

Health 2030

How Brands Can Create Meaningful
Change through Health Innovation

dentsu health





Contents

Foreword

Disruption and Acceleration

Health 2030

Building Bridges

Crossing Boundaries

Forging Partnerships

Earning Trust

Foreword

Health is a universal need. It's global, yet we experience it locally and personally.

Last year **we were confronted with the impact of health inequality more than ever before** at both a domestic and international level. The World Health Organization (WHO) reports that the current rate of progress against the health-related Sustainable Development Goals (SDGs) set in partnership with the United Nations (UN) for 2030 is insufficient and that COVID-19 has slowed efforts further. ⁽¹⁾

At the same time, **the pandemic opened our eyes to the potential and true value of health's mission**, as we placed greater attention on the risks care workers are subjected to for the greater good and, out of necessity, we found ourselves pursuing new ways of receiving treatment.

By virtue of these efforts, we were reminded that **health innovation does more than power a multi-billion-dollar industry. It has the power to move us forward as a species and gives us hope for a better tomorrow.** It's bigger than wellness, treatments, prevention and even sickness itself. It's about the meaningful, educational and inspirational connections that are so necessary for all those traversing their own health journey, a journey that unites us as humans.

At the same time, we were also reminded that health progress can only occur when certain principles are made a priority by society at large and not just by those involved in the healthcare industry. In the same way that health safety depends on individual responsibility and ownership, **the greater struggle for improving the state of health and health**



equity rests on all the organizations that have the means to effect change. This creates a new landscape in which health concerns also become a priority for brands that exist outside traditional healthcare and, at the same time, established players need to broaden their reach and scope. How can these fundamental transformations be enabled and encouraged?

While the understanding of the complexities of the established ecosystem is still a fundamental requirement for health-focused organizations to thrive and champion meaningful progress, **the paradigm shift on the horizon, and the challenges it will create, demand a more agile and flexible mindset.** It's time for a new model that enables partners to tap into an unrivaled global network of thinkers and

dreamers to help navigate the unprecedented change that we are seeing in health and to rally behind one vision: for all to benefit from and thrive in the future of health. **We are dentsu health and we are bringing this new model to life.**

In this ebook, we will not only discuss how established healthcare industries are transforming as a result of recent events, but will also analyze the broader trends that will inform the priorities for health-focused organizations (established players as well as brands that are expanding their remit into wellness, lifestyle and all the sectors that are adjacent to health) in the next decade.

Through our insights into evolving consumer behaviors through to 2030, we will identify some key areas in which the adoption of a new model can enable brands to grow their business while at the same time contributing to the development of a healthier, more sustainable world.

Enjoy the read, we hope this is just the start of our journey together.



Matt McNally
Global President
dentsu health



Kent Groves, Ph.D.
Global Head of Strategy
dentsu health

Disruption and Acceleration

Over the past twelve months, we have seen dramatic temporary and permanent changes across all aspects of society. These shifts have caused accelerated transformations across the entire healthcare ecosystem and influenced consumer and patient behavior that will inform how brands need to rethink their approach to health over the next ten years.

Healthcare industries have been **disrupted**.

Providers had to pivot to tele-health.

Lockdowns and safety-oriented restrictions accelerated the adoption of telehealth and health diagnostic tools by providers, health care professionals (HCPs) and patients.

Pharmaceutical brands could no longer access HCP offices.

The inability to rely on sales representatives networking with physicians put pressure on manufacturers to improve the B2B customer experience.

Payers had to navigate an ever-changing environment.

Constantly evolving coverage requirements, extended Rx fills and changing government policies created a very complex landscape for payers trying to meet consumer and employer expectations.

Patient and consumer behavior has changed:

Treatment consistency was overlooked.

Regular check-ups, elective surgeries as well as chronic disease maintenance and treatment have been deferred.

Lifestyle disruptions worsened health conditions.

Primary care physicians have acknowledged a dramatic 85% worsening of mental health, 31% increase in addiction and 37% of chronic conditions getting “noticeably worse.” ⁽²⁾.

