



**Healthcare Ecosystem 2021:**

# **Retail's Role in the Future of Care**

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## Introduction

As Uber and other brands continue consolidating services like ridesharing and takeout in one app, consumers are now looking for similar convenience across all areas of their lives. **Convenience has always been at the core of buying behavior — it's only been accelerated by the disruption of e-commerce — but there is still the burning desire and need to go on premises for healthcare and retail purchases.**

Because of the ever-changing consumer landscape, when consumers do go on premises, they want the convenience of an e-commerce experience. The ability to receive an eye exam, fill a prescription and pick up grocery staples all in one place is becoming less of a nice-to-have and more of a must have. Some retailers already offer this level of accessibility, but our data shows they are falling short on communicating that to their audiences.

Retail health clinics\* were already growing in popularity in the years leading up to the COVID-19 crisis, but the pandemic has accelerated changes in consumer expectations. To better understand this trend and the role of retail in the future of healthcare, UPshow surveyed 500 consumers and 250 retail healthcare executives across the U.S. **We found that many consumers increased their usage of retail health during the pandemic in an effort to make fewer trips and avoid overcrowded doctors' offices. The convenience they experienced will permanently alter their behavior.**

Retailers have a once-in-a-generation opportunity to redefine healthcare in this moment. If they can make the patient and shopper experience seamless, safe and even preferable to a traditional doctor's office, the future is bright for both business and consumer health.

What does a better experience look like for retail healthcare patients? It's supporting the patient with information as they visit — from sign-in at the waiting room to leaving with results through a downloaded app. But through better technology and communication on-site, the real opportunity is creating a Care + Commerce Ecosystem for each patient and positively impacting their wellness.

At UPshow, we know firsthand that a positive or negative patient experience sometimes happens even before customers see a provider or pharmacist. We build technology that allows retailers to support customers from the waiting room to a post-visit shopping trip, while collecting valuable feedback that helps turn loyal customers into repeat retail health patients. The consumers and healthcare executives we heard from made it clear that retail providers can do more and help define the next generation of healthcare.

\*Onsite clinics offer a range of care types including pharmacy, primary care, preventive care, physical exams, optometry, physical therapy, dental, chiropractic and cannabis.

## Key Findings

### 01 Big misconceptions about care are stalling conversions

- 1 in 10 consumers don't think retail health clinics take their insurance
- 61% of city residents completely trust retail health clinics' quality of care, compared to 52% of rural residents and only 48% of suburban residents

### 02 Retailers are leaving money on the table

- 1 out of every 2 pharmacy patients are willing to engage more with common retail health services
- Just 21% of retailers properly leverage their communication methods to encourage repeat visits
- Only 30% of retail healthcare companies leverage their communication methods to guide customers toward additional product purchases in the store

### 03 There's too much paper for a digital world

- Just 16% of consumers find paper pamphlets valuable, but they're the single most common communication method they encounter at retail health clinics
- Consumers rate mobile apps and web portals as the most valuable retail health interactions

### 04 COVID-19 has blown the door open for retail health

- 49% of consumers say they'd prefer to use retail clinics as opposed to standalone facilities for non-urgent health needs after the pandemic subsides
- 60% of retail healthcare executives say the COVID-19 pandemic has increased customers' spend per visit

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## THE LOWDOWN

## Consumer Confusion Heightens Because Retail Healthcare Needs to Connect the Dots

Nearly half of consumers aren't completely comfortable with the quality of care they believe retail healthcare can provide, and **1 in 10 are unaware these clinics accept most major insurers**. These misconceptions are turning customers off before they even enter the door, and clearing them up is a must for healthcare providers. To do so requires aligning on key **points of confusion** and **focusing efforts where they matter most**.

### Points of confusion:

#### Misinformation about insurance

Retail health patients need to be more aware of all the support options available to them, and insurance is at the top of that list. Customers need ways to determine if they're covered, and the data shows retail health providers aren't creating quick, easy access to that information.

