

PHM ↘ CES

2025 Digital Health
Trends & Insights

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LETTER FROM PHM CEO ANDREA PALMER

This year's CES promised to deliver a snapshot of where the rapidly evolving digital landscape is today and potential destinations where we might arrive in the years, days and minutes to come as the rate of change exponentially accelerates.

Though by its name CES should be all about the gadgets, I've seen it transform in recent years into more of a media show, in part thanks to significant advancements in ad tech and more broadly, I think, due to the evolving role of media in consumers' lives.

I was thrilled to see health take a bigger stage at this year's show, with the Digital Health track enjoying more prominence at the Venetian and welcoming nearly 19,000 to take in the programming and hot tech to address needs in the U.S. and global health systems (see more of this on page 9).

And, of course, the entire show was propelled by AI. In our Publicis Groupe CES kick off, Brian Cooley, Editor at Large of CNET put it simply: "AI will continue to be the number #1 story at CES throughout your entire career". What will change however, is AI's ability to anticipate our needs.

So called 'Pervasive AI' or 'Affectionate AI' should anticipate needs, seemingly 'empathizing' with consumers to deliver differentiated and personalized experiences. Whereas in the past consumers might have been overwhelmed, the future promises true 1:1 experiences precisely tailored to an individual, not an audience. As with most advancements, incremental or game changing, the consumer is the final arbiter of what to incorporate into their daily lives. As such, marketers must evaluate according to this value: who is human at the center of each experience and how does change enhance their life?

As we delve into these trends, it's clear that the future of healthcare is becoming increasingly digital, accessible and tailored to individual needs. As the world's largest tech event, this year's show pointed to the latest developments set to fuel the future of digital health, offering insights into how technology is transforming the healthcare industry and improving patient outcomes.

Thank you for reading along as we spotlight the trends and takeaways in digital health.

Andrea

The Future of Digital Health



As AI adoption increased this year, many sessions – in health and otherwise – focused on the consumer use case, with CNET Editor at Large Brian Cooley citing an early, but still relevant, quote from Steve Jobs who said, "You've got to start with the customer experience and work back toward the technology, not the other way around."

Almost every session on digital health came back to consumer experience, with Diogo Rau, Chief Digital Officer for Eli Lilly calling for the industry to "modernize the customer experience," echoed by David Holmberg, CEO, Highmark Health advocating a change in approach to patients, telling marketers to "meet them where they're at and meet them like consumers."

Supporting this evolution is the adoption of wearables and generative AI yielding a more sophisticated patient population, with Laura Adams, Senior Advisor National Academy of Medicine crediting these tools, "our patients have become stronger as partners." Matthew Lungren, Chief Scientific Officer, Microsoft shared similar experiences – that AI is ultimately improving the relevance of information patients bring into clinical spaces.

An exciting frontier in servicing patients is digital therapeutics, or software as a medical device. Such tools are increasingly being reimbursed, with three new codes introduced as of late, but opportunity looms large. As Edward Cox, General Manager of Digital Health & Medicines Pfizer put it, "we are authors in the era of Gutenberg."

"From a historical standpoint, we're at the right time to see healthcare be redesigned."

*Dr. Michael Howell
Chief Digital Officer, Google*

IMPLICATIONS FOR HEALTH AND MEDIA:

As consumers are increasingly leaning into digital experiences for improved access and convenience, providers, manufacturers and tech leaders are pursuing new channels to forge direct-to-patient relationships. While patients continue to experiment with digital health solutions, we must continue to consider tech that drives true value for the end user, focused on adherence and ease. As patients take more control over their health, it remains to be seen how, or if, this autonomy might liberate overburdened healthcare workers.

→ KEY TAKEAWAYS:

Several sessions touched on lacking financial incentive for an overhaul of the system, with Google's Chief Clinical Officer bemoaning "the system we have is perfectly designed to achieve the outcomes it achieves." As such, many speakers pointed to an evolution in payer behavior to support physician time in reading wearable data from myriad sources debuted at the show.

