

KETCHUM

2023

HEALTHCARE  
COMMUNICATION  
TRENDS



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# METHODOLOGY



## What is the aim of this project?

Our research aims at identifying trends that will shape the healthcare sector in the near future. Our objective is to help industry players clarify confusing communications around healthcare issues.



## Specific questions

- What are the most significant trends currently influencing the healthcare industry?
- What trends will have the most influence on the healthcare industry in the coming years?
- How can industry players optimise their communication strategies to make the most out of current and future trends?



## Research process

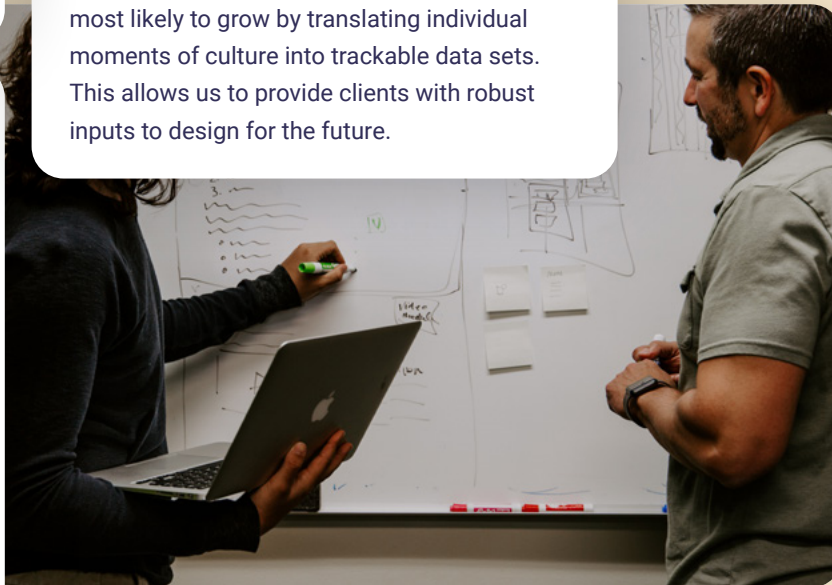
Our research was conducted using Ketchum's proprietary tool, Q™. Q™ is a cultural intelligence platform powered by artificial intelligence. It was designed by Sparks & Honey to help clients identify, organise, and quantify cultural trends.

Using Q™, we can forecast which trends are most likely to grow by translating individual moments of culture into trackable data sets. This allows us to provide clients with robust inputs to design for the future.



## Period covered

January 2020 –  
December 2022



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# EXECUTIVE SUMMARY

Healthcare is changing and it is changing fast. The COVID-19 pandemic revealed the cracks and inefficiencies in the system, but it has also shown how a clinical, financial, and operational transformation is possible.

We identified **three major trends** that will guide the healthcare sector in building a solid new model for the future.



## Digital transformation

Digital technology will drive innovation and help the healthcare sector improve efficiency and democratise access to care.



## Rebuild trust

The mistrust in medical science experienced during the pandemic will require healthcare companies to reinvent themselves and partner with players within and outside the healthcare space to restore public trust in science.



## Diversity and equity of care

Diversity -- both in the medical community and in the scope of treatments offered -- should be an integral part of a new and more equitable system.



Against this backdrop, we expect the following five elements to shape the healthcare sector in the years to come:

## TECH INVESTMENT IN HEALTH



## DIGITAL HEALTHCARE TRANSFORMATION



## TECHNOLOGY AS THE GREAT EQUALIZER



## GEOPOLITICAL HEALTH INEQUALITIES



## COLLABORATION AT THE CORE



# 1

### Tech investment in health

The healthcare industry has seen a massive wave of investment and innovation. Newcomers from the technology, telecom, and consumer industries are entering the sector with disruptive solutions.

# 2

### Digital healthcare transformation

Digitally enabled care is at the heart of the transformation of healthcare. Digital healthcare presents opportunities for greater remote patient care through telehealth. Behavioural health improvements can be obtained through coaching and gamification.