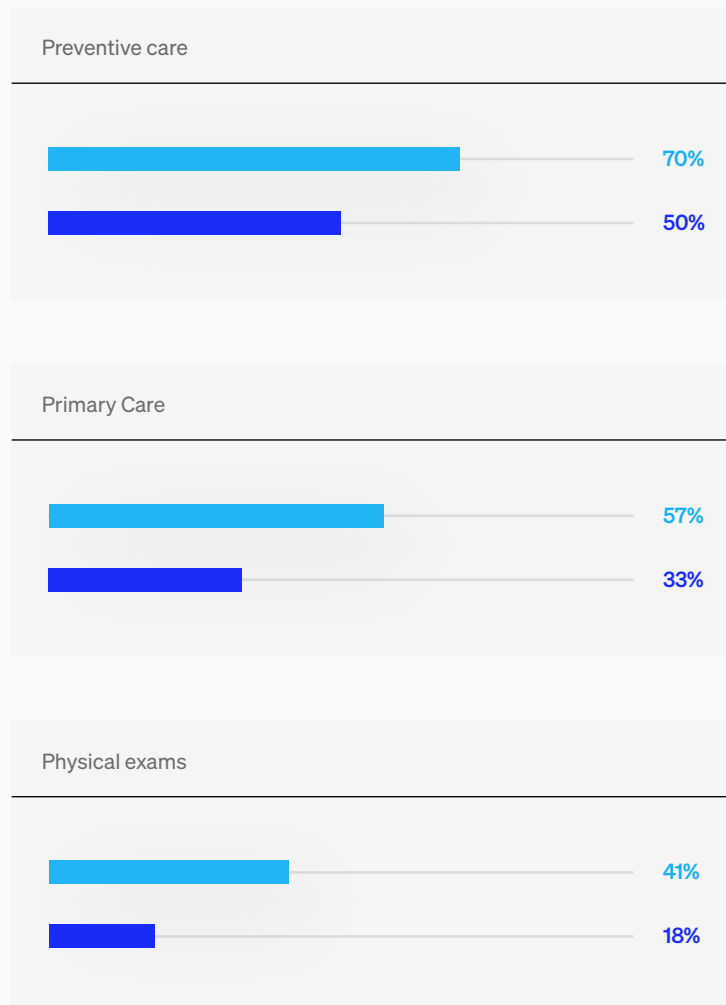
**Forty-seven percent of respondents said they're not completely confident in the quality of care provided at retail health clinics — and 11% weren't even aware that retail health clinics accept most major health insurers.** These numbers indicate there is still progress to be made in educating consumers about care and coverage in retail health.



## CONSUMER RESPONDENTS

## Gap between services used and services considered

- Services consumers **would consider using**
- Services consumers **have used** in the past 6 months



## Unclear healthcare offerings

Most consumers would consider using far more retail healthcare services than they actually use now, suggesting a lack of awareness around these offerings and also money left on the table. Additionally, it suggests some consumers don't trust certain retail health functions enough to convert from considering the services to actually using them.

## Where efforts matter most:

## City vs. suburbs

Retailers have a great opportunity for growth with suburban consumers. **Currently, suburban shoppers have the lowest confidence in retail healthcare: 61% of city residents** completely trust retail health clinics' quality of care, compared to **52% of rural residents** and **48% of suburb/town residents**. Certainly, city dwellers may simply trust the quality of care at retail health clinics more because of the convenience. Or, city dwellers may have fewer transportation options than their suburban counterparts and prioritize proximity as a result. Either way, retailers should strive to increase trust and market share among suburban consumers.



Nearly half of consumers aren't completely comfortable with the quality of care they believe retail healthcare can provide, and **1 in 10 are unaware these clinics accept most major insurance.**

## Welcome Shoppers

Have you gotten your flu shot this year?  
Our quick care clinic offers same-day flu  
shots and is located in aisle 12.

Want to get your flu shot another day?  
**Book a future appointment on our app.**



### THE OPPORTUNITY

## Augmenting Your In-Store Environment to Build Trust

The moment a customer walks into a retail store, their surroundings — everything from signage and wayfinding systems to brand graphics to in-store music — sets the tone for their experience. These consumers chose your location because they trust you have the products they need on hand. Now, you must make them just as confident in your healthcare capabilities and experience. Education, accessibility and relevance will help you succeed.

- Provide consumer education
- Make the education easily accessible
- Share relevant promotions
- Keep up-to-date on COVID-19

