NBCUniversal

The Health of Your Brand May Hinge on Wellness

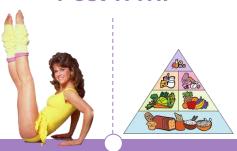
Key Considerations for Bringing Your Wellness Story to Life As 'Feeling Good' Becomes a Necessity and Not a Luxury

NOVEMBER 2022

Societal Shift

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

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.

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.









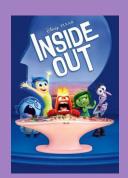




Yesterday

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







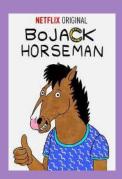












Today

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



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.

Sources: 1. Mintel

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 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 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" $\texttt{GLOBALCOSMETICS} \ \ \texttt{NEWS}$



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



"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

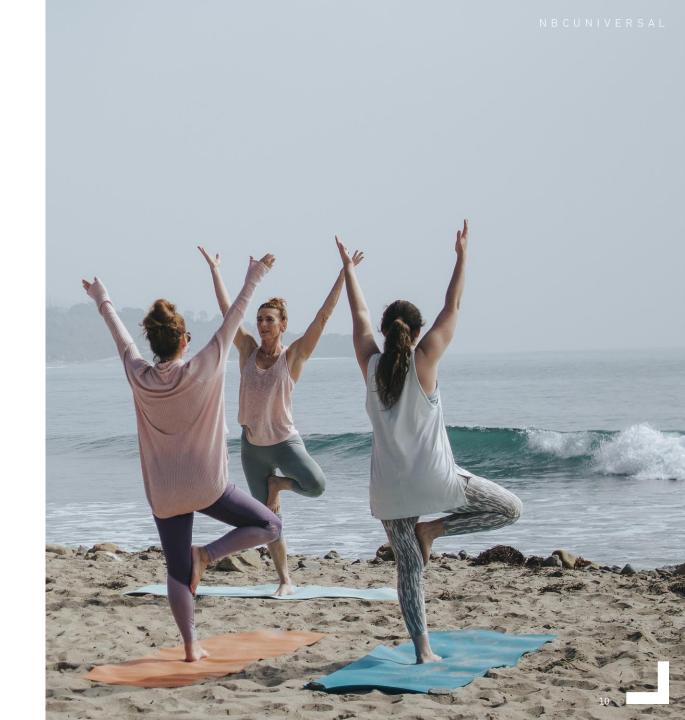
Employees expect wellness programs

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

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 wellnessoriented moments, programming, and events

03.

Engage

and reinforce messaging with strategic audiences 04.

Create

connection through wellness experiences

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

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.)

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

Create connection through wellness experiences

BRAND CONSIDERATIONS:

Collective excitement around inperson 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

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Thank You

For more information, please contact: **Gina Reduto:** Gina.Reduto@nbcuni.com

WITH CONTRIBUTIONS BY:

Adam Daniele, Caitlin Collins, Cynthia Jung, Nick Cafiero, Ben Cohen, David Curley, Meghan Valeriani, Andrea Illan

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