

2022

# Healthcare & Pharma Industry Assessment

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NBCUniversal



# Welcome!



## Introduction

Explore NBCUniversal's latest perspectives and insights into the Healthcare & Pharma industry. This report provides an overview of recent marketplace dynamics, our prediction of key future trends impacting the industry, and strategic recommendations for Healthcare & Pharma brands and marketers as they navigate what's next.



## Our Approach

At NBCUniversal, we have a legacy of working with a diverse range of Healthcare & Pharma partners to build their brands. This report has been created based on NBCU's:

- Ongoing Industry Evaluation
- Conversations with Healthcare & Pharma Advertisers and Agencies
- Continual Marketplace Analysis
- Examination of Consumer Attitudes towards the Healthcare & Pharma Industry

# NBCUniversal Has a Unique Perspective

## Healthcare & Pharma Industry Advertisers

 Pharma DTC	 Pharma OTC	 Medical Devices	 Healthcare Providers	
 Digital On-Demand Health Services	 Concierge Medical Services	 Online / Digital Pharmacies	 Health Insurance	 Digital Wellness Tools



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# 2022 Landscape

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*Overview of Key Healthcare & Pharma Marketplace Dynamics*



For Healthcare & Pharma, 2022 was the

# Breakthrough Year of the Patient & Customer

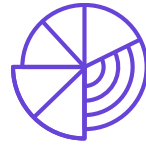


# The Healthcare & Pharma Industries Continued to Modernize and Become More Human



## The Power of Consumer Perception was Realized

While the industry experienced historical high consumer approvals of 50-60% consumer approval vs. 32% pre-pandemic,<sup>1</sup> sentiment is stabilizing.<sup>2</sup>



## Brands Adopted a People-First Approach to Media

Brands explored new ways to engage and new audiences to connect with. Marketing and media efforts were more in line with consumer behavior, e.g., podcasts, streaming, and tapping into celebrities as spokespeople.



## Influencers Gave Mental Health a Stage

By using their massive platforms to share their stories, celebrities and creators normalized talking about and dealing with mental health struggles. Their example opened a window for healthcare and pharma brands, including celeb-run foundations, for louder communication on how to help.



## Expectations from Other Industries Came to Healthcare

Just as we've come to expect choice and convenience with every interaction across countless industries, people want that same choice, connectivity, and ease-of-use when it comes to healthcare. 73% of people say one extraordinary experience raises their expectations of other companies.<sup>4</sup>

# HEALTHCARE & PHARMA SUB-CATEGORIES ARE **Evolving (with People at the Core) to Move the Industry Forward**

## Online / Digital Pharmacies

Consumers are increasingly turning to online pharmacies to **save time and money**.<sup>1</sup> In 1Q, **Mark Cuban launched Cost Plus Drugs** with the promise of “[doing] whatever it takes to get affordable” medications to patients.<sup>2</sup>

### 84%

Of adults who take long-term medications save money each time they fill through an online pharmacy<sup>1</sup>

## Healthcare Providers

From uncovering insights to **closing the healthcare gap** to successfully integrating **virtual and in-person** healthcare, data and technology continue to help create better patient experiences.

### 39%

Of U.S. adults want personalization that demonstrates deeper understanding of the individual<sup>3</sup>

## Digital On-Demand Health Services

Digital services are taking notice of the peaking healthcare conversation and are **stepping up their services**, offering **easier access** to wellness and mental healthcare.

### 32%

Of Gen Z report they don't have time or flexibility in their schedules to fit in an appointment<sup>4</sup>

## Concierge Medical Services

Concierge services continue to be enticing to physicians and consumers alike as they are **centered on relationships with patients**. Technology continues to be a key driver of its growth.<sup>5</sup>

### \$10B

The expected value of the U.S. concierge medical market by 2028 (+9.4% CAGR)<sup>6</sup>

## Health Insurance

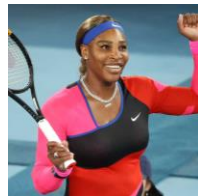
Insurers are **revamping the medical plan structures** to be more inclusive and affordable, recognizing the importance of individual needs and priorities, and increasing importance of accessing behavioral health services.