# 3

### Technology as the great equalizer

While the pandemic amplified disparities, it also ushered in a surge of digital transformation. In the health commodity space, digital tools and approaches can help streamline supply chains and provide better data to prevent or address supply shortages when they occur. At the same time, messaging platforms and texting apps may improve access to reliable health information by connecting communities to trusted sources. To reduce health inequity, we must make technology work harder.

# 4

### Geopolitical health inequalities

Some countries have advanced healthcare systems that are affordable and available to all patients. Other parts of the world, especially developing countries, have less advanced healthcare systems, and millions of people struggle to access care. Lack of access to healthcare, whether for financial or other reasons, contributes to millions of premature deaths each year.

# 5

### Collaboration at the core

The magnitude of the COVID-19 pandemic has highlighted the need for public-private partnerships like never before. We must think and act as one global society.

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# NAVIGATING THE CURRENT HEALTHCARE LANDSCAPE

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# NAVIGATING THE CURRENT HEALTHCARE LANDSCAPE

## An industry in evolution

The global population is getting older.<sup>1</sup> This requires a re-evaluation of old-age policies as ageing populations place a strain on healthcare and social care services, with a fallout on the economy.

As the proportion of people over the age of 65 increases, there is increased demand for innovative products and services that support fitness and health, resulting in a **booming wellness sector**. From architecture to workplace practices, people look for ways to integrate wellness into their everyday lives, often through a wide range of AI-powered goods and services such as fitness trackers and health apps. AI and smart tools that monitor human behaviour are becoming more sophisticated and paving the way for more predictive services<sup>2</sup> that enable new ways of interacting with our environment. That could ultimately improve patient outcomes. For example, healthcare organisations use predictive analytics

to identify which hospital inpatients are likely to exceed the average length of stay and those at high risk of hospital readmission. These insights allow clinicians to adjust ward care protocols and patients' post-hospitalisation treatment while limiting healthcare costs.

Healthcare delivery models (HCDMs) have picked up on these technology-driven trends and are attempting to respond accordingly. These efforts have increased during the pandemic when social distancing measures forced many providers to employ virtual care technology to deal with patients remotely. At the same time, hospitals and health systems have been turning to technologies such as cloud computing, 5G telecommunications, virtual reality (VR) therapy, 3D printing, and interoperable data and analytics to address current challenges and build **digitally powered care models** for the future.



1. <https://www.who.int/news-room/fact-sheets/detail/ageing-and-health>

2. Models that help identify patients who are at risk of developing certain conditions based on the analysis of current and historical healthcare data.

The reasons underpinning the creation of innovative tech devices or the implementation of non-traditional techniques, such as the use of video games to combat chronic pain, are manifold: technological progress, high cost of care, and the growing aversion to opioids due to their addictive nature.

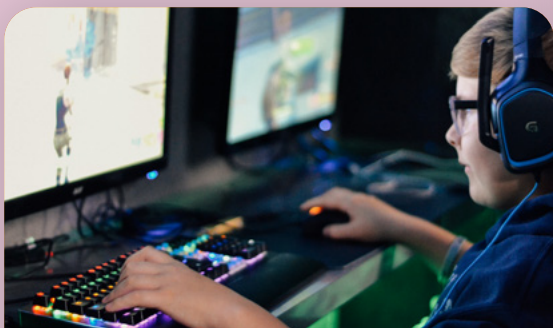
At the same time, the internet is reaching the most remote parts of the world and driving conversations around the need to **close the 'digital divide'** – that is, the gap between people who do have access to modern information and communication technology and those who do not.

While expanding access to the internet can hugely benefit underserved communities around the world, it also presents some downsides. These include unhealthy behaviour and the risks related to being constantly connected, the growing power of internet platforms and what that means for our privacy, and the effect that the unregulated use of the internet can have on society.