Health has become a cross-industry brand imperative.

Every brand is now a health brand and will need to identify how it can enhance the well-being of its customers through its products and services.

The crisis highlighted disparities in health access.

The virus showed “the different conditions in which we live because of social structures that are inequitable, both within the United States and between countries.” ⁽³⁾

A close-up photograph of a person's hand interacting with an Apple Watch. The watch is on the person's wrist, and their other hand is touching the screen. The watch face shows the time 5:42, a calendar event for 12 from 5:00-6:00 PM, a location for Apple at 1811 William Street, and a weather forecast of 17 degrees. The background is a blurred blue and white surface.

**our health is the most important asset we have
as human beings. it's something that connects
us all. we need to build a future where all can
benefit from and thrive in health.**



Case Study

The work we delivered to our client **Harvard Pilgrim Healthcare** is exemplary of how disruption forced brands to adapt and deploy new marketing strategies.

In true 2020 fashion, the pandemic began just as we started planning the 2021 Annual Enrollment Period (AEP21), which added unforeseen challenges to the campaign. We knew that seniors were among the most vulnerable population and currently experiencing isolation from family and friends, fear of getting sick and a heightened awareness around healthcare that included questioning levels of coverage, as well as cancelling or rescheduling doctor appointments.

We helped design and implement a go-to-market strategy with a best-in-class campaign that capitalizes on historical learnings, is grounded in data and analytics to inform key decisions and continues the test/learn/apply feedback loop to realize wins in real-time and ensures efficiency. The goals were to realize the same level of marketing spend investment as last year, generate an equal number of new members YoY and identify shopping seniors in the digital ecosystem. ***Audiences were reached via an omni-channel approach*** including direct mail, paid search, cost-effective digital platforms (i.e. display, social, prospect email), meeting promotions in print media and lead nurturing efforts.

Cost-per-lead dropped by 32% YoY. Digital media was strategically expanded to identify shopping seniors in the digital ecosystem and results proved that the digital interest was high with 40% (8k) of display responses. ***Membership increased 7.5% in comparison to last year.***

As the lines separating healthcare, wellness and lifestyle continue to blur, broader consumer trends will inform the imperatives that will enable health-focused brands to differentiate and contribute to progress as we march towards the 2030 objectives established in the SDGs.

These forces will inform the **evolution of consumer behaviors** through to 2030: (4)

Universal activism

Consumers will reward the brands that are committed to societal values and take concrete action to improve the human condition. Being able to address audiences invested in meaningful causes will be key to building relevance.

Synthetic society

Artificial products will set new standards for 'normalcy', but also create the risk for greater inequality. Consumers will reward brands that democratize technology enhancements, especially if they are focused on well-being.

Bigger bolder brands

Consumers will select key 'Titan brands' to become an integral part of their everyday lives, transforming our perceptions of customer loyalty and brand choice. Amazon and Alibaba are 'Titan brands' in the making.

The human dividend

Society will celebrate what it is to be human, recognizing the limits of technology. Embedding and nurturing human skills and traits across a customer base and workforce will become a dominant brand value.

Health brands, in turn, will need to focus on these **imperatives:**

Building bridges with the right audience

As notions of identity become more fluid, the data space will undergo a paradigm shift and companies that are able to drive targeted media campaigns while being respectful of consumer privacy and industry regulations will gain competitive advantage.

Crossing boundaries through R&D

The proliferation of apps and devices dedicated to self-healing and self-monitoring will continue. Traditional healthcare brands will invest in them to gain broader consumer access and appeal, while lifestyle brands will begin blending into the healthcare space and compete with established players.

