

2025 Trends & Insights





### Letter from PHM CEO Andrea Palmer

We recently wrapped our fifth HealthFront, an event that – to me at least – always signals the start of spring as we shake off the past and usher in a bright future.

As I said onstage, the event offers a rare opportunity for industry peers and colleagues to step away from the day-to-day and gather to consider the forces affecting our work. Though our industry is ever-evolving, we have never seen more disruption than what we're experiencing now. From agentic AI creating new paths to discovery to an evolving regulatory and legislative landscape, there is no status quo in 2025 and beyond.

Though with great change comes great opportunity. Opportunity to create better experiences, moving the work from 'advertising' to 'truly connecting'. In pursuit of that deeper engagement, the theme of this year's HealthFront was "The Human Behind the Experience," looking past the conformity of "business as usual" to consider how marketing can be of service to patients and professionals alike.

With this approach, we took lessons from other industries – including what commerce can tell us about new care pathways or how creative AI might point us away from hyper-personalization and towards hyper-contextualization. These insights and perspectives are amongst many in this report that we've compiled to continue these conversations.

Thank you for your time and collaboration – truly, together is how we continue to move our industry forward.

Thank you,

### THE HUMAN BEHIND THE HEALTH EXPERIENCE

### **The Disruption**

As a lens through which to view all other innovations, 'The Human Behind the Experience' was the theme and rallying cry for HealthFront 2025. As CEO Andrea Palmer posited in her introduction, successful engagement strategies start with relationships, a value exchange between a brand and a customer. But creating an engaging relationship with a pharma manufacturer or health brand is no small task with "essential friction" for both patients and professionals. This was seconded by keynote speaker Selma Blair, Actress and Advocate who spoke to the need for emotional support when managing a chronic condition, especially when both patients and physicians are overburdened, saying "there's both patient exhaustion and physician exhaustion."

So, as marketers look to deliver real value to patients and physicians as they navigate complex health journeys, engagement is predicated on delivering relevant experiences, "a difference-maker," said Andrea.

### **The Opportunity**

As with all elements of health, it's easier said than done. According to several industry leaders, the key to the equation is determining, and leading with, what is truly valuable to core audiences, rather than what marketers project to be most important. In "The People-First Approach: Bringing Humanity to Healthcare," Gail Horwood, Chief Marketing & Customer Experience Officer, Novartis stressed "we think about really getting in the shoes of the people we serve, so whether that's the patient or those that care for them... we spend a lot of time [trying to] understand their lived experience and then coming back and saying, if we were them, how would we want information to be shared?" This was echoed by Stephen Farguhar, CEO of Publicis Health and David Bowen, a health policy expert, who took a look at how the new administration's policy shifts could impact connecting with patients, with Stephen stressing the importance of patient support and disease state awareness to improve outcomes, adding "perhaps the silver lining is that we're already able to fast follow with things we've put into place through better use of data and better use of technology [to] develop a better relationship with the patient at the heart of it."













### THE SHIFTING SOURCES OF INFLUENCE

### **The Disruption**

For audiences, key to building relationships is trust - challenging to build and perhaps even more so challenging to maintain. And trusted sources of authority are rapidly changing in health. Jeff Fischer, EVP, Head of Content at PHM, cited that trust in traditional sources. such as physicians is down, with "1 in 5 Gen Xers believing that an average person who has done their own research is just as knowledgeable as their doctors." Meanwhile, trust in non-professional resources, such as influencer and celebrity, is up - American adults who consult social media for health information continues to outpace the percentage who approach a physician at 46% and 44% respectively. All of this spells the need for brands to tap new sources of authority to reach audiences with relevant and accurate information.

### **The Opportunity**

Influencers feel the weight of this responsibility, filling the gap between consumers' behaviors – turning to social – and their needs – hearing relevant health stories.

Keynote speaker Chelsea Handler considered why audiences turned to her for such personal stories. On what health marketers could take away from her own approach to building audiences, she shared "candor is everything. The only way to build trust is to tell the truth. It's always about being honest and being forthcoming."

