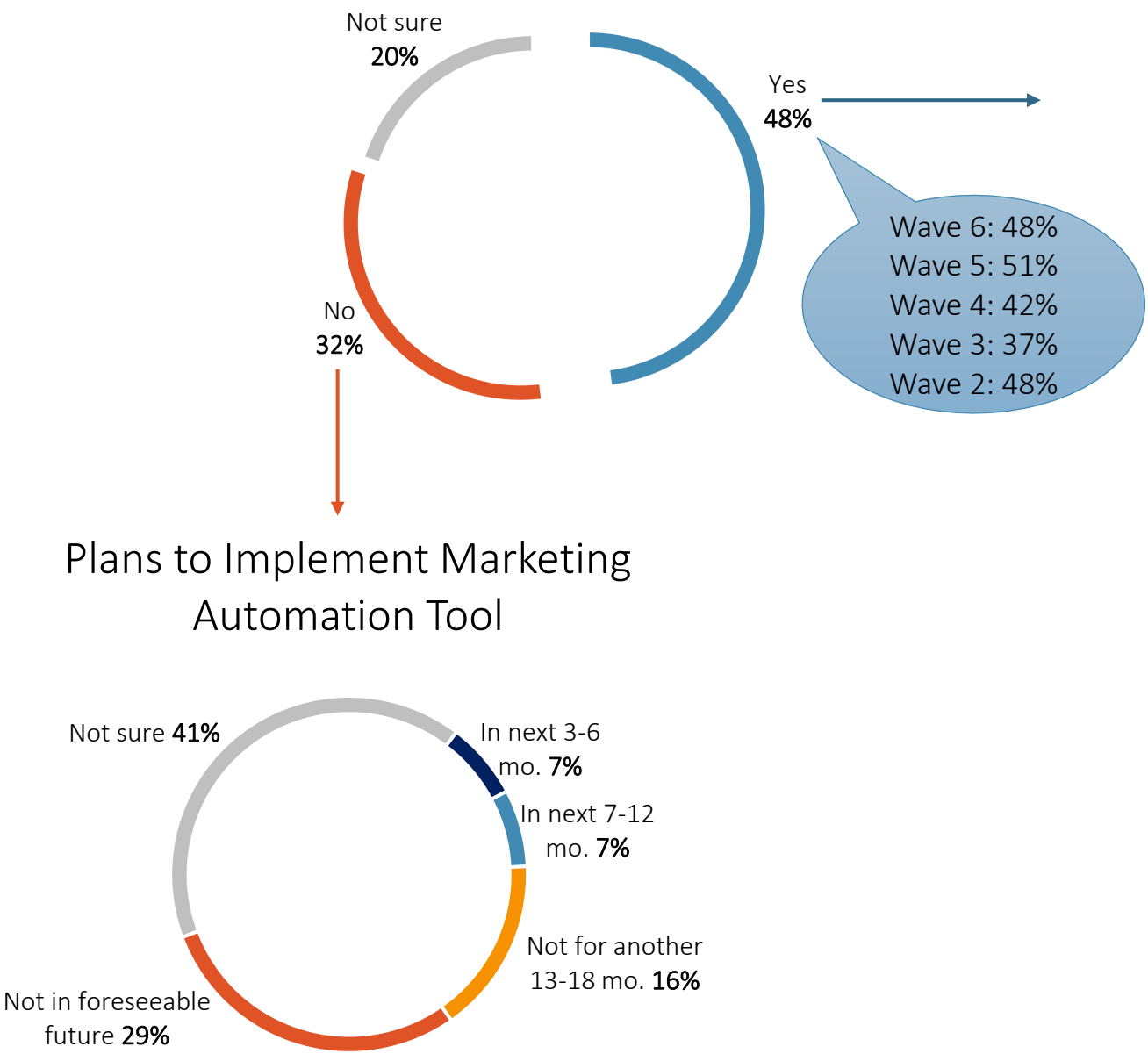


### PRM Vendor

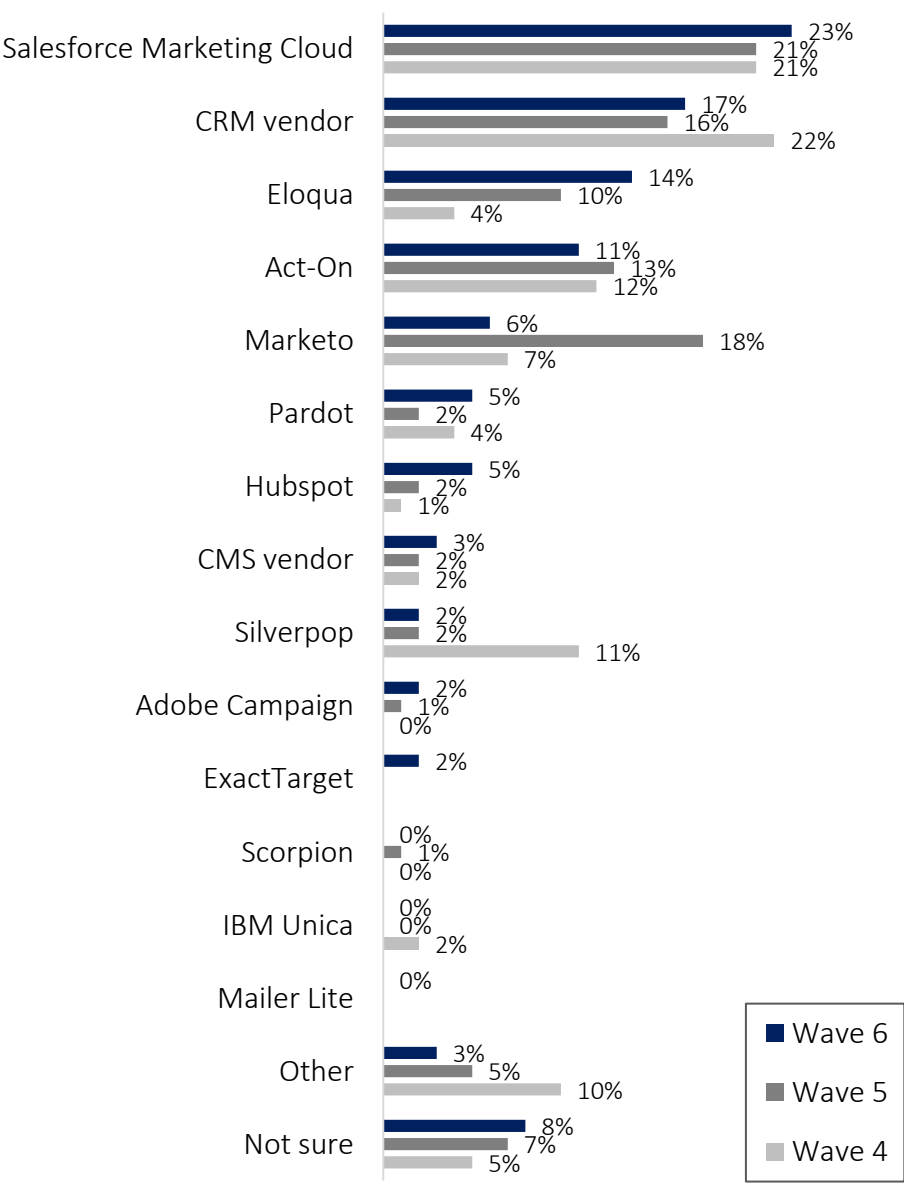


Salesforce shows big growth as a platform for PRM in Wave 6. Healthgrades also continues to show growth. Advisory Board/Crimson continues to decline.