### 30%

Of insurers are reviewing their medical networks to ensure diversity of providers<sup>7</sup>

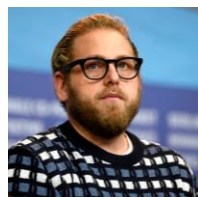


# Having Honest Conversations About Mental Health is No Longer Taboo



## Serena Williams Shares Her "Serious Boundaries"

in a conversation with Selena Gomez on mental health



## Jonah Hill Says He Won't Promote Upcoming Films

in order to prioritize his mental health



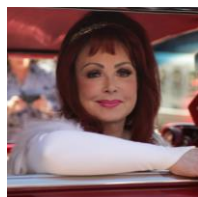
## Remi Bader Seeks Treatment For Eating Disorder,

sharing the personal news with her followers on TikTok



## David Montgomery Opens Up About His Bout With Depression,

as people often overlook mental health struggles among athletes



## Naomi Judd's Daughters Reframe Her Cause of Death:

"We lost our beautiful mother to the disease of mental illness"



# Key Healthcare & Pharma Headlines from 2022

## DRUG APPROVAL

### **Alzheimer's drug**

*approved despite doubts about effectiveness*

Science

## GOVERNMENT

### **Landmark U.S. healthcare bill**

*sets stage for lower Medicare prescription drug costs*

 REUTERS

## MENTAL HEALTH

*Bipartisan gun [control] deal supports  
**'major investments' for behavioral  
health, telehealth programs***

 FIERCE  
Healthcare

## DE&I

*Sanofi launches first-in-pharma  
**Diversity, Equity & Inclusion Board***

 sanofi

# Healthcare & Pharma Forward-Looking Trends

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*Key Trends We Expect to Influence Healthcare & Pharma  
Marketing & Media Strategies*



LOOKING AHEAD,  
**Key Healthcare &  
Pharma Trends  
We Expect to  
Influence Marketing  
& Media Strategies**



New Entrants Navigate a  
**Crowded Market**



Healthcare Opto into  
**Web3 and the Metaverse**



Continued Pursuit of  
**Healthcare Access for All**



A Plethora of  
**Personal Data**



**Social Determinants of Health**  
Become an Investment Target

There are more new drugs...

## New Entrants Navigate a Crowded Market

An increased number of new players are expected to enter the field with blockbuster launches

The industry will need to make room for new launchers moving forward. These smaller companies have decided to go it alone without the support of larger organizations.

While industry giants simply outspend the competition when it comes to media, newcomers turn to innovative media and marketing approaches to get noticed.

We expect the industry to **take note of new entrants' tactics** and follow in their innovative footsteps.

Sources: 1. [McKinsey First-Time Launchers](#); 2. [FDA](#)



Between 2020 and September 2022, **the FDA approved 124 new drugs<sup>2</sup>**

And new companies competing for share



**22 of the 39 blockbuster drug launches** due to take place between 2021-2025 **are expected to come from first-time launchers,**

A whopping 56% vs. just 20% between 2016-2020<sup>1</sup>

# Healthcare Opts into Web3 and the Metaverse

Tapping new realities and technology to expand and improve care

Advancements in technology through web3 and the Metaverse will play a vital role in reshaping the current healthcare system.

**81% of healthcare executives** believe it will have a positive impact on their organizations.<sup>1</sup>

We expect the industry will wade deeper into digital and virtual worlds, **encouraging providers and patients alike to explore new, innovative care solutions that alleviate pain points**, from costs to limited access.

