

CATEGORY INSIGHTS | 2025-2026

Hospital Network & Healthcare Media Trends

National & Philadelphia DMA | Spending · Mix · Category Intelligence

Excludes Pharmaceutical Advertising

NATIONAL SNAPSHOT: HOSPITAL & HEALTHCARE ADVERTISING

\$34.3B

U.S. Healthcare Ad Market

Projected by 2033 (from \$24.4B in 2024)

+13.3%

Digital Ad Spend Growth

Healthcare digital spend hits \$24.77B in 2025 YoY

88%

Marketers Increasing Digital

Plan to increase digital ad spend in 2026

\$286

Avg. Cost Per Healthcare Lead

Rising as digital competition intensifies

NATIONAL TRENDS: WHAT'S RESHAPING HOSPITAL MARKETING

Digital Surpasses Linear TV

Social media ad spend is projected to jump +18.1% to ~\$6B, overtaking linear TV for the first time in healthcare. Linear TV share drops from 30% in 2021 to a projected 12% by 2027.

CTV/OTT Accelerates

Local healthcare CTV spend grows from \$287M (2024) to \$353M by 2026 — a 10.9% CAGR. 88% of adults who regularly see a doctor are CTV viewers.

AI-Powered Personalization

69% of healthcare marketers rank generative AI as their #1 critical tech trend. AI enables predictive patient journeys, dynamic ad targeting, and real-time budget reallocation.

Search Dominates Patient Acquisition

Search drives 3x more visitors to hospital sites vs. non-search. Hospitals dedicate 85% of marketing budgets to Google Ads. Patients booking appointments run 3x more searches.

Hospital Ads Drive Utilization

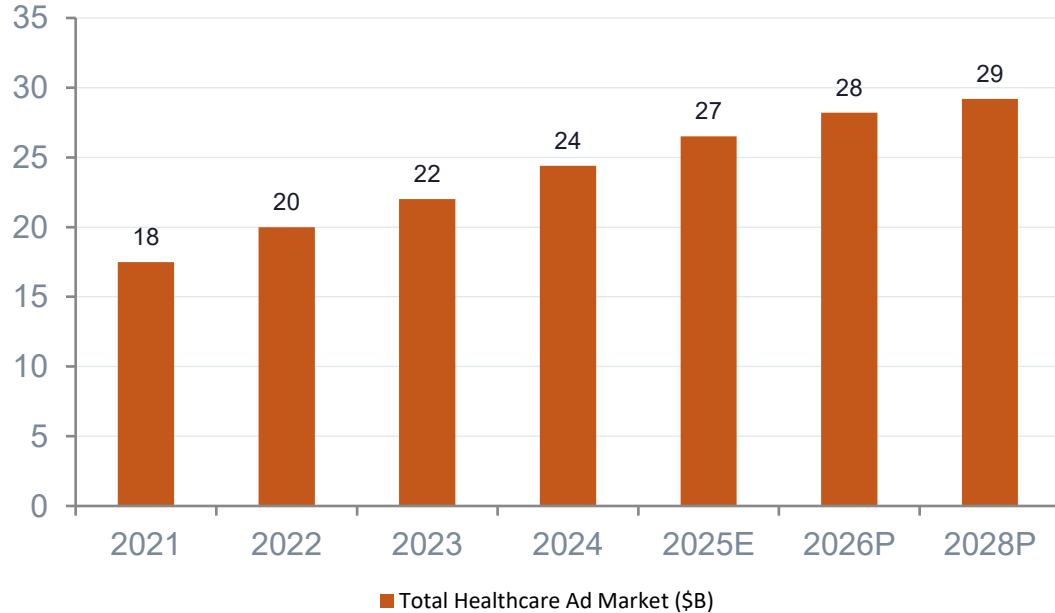
New 2026 research (Penn LDI): A 10% increase in hospital ad impressions drives +9 hospital admissions per 100K Medicare beneficiaries — worth ~\$3.3M in spending per market.

Privacy-First Targeting

Post-cookie, hospitals lean into HIPAA-compliant first-party data. Google's hybrid cookie model keeps third-party data alive, but consent-based strategies are non-negotiable.