# TECH IN HEALTHCARE



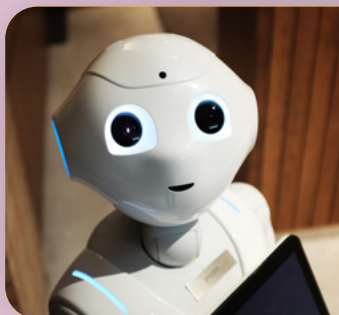
## Video game prescription

Akili Interactive develops prescription-only video games that deliver sensory and motor stimuli engineered to treat conditions like attention deficit hyperactivity disorder (ADHD), autism, depression, and multiple sclerosis (MS).



## VR to alleviate treatment

Oncomfort offers an innovative digital sedation method which combines clinical hypnotherapy and integrative therapeutic techniques through virtual reality (VR). Used in hospitals and clinics, treatment methods involving virtual reality are now quickly segueing into the home and senior centre market where VR programs enhance physical therapy, help combat acute and chronic pain, and potentially address a variety of mental health challenges, including post-traumatic stress disorder (PTSD).



## Robots to improve healthcare

Novanta Inc. announced a new partnership with MassRobotics to develop advanced solutions in medical/surgical robotics and improve robotic productivity. As a non-profit organisation, the robotics firm has become an innovation hub for robotics and connected devices.



## Constant connection

The omnipresence of the internet in even the most private aspects of our lives raises concerns over the long-term effects, especially on our mental health. From early in the morning until late at night, we are exposed to multiple screens, news broadcasting, and image overload. Access to information has been democratised and simplified, but with many potentially harmful consequences.

When taken to extremes, our overdependence on our devices can become an addiction and cause anxiety. So-called 'smartphone addiction' may be manifested through phenomena such as the *phantom vibration syndrome* – the perception that one's mobile phone is vibrating or ringing when it is not – and the *repetitive refresh syndrome* – the need to constantly refresh the internet feed.



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## Super apps

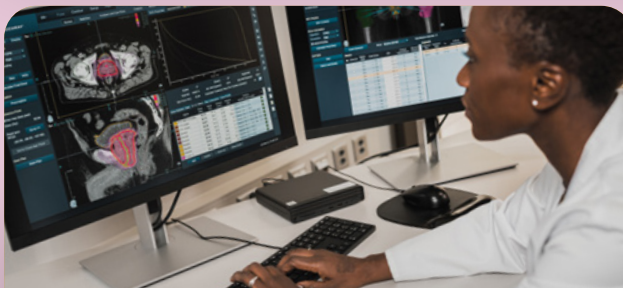
In recent years, consumers have become increasingly reliant on platforms and ecosystems that can meet their demands all at once. That has resulted in a handful of tech monopolies that grow even more powerful as they enter sectors like education and health. All of this has driven privacy concerns over the intrusive nature of such players and the way they leverage users' data to lock them in and reinforce their addictive behaviours.

At the same time, lawmakers struggle to keep up with the rapid pace of technology advancement. Outdated regulations fail to provide an adequate legal framework for new products, services, and activities while new laws are hindered from coming into effect due to complex regulatory and legislative processes.



### Battle for India's super app

Shrouded in secrecy, some of India's biggest conglomerates, retailers, banks, and aggregators are capitalising on the growing app fatigue to deliver all-inclusive digital experiences to consumers. Such 'super apps' are aimed at monopolising loyalty and spending power by consolidating features and services across fashion, tech, healthcare, travel, and many more.



### Facebook healthcare

Facebook has been creeping into the healthcare space for years through a series of projects that have not garnered much attention. The strongest signal of Facebook's interest in healthcare was hiring Freddy Abnoui, a Stanford University professor and cardiologist to guide the company's ambitions to impact public health.<sup>3</sup>

3. <https://www.fastcompany.com/90606044/facebook-health-tracker-wearable>



## Social impact

The spread of social networking platforms has given like-minded individuals the possibility to find each other from all over the world. Algorithm-based services help users gather around **digital fireplaces** built on common interests, shared identities, and enthusiastic fandoms. This system has brought people together and empowered minority groups that had little or no voice in mainstream media.

