

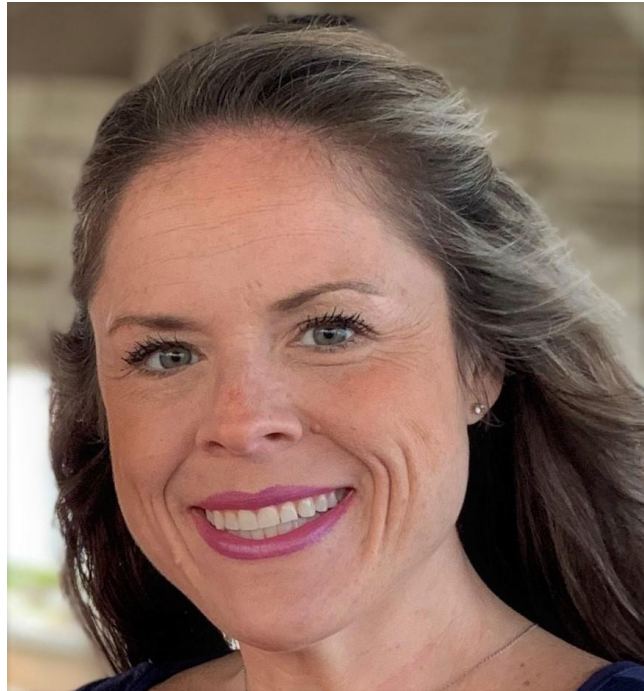


# *The Healthcare Technology Marketing Survey: June 2021 Pulse*

*August 2021*



## Lauren Goodman, Director Market Intelligence



- 15 year market research industry veteran
- Insights Professional Certification Master from the Insights Association
- Former System Director Market Research for CHRISTUS Health
- Over 5 years experience as a trusted market research partner for top management consulting firms

*Adam Turinas, CEO and Founder*



- “Healthtech Sales & Marketing Guy”
- Healthlaunchpad, specialist marketing consulting firm for healthtech companies
- Founded, grew and sold Uniphy Health, highly regarded clinical communications company
- 20+ years in marketing (Ogilvy, Organic, Bank of America, Dell, IBM, Sirius Radio)

## Why We Are Doing This

- For the past decade the promise of connected care design and delivery has been the driving force for healthcare IT marketers.
- For marketers 2020 was massively disruptive
  - Access to prospects became much harder
  - In-person events canceled
  - Shift to virtual
- 2021 presented a host of unknown variables and questions
  - How will marketers adapt, evolve and build a sustainable model for the new normal?
  - What strategies and tactics should be considered?
  - What is best practice and what can be learned by studying other B2B marketers?
    - As we are now over 6 months into 2021, we wanted to check in and see how it's going so far

# *The HIMSS Media and Healthlaunchpad Partnership*



**health**launchpad

*Providing insights and translating intelligence into education to  
help Healthcare Technology Marketers*

# *Today's Agenda*



# What We Will Overview

*HIMSS Market Intelligence and healthlaunchpad continue to work to provide insights and translate intelligence into education for healthcare marketers and their teams.*

*The results of our pulse we will cover:*

- What tactics have been used thus far in 2021, and their effectiveness
- Anticipated 2021 budget vs. current budget
- Anticipated 2021 investments vs. current investments
- Current top challenges faced

# *Research Overview*

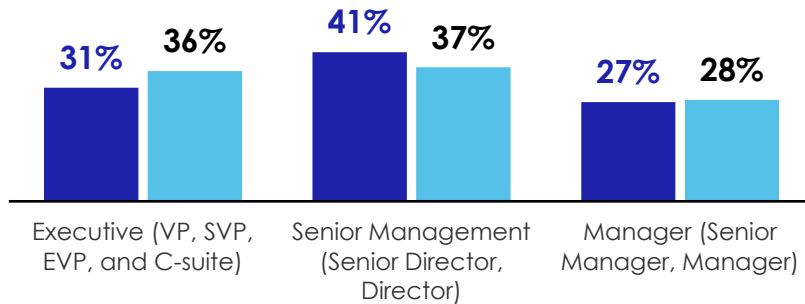


- This research was conducted among individuals working in marketing, strategy, or sales positions at healthcare or healthcare technology organizations.
- A total of 51 qualified respondents answered the survey in Q4 2020, and 64 qualified respondents answered in June 2021. To qualify, respondents had to have a management role at an organization working in a healthcare or healthcare technology organization, and have decision-making or influence over marketing decisions.
- This was a blind data collection effort, healthlaunchpad was not identified as a sponsor of the research.

