

NBCUniversal



# **PHARMA** **2025 YEAR IN REVIEW**

Industry Highlights & Media Trends

as of March 2026

# Agenda

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## Pharma Landscape

Current Landscape & FY'25 Media Trends

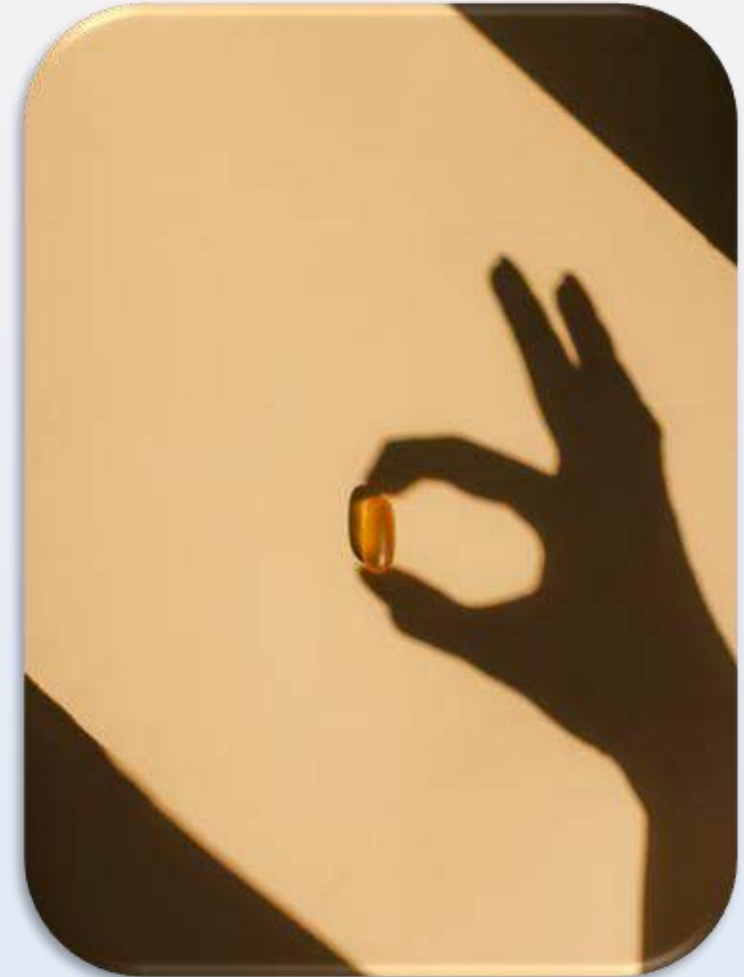
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## Pharma @ NBCU Update

Media Trends, Creative Showcase

3

## Pharma Upcoming Opportunities At NBCU



# Current **Pharma** Category Dynamics

Pharma category remains strong while navigating macro and consumer pressures

## Headwinds



Regulatory challenges linger & privacy restrictions grow **amid shifting policies**

**Looming patent cliff** fast approaching, slowing sales & putting pressure on margins<sup>1</sup>

**Competition increases** as new players, formats & treatment areas enter the market

**Trust slipping** among Gen Z & Millennials<sup>2</sup>

## Tailwinds



AI adoption is now core to pharma's framework

Momentum in preventative health fuels more pipeline

Growth in D2C platforms continues prioritizing the patient experience

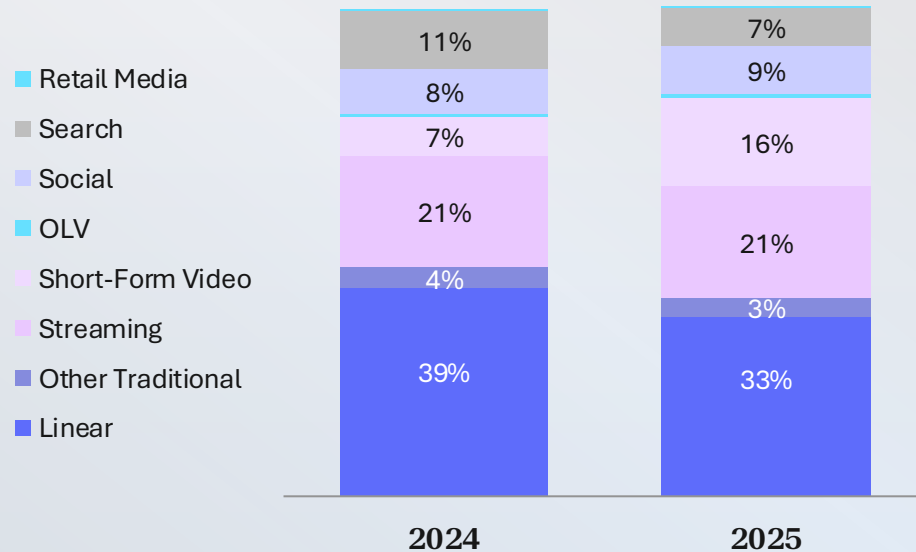
Perceptions hold steady among older generations<sup>2</sup>

# Pharma Marketplace Spend

The category continues to keep pace with evolving consumer viewing behaviors and marketplace shifts, continuing it's lean into digital and streaming while linear remains flat

## Pharma Category Media Mix

Share of Spend, in %



Traditional vs. Digital % Split	2024	2025
	43% / 57%	37% / 63%

### Total Spend

**+17% YoY**

Driven by digital growth (+29%)

### Streaming

**+18%**

With strongest growth in programmatic (+20%) vs. direct buys

### Short Form

**2.7x YoY**

Now accounting for 16% of total spend

### Linear Spend

**+1% YoY**

Fueled by Sports (+23%), Hispanic (+14%), Broadcast Ent (+9%)