However, the opportunity to engage almost exclusively with people that share the same values and convictions can lead to **radicalisation and polarisation**, often fuelling conspiracy theories and misinformation in so-called echo chambers. A consequence of this behaviour is decreased trust in institutions and global organisations.

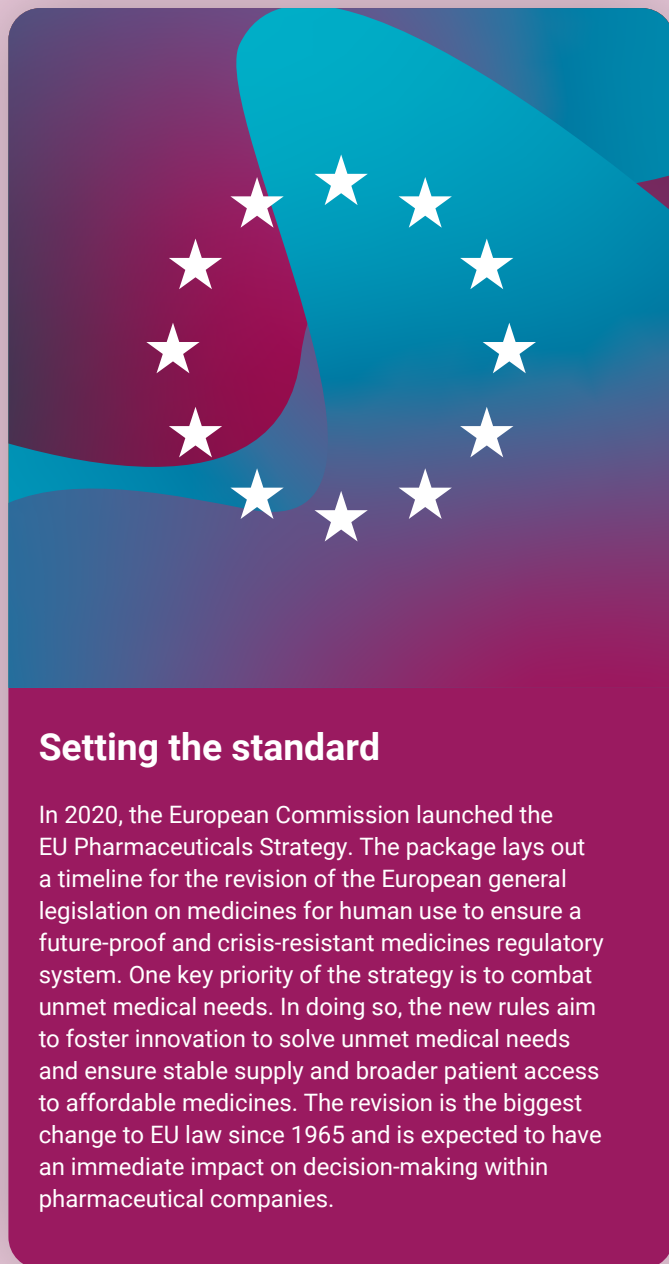
According to the 2021 Ipsos Global Trustworthiness Monitor, only 31% of respondents globally consider pharmaceutical companies trustworthy – ahead of banking, oil and gas companies, public services, and the government. In Belgium, trust in pharmaceutical companies is as low as 22%.<sup>4</sup> Conversely, people consider their immediate networks as more trustworthy sources for advice, news, and support. The 2021 Edelman Trust Barometer shows that 76% of people globally trust ‘my employer’ to do what is right, significantly more than business (61%), NGOs (57%), government (53%) and the media (51%).<sup>5</sup>



### Medical misinformation spreads fast on social media

Misinformation on the COVID-19 vaccine spread rampantly on TikTok, where it is easy to scroll and be met with a rapid-fire onslaught of videos. Regardless of different content creators’ intentions, these videos reached millions of views despite the platform’s efforts to combat medical misinformation.

