

INDUSTRY VOICES:

Trends to watch in 2024



Phreesia

Life
Sciences

Table of contents

- Introduction** 3

- The evolution of healthcare consumerism**
 - Meeting patients in the digital age 4

- Privacy**
 - Focusing on security and transparency 5

- Health equity**
 - Building inclusive patient experiences..... 6

- Omnichannel strategy**
 - Maximizing channel mix 8

- Social media**
 - Exploring newer platforms for patient connection10

- The patient journey**
 - Engaging patients on their unique healthcare path..... 11

- Key takeaways**12



Introduction

Technological advances, the demand for personalization and evolving consumer expectations have catapulted healthcare into a new digital age.

From breakthroughs in artificial intelligence to innovations in personalized messaging and channel optimization, the digital landscape continues to rapidly evolve—and brands and industry experts are constantly evaluating and adjusting their strategies to keep up with it. But while such exponential change can sometimes feel overwhelming, Pallavi Garg, Head of Global Oncology Products and Pipeline Strategy at Takeda, says this is perhaps “one of the most exciting times to work in our industry.”

“Data and digital innovations are opening up new possibilities and experiences that we can deliver to truly help our customers,” Gard adds. “It all comes down to embracing this new world and ensuring that our talent, strategies and skills are in balance with our approach to innovation.”

As we embark on 2024, Roz Silbershatz Tomás, who leads the Global Libtayo Core Brand Team at Regeneron, shares Garg’s opinion about the potential of digital expansion. “During the COVID-19 pandemic, we saw that digital was a landscape that can really push out information much quicker than print can,” she says. “It allows for more of that personalization and direct connection versus broader media, so I think it will be more of a trend this year and moving forward into next year as well.”

Industry experts say health equity will also continue to be a major focus in 2024 as brands and manufacturers search for ways to reach and support diverse patient groups. Tailoring educational content and support resources to audiences on digital platforms can help stakeholders meet those patients’ specific care needs, while also making healthcare more accessible and affordable to a larger, more diverse population, explains Arielle Chavkin, Group Director of Digital Partnerships at Initiative.

So, what exactly can brands expect in 2024? Read on for expert predictions on emerging tactics, continuing trends and strategies to keep in mind throughout the year.

The evolution of healthcare consumerism

The fast pace of today's digital world and the ubiquitous availability of information have generated a consumer hunger for real-time transparency across all industries, observes Meredith Odell, Senior Marketing Director at AstraZeneca. That urge has manifested itself in numerous ways, from patients checking their test results through their online patient portal well before discussing them with their doctor, to sharing their medication experiences on social media and researching treatment results in the same way they search for product reviews on Amazon.

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Meredith Odell

Senior Marketing Director at AstraZeneca



“Patients are choosing to share more, learn more and to be their own advocate,” says Odell. “Brands need to consider that patients are going to have higher expectations and want to be active in their care.”

But while the widespread availability of online medical information has motivated patients to take healthcare research into their own hands, they must now determine how to navigate a data overload, notes Alison Tapia, Senior Director, Performance Marketing and Digital Innovation at Dermavant Sciences. “Even myself as a consumer, just from scrolling on my phone in the morning when I wake up, I think about how many messages I’ve been served before I’ve even gotten out of bed,” she says.

Patients receive healthcare content from a range of media channels, from niche and emerging platforms to mass media. With that broad mix in mind, it’s crucial to reach them in ways that they trust and in the spaces they engage with most.

Being present on the channels that patients frequent is imperative for brands, Tapia advises. “If your message isn’t there in the moment when the patient is looking for information, someone else’s will be,” she says.





Spotlight on: Data optimization

Data insights can go a long way toward helping brands better understand and deliver relevant information to patients. In 2024, industry stakeholders will be much more thoughtful and intentional about the data they collect, predicts Takeda's Garg. "Data is the new oil, and companies are continuing to realize the importance of proprietary data in creating a competitive advantage."

In addition, Cassandra Sinclair, a senior health and wellness advertising executive and board advisor, expects that companies will increasingly rely on data analytics, artificial intelligence and machine learning to optimize their campaigns, measure their effectiveness and gain actionable insights for improvement. The result? "We'll see more of a focus on personalization in 2024, as patient-centric brands will strive to build stronger relationships with patients and healthcare providers much earlier in the health and wellness continuum," Sinclair says.

"The shift to personalization will involve leveraging data analytics and customer relationship management systems to gain deeper insights into patient needs and preferences, and then tailoring messages and content accordingly," Sinclair adds.



