

NBCUniversal

The Health of Your Brand May Hinge on Wellness

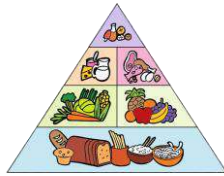
Key Considerations for Bringing
Your Wellness Story to Life
As 'Feeling Good' Becomes a
Necessity and Not a Luxury

NOVEMBER 2022



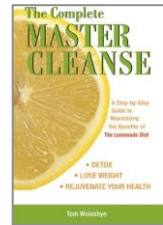
Over time, people's understanding and approach to wellness has evolved in line with larger societal shifts

Post WWII



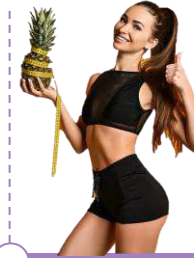
MID - LATE 1900s

.com Era



2000s

Rise of Social Media



2010s

Covid-19 Pandemic



TODAY

Societal Shift

Americans have more disposable income and time to spend on leisure activities.

Consumers have easy access to a wealth of information. The country starts to see the effects of obesity.

People find 'inspiration' everywhere and 'foodie' culture emerges.

While society's physical health is endangered, stay-at-home measures create shared perspectives and experiences around isolation, wellbeing, and more.

Impact on Wellness

Fitness & the Food Pyramid

Exercising becomes an extra-curricular activity and Americans turn to the food pyramid for a balanced diet.

New Routines & Diet Crazes

Good and bad habits come to life in the form of supplements, drugs, and diets like South Beach and the Master Cleanse.

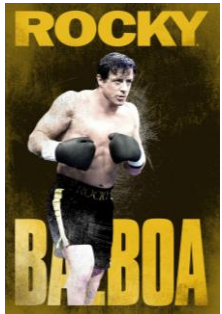
Rise of Clean & Sustainable

As the lines between aspirational and realistic goals blur, new diets arise (i.e., pineapple, keto, Whole30) and the self-care trend begins.

Expansion Beyond Diet & Fitness

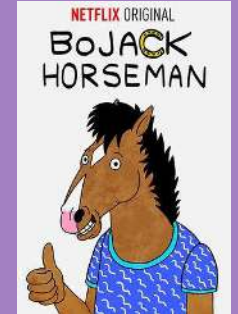
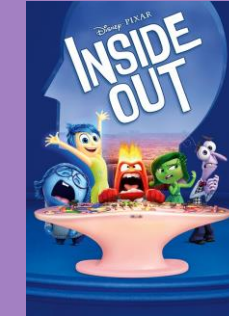
Conversations around wellness become more multi-faceted, with mental health and fitness technology becoming key topics of conversation.

As the notion of wellness has evolved, so too has its depiction in media and content.



Yesterday

health & wellness was considered something you could “see,” whether it was physical or mental.



Today

storytelling features a more layered and holistic health & wellness approach to include elements and experiences that you “can’t see.”

Not only has the meaning of wellness evolved, but **its importance as a personal goal has been elevated in recent years**

As of 2022, 60% of adults say **wellness is more important** than before the pandemic.¹

Sources: 1. Mintel



Through education and promotion of idyllic lifestyles, **social media** has heightened wellness as a priority.



Technology such as apps, wearables, and smart devices has boosted the accessibility, accuracy, and popularity of personal wellness.



A more vocal conversation around **identity** is driving new forms of more personalized wellness offerings.



Conversations around issues like mental health are being normalized in pop culture, putting an emphasis on mindfulness and mental wellbeing.

LOOKING TO THE FUTURE

Consumers are taking a more holistic view of wellness to include dimensions that encompass mind, body, and spirit

Health

35%

of consumers use their smartphone or wearable device to track their health, which is more often than they did pre-pandemic¹

Fitness

\$3.9B

is the expected market value of the VR-powered fitness and wellness market by 2023²

Nutrition

+48%

increase in total enrollment for food subscription services since the pandemic³

Appearance

+16%

growth in DIY beauty and personal self-care category since 2020⁴

Sleep

+7%

is the expected growth CAGR for the sleep aid market over the next eight years⁵

Mindfulness

+65%

YoY increase in the number of searches for yoga and meditation apps⁶

**Despite society's
prioritization of wellness
over the past few years,
barriers still exist,**

and there are often factors outside of one's control that **make achieving wellness difficult**

**“Brands must create
wellness solutions
intrinsically connected
to our existing ecosystems**

to increase accessibility and
the likelihood that they will
be implementable.”

CHRISTIANNA GORIN

*Co-Lead of North America & Chief Experience Officer,
VMLY&R Health*

Since wellness needs are unique and multi-faceted, they tend to fall into distinct groups with different behaviors and priorities

“Wellness doesn't have an easy solution or one-size-fits-all product, it is about finding the products, community and resources you need to fill you up.”

JOE CARR

Senior Brand Marketing
Manager, *Walgreens*

Wellness Wishers | 63M

- Struggle with health & wellness choices
 - Skew middle-aged and white
-

Image Shapers | 54M

- Image conscious tastemakers who prioritize a healthy lifestyle
 - Strong multicultural influence and skew towards urban metros
-

The Invincibles | 53M

- Generally less conscious of their health and wellness decisions
 - Younger and male skewing
-

Trusting Patients | 47M

- Take an active role in managing their health and rely on doctors
 - Skew 65+ and retirees
-

Healthy Holistics | 36M

- Committed to exercise & active health management
 - Trust holistic medicine & open to alternative methods
-

Many brands are taking steps to demonstrate their role in enhancing personal wellbeing...

