

The background of the slide is a photograph of a laboratory setting. Several microscopes are visible, with their eyepieces and objective lenses in focus. The lighting is soft, and the colors are muted, giving it a professional and scientific feel. A white rectangular box is overlaid on the left side of the image, containing the text.

NBCUniversal

2022

Healthcare & Pharma Industry Assessment



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**

Contents

2022 Landscape

Healthcare & Pharma
Forward-Looking Trends

NBCU Healthcare & Pharma
Strategic Considerations

NBCU Relevant Materials



2022 Landscape

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,¹ sentiment is stabilizing.²



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.³



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.⁴

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**.¹ In 1Q, **Mark Cuban launched Cost Plus Drugs** with the promise of “[doing] whatever it takes to get affordable” medications to patients.²

84%

Of adults who take long-term medications save money each time they fill through an online pharmacy¹

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 individual³

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 appointment⁴

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.⁵

\$10B

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

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 providers⁷

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

Science

Alzheimer's drug approved despite doubts about effectiveness

MENTAL HEALTH

FIERCE
Healthcare

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

GOVERNMENT

 **REUTERS**

Landmark U.S. healthcare bill sets stage for lower Medicare prescription drug costs

DE&I

sanofi

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

Healthcare & Pharma Forward-looking Trends

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



KEY HEALTHCARE & PHARMA TRENDS

We Expect to Influence Marketing & Media Strategies



New Entrants Navigate a
Crowded Market



Healthcare Opts 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

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.

There are more new drugs...



Between 2020 and September 2022, **the FDA approved 124 new drugs²**

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 2016-2020¹

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.¹

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 Hololens²

BLOCKCHAIN



Gives Patients **Ownership of their Medical Records³**

Providers

DIGITAL TWINS



Make Health Predictions via **Simulations Using Real-World Data³**

VIRTUAL PHARMACIES



Sell Goods & **Healthcare in the Metaverse⁴**

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.¹

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](#)

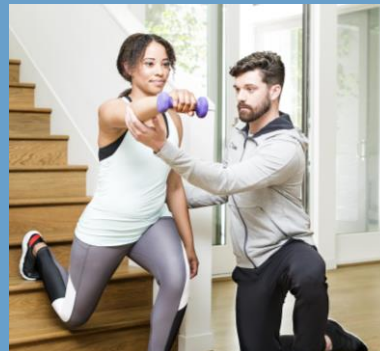


Retailers Expand Healthcare Capabilities to Consumers
by acquiring and partnering with specialized startups

EXAMPLE:

Walmart Health Virtual Care

brings its retail clinics and telehealth under one roof²

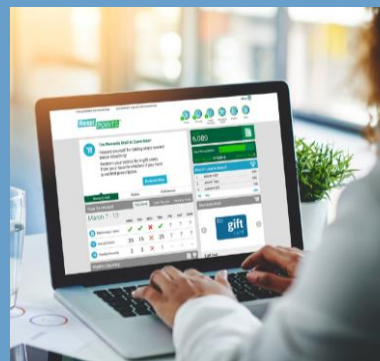


New Tech Makes At-Home and Mobile Care Possible
Eliminating cases for poor communication and slower care

EXAMPLE:

Get Luna

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



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 adherence⁴

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.¹

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.”**²

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



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



moz://a

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



FAST COMPANY

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



FIERCE
Pharma

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

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.¹

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.**

As much as

80%

of a person's **health outcomes** are driven by SDOH²

Meanwhile,

90%

of the U.S.' annual healthcare expenditures are for people with **chronic and mental health conditions**³

EXAMPLES



UnitedHealth Group

invested an additional \$100M in **affordable housing initiatives**⁴



Medi-Cal,

California's Medicaid program, began delivering **medically-tailored meals** to members⁵



CVS Health and Uber Health

partnered to provide people in underserved communities with **free rides to medical care, work, or education**⁶

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

Key Considerations for Driving Growth for Healthcare & Pharma Brands



NBCUNIVERSAL

Healthcare & Pharma Strategic Considerations



01. Lead with Creativity & Innovation

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

02. Create Relevance through Culture

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

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

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

05. Share Your Pro-Social Story

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

NBCUNIVERSAL

Healthcare & Pharma Strategic Considerations



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:

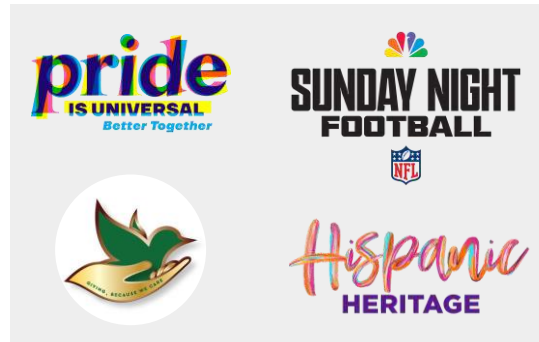
Sequential Storytelling | Quest
TV Network | Ad Innovations |
Actionable Units