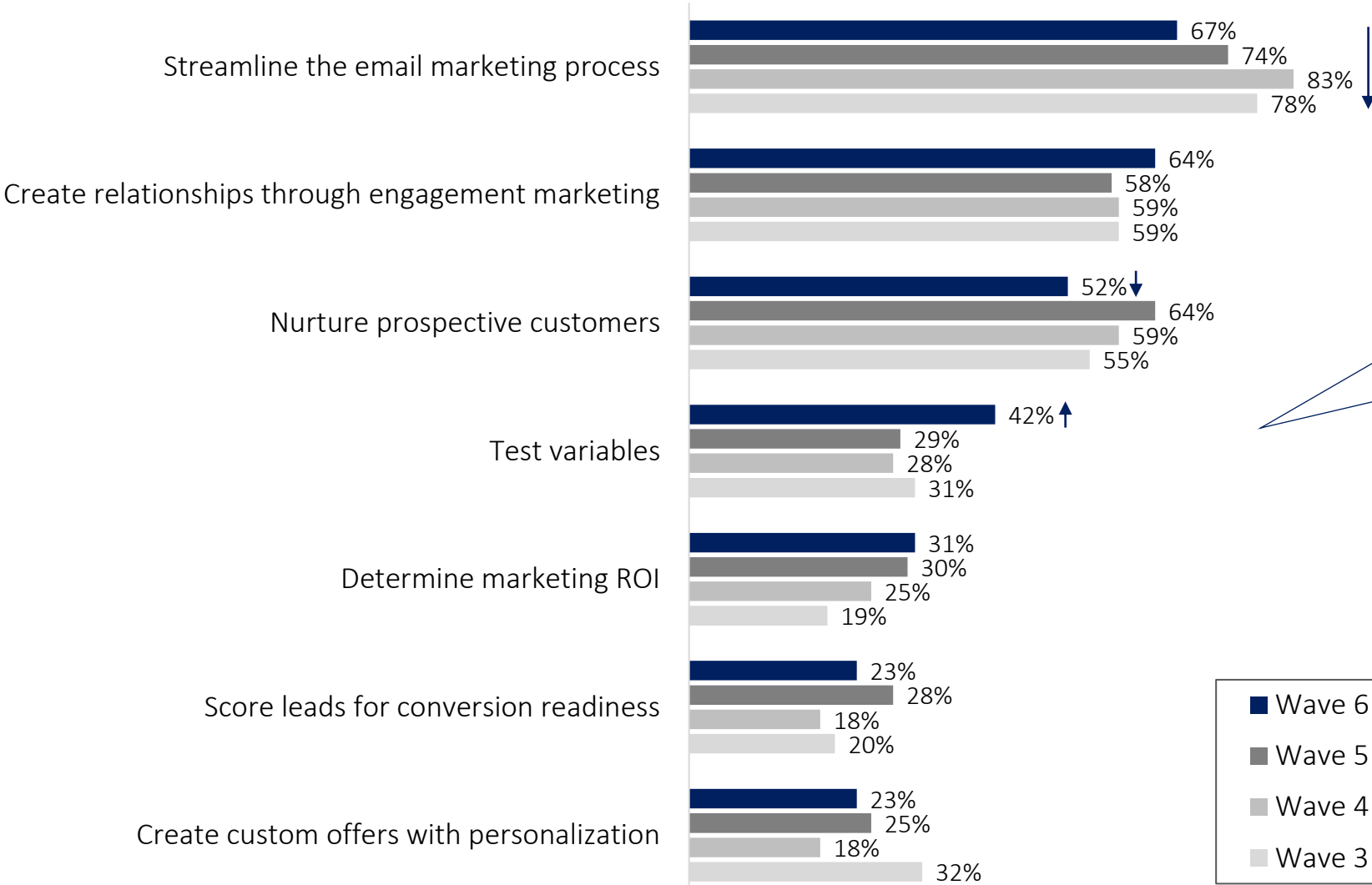
Use of a Marketing Automation Tool



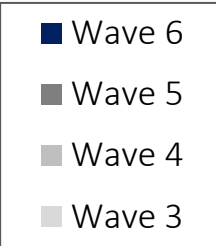
Marketing Automation Tool Used



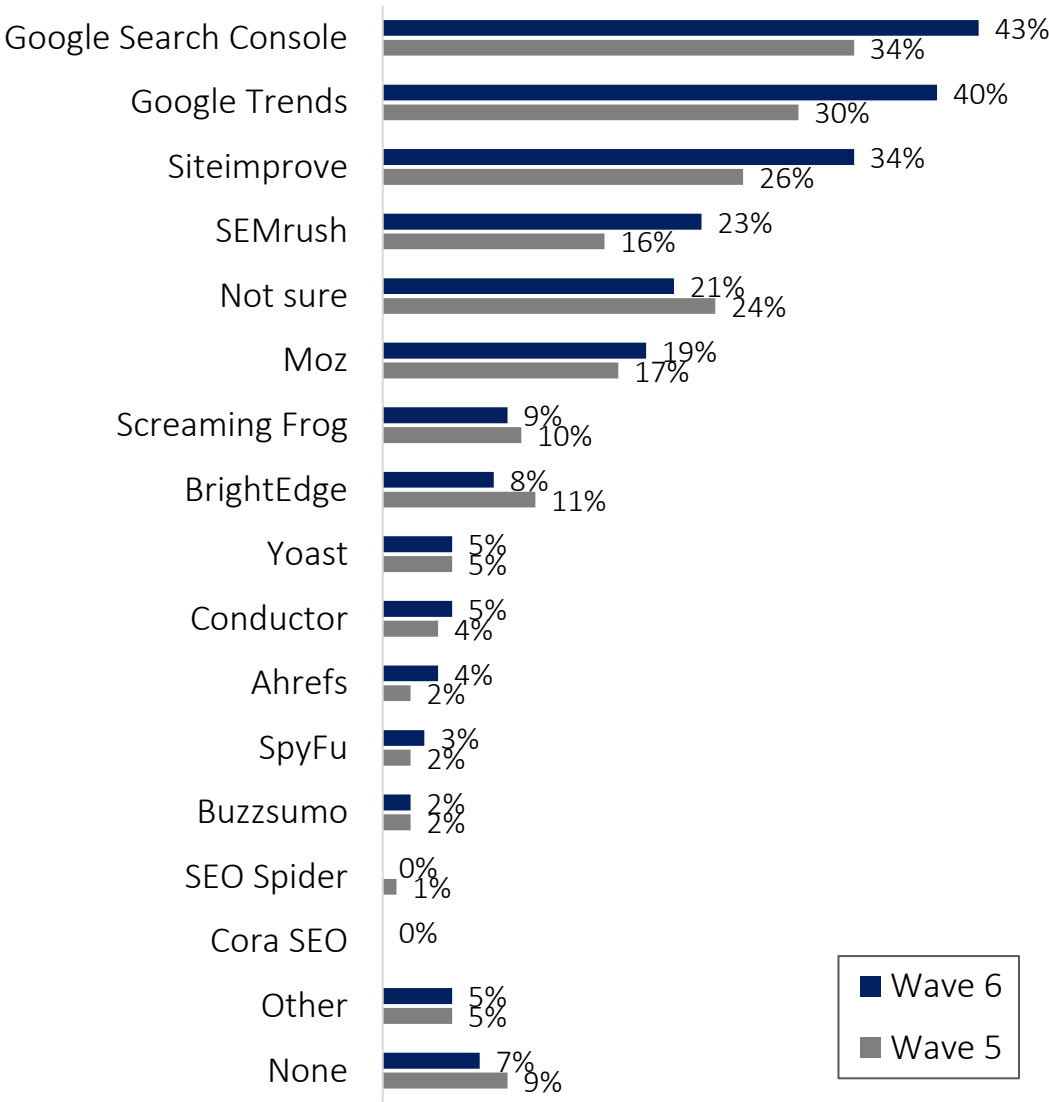
Marketing Automation Activities



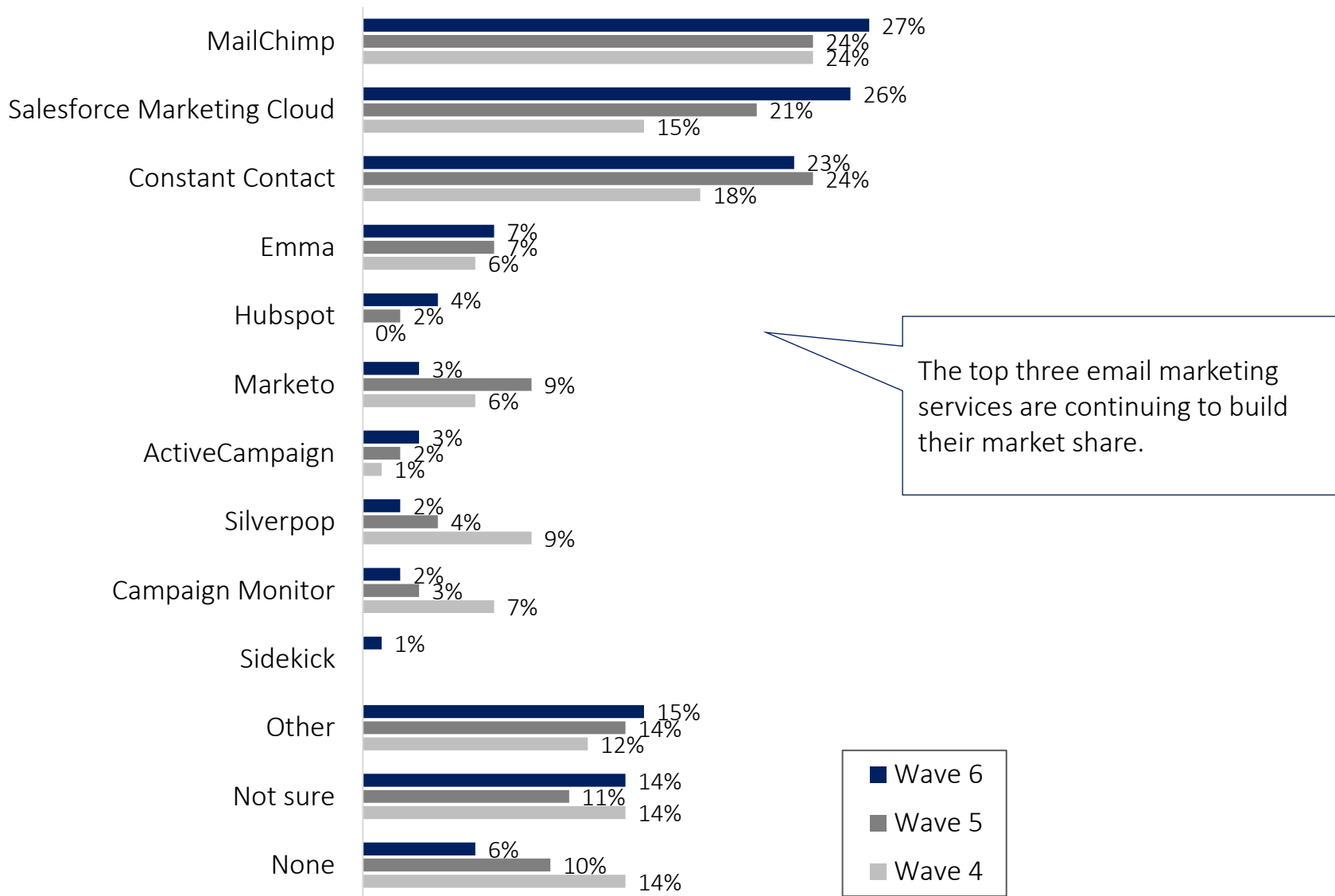
Marketing automation is being used more frequently to test variables and is losing ground in its uses of nurturing prospects and streamlining email.



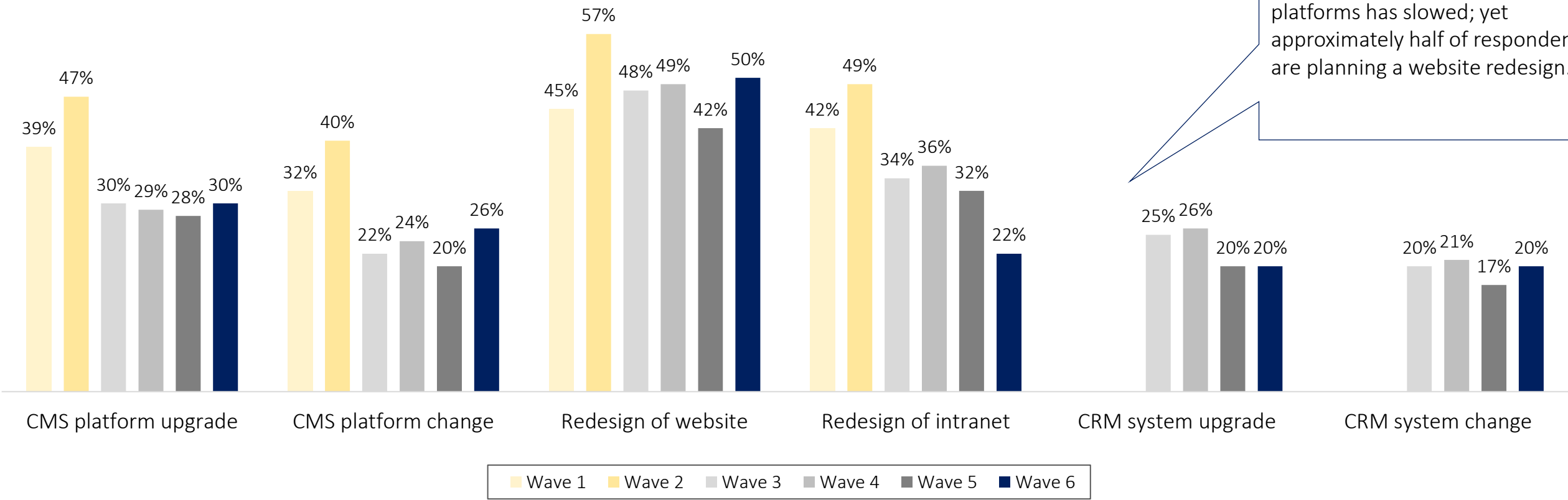
SEO Tools Currently Used



Email Marketing Service Currently Used



Planning Platform and Design Changes in the Coming Year?