4. <https://www.ipsos.com/sites/default/files/ct/news/documents/2022-01/ipsos-global-trustworthiness-monitor-is-trust-in-crisis.pdf#page=45>
5. <https://www.edelman.com/trust/2021-trust-barometer>



## Setting the standard

In 2020, the European Commission launched the EU Pharmaceuticals Strategy. The package lays out a timeline for the revision of the European general legislation on medicines for human use to ensure a future-proof and crisis-resistant medicines regulatory system. One key priority of the strategy is to combat unmet medical needs. In doing so, the new rules aim to foster innovation to solve unmet medical needs and ensure stable supply and broader patient access to affordable medicines. The revision is the biggest change to EU law since 1965 and is expected to have an immediate impact on decision-making within pharmaceutical companies.

## A new moral code

The easy access to a vast amount of information through the internet has allowed **greater scrutiny** of institutions and big corporations, often revealing their flaws and contradictions. A growing sense of mistrust in authority and national leadership has led people to disengage with public life, with few or no initiatives to reverse the trend from the same authorities and leaders. Furthermore, younger generations – Millennials and GenZ – have become increasingly critical of current industry models. In response, companies are beginning to search for solutions that can protect their brand reputation while acknowledging and addressing the social and environmental issues that matter to consumers.

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# Growing polarization

Since the 2008 international financial crisis, the world has seen rising **backlash against globalisation**. Many citizens and politicians have opportunistically seized the counter-narrative of putting their country first and amplified this message through social media channels. Online platforms have proven again a powerful tool for politicians or public figures to disseminate fake news, disrupt democracy, and feed polarisation. In this context, people have embraced more extreme opinions which they rely on to define their identity and feel compelled to defend the status quo for fear of losing control over their lives.



## Anti-vax on strike

In early 2022, anti-vax protesters took to the streets of Europe to protest against mandatory COVID-19 vaccine requirements. Groups as large as 100,000 engaged in weekly protests in many European capitals calling for freedom of choice and claiming unfair treatment of the unvaccinated. Protesters justified their vaccine hesitancy or outright refusal with a lack of trust in science (vaccine safety and efficacy) as well as distrust of mainstream parties and governments.

# INDUSTRY TRENDS

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# INDUSTRY TRENDS

The scope and persistence of the COVID-19 pandemic exposed vulnerabilities in national public health systems and impacted many countries' ability to effectively respond to the crisis. Many disease surveillance, outbreak management, and tracking systems have proved inadequate for the scale of the pandemic. However, the COVID-19 crisis also showed how a clinical, financial, and operational transformation of the global healthcare system is possible.

How will this change occur? Which players will be involved? What can healthcare companies do to seize this opportunity for transformation? We identified **six industry trends** that will shape the healthcare sector in the near future.



TREND 1:  
**Perceptual  
diversity**



TREND 4:  
**Icon  
toppling**



TREND 2:  
**Taboo  
toppling**



TREND 5:  
**Ancient  
wisdom**



TREND 3:  
**Flattening**



TREND 6:  
**Tangible  
intangible**

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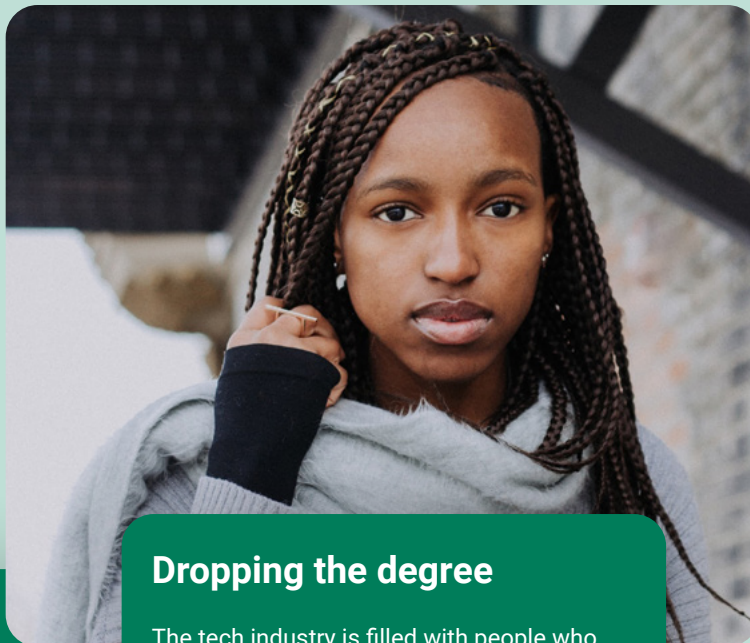


