



PHM The Health & Wellness Industry's **5 DISRUPTORS** **2021**

Five Health Trends that will Define 2021

Publicis Health Media explores the point of no return across five key aspects of health media and marketing



ANDREA PALMER

President, Publicis Health Media

Singular. It's the only way to describe 2020 and all that we've seen.

A look at the [top 100 global search terms](#) this year reveals that "Coronavirus" was the sole uncategorized trending topic — one that doesn't fit neatly into another topic like "Entertainment," "Weather" or "Shopping." The pandemic is its own category and a metaphor for the entire year.

The virus, our responses and the economic aftermath has revealed crevasses where previously there were just cracks. It has also catapulted health into the spotlight. We're in uncharted territory—and a new order of Disruptors are already reshaping the health media landscape.

1 | STORYTELLING, CONTENT AND PUBLIC TRUST

The past year has done a number on public trust in institutions—of every kind. The COVID response is a perfect, albeit unfortunate, lens on this trend. The public has very little reason to trust what they're hearing and this has some dire implications—people don't know what statistics are accurate or which guidance to follow. Now that there's a vaccine, will people even take it?

Physicians, too, are looking beyond traditional sources of information, trying to figure out if and where trust is warranted—40% of physicians attribute brand preference to factors beyond the product itself. Reaching HCPs with valid information has become a massive challenge for health marketers with in-person contact on hold.

Last year, we called out Content with a Conscience as one of our 2020 Disruptors, noting that influencers “have become proxies for public opinion.” Online consumption is shattering records and influencer content has taken up the mantle of public health messaging. Even HCPs are using social channels to get their message out. Understanding the nuances of how brands should engage with social media to the public's benefit will be key in 2021.



Ensuring that health content is verified and validated before it ever reaches the public is one big step PHM is taking to ensure what we are pushing out into the market is accurate and we have put a program in place to drive confidence and accuracy. We call this Validated By, and as of this writing, we have already validated 19 publishers whose commitment to truth and accuracy is well above industry standard.

We are also working to engage real people—to tell their stories and reflect the communities our consumers and patients represent on platforms that they trust, like Twitter and Tik Tok. Managing the social landscape with authenticity and trust is a major area of opportunity for health given the exponential growth of these platforms.

In 2021, the challenge is to ensure our physicians have what they need to trust the products they recommend and that patients continue to receive the critical, valid information they deserve to stay healthy.

The pharma industry has a major opportunity to show its commitment to the health of society in the year ahead and I, for one, believe we are headed in the right direction.



JEFF ARNOLD

*co-founder,
chairman, CEO
of Sharecare and
founder of WebMD*

HOT TAKE

“According to the CDC, over 40% of Americans delayed or avoided seeking care amid the pandemic. Millions suffer from anxiety and depression, while those managing chronic conditions see further declines in overall health. Though a vaccine is available, disinformation poses another threat to community well-being. Virtual care platforms offering personalized content, data-driven programs, and patient education tools can narrow those gaps in care and restore confidence in safe treatments. Trust is paramount in engaging people in their health and we must foster a culture of accountability that assures them that the health information they access is scientifically validated. This isn’t simply an opportunity, it’s a moral imperative in our new normal.”

2 | HOW 2020 BECAME A TECHNOLOGY ACCELERATOR FOR HEALTH & WELLNESS

In this very human industry, tech has quickly moved from creating efficiencies and connections to being a media platform of its own. In a time when interpersonal connections are limited, technology is enabling new touchpoints to replace those we've lost.

Tech-enabled experiences have become the cornerstone of everything from [clinical trials](#) to virtual conferences and doctor's appointments.

These changes were born of necessity, but are quickly becoming preferred. Just consider the WFH experience—recent surveys show that [90% of workers want to be able to choose where they work from](#), even after COVID restrictions ease.

COVID has disrupted health tech in ways we expect to stick around after the virus has receded. [Telehealth was a \\$3 billion industry pre-COVID](#), but is now expected to account for \$250 billion of the U.S. healthcare spend. There's a shift away from primary care visits by nearly 50% of adults even as virtual visits and alternative retail outlets gain traction. Mental health visits are on the rise, house calls are making a comeback and on-site clinics for employees are even expected to pop up as businesses reopen, predicts Forrester.

For media, these are both challenges and opportunities.





This disruption to health media is revolutionary. At PHM, we've identified new ways to reach both patients and HCPs across virtual and digital platforms. The hiatus of in-person meetings, conferences and even doctor's appointments makes this a critical opportunity. Tech platforms are, simply put, new communications channels and where pharma needs to be in 2021.