As the FDA continues to evaluate and issue guidance on AI tools, innovation needs to expand beyond just consumer tech in order to drive significantly improved outcomes.



Culture as Character

The power of live events to dominate and shape popular culture was pervasive at CES's C-Space marketing and advertising hub.

CES exhibitors like Netflix and Warner Bros. Discovery recently evolved their on-demand content libraries, securing the rights to live sports to great impact.

65m Live viewers for Netflix's Christmas Day programming

Other major players are entering the fold. Disney's Global Tech & Data Showcase at CES heralded programmatic buying for its live sports inventory thanks to the ad tech server acquired along with Hulu and NBCUniversal launched new ad formats for live events on Peacock.

New and improved experiences streaming sports are primed to make those live events even more potent. During panel "AI Integration and the Impact on Sports," panelists foresaw a fan-focused, AI-powered future wherein a second screen environment

could contextualize the plays on the field, creating a "next gen viewing experience" by educating fans in real time or predicting plays or probability of success, allowing fans to speculate on key aspects of the game in advance. Likewise, AI could aggregate thousands of hours of film to provide new edits for fans, a focus on specific players, plays, teams or seasons.

As human-forward live events will maintain relevance, AI will enable even greater consumer experiences, perhaps further expanding powerful fandoms.

"AI presents an opportunity for fans to become true experts without having to devote their entire life to learning about sports."

Ryan Foutty
Head of Business Development, Perplexity

IMPLICATIONS FOR HEALTH AND MEDIA:

As sports embraces AI to drive a better experience for fans at every level, the connection between consumers and teams will continue to deepen. This will render the sports marketplace even more competitive. However, as AI-enabled second screens and other media channels emerge, so, too, will new forums and spaces where marketers can connect with consumers in high engagement moments.

→ KEY TAKEAWAYS:

AI-powered fan experiences and media products could enable brands to break through in culture-driving moments, like The Olympics, dispersing opportunity and cost across data-informed fan audiences.



Realizing True Personalization

Personalization in messaging and content has been the white whale of digital advertising, and with increasingly sophisticated tools, we are finally approaching this future state.

The game changer is the introduction of agentic AI, which can execute specific tasks autonomously. Agentic AI was the buzzword du jour at this year's show, and for good reason. It can be built into workflows to automate tasks simple or complex, with enough transformative power that it was a central technology in Nvidia CEO Jensen Huang's keynote, one of the most anticipated events of CES 2025.

5x More content will be needed in the next 2 years to address the need for personalization, according to Adobe GM Varun Parmar

As AI fuels the evolution from promise to practice in personalization, speed to market for campaigns will be similarly fast tracked, with creative evolution that had previously taken weeks now being accomplished in days.

"One of the most important things that's happening in the world of enterprise is agentic AI."

Jensen Huang
CEO, NVIDIA

IMPLICATIONS FOR HEALTH AND MEDIA:

In marketing and media, our goal has been to drive personalization through three main pursuits: data, consumer journey and content. We've made significant advances in securing and managing the data we need and understand the journey, but content personalization has been an ongoing challenge. With agentic AI, we can unlock more opportunities to create with speed and at scale, though efforts will need to levy carefully considered legal review.

→ KEY TAKEAWAYS:

AI has a critical role to play in the future of content creation, but there are boundaries in terms of what people will accept. People resist content that feels unnatural and inauthentic. AI can take us far but we need humans to ensure authenticity and accuracy.

Connectivity in Branded Entertainment

In-house brand studios, first launched at the top of the decade, are once again gaining steam, with LVMH and Starbucks, among others, looking to fully own narratives and reach consumers directly, rather than advertising around content. As the content rolls out later this year, the marketplace will judge its effectiveness.

Meanwhile, in a C-Space Studio interview, Brian Toombs, Head of Roku Brand Studio spoke to the enduring power of external studio partnerships, "brands know what story they want to tell. If everyone leans into their expertise.. [e]veryone is rowing in the same direction."