## TREND 1

# PERCEPTUAL DIVERSITY

People are beginning to hold institutions accountable for their lack of diversity and mistreatment of minority groups. On a societal level, we are also beginning to understand the value of and prioritise having different perspectives.

In the same way, healthcare companies are requested to – and held accountable for – ensuring health equity, starting with diversity in clinical trials. In turn, companies are searching for solutions that help them adapt to changing societal norms such as increased emphasis on Diversity, Equity and Inclusion (DEI) policies.



### Right to reparations

New Zealand is decades ahead of other countries in dealing with its colonial past. Over the years, the New Zealand government has launched initiatives to improve the health situation for Māori people. These include the establishment of Māori healthcare providers to increase access to healthcare for indigenous people, and the cultural safety education training provided to nurses and midwives to ensure that professionals consider the cultural, historical, and political context of each patient when providing care.<sup>6</sup>

### Dropping the degree

The tech industry is filled with people who have similar personal and often professional backgrounds. As the sector expands, economists cite the lack of diversity as reinforcing inequalities in the sector. To overcome the issue, the Boston-based health platform Ovia Health has dropped the degree requirement for entry level positions to diversify their staff and gain a competitive advantage in the sector.

6. <https://www.hqsc.govt.nz/resources/resource-library/a-window-on-the-quality-of-aotearoa-new-zealands-health-care-2019-a-view-on-maori-health-equity-2/>



## TREND 2

# TABOO TOPPLING

The general public is embracing previously stigmatised behaviours and conditions such as mental illness. Since the COVID-19 outbreak, there has been growing recognition of the importance of mental health. According to some experts, the universal experience of uncertainty associated with a global pandemic left many people struggling with similar emotions. This shared experience has improved people's knowledge of mental health and how it impacts everyday life. As a result, we have reduced stigma around mental illness and less talked-about health conditions.<sup>7</sup>

## Getting Louisiana's vote

Social-justice advocate Gary Chambers released a risky campaign advertisement in which he smokes cannabis. The aim was to address marijuana reform policy along with voter right concerns. That was particularly important in a state like Louisiana where arrest rates for cannabis possession are disproportionately higher among people of colour.<sup>8</sup> Gary's objective was to destigmatise cannabis use rather than to promote the behaviour.

## Spreading sanitary awareness

Dr. Simranjeet from Ludhiana, Punjab, India, takes up the taboo of menstruation by providing information on safe menstrual hygiene practices and sanitary products. In India, periods are considered impure and menstruating women are often discriminated, for example being excluded from social and religious events or denied entry into places such as temples and even kitchens. A study by UNICEF found that 71% of teenage girls in India remain unaware of menstruation until they get their first period. When they do so, many drop out of school. With over 150 girls reached so far, Dr. Simranjeet hopes to expand her activism across Punjab and destigmatise conversations around menstruation.