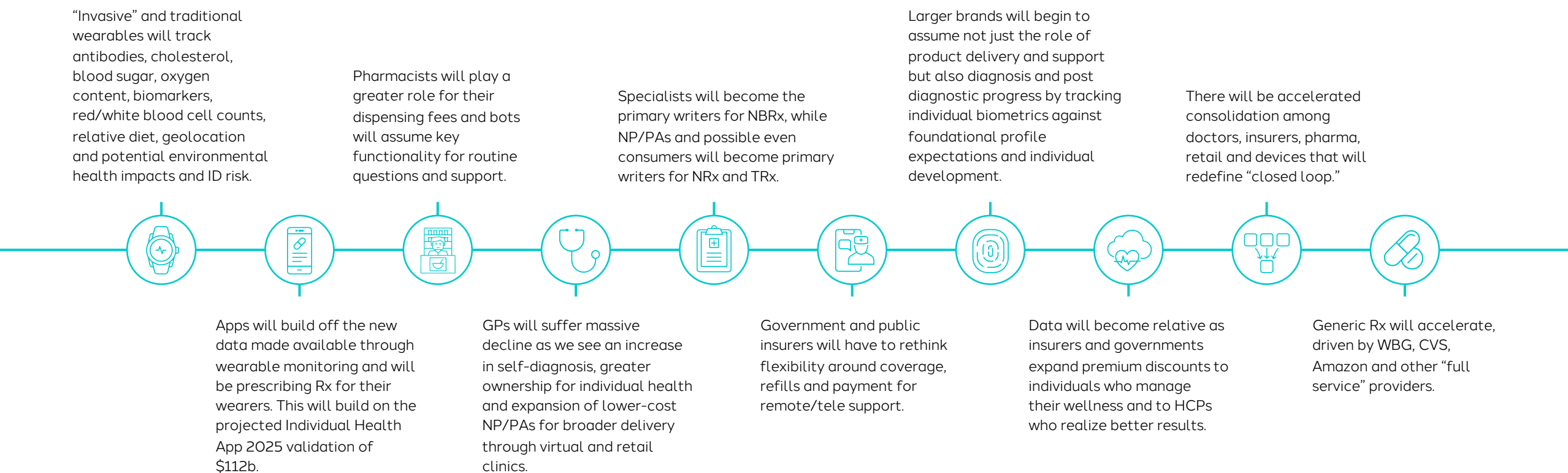
Forging partnerships across the ecosystem

Health brands will need to integrate their products and services within the Titan brands' ecosystem, but also forge partnerships in order to provide end-to-end experiences that encompass diagnosis, coverage, retail and treatment in order to compete with them.

Earning trust with personalization

Health care providers and payers will need to invest in educational customer experiences that allow individuals to familiarize themselves with plans, diseases and therapeutics, while at the same time being able to detect the inflection points where a human interaction is expected and warranted.

FIGURE 1:
The disruptions driving the “rethink”
of healthcare delivery





Building bridges

with the right audience

The health remit for brands has expanded.

The pandemic has changed the expectations consumers have when they look at brands. Unsurprisingly, clarity about measures taken to ensure the health and safety of both customers and employees has consistently been at the top of initiatives consumers expected from brands across all verticals throughout the crisis. ⁽⁵⁾

At the same time, **awareness of the local and international impact of health inequality has grown.** For instance, our research shows that in the fall of 2020, Black and Hispanic consumers in the U.S. were more likely to say that the health threat to their communities was still getting worse. ⁽⁶⁾

Overall, **our perception of the role brands should play in addressing societal needs has evolved:** 70% of consumers say they are more likely to support brands that respond to social injustice. ⁽⁷⁾ It is now an imperative for health-focused brands to champion meaningful progress and take concrete action for the greater good, while at the same time pursuing their business goals.

Creating relevance has become more challenging.

Whether it's educating the public regarding a disease, a treatment or a coverage opportunity, encouraging them to participate in a charitable cause or generating awareness for the challenging conditions in which care workers carry out their mission, **health-focused brands must seek the partnership of audiences** that become invested in these initiatives in order to make the greatest possible impact.