TOPLINE SPENDING: U.S. HOSPITAL & HEALTHCARE ADVERTISING

U.S. Healthcare Ad Market Size (\$B)



\$24.4B

2024 U.S. healthcare ad market (IMARC Group)

3.8%

CAGR through 2033 — growing to \$34.3B

+11.5%

Healthcare ad spending surged in 2022; momentum sustained

\$7.2M

Avg. hospital/healthcare marketer budget in 2024 (down from \$9.1M in 2023)

1–2%

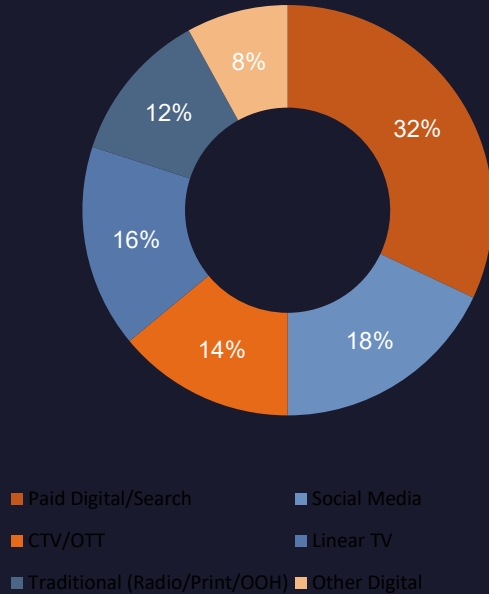
Typical hospital marketing spend as % of total revenue — room to grow

#2

Hospitals are the 2nd largest DTC healthcare advertiser after pharma

HOSPITAL NETWORK MEDIA MIX: THE DIGITAL PIVOT

Estimated 2025 Hospital Ad Spend Mix



THE SHIFT IN CHANNEL ALLOCATION

▼ Linear TV 30% (2021)

12% by 2027

▲ Social Media (exp.)

Surpasses Linear TV 2025

▲ CTV/OTT Local

\$353M by 2026 (+10.9% CAGR)

→ Google/Search

85% of hospital digital \$

▲ DOOH

Emerging: pharma → hospital

TOP 10 HOSPITAL NETWORK ADVERTISERS — NATIONAL

01

HCA Healthcare

Nashville, TN · 220 hospitals · \$75.6B revenue (2025)

Largest for-profit system; heavy national digital & TV

02

Kaiser Permanente

Oakland, CA · 40 hospitals · \$127.7B revenue

Integrated model; brand + member acquisition focus

03

CommonSpirit Health

Chicago, IL · 140+ hospitals · 21 states

Faith-based; community health campaigns

04

Advocate Health (Atrium+Advocate)

Charlotte, NC · \$31B+ revenue · major Midwest/SE

Post-merger; rebranding & awareness campaigns

05

Mayo Clinic

Rochester, MN · \$21.5B revenue (2025)

Premium brand; national authority positioning

06

Cleveland Clinic

Cleveland, OH · \$18.3B revenue · global reach

Specialty + cardiac; significant OOH & digital

07

NYU Langone Health

New York, NY · Multi-hospital, NYC metro

Aggressive NY market TV/OOH; 'We put you first'

08

Northwell Health

New Hyde Park, NY · 28 hospitals · \$19B+ revenue

NYC DMA leader; 'Extraordinary Healer' campaigns

09

Mass General Brigham

Boston, MA · Academic medical center system

National brand equity; research-forward messaging

10

University of Pennsylvania Health (Penn Medicine)

Philadelphia, PA · 6 hospitals · \$8B+ revenue

Philly DMA leader; service-line digital campaigns

PHILADELPHIA DMA: HEALTHCARE MARKET SPOTLIGHT

The Philadelphia DMA is one of the most competitive hospital advertising markets in the U.S. — anchored by major academic medical centers, large regional systems, and nationally ranked specialty programs — all competing for the same local patient population.

Penn Medicine (HUP)

#1 PA · #2 Philadelphia

\$8B+ revenue · 6 hospitals

Academic leader; recently left U.S. News rankings

Jefferson Health

#3 PA · 33 hospitals

\$7.3B revenue · Merged w/ Lehigh Valley

Largest # of hospitals in region; heavy brand investment

CHOP

3rd Best Children's Hospital, U.S.

