

NBCUniversal

2023

# Healthcare & Pharma Industries Assessment



# Welcome!



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## Introduction

Explore NBCUniversal's latest perspectives and insights into the Healthcare & Pharma industries. 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 Industries Evaluation
  - Conversations with Healthcare & Pharma Advertisers and Agencies
  - Continual Marketplace Analysis
  - Examination of Consumer Attitudes towards the Healthcare & Pharma Industries
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# NBCUniversal Has a Unique Perspective

## Pharma Industry Advertisers



Pharma DTC (incl. Biotech)

## Healthcare Industry Advertisers



Digital  
Pharmacies



Healthcare  
Public Service  
/ Non-Profit



Healthcare  
Providers



Healthcare  
Services



Consumer  
Medical Products  
& Devices



Professional  
Equipment  
& Services



Health  
Insurance



Other

# Looking Back

2023 IN REVIEW

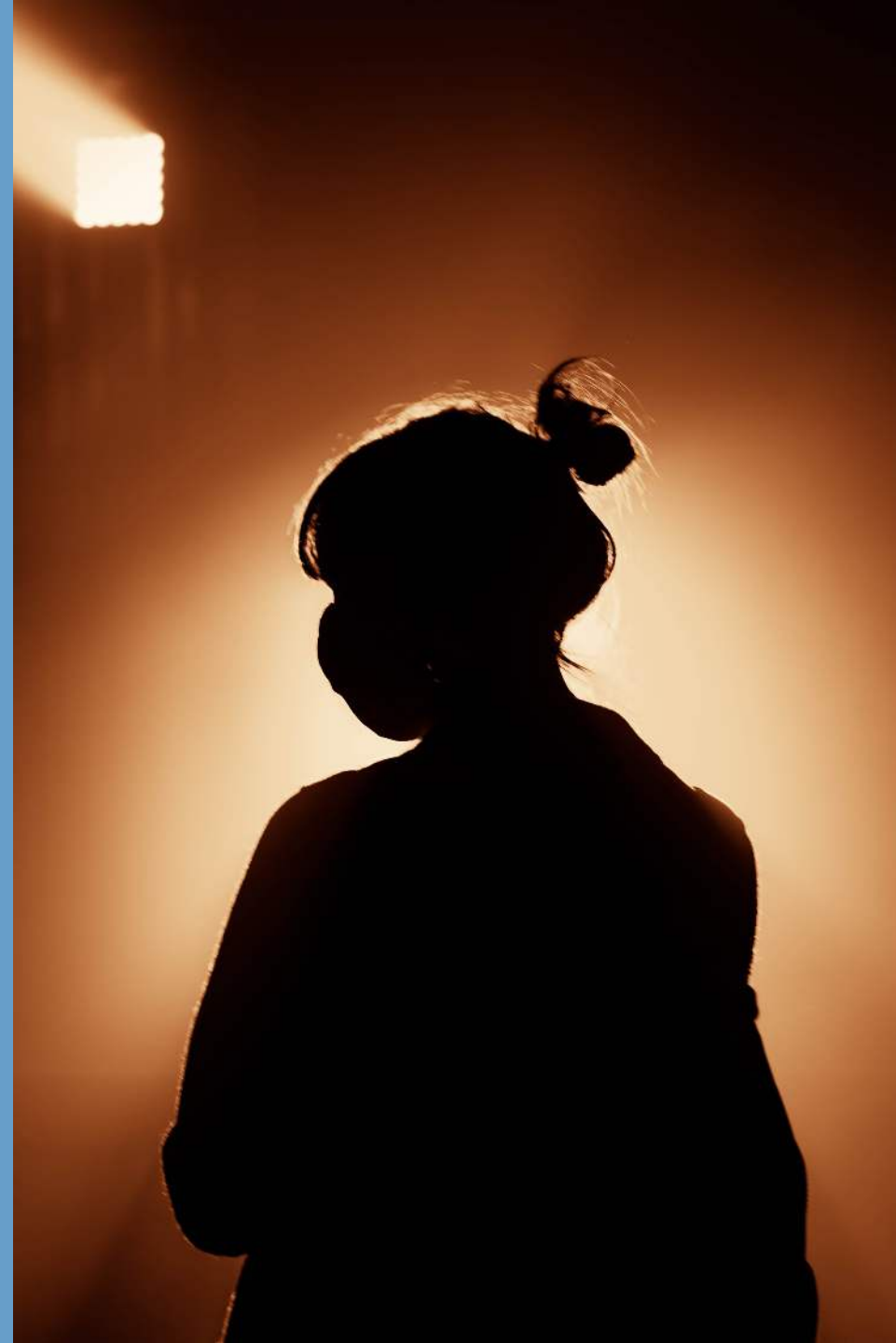




For Healthcare & Pharma, 2023 was the year of

# Navigating the Spotlight

as people continued to lean  
into the health conversation as  
a society



# Healthcare & Pharma Brands Navigate the Spotlight in 2023

## HEALTHCARE & PHARMA Cost of Healthcare in the Public Eye



One of the long-lasting effects of COVID is the **larger focus on social determinants of health and their impact on health equity and accessibility**. This focus has resulted in increased conversation around the **high cost of drugs** for all parties involved (patients, insurers, employers, etc.).<sup>1</sup>

## PHARMA Steady Wave of Approvals



An increased focus on M&A and R&D boosted drug pipelines this year, with **35 FDA approvals as of August 2023, 2x as many as STLY**.<sup>2</sup> Coupled with high profile patent expirations,<sup>3</sup> this led to a more crowded landscape which will only continue.

## PHARMA Off-Label Use Reducing Accessibility



As some drugs became popular for unintended conditions, **the surge in demand**, especially from celebrities, **led to supply shortages and rising costs for patients**, such as those with diabetes, trying to access and use the medications as intended.<sup>4</sup>