Creating relevance with the right audience is becoming increasingly challenging for brands. This is due in part to the fact that the demographic attributes advertising has traditionally relied on are becoming obsolete: two out of three 18- to 24-year-olds believe traditional concepts of identity will be redundant by 2030. ⁽⁸⁾

Naturally, **this challenge is also reinforced by a fundamentally transformed media landscape.** There are now more than 200 streaming services, many of which provide consumers with ad-free entertainment options. In this context, it's even more important that every audience interaction is extremely timely and targeted.

Data privacy revolutionizes how audience connections are built.

As their social remit grows and the separation between healthcare and wellness is reduced, **health-focused brands need to seek relevance** by targeting individuals while **going beyond the limited notion of 'patient audiences'.**

Last year provided a valuable lesson on the importance of sharing information for the greater good: 75% of consumers would consider sharing their health data with governments to prevent a pandemic. ⁽⁹⁾ However, audience definitions for health-focused brands are problematized by the regulatory implications of protected health information (PHI) across domestic and international jurisdictions.

This fits within a broader, ongoing transformation in the collection and usage of consumer data. Privacy-oriented legislation, such as the GDPR in Europe, HIPPA in the U.S., APPI in Japan as well as the deprecation of third-party cookies by players such as Google, are revolutionizing the ad tech space and driving a **paradigm shift towards first-party data-based addressability.** In order to create meaningful connections with the right audience, brands need to prepare for this.



How We Can Help

Identity-led Audience Targeting

As 'mass marketing' opportunities are becoming less frequent, harnessing data about consumers and their behaviors – not only as patients – is necessary in order to produce targeted and personalized ads to increase awareness in health-related initiatives. Thanks to the enterprise identity management platform Merkury, we enable brands to build owned identity graphs, which securely collect and resolve customer identifiers. Our identity resolution capabilities leverage first-party data, enrich it with robust data attributes that provide a comprehensive view of the consumer and manage audience information in privacy-safe 'clean rooms', enabling brands to target the right audience while complying to privacy regulations.

Case Study

We helped **Ascensia Diabetes Care** promote CONTOUR®NEXT ONE, their blood glucose monitoring system, with a digital approach to speak to modern health consumers and HCPs. **The goal was to retain customers, prevent attrition and grow market share** with limited resources.

We launched a digital- and patients-first campaign based on sophisticated audience segmentation created with **a mix of data, research and an audience-first planning and buying activation across all media channels**.

We delivered improvements in media efficiencies, **lower cost per impressions (80%)** and **decreased click costs (45%)** through SEO efficiencies, keyword optimization and continuous ad copy refresh making the campaign a success story in diabetes management.



Crossing boundaries

through R&D

Innovation in wellness-focused technology will continue to accelerate.

As a result of self-healing trends accelerated by the recent lockdowns, **manufacturers are more motivated than ever to explore health-related innovation** and fund research and development for applications and devices that consumers can use to improve their wellbeing.

In the 2020s, we'll see a widespread adoption of synthetic enhancements and virtual experiences that improve our health and beyond. A recent survey shows that 44% of consumers think that we should be able to use drugs and technology to improve ourselves, even if we are healthy. ⁽¹⁰⁾ **Expectations of personal health and wellbeing goals will inevitably rise** in a world in which technology makes self-improvement increasingly accessible.

However, by 2030 only a small subset of the population will be able to afford some of the more advanced biological and technological benefits available. ⁽¹¹⁾ **Brands that are not successful in democratizing wellbeing-focused innovations may alienate their customers** and contribute to health inequality.

The lines between industries will keep on blurring.

This focus on health-related research and development will cause a chain reaction that will drive brands belonging to different industries to compete like never before.

We are starting to witness intersections between services provided by different healthcare sectors, for example insurance companies offering telehealth services traditionally delivered by HCPs. Pharmaceutical manufacturers are more and more often competing with white label brands owned by retailers, a trend that will accelerate as online marketplaces continue to invest in the health space.

In the future, B2B manufacturers traditionally focused on the development of equipment used in professional medical facilities may start producing consumer-ready iterations of their products for home use. At the same time, lifestyle and consumer technology brands are starting to reach beyond their traditional remit and develop products or acquire businesses to offer wellness options like meditation apps, exercise tools and specialized equipment to support people with disabilities.

