

INDUSTRY PERSPECTIVES

Patient engagement trends to watch in 2025



Phreesia

Life
Sciences

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Introduction

When Phreesia was founded 20 years ago, point-of-care marketing was still a relatively new concept, limited to static wallboards and pamphlets in waiting rooms that offered general health advice and product promotions. Personalized, tailored content that was relevant to the specific person who engages with it was still unheard of—that is, until Phreesia entered the scene.

We saw an opportunity to cut through the clutter and build a truly novel offering that, just after personalized digital intake, connects patients with highly relevant content when they're in a healthcare state of mind. We quickly came to realize this connection was important whether patients were checking in while sitting in a doctor's office, in their car, or on their couch before a telehealth appointment, which became critical five years ago when the COVID-19 pandemic shut down physical offices across the nation. Last year, we expanded our vision again, connecting patients with relevant information after appointments, just before going to their pharmacy.

Our research shows that when people get information that is relevant to their health—their risk factors, unaddressed symptoms, treatment options—at these critical moments along their journey, it drives increased participation with their providers, improved health literacy and better outcomes.

Over the past two decades, the ecosystem around us has transformed with the rise of new technologies, evolving privacy laws and increasing consumer expectations. The concept of “point of care” has changed, as many digital tactics that never fell under that label were leveraged to reach into these same powerful moments in personalized ways and as legacy point-of-care vendors realized that personalization has always been critical. As we celebrate our 20th anniversary in this dynamic space, we're excited about what lies ahead.

In 2025, we anticipate those who have important health messages to share to face new challenges and opportunities: embracing video as a storytelling tool, prioritizing health equity for ethical reasons and to improve their efficacy, and, for marketers, striking the right balance between branded and unbranded messaging.

What's next? Read on for key trends, strategies and tactics to watch in the year ahead.



David Linetsky

David Linetsky, SVP, Life Sciences, Phreesia



Reaching patients at new moments

In 2024, brands made strides in engaging patients earlier through initiatives such as scheduling preventive care, including screenings and diagnostic tests, and booking care with specialists who understand their specific conditions and needs. We expect this focus on reaching patients at new, niche moments to grow in 2025, as our partners pay even more attention to what moments matter the most for specific patient populations.



Community engagement is one way that brands are learning more about the steps along a patient's journey. "We're exploring community engagement by showing up at events—whether health-focused or not—where the right patients are gathered to spark meaningful conversations about health," explained Travis Nevels, Director of Marketing Strategy at Novartis. Meeting patients in their own spaces, whether at local events or community gatherings, also creates opportunities to educate and engage outside traditional healthcare settings. These efforts allow teams to better understand patients' unique needs at every stage of their healthcare journey.



71% of consumers expect personalization

76% of those consumers get frustrated when they don't find it.

[Research shows](#) that 71% of consumers expect personalization, and 76% of those consumers get frustrated when they don't find it. In an era where consumers expect content tailored to their specific experiences, a perfect message must be delivered at the time when it is most likely to make a difference. Personalization means delivering content that resonates with the intended audience, using their preferred communication channels and addressing the specific moment they're experiencing in their unique journey.

Personalization at new micro moments

Paying closer attention to the micro moments along a patient's path isn't just respectful to the patient, it's also more effective. Personalized messaging drives greater engagement because it is relatable and makes sense to the audience. By combining a focus on each unique moment with personalized content, teams can foster stronger connections with audiences and enhance the effectiveness of campaigns.

Intake UX: More engaging, more to cover

Healthcare providers face increasing burdens from administrative, clinical and regulatory demands, which often encroach on appointment and prep time. Despite their desire to focus on patient care, these growing responsibilities and added tasks mean doctors have less time with patients during their appointment time.



More than **3 Million** SDOH screenings have been completed through Phreesia

On average, primary care physicians see about 20-30 patients per day, and they have limited time to spend with each patient. Capturing vital information enables physicians to review it before the visit begins, allowing more time to focus on the patient's needs and address any concerns indicated in the intake process.