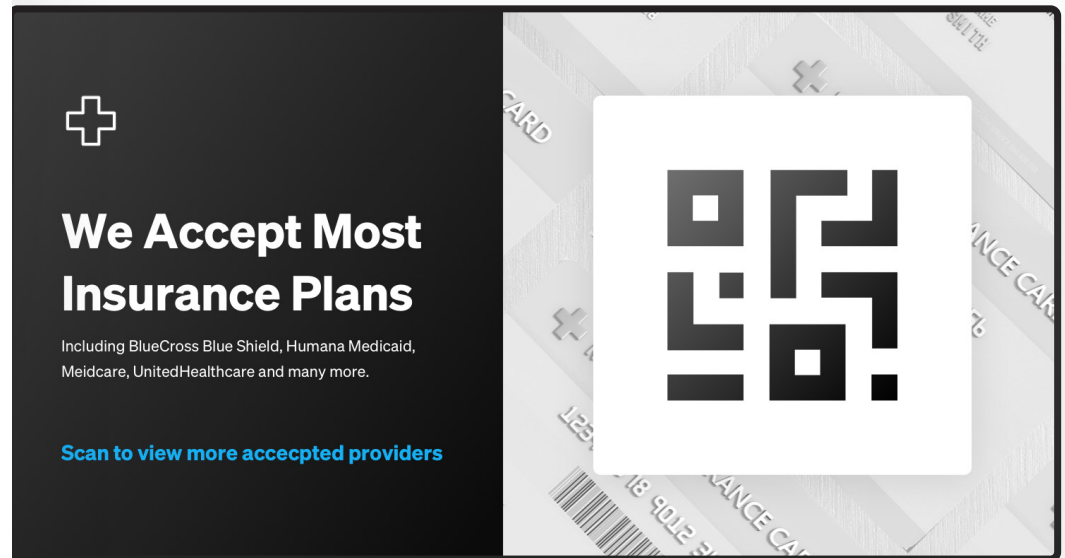


## Provide consumer education

With many consumers misinformed about the health insurance acceptance at retail health clinics, retailers have an easy win: Include lists and logos of the health insurers you accept at various touch points throughout the store. Additionally, consider short videos to explain the services offered and describe the health and cleanliness protocols you've enacted. These videos can either repeat on a display near the waiting area or be triggered by a QR code on signage throughout the location.

## Make the education easily accessible

Set customers up to easily access the information and education they need with scannable QR codes that send patrons directly to the download page for your mobile app. Use your app to guide consumers toward additional resources and products they may need as part of their care experience to ultimately improve their confidence in your offerings.

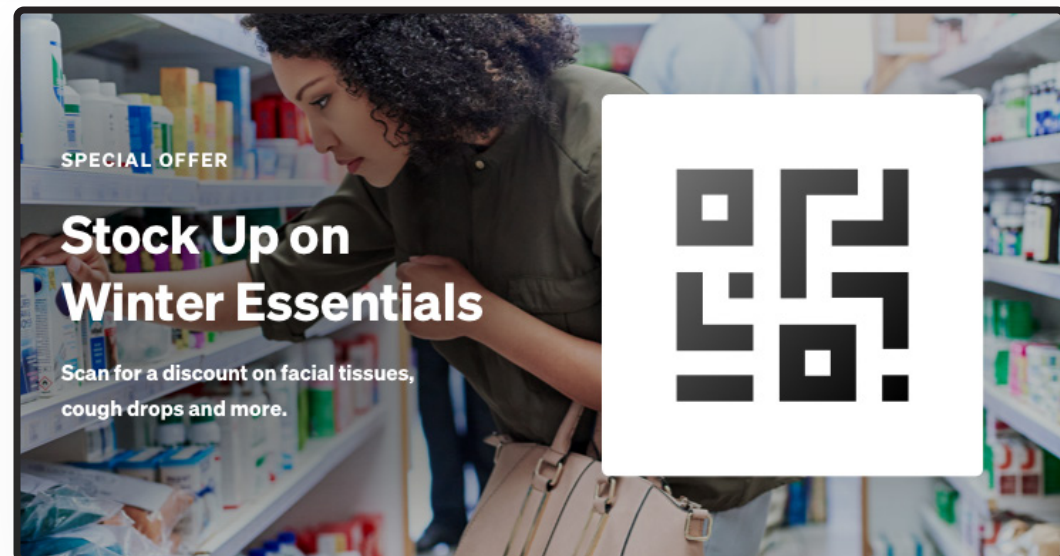


A digital signage graphic with a black background on the left and a white background on the right. The left side features a white cross icon, the text "We Accept Most Insurance Plans", and a list of insurers: "Including BlueCross Blue Shield, Humana Medicaid, Medicare, UnitedHealthcare and many more." Below this is a blue link: "Scan to view more accepted providers". The right side features a large QR code. The background of the right side is a repeating pattern of "INSURANCE CARD" and "INSURANCE CARD" with a cross icon.

**We Accept Most Insurance Plans**

Including BlueCross Blue Shield, Humana Medicaid, Medicare, UnitedHealthcare and many more.

[Scan to view more accepted providers](#)



A digital signage graphic with a background image of a woman in a pharmacy aisle. The text "SPECIAL OFFER" is at the top left. The main text reads "Stock Up on Winter Essentials". Below that is a blue link: "Scan for a discount on facial tissues, cough drops and more." A large QR code is on the right side.

**SPECIAL OFFER**

**Stock Up on Winter Essentials**

[Scan for a discount on facial tissues, cough drops and more.](#)

+

## It's Flu Season

Scan for advice from our healthcare experts  
and schedule your flu shot on our app

Available on the App Store

GET IT ON Google Play

### Share relevant promotions

Similarly, leverage mobile apps, digital screens and other communication tools to share your store's current healthcare promotions, discounts, limited-time-offers and coupons. These promotions not only encourage repeat visits, but also drive positive outcomes when consumers leave the store with products directly tied to improving public health. A sale on masks and hand sanitizer during peak flu season, for example, is a timely and relevant win for consumers and retailers.

