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2024 Health
Trends & Insights

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LETTER FROM PHM PRESIDENT ANDREA PALMER

CES returned this month, with some of the highest attendance numbers seen in years. As “the most powerful tech event in the world”, it’s no surprise to see the show back in full force, but it is inspiring, nonetheless. From the product innovations to the buzzworthy talent and insightful speakers, CES is always full of promise for a brighter future. Our team was onsite for the week, attending sessions and connecting with luminaries in health and beyond – we’re thrilled to bring you this overview of the trends set to impact health and media in the years ahead. And, of course, it wouldn’t be CES without some cool tech.

For the first time in my memory, that cool tech took a back seat to another emergent gamechanger: generative AI. AI was everywhere at CES – some of it disruptive, some of it tacked onto hardware as a differentiator. What’s for certain is that the impacts of AI will be far-reaching, but utility and operability remain open to interpretation.

In health, devices continue to improve across a wide range of use cases, both in assisting with diagnostic information during remote care sessions and improving one’s own understanding of their health. The potential for tech to break down barriers in access, address diversity challenges and encourage compliance is significant. However, several challenges still exist to realize tech’s potential in managing one’s personal health in partnership with their HCP.

In media, we’re seeing new entrants into advertising every day – from entities as wide-ranging as Uber to The Sphere. While retail media networks aren’t net new, many of the big box leaders came to CES to share their methods of reaching customers.

At CES’s C-Space, we explored how tech trends (including AI, of course) were impacting content consumption and creation. We’ve been especially keen on innovation in this space, which positions our clients to connect authentically in a complex environment.

Thank you for coming along on our CES journey – as this year CTA celebrated its 100th birthday, I’m inspired to consider what we will achieve in the century to come.

Andrea



ALL ABOUT AI

Summary:

If 2023 was the year that AI went mainstream, CES 2024 signals its ubiquity as an asset. Intel's CEO Pat Gelsinger went so far as to say that nearly every single company is looking to become an AI-based company.

That widespread fascination speaks to AI's ability to transform each and every industry to be more streamlined and effective. For media, improvements across capabilities like search and programmatic signal better optimizations and reduced ad waste, leading to enhanced experience for consumers and better performance for brands. Personalization through tailored content and refined next best action will continue to accelerate, yielding more powerful connections with consumers.

While some point to challenges in widespread adoption like the spread of misinformation, creation of industry standards organizations, such as the Content Authenticity Initiative, offer protections for consumers and brands alike.

Key Takeaways:

- The democratization of AI will be as big of an impact to marketing as the development of the internet. It should be embraced as a gamechanger in the marketplace that can improve experience for consumers and performance for marketers.
- Maintaining trust will be crucial and the adoption of provenance will help publishers and creators to protect intellectual capital.

Implications for Health and Media:

While AI is set to impact all industries, media is poised to optimize more quickly and with more immediate impact than many other spaces. Marketers will be able to develop more relevant experiences thanks to the ability to use media signals to rapidly create more personalized assets. In this way, brands can build relationships with consumers on their own terms, in the ways they'd like to be reached.

"Here's the ironic thing about AI. AI will actually make all of our experiences with technology feel more human...I don't see a world where there's less technology in our homes, in the most intimate parts of our lives. And so the role that we play is to really humanize it, to bring it to life, to help the world understand how it can make their lives better."

Corie Barry, CEO, Best Buy

CNET'S BRIAN COOLEY ON THE NEXT BIG THING

Summary:

In a now annual tradition, CNET Editor at Large Brian Cooley presented his CES trends report exclusively to Publicis Groupe clients and teams.

Indicative of the dominance of AI at this year's show, Brian highlighted the generational change on the horizon thanks to generative AI's capacity to develop new abilities. While its current ubiquity may lead to consumer burn out in the near term, once tech surpasses adaptive improvement and into truly generative terrain, its functionality will light the fuse of future innovation.

Truly generative AI will deliver on the promise of anticipated needs and away from the current system of disconnected products as a service avenue. While in years past products were the star of CES, Brian spotlighted AI as not just a cool functionality but a mind shift beyond buzzwords.

Key Takeaways:

- Core to adoption of AI's most powerful capability is trust. Consumers need to actually be serviced by the technology to move it from the "miserable middle" of innovation to integration.
- Interoperability and unification are major hurdles to this year's product crop, particularly in health. While products like the NuraLogix Anura MagicMirror may measure 100 health parameters, the application of this data or connectivity with HCP is unresolved.
- AI is a general purpose technology with limitless application and we're seeing the largest players stake big bets – Microsoft has even added an AI key on their keyboard (the first change to that hardware in 20 years).