Brands will need strong identities to stand out.

As brands traditionally categorized within established healthcare industries enter new territories and launch products and sub-brands intended to have a broader consumer appeal, they need to **abandon the constructs of industry-specific marketing and past playbooks**.

At the same time, lifestyle brands that venture in new directions and start developing health-related offerings need to **acquire the expertise required to navigate complex industry regulations, policies and compliances**.

More exposure to content and offers across multiple channels and more time at their disposal drove 75% of U.S. consumers to change their shopping habits and try new brands in 2020. ⁽¹²⁾ As the proliferation of digital assets to which consumers are exposed increases and industry categorizations become less relevant, **shoppers are going to reward brands that offer a consistent and engaging experience of their products and services**. This can only be accomplished by bringing together experts from different disciplines and integrating powerful, effective and fresh thinking.



How We Can Help

Brand Strategy and Experience

We combine research and consumer insights with inspiration and creativity to determine brand position and architecture and develop go-to-market strategies and content. Our teams collaborate with clients across all industries to design brand system guidelines, as well as visual and verbal identity systems to ensure that new and established products are primed for success and contribute to engaging and immersive brand experiences.

Case Study

By assisting efforts in brand positioning, category definition, naming, verbal and visual identity systems, photography art direction and brand system guidelines, we helped **Pendulum** showcase its scientific backing and its role as a medical pioneer, opening a new frontier in human health. We helped **tell the trailblazing story** of using sequencing technology to map microbiomes and fundamentally change the way we understand the role bacteria plays in our health. **Pendulum branding stands proudly in the microbiome space** and represents the harmony between the body and the bacteria it needs.



Forging partnerships *across the ecosystem*

Few 'titan brands' will be trusted by consumers as one-stop shop lifestyle enablers.

While consumers have become more empowered with the increasing choice to select brands on their own terms, **the progressive focus on convenience and customer experience is going to enable a select few brands that excel in both to become 'titan brands'** that will address an increasingly wider array of consumer needs. In China, for example, 4 in 10 consumers would consider using a single company for all their lifestyle needs, such as shopping, financial services and healthcare. ⁽¹³⁾

These select brands will provide a full breadth of services while posing an existential threat to brands that don't adapt. As a result, **consumer expectations for established healthcare brands will evolve** based on factors outside of health, like time, expense and convenience.

Cross-category consumer brands with a focus on wellbeing will become major competitors in the health space, shaping customer expectations for a more rounded and seamless end-to-end experience of how products and services, including treatment, are accessed.

The 'Amazonification' of health is imminent.

In healthcare, we will witness something similar to the ongoing "Amazonification" of retail we are experiencing today. In fact, Amazon itself – along with similar brands in size and completeness of offering such as Alibaba – is a very credible candidate to become a 'titan brand'.

\$376 billion will be spent on Amazon in the U.S. in 2021, a full \$300 billion above the closest competitor in retail ecommerce. ⁽¹⁴⁾ Given these figures, one can imagine what a transformative effect will occur as Amazon continues to invest in the health space, a process that began with the pilot launch of Amazon Care in 2019 and is rolling out across the U.S. in the summer of 2021.

Experts predict the 'Amazon Effect' will shape the "future of hyper-personalization in healthcare marketing." ⁽¹⁵⁾ Provider and service networks, health insurers, immediate care clinics, telehealth, retail and mail-order pharmacy, electronic medical records, audience segmentation and profiling and third-party vendor profiling and engagement capabilities are all areas Amazon is currently pursuing.