Pallavi Garg

Head of Global Oncology
Products and Pipeline
Strategy at Takeda

Privacy

While in the past many brands have leveraged demographic data or cookies to better understand various patient audiences and their specific healthcare needs, privacy must come first and foremost, notes Alexandra Beneville, Phreesia's Vice President of Content Strategy.



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Alexandra Beneville

Vice President of Content Strategy at Phreesia



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Beneville explains that it’s crucial to strive to make sure end users clearly understand what they’re consenting to, including what data is being gathered from them, how it is collected and how it will be used in the future, as well as their rights to manage permissions and changes.

“With healthcare messaging, we need to be stewards of privacy and security at every moment,” she says. “While putting these controls in place takes work, brands should consider the meaningful impact that personalization has on patient outcomes.”

And, with the privacy landscape shifting quickly, it’s also vital to stay on top of changing regulations, according to Takeda’s Garg.

Patients are making it clear that their privacy is important to them, so brands should put practices into place to build transparency, such as working to ensure that opt-in or opt-out options for data processing are clear to patients.

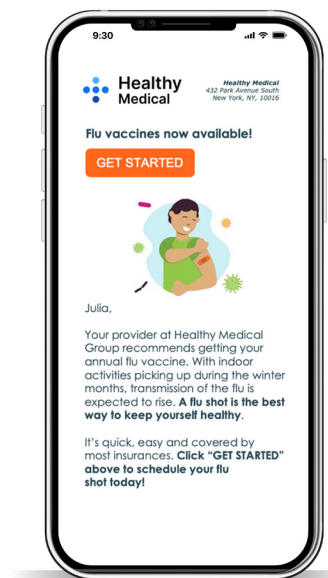
“Healthcare companies are under increasing pressure to be more transparent and accountable for their messaging practices,” says industry expert Sinclair. “This includes being more open about their data collection and usage and being more responsive to patient concerns.”



Health equity

With the industry-wide focus on personalization, patient health education and support for closing health-equity gaps will continue to be a priority in 2024. Initiative’s Chavkin anticipates that messaging that aims to empower patients to manage their own care will take center stage as brands leverage digital solutions that offer patients content tailored to their unique medical—and social—needs.

“Considering your audience not as a group, but rather as individuals, and personalizing messaging to address their varying social determinants of health needs is crucial,” Chavkin advises. Such efforts support making healthcare services more accessible to and affordable for a larger and more diverse population—a goal that brands also should incorporate into their messaging and creative strategy development.





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Arielle Chavkin

Group Director of Digital Partnerships at Initiative



“Brands should truly embrace and plan campaigns based on how the same disease can impact different communities,” says Chavkin. “When budgeting for campaigns and deciding where dollars should go, it's vital to consider the intended audience's socioeconomic status, race, religion, age, gender identity, sexuality, etc.”

Indeed, making sure that messaging represents all types of patient groups is crucial for building inclusive patient experiences. And connecting with patients on an emotional level and making them feel seen is vital to advancing health equity. The best way to connect with diverse patient audiences is by incorporating their experiences and feedback into content development, thereby providing a more accurate reflection of their challenges and needs in the campaign. When diverse audiences see themselves represented in campaigns and a connection is established, disease education and resources are more likely to resonate with them.

In addition to empowering patients to manage their own health, Chavkin highlights the importance of closing care-access gaps by improving patients' understanding of healthcare and its terms, technologies and treatments, otherwise known as health literacy. Brands are increasingly asking a core question: Can the intended audience easily understand and act on this information? Because health literacy levels can fluctuate depending on patients' circumstances, it's important to provide content that is digestible, accessible and actionable for all patient audiences.





Spotlight on: Artificial intelligence

The use of artificial intelligence (AI) is transforming healthcare and will continue to be an evolving force in 2024. Indeed, AI is helping brands become much more efficient, notes AstraZeneca's Odell, from optimizing paid-search investments to increasing their capacity for content creation.

"AI is almost like a right-hand man on our team," she says. "We're always considering: Could AI do more from an operations perspective? Could it review content? Could it help us with market research? All of these questions are on the horizon for AI-use cases."

Phreesia's Beneville also acknowledges that AI is a viral topic across the industry, but huge questions remain about how to leverage it in productive, secure and innovative ways.

"2023 democratized access to AI tools," she says. "And 2024 will be the year of adoption and application." Industry experts will keep a close eye on AI's continued impact on content creation and consumption, as well as patients' understanding of health information.

Omnichannel strategy

Amid the rapidly evolving digital landscape, building a successful omnichannel strategy requires finding the right balance among the channels that reach various patient audiences, from mass media to the point of care and beyond. With that in mind, Dermavant Sciences' Tapia expects brands to maintain a strong focus on optimizing and maximizing their channel mix in 2024.