Influencer Angelique Miles built on the concept of authenticity in content, sharing "people trust that I'm telling the truth, not just something to aspire to, but something to relate to...I'm not the expert. I'm an enthusiast."

With those attributes, influencer campaigns can bring significant value in health, no longer siloed to a social platform. Said Doug Szymul, Head of Influential Health about how marketers can seize this current moment to connect, "Think bigger. Don't think of influencer content just living in a phone – think of it as content. It can live anywhere you want it to be."



### AI GETS PERSONAL

### **The Disruption**

The race to implement AI has resulted in this incredible technology becoming a parity asset, rather than a differentiator. With AI-powered everything, the familiar industry refrain of AI as buzzword can actually slow innovative adoption. AI expert Dom Heinrich gave the audience a heavy dose of reality when it comes to buzzwords, encouraging marketers, "You need to look into hyper-contextualization, you need to look at the bigger picture," as "adopting AI will not in itself give you a competitive advantage."

As a result, HealthFront took a deep dive into Al applications that can actually move the needle, acting as a strategic advantage in audience and experience.

### The Opportunity

One of the biggest opportunities is to create better experiences, at scale, by leveraging AI to truly assist both patients and physicians alike.

In "AI Promises a New Path to Discovery for Patients," physicians shared the effects of AI on their patient population. Said Jenny Yu, MD, FACS, Chief Medical Officer, RVO Health, "I think some of these tools, especially if we collaboratively use them, can allow patients to be much more engaged with their clinicians... AI is a fantastic translator, and it's not only translating from one language to another, but from expert to patient, injecting a bit of empathy." Other tools, such as Open Evidence, offers opportunity for physicians to navigate insurmountable volumes of new medical information, said Daniel Nadler, PhD, Founder, Open Evidence that until recently "the volume of academic publishing [was] not usually front page news."

For marketers trying to use that empathy to engage at scale, Al can reduce audience costs and increase quality by pairing Real World and Real Time data, said Jason Patterson, Chief Analytics Officer of PHM, "we have the ability to understand the entire patient journey and to build an audience bespoke to that patient journey in itself." By leveraging data to predict future behavior, marketing efforts become more impactful and far more aligned to the "long tail – not just a linear funnel – of a healthcare journey," said Andrea Palmer.









# Jason Goldberg





### THE ROAD TO NEW CARE PATHWAYS

### **The Disruption**

Consumers are forming greater expectations in accessibility and availability surrounding purchasing decisions raising the stakes across the retail chain. Jason Goldberg, Chief Commerce Strategy Officer at Publicis Groupe, shared how these retail trends are impacting health, including how agentic Al is interrupting and reshaping digital discovery of products. Not only are audiences leveraging new tools (and thirdparty tools at that), but they are expecting a frictionless experience. With patients primed by the broader marketplace for a better consumer experience, healthcare hurdles from cost to experience may prove more painful than in years passed.

As such, disruptors are entering the marketplace to offer new care pathways.

### **The Opportunity**

Panel "What Women Want: The Radical Reinvention of Care" explored an organization making better experiences now, moderated by Alexandra von Plato, with Chief Medical Officer of Thirty Madison explaining how their care model differs from traditional healthcare saying, "[we] create access, create trust and create empathy. It's not just about the first touchpoint of how you came to us. It's about the concept of partnership."

Panels also explored cost as a challenge to be disrupted in health, with Dorothy Gemmell Chief Commercial Officer, GoodRx and Tim White, Chief Digital & Tech Officer, GSK, exploring challenges in and solutions for rising drug costs, with Dorothy suggesting a 45% increase in requirement for prior authorization over the past five years is indicative of the larger patient experience. Tim White noted that patient experience tactics have moved from "point solutions" to a more robust calibration across the patient journey to match individuals to the right solution.

