



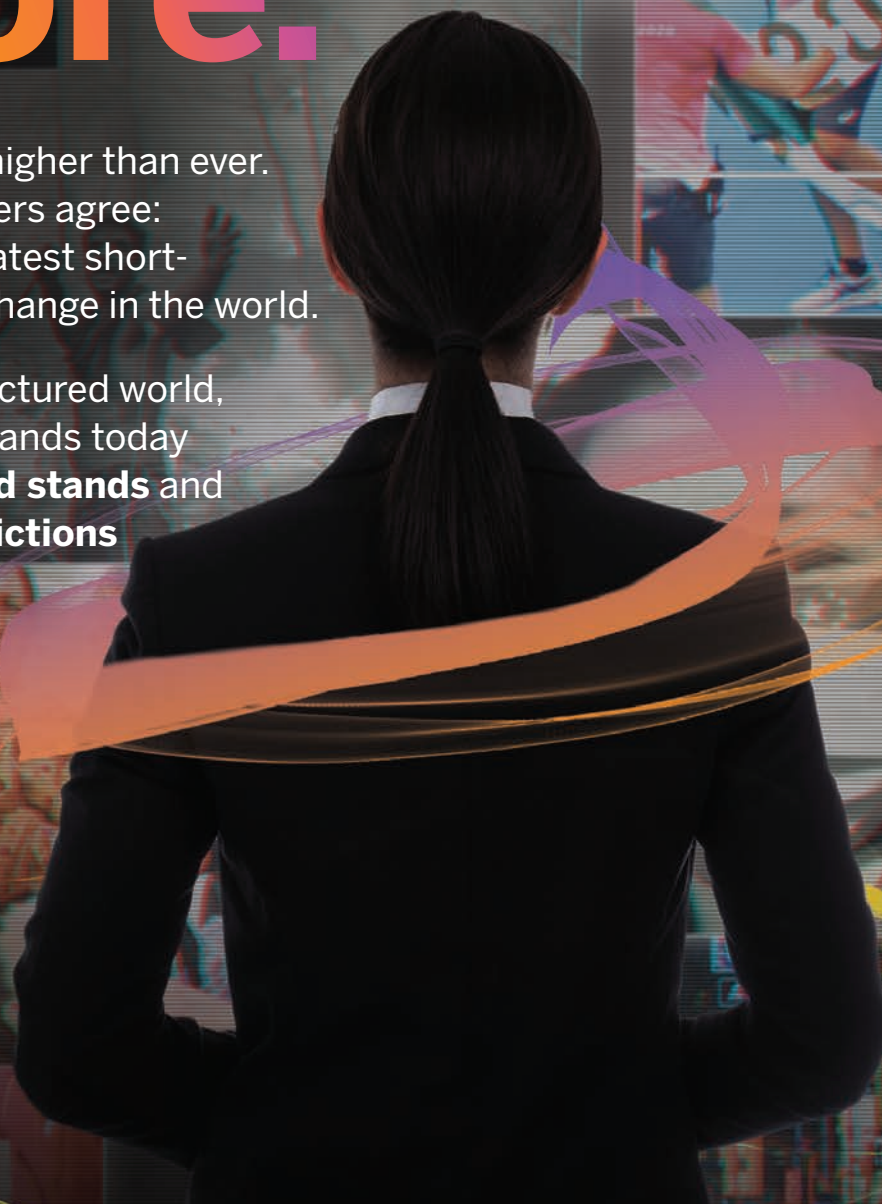
Brands  
in **Motion**

The Healthcare Mandate:

# Fear Less. Do More.

Expectations of health brands are higher than ever. Consumers and B2B decision-makers agree: The health sector can have the greatest short- and long-term impact on positive change in the world.

However, in a fast-changing and fractured world, pleasing everyone isn't possible. Brands today must have the **bravery to take bold stands** and the **tenacity to act on those convictions** over the long term.





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## Executive Summary

We are at an inflection point. The global pandemic, accelerating climate change and social tensions are transforming our lives at warp speed.

