

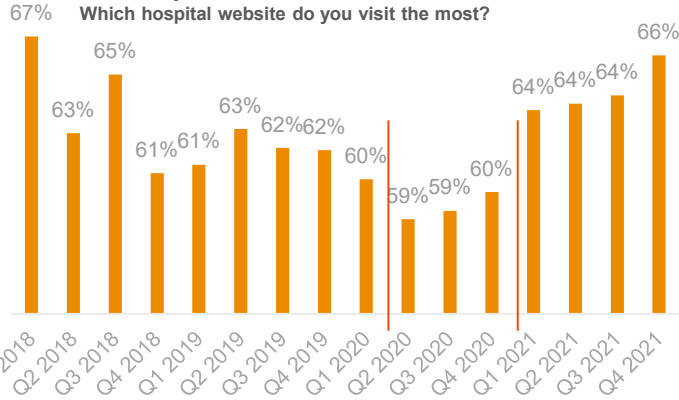
## NRC HEALTH MARKET INSIGHTS – NOVEMBER 2021

# Insight of the Month: Healthcare Advertising

Consumer recall of healthcare advertising has been on the decline since 2017. At the beginning of the pandemic in 2020, many hospital systems stopped advertising all together and recall saw those numbers decrease even more. With the introduction of the vaccine and the need to encourage consumers to “return to healthcare” most healthcare systems began marketing efforts again and the percent of consumers who recalled advertising shows that. Healthcare is both in the news everyday and many consumers are concerned about their overall health which could play a roll in the recall numbers increasing to 2018 numbers. Consumers are changing the way they consume healthcare advertising which could be a combination of how healthcare is advertising and how other industries influence how consumers remember advertising. Traditional recall has increased to pre-pandemic numbers, but it should be noted that social, website and online reviews have become more important to consumers and how they remember advertising.

### Advertising recall

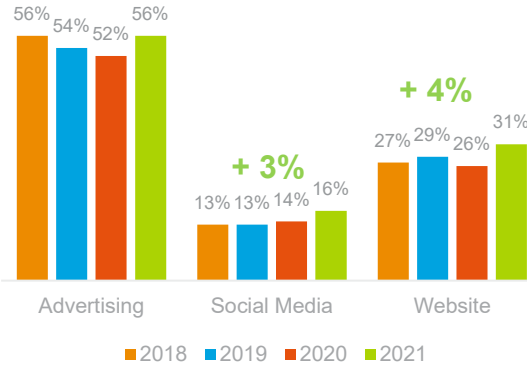
Q) Thinking of hospital advertising, which hospital's advertising comes to mind first?  
Who have you interacted with on social media the most?  
Which hospital website do you visit the most?



Healthcare advertising recall had been on the decline since 2018. The pandemic created more of a decline. In Q1 of 2021, many systems started to advertise which increased recall significantly and is now almost as much as the beginning of 2018.

### Advertising channel

+/- 0%



Traditional advertising has increased to pre-pandemic numbers, however, both social media and website is driving the trend of an increase of advertising recall.

### Advertising strategy

Consumers are changing the way they consume advertising in healthcare.

Mobile

- Those who say they will use mobile device to access healthcare information has increased from 41.8% in 2018 to 51.2% in 2021

Online reviews

- The percent of consumers who found online reviews useful increased from 29.6% in 2018 to 36.7% in 2021.

Social media

- Television remains the number one recalled platform. Social media has increased from 4.4% in 2018 to 10.8% in 2020 and is now the third most recalled advertising platform.