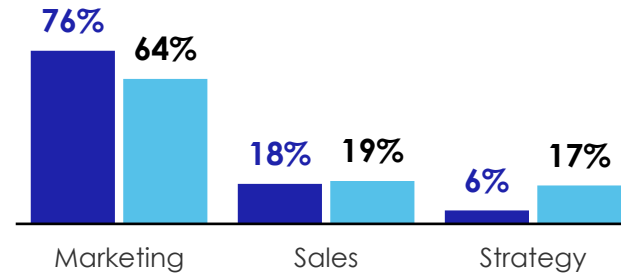
# Respondent Profile

2020 June 2021

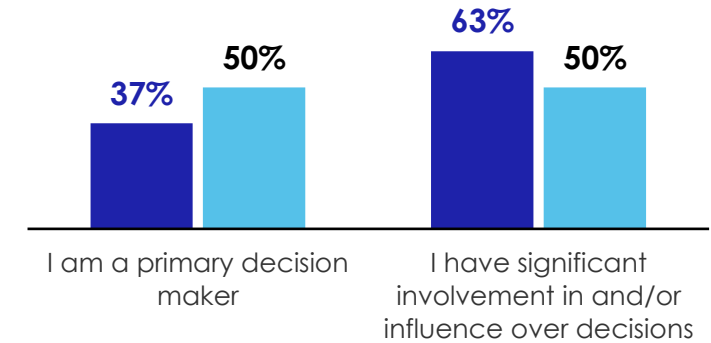
## Job Level



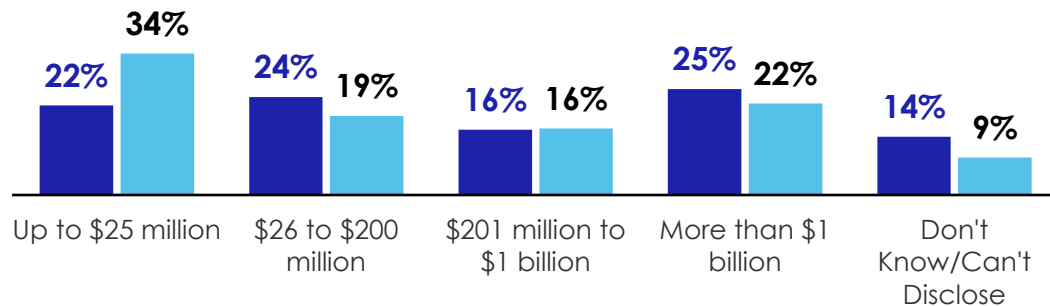
## Functional Role



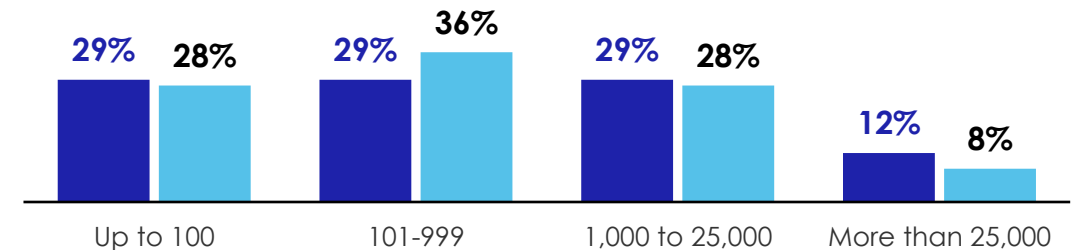
## Marketing Strategy Role



## Organization's Annual Net Revenue



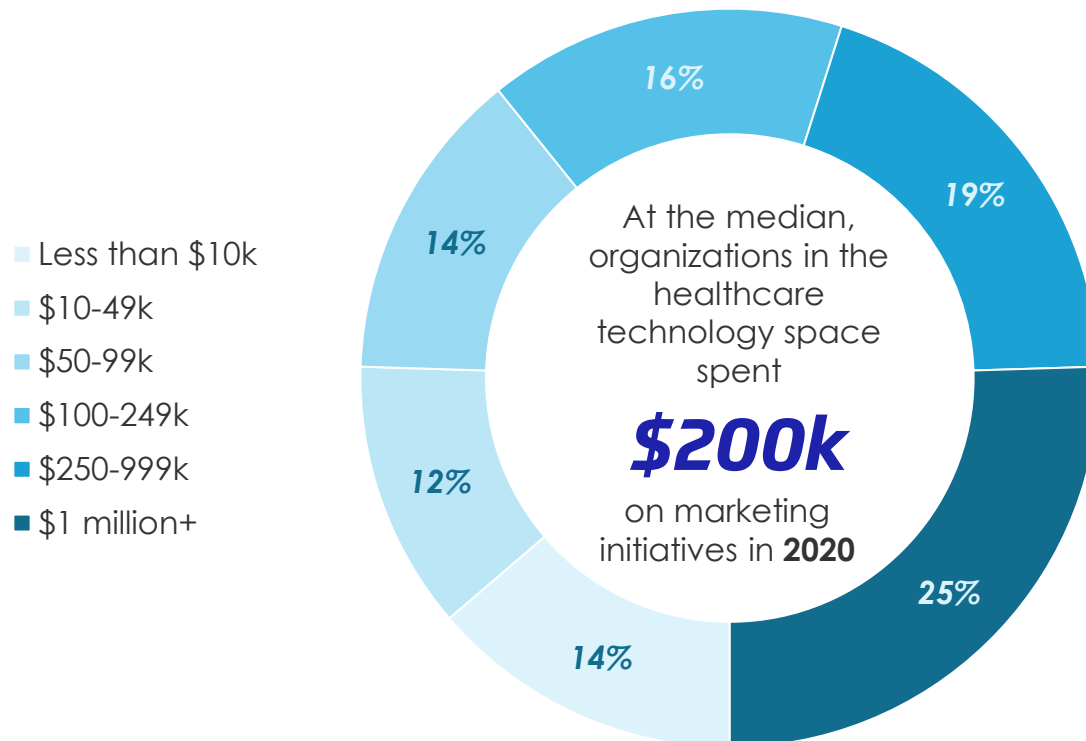
## Organization's Number of Employees



# *Detailed Findings*

# More than half of healthcare technology marketers expected an increase in budget in 2021

For 2020, please tell us the estimated range of your marketing spend.



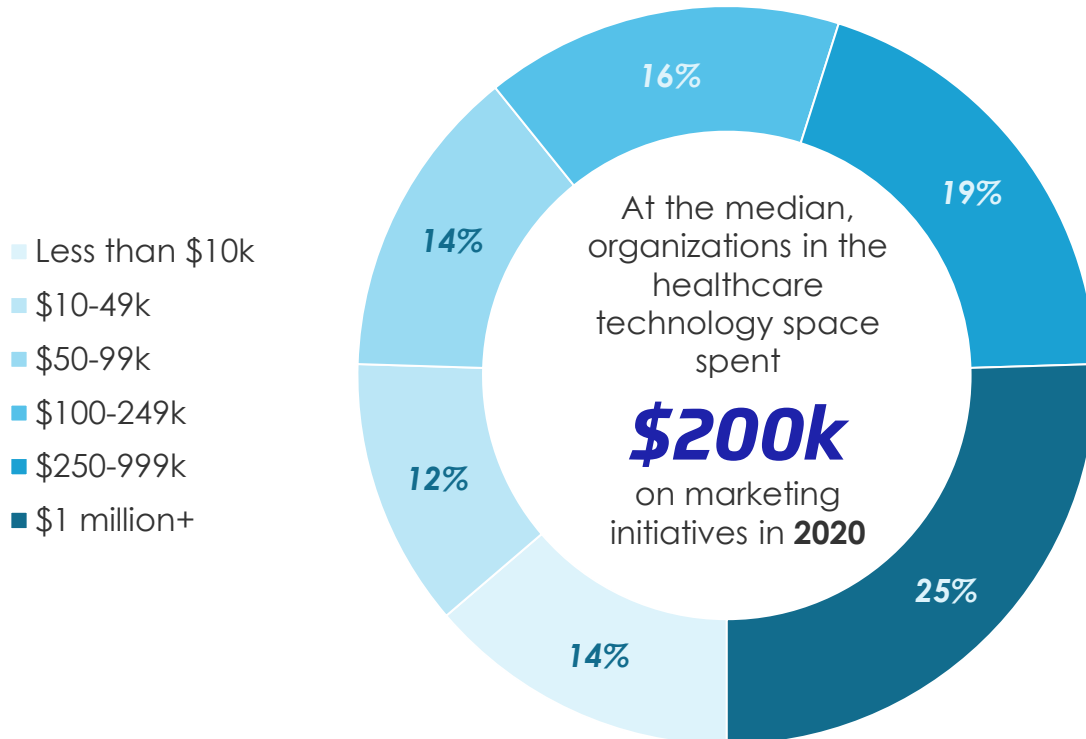
**55%** expected their **2021 spending** to be an **INCREASE** from their 2020 spending levels