### Keep up-to-date on COVID-19

Patients don't see everything you're doing behind-the-scenes to keep them (and your employees) safe, and as a result, might be hesitant to use your services. Use in-store messaging tools to display cleaning protocols, up-to-date cases in your area, tips for staying safe and healthy and advice for consolidating shopping trips to lessen the spread. These messages can position your store as a healthcare expert and help you win over consumer confidence.

Cases Are Actively Rising in our Area

## To keep you safe, all of our employees are required to wear masks and gloves at all times.

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## THE LOWDOWN

## Too Many Customers Who Get Care Leave Empty-Handed

Our study found that **customers are open and willing to spend more** and take advantage of additional healthcare services in stores, but many **retailers admit they don't prioritize their communications to support these initiatives**. Just over a third of customers are guaranteed to leave the store with an after-care purchase — a huge missed upsell opportunity, especially considering consumer openness to additional spending.

**Consumer openness to spend more:** Consumers are open to a variety of retail healthcare services, but currently most rely on retail only for prescriptions. According to our data, **77% of consumers have one or more prescriptions that require regular pharmacy visits for refills**. Of those consumers, **more than half (56%) would consider using retail healthcare for preventive care, primary care and/or physical exams** — a significant opportunity for retailers to increase revenue from existing shoppers and encourage repeat visits.

**Retailers' missed communication opportunities:** Many retail healthcare companies are not using available communication methods to drive action from consumers. Nearly 80% of retail healthcare companies do not use communication methods to encourage repeat visits from customers, and nearly two-thirds are failing to guide customers toward relevant in-store products.

## BUSINESS RESPONDENTS

### Top 3 missed communication opportunities

- |   |                                                                             |     |
|---|-----------------------------------------------------------------------------|-----|
| 1 | To encourage repeat visits (via digital coupons, promotions, rewards, etc.) | 21% |
| 2 | To keep up with competitors                                                 | 27% |
| 3 | To guide customers toward other products in the store                       | 30% |

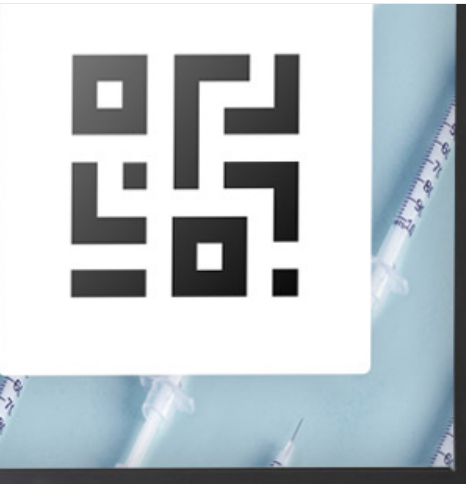




# Welcome Shoppers

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## THE OPPORTUNITY

# Inspiring Consumers to Take Action

Too many patients are bypassing checkout and leaving empty-handed, and too many shoppers are browsing store aisles without knowing all the healthcare options available just steps away. By failing to better inform customers about the healthcare services they provide — and that customers want to use — retailers are fumbling the opportunity to deepen their relationships with those customers. Retailers should maximize their communication technologies to increase share-of-wallet and drive measurable results.

- Encourage repeat visits
- Guide toward other products/services







## Encourage repeat visits

Consumers are motivated by deals: **Between 2015 and 2019, digital coupon use\* among consumers increased by 22%.** And it's fair to assume that rate will only grow since the economic downturn and high unemployment rate have led to tighter household budgets. Use mobile apps and in-store QR codes to give your customers access to digital coupons and rewards aimed at encouraging repeat visits. Rely on data and analytics to provide personalized offers — if a customer typically buys coffee when they refill a prescription, offer them a coupon for a reusable coffee tumbler in your home section. You should aim to continuously evolve the entry and re-entry points of the Care + Commerce Ecosystem.

## Guide toward other products/services

Likewise, set up a system of engaging in-store visuals that not only keeps customers captivated, but also leads them toward additional products and services they'll find useful. For example, use a visual in a retail aisle to remind a customer to refill their prescription, sending them to your store's pharmacy. At the pharmacy, use a display to message additional healthcare services, like physical therapy appointments available to book through your app. This Care + Commerce Ecosystem is critical to making stores a one-stop-shop for healthcare.

