



Overcoming Disruptors in Primary Care

How the right marketing
strategy can help sustain and grow
traditional primary care practices.



Fluctuating market forces such as the pandemic, technology innovation, and shifting consumer expectations have made primary care ripe for disruption. Many non-traditional players are entering the industry, offering new models of care delivery aimed at tackling longstanding healthcare challenges.

Big box retailers like CVS, Walgreens, and Walmart are building out primary care clinics as extensions of their pharmacies to make care more accessible.¹ Tech-focused direct-to-consumer (DTC) healthcare companies are expanding and using digital strategies to rebrand the patient care experience as more patient-centric, convenient, and cost-effective.² And health insurance companies and health systems are buying up primary care practices at an increasing rate, in an effort to improve care coordination.³

These disruptors will have a significant impact on the traditional primary care model.¹

In this article, we explore the changing face of primary care and media strategies to help retain and grow practice patient populations.

¹ Rajiv Leventhal, "Primary Care Disruptors: The Transformation of Primary Care Delivery Is Upon Us," *emarketer.com*, Insider Intelligence, October 6, 2021, <https://www.emarketer.com/content/primary-care-disruptors>.

² Nina Thiesen, "Direct-To-Consumer Health Isn't Going Anywhere," *htdhealth.com*, HTD, May 14, 2021, <https://htdhealth.com/insights/direct-to-consumer-health-isnt-going-anywhere/>.

³ "Can independent primary care doctors survive dominance of hospital health systems?" *The CT Mirror*, April 10, 2021, <https://ctmirror.org/2021/04/10/can-independent-primary-care-doctors-survive-dominance-of-hospital-health-systems/>.



The New Face of Healthcare

The U.S. national healthcare expenditure equated to \$4.1 trillion in 2020 and is estimated to reach \$6.2 trillion by 2028.⁴ Various non-traditional players have a different approach to enhancing current healthcare systems and are looking to own a part of this multi-trillion-dollar market.

CVS, Walgreens, and Walmart are beginning to offer primary care services in their stores, leading with transparent and consistent pricing to beat out traditional care models. Amazon has also recently announced plans to open brick-and-mortar health clinics in twenty U.S. cities.⁵

CVS

Turning stores into destinations that offer healthcare services ranging from flu shots to diagnostic tests, beginning Spring 2022.⁶

Walgreens

Opening at least 600 Village Medical Clinics, in-store clinics staffed by full-service physicians, across the U.S. by 2025.⁷

Walmart

Rolling out 4,000 clinics offering primary care and other services across the U.S. by 2029.⁸

4 "US Healthcare Industry in 2022: Analysis of the health sector, healthcare trends, & future of digital health," insiderintelligence.com, Insider Intelligence, January 11, 2022, <https://www.insiderintelligence.com/insights/healthcare-industry/#:~:text=%244.1%20trillion%20in%202020>.

5 "Amazon care expands telehealth virtual clinics," Stat News, Feb. 8, 2022, <https://www.statnews.com/2022/02/08/amazon-care-expands-telehealth-virtual-clinics>

6 Jamie Grill-Goodman, "CVS Closing 900 Retail Stores Starting in 2022," risnews.com, Retail Info Systems, November 22, 2021, <https://risnews.com/cvs-closing-900-retail-stores-starting-2022>.

7 Melissa Repko, "Walgreens boosts stake in primary-care company VillageMD with a \$5.2 billion investment," cnbc.com, CNBC, October 14, 2021, <https://www.cnbc.com/2021/10/14/walgreens-buys-majority-stake-in-primary-care-company-villagemd.html>.

8 "Walmart to Open 4,000 Healthcare 'Supercenters' by 2029 That Include 'Comprehensive' Clinical Laboratory Services," darkdaily.com, Dark Daily, May 3, 2021, <https://www.darkdaily.com/2021/05/03/walmart-to-open-4000-healthcare-supercenters-by-2029-that-include-comprehensive-clinical-laboratory-services/>.

Direct-to-consumer (DTC) models and startups backed by private equity and venture capital funding are another outside player looking to enter the healthcare market. In Q4 2020, venture capital funding for digital health totaled \$4.5 billion globally—a 165% increase from Q4 2019.⁹ The DTC business model is centered on being accessible, technology-focused, patient-friendly, and personalized. The models range from concierge services, to monthly/yearly memberships, to programs focused solely on the Medicare population.