We expect to see the patient intake process evolve to improve how many items are handled digitally before appointments. Patient intake refers to the process that healthcare providers use to gather and send all the necessary information from new and returning patients before their visit. It typically includes demographic, social and clinical information, as well as insurance details and payment information. We anticipate the process to evolve this year to go beyond the basic identifying information and capture information about health-related social needs, financial concerns, social determinants of health, sexual orientation, gender identity and religion.



Measuring ROI: Accuracy over comparability

It comes as no surprise that teams care deeply about proving the return on their investment and value of the channel to financial stakeholders. However, measuring the success of novel channels can be challenging.



Test vs. Control Lift Analysis

A method used to measure the impact of a specific marketing strategy by comparing outcomes between a group exposed to the action (the test group) and a similar group that is not (control group). The lift represents the incremental benefit caused by the exposure.

PatientConnect is often measured by 1:1 longitudinal test vs. control lift analyses, conducted by trusted, independent measurement experts.



Marketing Mix Modeling (MMM)

A technique used to flatten and compare the impact of various marketing strategies.

Many analytics teams use this technique to optimize marketing budgets by identifying which channels and strategies deliver the highest ROI.

For years, MMM has promised a way to easily compare the performance of all tactics in a plan—but ask anyone who is familiar with these models, and you'll learn that there isn't actually a golden equation that accomplishes this. Though they are very similar in theory, formulas for MMM vary across organizations and continually change. Moreover, their outputs often don't align to gold-standard evaluation techniques that are specific to a given tactic, leaving different teams with conflicting understandings on the performance of the same campaign.



“ Relying on a single measurement model like MMM to provide clear, comprehensive ROI for all tactics is tempting, but prioritizing comparability over channel-specific methods comes with downsides.”

Karinne Smolenyak, Associate Director, Analytics and Insights, Phreesia



“While these models have been around for years and are useful for evaluating the influence of multiple tactics and other external variables collectively for a big-picture view, they often fall short in capturing the true impact of specific strategies, which can lead to under- or over-valuing any one tactic’s impact. Other forms of measurement or evaluation that methodologically match a given tactic can help to close this gap by providing a more accurate tactic-level evaluation of impact and value,” explained Karinne Smolenyak, Associate Director, Analytics and Insights, Phreesia.

Adding to the complexity is the growing trend of brands bringing analytics in house. While this move can offer more tailored insights, third-party data remains essential for providing external validation and unbiased benchmarks. The goal is to create a better balance, leveraging in-house capabilities for a broader look at all marketing channels while continuing to incorporate robust third-party metrics for objective, accurate readouts of campaign performances.

“ I think we’ve made strides in owning metrics in house while still valuing input from our third-party measurement partners. One of the challenges is that we often look at channels in silos, using inconsistent metrics like impressions for one, clicks for another or video views for a third. This doesn’t account for the depth of engagement unique to each channel or reflect how people truly engage with our campaigns.”

Travis Nevels, Director of Marketing Strategy, Novartis



Leveraging video in marketing

Marketers have long been at the forefront of testing and adopting impactful communication mediums in healthcare, driving innovation to reach audiences more effectively. A recent [study from WyzOwl](#) revealed that 68% of marketers who don't currently use video say they plan to start doing so in 2025. That's because the ROI is so high. The same study suggests that 84% of users purchase a product or service after watching an advertisement video. Even if a consumer doesn't immediately act, the video's initial impact lasts.

“ We see learners engage more when content is presented in smaller, digestible segments. But it's not just about making content easier to consume. This shift enables faster program delivery, meaning critical insights reach patients sooner. And these microlearning modules don't exist in isolation. They act as a pathway to more in-depth patient education, offering learners a way to dive deeper and find community support.”

Kathryn Pucci, Senior Vice President of Education,
Medlive



Videos are a great way to share information while keeping people's attention, all in a quick and easy-to-digest format. This year, we expect teams to use video content to connect with patients and healthcare professionals in more dynamic ways. Short, bite-sized videos on social media platforms like Instagram and YouTube can be used to raise awareness about diseases and treatments and share real-life patient stories, while long-form video can allow for deeper discussion and is ideal for peer-to-peer education and support.



