

Annual eHealth Benchmark Survey

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Healthcare organizations are continually improving their websites — they’re adding more health content, implementing more transactional functionality and providing more personalized features. They obviously understand the value of the Web in maintaining a competitive position and building relationships with key constituents. But how much are they really investing in their websites? And what functionality are they adding to their sites?

Geonetric’s eHealth Insights survey set out to answer these questions. We surveyed healthcare IT, marketing, eHealth and Web professionals across the country and asked them to identify the functionality they have on their sites and the resources they devote to their Web initiatives.

Site Functionality

The survey identified ten website features that are nearly universal among healthcare websites; these include maps, physician finders, employment information, and event calendars. These core capabilities provide key information about the organization (i.e., maps, physicians and events) and allow visitors to interact with the organization online (i.e., submit job applications and online donations). (Figure 1)

When we combine the features organizations have on their sites with those they plan to implement (Figure 2), it’s easy to identify the most widely adopted features. The results tell us that respondents are implementing a tremendous amount of new functionality. Here’s what we discovered:

- Several of the leading capabilities, such as online donations, content management systems and health libraries, have high adoption levels now and show a continuing interest over the next year.
- Features that are becoming popular include e-newsletters, quality reports and social bookmarking.
- A number of features have begun to plateau, such as clinical trials and baby photos. They are generally in place for nearly all organizations that plan to offer them.
- There’s a growth in real-time credit card processing. This is likely due to new payment card industry standards that prohibit the manual processing of online credit card transactions.

We look next at the most popular capabilities organizations are adding to their sites. These up-and-coming features include clinical capabilities, such as portal technology and personal health records; social and community technologies, such as blogs and discussion boards; and financial applications, such as real-time credit card processing and bill payment (Figure 3). The diversity in these capabilities illustrates the broad role that Web-based technology is playing in the healthcare landscape. From clinical information to marketing to IT to finance, all areas within the organization are using the Web to improve communications.