Audiences tell us that they have the highest expectations of brands working in the health sector. When asked which industries will have the greatest impact on tackling societal issues and promoting positive change in the world, the response was definitive — industries in the health sector stood apart from all others. But when asked if health sector brands already are making an impact, audiences' responses remained flat compared to 2018 and 2019 data. There is a contradiction here: Audiences want brands to help, but haven't seen any evidence that brands are delivering.

Most health companies are inherently purpose-led and taking direct action on issues that are important to their stakeholders, but many don't share their stories out of concern that doing so will open them up to criticism. But health is inextricably linked to all the social issues our audiences rated as important for brands to address. Now is the time to communicate and engage — to fearlessly share your work as part of a health community.

**The Healthcare Mandate, a WE Brands in Motion report**, finds that the brands that will flourish in 2021 and beyond are the ones with the courage to take bold actions and take a strong stance with the full understanding that not everyone will approve. The 2021 study surveyed consumers and B2B decision-makers (including health professionals and purchasers) to develop a data-driven analysis that will help brands tap into that courage and build enduring legacies that can withstand the test of time. It provides the tools to create a purpose platform consistent enough to ground the brand, flexible enough to evolve with the times, and clear enough to navigate the inevitable unknowns.

Audiences expect health brands to make an impact on social issues in the near term. The time for health brands to step up is now.

# Key Stats

30%

The number of consumers and B2B decision-makers expecting brands to **create stability in uncertain times** rose by 30% since 2019 — putting them on par with schools and friend-and-family networks.

Nearly three out of four want brands to make multiyear investments in causes but also reassess their corporate policies at least **every six months**.



52%

Despite expectations that health sector brands will contribute to positive change in the future, brands' perceived impact for societal good in the present remains flat, and 52% say that brands that take stances on societal issues are just **trying to sell more products or services**.

**The top three issues** for a health sector brand to address to be considered a purpose leader are unequal access to healthcare and health services, employee well-being and the mental health crisis.



41%

Local leads over global. Forty-one percent expect brands **to focus on making local communities better** versus 5% who prioritize global issues, with 44% saying brands should do both.

# A Revolution

Every year that WE has published a **Brands in Motion report**, audience expectations of brands have risen. With the report in its fifth wave and over 90,000 collective survey respondents, expectations still increased. Significantly.

From 2019 to 2021, the expectation for brands to create stability in uncertain times rose by **30%**. Brands are now as important a pillar of society as educators and friend-and-family networks. That's right: The brands that people purchase their vitamins and sanitary products from or access telehealth services through now have the same clout as their schools and family members. And every day, consumers and B2B decision-makers vote with their wallets and their budgets. **Two out of three respondents** say they are more likely to purchase or recommend products or services from brands that address societal issues that matter to them.

That's the good news. The tougher news is that consumer and B2B stakeholders are increasingly skeptical and even cynical. Despite rising expectations, brands' perceived impact for societal good remains flat, and 51% say that health sector brands that take stances on societal issues are just trying to sell more products or services.

**Audiences want brands to help**, but they aren't yet convinced that brands are delivering. The task ahead for brands: Bridge this disconnect.



## Both consumer and B2B audiences are highly attuned to purpose-washing and will call out an insincere or misguided campaign in a heartbeat.

In some ways, the movement to lead with purpose is a victim of its own success. With more players labeling their work as purposeful, the competition is much stronger. Some brands are doing this extremely well and setting a high bar. However, many other companies are hopping unthinkingly on the purpose bandwagon, and we are seeing a proliferation of ill-considered campaigns that leave much of the audience feeling jaded and cynical.

...it's essential that brands are rooted in their own values and are clear about what they stand for

**Bottom line: Purpose is now a must-have,** and it impacts a brand's immediate commercial outcomes and its long-term legacy. It determines not just which brands will stay viable in the next few years but in the decades to come. That's why it's essential that brands are rooted in

their own values and are clear about what they stand for — even if part of the audience doesn't want to hear it. They must then ground those statements in long-term, quantifiable action. General pledges and promises won't cut it. "In solidarity" social posts won't help. When you try to please everyone, you satisfy no one.