Sources: 1. [Accenture](#); 2. [Digital Health](#); 3. [Forbes](#); 4. [Healthcare Finance News](#)

## Patients

VR / AR

Offers Patients

**Immediate Feedback and Education from Providers** with Tech like the Hololens<sup>2</sup>



BLOCKCHAIN

Gives Patients

**Ownership of their Medical Records<sup>3</sup>**



## Providers

DIGITAL TWINS

Make Health Predictions via

**Simulations Using Real-World Data<sup>3</sup>**



VIRTUAL PHARMACIES

Sell Goods &

**Healthcare in the Metaverse<sup>4</sup>**





# Continued Pursuit of Healthcare Access for All

Major moves from the industry will get us closer to much-needed accessibility

**80% of US adults** are at least moderately concerned about getting access to quality health care when they need it.<sup>1</sup>

With their worries top of mind, accessibility to healthcare is starting to proliferate in the US, primarily due to digitalization.

As widespread access to healthcare becomes a priority among the industry and beyond, we expect **patients to develop trust among companies that are diversifying** in order to make care more seamless, convenient, and sometimes even fun.

Sources: 1. *Associated Press*; 2. *Fierce Healthcare*; 3. *eMarketer*; 4. *Fierce Biotech*



## Retailers Expand Healthcare Capabilities to Consumers

by acquiring and partnering with specialized startups

EXAMPLE:

### Walmart Health Virtual Care

brings its retail clinics and telehealth under one roof<sup>2</sup>



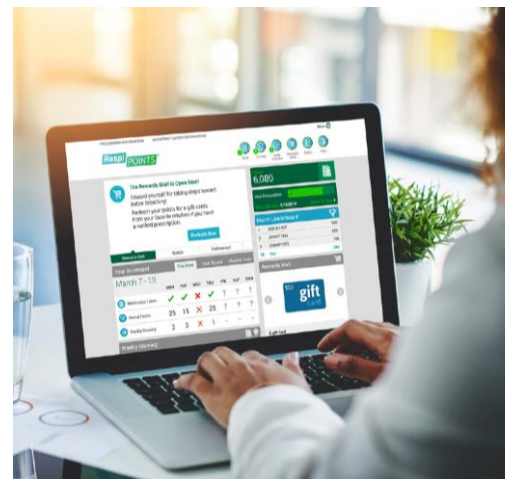
## New Tech Makes At-Home and Mobile Care Possible

Eliminating cases for poor communication and slower care

EXAMPLE:

### Get Luna

offers virtual and in-home physical therapy, aiming to reduce post-acute care costs by 55% to 70%<sup>3</sup>



## Brands Humanize Healthcare through Gamification

getting patients to invest more in their care

EXAMPLE:

### Healthprize's Respipoints

program showed COPD patient participants had 44% greater medication adherence<sup>4</sup>

# A Plethora of Personal Data

## Re-evaluating ad strategies to foster more authentic patient and customer connections

As consumers share more personal information than ever and the industry continues to consolidate, healthcare and pharma brands have access to an abundance of personal data.

In preparing for a cookie-less future, brands are starting to leverage this first-party data to connect with consumers.<sup>1</sup>

However, the industry has been met with increased scrutiny and concern over privacy. 67% of consumers are “**more vigilant than ever about their online data and privacy.**”<sup>2</sup>

We expect brands to **humanize and contextualize their data strategy**, putting consumers’ minds at ease.

Sources: 1. [eMarketer](#); 2. [WARC](#); 3. [NY Times](#); 4. [Mozilla](#); 5. [Fast Company](#); 6. [Fierce Pharma](#)



Following the repeal of Roe v. Wade, Google announced it would **delete location data when users visit abortion clinics**<sup>3</sup>



Mozilla investigated and labeled 18 of 25 popular reproductive health apps and wearable devices with a **\*Privacy Not Included warning**<sup>4</sup>

moz://a



Amid mounting layoffs at tech firms, **biotechs and pharmaceutical companies** are hiring employees **with AI and data science experience**<sup>5</sup>

FASTCOMPANY



The California Privacy Rights Act (CPRA) will go into effect on January 1, 2023 and **strengthen regulations around digital advertising and data targeting**<sup>6</sup>



