

The PHM

HEALTH FRONT™ 2024

Trends & Insights

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TRENDS & INSIGHTS

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LETTER FROM PHM PRESIDENT ANDREA PALMER

As we wrap another HealthFront (our fourth!), I am honored that so many of you joined us to dive into the issues our industry is facing today. Year after year, we address the disruptions in the marketplace in the only forum of its kind — an Upfront created for health to drive innovation in pursuit of improved health outcomes.

As I said in conversation with the brilliant Brooke Shields, “healthcare is the biggest community you never chose to join,” and I think that sentiment echoed so loudly through our sessions this year. No one chooses their health journey, and many wouldn’t opt into it if they could. As a result, we as healthcare marketers think so carefully about these individual journeys, which can be the most challenging experiences of a person’s life.

And while we continually drive for new measurement tactics, truly unique data sources and orchestrated optimization strategies, I perennially return to the deeply human element of the work we all do. We, as consumers and as patients, want human stories — we trust human stories — leading to the incredible rise of patient communities and unique content.

We want our physicians to have that unique piece of information at their fingertips that applies to us because, as the inimitable Gabrielle Union-Wade said, what we all want is “to be truly seen.”

And we want to be empowered, accessing care on our schedules and in a place that meets our needs.

As we work to meet the needs of our dynamic industry, I want to thank you for joining me at this year’s event. Thank you for considering these key takeaways I’ve assembled so that hand-in-hand we can keep innovating for our communities in the future.

Thank you,

Andrea



Brian Cooley, Editor at Large, CNET

Pete Groves, Senior Managing Director, Publicis Sapient

HOW AI WILL TRANSFORM MEDIA

The Disruption

As a throughline across sessions, AI appeared in every single topic area, even popping up in star-studded contexts (Hello, Gabrielle Union-Wade!), demonstrating the potential ubiquity of its impact across content, social, measurement and more. And while all industries are grappling with the promise of AI, healthcare comes with its own regulatory considerations.

While some organizations have already integrated AI in a meaningful way, like social media platforms that have long leveraged AI to power their algorithms, many organizations are still in an exploratory phase, where AI as a buzzword has not yet evolved into an AI strategy.

This strategy is the next phase of the AI evolution — called by Brian Cooley, “an industry-changing moment that I don’t think we’ll see again in our careers.”

The Opportunity

In the State of the Union, Andrea Palmer summarized the early impacts of AI in our industry: “Where we’re starting to see the most positive impact with AI is: where can we take out human error? How can we use AI to sort through the data and facts to find the insight, and then allow the human brain to interpret the insight?”

This marriage between AI as the insight-finder and an experienced human as the insight-interpreter is the next step in integrating AI in a meaningful way. As Pete Groves, Senior Managing Director at Publicis Sapient, and Brian Cooley discussed, “AI will give you answers but only IF you know what your questions are.” Pete furthered the need for humans in the equation, “this [AI] is going to raise the bar for all of us and how we work together,” adding that “the companies who are having success are making this an accompaniment to their people, not as a replacement.”

POWER OF AUTHENTICITY IN CONTENT

The Disruption

As new platforms and channels emerge and gain users, the patient experience has greatly diversified alongside the number of trusted resources. As such, in an age of mass content generation, brands cannot overlook the importance of creating human connection with personalized experiences amid a sea of sameness. The development of original content for brands has the power to connect in ways that drive greater cultural relevance and outcomes.

This content needs to augment existing media plans, says Andrea Palmer, “it’s really hard to expect just a 30-second or 60-second advertisement to break through and build that connection.” More bluntly, [Conal Byrne](#), CEO, [iHeartMedia](#) Digital Audio Group, impressed on the audience that “the power of human storytelling overall cannot be exaggerated,” as “the last 25–30 years of marketing in general can be summed up in ‘overtargeting.’” The solve is to create audience experiences that drive value.

The Opportunity

While the power of content is clear, it is addressing a community with authenticity that unlocks relevance. Said Jeff Fischer, Head of Content at PHM, “from a content perspective, and how it differs from advertising is that we’re not there during breaks. Storytelling allows us to ensure that we are speaking with a community in their language. If you can do that, the value exchange becomes very simple... and most importantly, you have to speak with them and not at them.”