### Case Study: BIONTECH

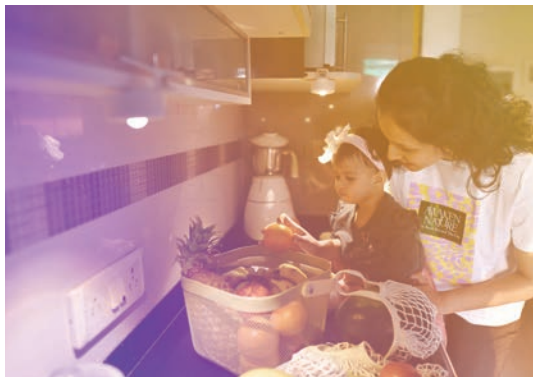
In January 2020, an article in the Lancet about a new virus in Wuhan, China, inspired BioNTech CEO Dr. Ugur Sahin and his business partner and wife, BioNTech's Chief Medical Officer, Dr. Özlem Türeci, to engage their employees in a new purpose — to use their full technology and immunotherapy expertise to help address the COVID-19 pandemic emergency. BioNTech's aim was clear: Make a potential vaccine available to as many people as possible, as quickly as possible. Days after first reading about the new coronavirus scientists at the company set to work on what they called Project Lightspeed. Less than 12 months later the first COVID-19 vaccine was available for use. This speedy response was possible because BioNTech built on its core brand promise: tech-enabled immunotherapies.



# A Divided Audience

**The good news: Two-thirds of stakeholders are open to brands speaking and acting on societal issues.** The bad news: One-third think brands should not weigh in.

You will never carry the whole room, a fact clear to anyone who has ever sat in a focus group. That's why **it's critical that brands partner with key stakeholders** — employees, customers, community members — to clarify and develop long-term goals and enduring values. Instead of starting with the expectation of winning 100%, or defaulting to saying nothing, talk to those who want to engage.



## Purpose Patrons.

**36%** Purpose has a high influence on purchase and advocacy.

## Matters to Me.

**29%** Take a passively positive view on purpose overall — except for issues with personal relevance, where they are especially vocal supporters or detractors.



## Purpose Cynics.

**35%** Believe it is not the role of brands to comment or act on societal issues.



# Expectations of Health Brands

Brands in Motion respondents see health sector industries as the best positioned to tackle pressing societal issues and drive positive change in the world in the near term.

Why? The pandemic highlighted the innovation of the industry, and now scientific advancements beyond vaccines are drawing more attention than ever. **There is a newfound recognition of the association of the health sector with all social issues** and an understanding that healthcare delivery and the health of our environment are closely tied.

Health is linked to every social issue Brands in Motion respondents rated as important for brands to address:

<b>Gender equality</b>	Women’s health issues, opportunities for women to enter careers in STEM
<b>Racial equality</b>	Inclusion in clinical trials, equitable access to genetic testing and personalized medicine
<b>LGBTQ+</b>	Transgender health
<b>Waste reduction</b>	Issues of waste within health systems
<b>Climate change</b>	Pollution leading to respiratory issues, changes to ecosystem resulting in new viruses
<b>Sustainable farming and fishing</b>	
<b>Water conservation access</b>	Access to affordable nutritious food and clean water
<b>Food insecurity</b>	
<b>Economic outcome and risk of global recession</b>	Vaccine nationalism, medical supply issues, economic hardship, mental health
<b>Political turbulence</b>	Impact of financial and political insecurity
<b>Employee personal needs</b>	Mental health, health insurance
<b>Human rights violations</b>	Legal access to abortion
<b>Digital inequality</b>	Navigating increasingly digitized health systems
<b>Health inequalities</b>	Link between deprivation and poorer health outcomes
<b>Social isolation</b>	Increased risk of dementia, mental health issues and premature death from all causes



## Winning Over the Cynics

Clearly, the health sector is well suited to tackle social issues across the board. It is up to individual companies to decide where they have permission to play, commit to act for the long term, communicate regularly and reassess the strategy often.

The Brands in Motion data shows that the audience expects brands to focus on issues relevant to their sector. For example, in the health sector, “access to health” and “mental health care” are priorities. Whereas in the tech sector, “digital inequality” rose to the fore. In other words, **build on, not away from, your core brand promise.** You also need to listen to your stakeholders. Eighty-three percent of respondents said brands should listen to stakeholders to decide what issues or impacts to address.