02. Create Relevance Through Culture

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

1 in 3

Americans said they see pharma brands more like lifestyle brands, citing Nike¹



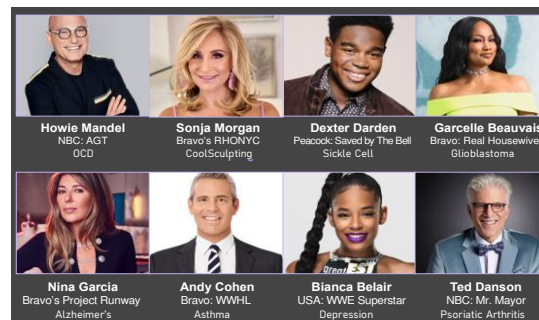
Cultural Moments and Events

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



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



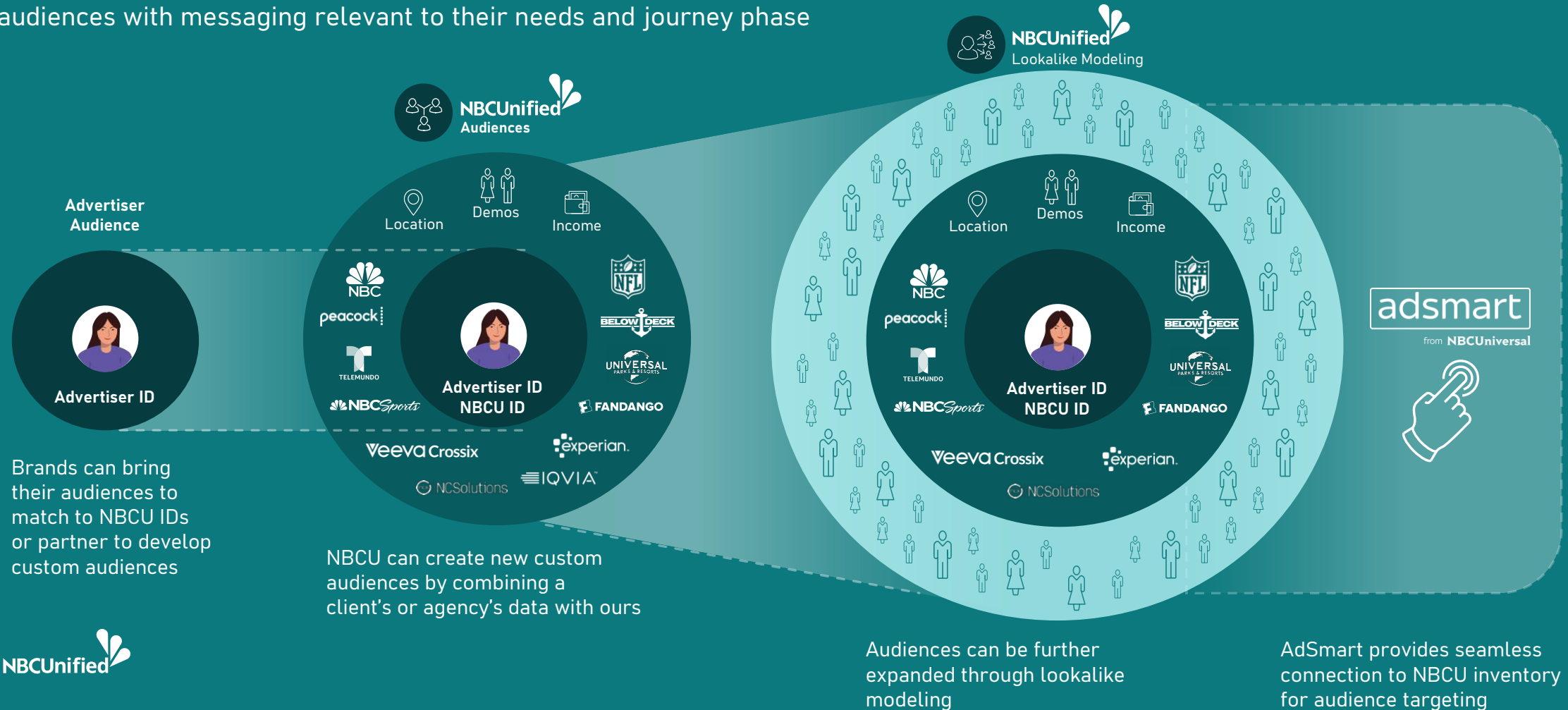
Influencers

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.