Andrea Palmer echoed the need for a deep understanding of your audience to succeed, adding “health journeys are so personal and so emotional... you may not reach tens of millions of people, but it’s important to reach the two million people that [need to hear the message]. It gives credibility to a brand when they go into those atomized spaces.”



Brooke Shields, Actress, model, entrepreneur, and New York Times bestselling author

Andrea Palmer, President, PHM



Asaf Evenhaim, CEO, Crossix

Amanda Lawson, EVP, Head of Client
Strategy & Growth, PHM

NEW HORIZON OF DATA AND MEASUREMENT

The Disruption

Data, data everywhere... But how much of it carries value? Marketers are facing a deluge of data, which is further complicated in health due to privacy nuances and siloed HCP and patient strategies. On this topic, several panels explored the distinction between observations tied to myriad data sources compared to actual insights. Said Amanda Lawson, EVP, Head of Client Strategy & Growth, PHM, "it's getting more complex, the amount of data and how we are collecting it. On the consumer side, we work with some of the smartest partners working in this space. On the HCP side, the partners vary in where they land on the data maturity scale. That standardization becomes a barrier as we are collecting it and funneling it in to activate omnichannel strategies."

[Loren Grossman](#), Global Chief Strategy Officer at [Publicis Groupe](#), offered solutions: "We should be figuring out ways to offer those kinds of value, utility-based experiences to allow for the first-party data to come our way... We need to start nurturing data sets — new, first-party data sources — that help us address that in a more transparent way."

The Opportunity

PHM Chief Digital Officer [Ray Rosti](#) addressed the promise of all this data by quoting [Loren Grossman](#), "Imagine knowing your next customer as well as your best customer.' That's the vision for him and his solution team. And that's a great guiding light for any of us who want to use data to better understand our customer base."

Navigating how to use and interpret complex data sets requires a keen eye on use case and goals. Organizations are advised to remain aware of the pitfalls of overinvestment in duplicative sources, which could limit campaign efficiency. With the continued assessment of data sources and segments, the use of AI could soon help marketers cleave the insights from the observations at scale.

THE RISING POWERS IN THE REIGN OF SPORTS

The Disruption

Sports remain one of the last live, must-see TV events, commanding a high number of extremely engaged viewers. But sports is undergoing a disruption unique to this category — a move away from network TV to streaming. Underscoring this change, Melissa Shapiro, Chief Investment Officer, Publicis Media, put it simply: “90 out of the 100 top programs are sports and 39% of viewers are watching sports on Connected TV.”

[Jon Tuck](#), President, [Publicis Sport & Entertainment](#), drove this home by saying, “sports is the last way to aggregate an enormous live audience.” He added, “the great news about marketing in sports is, you don’t need to create passion, it’s there. You don’t need to create community, it’s there.”

The challenge? The shift of sports to streaming increases fragmentation and could impact competitive separation. While the landscape may be more complex, investment still carries value against an avid sports audience.

The Opportunity

Looking to predictions of what’s to come, [Mark Evans](#), EVP, Sales at [FOX Sports](#) said, “the way I look at it, sports is tribal. It’s one of the few things that galvanizes people and gets families together, gets friends together. The 2026 World Cup is going to be like something this country has never seen.”

Indeed, between the forthcoming World Cup and this year’s Summer Olympics, massive sporting events will remain top of mind. However, there is another growing segment of note to advertisers: women’s sports. According to Jessica Berman, Commissioner, National Women’s Soccer League, “there is a groundswell of growth happening in women’s sports because of how brands and media partners have changed the script to view this differently... We are bringing to the table brands and media partners and owners who understand that this is an undercapitalized asset that will outperform other asset classes, and we have proven that.” The recent Women’s NCAA TV ratings, for example, broke previous viewership records. In fact, the women’s championship game drew 18.9 million viewers verses 14.8 million for the men’s final. So the case remains, while sports is expanding into new spaces, viewership is expanding right along with it, providing a fruitful place for potential investments.



Melissa Shapiro, Chief Investment Officer, Publicis Media

Danielle Carney, Head of NFL Sales, Amazon

Todd Braverman, EVP, Head of National Sales, Nextstar Media Group, Inc.