On average, spending was **expected to increase by 30%** at these organizations

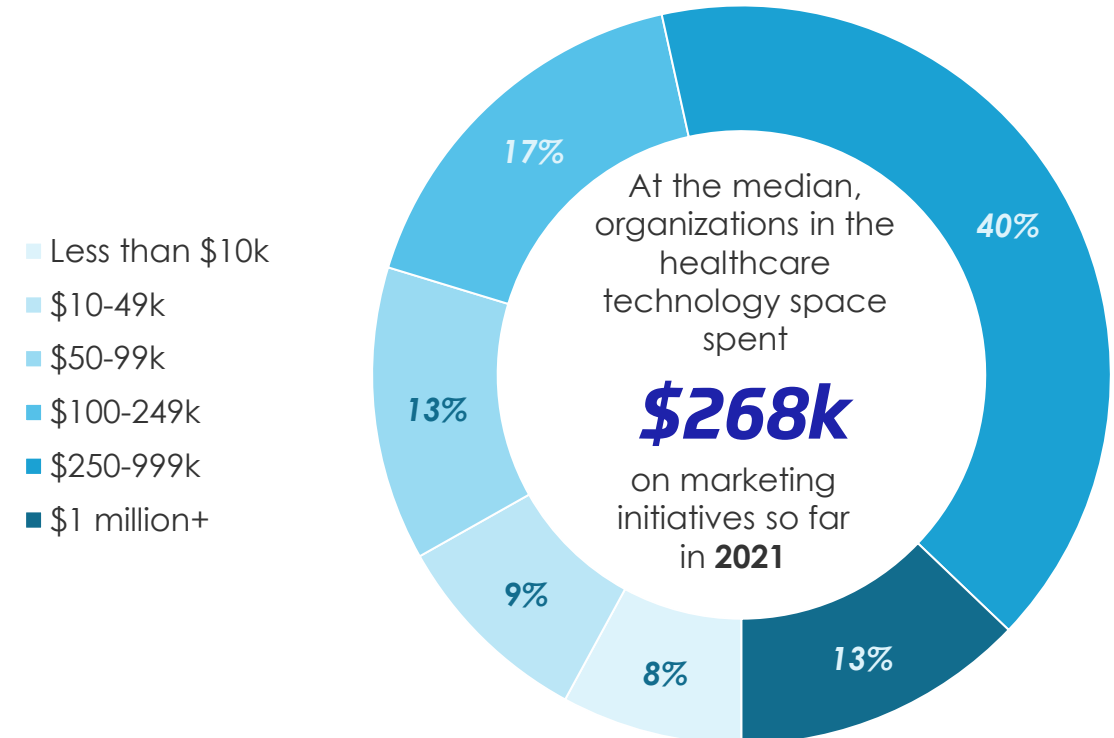
# As expected, higher spend on marketing efforts has been seen

For 2021, please tell us the estimate range of what you have spent on marketing efforts so far.

## 2020 Spend

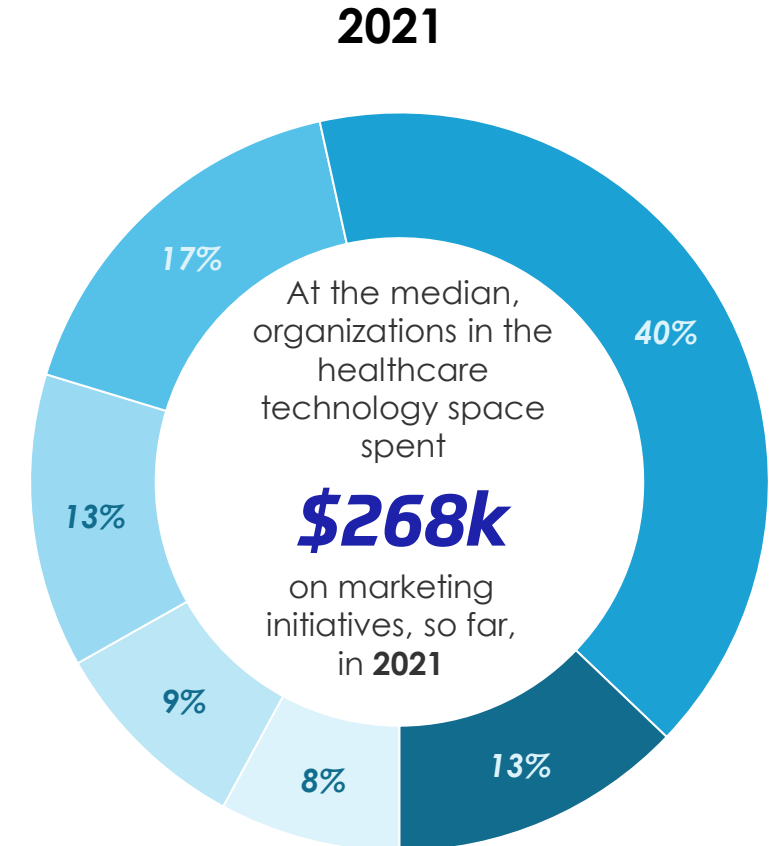
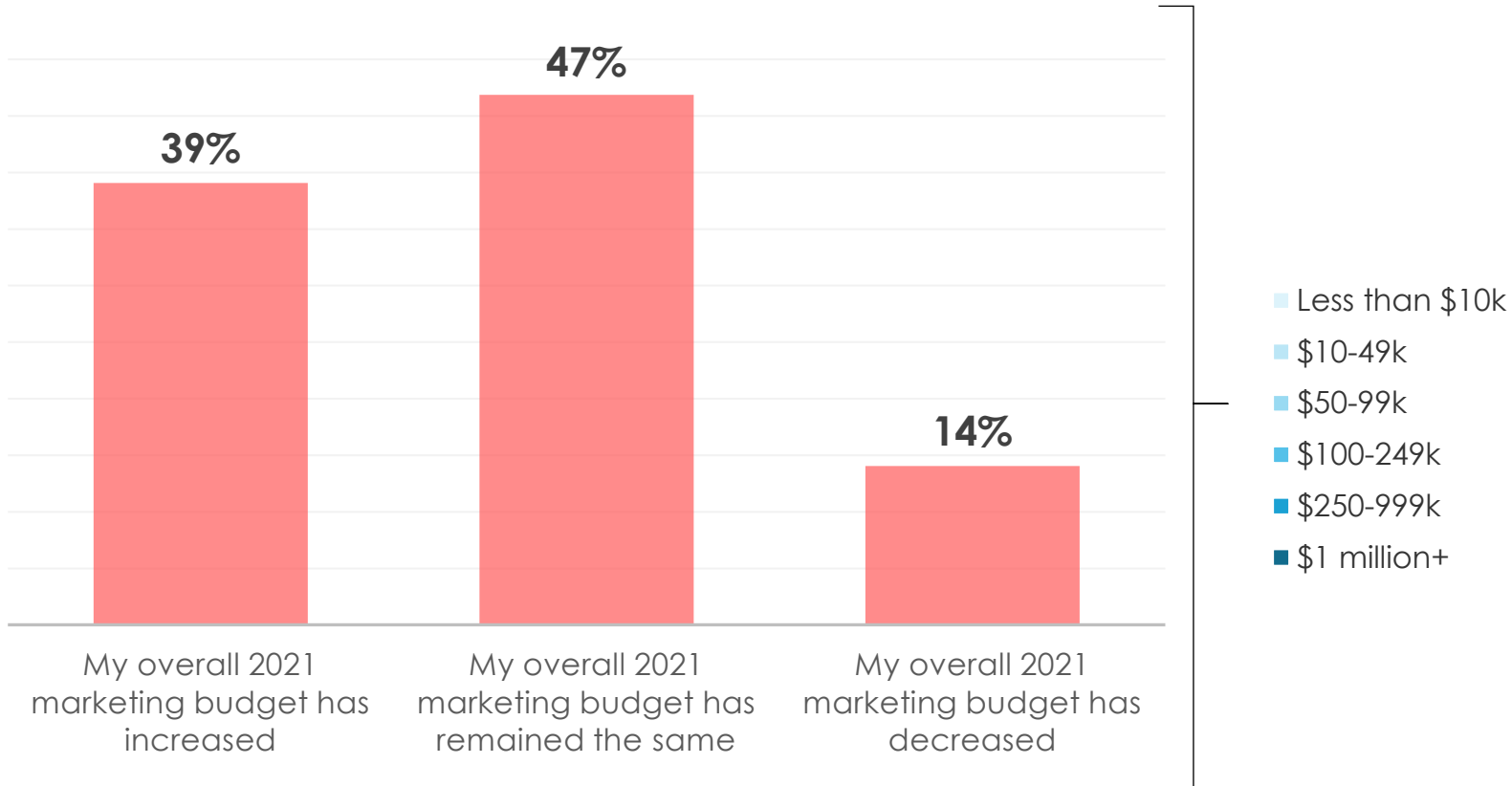