\*<https://www.statista.com/topics/1156/coupon-market-trends-in-the-united-states/>

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# Retailers Aren't Nearly as Digital as Consumers Expect

Consumers want more digital experiences, and retail health wants to innovate. But our study shows a misalignment between **consumers' expectations** and retailers' ability to deliver. Further, the data from retailers we surveyed points to a **misperception** around what retailers believe they're providing in stores and what customers are truly experiencing.

**High consumer expectations for digital:** Consumers find digital tools like mobile apps, web portals and virtual waiting rooms infinitely more valuable than paper-based communications. Only **16% of consumers find paper products valuable in retail health interactions**, but **more than half** said the **most common signage and information they encounter is printed on paper**. When it comes to meeting customer expectations for digital experiences, retailers are falling short.



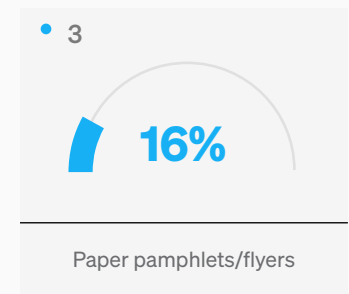
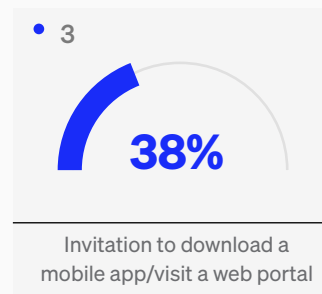
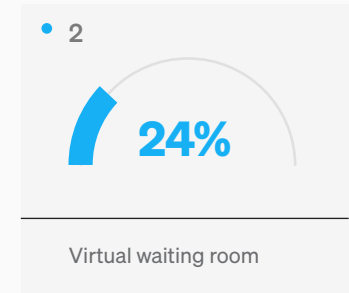
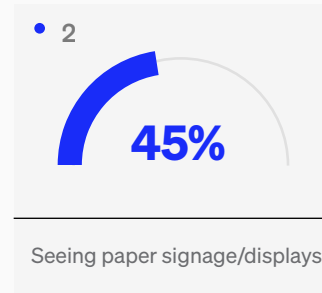
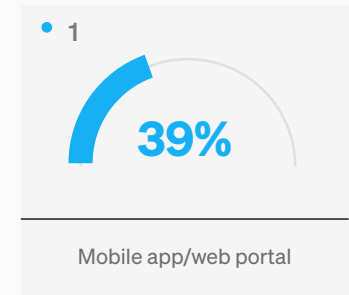
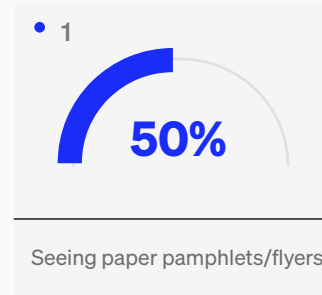
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CONSUMER RESPONDENTS

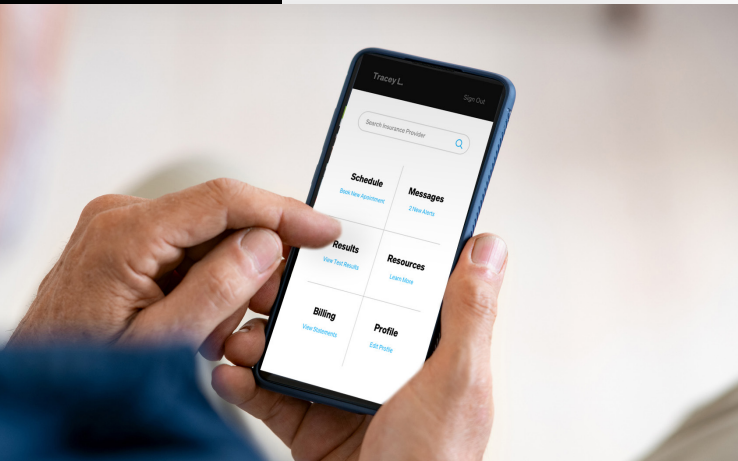
## Misalignment between consumer expectations and reality

Top 3 most **common** interactions

Top 3 most **valuable** interactions







**Retail misunderstandings around digital communication channels:**

When we asked retail healthcare executives which communication methods their companies use most often to interact with consumers, they painted a different picture.

BUSINESS RESPONDENTS

Communication methods used by retail healthcare companies, from most to least common

1	Mobile app and/or web portal	55%
2	Direct mail	14%
3	Virtual waiting room	14%
4	Digital signage/displays	8%
5	Paper pamphlets/flyers	7%
6	Paper signage/displays	1%

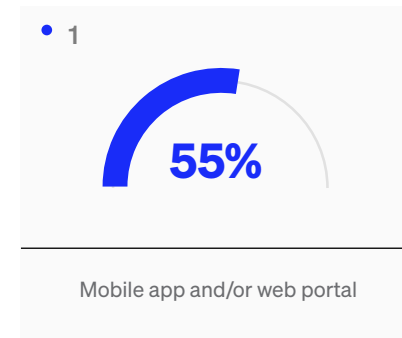


Of particular concern is that **93%** of retail healthcare executives report being satisfied with their mobile app and/or web portal when only **38%** of consumers say they even remember being invited to download a mobile app or visit a web portal when they visited a retail healthcare clinic.