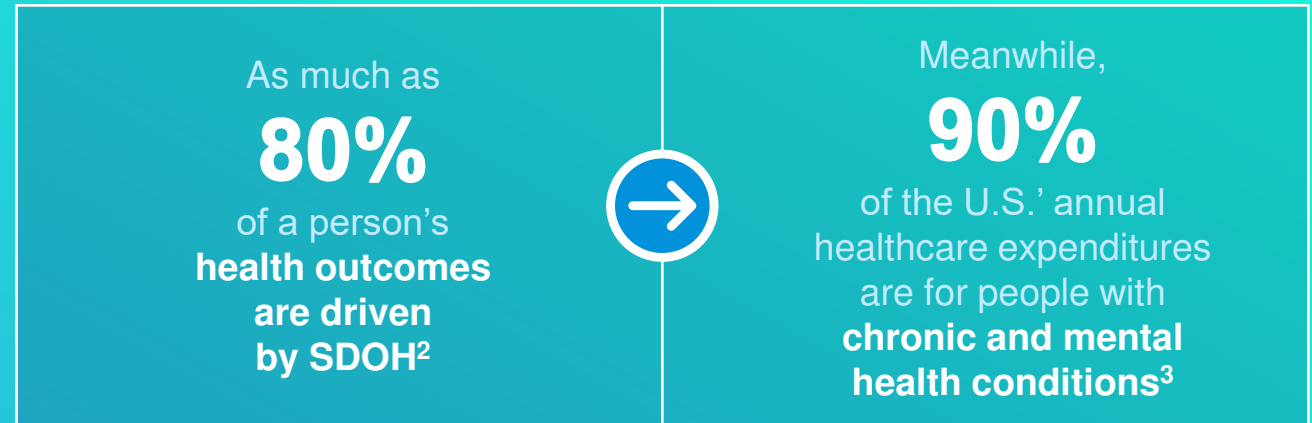
# Social Determinants of Health Become an Investment Target

## Making strides toward a more equitable healthcare system

Social determinants of health (SDOH) are the environmental conditions that affect a person's health, functioning, and quality of life.<sup>1</sup>

While SDOH are not a new concept, the pandemic highlighted the existing environmental and health disparities between communities.

We expect healthcare companies, retailers, insurance companies, and more to **invest heavily in SDOH projects to reduce health costs and improve quality of life for many.**



### EXAMPLES



**UnitedHealth Group** invested an additional \$100M in **affordable housing initiatives**<sup>4</sup>



**Medi-Cal**, California's Medicaid program, began delivering **medically-tailored meals** to members<sup>5</sup>



**CVS Health and Uber Health** partnered to provide people in underserved communities with **free rides to medical care, work, or education**<sup>6</sup>

Sources: 1. U.S. Department of Health and Human Services; 2. eMarketer; 3. CDC; 4. Fierce Healthcare; 5. Fierce Healthcare; 6. CVS



LOOKING AHEAD,  
**Key Healthcare &  
Pharma Trends  
We Expect to  
Influence Marketing  
& Media Strategies**



### **New Entrants Navigate a Crowded Market**

An increased number of new players are expected to enter the field with blockbuster launches



### **Healthcare Opts into Web3 and the Metaverse**

Tapping new realities and technology to expand and improve care



### **Continued Pursuit of Healthcare Access for All**

Major moves from the industry will get us closer to much-needed accessibility



### **A Plethora of Personal Data**

Re-evaluating ad strategies to foster more authentic patient and customer connections



### **Social Determinants of Health Become an Investment Target**

Making strides toward a more equitable healthcare system

# NBCU Healthcare & Pharma Strategic Considerations

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*Key Considerations for Driving Growth for Healthcare & Pharma Brands*



## 01. Lead with Creativity & Innovation

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Engage audiences through *people-first, innovative* storytelling that reflects who you are as a brand and authentically tells stories