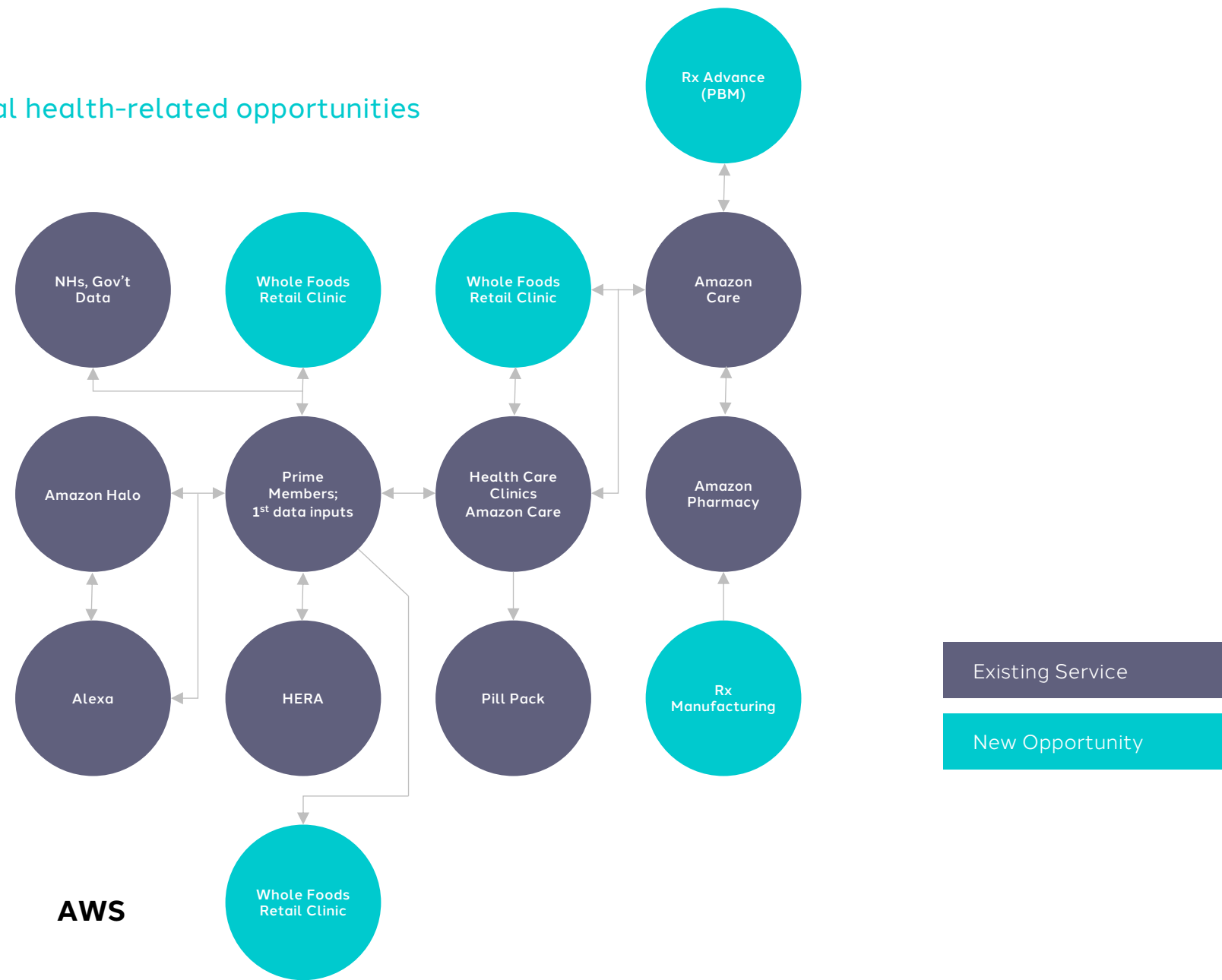
Developing and optimizing ecosystem capabilities will become critical.

As in retail today, **Amazon** will not only focus on selling its own health products and services but **will function as a network retailer for specialized vendors**. Health brands that succeed in the next ten years will be those that understand how to create and optimize relationships with titan brands.

However, relying on a single retailer may limit their opportunity for growth. **Health-focused brands will need to forge partnerships among a variety of joint ventures**, so that their products and services are featured in a number of marketplaces comprised of pharmacy retailers, HCPs, payers and pharmaceutical manufacturers, coming together **to offer an end-to-end experience that is competitive with 'Amazonified' consumer expectations**.