**When compared with consumer responses**, it's clear there's a major disconnect between how retail healthcare companies think they're engaging with customers and what customers are actually experiencing.

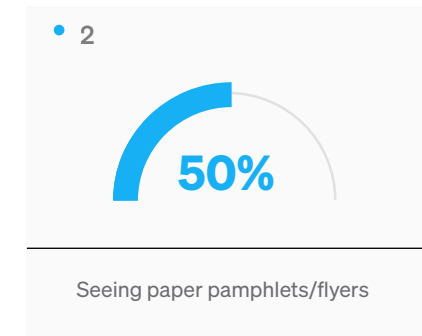
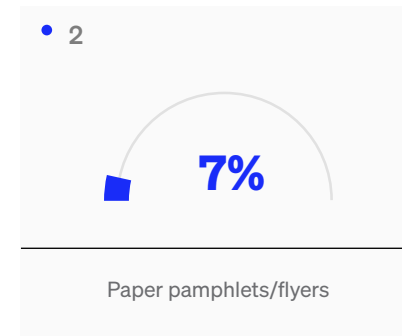
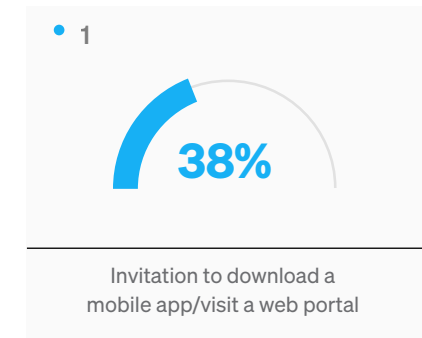
**BUSINESS RESPONDENTS**

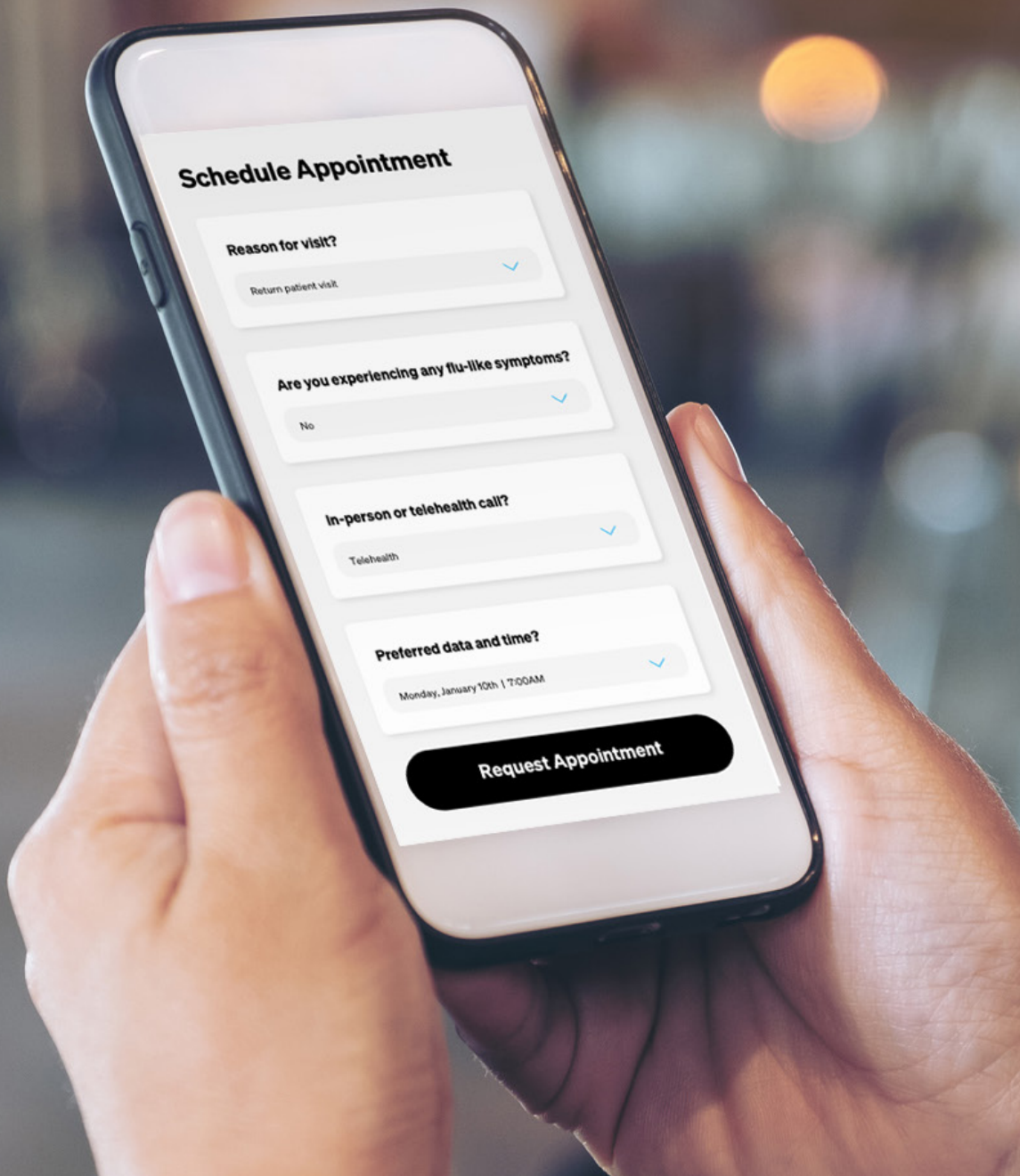
The consumer communication methods retail healthcare executives say their **companies rely on** include:



**CONSUMER RESPONDENTS**

But the communication methods consumers **actually experience** in retail healthcare environments are:





#### THE OPPORTUNITY

## Maximizing Existing Tech and Investing in True Partnership

Consumers overwhelmingly value technology over easy-to-miss paper-based communications, and that should come as no surprise. Digital tools signal to consumers that the health clinic they're visiting is more advanced and up to date. These technologies also provide more value to the consumer, enabling anyone with a phone to scan a QR code and download an app for convenient scheduling and refill ordering. Retail healthcare providers must find ways to maximize their existing tools, invest in more strategic technologies and develop deeper partnerships with vendors to achieve better ROI.

- Increase customer awareness
- Invest in true partnership



## Increase customer awareness

Many consumers may report higher rates of paper-based interactions simply because they're unaware that your retail health clinic offers a mobile app or web portal. Promote these tools through in-venue digital signage at locations like the pharmacy counter, checkout and in the aisles. By bridging the gap between shopping and care, customers are seamlessly ushered into the digital [Care + Commerce Ecosystem](#).

## Invest in true partnership

When customers' needs change suddenly — as they have with COVID-19 — many retailers default to buying the latest trendy tech to address them. This often results in solutions that are much more complicated than the original problem. Work with technology vendors that don't only try to sell you on their product, but rather partner with you long term to help your organization align on strategic goals and uncover ideas for continuous improvement and innovation.



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## THE LOWDOWN

## Retail's Convenience Factor Is Changing Consumers' Healthcare Preferences

For many consumers, the COVID-19 pandemic was the impetus to **rely on retail health more frequently** — or even use it for the first time — as they sought to avoid overcrowded doctors' offices and consolidate their trips. But while the pandemic will be temporary, our data shows **these behavioral changes will not be**.

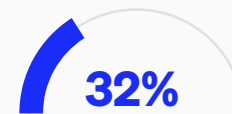
**Increased retail health usage during the pandemic:** The majority (**74%**) of retail healthcare executives **reported the COVID-19 pandemic has increased the volume and/or revenue of their healthcare offerings**. And **60%** said the pandemic has increased customers' spend per visit. The consumer insights matched what retailers reported: **Almost one-third (32%)** said COVID-19 increased their usage of retail health clinics. As quarantined consumers venture out less, they're checking off more to-dos — from healthcare visits to shopping for essentials — all in one go.

**Lasting consumer behavioral changes:** What's more, consumers are permanently altering their behavior because of the convenience they experienced visiting retail health clinics during the pandemic. **Almost half of consumers (49%)** say that in the future/after the pandemic ends, they'll be **more likely** to use retail health clinics than standalone facilities for non-urgent health needs. Of those respondents, **70%** say they'll be **more likely to use retail health clinics due to convenience** and the ability to consolidate their trips.

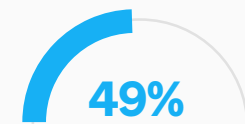
## CONSUMER RESPONDENTS

### Permanent shifts in consumer behavior

Consumers who increased their usage of retail health clinics **during the pandemic**



Consumers who are now more likely to use retail health clinics **after the pandemic ends**







#### THE OPPORTUNITY

## Seizing the Moment

How retail health providers react now will help define a new patient experience for many consumers. With COVID-19 bringing in more new customers, now is the time to impress these new customers with superior care and a seamless experience. By acting now, one-time customers who come in for a COVID-19 test or treatment can be converted, with your location becoming their first choice for their care and comfort.