## HEALTHCARE & PHARMA Mindful Communication at the Forefront



**Humanizing communication became even more essential** – from being more conscious of people's attitudes, behaviors, and journeys to connecting with audiences in need. For example, brands & providers turned to social (e.g., TikTok<sup>5</sup> and Reddit) to meet people where they search for and talk about health info.

BRANDS ACROSS HEALTHCARE SUB-CATEGORIES ARE

# Adapting To The Cultural Shifts Impacting The Industries

## Individual Health Insurance Market

Ahead of the 2024 standards change from [CMS](#), 2023 has **been a year of growth in plan participation and increase in plans and options** offered as the market strived to meet the needs of consumers and address access to healthcare.

### 17%

The percentage increase of plan options from insurers in 2023 vs. 2022<sup>1</sup>

## Retail Health Clinics

Retail Health Clinics continue to **disrupt the healthcare landscape**, leveraging their large physical presence to meet the demand for **convenient care options** and better serve **underrecognized communities**.<sup>2</sup>

### +200%

The increase in utilization that retail health clinics have seen over the past five years<sup>2</sup>

## Hospitals & Health Systems

As the industry puts a greater focus on **value-based care** (high quality, convenient, and affordable medical care), legacy providers are even more **vulnerable to disruption** from retail health clinics and virtual care providers.<sup>3</sup>

### 20%

of U.S. adults haven't accessed health or wellness services in the past year, *most often citing not needing to (31%) or high costs (23%)*<sup>4</sup>

## Telehealth

The rise in telehealth (e.g., hims & hers) has contributed to the rise in **remote prescribing**. While increased access to medication is often positive, there is also an increased risk of **supply shortages or addiction** to medications such as Adderall and Ketamine.

### Nov. 2023

The date to which the U.S. COVID-19 telemedicine flexibilities for prescribing controlled substances have been temporarily extended<sup>5</sup>



# Key Healthcare & Pharma Headlines from 2023

## COVID

5 / 5 / 23



"WHO chief declares **end to COVID-19** as a global health emergency"

## WOMEN'S HEALTH

7 / 21 / 23



"The FDA approved the US' **first over-the-counter birth control pill**. What happens next?"