Industry consolidation also is a disruptor. Health insurers are buying up primary care practices to gain more control of healthcare delivery, and hospital systems are pursuing mergers and acquisitions to increase their market share.¹⁰ Last year was a record year for healthcare deals.¹⁰ Mergers and acquisitions increased by 25% compared to 2020.¹⁰ Practices owned by hospitals/health systems increased by 8% from 2019 to 2021, and practices owned by corporate entities increased by 51% during the same period.¹¹



In order to sustain and grow a patient base, traditional primary care practices will need to address the perceived benefits of these disruptors – efficiency, convenience, accessibility – and showcase their value to existing and new patients.

⁹ "Walmart to Open 4,000 Healthcare 'Supercenters' by 2029 That Include 'Comprehensive' Clinical Laboratory Services," darkdaily.com, Dark Daily, May 3, 2021, <https://www.darkdaily.com/2021/05/03/walmart-to-open-4000-healthcare-supercenters-by-2029-that-include-comprehensive-clinical-laboratory-services/>.

¹⁰ Heather Landi, "The top 10 healthcare M&A deals of 2021," fiercehealthcare.com, Fierce Healthcare, December 14, 2021, <https://www.fiercehealthcare.com/special-report/top-10-healthcare-m-a-deals-2021>.

¹¹ 2022 Environmental Scan. PDF file. 2021. <https://www.aha.org/system/files/media/file/2021/11/2022-Environmental-Scan.pdf>.

Appeal to Patient Sentiment to Combat Disruptors

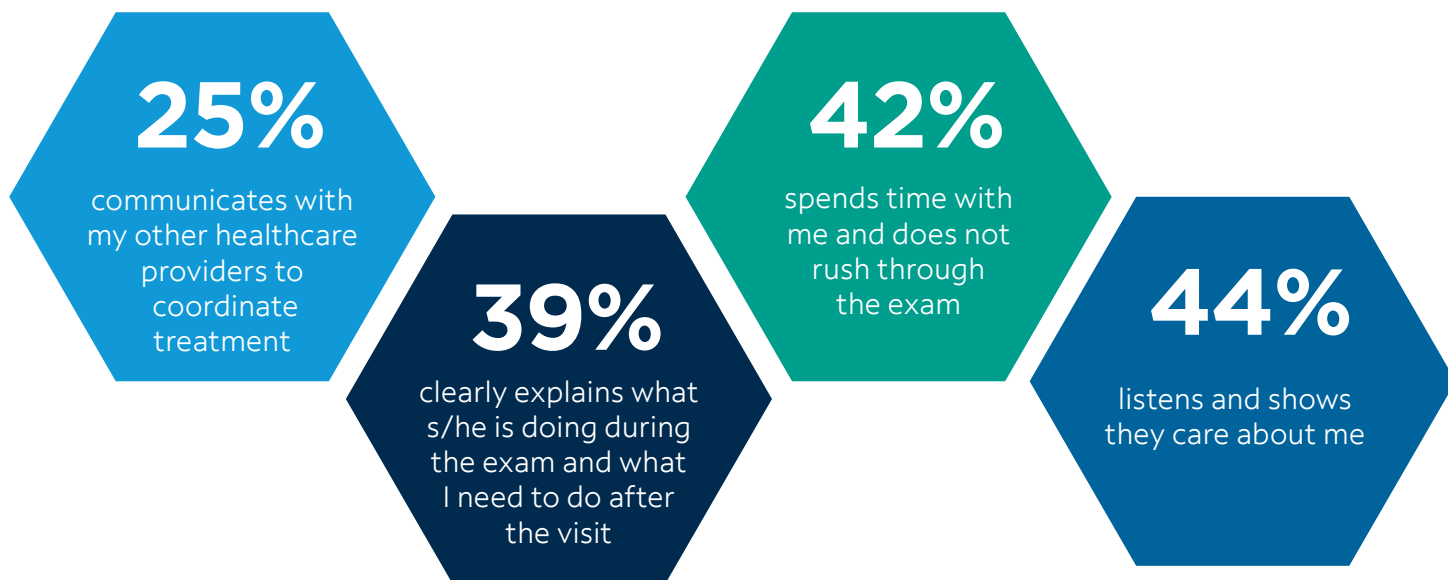
The ability of PCPs to retain patients and grow their practice, despite the many disruptors in the market, will largely depend on their understanding and focusing on three current patient sentiments to guide their marketing strategy.