- 
- **Improve the customer wait experience**
  - **Act on customer data and feedback**



## Improve the customer wait experience

Every second a customer spends in a waiting room is a chance to disseminate your messages and make real connections. Yet, most respondents who visited retail health during the pandemic have found their wait experience forgettable. Just **23% of patients indicated their wait experience influenced their decision to want to come back**. Retailers that use digital signage for entertainment, action or waypathing can keep patients amused by a show, game or just using the time to shop, making the experience feel less like wasted time. As it stands, the **waiting room experience has little impact on 77% of customers — but with improvements, it can help influence customers to return.**

## Act on customer data and feedback

Solicit feedback from your customers with scannable QR codes that take them directly to surveys to share their thoughts, but don't let the results live in a vacuum. First, make sure this feedback is cross-referenced with feedback across the operation. For example, pharmacies should see if customer feedback within the store tracks with what customers within the clinic are experiencing. Acting on this information ensures you're meeting customer needs — or that you know what has to change to do so. This is critically important during the pandemic. As more new customers come in for care, actionably addressing feedback and concerns shows patients their experiences are taken seriously.





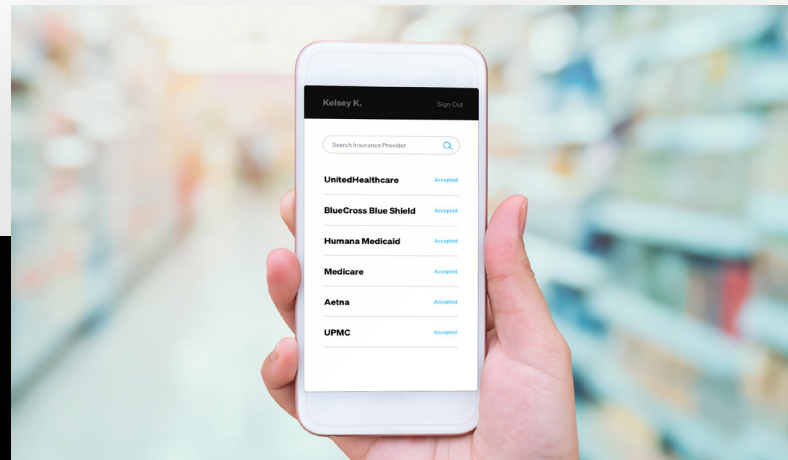
## Conclusion

Consumers are fickle, but their motivations are not. **Today's consumers are increasingly motivated by convenience, trust and experience.** They want quick, consolidated access to high-quality products and services in an environment that minimizes stress while keeping them engaged, informed and entertained.

Our survey revealed that while retailers are set up to accommodate shifting consumer demands and behaviors, they have work to do when it comes to amplifying in-store environments, inspiring consumers to take action, maximizing digital tools and adapting rapidly when presented with

new opportunities. The more retailers can do to improve customer trust, engagement and wait experience, the better positioned they'll be to meet shifting consumer needs and capture a larger share of wallet.

All services in our lives are consolidating. Amazon doesn't just deliver to our door, it makes our homes smarter and powers many of our favorite websites. Retail healthcare can seize this trend by redefining their locations as a one-stop destination for health and wellness. **By making changes and improving digital communication, your retail customers continue to return over and over as retail health advocates.**



## Survey Demographics

To better understand the current state and future of retail healthcare, we surveyed 500 consumers and 250 retail healthcare executives across the U.S.

### 500 Consumer Respondents

Age		Region		Locale	
53	Gen Z	100	Northwest	186	City
196	Millennial	100	Southwest	239	Suburb/town
153	Gen X	100	Midwest	75	Rural
95	Baby boomer	100	Northeast		
3	Silent generation	100	Southeast		

### 250 Business Respondents

Job Level		Company revenue		Region		Locale	
105	Director	127	\$5M – \$500M	50	Northwest	145	City
34	Vice President	67	\$500M – \$999M	50	Southwest	90	Suburb/town
29	Senior Vice President	56	More than \$1B	50	Midwest	15	Rural
82	C-Suite			50	Northeast		
				50	Southeast		



UPshow is the customizable engagement platform that capitalizes on a business' existing screens to deliver better audience experiences. UPshow's technology seamlessly connects TV screens and mobile devices, creating a revolutionary in-venue network that drives customer and employee behaviors. Enterprise businesses in the hospitality, entertainment, fitness and healthcare industries rely on UPshow's plug-and-play technology to create deeper brand engagement and maximize profitability and efficiency. Founded in 2015, UPshow now reaches audiences through more than 25,000 screens in businesses around the world. Learn more at [upshow.tv](https://upshow.tv).

Contact Us