Top 10 Currently Deployed Site Features

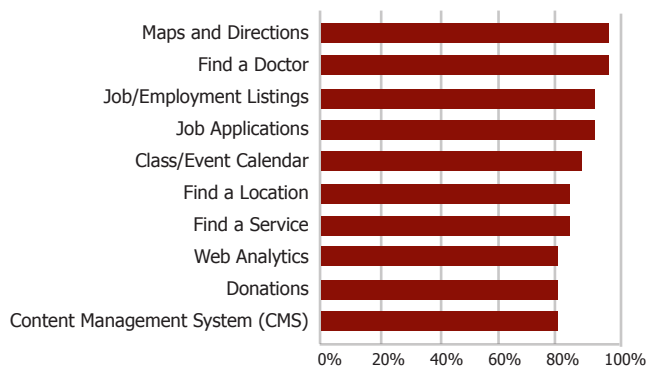


Figure 1

Top 25 Site Features - Predicted

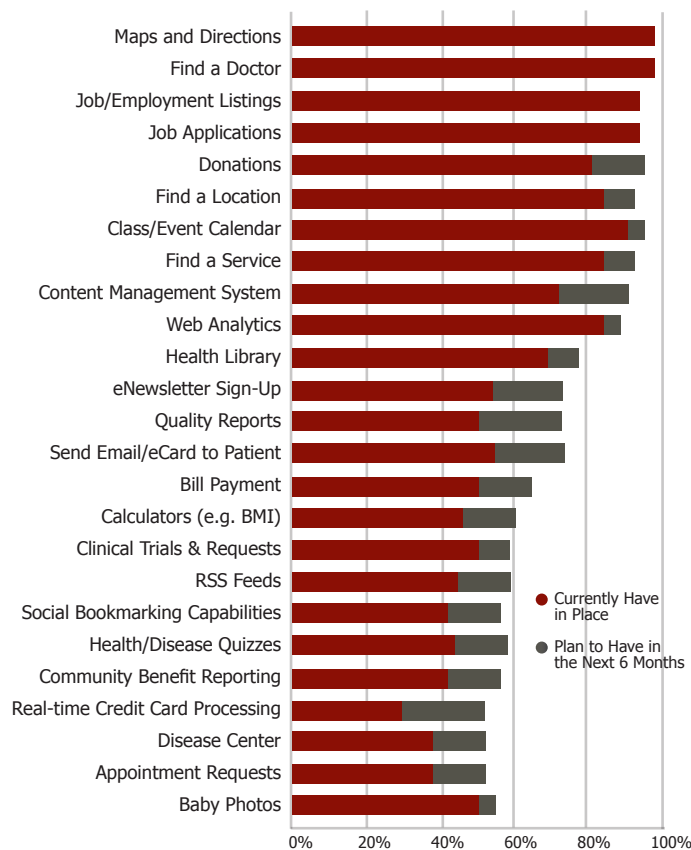


Figure 2

Portal Features

Approximately 25% of respondents are planning to add portal technology to their websites this year. Although this number may seem dramatic, it's actually lower than we anticipated. Portals create more personalized Web experiences for health consumers and patients, and they help organizations meet the looming changes in the regulatory landscape.

Meaningful use regulations, the standards required to receive funds under HITECH, will soon require healthcare organizations to share clinical information with patients electronically. In fact, guidelines by the CCHIT (the meaningful use certification body) mention that access to some personal health information must be provided online; therefore, supplying personal health information on a USB drive or CD will not be acceptable.

In our 2009 survey on healthcare reform, nearly 65% of respondents indicated that achieving meaningful use objectives is an important or very important priority for their organization. As a result, we asked respondents to this survey for more details about their portal plans. A small number of respondents (only eight total) answered our questions; this is likely due to the newness of portals in healthcare and respondents' lack of a defined portal plan. While this makes it difficult to draw strong conclusions, the responses provide some insight into the priority of various portal components.

Portal features high on the priority list include self assessment tools, such as symptom checkers and health risk assessments. Also popular are core transaction capabilities, such as secure messaging, pre-registration (with the ability to save data), bill presentation and appointment requests.

A login for the portal tops the list of features currently implemented; however, it has a surprisingly low 75% adoption rate. That indicates 25% of organizations have a portal without a login. To meet our definition of a portal – which represents a personalized, individualized online experience – it must have a login. This tells us organizations may be using the term portal differently; it may also be used as a proxy for website.

Staff and Dollars

It's tricky to measure the resources organizations apply to their online initiatives. Some firms manage their online initiatives in-house with a large staff, while other organizations outsource their efforts and account for all resources in terms of dollars. Add to that the differing sizes of organizations and it's obvious why comparing apples-to-apples is difficult.

Our solution is to use a total cost of ownership metric on a per-bed basis (bed size is the best proxy we have to measure organizational size). Assuming a fully-loaded cost per full-time equivalent (FTE) of \$60,000, we use the following calculation:

$$\frac{\text{Average Annual Investment} + (\$60,000 * \text{FTEs})}{\text{Bed Count}}$$

According to the results:

- The average annual investment, not including salaries is \$136,111.
- The average annual investment per bed, not including salaries is \$315.
- The average number of beds per website team member is 148.
- The average annual salary per bed is \$293.
- The average total cost of ownership per bed, including investment and salaries is \$608.