## ROI and KPIs

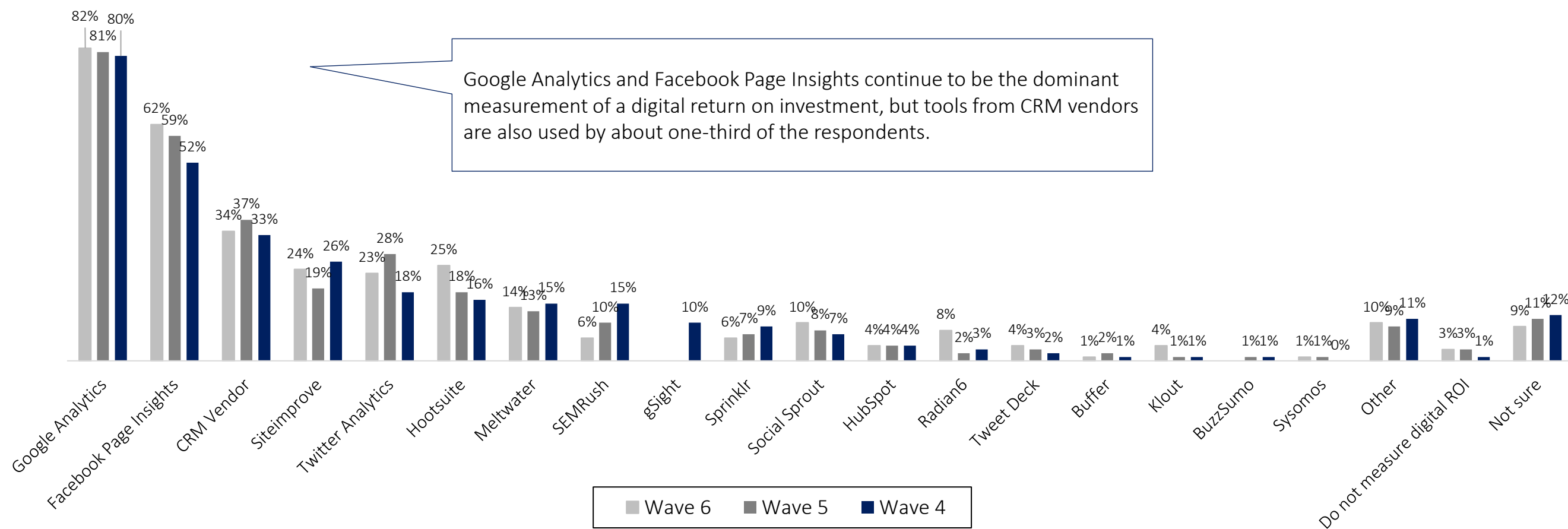
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*How Are Marketers Measuring Results?*

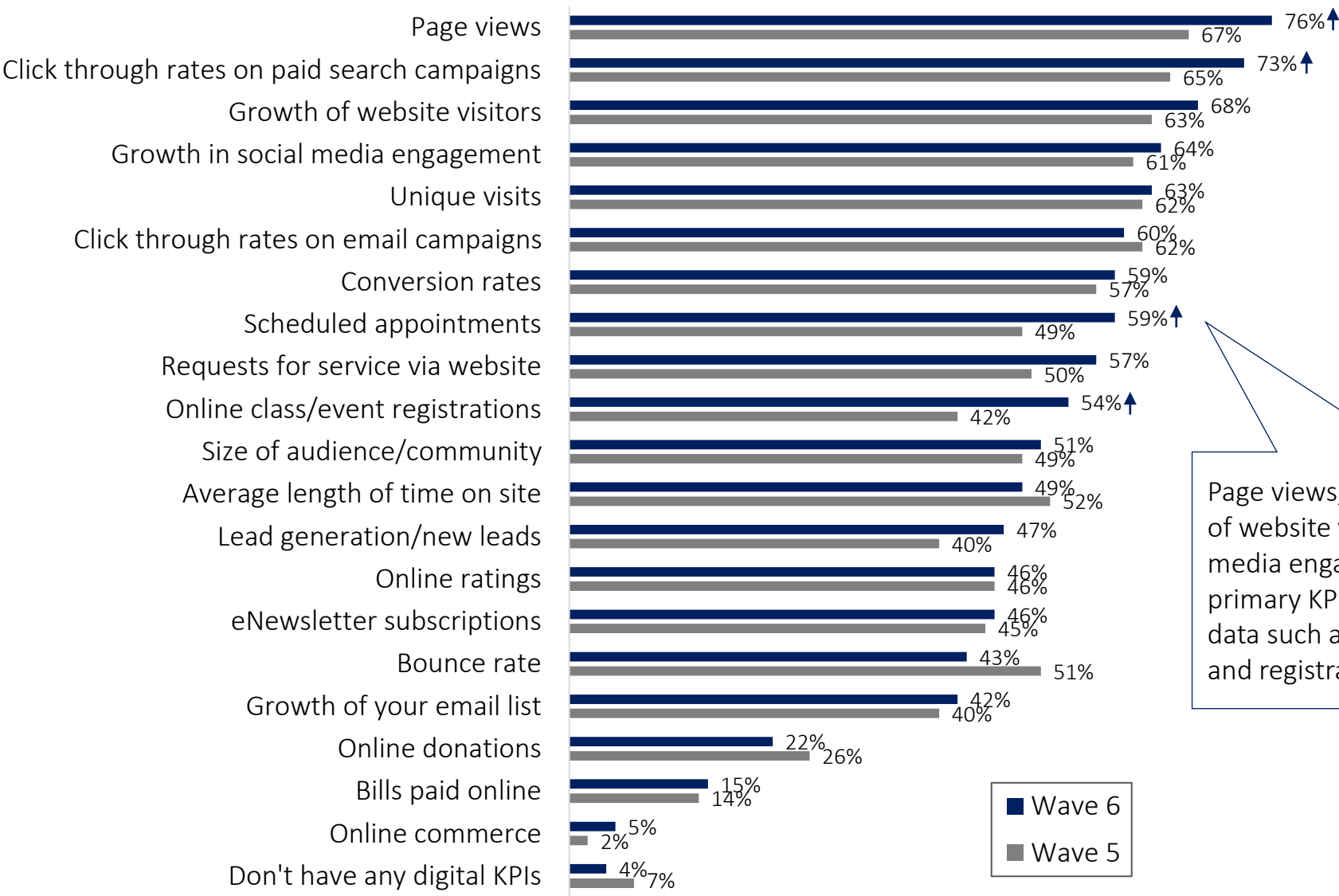




Tools Used to Measure Digital Return on Investment (ROI)



Digital Key Performance Indicators (KPIs)



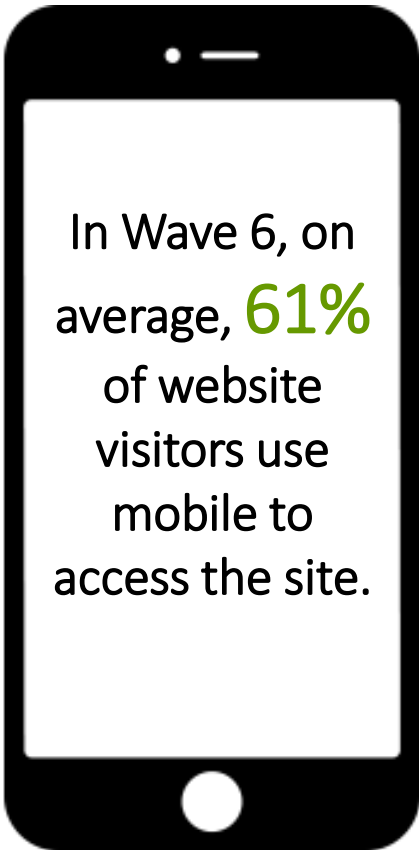
Page views, click through rates, growth of website visitors and growth in social media engagement continue to be the primary KPIs, but use of transactional data such as scheduled appointments and registrations is growing.

## Web Innovations

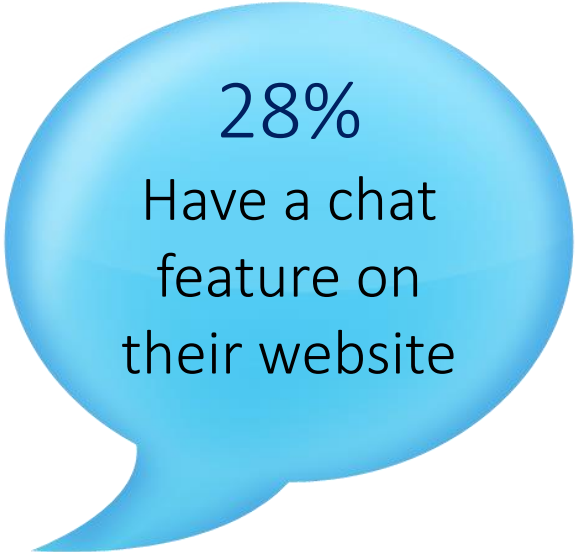
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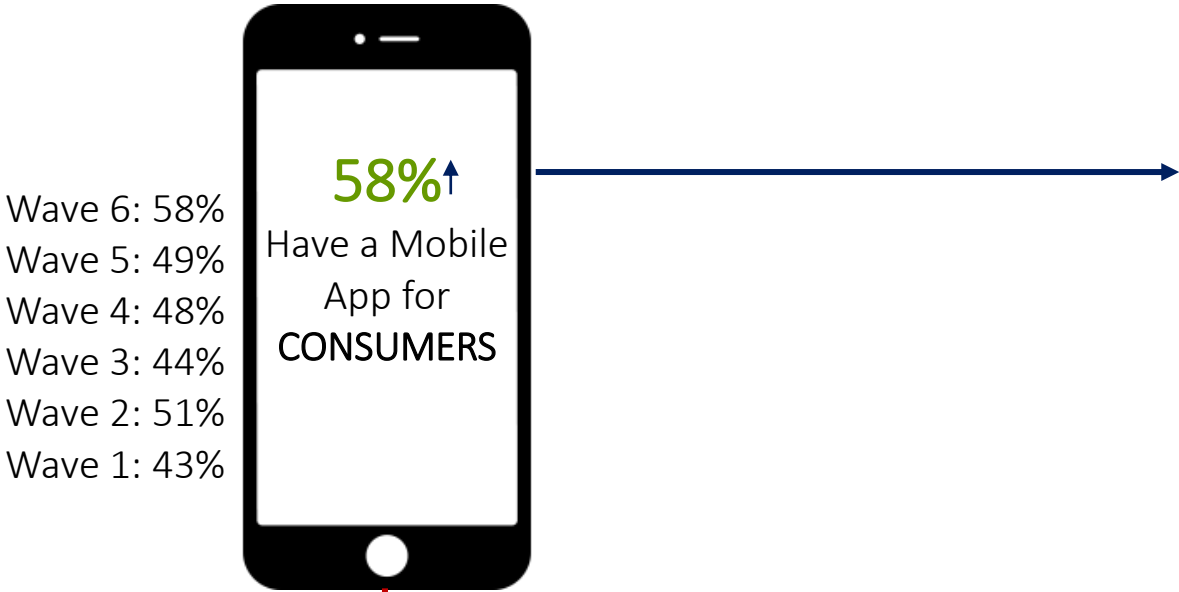
*What's New?*



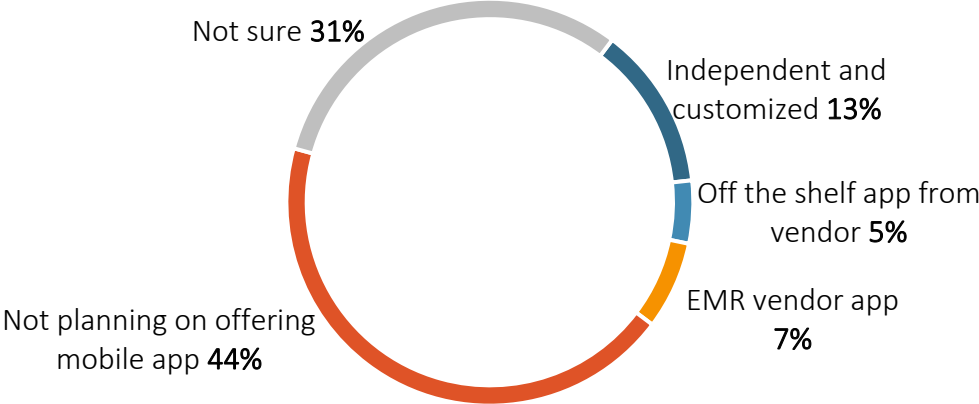


- Wave 6: 61%
- Wave 5: 60%
- Wave 4: 56%
- Wave 3: 47%
- Wave 2: 41%
- Wave 1: 39%