## VACCINES

7 / 22 / 23



"The CDC is preparing for a winter with '3 bugs out there': **Covid, flu and RSV**

***Vaccine fatigue** is already here, although many Americans will be urged to get three different shots this fall."*

## ACCESSIBILITY

8 / 29 / 2023



"U.S. Announces First Drugs Picked for **Medicare Price Negotiations**"

## MARKETPLACE PARTNERSHIP EXAMPLES

## Evolving Communications, Media Strategy, &amp; Storytelling



### Educating Social Influence

GSK released an **unbranded campaign** titled “It Will” to **raise awareness of the serious risks of lupus**, by flipping the statement to “I Will.” The effort partnered with lupus patients, caregivers, and HCPs and focuses on the need to take preventative measures – particularly for Black/AA audiences and women.



### Igniting Emotion Via Interactive Experiences

Amazon joined the Ad Council’s Sound It Out campaign to introduce the “When You Can’t Say It, Play It” digital experience, giving parents and caregivers the tools to be **more in tune with their teen’s emotions** through curated music, available in English and Spanish.



### Influencing Perceptions With Mass Awareness

Moderna released an ad campaign Moderna – “Welcome to the mRNAge.” with the goal of **establishing itself as a leader within medical research**, showcasing their mRNA innovations and being much more than just a COVID vaccine.



### Aligning with Authentic Celebrity Voices

Dexcom **continued their partnership with spokesperson and Type 1 Diabetic Nick Jonas** for a spot airing during the Super Bowl for the second straight year after proven success. Last year’s spot helped Dexcom add 800,000 users alone.

# Looking Ahead

KEY INDUSTRY TRENDS TO WATCH



LOOKING AHEAD

# Key Healthcare & Pharma Trends Including Emerging Sub-Categories We Expect to Influence Marketing & Media Strategies



More Investment  
**in Tech & Innovation**



Making Strides Toward  
**Closing the Health Equity Gap**



Looking Beyond the  
**Doctor's Office**



Recognizing the Scale of  
**the Patient-Care Ecosystem**



Emerging Sub-Categories & Brands  
**Alzheimer's Prescription Drugs,  
Women's Health (FemTech)**

# More Investment in Tech & Innovation

**Uncovering solutions to concerns for which both patients and providers have yet to find answers.**

Prioritizing tech advances in the R&D phase – like with Gen AI – can lead to better awareness, access, and affordability of care once in the hands of patients and their providers as they navigate their journey, from diagnosis to management.

As we advance forward, the industry will work toward evolving and incorporating new tech like Gen AI vs. running away from it.

Sources: 1. [Genetic Engineering & Biotechnology News](#); 2. [arbes](#); 3. [CNBC](#); 4. [CNET](#); 5. [Dartmouth](#); 6. [eMarketer](#)

## Research & Development

emerging tech used for mRNA vaccine advancements beyond COVID-19

### Pandemic Preparedness

Self-amplifying tech used for infectious diseases (e.g., Arcturus Therapeutics & CSL)<sup>1</sup>

### Rare Diseases

25–30M Americans have a rare disease, but there are currently no therapies available for 95% of them<sup>2</sup>

### The Unknown

Tech can help tackle budding diseases that have the potential to increase in impact (e.g., fungal)<sup>3</sup>



## Diagnosis & Treatment

New machine learning used to more accurately evaluate & care for patients

### Full-body MRI Scans

E.G., Prenuvo Detects 500+ Conditions<sup>4</sup>



### Image Editing

E.G., Ezra's Full-body Flash<sup>4</sup>

### Genomic Sequencing

E.G., Dartmouth's Center For Precision Health & AI<sup>5</sup>



## Health Management

investments in Digital Therapeutics to play a critical role in future chronic-disease management, including adherence

### EXAMPLE PARTNERSHIP

Bayer's Consumer Health signed a deal with Mahana Therapeutics supporting prescription DTx for chronic conditions<sup>6</sup>

# Making Strides Toward Closing the Health Equity Gap

Moves from the government and increased conversation inches us closer, knowing there's still work to be done.

Increased coverage and cultural movements around health issues impacting these communities will lead to **more recognition among the masses**, with brands recognizing the urgency to improve and prioritize their care.