## 2021



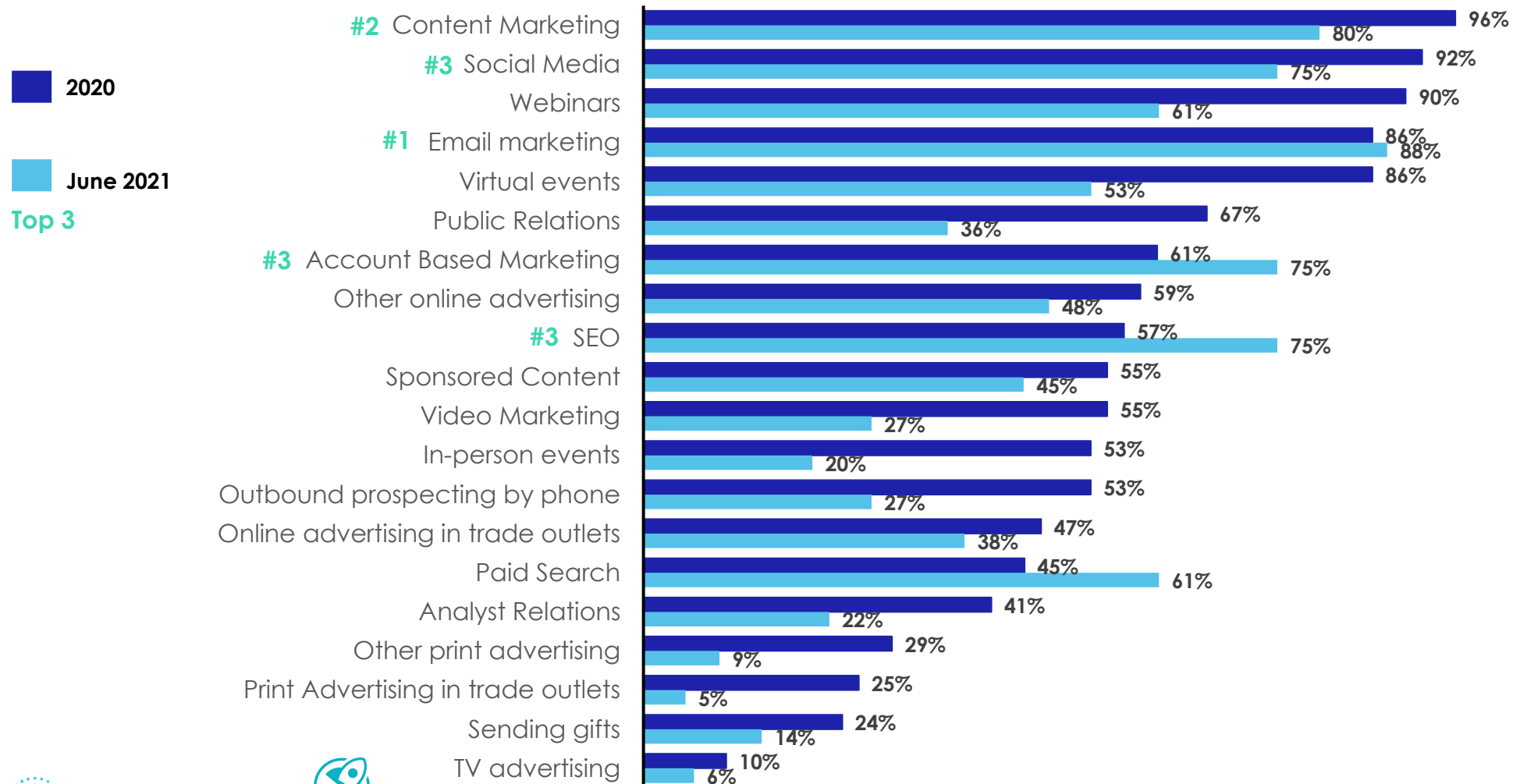
# And, more than 1-in-3 have seen a budget increase, so far in 2021, over their original 2021 budget

And, when thinking of your original 2021 budget, please tell us which of the below best fits for 2021, now that we are nearly at the end of H1.