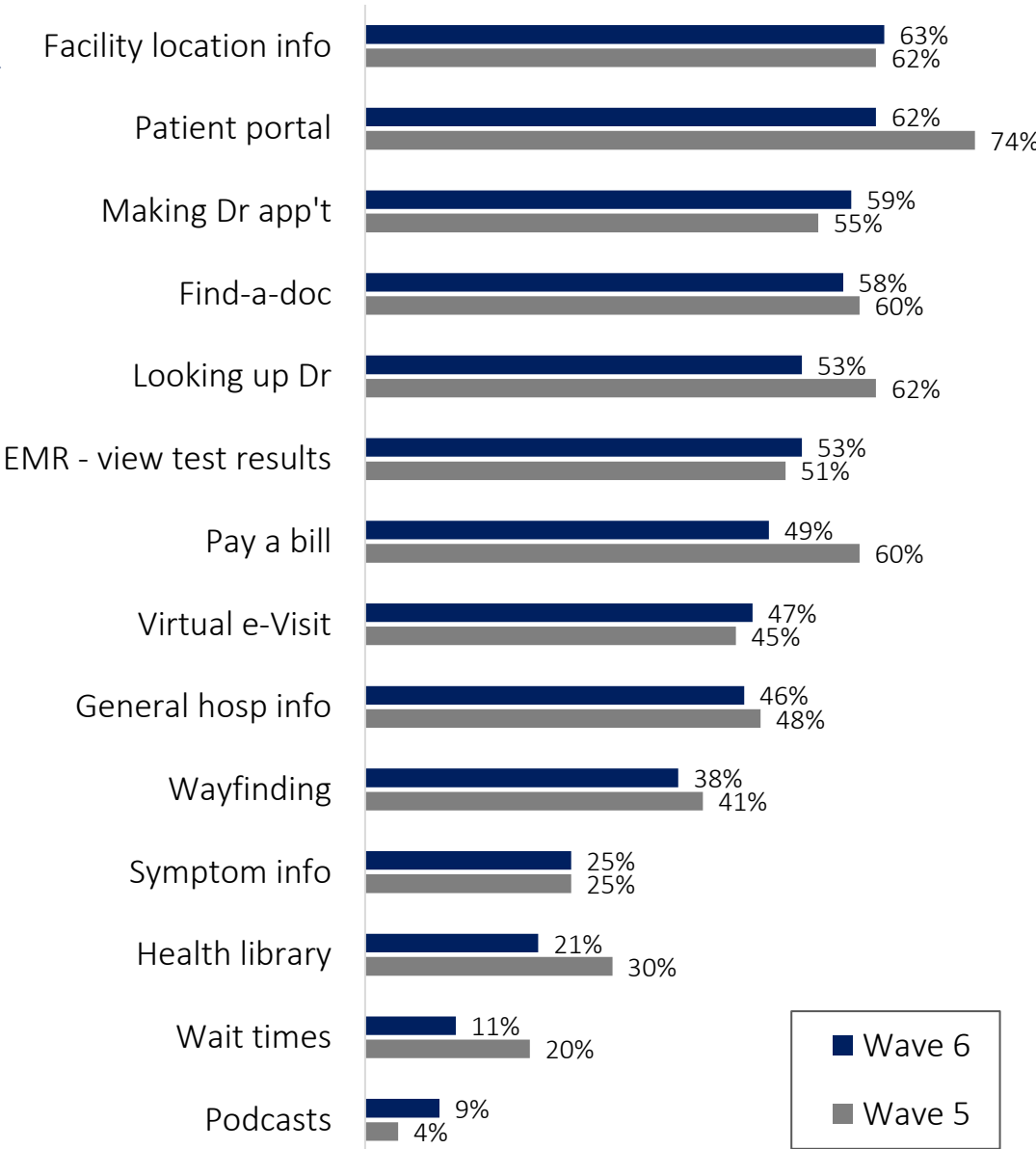




Type of Mobile App Considering  
(For those who don't currently have an app for consumers)

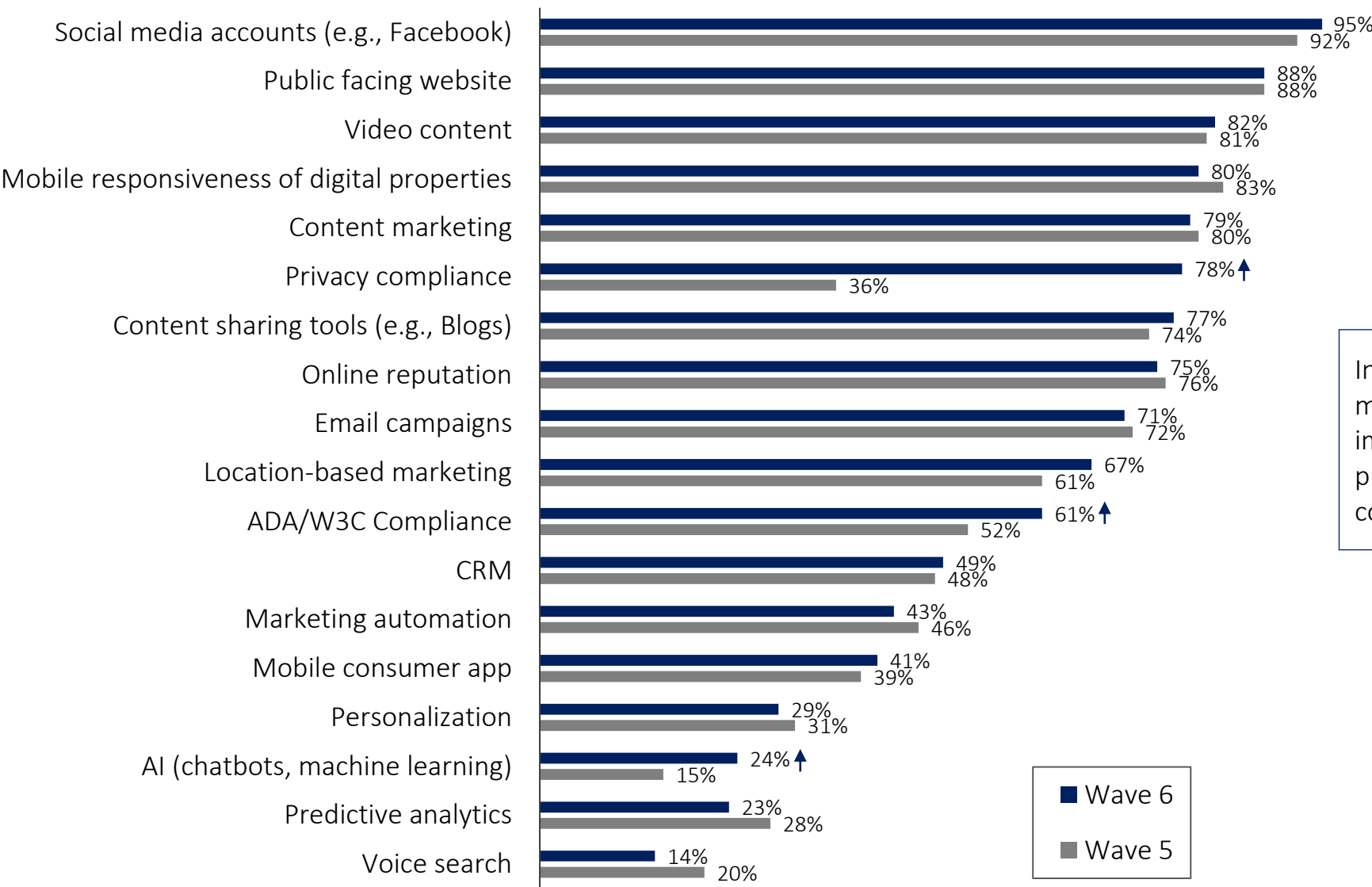


Main Purpose of Consumer Mobile App



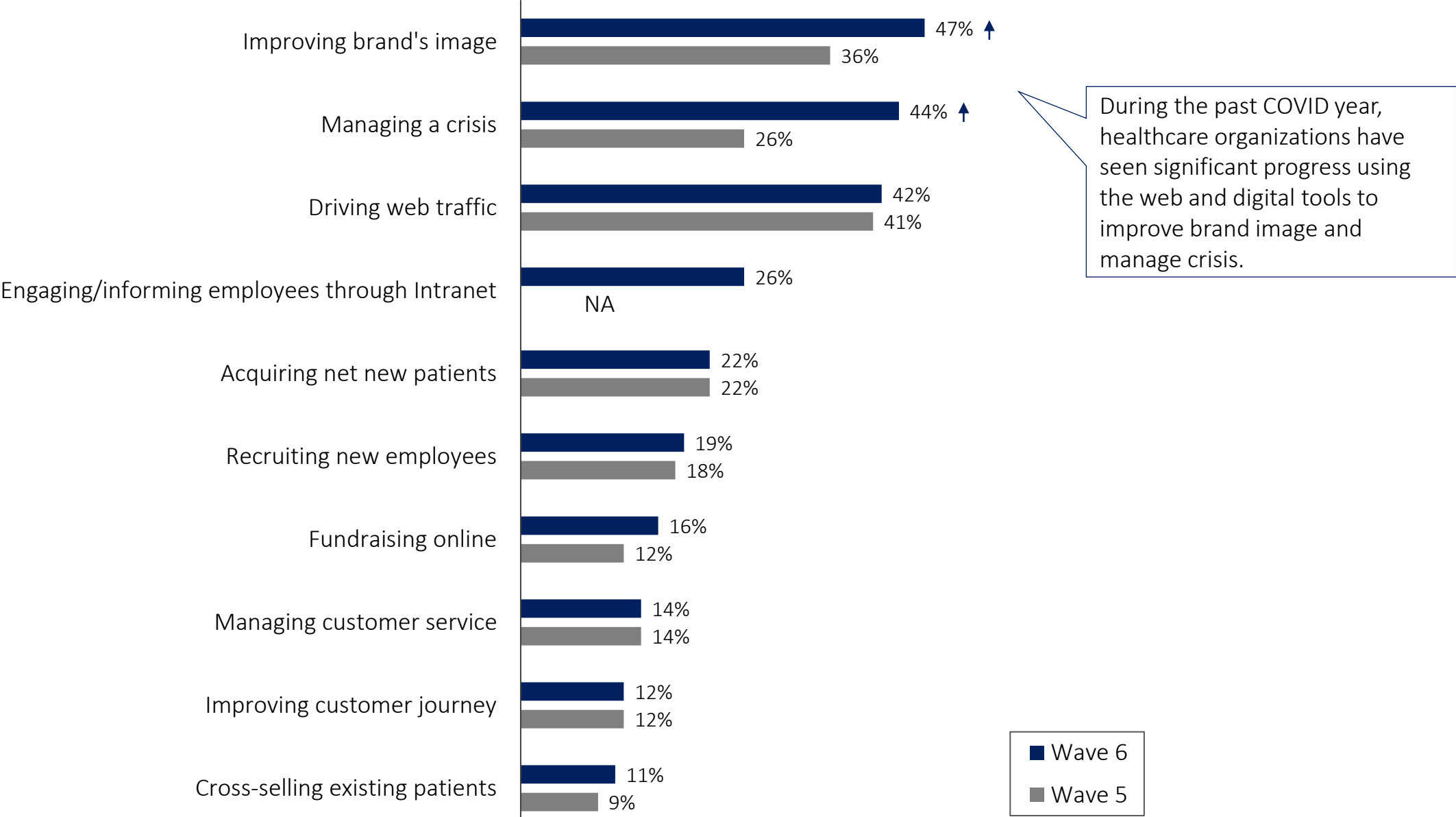
## Importance/Effectiveness of Digital Marketing Efforts

% of Marketers Who Feel their Organization is Very/Somewhat Effective at Meeting the Goals of these Activities



In the last year, healthcare has made significant progress in impacting the effectiveness of privacy and ADA/W3C compliance.