**Building an authentic purpose legacy means moving away from instant gratification of a hot take tweet or flash campaign** and instead making meaningful long-term investments in the issues stakeholders care about most. Investments that get buy-in from the entire organization are regularly reviewed and measured.

Getting this right in the health sector is critical. **Healthcare professionals and payors feature prominently within our “purpose cynics,”** the 35% of people who think it is not the role of brands to comment or act on societal issues. Fifty-three percent of health B2B decision-makers fall in this group.

There is something of a contradiction here: Audiences expect the health sector to have the greatest impact on positive change in the world in the next six months and yet are cynical about motives. Our view on this: Do the right thing because it is the right thing to do, not because you want a standing ovation for doing it.

# The Celebrity CEO Effect

Now that executives like Microsoft CEO Satya Nadella and Janssen's Managing Director of Australia, New Zealand's Biljana Naumovic and Boehringer Ingelheim UK Managing Director Uday Bose, are speaking out in a very personal way — and doing so frequently — they have changed the audience's expectations. **Seventy percent of respondents say executives should convey their personal positions to at least one of five different audiences** (employees, social media, customers, shareholders or the media) with very high frequency — from “almost constantly” to every three months.

Many health sector executives are uncomfortable with this demand, and they have a point. Historically, healthcare brands have been reticent to speak because it can open them up to criticism. Take a stand on issues of deprivation and health inequality and commentators may ask why the price of your drug is so high, for example.

C-suite executives who show the courage to communicate frequently and with authenticity — rather than via committee-written platitudes — will stand out as leaders

Delivering quality products and services is absolutely the place where brands must start, but the leaders who believe that communicating on societal issues only means revealing a brand's vulnerabilities are missing a key point: The majority of the audience wants to hear it.

To those CEOs concerned about making a mistake: Don't worry — you will. Whether it's publicly supporting a politician later exposed for unethical conduct, or misunderstanding the perspective of a less privileged group — mistakes happen. Especially in this fast-moving world, you can't know everything all the time. The issue is less about the gaffe than the response. To maintain long-term trust, executives need to be vulnerable and own their mistakes immediately. Again, the audience is sophisticated. They know the difference between a sincere apology and corporate damage control and will forgive the former.

# Strength From Within

Constituents today don't just want to hear about brands' bold purpose initiatives, they want to be part of the conversation. **Eighty-three percent** said brands should listen to stakeholders to decide what issues or impacts to address, and **71%** say brands have an obligation to engage with social/global issues when they impact the business and stakeholders.

The most important audience for health brands? Not patients or healthcare professionals, but employees. A brand won't have influence until its employees are on board. If employees don't share a brand's values and interests, they won't give the organization buy in, and the purpose initiatives will fall flat. Employees can either be a brand's most influential evangelists or devastating critics.

## Case Study: AstraZeneca

Given how engaged AstraZeneca has been in the fight against COVID-19, it was vital that it didn't just focus on external audiences. Employees were an equally important stakeholder. AstraZeneca implemented a testing program across all sites to protect employees, as well as ensure the uninterrupted delivery of medicines. Onsite employee uptake of PCR tests grew from an average of 30% in May to around 70% in December, with positive user experience ratings of 99%. This award-winning initiative delivered impressive outcomes with infection rates on average 10 times lower than external rates.