FORTUNE



"Spotify Gives Workers a Paid Week Off to Recharge"

AD WEEK



"Petco Appeals to Pet Parents as a Health and Wellness Retailer"

GOOD NEWS NETWORK



"LEGO Targets Stressed-Out Adults to Help Them Reduce Anxiety at Home & Work"

BUSINESS WIRE



"Hilton and Peloton Team Up to Enhance the Travel Wellness Experience"

GLOBAL COSMETICS NEWS



"Procter & Gamble Eyes Gen Z with New Brand 'for Body and Mind', Quiet & Roar"

AD WEEK



"Powerade Encourages International Star Athletes to Take a Breath and 'Pause'"

...But wellness can't be something brands only occasionally talk about



Consumers look to brands for **information and advice on important societal issues**

61%

of global consumers say businesses are the most trusted institution, ahead of NGOs and governments¹



Consumers expect brands to **help support and nurture their wellness needs**

46%

of global consumers feel brands consider their wellness a priority but 75% believe brands could do more for their wellness²



Employees expect **wellness programs**

73%

of employers believe in 3 years they will have a differentiated wellbeing strategy to compete for talent and meet a wide variety of needs³

One of the pandemic's greatest lessons has been the elevation of wellness from passing trend to lifestyle essential.

People expect brands to recognize and embrace wellness as a growing priority, and demonstrate their commitment to helping employees and consumers live healthier and more fulfilling lives.







Brands have an opportunity & responsibility to strengthen connections with consumers by embedding wellness as a cornerstone of their brand and business strategies.



As people turn to content for “me time”,
**brands can play an active role
 in helping people get the most
 out of these moments**

while also telling their wellness story

When we look at what Americans do to improve their outlook and find “me time”, **6 of the top 10 are media-centric:**

	50% listen to music
	37% sleep
	34% watch TV programs
	34% watch movies
	31% exercise, work out, take bike rides
	27% play video games
	27% go for walks
	22% pray
	19% use social media, chat, or online forums
	18% read books or magazines

Source: NBCUniversal Proprietary “Me Time” Role of TV Study, 2022

Those who watch TV for “me time” say that it helps them feel more relaxed, more clear-headed, and more like themselves.

“Once I put my son to sleep, **this is my time to unwind and watch my shows.** Those are the ones that I must like, sit and pay attention. I need every detail. I need to know what's going on.”

*Woman, Age 28,
 Memphis, TN*

“I need to wind down. So, in the evening we always put on something funny, and we have certain comedies that we'll just rotate and go through the whole show.”

*Woman, Age 58,
 Saint Peters, MO*

“I think for me it's something that I don't have to do for someone else. My whole day is always around what someone else needs and what someone else chooses and it's like a piece of control. It's one thing that I get to pick that I want to do.”

Woman, Age 30, Virginia Beach, VA

Bringing Your Wellness Story to Life

NBCUNIVERSAL RECOMMENDATIONS

Here are 4 key considerations for effectively communicating your wellness story:

01.

Educate

and authentically demonstrate your brand's commitment to wellness issues

02.

Align

with wellness-oriented moments, programming, and events

03.

Engage

and reinforce messaging with strategic audiences

04.

Create

connection through wellness experiences

01. Educate and authentically demonstrate your brand's commitment to wellness issues

BRAND CONSIDERATIONS:

As consumers increasingly focus on feeling good, brands have an opportunity to not only be clear on their commitments but also demonstrate how consumers can make more wellness-oriented decisions.

Communicate your wellness efforts and educate consumers about your brand benefits through custom content, sponsorships, and talent partnerships.

WAYS TO ACTIVATE:



Editorial Stories

of inspirational wellness thinkers or activists from around the world



Branded Content

showcasing your brand's unique wellness initiatives



Wellness Ambassadors

via talent partnerships where influencers highlight personal journeys and the role your brand plays(ed)



Sponsorships

or takeover stunts showcasing your wellness efforts on a larger scale

02. Align with wellness-oriented moments, programming, and events

BRAND CONSIDERATIONS:

Certain environments and events attract audiences who are naturally interested in that topic and seek greater knowledge and/or interaction.

Build a deeper connection with an already invested audience and reinforce your messaging by aligning with contextual, wellness-related environments and events.

WAYS TO ACTIVATE:



Brand Spotlight

in native wellness content environments
(i.e., morning shows, lifestyle content environments, etc.)



Contextual Targeting

across wellness moments in premium content environments
(i.e., healthy living, comedy, lifestyle, etc.)



Wellness-oriented Cultural Moments

(i.e., Mental Health Awareness Month, Wellness Wednesdays, etc.)



Events and Programming

that celebrate or promote wellness lifestyles
(i.e., sports, fitness, mindfulness, etc.)

03. Engage and reinforce messaging with strategic audiences

BRAND CONSIDERATIONS:

A data-driven approach can help identify sources of growth, improve targeting, and tailor messaging.

Leverage data to relevantly reach audiences across platforms and reinforce brand messaging with wellness targets.

WAYS TO ACTIVATE:



Leverage 1P Data

to engage or suppress current customers



Create Custom Audience Segments

by working with partners to leverage multiple data sources



Seamlessly

Connect with Target Audiences Across Platforms



Consider a Local to National to Global Approach

when telling your wellness story

04. Create connection through wellness experiences

BRAND CONSIDERATIONS:

Collective excitement around in-person events and the rise of new, immersive virtual experiences continues to fuel the return of entertainment experiences.

Capture attention and create a lean-in moment with key audiences by evaluating the role your brand can play within virtual or in-person wellness-oriented experiences.

WAYS TO ACTIVATE:



Motivate and Reward Employees
through unique experiences and incentives



Promote and Drive Engagement
around your brand's wellness-oriented
partnerships and collaborations



Provide Branded Wellness-centric Experiences
at key in-person events



Consider the relevance of your brand's role in
Wellness-Oriented Virtual and Gaming Experiences

NBCUniversal

Thank You

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