Using the Web and Digital Tools, The Organization has Been Very Effective at...





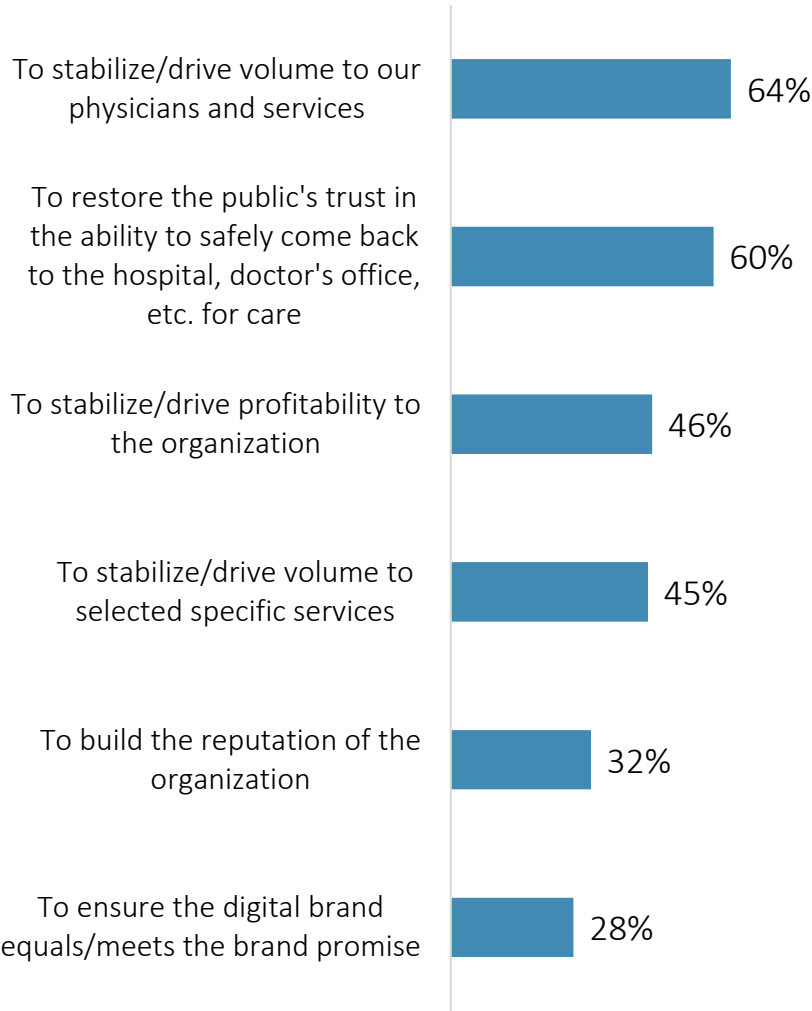
# Driving Digital Transformation of the Healthcare Brand

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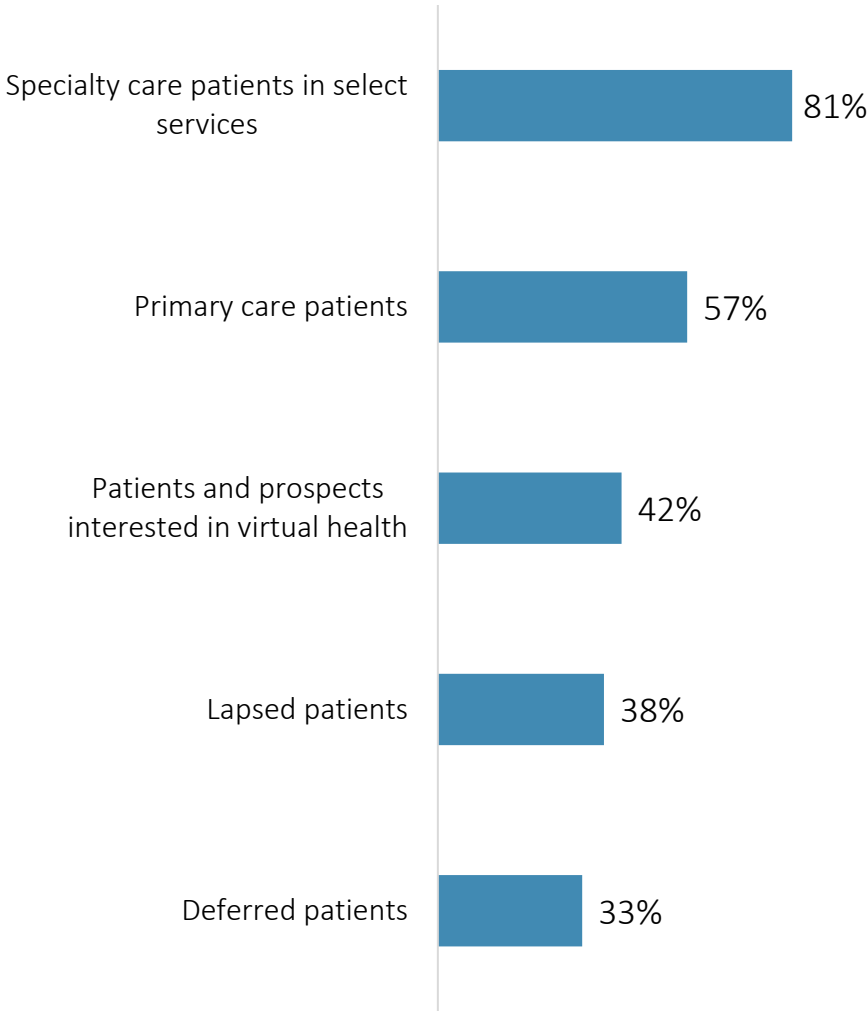
*The Role of Marketing*



Primary Marketing Goals  
(Next 6-9 months)

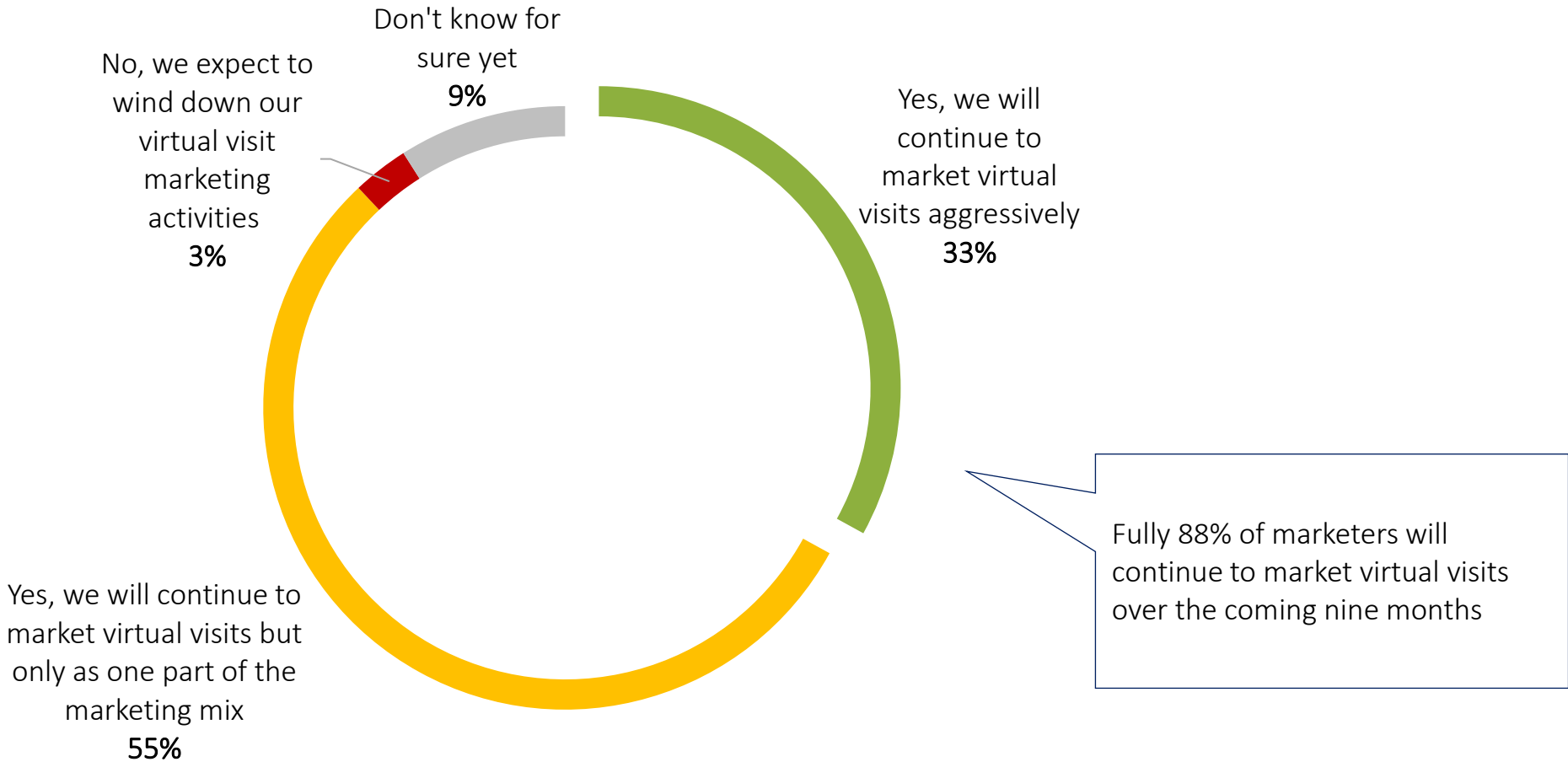


Primary Target Audiences  
(Next 6-9 months)