1. Trust

According to the Deloitte Survey of US Health Care Consumers, the top factors for “an ideal healthcare experience” all speak to having a trusted clinician relationship.¹² Patients want doctors who listen to and care about them, who don’t rush, and who can communicate clearly.

Most Important Factors for an Ideal Experience with a Doctor¹³



Use brand-building tactics like multiscreen advertising to strengthen awareness about the value of a patient-friendly, high-touch PCP relationship. In addition to increasing reach and frequency, multiscreen advertising makes ads 40% more memorable.¹⁴

¹² Deloitte 2020 Survey of US Health Care Consumers.

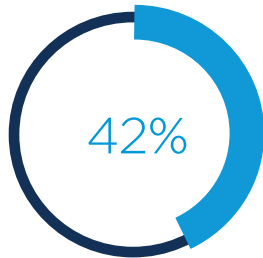
¹³ David Betts, Leslie Korenda, Shane Giuliani, “Are consumers already living the future of health?” deloitte.com, Deloitte, August 13, 2020, <https://www2.deloitte.com/us/en/insights/industry/health-care/consumer-health-trends.html>. [Note: This study is currently the newest on the topic of ideal patient experience and is updated every two years.]

¹⁴ Neuro-insight (SST) UK; Difference in brain activity when watching TV content and ads v. interacting online (web browsing, on demand TV and search); 2 - Omnisend’s Annual Report, 2019.

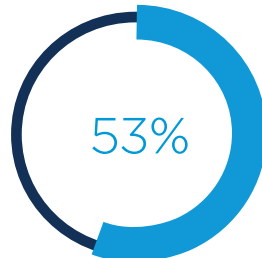


2. Hybrid services

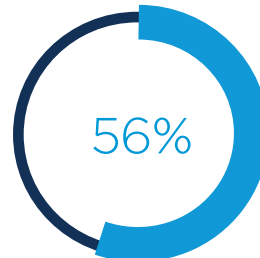
Consumers using virtual visits increased from 15% in 2019 to 28% in 2020.¹⁵ Despite this explosive growth in virtual visits, preferences for in-person and hybrid care remain high.



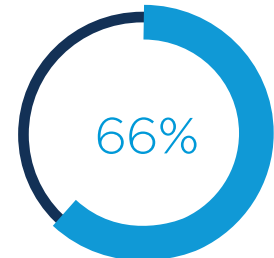
of consumers say they'd prefer hybrid care, which would include both virtual and in-person visits.¹⁶



of adults still prefer in-person care.¹⁶



don't think they get the same quality of care/value from a virtual visit as from an in-person visit.¹⁵



of adults believe that a doctor or nurse needs to physically examine them to understand their health needs.¹⁵

Access to aggregated and de-identified first-party data, paired with aggregated third-party healthcare segment data, helps build a smarter campaign that targets the right patients in a privacy-compliant manner. With accurate profiles of virtual care and hybrid-care users, primary care providers can better find and reach patients when and where they consume media, highlighting the accessibility and quality of their services.

3. Safety



Patient safety, the prevention of errors and adverse effects, has always been a priority in healthcare, but now, consumers are prioritizing it even more. According to The Beryl Institute's Consumer Perspectives on Patient Experience 2021 report, 75% of consumers see safety as an important part of the patient experience.¹⁷ This is up 7 points from the 2018 report.

Aligning the right creative message with the needs of the patient is essential to marketing success. With specific and relevant messaging about how a practice prioritizes safety, providers can meet their patient's needs head-on and generate interest in their services.

Successful practices will build a media strategy that addresses these sentiments and drives home their practice's unique value, using aggregated and de-identified data and insights to ensure their message reaches the right patients.

¹⁵ David Betts, Leslie Korenda, Shane Giuliani, "Are consumers already living the future of health?" deloitte.com, Deloitte, August 13, 2020, <https://www2.deloitte.com/us/en/insights/industry/health-care/consumer-health-trends.html>.

¹⁶ Rhea Patel, "Telehealth is booming, but consumers still prefer in-person care—which is why hybrid in-person/virtual care models will prevail," eMarketer.com, Insider Intelligence, November 4, 2021, <https://www.emarketer.com/content/telehealth-booming-consumers-still-prefer-in-person-care-which-why-hybrid-in-person-virtual-care-models-will-prevail>.