## 02. Create Relevance through Culture

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Make an impression with your audience by creating connections with relevant cultural moments - leveraging interests/passion points, and identifying pertinent influencers

## 03. Turbocharge Your Video Approach with Data

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Connect your audience across streaming and linear with messaging that guides them through their path to script or decision. Leverage data to capture learnings for media and creative

## 04. Build Strong Connections with Multicultural Communities

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Create and maintain connections with key audiences, such as Hispanics, by leading with culture through content and media

## 05. Share Your Pro-Social Story

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Educate and authentically demonstrate your brand's commitment to an issue or movement that matters, such as supporting caregivers or investments in DE&I, through high-impact storytelling approaches



## 01. Lead with Creativity & Innovation

**Why:** Stand out from the competition and meet consumers' raised expectations by developing out-of-the-box creative that establishes stronger relationships with your audience.

**Good For:** Awareness | Consideration | Education | Brand Perception | Action | Purchase Intent

## 02. Create Relevance through Culture

**Why:** Creating relevance can help healthcare and pharma brands solidify their identity, differentiate, and build trust amongst people. Aligning with cultural happenings and trends is also a way to break down stereotypes.

**Good For:** Awareness | Brand/ Ad Recall | Consideration | Perception

## 03. Turbocharge Your Video Approach with Data

**Why:** Leveraging combined data sources helps identify new audiences, facilitate timely learnings and optimizations, and allows for tailored messaging.

**Good For:** Targeted Reach | Incremental Reach | Ad Recall | Behavioral KPIs | Conversion

## 04. Build Strong Connections with Multicultural Communities

**Why:** Multicultural consumers have a renewed focus on their health and are receptive to health messaging. Bringing attention to and educating these communities is imperative to building trust.

**Good For:** Awareness | Sentiment | Consideration | Purchase Intent | Loyalty

## 05. Share Your Pro-Social Story

**Why:** With consumer approval at pre-pandemic levels, healthcare and pharma brands need to give the public something to believe in. Brand commitments need to be clear, as the communities they serve are calling for accountability & progress.

**Good For:** Brand Perception | Consideration | Loyalty | Brand Recall



01.

# Lead with Creativity & Innovation

Dig deeper into the healthcare and pharma industries through breakthrough storytelling & actionable solutions



*I truly believe  
we cannot solve  
the biggest problems  
without creativity.*

*But I don't think they  
have to be complicated.  
It's sometimes the simplest idea  
that is the best.... Let's have the  
courage to take that first step.*

– Patricia Corsi, CMO @ Bayer



## Build Brand and Identity

through Content and Technology

From timely long-form stories (e.g., documentary film), to AR tech encouraging viewers to engage with your brand from home, we're leveraging premium environments to authentically promote your brand and identity.

### Recommended Solutions:

AR/VR Enhancement | Health Matters | Docu-Style Originals | Influencers



## Establish Connections

via Impactful IP and Storytelling

Create and maintain connections with people through groundbreaking creative that is aligned to your messaging and audience's interests.

### Recommended Solutions:

Caregivers | Real People Stories | Infotainment Content Series | Content Integration | Contextual Alignment



## Drive Action

with Engaging Ad Innovations

Tap into leading commercial innovation, designed with the viewer in mind, prioritizing the consumer experience, while maximizing full-funnel impact for partners.

### Recommended Solutions:

Sequential Storytelling | Quest TV Network | Ad Innovations | Actionable Units

02.