When considering solutions for health marketers on solving for pain points along the path to care access, Jason Goldberg posited the best way forward is to "get [your] data ready... gather the privacy rights to use that data to create better experiences."



### WHAT DOCTORS WANT

### **The Disruption**

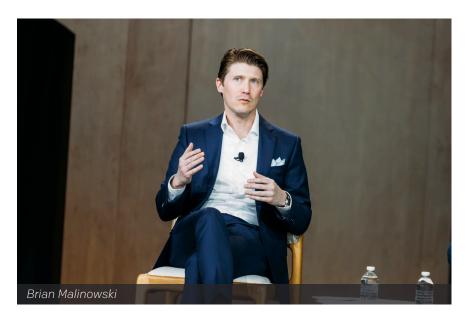
Physicians and healthcare providers are essential decisionmakers shaping the face of care for all patients. However, there are so many demands on their time outside of patient engagement that US physicians remain at higher risk for burnout relative to other US workers. Between a staffing deficit expected to reach 86,000 in the years to come coupled with a deluge of medical information - said to double every 73 days - HCPs are inundated from all sides. When Brian Malinowski, EVP, Business Intelligence at Publicis Groupe asked a panel of physicians if they are overwhelmed by the volume of marketing messages they receive, a choral and unified 'YES' demonstrated a need for new ways of working across the industry.

### **The Opportunity**

Several responses to "What Doctors Want" rang clearly for the audience. One request was creative storytelling in which they can see their patients, a storyline that represents real world and practical concerns, offered by Dr. Anne Marie Morse, DO, Director of Pediatrics Neurology, Geisinger Medical Center.

Physicians stressed trust not only in content but in platform and channel, "no matter how much trust I go into a system with, if that isn't validated continually through accuracy... [trust] is going to evaporate very quickly," said Dr. Travis Zack, MD, PhD, Head of AI for the UCSF Comprehensive Cancer Center.

Custom research investigating the changing dynamics of HCP peer-to-peer influence from M3 MI in conjunction with PHM showed the ways HCPs across generations and specialties are using social platforms to absorb new research and other relevant information. Perhaps the most striking evolution is the professionalization of traditional "consumer" social media platforms. While LinkedIn remains a source of professional community, HCPs are now using Facebook, Instagram, YouTube, and even Reddit to consume clinical content and engage with healthcare influencers. These platforms have become important touchpoints where HCPs often explore medical content in less formal settings.









# Amy Ginsberg, Sarah Spain, AJ Andrews, Sophia Bush, Katie Ford





### FINDING NEW GROUND WITH FAMILIAR CHANNELS

### **The Disruption**

Content consumption behaviors are changing rapidly, splintering attention across platforms that offer little interoperability. This complex environment can yield poor advertising experiences, including waste, overserving and irrelevance.

As Al-fueled advancements make audience targeting more sophisticated than ever, several panels suggested that though the media mix is due for an overhaul, several familiar channels are having something of a glow-up.

### **The Opportunity**

The first channel ready for a rebrand? Programmatic, which is no longer 'just' an awareness tactic but now a true performance driver. Jordan Galbraith, SVP Programmatic at PHM pointed to the agility and high sensitivity of contemporary programmatic thanks to its recent advancements in audience targeting, emergent channel integrations and dynamic creative optimization, allowing programmatic to identify and follow the HCP and patient journey with precision.

Brad Liebow, President of Investment at PHM also heralded the importance of connectedness to addressing a modern consumer, "TV is no longer a one-way box in the living room. It's a connected ecosystem spanning streaming, mobile on demand, linear TV and every screen in between, and in an industry like pharma, where credibility, timing and trust are everything, the stakes are high, but the opportunities are even higher."

Another familiar investment with new shine: sports, particularly Women's Sports, which is breaking records in viewership and revenue, as well as offering new ground in sports to reach an avid audience. While women's sports is exploding in popularity, investment has not yet grown at a comparable rate. Sophia Bush, Actress and co-owner of Angel City Football Club encouraged the audience, "you have to go out and take risks to create value... we want to invest in each other, and if you give us opportunities, not only are you going to make money, but you're also going to create lasting relationship and value with the consumer."