Gabrielle Union-Wade, Actress, producer, voice artist, activist, and author

Andrea Palmer, President, PHM

ENDURING NEED FOR SELF ADVOCACY IN WOMEN'S HEALTH

The Disruption

Women's health remains a complex topic as increasing research and resources are chasing an enduring cultural need for women to advocate for and invest significantly in their health, counter to what they may have been taught to do by prior generations. Said Brooke Shields, "The hardest thing to teach — especially to your children — is self-advocacy. We're not taught that as women. We're not taught that we know our bodies as well as others do."

The following day, Gabrielle Union-Wade offered a similar experience: "We have to release the next generation from the shame, the embarrassment, from the fear of actually asking questions that can literally save your life." While navigating her own long path to diagnosis, she turned instead to fellow patient communities on social media and even in comments sections to look for support. By turning to growing online patient communities, Gabrielle Union-Wade's experience echoes that of many female patients — turning to peers to meet a need for trustworthy and accessible information. As patient populations expand into new digital spaces, Andrea Palmer remarked, "the conversation is going to be happening in these spaces regardless of whether our brands or our marketers are involved." The solution? Show up in these spaces with information that matters.

The Opportunity

Healthcare marketers should ensure clinically-sound information surrounds important conversations online and in culture, providing people with relevant and accurate input as they seek solutions in peer-led, community spaces. By providing endemic information where patient communities engage with each other, marketers can build trust with a significant patient sector that may previously have felt unseen or unsupported.

"Influencers are about giving their own side of the story. There are experts who can enhance that conversation. It's a positive thing that we can be a part of that narrative in conjunction," remarked Andrea Palmer. Together, "it's about painting a full picture and telling a full story."

MAJOR PLAYERS INVEST IN HEALTH MEDIA

The Disruptor

The retailization of healthcare is making major waves during the upheaval of commerce as we know it. Jason Goldberg, Chief Commerce Strategy Officer, Publicis Groupe, took the stage to detail the major disruptions in commerce since the advent of barter — a long road with few changes, with just the sixth of such disruptions emerging today.

In this digital commerce age, the path to discovery and advance of purchase is significantly altered; unlike the past, many consumers are not primarily driven to purchase via inspiration at brick-and-mortar locations. This is not a surprise given the enormous online marketplace, but the same disruption applies at point of care. Gone are the days of in-office consideration being the sole driver — but now, even the pharmacy has evolved significantly, with new models from retailers like HyVee and Walmart creating a unique patient experience. A signal perhaps of what's to come? Instacart will deliver some Rx in under an hour.

The Opportunity

Big retailers are tackling big healthcare challenges. And as patients have more choice and greater access to care in more places, they are empowered to make selections that align with their lifestyle. As a result, patient journeys become more personalized and that much more unique.

To optimize their presence amid the digital commerce disruption, brands need to consider retail to be dynamic and evolving — worthy of testing and exploration. Concluded Jason Goldberg, “in the long run we have to be more open minded; I know there are regulatory challenges, but increasingly we’ll find out how to overcome.”



Jason Goldberg, Chief Commerce Strategy Officer,
Publicis Groupe

NEW PRODUCT & SOLUTIONS ANNOUNCED



CareConnect

Forging direct pathways between patients and providers

CareConnect addresses latency in receiving professional care by drastically reducing the wait time to speak with a physician. Through strategic placements within Healthline Media's condition content, CareConnect seamlessly connects qualified patients to treatments through an asynchronous online care service. Qualified Healthline audiences have the option to utilize telehealth services in their exact moments of concern, reducing barriers to care with a safe, mobile-first, discrete online clinic — available 24/7.

With CareConnect, patients may access prescriptions at retail pharmacies or by opting for direct shipping to their home. There is a growing need for telehealth services and brands to work together to meet patient needs — CareConnect delivers this as a packaged solution, connecting patients, providers and brands to pave faster roads to treatment.



Sports Cast Live

Reaching strategic audiences during live sporting events

Sports Cast Live offers brands the opportunity to engage with CTV audiences during 100% livestreamed sporting events. Utilizing a patent-pending "ad scheduler" to maximize viewer engagement, Sports Cast Live ensures ads are delivered only during live games. This approach solves for today's shift toward streaming platforms, ensuring investments are optimized to reach viewers during actual high impact viewing moments.