¹⁷ Wolf, Jason A. Consumer Perspectives on Patient Experience 2021. PDF file. 2021. https://cdn.ymaws.com/www.theberylinstitute.org/resource/resmgr/executivebrief/Consumer_Perspectives_Execut.pdf.

Spectrum Reach Can Help

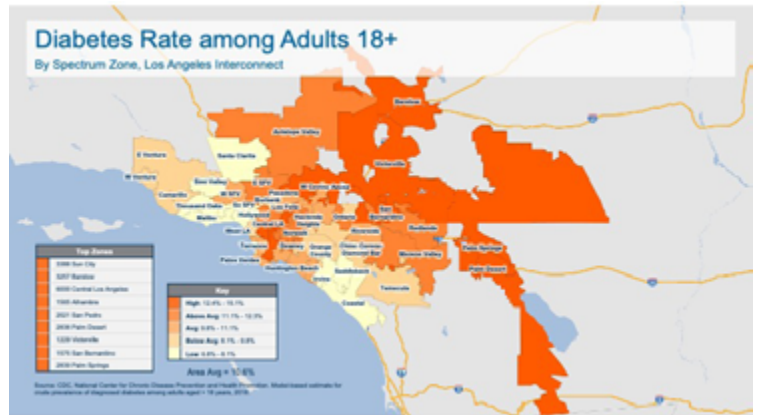
Protecting share of the market and patient retention are vital to a thriving practice. And Spectrum Reach is here to help. We offer simple, effective, and measurable healthcare advertising solutions to help primary care practices reach patients, grow their practice, and improve the health of their community.

Data and insights

We provide aggregated and de-identified data and insights to find and reach audiences. Our ability to target audiences by the primary service area or zip code, coupled with our extensive privacy-compliant viewership data, allows us to build the ad schedule that will be most effective. We can build a profile that ensures advertisers are getting the most out of their advertising dollars.

Reaching audiences

Our mapping system contains CDC data that shows geographic areas with the highest propensity for common medical conditions or unhealthy behaviors. This means healthcare providers can tailor their advertising to a specific type of patient. For example, if an advertiser's practice is promoting cholesterol and blood pressure screenings, we can identify the geography or zip codes –using aggregated and de-identified data– with the highest rates of heart disease. HIPAA-compliant data segments can also be utilized to build targeted online campaigns.



Our rich aggregated and de-identified first-party data paired with third-party data helps target patients in a privacy-compliant manner by zip code and propensity for common medical conditions.



Targeting across screens

Today, consumers are more connected than ever. The average U.S. household has 25 connected devices.¹⁸ Patients are frequently shifting between watching a TV screen, to looking at a mobile device, tablet, or desktop computer.¹⁹ A media strategy should reflect this. With advertising solutions that include linear TV, streaming TV, display, online video, search, and social media, Spectrum Reach can help reach patients on every screen. Plus, with our online campaign reporting tool, AudienceTrak, advertisers can see when and where their ads are running and know that their campaign is working.