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



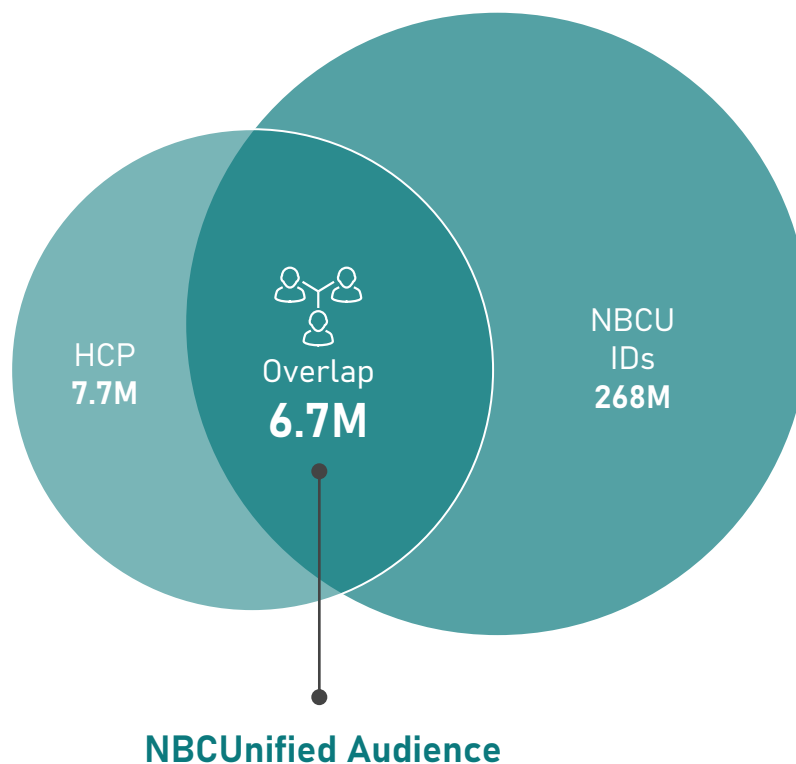
03.

Turbocharge Your Video Approach with Data

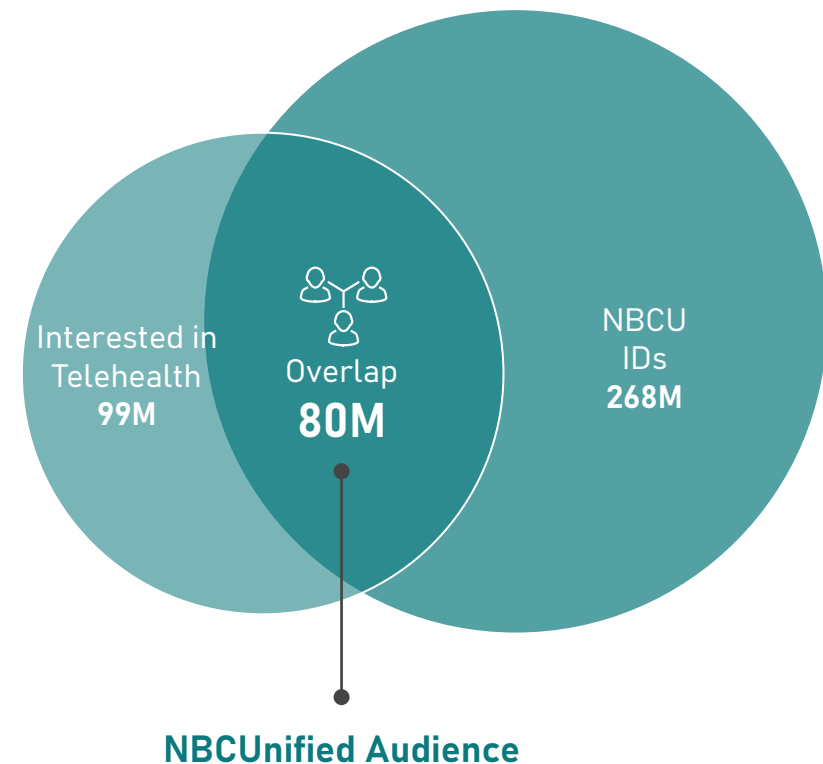
NBCUnified allows us to build a wide range of data audiences, and brands to combine their data with ours