# Create Relevance Through Culture

Creating relevance can help healthcare and pharma brands solidify their identity, differentiate, and build trust amongst people



## Cultural Moments and Events

Align with relevant cultural moments that can help achieve your goals such as Cultural Heritage & DEI Celebrations, Premier Sports Events, and Holidays

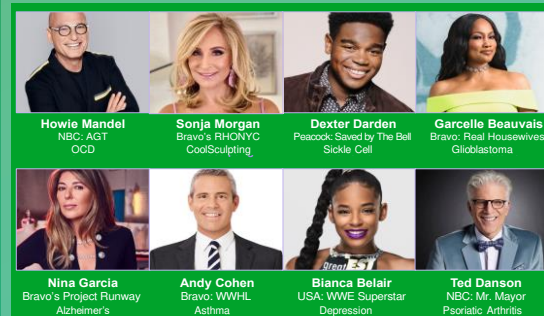
# 1 in 3

Americans said they see pharma brands more like lifestyle brands, citing Nike<sup>1</sup>



## Premium Content

Meet your audience in their interests and passions, (e.g., late-night talk, daytime, reality tv) through integrations and sponsorships that seamlessly connect the brand with the program



## Influencers

Tap into influencers across entertainment, sports, and news who personally identify with a condition or a situation relevant to your audience

Images are for illustrative purposes only.

Source: 1. [M Booth Health](#)

### 03. Turbocharge Your Video Approach with Data

Leverage your data and our data across *digital and linear* to meet audiences with messaging relevant to their needs and journey phase



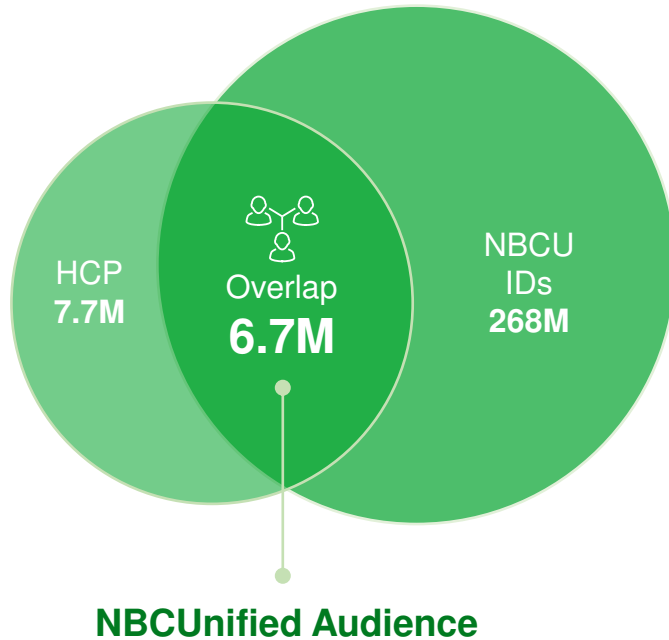
### 03.

# Turbocharge Your Video Approach with Data

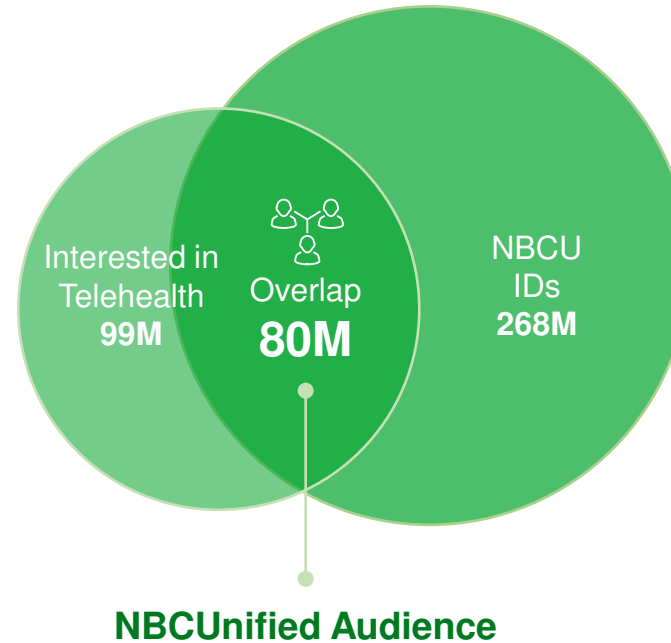
NBCUnified allows us to build a wide range of data audiences, and brands to combine their data with ours

## EXAMPLES Healthcare & Pharma

### Healthcare Professionals



### Interested in Telehealth





04.