Understanding the unique needs of underrepresented populations

Although 2024 saw significant declines in interest in DEI programs, improving health equity continues to be top of mind for many life science organizations, with [one analysis from Boston Consulting Group](#) suggesting that more than 50% of biopharma companies have formal plans to address health inequities in their strategies. However, reaching underrepresented populations requires a better understanding of the diverse needs of those populations and how various conditions impact their quality of life, emotional health and impact on work.

“ Communities facing economic challenges are often assumed to be similar, but that’s rarely the case. For instance, the Appalachian region and a city like Bridgeport, Connecticut, which is one of the most marginalized cities in one of the wealthiest counties in Connecticut, both experience high poverty rates but have vastly different demographics and needs. It’s important to understand and recognize these differences when addressing disparities.”

Victoria Rosa-Garcia, Senior Paid Manager for Human Pharma & Animal Health in the U.S. Media Center for Excellence, Boehringer-Ingelheim



“Inclusivity also plays an important role in advancing health equity, and many brands are implementing multicultural marketing campaigns to engage underrepresented communities. For example, Novartis recently launched a campaign for LEQVIO® (inclisiran), a medication that lowers cholesterol, tailored for Hispanic audiences. This campaign highlighted how culturally appropriate messaging can help bridge the care gap,” Nevels said.

Creating health education content tailored for underrepresented populations is another critical strategy for improving health equity, in addition to meeting public health goals. Organizations like the Prevent Cancer Foundation are leading the way by developing accessible and culturally relevant health education materials about screenings and vaccinations needed to prevent cancer.

“ The Prevent Cancer Foundation is committed to advancing health equity and improving access for all individuals as part of our vision of a world where cancer is preventable, detectable and beatable for all. We strive to make our information as approachable and inclusive as possible and partner with trusted community organizations to tailor programs designed to break down barriers to screening. Many of our materials are available in multiple languages, and we lean into providing video and graphics as educational tools when appropriate.”



Jennifer Niyangoda, Vice President of Development and Marketing, Prevent Cancer Foundation

That's not to say there won't be challenges pursuing the goal of health equity. Budget constraints often force marketing teams to choose between creating separate campaigns for underrepresented populations or making broader efforts more inclusive. "We often want to go from zero to hero overnight, but I like to think of it as crawl, walk, run," Nevels said. "Your budget might not let you sprint right away, but starting small can still deliver results. Those early wins can help you argue for a bigger investment later."

Closing the loop between HCP and DTC marketing efforts

Marketing teams have traditionally split their outreach efforts between healthcare professionals (HCPs) and direct-to-consumer efforts (DTC), treating them as separate entities with different strategies that merely end in the same conversation. But this siloed approach is set to change as more marketing teams recognize the value of aligning the two strategies more holistically.

This shift isn't just about internal marketing teams aligning. The main goal is improving patient care. [Research shows](#) that 70% of physicians believe consistent messaging between HCP and patient communications streamlines care. Ensuring patients and their doctors are on the same page can bridge communication gaps that often complicate treatment plans and adherence.

"We've typically done things separately," Rosa-Garcia explained. "Pharma companies often split their marketing strategy into HCP and DTC, but now we're seeing a shift in the industry to marry the two."

Planning the two holistically seems to be the path pharma is working toward.”

“HCPs are patients, too,” Rosa-Garcia noted. “How do we put messaging out there for everyone?”

In 2025 (and beyond), marketing teams must embrace a mindset that links patient and physician outreach plans. Doing so can unlock new opportunities to drive engagement, streamline the path to care and ultimately contribute to better health outcomes.



Balancing branded and unbranded messaging

Finding the right mix between branded and unbranded messaging can be difficult. Branded content serves a clear, distinct purpose: to drive awareness for specific treatments by highlighting their benefits and efficacy. However, unbranded messaging is just as important, especially when it comes to educating patients about conditions and encouraging proactive health decisions.

In 2025, striking the right balance will be even more nuanced as patients and HCPs demand authenticity in their interactions. [Studies show](#) that public distrust in the pharmaceutical industry and [public health agencies](#) has increased in recent years, and this distrust can translate to poor medication adherence, as well as rejection of helpful medical interventions and treatments.

“By focusing on unbranded content, organizations can build credibility and trust by emphasizing patient education rather than pushing a product or treatment,” explains Ariana Michaloutsos, Vice President of Media at Publicis Health Media. “For example, in populations with significant unmet needs or stigmatized conditions, unbranded campaigns can help normalize conversations and encourage doctor–patient conversations.”