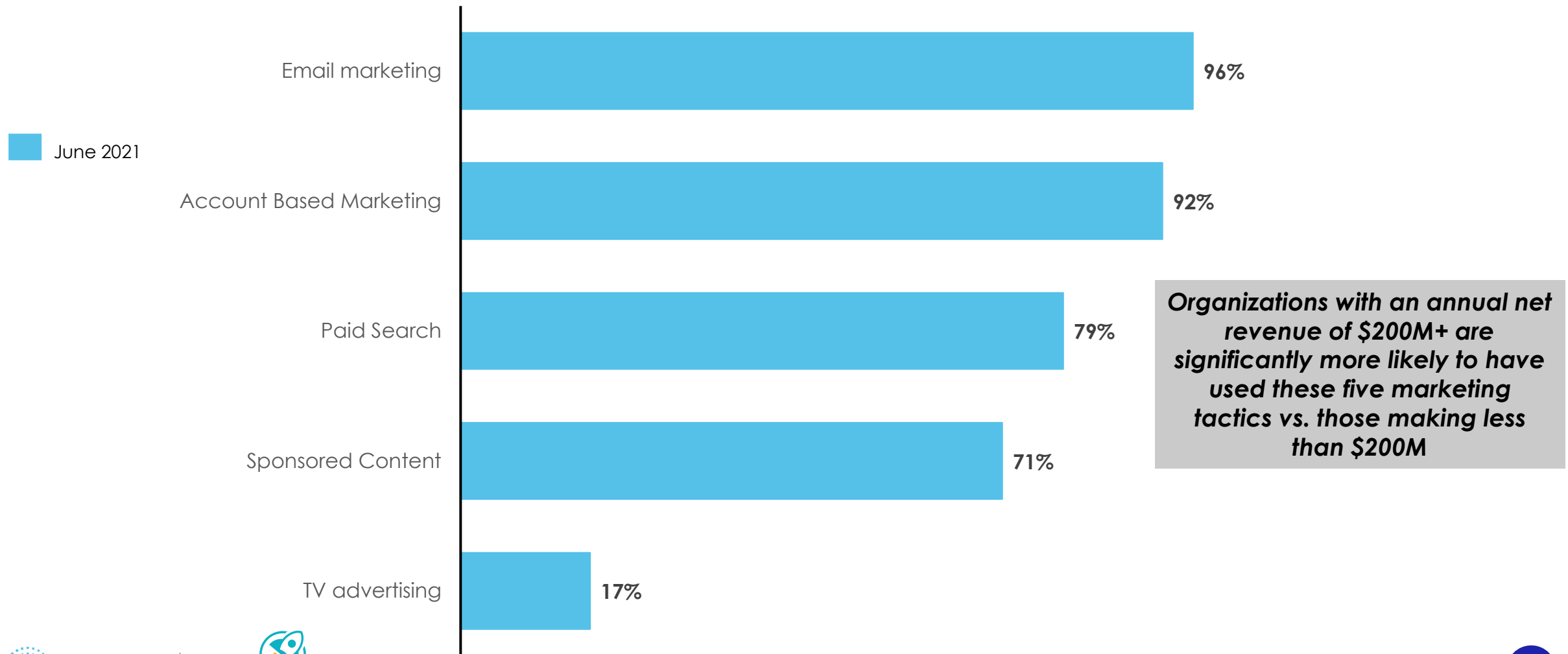
# The top most used tactics have shifted from 2020 into 2021

[In 2020 / So far in 2021], which of the below marketing tactics has your organization used?



# While organizations with higher revenues have a greater propensity to use email marketing and ABM as top tactics this year

[So far in 2021], which of the below marketing tactics has your organization used?