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Alison Tapia

Senior Director, Performance Marketing and Digital Innovation at Dermavant Sciences





“As pharma moves to embrace more of an omnichannel approach, the role that each channel plays is being looked at with much more scrutiny,” she says. “Brands are asking more questions to understand whether their strategy is working. Some of these critical considerations include: Are we reaching the right people? Are we showing up with appropriate messaging for that channel? Is it impactful? And can we compliantly message in that channel? ”

Thinking more strategically about which messages to show on which platforms will drive more effective patient engagements, according to Regeneron’s Silbershatz Tomás. “Understanding the different platforms and ensuring that you really tailor your message to the channel that it’s on helps you connect with the right audience,” she says. For example, she explains that she would never place the same message from a programmatic display banner in a point-of-care engagement, since the latter channel provides a much greater opportunity for personalization and specificity.



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Roz Silbershatz Tomás

Senior Director, Libtayo Core Brand Team Lead at Regeneron



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Social media

On top of innovations in AI and personalized messaging, the industry will also continue to explore newer social-media platforms such as TikTok in 2024, predicts Juli LeDoux, Director, Marketing–Patient at ImmunoGen. “As trends evolve and change and new platforms come out, we’re going to want to be there,” she says.

With its short-video format, TikTok can be a prime outlet for reaching and educating users scrolling for entertaining, yet informative health content in their leisure time. Still, it’s vital to understand its audience demographics and the types of messaging that might work best on the platform, LeDoux advises.



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Director, Marketing–Patient at ImmunoGen



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It’s also important to launch social-media messaging on platforms that have appropriate guardrails or where brands can take a thoughtful risk, says Regeneron’s Silbershatz Tomás. In other words, just because certain platforms are out there doesn’t mean brands need to leverage them. It’s important to view social media as not just another way to get messaging across, but rather, as a way to connect with the right audience.

“LinkedIn is an amazing platform, but I see it much more as a promotional landscape to focus our healthcare-provider messaging,” she explains. “Facebook and Instagram I very much see as the patient landscape, or the place where you can reach patients appropriately with relevant messaging.”

The patient journey

While digital advancements are creating new touchpoints for messaging, they're also expanding opportunities to engage with patients along their unique healthcare journey. The healthcare industry has collectively reinvigorated its focus on preventive care, fueled by advancements in digital-health devices, as well as a significantly broader national prioritization of health and wellness following the COVID-19 pandemic.



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Cassandra Sinclair

Senior health and wellness advertising executive and board advisor



"What's happening in the messaging communications world is that science is now meeting personalized storytelling," says internationally respected executive Sinclair. "The way in which we engage consumers, patients and caregivers will fundamentally change in 2024."

In the year ahead, the U.S. healthcare system will continue to double down on preventing disease before it begins, experts predict. There are now more digital preventive-health tools than ever before, including wearable devices that can deliver a continuous stream of patient data to healthcare providers. Such technologies create further opportunities for brands to engage with patients—and for longer periods of time.

"We have always thought about the patient journey, but usually with a narrow focus on a key moment along that journey," says Phreesia's Beneville. "Now, we as an industry will have to think as much about engaging with patients at early healthcare moments such as screenings and supporting their genetic predisposition and risk-factor understanding, rather than just communicating diagnosis and treatment options."

In expanding their focus to prevention and not just treatment, brands need to approach the patient journey more holistically and accordingly adapt their communication strategies to stay with patients on their unique healthcare path. To set up patients for therapeutic success, give them content relevant to where they are on their healthcare journey, whether that means education and resources on vaccination, disease awareness or medication adherence.





Key takeaways

In 2024, personalization and meeting patients at more moments along their healthcare journey will be key. Expect to see a clear shift away from an insight-driven, static content-development approach toward an industry mindset that is more focused on data-driven and intuitive messaging, industry expert Sinclair predicts.

ImmunoGen's LeDoux anticipates that the industry will see further adoption and advancements of digital-personalization capabilities that can help drive disease and treatment awareness. "As a patient educator, my goal is to inform patients of a treatment that might be right for them or an option they might not have explored before."

In 2024, she says "the industry is really going to keep homing in on using programmatic and highly personalized endemic sites, or the point of care, to reach the right patients with relevant messaging."

"At the end of the day, patients are our North Star," says Dermavant Sciences' Tapia. "You want to make sure that whatever content and resources you're showing up with are really going to create the best experience for them and help move them forward in their treatment journeys."

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 120 million patient visits in 2022—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.