\$3.35B revenue

Pediatric authority; strong digital & community outreach

Temple University Health

Safety-net system

Improving margins 2024

Urban core; acquired Fox Chase Cancer Center from Temple

Main Line Health

Affluent suburban market

\$1.78B revenue · improving

Suburban patient acquisition; competitive with Penn & Jefferson

Tower Health

Multi-county W. PA region

\$27M operating loss improvement

Recovering system; reputation/trust marketing priority

PHILADELPHIA DMA: LOCAL HEALTHCARE MEDIA TRENDS

MARKET DYNAMICS

- ▶ Tri-state DMA (PA/NJ/DE) — one of the most densely competitive hospital markets in the nation
- ▶ Jefferson Health's merger with Lehigh Valley nearly doubles its footprint to ~30 hospitals, intensifying competition across the region
- ▶ Penn Medicine's exit from U.S. News rankings signals a pivot toward quality-of-experience messaging over rankings
- ▶ CHOP and Penn both drive premium brand advertising given their academic/research authority positioning
- ▶ Increasing cross-DMA competition: Philadelphia systems now advertising in South Jersey and Delaware media markets
- ▶ Strong use of OOH/transit advertising given density of SEPTA, I-95 corridor, and suburban commuter corridors

PHILLY DMA MEDIA OPPORTUNITIES

Local CTV/OTT

Streaming is #1 growth channel — Philly market includes strong NBC, ABC, CBS local streaming inventory

Broadcast TV

6ABC (WPVI) & NBC10 lead local news trust — 27% trust local TV for health info

Digital/Search

Google dominates patient acquisition; Philly patients research hospitals on mobile extensively

OOH / Transit

SEPTA, PATCO, and highway corridors create high-frequency health brand touchpoints

Programmatic Display

Geo-fenced hospital competitor audiences, ZIP-level targeting around health corridors

Social / Video

Short-form video and Facebook/Instagram key for 35–65 patient acquisition demographic

EMERGING TRENDS TO WATCH: 2025–2026

01 Online Scheduling as Marketing Differentiator

80% of patients use online appointment scheduling; 55% would switch providers for this capability. Health systems that market digital access are winning new patients.

Healthgrades 2025

02 Video & Influencer Content

89% of consumers want more video from brands. Patient testimonial campaigns, short-form medical education, and HCP influencer content are driving engagement and trust.

Healthgrades / NoGood 2026

03 Medicaid Policy Pressure & Uncompensated Care

Trump's 'One Big Beautiful Bill' (July 2025) estimates \$1T in Medicaid cuts over 10 years. Rural and safety-net hospitals are reallocating marketing to emphasize access and community.

Healthgrades 2026

04 Trust Crisis — Reputation Marketing Surges

Only 40% of U.S. adults report high trust in hospitals in 2024 (down from 70%+ in 2020). Systems are investing heavily in brand trust, online reviews, and transparency campaigns.

Healthgrades 2025

05 DOOH + CTV Cross-Channel Integration

Digital OOH in high-attention environments (pharmacies, transit, hospitals) paired with CTV retargeting creates an omnichannel patient journey. Emerging for health systems in top DMAs.

Inmar / CMI Media 2025

06 AI-Powered Budget Optimization

Hospitals deploying AI dashboards that adjust spend in real time across channels based on patient demand signals, appointment capacity, and geographic need.

Healthcare Marketing Vault 2025

KEY TAKEAWAYS

Hospital Network & Healthcare Media

- 💰 The U.S. hospital advertising market is on a firm growth trajectory — from \$24.4B in 2024 toward \$34.3B by 2033, driven by digital and CTV investment.
- 📺 Digital has overtaken linear TV as the primary media channel — social media is now on pace to surpass linear TV spend for the first time in 2025.
- 📺 CTV/OTT is the fastest-growing format for hospital advertisers — local healthcare CTV spend projected to reach \$353M by 2026.
- 🏢 Philadelphia is one of the nation's most competitive hospital advertising DMAs, with Jefferson, Penn Medicine, CHOP, and Main Line all actively competing for patients.
- 🗣️ AI-driven personalization, first-party data strategies, and omnichannel orchestration are now table stakes for health systems of any size.
- 👂 Trust is the core currency — with hospital trust at historic lows (40% in 2024), reputation marketing and patient-centric video content are must-haves.