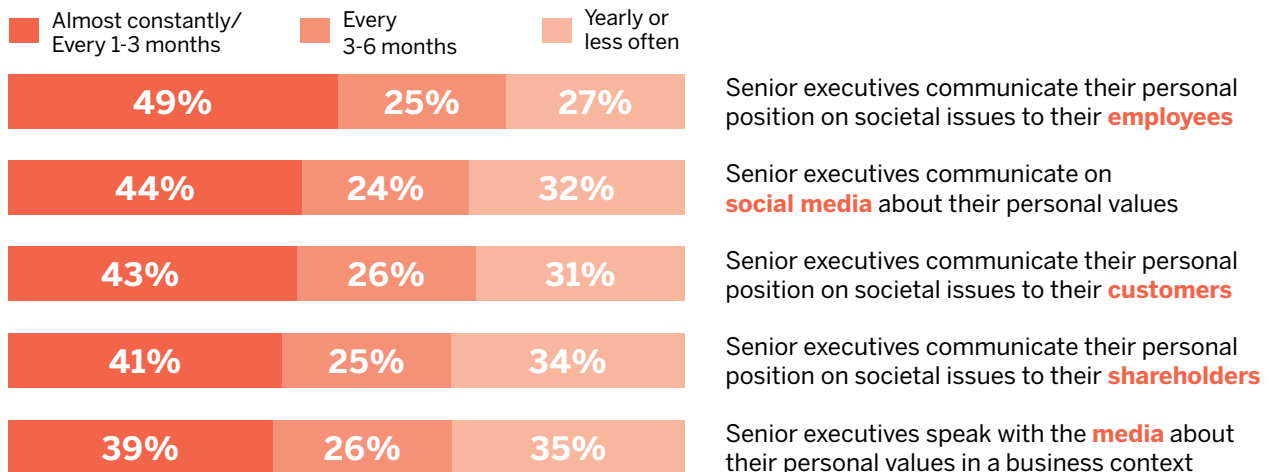
Sometimes engaging with your employees means engaging on **behalf of your employees**. In May 2021, AstraZeneca CEO Pascal Soriot felt compelled to defend the team behind the COVID-19 vaccine in the face of criticism. "People are just trying to do their best," he told the FT. "They're just trying to produce a vaccine to save lives. It's that simple. And then, to be criticized every day, sometimes fair criticism, sometimes by armchair generals who have opinions about everything, is really disheartening."





## The Executive Pulse

Ideal frequency of senior executive communications



Figures may not sum to 100% due to rounding.

**This is particularly true in the health sector, where employees have direct relationships with stakeholders unlike any other industry.** Members of the sales force, MSLS, professional relationship managers, patient advocacy managers, market access teams, R&D scientists and beyond are all acting as ambassadors every single day.

Across most sectors, employee well-being and personal needs (physical, mental, financial) rated as the most important issue to engage in to be considered a purpose leader.

The task for brands is not simply to attract and maintain talent, but to ensure that the people who work for them feel good about the company, their contributions and the brand's larger purpose and that they are able to demonstrate this to their stakeholders. **Respondents rated employees as the group executives need to communicate with the most** (over customers, shareholders and the media). Seventy-four percent said executives should communicate with their employees about their personal position on issues at least every six months.

Senior executives should also look to their staff when considering which issues to focus on. In addition to the strong majority wanting brands to consult stakeholders before determining what issues to address, **87%** said brands have a moral obligation to engage with societal issues when it impacts their employees.

Bottom line: Before brands try to save the world, they must ensure their own organization is in order. You can't run a mental wellness campaign if your managers are sending emails at 3 a.m. You can't fight homelessness or hunger if your front-line workers can't make ends meet. **Purpose starts at home.**

# Local Priorities

Respondents expressed a significant interest seeing brands tackle local issues. **Forty-one percent say brands should focus on making their local communities better** versus **5%** who say brands should tackle global issues, with **44%** saying brands should do both.

Unlike centralized global brands, many healthcare companies have substantial in-market salesforces and service departments whose job it is to understand local people and local issues and think critically about how the brand fits into that community. **This combination of expertise, local investment and feedback loops with local stakeholders makes healthcare brands uniquely positioned to address local issues.**

If you want to see the future, look in your own backyard.

People are looking for tailored initiatives that put greater emphasis on local needs that reflect their lived experience. They showed a strong preference for concrete purpose-based initiatives that they can see, feel and touch. When asked the most impactful actions for brands to engage on in the next three to six months, there was a clear preference for concrete actions, such as “investing in technology” or “partnering with educational institutions.” The actions they were least impressed with: “Monetary donations,” “Facilitate dialogue across divided groups” and “represent underserved groups in advertising.”

Passive or superficial purpose initiatives won't cut it. Sustainability pledges that won't come due for decades aren't nearly enough. The people in your community need to see the impact of your actions with their own eyes.