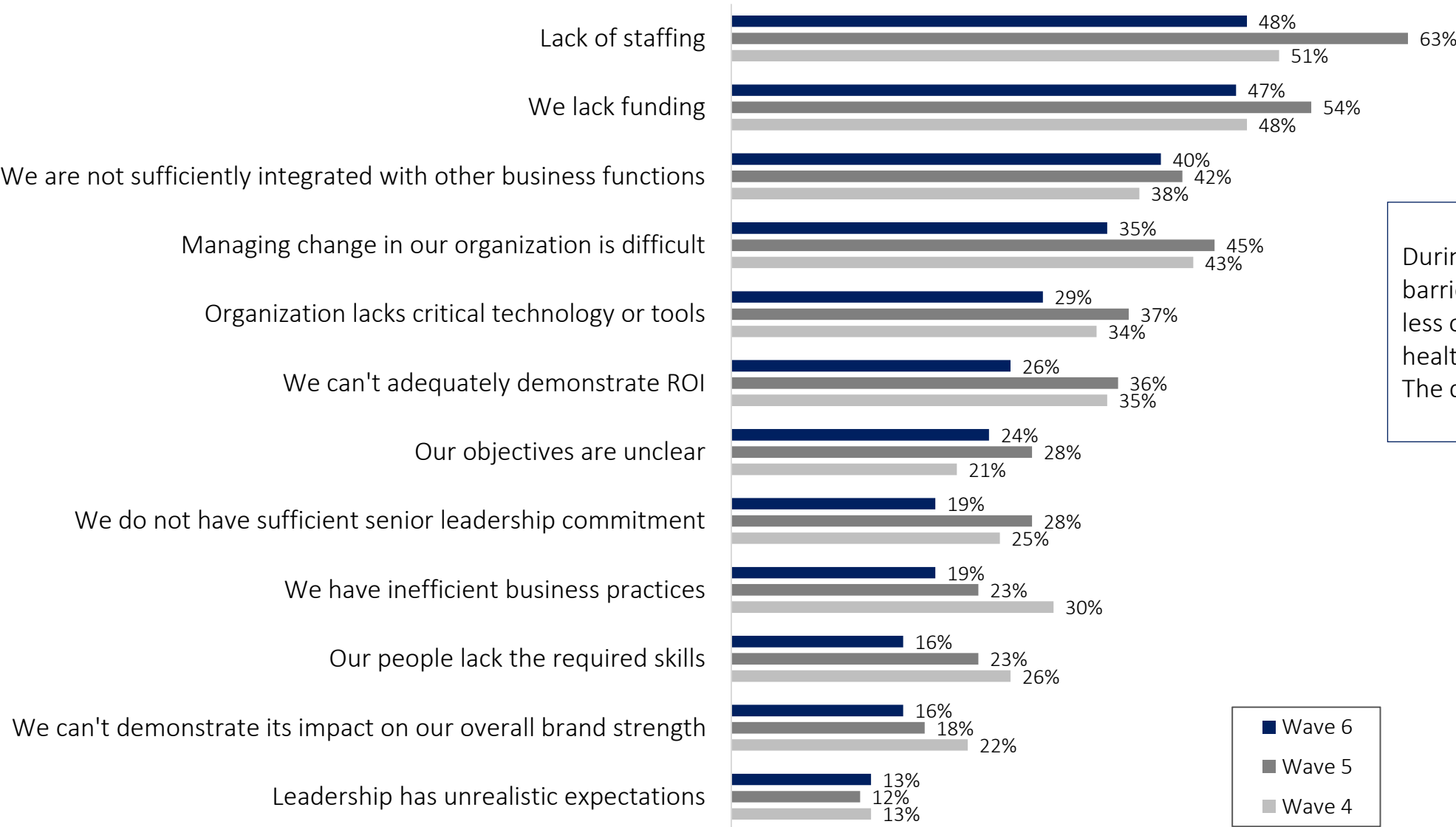
Note: New questions for Wave 6 survey.

### Virtual Visits as an Active Marketing Channel (Next 6-9 months)

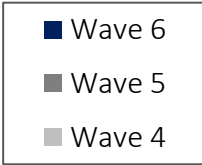


Note: New question for Wave 6 survey.

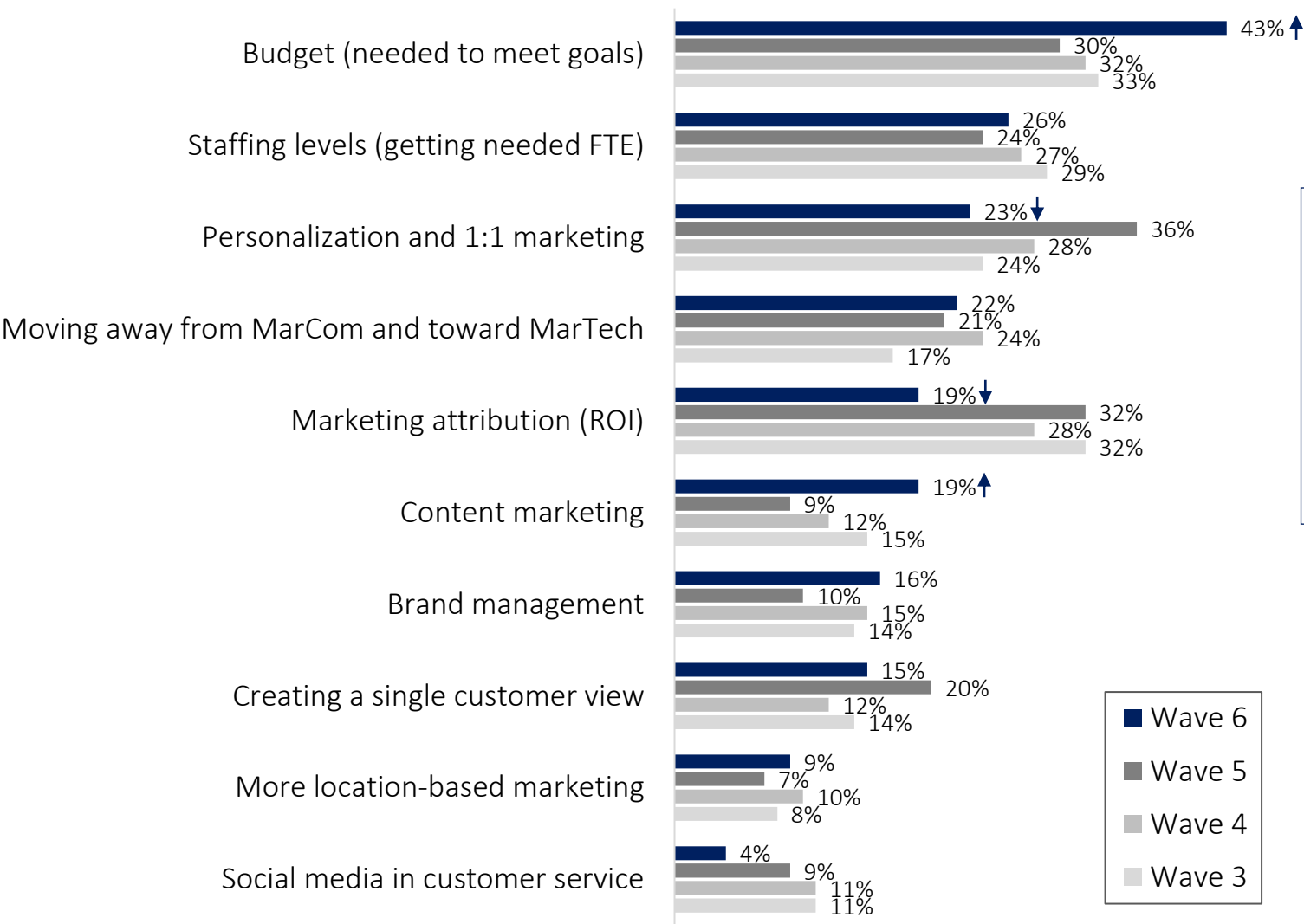
Challenges/Barriers Affecting Digital Marketing Efforts



During COVID, most barriers/challenges were less of an issue to healthcare marketers. The question is, will it last?



\*Top Two Pressing Issues in Healthcare Marketing



The top two pressing issues in healthcare marketing are currently budget and staffing. Concerns about personalization and ROI have declined while content marketing is a growing issue.

\*Note: For Wave 6, we added “In light of COVID” to the beginning of the question.

## Resources

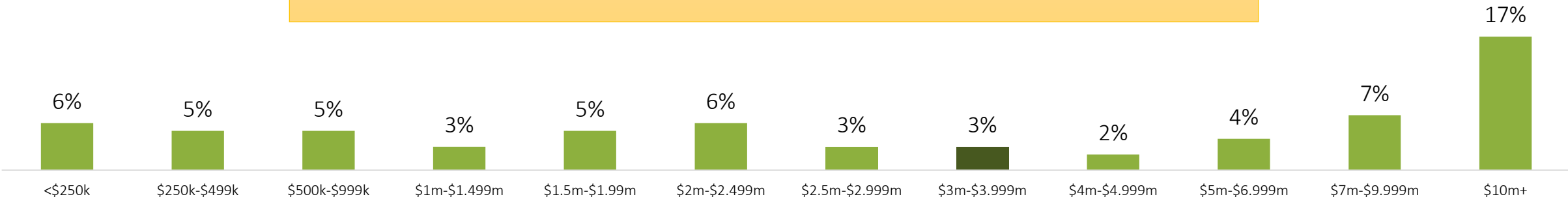
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*What Budget and People Are Available to Marketers*



### Total Marketing Budgets (Operations & Salary)

**Average percentage of total marketing budget dedicated to:**  
Website Design and Management: **19%** (Wave 5: 19%; Wave 4: 20%)  
Digital Marketing: **30%** (Wave 5: 31%; Wave 4: 29%)



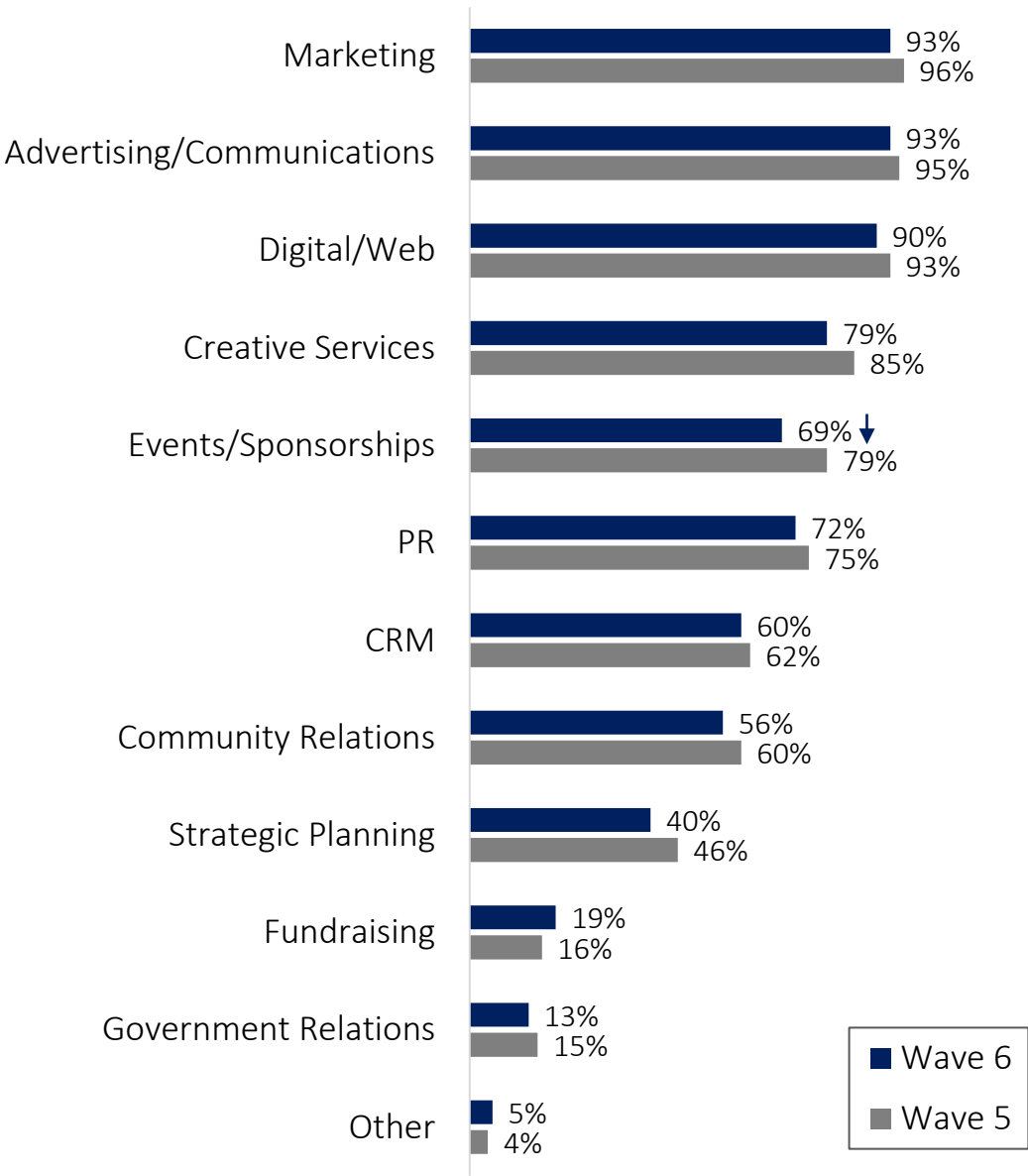
**Median Total Marketing Budget**  
**\$3.50m**  
(Wave 5: \$2.75m; Wave 4: \$2.5m)