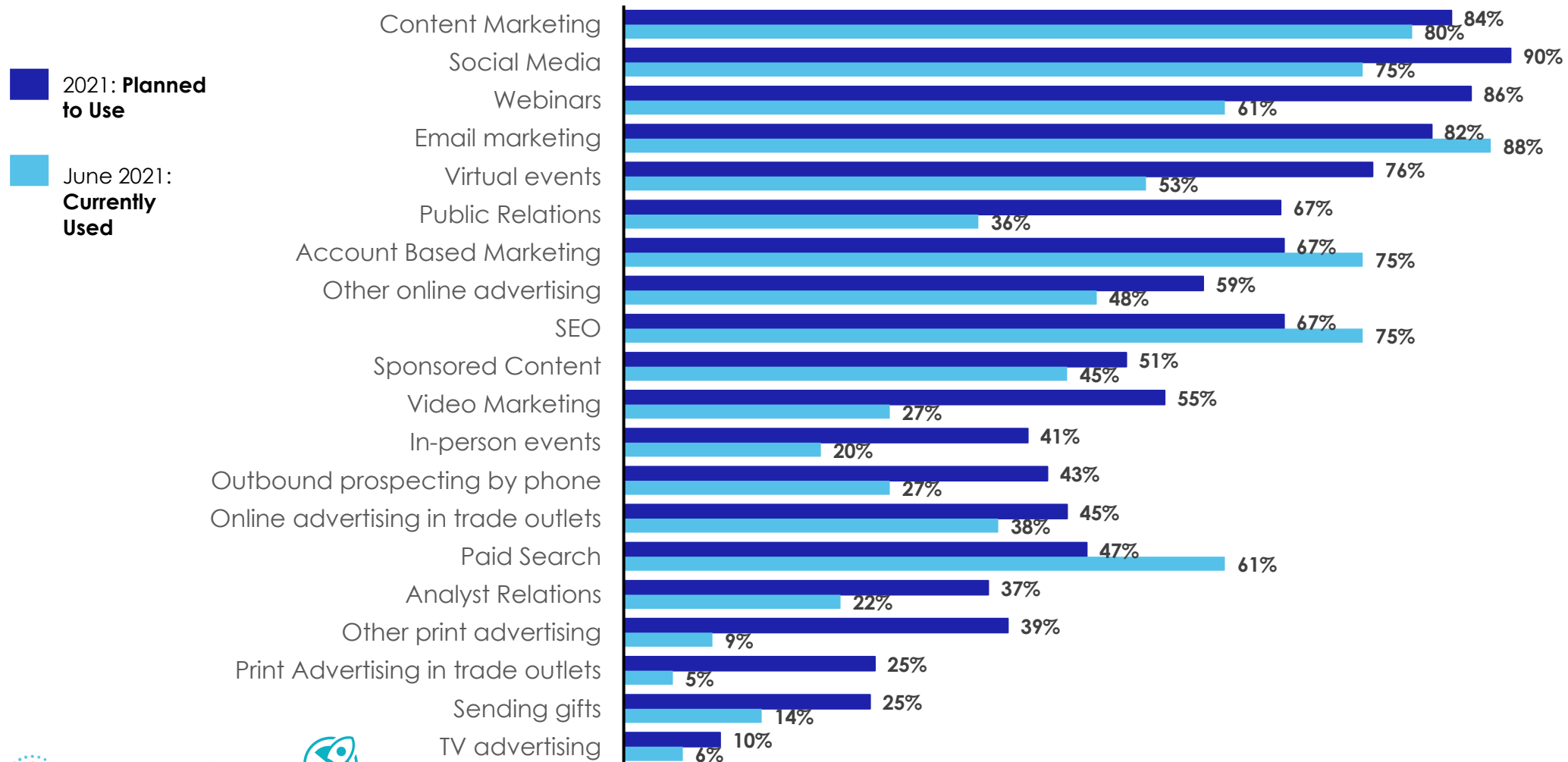




# The anticipated 2021 tactics currently fluctuate when looking at tactics used so far

In 2021, which of the below marketing tactics do you plan to utilize?

So far in 2021, which of the below marketing tactics has your organization used?

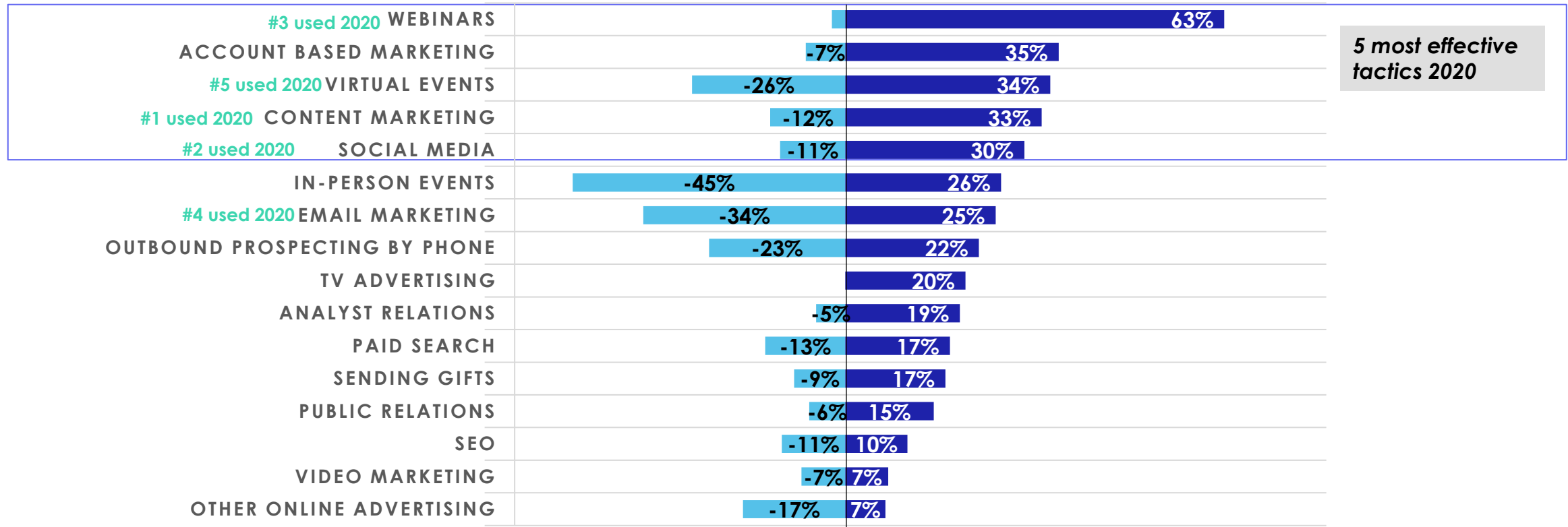


# Webinars and ABM were reported to be the most effective marketing tactics used by healthcare technology marketers in 2020

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And, of the 2020 marketing tactics you used, which tactics were most/least effective?

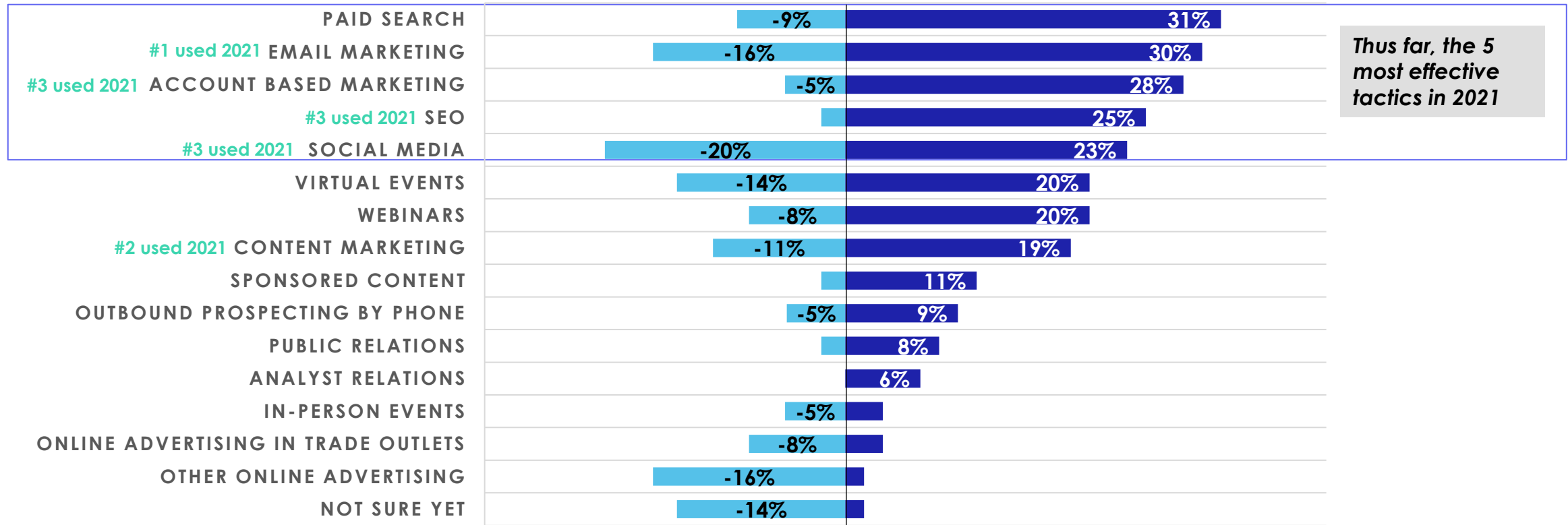
Among those who used tactic in 2021: ■ Least Effective ■ Most Effective



# Paid search is currently seen as most effective, in addition email marketing and social media continue be used often, though have mixed reviews

And, so far in 2021, of the marketing tactics you used, which tactics were most/least effective?