# Build Strong Connections with Multicultural Communities

Best practices for maintaining and creating connections with key growth audiences, such as Hispanics

## Understanding & Connecting with Culture



- Consumers lean into brands and storytellers who **understand the nuances of their culture** - what makes each culture distinct and the common threads between cultures
- Consumers want brands to **celebrate cultural moments** and passion pillars
- They expect brands to **actively support** and **play a role in culture**

## Authentic Representation & Storytelling



- Actively seek media and brands that **tell genuine stories** - busting stereotypes
- Authentic representation is crucial and if done effectively, **builds trust** – building loyalty to brands and stories
- **Celebrity brand ambassadors** play key roles in establishing credibility with a brand's messaging

## Making 200%ers the Protagonists



- Multifaceted, individualized, diverse approach to storytelling. **One size does not fit all.**
- **100% rooted in heritage and 100% rooted in U.S. Culture**
- **Toggle** between traditions, heritage, culture, and language
- Diverse, yet one.

05.

# Share Your Pro-Social Story

Educate and authentically demonstrate your brand's commitment to an issue or movement that matters



## Communicate

Your brand's efforts around DE&I, sustainability, and other ESG initiatives

Educate your audience and beyond on how your brand/company/industry is making a difference (e.g., supporting caregivers, partnering with non-profits) in the world through **custom content and integrations** across our portfolio.



## Partner

With talent as credible ambassadors for purpose

Align your pro-social efforts (e.g., community health & wellness education) to the passions and causes of **NBCU's top talent** to create an authentic and impactful partnership that further supports the initiative and cause.



## Inspire

Audiences to act via innovative storytelling formats

Bring people into your initiatives and encourage them to join and give back through **Code for a Cause**, which provides the opportunity to donate to brand-supported causes.

<p><i>We have shared ambitions...</i></p> <p><b>Sustainability Pledges</b></p> <p><b>sky</b> Net Carbon Zero By 2030</p> <p><b>NBCUniversal</b> Net Carbon Zero by 2035</p>	<p><b>Investing in DEI</b></p> <p><b>COMCAST</b></p> <p>\$100M pledged to help fight injustice &amp; inequality</p>	<p><b>Supporting Innovation</b></p> <p><b>sky</b> ocean ventures</p> <p>£25M invested to help end the flow of plastics into the sea</p>	<p><b>Advancing Inclusivity</b></p> <p><b>COMCAST</b></p> <p>Investing \$1B over the next 10 years to help close the digital divide for lower income households</p>
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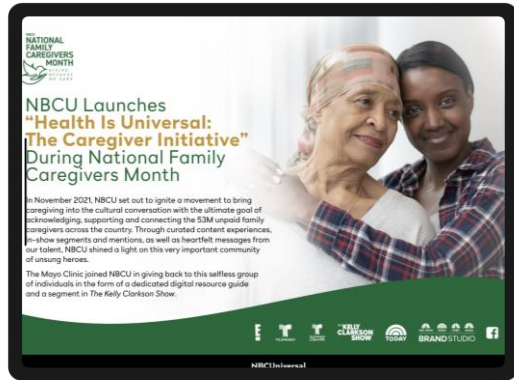


# NBCU Relevant Materials

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*Example Healthcare & Pharma Industry Partnerships*

# NBC UNIVERSAL Healthcare & Pharma Partnership Examples



NBCUniversal





# NBCU Healthcare & Pharma Industry Content

TOGETHER SITE

## Category Content & Strategies



Caregivers Initiative



Insights into Mature Audiences & Streaming



The Rise and Impact of Telehealth



A Marketer's Guide to the Metaverse

## Healthcare & Pharma Case Studies



NBCU + DTC Apple News



AdSmart + Birth Control

2022

# Healthcare & Pharma Industry Assessment

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**NBCUniversal**

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