The first step is investing in the capabilities needed to measure the impact of marketing efforts across channels, brands and platforms to both optimize current omnichannel initiatives as well as maximize the performance of third-party selling partnerships in the future.

FIGURE 2:
Amazon’s existing and potential health-related opportunities





How We Can Help

Retail Marketplace Consultancy

From logistics assistance to pricing and retail advice, to building and refining optimized media plans, this solution helps health-focused brands navigate the world of online retail and build, improve and evolve their relationship with online hubs such as Amazon. We help brands stand out and elevate their unique value proposition by uncovering untapped opportunities across digital advertising, retail and customer service. Our consultants use proprietary and third-party tools and technologies to conduct audits that deliver thorough, measured and actionable recommendations to optimize brands' performance across the entire ecosystem.

Case Study

We helped a **large U.S. pharmaceutical manufacturer** enhance its Rx impact measurement capabilities to keep up with an ever-changing landscape of marketing to professionals. The solution is a **robust advanced analytics omnichannel measurement framework** that is proactive and prescriptive to provide a continuous read on performance, enabling real-time customer, channel and tactic optimizations. **The brand moved from 2x-per-year reporting to real-time measurement capability**, enabling the agility necessary in the rapidly changing marcom environment for a full array of analysis subcomponents including sequencing, triggers, suggestions and Non-Personal Promotion (NPP) deep dives.



Earning trust

with personalization

Self-serve enablement and support will become critical.

The blurring of industry lines and the ‘Amazon effect’ will contribute to accelerating the adoption of digital capabilities within health-focused brands, looking to meet consumers’ growing expectations for convenient, engaging and relevant customer experiences.

Born out of necessity, the standards set in the last year for telehealth and remote care will become the norm and will inform **the proliferation of online educational content about prevention, diseases, treatment and coverage** delivered by health brands that will be expected to migrate a growing portion of the care experience onto channels **accessed in a self-serve capacity**.

In order to deliver these experiences effectively and efficiently, **health brands will need to implement best-in-class technology platforms** that can manage customer interactions carried out across multiple channels. These interactions will often occur in a stop-and-go fashion as health-related self-serve activities will become more frequently matrixed with other aspects of our day-to-day lives, from shopping and work to entertainment and time spent with our loved ones.

The orchestration of human interactions will create brand differentiation.

Harnessing data and capturing insights out of these interactions is going to be the key to ensuring consistency and relevancy in the overall customer experience. Leveraging Customer Data Platforms (CDPs), health brands can unify multiple data sources, informed by regional jurisdictional data governance and compliance across the entire enterprise system architecture and, ultimately, deliver personalization at scale.

Sophisticated experience orchestration will become even more of a differentiating factor for brands in the future. As the world becomes increasingly more automated and virtual, human skills and interactions will become a dominant brand value. ⁽¹⁶⁾ Health-focused brands, especially HCPs and insurers, will **need to be able to detect the inflection points in the customer experience when a human interaction is advised or expected**.

Optimizing technology platforms that provide AI- and machine learning-powered journey orchestration capabilities will separate brands that can manage the moments that matter from those that don’t.

B2B and B2C customer experience personalization will be equally important.

Delivering personalized experiences that target other constituents within the health ecosystem, such as HCPs or partner organizations that manage a different aspect of the health journey, will become a priority for health-focused brands on par with the personalization of consumer-facing experiences.

This is exemplified by **the transformation of Non-Personal Promotion (NPP) that is occurring today**. Historically, NPP was considered a complementary tool used to reinforce the face to face or “personal” efforts of the sales force. Recently, however, as more and more marketers move towards a customer centric approach, leveraging targeted segmentation and algorithms predicting what is the most appropriate communication to send to an HCP, NPP has truly become personal.

Trigger-based marketing, or next best action, will be the key to ensuring the right message about the right product or initiative is received at the right time by the right people within the select organizations the health brands are partnering with to effect meaningful change.