HOT TAKE

"We've all heard the pronouncement: Telehealth and personal health tech advanced by years in a few months due to the COVID-19 pandemic. Both were essentially rushed into the breach as stopgap measures. Now, 2021 will be the time to ask how much, and in what cases, these new techniques can be better than traditional medicine, capitalizing on their unimaginable 2020 boost and demonstration effect. Quality of technology, equality of access, healthcare provider acceptance and payer support will be key signals about this most important of the new normals."



BRIAN COOLEY

*Editor at large,
CNET*



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BIG DATA GETS SMALLER

This will be a year of reckoning for data and privacy. The blocking of third-party cookies by Google and other platforms, a strict data privacy law passed in California and impending state privacy law adoptions are causing major disruptions in digital advertising. This pressures an ecosystem heavily reliant on cookies and tracking mechanisms for targeting and measurement.

In health, where every single patient and outcome matters, accurate targeting and measurement have been rooted in a deep behavioral methodology for years. With contextual signals being the strongest indicator of patient identification, contextual targeting has historically been a major focus of any digital activation. The key is to have a strong framework around contextual targeting that targets in the right moments and informs next best action.

To validate and optimize our targeting approach, PHM utilizes evidence-based methodologies to truly understand patient behavior change. This is a crucial component, as marketing mix models that rely primarily on mass data are now facing mass extinction. This has been true in health for some time as the uniqueness of people's health conditions don't fit into a mass data pool. The power of specificity over quantity in data is the future.

Combine this level of expertise with standing restrictions on data use for health, and we find that health is poised to be a leader in a world where the evolution of data and privacy restrictions require data agility in order to drive real relevance for people.



PETER STARK

VP & GM,
Omnichannel
Marketing, IQVIA

HOT TAKE

"We have an opportunity within our industry to find the right audiences, get closer to their specific needs and meet them to improve outcomes. In the age of precision therapies and medicine, we need to emulate that thinking with our marketing efforts. We can use bottom-up customer-focused models to enable marketing activation in the moment of need as opposed to the traditional top-down channel focused models that are usually developed on an annual or semi-annual basis."

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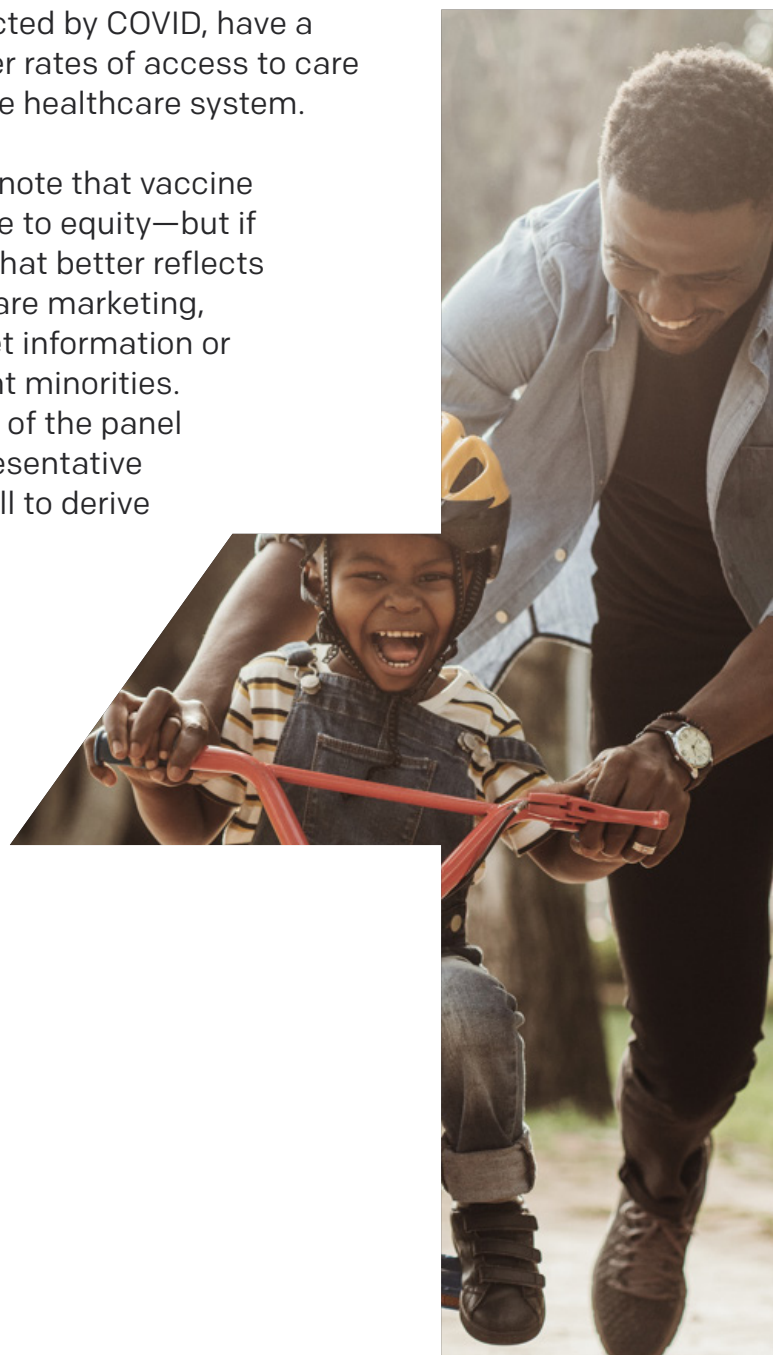
HEALTHCARE INEQUITY AND HOW MARKETERS AND MEDIA ARE SOLVING FOR IT