Implications for Health and Media:

As generative AI further roots in our daily lives, search will be revolutionized, becoming more relevant to each consumer's specific needs. As Satya Nadella, CEO of Microsoft said during a keynote at the show, "people search to be understood." As algorithms become more sophisticated, search will yield accurate answers rather than pages of information. While the implications for SEO are yet to be determined, the change in search should deliver a better experience for consumers and brands.



"We've always wanted answers, but we've settled for information."

Brian Cooley, Editor-At-Large, CNET



THE CHANGING ROLE OF CONTENT

Summary:

Tech and Hollywood continue to converge, exemplified at CES where creators were positioned as media brands in their own right with the likes of Wilder Valderrama and Wil.i.am taking the stage to talk shop alongside creators of all kinds.

The definition of content continues to broaden inclusive of influencer, brand collaboration and even owned. What defines successful content is authenticity, which sits at the intersection of interest and values of the community the work is seeking to connect with. In addition to annual planning, brands need to be agile, responding to organic and socially expressed sentiments in a nimble manner when able and appropriate; the era of a one-way dialogue from brand to consumer is over. While in this environment there is greater responsibility to the consumer, the opportunity for engagement has grown in tandem.

Key Takeaways:

- Maintaining authenticity and brand identity are table stakes in today's marketplace. The ongoing fragmentation of viewing habits underscores the critical need for brands to delve deep into understanding the intricacies of how audiences consume content and what will resonate.
- No matter how captive the audience, if marketers don't delight consumers with excellent content, interest and even loyalty could be lost. And just as powerfully, the reverse is also true: good content can lead to good commerce.

Implications for Health and Media:

No matter how impactful the channel or platform, content is still king. A focus on authentic content and experiences deepens brands connections to audiences and builds relationships in ways that traditional media cannot.

Creativity still sits in the hands of creators, but generative AI will help bring content to consumers at scale thanks to personalization and high volume of creative permutations. At PHM, we're already seeing our approach to content and branded experience reap significant benefits for clients. While some challenges exist when moving media dollars into content creation, the opportunity to forge powerful connections with consumers is too great to overlook.

"How do we stand 'in' culture and not just next to culture?"

Allegra Krishnan, Vice President and Chief Loyalty & Engagement Officer, McDonald's

TECH'S ROLE IN HEALTH

Summary:

This year's health tech took a far more comprehensive view of health issues – and health data.

Gadgets like NuraLogix Anura MagicMirror can measure 100 health parameters, including blood pressure, BMI, facial skin age, heart rate variability and more, but this robust data output currently has no destination beyond the immediate user, meaning its evaluation or incited action is left in untrained hands. The impacts of such medical grade tools in domestic settings are as of yet unknown.

One clinical application of AI that left attendees buzzing was modeled diagnostics, with the potentiality of AI pointing to early indicators of conditions, so called “needles in the haystack” that may not be noticed by clinicians. This can move medicine to become more predictive, rather than reactive.

Key Takeaways:

- Physicians on one panel rank ordered the innovations they'd ask for using AI: 1) alleviate administrative burdens, 2) layer in broader health data adjacent to individual patient test results 3) prioritize the patients who need care first. This demonstrates the real change making capacity AI could have to make better use of physician time, yielding greater impact.
- Tech has the potentiality to improve care for those with less access, including the 20% of Americans who live rurally. Leaders in health equity called for technologists to design tools for specific communities, aligned to their behaviors and modes of access to ensure adoption.

Implications for Health and Media:

Of all consumer technology sectors, few can match digital health for potential growth. The massive development following initial COVID-19 adoption continues to pose potential solutions for improving access and resolving disparities. Since the pandemic, people have become more invested in their health and wellness, leading to new products for monitoring and personal data collection.

The next frontier for this space is to leverage technologies to learn from unified data in a compliant and privacy-safe way.



“As much as we care about AI, its only going to move at the speed of trust in healthcare.”

Gail Boudreaux, President & CEO, Elevance Health

REDUCING DISPARITIES IN WOMEN'S HEALTH

Summary:

Women's health and products developed for women enjoyed a spotlight this year as industries work to resolve decades (centuries?) long disparities in the space.

Experts on "How Tech Can Transform Women's Health" pointed to challenges faced by women including cost, time and accessibility of receiving care. Despite women making 80% of the health decisions for the family, they often deprioritize their own appointments, especially when in-office care conflicts with caretaking responsibilities.

Digital health solutions can provide hope for the future and can aid in lowering health costs and disparity. Products also addressed unique female needs including [Amira Health's](#) "Terra System" uses an AI bracelet, a smart hub, and a cooling mattress pad to predict and counteract hot flashes to help women sleep better through menopause.