## Jordan Galbraith

## Jared Kildare





### **NEW PRODUCTS & SOLUTIONS ANNOUNCED**



HealthSync offers curated endemic health private marketplace (PMP) deals, providing exclusive access to secondary or remnant DTC and HCP inventory across trusted health platforms, ensuring targeted reach and brand safety while optimizing cost efficiency.

## CORE AV

CoreAl offers a powerful suite of Al-driven solutions that transform pharmaceutical marketing by tackling key challenges in audience targeting, compliance, and omnichannel engagement. Always-On Patient & Physician Audiences uses Connected Identity to continuously refine patient and physician segments, delivering always-on, business-focused audiences available for activation in 49 states without relying on clinical seeds. MLR Content Review employs GenAl to pre-check creative content against regulatory and brand guidelines, speeding up medical, legal, and regulatory approvals and unlocking a major bottleneck in pharma marketing. PCP Activate seamlessly syncs healthcare professional target lists with media partners, integrating CRM and media strategies to precisely engage top-tier physician loyalists and switchers, driving more effective and impactful omnichannel campaigns.



### **Women's Sports Connect**

Women's Sports Connect offers a comprehensive solution to address these challenges by providing access to defragmented media inventory for live games and surrounding content, along with unique activations including media opportunities, content opportunities, talent/influencer opportunities, and sponsorships/events.



Influential Health offers an end-to-end influencer solution for pharma, combining deep industry knowledge, proprietary data and tools, and strategic partnerships. The solution integrates Epsilon's person-based identity platform, which uses AI to enable real-time, omnichannel conversations. Additionally, the AI-powered Radius platform facilitates creator discovery and validation, ensuring brands partner with influencers who resonate with their target audience. This integrated approach enables pharma companies to deliver compliant, human-centered brand experiences across various channels.



### **MASTERCLASSES**

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

### ひ theTradeDesk®

Cure-ious Journeys: Mapping The Patient Pathway Through Media & Advertising

Griffin Connor, Director, Business Development, The Trade Desk

### doceree\*

**Nudging in Action: Real World Examples Across Categories** 

Bryan O'Keefe, Business Director, Doceree

### **Reach**MD

Maximizing Audience Quality: The Data-Driven Path to ROI

Ashlee Post, Ashley Cholast and Judi Gatti, Strategic Account Directors, ReachMD



Moving at the Speed of Health Consumers

Lindsay Van Kirk, SVP and GM of D/Cipher, Dotdash Meredith

### survivornet

Dealing With The Trust Issue In Healthcare: Five Practical Things Marketers Can Do To Create Connection With Patients

Steve Alperin, CEO, SurvivorNet
Dr. Prasanth Reddy, SurvivorNet Advisor



## Beyond the Rx: Engaging Patients Along Every Step of the Journey

Ariana Michaloutsos, VP of Media, PHM Jordan Osborne, Associate Director of Client Experience, Phreesia

### **PULSEPOINT®**

The Pulse of Programmatic: Turning Data into HCP Engagement Gold

Jonathan Zile, SVP Data Solutions, Pulsepoint Keith Matt, VP Sales, Pulsepoint

### deepintent.+

Smarter HCP Media Campaigns Start With Integrated Health & Media Data

Jennifer Loga, VP, Client Insights & Analytics, DeepIntent

### EVERYDAY**⊕HEALTH**

Driving Behavioral Change Through Content, Community, and Commerce in a Rapidly Evolving Consumer Landscape

Justine Barcia, GVP, Integrated Marketing, Everyday Health Tom Carr, SVP of Media and Data Strategy, Everyday Health Grace Rodriguez, DTC Immunology Portfolio Marketing Head, UCB

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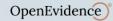


































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