“ I work on SHINGRIX (Zoster Vaccine Recombinant, Adjuvanted), which is the shingles vaccine. Even though it is the only shingles vaccine on the market right now, we still do a ton of unbranded campaigns just to drive awareness and provide education. We do unbranded campaigns about what shingles is, how the vaccine works and potential side effects. Oftentimes, people just need more education before making the decision to get vaccinated.”

Ariana Michaloutsos, Vice President, Media, Publicis Health Media



The expanding role of the pharmacy

The physician shortage is growing each day, with an [estimated shortage of 86,000 physicians](#) by 2036. At the same time, telehealth options are reshaping where patients get care altogether. As a result, pharmacies are increasingly becoming points of care by [expanding their services](#) beyond traditional prescription dispensing. Many retail pharmacies now offer services such as vaccinations, basic health screenings, chronic disease management and even telehealth consultations with pharmacists. In many areas—especially rural communities and underserved areas—[the pharmacist may be the only healthcare provider physically available](#).



Almost **1 in 4 patients** surveyed (23%) indicate they have **used an online pharmacy** in the past.

Survey of 3,384 adults 18+ delivered on the Phreesia platform in August 2024

For most people, pharmacies and doctors' offices go hand in hand but serve distinctly different roles. Patients rely on their doctors to address fears, explain diagnoses and provide credible, personalized recommendations. Pharmacies, on the other hand, serve as convenient and accessible locations where patients can take action—whether it's filling a prescription, getting vaccinated or accessing follow-up care. This complementary relationship ensures that after receiving guidance from a trusted healthcare provider, patients can efficiently act on their treatment plans close to home.

"The pharmacy is where so many of our consumers are getting vaccinated," Michaloutsos says. "[Prompting] them to the pharmacy is so important."

Online and mail-order pharmacies are also reshaping how people obtain their medications, explains Pamela Arbelaez, Associate Director of Partnerships and Innovations at Phreesia Life Sciences. These online services allow patients to order prescriptions from the comfort of their homes, eliminating geographical barriers and transportation obstacles—challenges particularly pronounced in the increasing number of pharmacy deserts where access to traditional brick-and-mortar pharmacies is limited.





“ Online pharmacies offering delivery services directly to patients’ homes or workplaces—sometimes within just a few hours—can help address access barriers and ensure that patients receive their prescriptions and start treatment more quickly.”

Pamela Arbelaez, Associate Director of Partnerships and Innovations, Phreesia Life Sciences



Research also strongly suggests that consumers who use mail-order pharmacies are more likely to adhere to medication treatment plans. Additionally, some of the next-generation remote pharmacies deliver medications mere hours after a patient gets home, compare prices to offer real savings and more.

The combination of physical pharmacies as points of care and online options for medication delivery is transforming the pharmacy landscape, and we expect to see the role of the pharmacy expand even more this year.



Patients report **price transparency** as the most important feature that online pharmacies can offer them. **Delivery** was a close second with over half selecting this feature as the more important value-add of online pharmacies.

Survey of 3,384 adults 18+ delivered on the Phreesia platform in August 2024

Key takeaways

In 2025, finding new ways to reach patients will be the key to success. How that looks for each organization will be different. It may look like:

- Reaching patients at new micro moments
- Expanding your campaign's focus to reach underrepresented patients
- Leveraging short-form video on social media
- Launching an unbranded campaign to build trust and increase awareness
- Bridging the gap between HCP and DTC marketing efforts
- Partnering with pharmacies

Which direction will your organization go this year? We're excited to see what the year brings.

About Phreesia

Phreesia is the trusted leader in patient activation, giving providers, health plans, life sciences companies and other organizations tools to help patients take a more active role in their care. Founded in 2005, Phreesia enabled more than 150 million patient visits in 2023—more than 1 in 10 visits across the U.S.—scale that we believe allows us to make meaningful impact. Offering patient-driven digital solutions for intake, outreach, education and more, Phreesia enhances the patient experience, drives efficiency and improves healthcare outcomes.

To learn more, visit lifesciences.phreesia.com.