Key Takeaways:

- Digital women's health is forecasted to be \$1.2 trillion by 2027 and the emergence of new products points to growth areas, like [Louise](#) an AI-based data platform for healthcare providers and patients designed to help them navigate the fertility journey by helping doctors predict IVF outcomes more accurately.
- Physicians pointed to another AI-powered opportunity – to use AI to evaluate mammograms or other test results within certain demographics, setting a baseline to determine potential deterioration events far earlier than before.

Implications for Health and Media:

As with many innovations in health, a fragmented regulatory environment can create challenges for widespread adoption, but companies are becoming creative in their delivery of care to ensure those who would be helped by such innovations can access them.

Overall, companies focused on women's health have advocated strongly to move this sector out of the shadows and into the fore in order to resolve historical disparities. This has taken shape in media as brands create content to educate women on conditions, while also sharing information with the broader population to continue destigmatization efforts around women's health issues. At PHM, we've found success in targeting women in unexpected ways. The use of traditional formats combined with the increasing presence of women of all ages on social media platforms has resulted in a powerful new playbook for women's health brands.



"We can't treat the true determinants of health with just digital tools but need to consider how to build a relationship and then open a digital world."

Dr. Rebekah Gee, CEO, Nest Health



RETAIL MEDIA LEVELS UP

Summary:

At CES, retailers touted retail media networks as a post-cookie alternative and announced partnerships and AI-applications to automate ad buying, responding to complaints of fractured spend across too many varied platforms in the space.

Albertsons, the grocery chain, announced partnership with Capgemini to level-up media services which until now have been manual. Relatively new entrant Uber also spoke at the show – the transportation juggernaut launched its advertising business in late 2022 drawing on data from the rideshare app and also its delivery counterpart, UberEats.

Walmart – a huge player in retail media – had a large presence at CES, with CEO Doug McMillon delivering a keynote showcasing their AI-powered tools to improve customer and associate experience.

There are new entrants every day in advertising – even The Sphere! – so while the marketplace expands, so too does the stakeholder group innovating for brands.

Key Takeaways:

- Retail media ad spending is expected to rise – from \$46 billion this year to \$109 billion in 2027. Major retailers are catching up to their sizeable influence with new and more sophisticated tools to enable advertisers.
- New AI tools have brought smart TVs into commerce as well. Telly, a startup that delivers a free TV to consumers in exchange for more ads, debuted a voice assistant and Displace added hand gesture functionality that analyzes paused content for products to buy. These entrants are indicative of the new formats of surround sound advertising.

Implications for Health and Media:

Brands will need to blend tried and true tactics with experimentation to find the best ways to reach an evolving consumer. It is no longer acceptable to interrupt and thus extremely important to be mindful of the type of experience consumers want, and delivering it at the right moment, in the right way. As retail media networks' offerings become more sophisticated, so too has the consideration of these networks, particularly in health where decisions are increasingly made in retail environments.

Continued fragmentation will challenge buyers to find consistent approaches to targeting, measurement and using new ad formats by platform and channel. This may provide an opportunity for AI tools to use behavior signals to provide better consumer experiences via content and advertising.

CES 2024 HOT TECH

Apple's Vision Pro

Despite its tradition of forgoing CES, the announcement of the brand's Vision Pro aligned with the occasion. The virtual reality headset allows for pinch and zoom functions midair, essentially a display tool. While the functionality is not a unique differentiator, the Vision Pro boasts its maker's mark which could do much to legitimize the VR sector in the eyes of consumers.

Movano Evie

The Evie Ring is a woman-first wearable, designated as such thanks to its design-forward style and flexible sizing, which allows for swelling amid hormonal changes. While other wearables prioritized bigger sizes to extend battery life, Evie is designed to disappear as a wearable, and appear more like a piece of jewelry. Its companion app also includes period tracking and mood logging, which will eventually power AI-based insights based on correlations between menstrual health, hormones, energy, sleep and activity.

Withing's BeamO Multiscope

This device is intended to power at-home health check ups with an ECG to measure heart rhythm, an oximeter to measure blood oxygen saturation, a stethoscope to assess the lungs (and a thermometer, of course.) With a retail cost of \$249.95, the product is accessible for many and allegedly easy to use thanks to its design similar to that of a remote control. The data can be shared with a physician to inform telehealth visits.

FlowBeams

FlowBeams is developing needle-free technology for vaccinations and other uses. Liquid is pushed through a narrow conductor using laser-generated bubbles, allowing the liquid to penetrate the skin. While this innovation could lead to less stressful medical treatments, it also has potential positive environmental impacts due to lessening medical waste.



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CES

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