As a complement to linear or local buys, Sports Cast Live provides unduplicated reach against target audiences, enhancing efficiency in live streaming compared to linear and regional sports networks. This innovative solution addresses inventory fragmentation in the sports streaming market to adapt to how media is consumed today. Sports Cast Live helps brands achieve greater efficiency in livestreaming advertising.

NEW PRODUCT & SOLUTION ANNOUNCED



Care Shop

Empowering patient engagement at key health commerce moments

Care Shop is a comprehensive suite of healthcare commerce solutions designed specifically for clients in the healthcare vertical. With strategies like 'In Pharmacy Push Notifications' and 'Appointment Drivers,' Care Shop redefines healthcare commerce, meeting the unique needs of both patients and providers. By leveraging data-driven insights and advanced targeting techniques, Care Shop can identify and reach the most relevant audience segments.

We do this by developing through innovative, interactive media formats and placing them in contextually relevant digital environments — enhancing strategic value and maximizing brand savings. Partnerships made possible by the Care Shop solution enable precision targeting of healthcare providers, shoppable ads that drive retail traffic, and notifications that engage patients at both pharmacies and points of care.



People Like Us

Pairing the influence of pop culture and the power of endemic expertise to humanize conditions at scale

People Like Us is a multi-media solution across digital, social, print and point of care, empowering audiences to connect with the information they need to navigate life's most difficult health challenges. Brands sponsor celebrity articles and video content on People.com, and the People Like Us solution infuses these hard-hitting, personal stories with critical medical content from Verywell to equip readers and viewers with the lifestyle and treatment information they need each step of the way.

The content is modular in nature, with the ability to scale across platforms by leveraging precision targeting, even extending into point of care. People joins forces with Verywell's endemic expertise to power condition content experiences capable of making a measurable difference in how we connect with all resources necessary for healing.



Michael Joachim, GM & President Life Sciences, Sharecare



Alec Morrison, VP, Content Strategy, Dotdash Meredith
Joetta Gobell, SVP, Research & Insights, Dotdash Meredith



Erin Hawryluk, VP, Product Marketing, Cadent



Steve Alperin, CEO, SurvivorNet
Mike "Bing" Crosby, CDR, USN ret, Founder & CEO, Veterans Prostate Cancer Awareness Inc. (VPCa)

Masterclasses

This year, we welcomed nine masterclasses as experts shared their unique perspectives on our industry's most pressing issues.

Connecting with patients throughout their journey: How to help them navigate toward better health outcomes

Jordan Osborne, Lead Client Experience Manager, Phreesia
Liz Dexter, VP Point of Care, PHM

Optimizing Pharmaceutical Advertising Across Omnichannel Video

Erin Hawryluk, VP, Product Marketing, Cadent

The Shifting Healthcare Landscape: Navigating New Consumer Care Pathways

Sarah Clark, Director of B2B Marketing at Healthline Media

The Empowerment Effect: Where Health Meets Human Need

Alec Morrison, VP, Content Strategy, Dotdash Meredith
Joetta Gobell, SVP, Research & Insights, Dotdash Meredith

Building Brand Narratives for Transformative Storytelling

Nan Kirsten-Forte, EVP & GM EverydayHealth

Driving Patient Advocacy & Elevating Health Outcomes with Personalized Digital Health Tools

Michael Joachim, GM & President Life Sciences, Sharecare

HCP Perspectives: Barriers & Challenges to Quality Healthcare

Dr. Preeti Parish, MD, Pediatrician & VP, Exec. Medical Director GoodRx
Dr. Minsha Sood, MD, FACE, Endocrinologist, Co-Founder & Co-Owner Fifth Avenue Endocrinology

Navigating Niche Audiences: Lessons From a Retired US Naval TOPGUN Commander

Steve Alperin, CEO, SurvivorNet
Mike "Bing" Crosby, CDR, USN ret, Founder & CEO, Veterans Prostate Cancer Awareness Inc. (VPCa)

Solving for This Year's Congested Media Marketplace

John Mangano, Chief Analytics Officer, Deep Intent

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