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

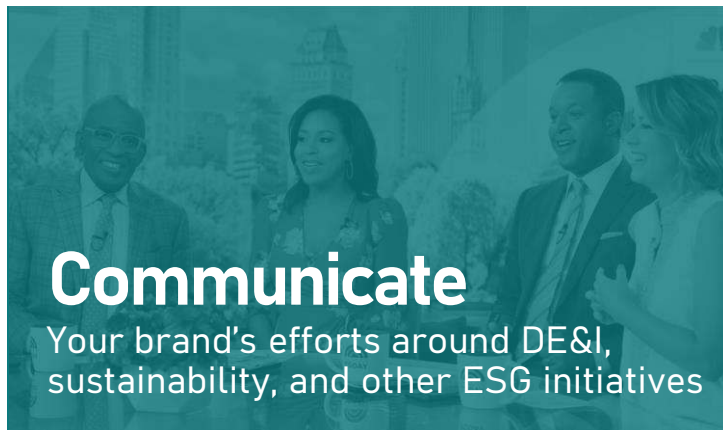
Making 200%ers the Protagonists



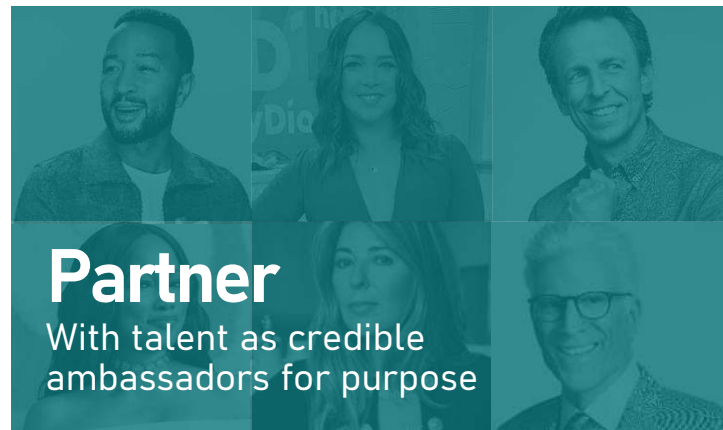
- Multifaceted, individualized, diverse approach to storytelling. **One size does not fit all.**
- **100% rooted in heritage and 100% rooted in U.S. Culture**
- **Toggle** between traditions, heritage, culture, and language
- Diverse, yet one.

05. Share Your Pro-Social Story

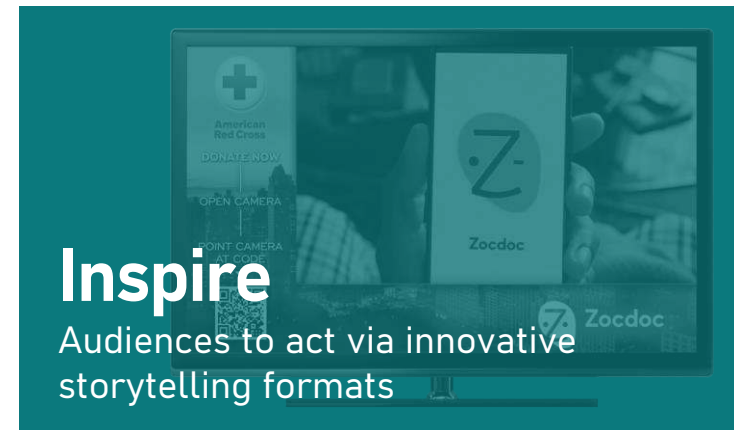
Educate and authentically demonstrate your brand's commitment to an issue or movement that matters



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.



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.



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.

**We have shared
ambitions...**

Sustainability Pledges

sky

Net Carbon Zero By 2030

NBCUniversal

Net Carbon Zero by 2035

Investing in DEI

COMCAST

*\$100M pledged to help fight
injustice & inequality*

Supporting Innovation

sky ocean ventures

*£25M invested to help end the
flow of plastics into the sea*

Advancing Inclusivity

COMCAST

*Investing \$1B over the next 10 years
to help close the digital divide for
lower income households*

NBCU Relevant Materials

Example Healthcare & Pharma Industry Partnerships



NBCUNIVERSAL

Healthcare & Pharma Partnership Examples



NBCUniversal



NOVARTIS

Project RUNWAY



ancestry



WAYSTAR
Healthcare IT



NASCAR



NBCU Healthcare & Pharma Industry Content

TOGETHER SITE

Category Content & Strategies



Caregivers Initiative



Insights into Mature Audiences & Streaming

Healthcare & Pharma Case Studies



NBCU + DTC Apple News



AdSmart + Birth Control



The Rise and Impact of Telehealth



A Marketer's Guide to the Metaverse

2022 Healthcare & Pharma Industry Assessment

NBCUniversal

NBCU HEALTHCARE & PHARMA CLIENT STRATEGY TEAM:
Megan Ryan, Nikita Tolani, Rosie Nisanyan