## Case Study: reckitt

Reckitt has engaged in a multiyear mission to improve the health and hygiene of communities in India, where 750 million people live without access to basic sanitation, and more than 120,000 under the age of five die from diarrhea and respiratory infections annually. Reckitt has provided a skill-development training for sanitation workers, and Reckitt brand Dettol launched a hand-washing curriculum for schoolchildren. After the COVID-19 crisis hit, Dettol donated product care packages to 150,000 NHS workers and donated media space to the government to support its vital public health announcements.





## Engineering an Enduring Legacy

To be a leading voice on social issues of importance, **58% of respondents say brands must comment very frequently** — at least weekly and in some cases almost constantly.

But wait: Rapid-fire social media responses, tweeted in the moment of hot-button headlines, are exactly what get so many brands into trouble.

Being impulsive isn't brave. Chasing the latest turbocharged news meme isn't brave. Bravery requires determining what you stand for and making deep and sustained investments that back up those values. Stakeholders want constant communication, but they also expect brands to build those purpose platforms on a strong record of focused, long-term investment. Seventy-two percent said they would rather see brands make long-term investments in one issue or cause rather than switch causes each year.

Becoming a leader on societal issues is both a marathon and a sprint

This does not mean picking a cause and letting it run its course. **Nearly three out of four stakeholders say brands should reassess their communications** in light of social issues at least every six months.

Becoming a leader on societal issues is both a marathon and a sprint. It requires the agility to respond to events in real time, and the endurance to maintain sustained, long-term commitments.

The health sector is better positioned than any other to make significant short- and long-term impact on the societal issues consumers and B2B decision-makers care about most — if brand leaders have the courage to stand up. The mandate is clear: Fear less, do more.

# Appendix: Brands in Motion Methodology

The **WE Brands in Motion** report is a worldwide study of how perceptions shift over time conducted by WE and YouGov. Now in its fifth year, Brands in Motion has surveyed **90,000+** consumers and B2B decision-makers about their attitudes regarding:

- Expectations for brand actions and investments
- Forces affecting the market on a macro level
- Expectations for purpose initiatives
- Industries

## **WE Brands in Motion report 2021: The Bravery Mandate**

- 2021 Total respondents: 8,353
- Evenly split between consumers and B2B decision-makers

YouGov conducted the Brands in Motion global study using an online interview administered to panelists who had agreed to take part in surveys. Respondents to the survey were 18 years of age or older, did not work in advertising/PR/marketing/market research, and were qualified to rate one of the categories based on purchase history and purchase intent. A total of 8,353 responses were collected across eight markets between May and June 2021.





## Eight markets:

### US/EMEA

United States: 1,053

United Kingdom: 1,073

Germany: 1,058

South Africa: 1,030

### APAC

Australia: 1,033

China: 1,012

India: 1,040

Singapore: 1,054



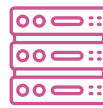
## Eight categories



Computing Devices



Consumer Technology



Enterprise Technology



Finance/Banking



Health & Wellness



Health Technology



Prescription Health



Food & Beverage

# Demographics

## Consumer

Male: 44% (N=1,927)

Female: 56% (N=2,470)

Gen Z (18-24): 19% (N=854)

Millennials (25-39): 21% (N=919)

Gen X (40-54): 23% (N=1,026)

Baby Boomer/Silent (55+): 37% (N=1,598)

## B2B

Male: 56% (N=2,229)

Female: 44% (N=1,728)

Gen Z (18-24): 12% (N=473)

Millennials (25-39): 47% (N=1,872)

Gen X (40-54): 27% (N=1,083)

Baby Boomer/Silent (55+): 13% (N=528)

# Your Brand in Motion

Our world is constantly changing. Brands in Motion reports provides data-driven tools that will help you develop the agility to respond to disruptions and the stability to build an enduring legacy.

**To learn more about Brands in Motion or find out about Brands in Motion events in your area, contact WE:**

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**Audiences expect health brands to make an impact on social issues in the near term. The time for health brands to step up is now.**

**WE** | Brands in ***Motion***

The world,  
your brand  
and your stories are in motion.

**WE helps you go the distance.**

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