## Signs of Movement Toward Closing the Gap

*From growing markets to government investments*



### Women's Health

Predicted to be worth over \$47B by 2026, +4.5% CAGR ('21-'26)<sup>1</sup>



### LGBTQIA+ Health

Sex reassignment surgery market expected +11.5% CAGR ('23-'31)<sup>2</sup>



### Multicultural Health

Cancer Moonshot Initiative: \$108M for tribal community needs; \$50M to FDA for underrepresented in clinical trials<sup>3</sup>

----- MARKET GROWTH -----

----- INVESTMENT -----

## Advancements Are Getting Talked About

### WOMEN'S HEALTH

#### FDA Approvals

*for medications like the abortion, postpartum depression, and OTC birth control pills*

### LGBTQIA+ HEALTH

#### Eliminated Restrictions

*by blood banks for gay and bisexual men proposed by the FDA thanks to new tech*

### MULTICULTURAL HEALTH

#### Diversity in Clinical Trials

*Pharma companies aim for more accurate representation after years of medical mistrust among Multicultural communities*



# Looking Beyond the Doctor's Office

From the start of the pandemic to now, how people use telehealth is changing.

With tech advancements and evolving consumer behaviors, virtual care capabilities are becoming more fragmented, but also, more normalized. Ensuring the experience is as seamless as it can be will be the tipping point to advertising.

## Virtual Care



### Then

#### APPROACH:

*Reactive  
and general*

#### USES:

*primary &  
urgent care*

#### EXAMPLE TYPES OF CARE:

*telemedicine;  
patient portal  
communications*

### Now

#### APPROACH:

*Proactive, normalized  
and nuanced*

#### USES:

*condition-specific,  
second opinions*

**EXAMPLE  
TYPES OF CARE:**  
*remote patient monitoring;  
evolved digital communications (e.g.,  
texting, advanced portal tracking)*

## CUSTOMER NETWORKS

*A new pipeline that reflects their needs*

## COMMUNICATION

*Reach networks where they are, not where brands want them to be*

## CREATIVE

*Communicate with messaging that makes them feel heard, giving relevant info to their situation*

**Patients**

**Caregivers**

**Healthcare Providers**

**Generations**

*(e.g., Mature adults to Gen Z)*

**Lifestages**

*(e.g., parents)*

### Recognizing the Scale of the Patient-Care Ecosystem

Rethinking business models and modernizing how the industry communicates at a mass scale for advertising to be customer centric and align with changing expectations

### Data & Targeting

*(e.g., target by disease state to connect with patients)*

### Passion Points

*(e.g., humor, sports, entertainment)*

### Tips

*(e.g., provider myth busting social videos)*

### Cross-Platform

*(e.g., co-viewing & second screen to reach families)*

### Relevance

*(e.g., utilizes talent and messaging related to the network's experience)*

### Digital Marketing

*(e.g., email, webinars to connect with HCPs)*

### Timeliness

*(e.g., understands where people are in their care journey, from diagnosis to treatment and recovery)*

### Social Media

*(e.g., TikTok for Gen Z)*

## DISEASE STATE TO WATCH

## Alzheimer's Prescription Drugs

**What it is:** "A new category of medications that target the underlying disease process of Alzheimer's, instead of only treating the symptoms of the disease"<sup>1</sup>

**Why it matters:** Developments in this space are increasingly part of the cultural conversation, are relevant to the care network of those with Alzheimer's (i.e., caregivers, family, HCPs, etc.), and education (paid advertising) is important for a brand-new category

## Why to Watch

**\$13B**

Projected 2031 Global Market Size | +8.1% CAGR from 2022<sup>2</sup>

**141**

drugs in the development pipeline for Alzheimer's, as of January 1, 2022<sup>3</sup>

Brands to Watch<sup>3,4</sup>

## IN MARKET

**Aduhelm**<sup>®</sup>  
(aducanumab-avwa)  
(Biogen)

100mg/mL  
injection, for  
intravenous use

**LEQEMBI**<sup>®</sup>  
(lecanemab-irmb) 100 mg/mL  
INJECTION FOR INTRAVENOUS USE  
(Eisai & Biogen)

## IN PIPELINE

**Donanemab**  
(Eli Lilly)

**Gantenerumab**  
(Genentech & Roche)

## Ad Spend

**\$0**

Alzheimer's Prescription  
Drug 2022 U.S. Ad Spend<sup>5</sup>



## ON LEQEMBI'S FDA APPROVAL:

"I don't think we can understate the **significance of this moment.**"