7. <https://news.syr.edu/blog/2022/10/10/mental-health-stigma-has-weakened-but-theres-still-more-work-to-do/>

8. <https://www.forbes.com/sites/tomangell/2020/04/20/on-420-aclu-highlights-racist-marijuana-enforcement-in-new-report/>



## TREND 3

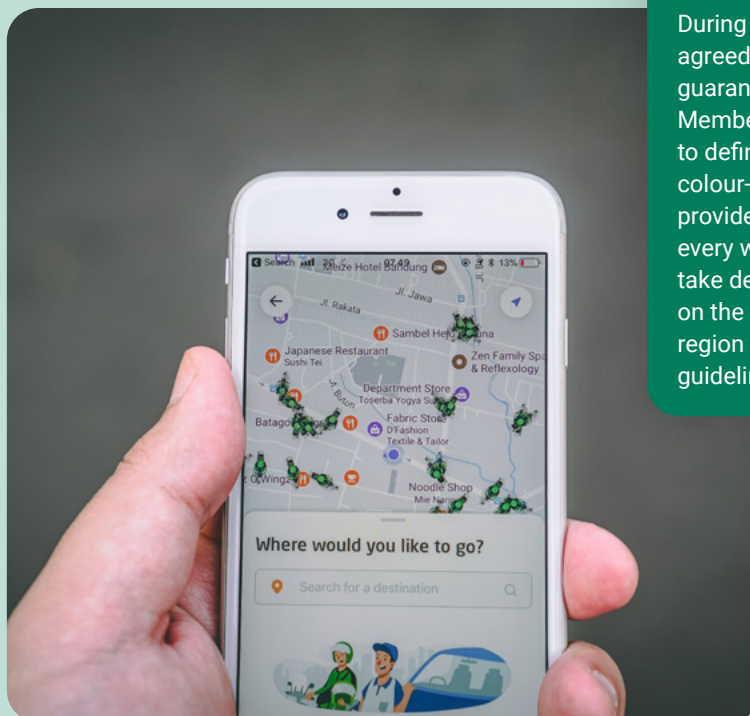
# FLATTENING

The term 'flattening' refers to the homogenisation of culture, gender, and economy. People enjoy growing equal access to goods, services, rights, and opinions due to the internet. Specialised platforms also help to share skills (TaskRabbit), spaces (Airbnb) and resources (Uber) in a simpler and faster way. These innovations often result in new sources of income, more human connection, and the upending of worker protection practices and legislation.

In the healthcare space, homogenous planning is crucial to improve the quality, safety, and cost-effectiveness of care. A common overarching framework of best practices can enhance prevention, preparedness, and response capabilities for future health and climate emergencies.

### EU coordinated travel measures

During the COVID-19 pandemic, EU countries agreed on common travel measures to guarantee freedom of movement in the EU. Member States established common criteria to define safety measures and risk zones. A colour-coded map of the EU based on data provided from Member States was published every week. The map helped EU governments take decisions on travel measures based on the epidemiological situation region by region and provided updated information and guidelines to travellers.





## TREND 4

# ICON TOPPLING

People's mistrust of authority, leadership, and institutions is growing. However, community trust in healthcare organisations is critical for optimal health outcomes. Research has found that people who say they mistrust the system are reportedly more likely to be in poor health.<sup>9</sup> That is because trust drives people to get tested, show up for preventive screenings, receive crucial medical care, and engage with mental health care professionals. Trust is also linked to improved patient experience, better health outcomes, and greater patient perception of the care they receive.<sup>10</sup>



9. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC1484714/>

10. Penn Medicine News. 'Study Finds Patients Prefer Doctors Who Share Their Same Race/Ethnicity'



## TREND 5

# ANCIENT WISDOM

People are turning to home remedies and connecting with traditional medicinal practices to treat modern diseases. Consumers and patients alike seem to find simplicity and the test of time more trustworthy than modern science.

According to the World Health Organization (WHO), 170 out of its 194 Member States (88%) report the use of traditional medicine such as herbal medicines, acupuncture, yoga, and indigenous therapies. The wellness, beauty, and pharmaceutical industries are also seizing quickly on traditional medicinal practices, with over 40% of approved pharmaceutical products today being based on natural substances.<sup>11</sup>



### Potent blast from the past

Foraging Fox, a British condiment company, refers to the ancient Indian medicine system, Ayurveda, to develop the recipe for its Spicy Turmeric Mayo. In addition to being a flavour and visual enhancer, turmeric touts anti-inflammatory and antioxidant properties, making it a popular hero ingredient for consumers.