Among those who used tactic in 2021: ■ Least Effective ■ Most Effective



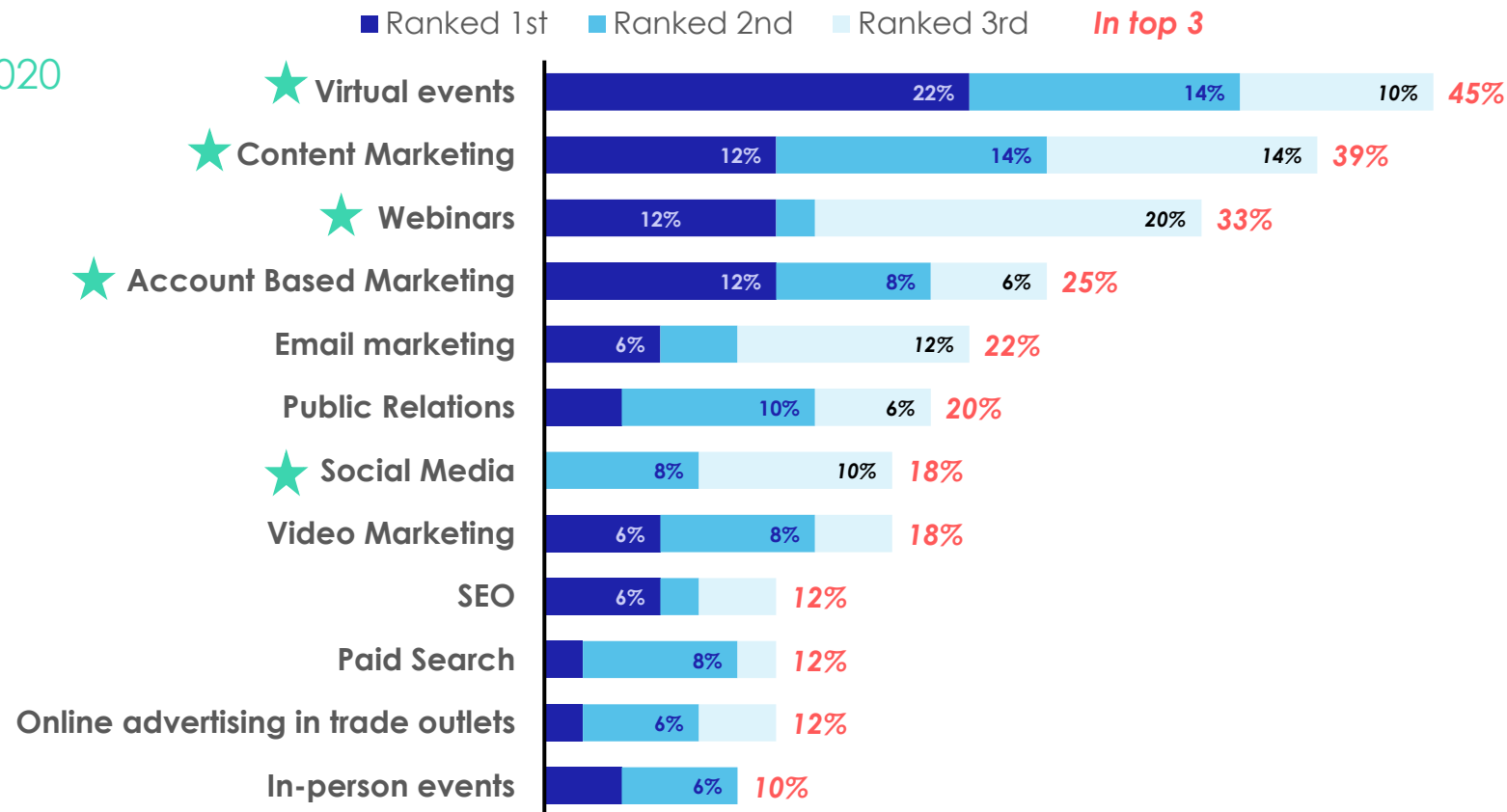
Base: Each tactic is based out of the total number who used that tactic in 2021. Category of neither most or least effective is left off this chart. %'s less than 5% not shown. Tactics less than 5% for most & least effective not shown.  
Base: Total Respondents: 2021 n=64

# Virtual events, webinars, and content marketing were planned to be the top investment areas for 2021

For 2021, please rank your top 5 marketing tactics by order of investment, where the '1' rank will be used for the tactic you plan to invest in most.