- Donna Wilcock, Assistant Dean of Biomedicine at the University of Kentucky<sup>6</sup>

## SUBCATEGORY TO WATCH

## Women's Health (FemTech)

**What it is:** "Health software and tech-enabled products and services that cater to women's health needs"<sup>1</sup>

**Why it matters:** FemTech is increasingly part of the cultural conversation; investing \$300M in women's health research will generate over \$13B in global economic returns<sup>2</sup>

## Why To Watch

**\$103B**

Projected 2030 Global Market Size | +8.1% CAGR from 2022<sup>3</sup>

**Over 60%**

of FemTech startups were founded in the last five years<sup>4</sup>

Brands to Watch<sup>3,4,5,6,7</sup>

elvie  
(Intimate Health)

JOYLUX  
(Menopause)

MAVEN  
(Digital Clinic)

NURX.  
(Telemedicine)

twentyeight  
(Telemedicine)

Flo  
(Menstruation /Fertility)

Clue  
(Menstruation /Fertility)

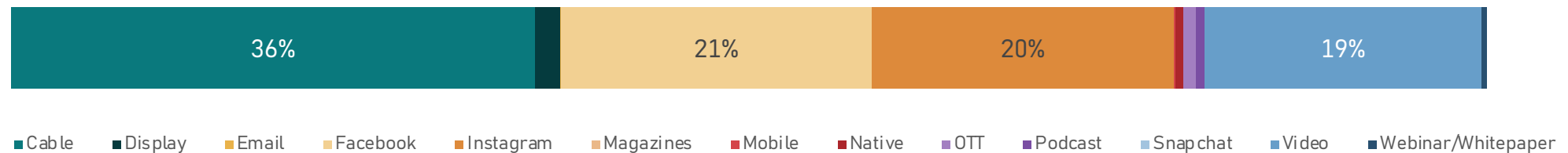
CARROT  
(Fertility)

kindbody  
(Fertility)

## Ad Spend

**\$23.7M**

FemTech 2022  
U.S. Ad Spend<sup>7</sup>  
+26% vs. 2021

2022 Media Mix<sup>4</sup>

## SUMMARY

# Key Healthcare & Pharma Trends Including Emerging Sub-Categories We Expect to Influence Marketing & Media Strategies

**More Investment in Tech & Innovation**

Uncovers solutions to concerns patients and providers have yet to find answers to

**Making Strides Toward Closing the Health Equity Gap**

Moves from the government and increased conversation inches us closer, knowing there's still work to be done

**Looking Beyond the Doctor's Office**

From the start of the pandemic to now, how people use telehealth is changing

**Recognizing the Scale of the Patient-Care Ecosystem**

Rethinking business models and modernizing how the industry communicates at a mass scale for advertising to be customer centric and align with changing expectations



Emerging Sub-Categories & Brands  
**Alzheimer's Prescription Drugs,  
Women's Health (FemTech)**