### WHO Global Centre for Traditional Medicine

In March 2022, the World Health Organization and the government of India signed an agreement to establish the WHO Global Centre for Traditional Medicine in Jamnaga, Gujarat. The knowledge centre, supported by an investment of \$250 million from India, aims at optimizing the contribution of traditional medicine to global health and sustainable development through modern science and technology.

11. <https://www.who.int/initiatives/who-global-centre-for-traditional-medicine>



## TREND 6

# TANGIBLE INTANGIBLE

People are using visual communication to make complex phenomena more accessible through creative data visualisation. Technology and science strive to create solutions accessible to all via apps and mapping. However, while technology giants own the actual production tools, they lack deep healthcare industry knowledge.

Creating partnerships that go beyond the traditional healthcare ecosystem can lead to cost savings, operational efficiencies, and improved access to care and affordability. Cooperation across sectors can also help strengthen data security and cyber controls, as well as boost clinical innovation to ultimately improve health outcomes.

### Interactive COVID-19 maps

The National Academy for State and Health Policy (NASHP) released a new interactive map highlighting US states' contact tracing program models, workforce, funding sources, and support technology which demonstrates how each state is expanding their contact tracing capacity.<sup>12</sup>



### Paternity surprises

Many paternity secrets have come to light in recent years due to the growing popularity of take-home genetic tests. Direct-to-consumer genetic testing companies such as 23andMe and Ancestry typically see their sales spike in the weeks coming up to Christmas. According to fertility lawyers, more such cases are filed after family members give a test as a holiday gift.<sup>13</sup>

12. <https://www.nashp.org/state-approaches-to-contact-tracing-covid-19/>

13. <https://www.nbcnews.com/tech/tech-news/gifted-dna-tests-are-leading-family-surprises-lawsuits-lawyers-say-rcna9545>

# HOW TO OPTIMISE YOUR COMMUNICATIONS STRATEGIES

Trend analysis enables us to take a broad view of where the industry is headed and develop forward-looking strategies in response. Here are our recommendations to companies and brands in the healthcare sector to realise the full potential of communications and create more meaningful engagements with communities.

Do not hesitate to contact us if you have any questions or would like to request more strategic insight. Our healthcare communications specialists are ready to help you start designing for the future.

## PROMOTING DIVERSITY AND INCLUSION

Companies must ensure greater cultural and geographical diversity in their workforce and use inclusive language and multiple communication formats to improve disease awareness and patient support.

## GRANTING ACCESS TO (GOOD) INFORMATION

Healthcare companies must work with patient advocacy groups (PAGs) and healthcare professionals (HCPs) to ensure access to qualitative information for patients.

## RAISING AWARENESS

Together with PAGs, healthcare companies must educate patients and the wider public to address prejudices and stigma associated with certain diseases.

## FIGHTING INEQUALITY

Healthcare companies must fight against healthcare inequities by addressing issues such as the uneven cost of medication.

## IMPROVING TRANSPARENCY

Healthcare companies shall drive transparency and accountability in the sector. More transparency in R&D costs and drug pricing can inform public health policies, promote innovation, and improve access to affordable medicines.

## TACKLING MISINFORMATION

Healthcare actors must work together to prevent fake news, unreliable medical advice (e.g., 'Dr Google'), and extreme positions such as anti-vaccination views to spread unchecked online and on social media.



# ACRONYMS

ADHD	Attention Deficit Hyperactivity Disorder	MS	Multiple Sclerosis
AI	Artificial Intelligence	PAG	Patient Advocacy Group
DEI	Diversity, Equity, and Inclusion	PTSD	Post-Traumatic Stress Disorder
EU	European Union	R&D	Research and Development
HCDM	Healthcare Delivery Model	VR	Virtual Reality
HCP	Healthcare Professional	WHO	World Health Organization

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