## 2021 Plan

★ Top 5 most effective in 2020

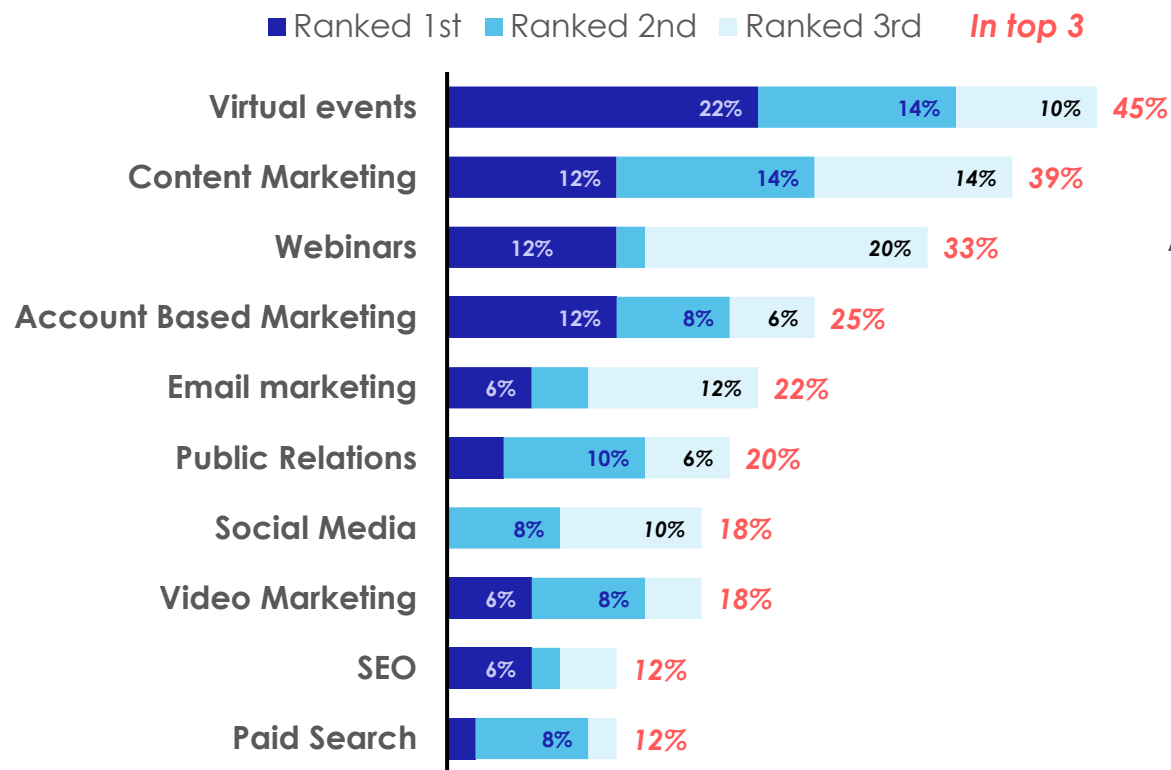


5% or less labels not shown on bar chart  
Labels less than 5% not shown. Tactics less than 10% for 'in top 3' not shown.  
Base: Total Respondents: 2020: n=51

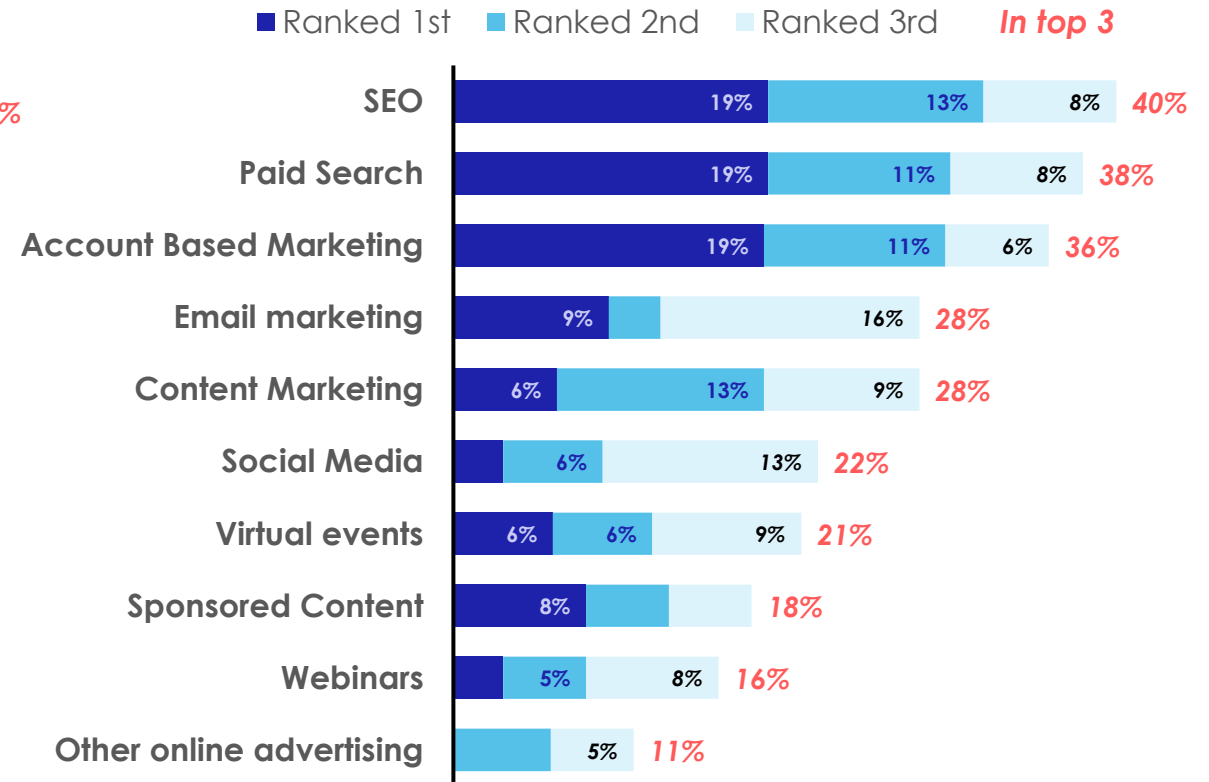
# Though, thus far, the actual areas of investment differ. The top Actual has a 22% higher investment than planned

In 2021, please rank your top 3 marketing tactics by order of investment, where the '1' rank has been the tactic you have spent the most. And, '2', for the 2nd largest investment.

## 2021 Plan



## 2021 Actual



# *Some of the Top Challenges Currently Faced*

“Selecting the right approach to reach the target audience

“Quantifying ROI

“Standing out in a sea of competitors

“Where to best spend budget

“Resources - staff is thin

“Competitive intel

“Commitment from senior management

“Sales not being able to visit prospects on site - marketing undertaking more work to combat that

# Key Takeaways

1

## ***Higher spends on marketing efforts have already been seen in 2021***

The median marketing spend of organizations in the healthcare technology space spent \$200k in 2020 and expected to see an average increase of 30% in 2021. However, many (39%) have seen an increase in their planned 2021 marketing budget and the current median spend is already at \$268k for the present year.

2

## ***The top five marketing tactics in healthcare technology shifted in 2021***

At least 75% of marketing decision-makers at healthcare or healthcare technology organizations report using the following tactics in 2021: Email marketing (88%) now taking the lead in the #1 spot and held the #4 spot in 2020, followed by Content marketing (80%; previously #1 spot), and a tie for third place amongst Social media Account based marketing and SEO both coming in at 75%.

3

## ***Paid search is reported to be the most effective marketing tactic tool used in 2021 thus far***

Marketing professionals who used Paid search (31%), followed closely by Email marketing (30%) during 2021 reported these to be the most effective marketing tactics of the year so far. These tactics were not even shown as a top five in 2020, instead Webinars previously held a significant lead. Account Based Marketing however, followed again this year, with 28% (vs. 35% in 2020) of users reporting this was the most effective tactic.

4

## ***Looking at the top investment plans for 2021, they vary from the current 2021 actual***

The investment plans ranked in the overall top three for 2021 were Virtual events (45% predicted vs. 21% actual YTD), Content marketing (39% predicted vs. 28% actual YTD) and Webinars (33% predicted vs. 16% actual YTD). Instead, we saw an upward shift towards SEO (40%), Paid search (38%) and Account based marketing (36%) being invested in most often.

# *Thank You*

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