# The Power of Advertising

& MEDIA TRENDS TO WATCH





# The Power of Advertising For Pharma Brands

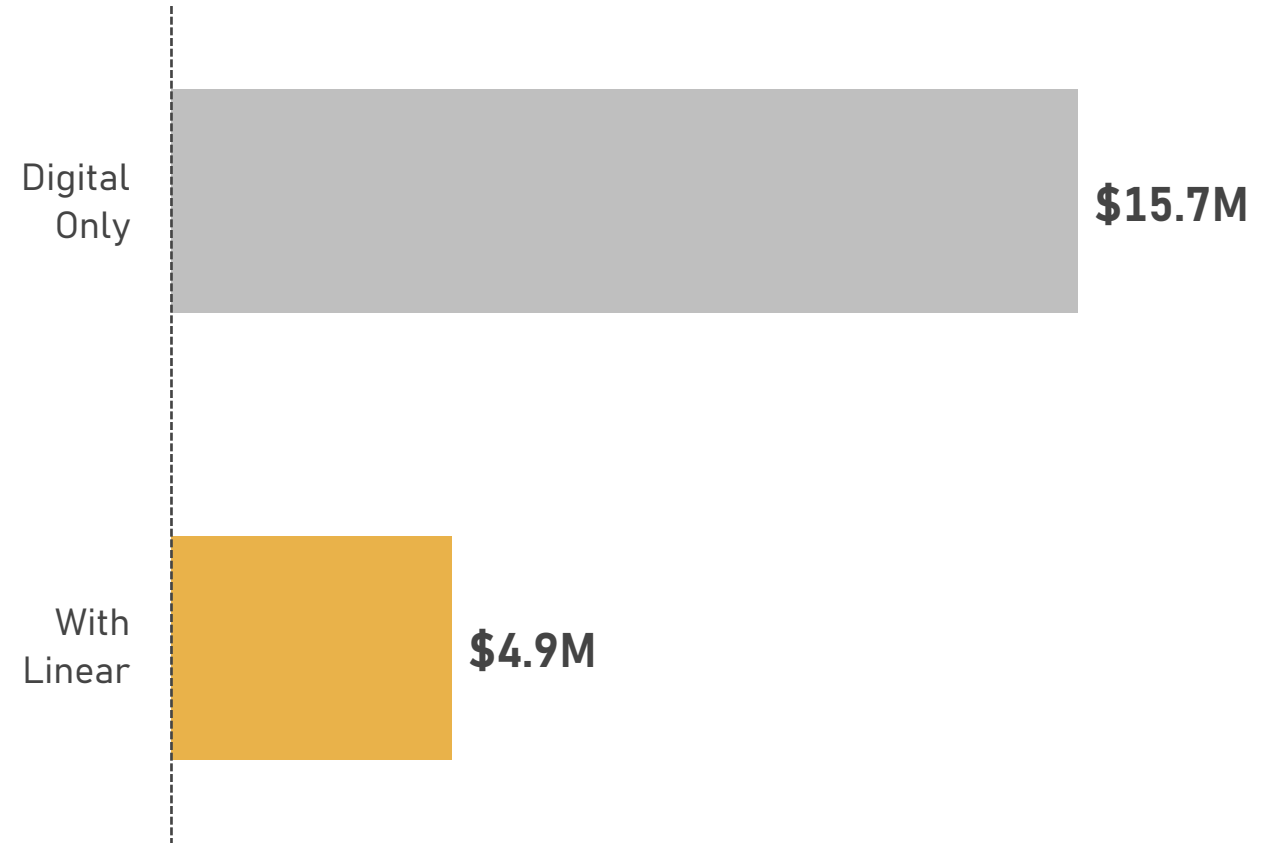
WITH LINEAR IN THE MIX,  
**Less dollars  
needed to drive  
bigger gains in trust**

Including linear in the media mix greatly **amplifies the impact on trust, while pure digital spending required higher levels of investment to achieve the same effect**

Sources: MediaRadar, Morning Consult; NBCU proprietary analytics. Analytics were statistically significant >95% using regression models; adjusted r2 was 48% for the period analyzed with a standard error of .01

## Incremental Average Spend Needed to Increase 1pp of Trust

Estimated based on historic monthly spend

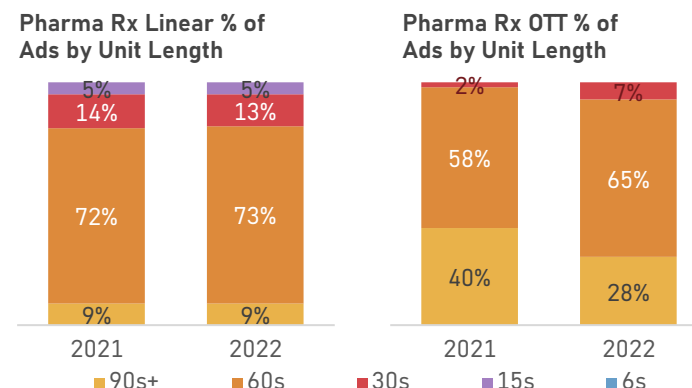


# Pharma Media Trends to Watch

That will drive maximum impact for the industry, with goals of reaching and connecting with the full patient-care ecosystem

## THE RISE OF Shorter Unit Lengths<sup>1</sup>

Brands are mixing up unit lengths, especially when advertising on streaming platforms. 90s on streaming declined 12pp 22 vs 21.