Data is the lifeblood of marketing and media. We use it to understand insights and develop campaigns—to reach the correct audience in a way that creates positive outcomes.

But what if the data we use to make decisions is not as color blind as we think?

The pandemic has laid bare the deep-rooted social disparities of health. We see more clearly how decades of inequity in healthcare are being borne by communities of color. Minority populations are disproportionately impacted by COVID, have a higher incidence of chronic disease, lower rates of access to care and suffer from inherent biases within the healthcare system.

There's a genuine desire to correct this –note that vaccine distribution is being managed with an eye to equity—but if we are to tackle disparity, we need data that better reflects all the communities we serve. In healthcare marketing, research is often rooted in general market information or panel data which tends to underrepresent minorities. In one leading study, just a little over 10% of the panel identified as African American, less representative than the general population and too small to derive meaningful or actionable insights.





We need to ensure that the data we're using to make decisions reflects the diverse tapestry of our population.

We also need to reach people with more purpose. To see the need for a local-cultural media approach that focuses on cultural relevance specific to a community. A bottom up approach to connecting communities with care teams, and vice versa, in way that recognizes some of the barriers that exist along the path to care.

HOT TAKE

"Big data, disruption, and innovation absolutely hold promise as we navigate and endeavor to solve problems in health and healthcare delivery. But these tools and ideas can also hold peril, particularly as it relates to health inequities. Unconscious biases, systems that operationalize discrimination and structural racism and 'old power' thought processes can easily become a part of innovation, disruption and data systems. As we move forward, individuals, institutions, and those of us in health leadership, must be intentional and proactive in ensuring we are using these tools to eliminate, not exacerbate health inequities."



PATRICE HARRIS

*Everyday Health
Medical Editor in Chief,
#BlackHealthFacts
Knowledge Movement
Task Force Leader*



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MARKETPLACE STABILITY IS THE NEW INVESTMENT DISRUPTION

After 2020, the business of marketing may never be the same.

Industries are struggling to find their footing in today's economic disarray—ad spends are expected to be [down more than 9%](#) in 2020—save for one bright exception: Pharma. Healthcare and pharma are islands of stability in a very rocky port, holding steady in 2020 with a projected increase of 5% in 2021, according to eMarketer.

Market stability isn't coming from where it always did. It's coming from Pharma. That's a game changer.

Pharma is the second biggest spender in the media marketplace after retail, but has traditionally lagged behind even less flush industries when it comes to buying opportunities. It's a disruption that stands to benefit healthcare companies as the traditional recipients of media opportunities, the ones which show up at upfronts with early commitments of ad dollars, are no longer able to commit.

Media suppliers would be remiss not to rethink how they show up with opportunities for brands of every kind.



TALIA RAVIV

CEO, PMX

HOT TAKE

"We have an opportunity within our industry to find the right audiences, get closer to their specific needs and meet them to improve outcomes. In the age of precision therapies and medicine, we need to emulate that thinking with our marketing efforts. We can use bottom-up customer-focused models to enable marketing activation in the moment of need as opposed to the traditional top-down channel focused models that are usually developed on an annual or semi-annual basis."



Never has the idea of disruptors in healthcare been more apt, or important, than it is today. The world in 2021 is vastly different than the one that came before. And it will take new categorical changes across every facet of media and marketing to ensure that our businesses, brands, consumers and culture can all thrive.

To learn more about our 2021 Health & Wellness Industry's Disruptors or if you have any questions, please email laura.heller@publicishealthmedia.com



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