Marketing, Website and Digital Budget by Organization Type

Organization Type	Estimated Median Marketing Budget	% of Marketing Budget Dedicated to Web Design & Management	Estimated Website Budget	% of Marketing Budget Dedicated to Digital Marketing	Estimated Digital Marketing Budget
AMC	\$8.5m	20%	\$1.7m	30%	\$2.55m
Health System	\$5m	17%	\$850k	30%	\$1.5m
Community Hospital	\$418k	19%	\$79k	34%	\$142k
Children’s Hospital	NA	21%	NA	28%	NA
Cancer Center	NA	21%	NA	28%	NA

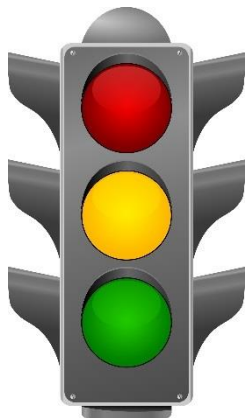


Activities Included in Marketing Budget



# Expectations about Next Year’s Marketing Budget

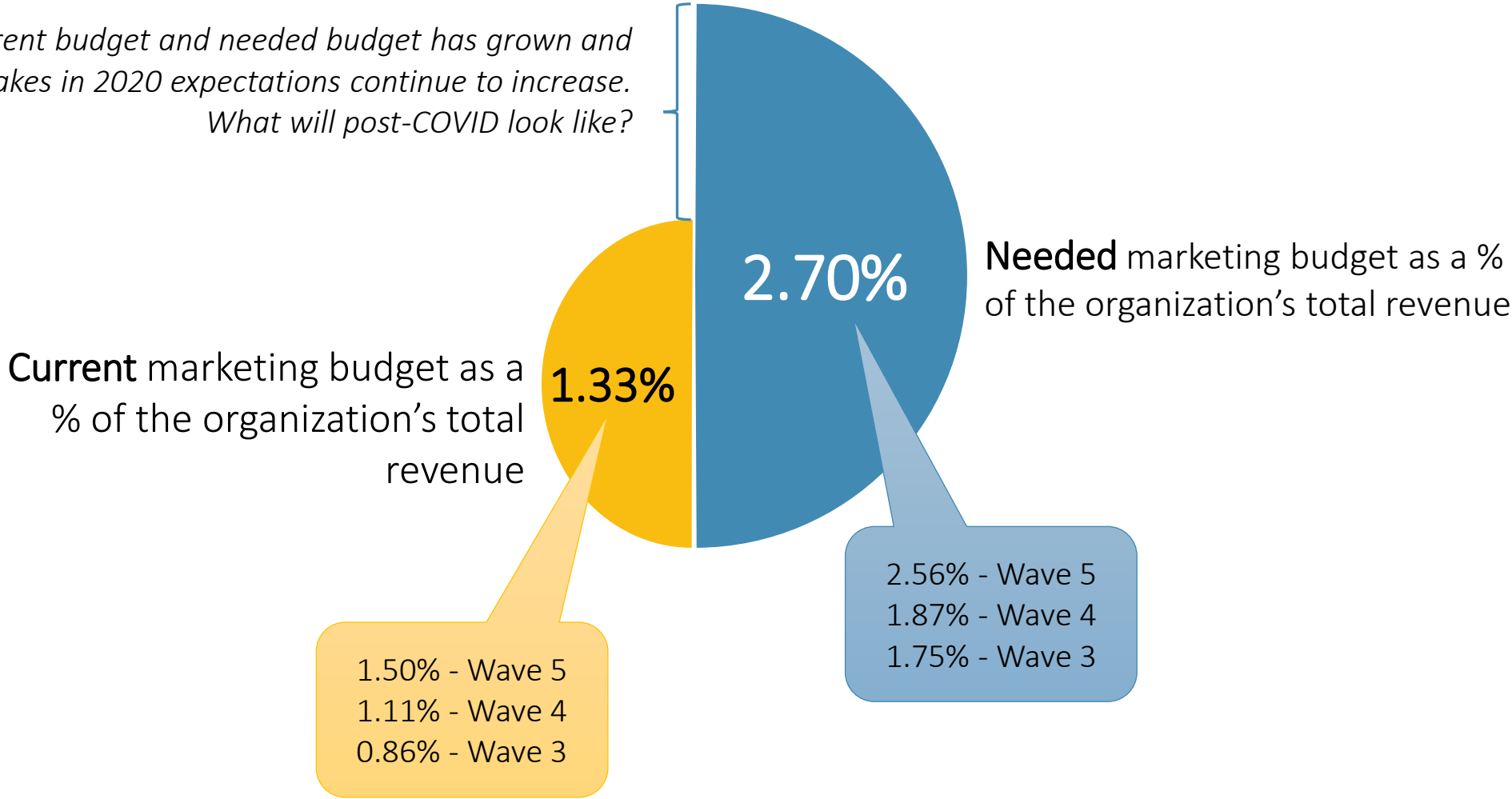
	Wave 6	Wave 5	Wave 4	Wave 3	Wave 2
Expect budget to be lower next year	15%	12%	14%	13%	11%
Expect budget to be unchanged next year	61%	58%	52%	53%	52%
Expect budget to be higher next year	14%↓	25%	26%	23%	29%

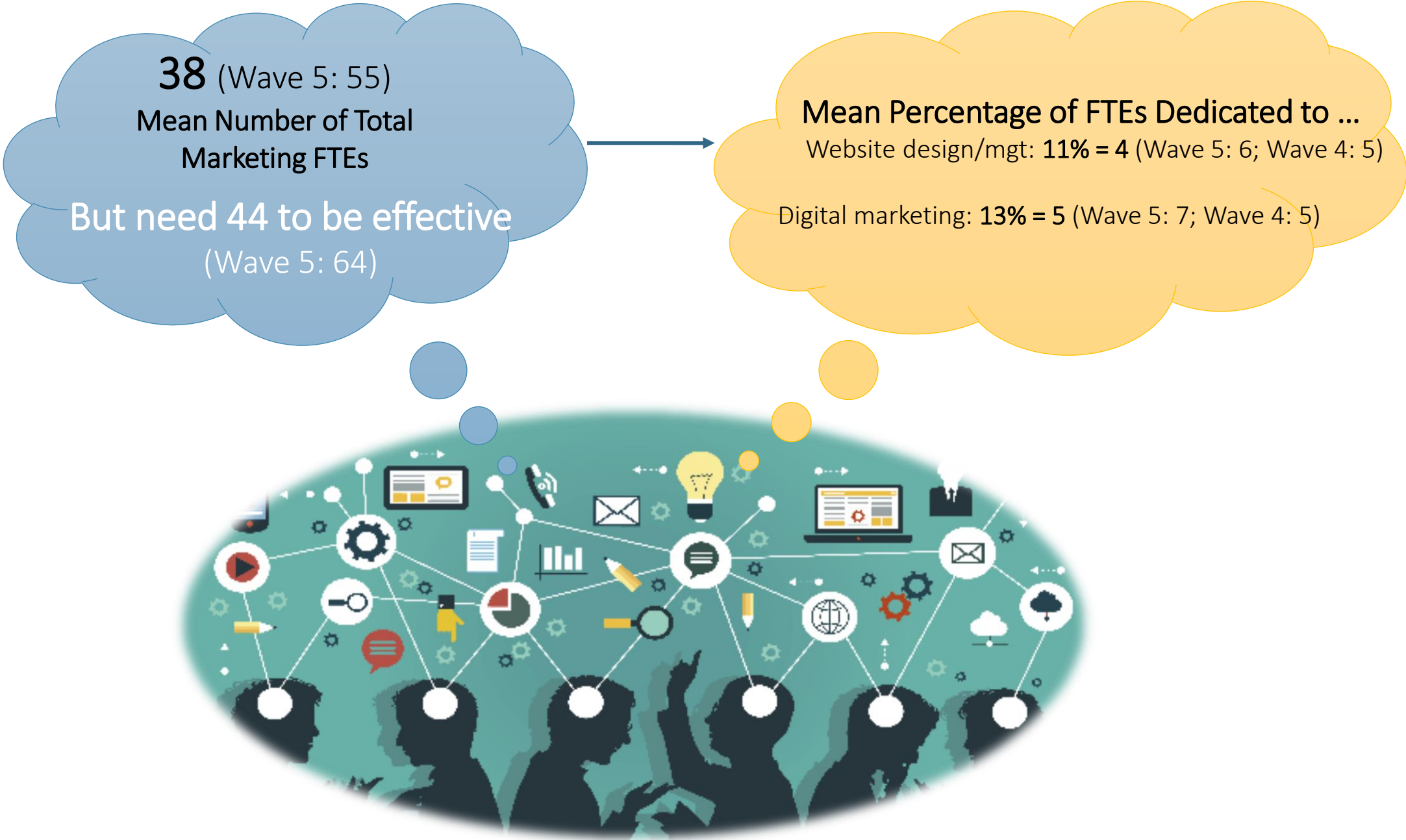


Optimism is not as strong for 2021 as we come out of the year with COVID. Clearly, side effects (of all kinds) will last beyond the pandemic itself.