## GETTING CLOSER WITH Digital Media

**+64%** increase in short form  
1H'23 vs. 1H'22<sup>2</sup>

**+16%** increase in social  
1H'23 vs. 1H'22<sup>2</sup>

As brands are seeking to show up where people are searching for medical information and looking for answers.

## The Fight For Attention CONTINUES

Linear <sup>3</sup> '22 vs. '21	Streaming <sup>4</sup> '22 vs. '21
126 medications (+5%)	41 pharma cos. (+14%)
1.6B pharma company ad airings (+31%)	127 medications (+30%)

## OPPORTUNITY REMAINS TO Reach & Engage Hispanics

**13x** Faster growth rate between '11 to '21 of Hispanic individuals vs. Non-Hispanic for pharma companies<sup>5</sup>

VS.

**~1%** Of total 2022 Pharma DTC dollars invested in Hispanic media<sup>6</sup>

Sources: 1. MediaRadar Prescription Pharma Ad Count by Unit Length 2021-2022; 2. SMI 1H 2022 vs. 1H 2023, Prescription Drugs; 3. iSpot, Airings Report, 2022 vs 2021, Pharma Rx and Pharma Health Information industries; 4. Source: MediaRadar, 2022 vs 2021, Prescription Drugs with OTT spend; 5. 2021 & 2011 Bureau of Labor Statistics Consumer Expenditure Surveys; 6. SMI Pharma DTC Ethnicity = Hispanic

# Partnering with NBCU

INDUSTRY PERFORMANCE, STRATEGIC CONSIDERATIONS  
& PARTNERSHIP EXAMPLES



# NBCU Proven Impact For Pharma Advertisers

Across Brand KPIs



## BUSINESS OUTCOME

## NBCU PHARMA CAMPAIGNS – Test vs. Control

Brand  
(Upper Funnel)

Brand  
Familiarity  
**+43%**

Ad  
Recall  
**+34%**

Brand  
Favorability  
**+28%**

Brand  
Consideration  
**+61%**

Performance  
(Lower Funnel)

Search  
Engagement  
**+18%**

Purchase  
Intent  
**+15%**

Conversion  
Rate  
**+32%**

# Strategic Considerations Driving Growth for Healthcare & Pharma Brands

## Stand Out With Stories By Creating Relevance Through Trusted IP & Culture



### Why

80% of brand preference considerations are driven by emotional engagement<sup>1</sup>. Connecting with audiences through storytelling enables brands to stand out, create relevance, and build trust.

### How

Foster emotional engagement by aligning with cultural moments, showing up in their programming, and tapping into relevant influencers.

## Maximize Your Impact With A Diversified Video Plan



### Why

People are still using a combination of traditional and streaming platforms to view content (63%<sup>2</sup>). A video plan with both linear and streaming allow for incremental reach, a more strategic approach to targeting, and stronger performance against KPIs such as brand familiarity<sup>3</sup>.

### How

Leverage TV, inclusive of linear and streaming, in line with audience consumption behaviors and budgets to ensure optimal reach and increase action with commercial innovations.

## Continue To Grow By Creating Strong Connections With Multiculturals



### Why

Specific medical conditions and social determinants of health continue to disproportionately impact multicultural communities. This coupled with a renewed focus on health and an accelerated growth rate for drug companies, make these communities key audiences with whom to build trust and create awareness.

### How

Lead with Culture, Authentically Represent, and drive awareness, and education to build trust.

## Create Connected Plans With Data As The Foundation



### Why

Meeting the needs of the full patient-care network is increasingly important as healthcare becomes more complex. Personalization, message & premium content are tablestakes. *Fans of NBCU content are more likely to pay attention to brands that align with our content (+10%) vs. fans of non-NBCU content.*<sup>4</sup>

### How

Leverage a data-led and data-informed approach to ensure high audience quality match, messaging is aligned to objective (and audience need), and context is relevant to the audience and message.