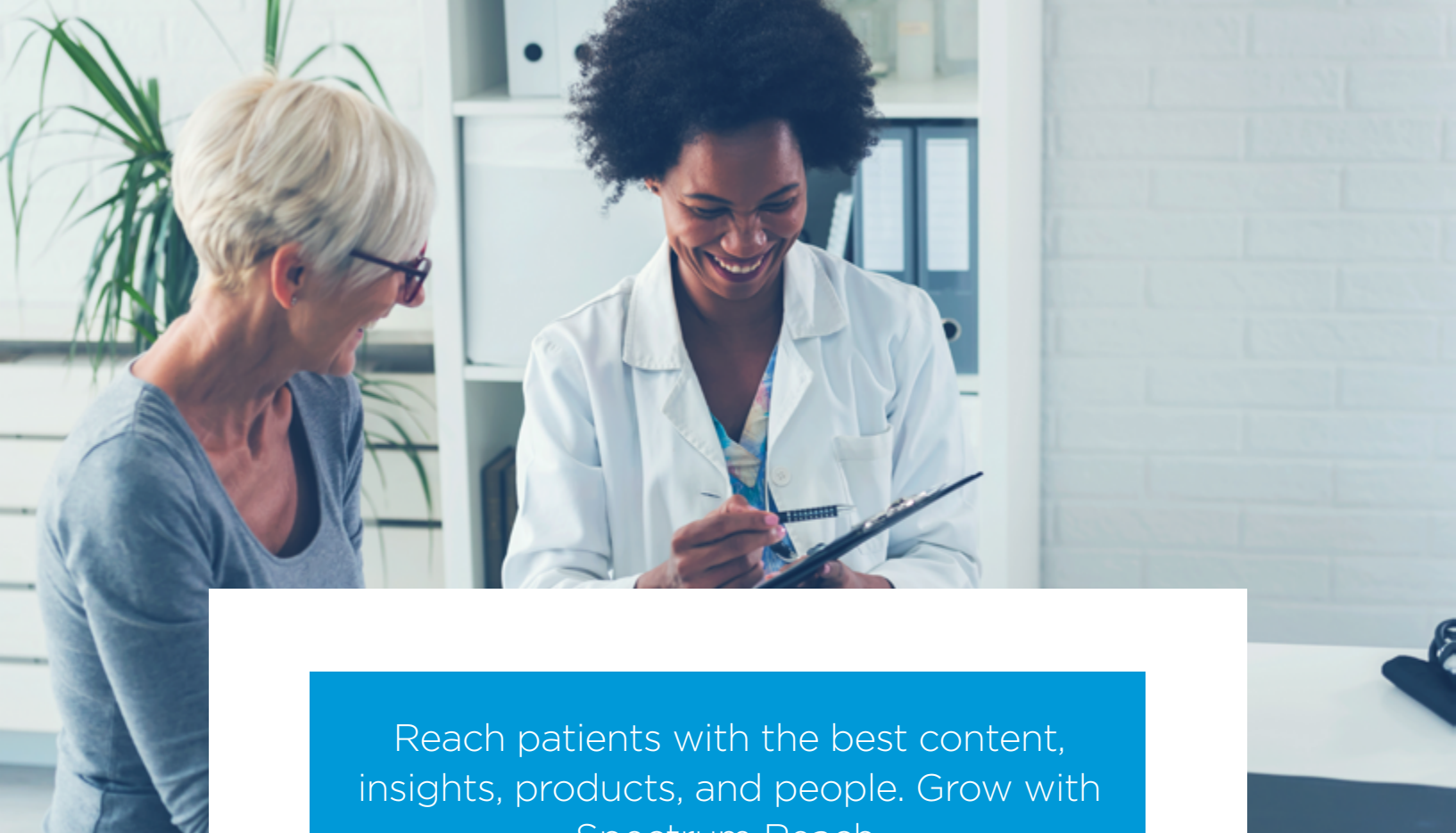
¹⁸ Deloitte Connectivity Mobile Trends Survey, June 2021.
¹⁹ Kagan's U.S. Consumer Insights Survey, March 2021.



TV + Digital Marketing = The Most Effective Way to Advertise

- When streaming TV is added to a traditional TV-only advertising campaign, the reach of a campaign could increase by 28%.
- In a typical multiscreen TV campaign, the traditional TV portion boosts the streaming TV portion by +363%.
- On average, household exposure to an ad campaign more than doubles when advertising on both traditional TV and streaming TV, compared to traditional TV or streaming TV alone.

Source: Spectrum Reach AM Campaign Data. Date – 4th Quarter 2020. O&O & Partner Affiliates. Includes all campaigns with Streaming TV & Linear. Total Campaigns – 5,758. Streaming TV Lift - % of new HHs reached. Results based on averages, results will vary and not all campaigns will achieve +28% lift.



Reach patients with the best content, insights, products, and people. Grow with Spectrum Reach.

At Spectrum Reach, we're local advertising experts and a one-stop shop for the multiscreen advertising solutions needed to reach patients anywhere, on any screen. Our award-winning in-house creative agency, Kernel, is available to help create an engaging, custom-made campaign. Whether it's promoting a seasonal message (for example, "Be sure to get a flu shot!") or highlighting digital services, we can help healthcare providers tell the story that sets their practice apart.

We live and work in the neighborhoods we serve. And we know that, when your practice thrives, the health of our entire community improves. Ready to put the power of multiscreen advertising to work for your practice? Connect with a local expert today.

Get Started