

JANUARY 2024

Hot Topics for Healthcare & Pharma

GOING INTO 2024

NBCUniversal



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*Click on a
tile to jump
to that topic*



Impact of New
FDA Ad Rules



Tackling Mistrust
& Misinformation



Making Healthcare
Accessible



Keeping a Pulse on
Healthcare Chatter



Healthcare for the
Next Generation



Targeting
HCPs





Impact of the New FDA Ad Rules

What's Happening: The FDA implemented a new rule for prescription drug DTC TV*/radio ads requiring the side effects and contraindications to be presented in a clear, conspicuous, and neutral manner. The rule takes effect May 20, with full compliance by November 20.

Why To Watch: The new standards may impact media and creative strategies (e.g., unit length, ad innovations, channel approach).



Our legal team has experience working with Pharma advertisers and can assist in navigating the new regulations with NBCU.

*Note: As of date published, the term "TV" is vague
Source: [Federal Register](#)

The FDA established five standards

to determine whether the major statement is clear, conspicuous, and neutral



Information is presented in language that is readily **understandable by consumers.**



Audio information is understandable in terms of the **volume, articulation, and pacing used.**



For TV ads, the major statement must be presented in **dual modality**, concurrently using both audio and text.



For TV ads, the information in text must be formatted so it can be **read easily.**



The ad must **not include elements** during the major statement that are likely to **interfere with its comprehension.**



Tackling Mistrust & Misinformation

What's Happening: With AI and social media, misinformation is prevalent and difficult to identify. Positive perceptions of healthcare and pharmaceuticals are subsequently declining (-5pts and -7pts in 2023 YoY, respectively)¹ as consumers lose trust.

Why To Watch: Expect to see advertisers place more emphasis on brand safety and alignment with premium content to boost credibility.



Advertisers can align with NBCU's portfolio of premium content that consumers trust; viewers trust NBCU 19% more than short-form video.²

Sources: 1. [Gallup](#), August 2022-2023; 2. NBCU + Coherency Brand Love Research, 12/26/21/1/28/22; 3. [eMarketer](#), December 2023; 4. [eBioMedicine](#); 5. [KEF](#)

Consumers turn to online sources to self-diagnose, despite the potential for false information

4 in 10

U.S. adults have used **online information** rather than seek physician care³



82%

Of U.S. adults believe there's a prevalence of **false or misleading** health information on social sites³

For Multiculturals, misinformation can exacerbate existing health disparities



Flawed Data Collection

AI algorithms can at times, be **built on inequities, bias, and misinformation**, leading to poor models and mistrust for underprivileged patients⁴

~50%

of Hispanic adults **use social media at least 1x week** to gather health information, leaving Hispanics more susceptible to false information⁵



Making Healthcare Accessible

What's Happening: As consumers defer care due to costs and accessibility¹, new legislation aims to limit price increases on drugs and retailers are providing alternative healthcare solutions.

Why To Watch: Expect to see pharma brands push digital offerings with evolved targeting approaches to reach new audiences and connect with multicultural communities.



NBCU's interactive ad innovations can prompt consumers to take action directly via QR codes.

44%

of adults acknowledged they have skipped out on getting care **because they didn't have upfront cost information**¹

Legislation & retailers are providing solutions



Legislation

Effective early 2024, the **Inflation Reduction Act** will aim to limit price hikes to the rate of inflation²



Virtual Health

Brands are offering **online healthcare services** via memberships and discount pricing¹

Examples: Amazon Clinic, Costco, GNC Health



Upfront Costs

Brands are providing **transparent prescription drug pricing**^{1,3}

Examples: CVS, Amazon Pharmacy



Keeping a Pulse on Healthcare Chatter

What's Happening: Weight loss and women's health are increasingly becoming a part of the cultural conversation (*Google Search interest for weight loss and menopause each grew +19% YoY*)⁵, with an influx of weight loss drugs expected and women's health issues being addressed.

Why To Watch: Expect increased brand competition and media spending within these areas.



Partner with NBCU on thought leadership; NBCU's culturally relevant content can position brands at the forefront of the conversation

Weight loss drugs are expected to grow



15M U.S. adults are expected to be on obesity medications by 2030, when the **segment is projected to be worth \$100B**¹

Brands to watch:
Novo Nordisk's Wegovy; Eli Lilly's Zepbound

Addressing the gap in women's health



For every one woman diagnosed with a women's health condition, **roughly 4 go undiagnosed**²

Brands to watch:
Astellas, Midi (menopause)³; Ferring, Gameto (fertility)⁴



Healthcare for the Next Generation

What's Happening: The younger generation has a reactive approach to healthcare, and social media is their go-to destination for healthcare research. When deciding how to get care, convenience, flexibility, and understanding are of utmost importance.

Why To Watch: Expect to see advertisers test innovative ways to message Gen Zers where they consume healthcare information.



NBCU reaches 37M P13-24; Digital ad innovations provide a unique way to engage this audience





Targeting HCPs

What's Happening: Pharma marketers are shifting their strategies to target the full patient network and viewing HCPs as consumers. Precise targeting and tailored messaging become more important as HCPs face information overwhelm.

Why To Watch: Marketers can explore more effective ways to target HCPs within consumer environments and via tailored messaging.



NBCU's advanced targeting allows brands to connect with HCPs at scale and with precision in culture-defining premium content

Sources: 1. [MM+M](#), November 2023; 2. [IQVIA](#), March 2023; 3. NBCU First Party Data; 4. [IQVIA](#)

Pharma brands are planning to focus more on HCPs in the upcoming year

60%

of pharma advertisers said HCP insight is the **top priority** for strategic HCP engagement in 2024¹

HCPs are receptive to personalized messages

89%

of Healthcare Providers prefer **personalized interactions** with pharmaceutical companies²

CONNECT WITH HCPs as consumers, not just as professionals

While HCPs are consuming medical content, they are also watching...³



Sports



News



Drama



Next Best Action can help reach HCPs where they are⁴

Next Best Action is an advanced targeting approach that identifies how and where to connect with HCPs to drive effective omnichannel marketing recommendations, leading to up to 30% Rx uplift

Click [here](#) for more information on reaching HCPs with NBCU

Making Our Healthcare & Pharma Insights Work For You

CONTENT FOR FUTURE DISCUSSION & STRATEGIC LONG-TERM PLANNING

Trends

Industry Assessments, Hot Topics, Generative AI Implications for Pharma, The Importance of Multicultural Audiences, Health



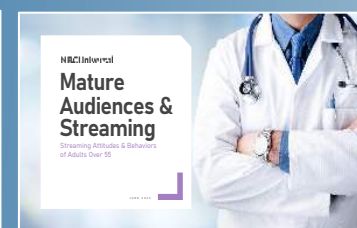
Thought-Leadership

4-Part Content Series (Mental Health, Social Determinants of Health, Accessibility, and Relationship to Healthcare), SDOH: Their Impact on a Culture of Health & The Role of Brands, Gen Z: An Exploration of What Creates Connection



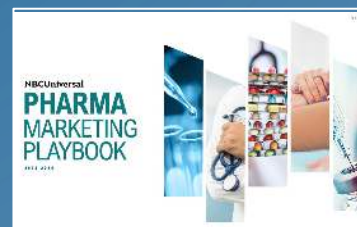
Marketplace & Advertising

The Power of Advertising, Older Audiences & Streaming: Attitudes & Behaviors; 23/24 UF Recap; Spanish Language Custom Pharma Study



Opportunity Areas

Caregivers Initiative, Pharma Marketing Playbook, Sharing DEI Commitments



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