Source: 1. Mediaprobe Emotional Engagement calculated based on Galvanic Skin Response (GSR) and Electrodermal Activity (EDA); 2. Hub Entertainment Research, Hub 2023 The Best Bundle, released April 2023; 3. NBCU Ad Impact Measurement Across Campaigns, 2017 - 2022, Average of Exposed vs. Control lift for measured NBCU campaigns. 4. NBCU Coherency LoveQuotient Study, 2022. Additional details in notes.

# NBCU Solutions for Delivering Brand & Business Impact for Healthcare & Pharma Brands

Source: 1. NBCU Ad Impact Database 2017-2022, EDO: Ad Multiplier = number of ad units required competitively to generate the same search volume as ads airing on NBCU; 2. NBCU Ad Impact Database 2017-2022; 3. Kantar Millward Brown 18mo Launch Period 4/15/20-9/30/21. Additional details in the notes.

## Stand Out With Stories By Creating Relevance Through Culture *Turnkey to Custom*

### Cultural Moments

Such as Cultural Heritage & DEI Celebrations, Premium Sports Events, & Awareness Months



### Trusted Content

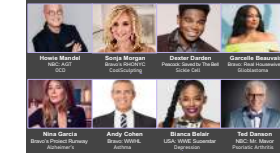
Integrations, sponsorships, contextual alignment in **passion areas** such as entertainment news, daytime, & reality



### Influencers

NBCUNIVERSAL

Talent who **personally identify with a condition or a situation** relevant to the brand & audience



## Maximize Your Impact With a Diversified Video Plan

### TV IS Linear And Streaming

#### Linear

Capturing attention achieving broad reach quickly and driving action  
**2.0 more pharma ads needed competitively to generate the same search impact<sup>1</sup>**

#### Data Driven Linear

Connecting with your key audiences in the content they are in, and optimized against your objectives  
**32% conversion rate for pharma<sup>2</sup>**

#### Peacock & Peacock AX

Reaching incremental audiences to linear with a tailored message in engaging, brand safe & suitable content with **capped ad load.**

#### Ad Innovations

Designed with Healthcare & Pharma in mind, offering opportunities to learn more, showcase branded content, and more.  
**14% lift vs. pre or mid roll<sup>3</sup>**

## Continue To Grow By Creating Strong Connections with Multiculturals

### Understand & Connect Via Culture'

Reach consumers in-language, connecting via cultural moments & passion pillars



### Authentic Representation

Genuine representation, and relevant storytelling via talent as trusted sources



### Build Awareness & Education

Purposeful activations via platforms that resonate and build trust with consumers



## Create Connected Plans With Data as the Foundation

### Audience Targeting & Automation

#### Media

- NBCU Streaming
- Local Media
- Data-driven Linear (DDL)
- Apple News

#### Activation

- Direct IO
- Programmatic
- Private Marketplace
- Via Local Spot On & Adsmart

#### Data

- NBCUnified
- BYOD
- Apple



## NBCUNIVERSAL PARTNERSHIP EXAMPLES

# How Our Partners Are Evolving Their Media Strategy & Storytelling



## Tapping into Sports Fandom

After opening a location in the UK, the Cleveland Clinic strengthened their partnership with the English Premier League by being the Summer Series Halftime presenting sponsor. Since then, they have become the official healthcare provider by having doctors on site at all EPL Summer Series matches.



## Amplifying Relevant Communities

Haleon/Voltaren partnered with NBCUniversal on a portfolio-wide initiative for National Caregivers Month. The partnership included high-impact in-show moments and custom vignettes in English and Spanish in order to create more widespread awareness of the caregiving community.



## Driving Audience Interaction

Moderna capitalized on driving education through local streaming with high-impact trivia and display units that aired on NBC Spot On. NBCU Local developed a streaming and digital strategy targeting key markets which generated the strongest results among their media partners.



## Leaning into Cultural Moments

Allergen (Allē) expanded its footprint and boosted brand awareness among Bravoholics by utilizing on-site BravoCon activations, OOH taxi placements, and ad innovations on Peacock—all leveraging Bravo IP.

# 2023 Healthcare & Pharma Industry Assessment

**NBCUniversal**

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Megan Ryan, Nikita Tolani