# Marketing Budget as a % of Organization’s Total Revenue (Wave 6)

*The gap between current budget and needed budget has grown and while reality hit the brakes in 2020 expectations continue to increase. What will post-COVID look like?*



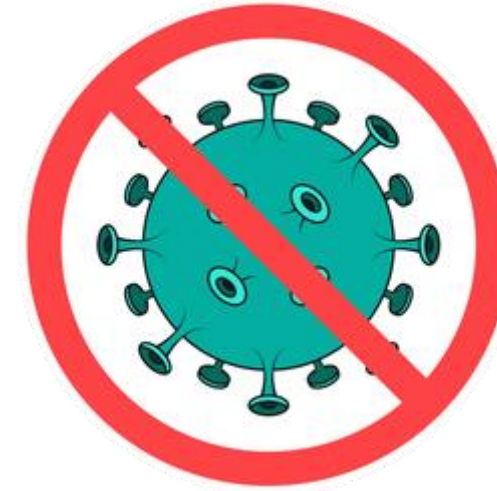


Marketing, Website and Digital FTEs by Organization Type

Organization Type	Average Marketing Department FTEs	Calculated Website Design & Management FTEs	Calculated Digital Marketing FTEs
AMC	44	5	7
Health System	51	4	4
Community Hospital	8	1	1
Children’s Hospital	29	3	3
Cancer Center	24	13	13

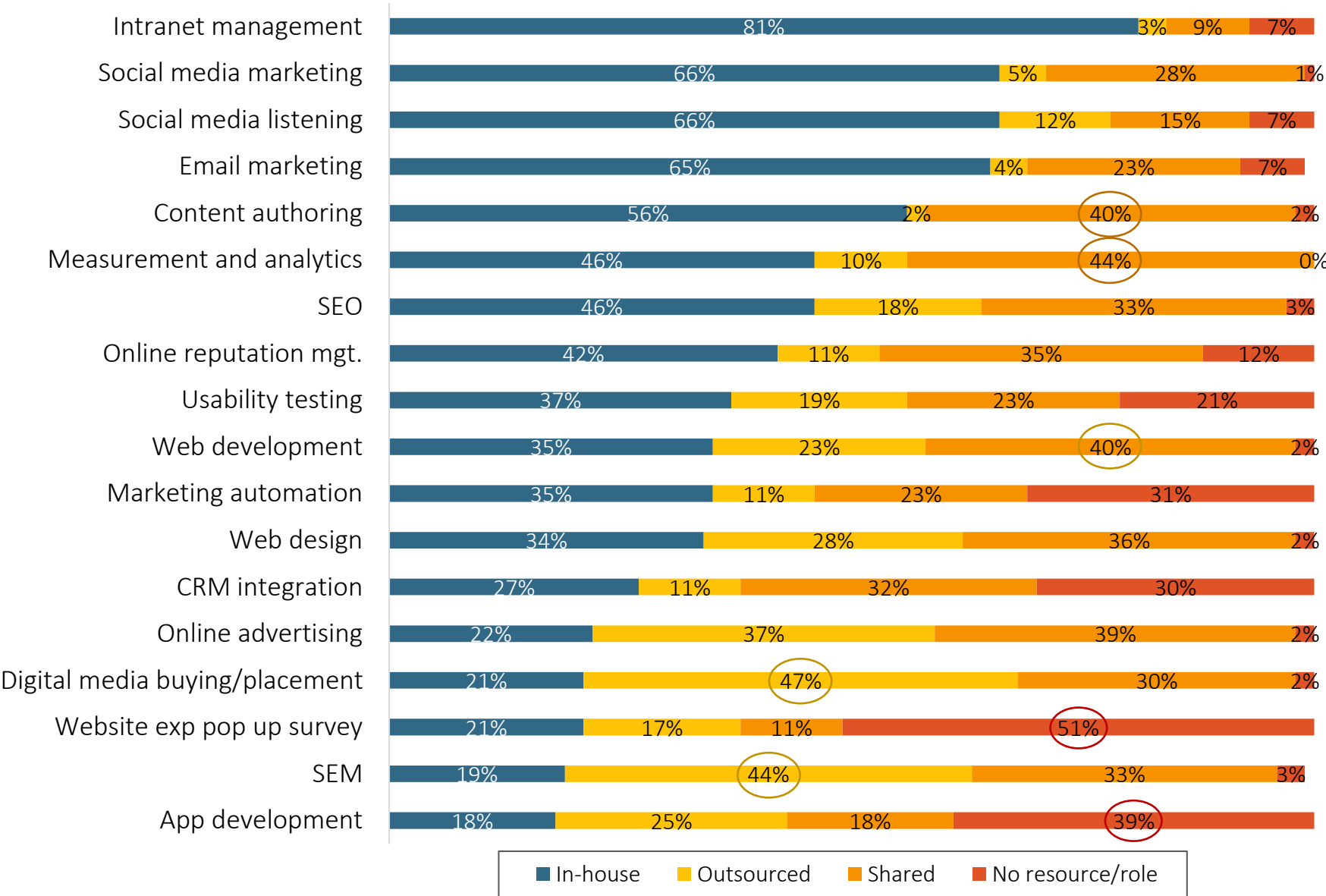


**22%** of total media buy is paid search



**56%** of marketing efforts are committed to non-COVID services

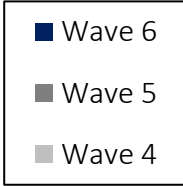
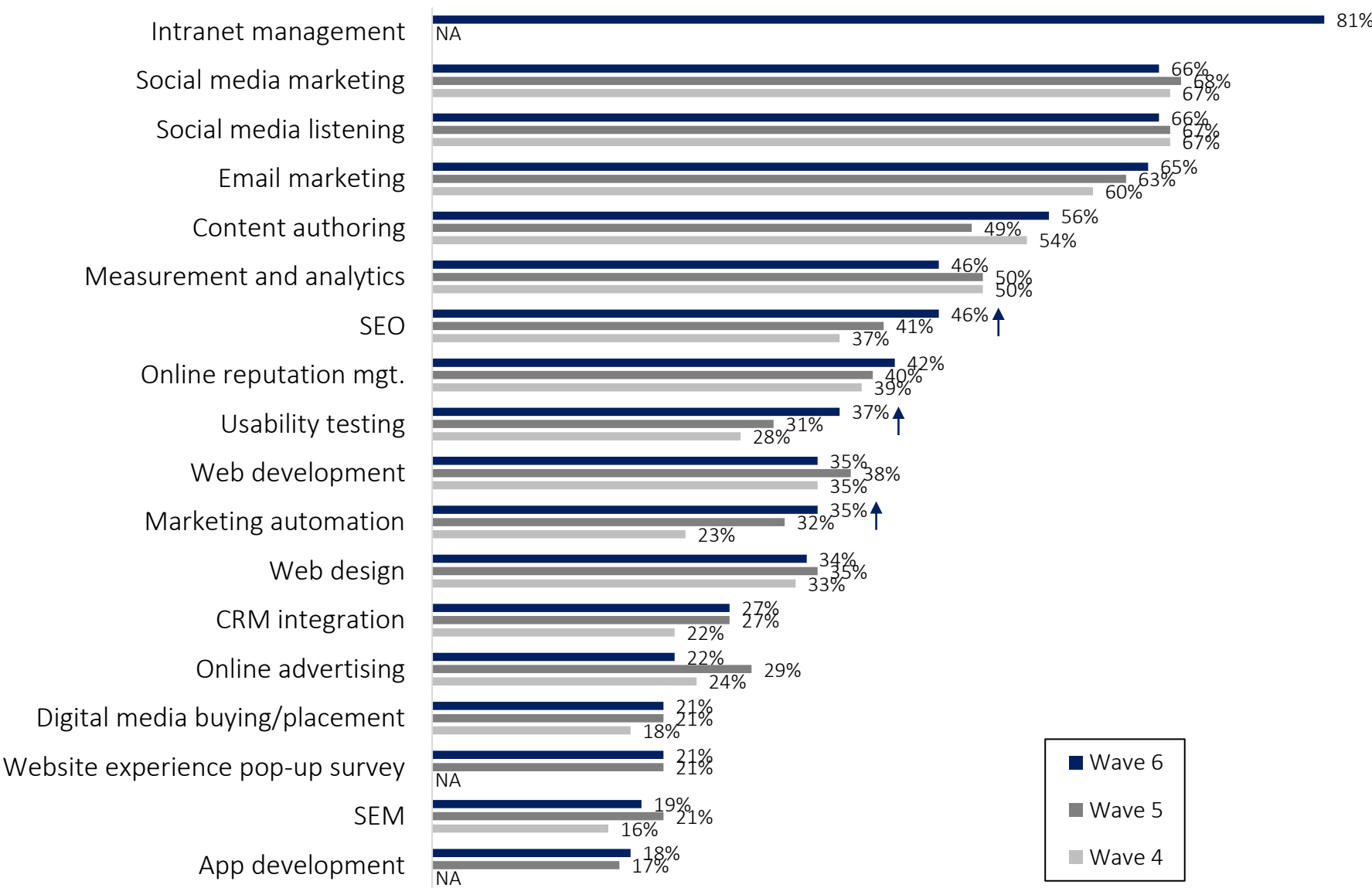
Web and Interactive Marketing Roles Performed



Healthcare marketers lack resources for app development and website experience surveying and are largely outsourcing digital media buying and SEM.

Note: Circled data points represent a major difference from others in the category.

Web and Interactive Marketing Roles Performed In-house





# Impact of COVID on Marketing Staff and Visibility

No one in marketing laid off: 65%  
1-10% of staff laid off: 18%  
11%+ laid off: 14%



### Staffing Expectations after COVID

I expect our department to have the same staffing as before: 49%

I expect our department to be smaller: 12%

I expect our department will grow: 23%

Not sure yet: 16%

### Marketing’s Current Credibility in Light of COVID

We have gained newfound credibility	47%
We have maintained an already strong credibility	43%
We have lost previously held credibility	3%
We didn’t have prior, nor did we gain credibility	4%
Not sure	3%

40% are confident that their newfound credibility will **definitely last** with senior leadership

Note: New questions for Wave 6 survey.

## Survey Sponsors

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*Learn More About the Survey Sponsors*

Be On The Lookout:

Survey Invitation for Wave 7 of the Annual  
Survey Drops in October 2021



## About Greystone.Net

Now in its 25<sup>th</sup> year, Greystone.Net provides:

- **Professional services** including web/digital strategy consulting, vendor selection assistance, call center/access consulting and more
- **Professional development options** including the well-known and highly-regarded annual Healthcare Internet Conference (HCIC) and the Backstage Pass webinar series
- **Solutions and products**, including gSight<sup>SM</sup>, our voice of the customer research product, and Greystone Engage, a benchmarking tool, both designed to help marketers benefit from the rapidly-evolving trends and technologies in the healthcare MarTech space, and Greystone Connect to help vendors connect with marketing professionals in healthcare.

Greystone.Net has worked with hundreds of hospitals and health systems as they strive to develop, implement and integrate interactive marketing strategies. We add valued strategic thinking to digital healthcare. And we continue to develop new strategies and products to enable healthcare organizations to establish and grow their brand in an environment where consumers expect 24/7 access, information and service. Learn more at [www.greystone.net](http://www.greystone.net).



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The objective of any brand that strives to be strong is to “acquire and retain customers more efficiently and profitably than competitors over the long-term.” These two elements of a single strategy are brought to life through an effectively communicated brand promise (i.e., patient acquisition) and the effective internal operationalization of the brand promise by creating a strong brand experience (i.e., patient retention). All of Klein & Partners’ quantitative and qualitative research and consulting services are geared toward improving your brand’s overall health; whether it is in providing information that helps your brand increase its share of new patients or increase its retention of existing patients or even improve current patients’ level of interaction (i.e., share of experience) with the brand ... because it’s all brand research.

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