How We Can Help

Journey Orchestration

The goal of a total customer experience is to manage a successful decisioning program that operates by means of next best action selection and delivery to each customer. Using AI algorithms, journey orchestration helps brands develop processes that are contextual, timely, consistent and relevant to create the best outcome available. Thanks to years of experience implementing market leading customer experience platforms, we are able to optimize journey orchestration capabilities to meet health brands' unique personalization needs.

Case Study

One of the world's largest medical device manufacturers needed a solution to combat a 35% drop out rate for new patients. We developed a white glove customer service and concierge experience that supported the patient through their first 90 days of product use and beyond. By leveraging our Salesforce partnership, we developed a multi-tech solution that incorporated curated web content, email, live chat, phone, and video support via an interactive portal with personalized support. In the past year, **the portal saw over 119k users interact** with the service, **65% of which were new patients or non-users** seeking more information. With a **78% retention rate** post-usage, the brand protected several million dollars in Lifetime Value, resulting in an 210% ROI. .



We partner with brands to achieve meaningful progress as a force for growth and good in health. We create world-class solutions and services that unlock new opportunities for growth and transformation across the entire health journey.

Bringing a new model to life:

With our unique ability to assemble a global and/or local team, your brand strategy and message will be guaranteed quick, powerful, effective and transformative thinking. Simply put, you will gain efficiency and flexibility by moving from Agency of Record model to an Agency on Demand, powered by our Teaming platform and radical collaboration.

Interdisciplinary and cross-industry consultancy:

Dentsu health removes barriers and brings diverse capabilities and different discipline experts together, orchestrating them around our clients' needs, maximizing market velocity and growth opportunities with the creation of truly differentiated experiences that are sensitive to the contextual, regulatory and societal changes that may occur along healthcare journey.

Committed to good:

At dentsu, our mission is to be a champion for meaningful progress and a force good – with and for our people, clients, consumers and communities. As a modern marketing solutions company, we understand and value the significant role that we play in creating positive change, progressive policies and representation.

Visit: dentsuhealth.com



- (1) [World Health Statistics 2020. Monitoring Health for the SDGS](#)
- (2) <https://www.hfma.org/topics/news/2020/11/chronic-conditions--other-health-issues-have-worsened-during-the.html>
- (3) <https://www.hsph.harvard.edu/news/hsph-in-the-news/covid-19-pandemic-highlights-longstanding-health-inequities-in-u-s/>
- (4) https://www.dentsu.com/us/en/reports/vision_2030_executive_summary_asset
- (5) [Dentsu COVID 19 Recovery Navigator: September 17th, 2020 Edition](#)
- (6) [Dentsu COVID 19 Recovery Navigator: September 17th, 2020 Edition](#)
- (7) [Together We Thrive. Dentsu Diversity Equality and Inclusion report, May 2021](#)
- (8) <https://consumervision.dentsu.com/consumer-vision-2030/universal-activism>
- (9) <https://consumervision.dentsu.com/consumer-vision-2030/universal-activism>
- (10) <https://www.foresightfactory.co/>
- (11) [Dentsu, Digital Society Index survey, 2020.](#)
- (12) <https://www.zdnet.com/article/mckinsey-three-factors-drive-consumer-loyalty-in-the-next-normal/>
- (13) <https://consumervision.dentsu.com/consumer-vision-2030/bigger-bolder-brands>
- (14) <https://www.emarketer.com/content/amazon-dominates-us-ecommerce-though-its-market-share-varies-by-category?ecid=NL1001>
- (15) <https://www.pm360online.com/expect-amazon-to-accelerate-its-healthcare-positioning-in-three-key-areas/>
- (16) <https://consumervision.dentsu.com/consumer-vision-2030/the-human-dividend>

Contributors:

Matt McNally, Global President, dentsu health
Kent Groves, Ph.D., Global Head of Strategy, dentsu health
Jack Boitani, Content Lead, dentsu
Kelly Kirkham, Content Specialist, dentsu