Top 25 Site Features - Up and Comers

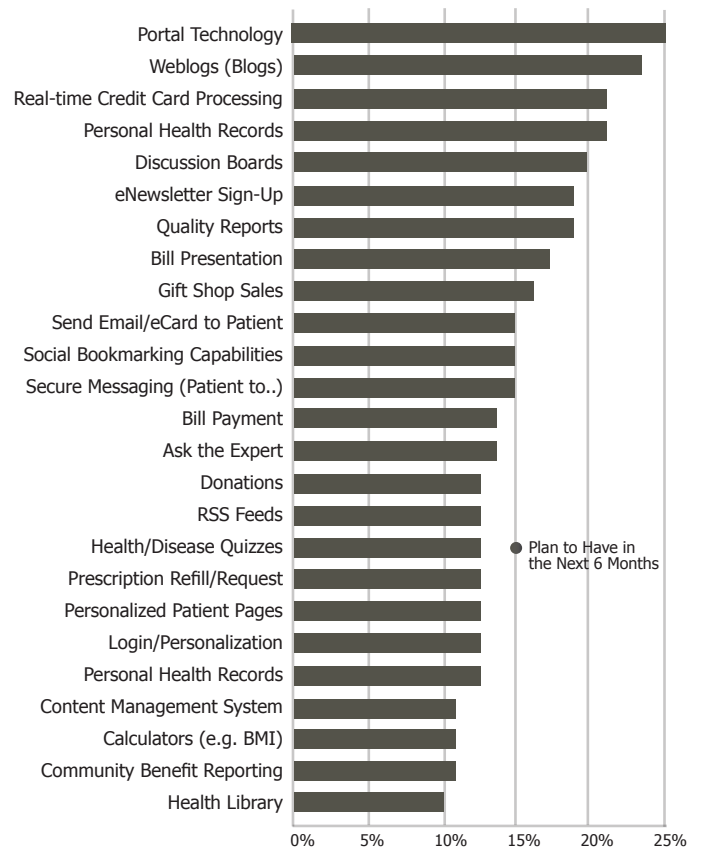


Figure 3

Over the past two years, the average total cost of ownership has increased by approximately 5%. (In our 2008 benchmarking survey, the median total cost of ownership was \$583.) Despite the economic turmoil during this time, the role of the Internet in healthcare has remained strong. There has been a modest shift in resources from traditional marketing channels into online channels to compensate for lower marketing and communications budgets.

The Shift in eHealth

The importance of eHealth tools have grown dramatically over the past year and will continue to do so this coming year. More resources are being devoted to online initiatives as healthcare organizations seek to connect with consumers, meet changing regulations, and gain a competitive advantage ... or simply to keep from falling behind.

Areas of investment online are varied as site managers seek to align consumers' online experience with their other healthcare experiences. Hospital websites still continue to be a source of educational materials and marketing outreach; however, websites are moving toward becoming a gateway for routine transactions, such as appointment scheduling and bill payment, and are beginning to facilitate clinical interactions through personal health records and patient portals.

The movement into patient portals represents the next major paradigm shift for eHealth. Over the past several years, more organizations have begun to use their websites for administrative and supportive functions, and the adoption of portal technology indicates shifts in the future role of online technology.

Portal Features - Predicted Adoption

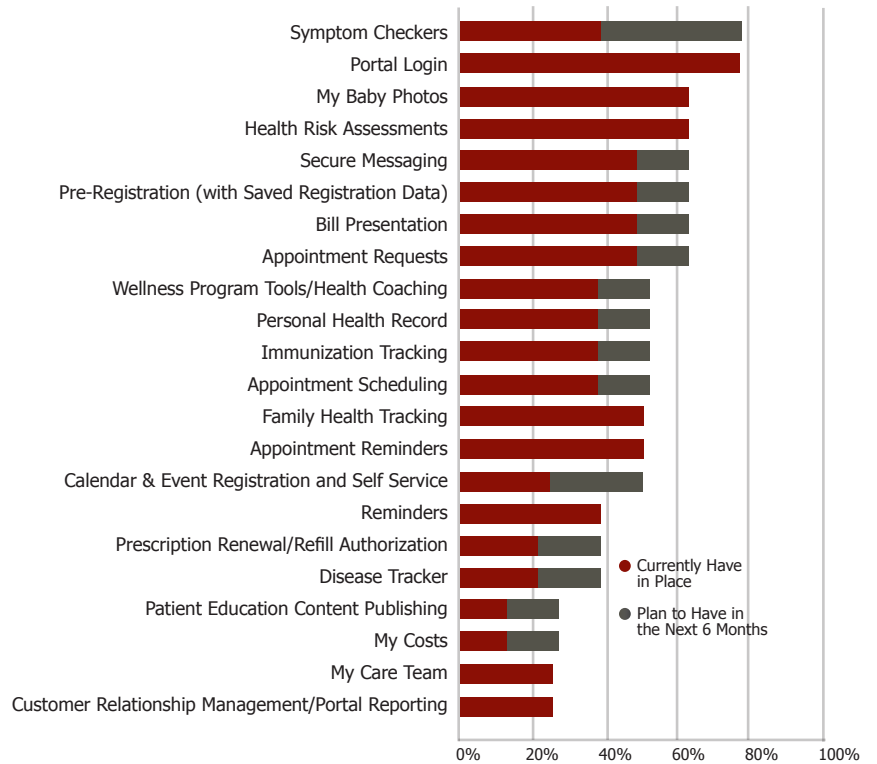


Figure 4