# PHARMA NBCU SPEND

2025 vs. 2024

**NBCU Pharma spend is accelerating** across sports, streaming, and advanced buying, driven by premium, culture-forward content



## LINEAR

growth driven by sports & ent. for trusted scale and cultural connection, while news & ent. maintain dominant share

**+4%**  
in total linear spend

**+34%**  
in Sports

**+10%**  
in Broadcast Ent



## STREAMING

momentum is strong, valuing premium content, impact, and reach in a crowded environment

**#1**  
category, volume growth

**+29%**  
in Peacock spend

**3x**  
in Pause Ad



## ADVANCED

increased substantially across buying paths, seeing continued elevation of programmatic

**+53%**  
in Total Advanced

**2x**  
programmatic growth  
across all digital



## HISPANIC

continues to rise in importance, seeing media spend in Spanish Language linear increase

**+15%**  
in Spanish Language  
linear spend

# Creative & Innovation

## NBCU: Pharma Breaks Through at the Big Game

With brands like Novo Nordisk, Boehringer Ingelheim, and Novartis leveraging America's biggest stage to educate audiences; Wegovy led engagement through storytelling prominently featuring NBCU talent

### Pharma's Super Bowl Moment



#### Novo Nordisk

earned 3.7x engagement, topped pharma by tapping NBCU talent & others to promote Wegovy in the Super Bowl<sup>1</sup>



#### Boehringer Ingelheim

tapped Octavia Spencer & Sofia Vergara to launch its CKD awareness campaign 'Detect the SOS'



#### Novartis

partnered with NFL legends for "Relax Your Tight End" to promote early prostate cancer testing, debuting creative within TODAY

# Creative & Innovation

## Across The Marketplace: Spotlighting Oncology

### Marketplace



### Pfizer's Always-On Initiative

Pfizer launched a year-long cancer screening campaign with a hopeful spot focused on a boy who fought cancer and won – Rocky style. It concluded with one line: "Pfizer is fighting for 8 cancer breakthroughs by 2030."<sup>1</sup>



### Shield's Awareness Campaign

Guardant tapped the Grey's Anatomy star to front its campaign for early cancer screening with its Shield blood test – launching March 3rd to coincide with Colorectal Cancer Awareness Month campaign.<sup>2</sup>

# 2026 PHARMA Predictions

These are **5 key topics** as the pharma industry navigates evolving consumer behavior & perceptions as well as regulatory pressures impacting how brands communicate and build trust.



## Paging Doctor AI

Consumers are turning to AI for health information due to speed and personalization, while these tools carry risks of misinformation and remain under regulatory scrutiny.

Brands that deliver credible, easy-to-find resources will better connect and rise to the top as AI continues to shape their choices.

### 35%

of U.S. adults use AI tools to gain insight into their health & wellness, though 30% don't trust the results<sup>1</sup>

## Social Is The New Second Opinion

The patient-care network is turning to social for both health research and connection (e.g., KOLs, like-minded users). As social fosters community, there is risk of misinformation.

Pharma can leverage their expertise and vast library of knowledge to build trust as it becomes harder for people to distinguish truth.

### 55%

of adults use social media to find health information and advice at least occasionally (and 57% among women)<sup>2</sup>

## Going Beyond Medication

Brands are expanding their scope to meet consumer needs (e.g., DTC, telehealth), while accommodating drug pricing pressures from the administration.

Brands will shift media investments and promote new programs / capabilities beyond traditional products as interest & innovation rise.

### 72%

of U.S. adults 25+ said they'd be at least somewhat likely to buy a medication directly from a pharma company<sup>3</sup>

## The Expansion of GLP-1s

GLP-1s are growing, with established players expanding medications / indications + telehealth brands jumping in.

Societal conversation will continue to rise, traces of taboo will subside, its influence will further infiltrate day-to-day industries, from retail to food.

### 1 in 5

U.S. adults have used GLP-1s, with usage rates increasing as costs continue to go down<sup>4</sup>

## Oncology Magnified

Oncology growth is no longer driven only by cures but by survivors. As survival rates rise, cancer is managed as a long-term condition rather than a terminal disease.

Oncology media spend continues its strong growth trajectory as brands look to drive awareness and education for care.

### 70%

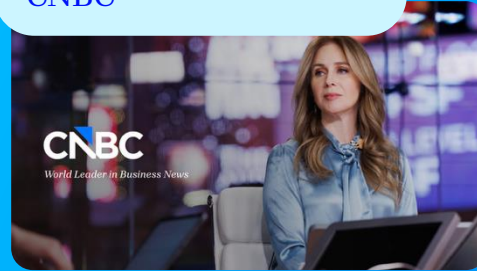
The five-year survival rate for all cancers hit 70% for the first time, with improved survival outcomes for more fatal diagnoses<sup>5</sup>

# 2026 Opportunities for the **Pharma Category**

## The Five-Star Weekend



## CNBC



## TODAY



## Premios Billboard



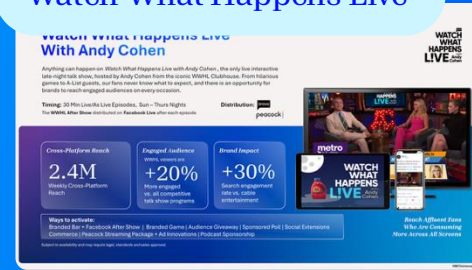
## Access



## Emmy's



## Watch What Happens Live



## Bravo Fan Fest



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**THANK YOU**

**NBCU Pharma Category Strategy Team:**

Megan Ryan, Nikita Tolani, Melissa Perron, Melissa Roth