Another trend bolstered by CES presentations is inter-divisional collaborations in major studios yielding powerful (though as of yet rare) opportunities for highly engaging, multi-platform content. Sony Pictures CEO Ravi Ahuja pointed to the success of video game turned marquee TV title "The Last of Us", "We don't have a committee that forces people to do things and says there must be four collaborations this year. It's collaboration without bureaucracy, so everybody feels good about it and leans into it." This pointed to a reoccurring theme -- said Jennifer Witz, SiriusXM CEO, "with the breadth of great content out there, the challenge is discovery." As such, the focus on authentic experiences the audience actually wants are more likely to break through in a competitive environment.

"Partnering with advertisers to create entertainment or support entertainment has been tremendously successful. The consumers don't distinguish, they don't say 'that's a brand thing' or 'that's not a brand thing,' it's either 'I like it' or 'I don't like it!'"

*Brian Toombs
Head of Roku Brand Studio*

IMPLICATIONS FOR HEALTH AND MEDIA:

As the divisions between content types blur (such as the rise of video in podcasting or video gaming as a social media experience), more opportunities arise for unique brand-supported or brand-created content. As content proliferates, quality will be the judge and jury in determining engagement. Audiences are less likely to take issue with brand support and far more likely to shun content that feels inauthentic.

→ KEY TAKEAWAYS:

CTA Futurist Brian Comiskey also pointed to the intersection of video, audio and gaming mediums with titles such as Marvel Rivals mobilizing fandoms, "these mediums are seeing their strategies blur in an effort to secure audiences through intentional and inclusive programming."





"Age Tech isn't just about living longer—it's about living better, healthier and happier lives"

*Dr. Minter-Jordan
CEO of AARP*

Age Tech Matures

As the US population gets older (Census data shows a nearly 40% increase in population aged 65+ in the last decade), aging was a top topic at CES. Biotechnology, digital health and wellness technologies are converging to address longevity at the individual level.

While precision medicine was a consideration on many panels, much Age Tech focused on aging in place and receiving as much care as possible in-home. "We have an incredible opportunity to

52% U.S. consumers own at least one of the top ten perceived age tech products.

improve health from the home," said Ricky Choi, Head of Digital Health for Samsung, which debuted multiple digital health offerings.

While many products on the floor focused on data collection, Samsung proposed the

inverse with CareHub, a digital care platform aimed at adherence while supporting caregivers comanaging treatment. As innovators approached quality of life, a fan favorite emerged: Tombot, which designed a robotic therapy dog named Jenny in partnership with Jim Hensen's Creature Shop for those across the treatment spectrum, from Alzheimer's and dementia to anxiety, who cannot care for a live animal but who would greatly benefit from connection and improved mental health.

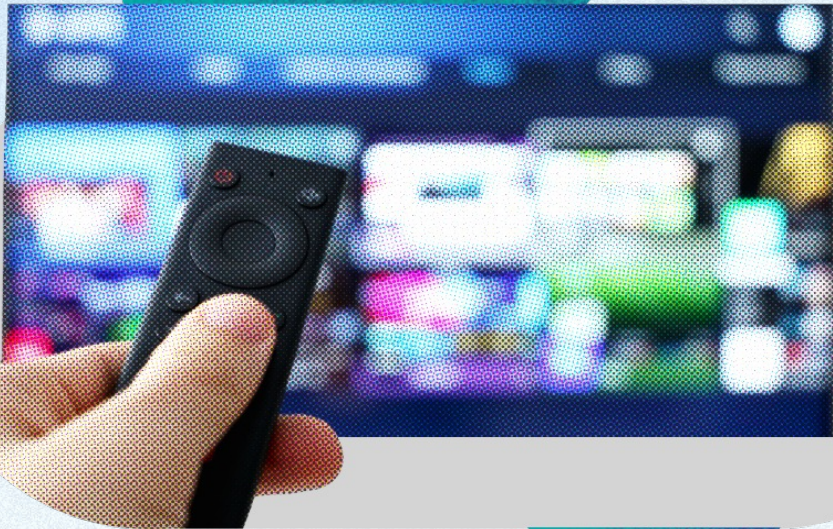
IMPLICATIONS FOR HEALTH AND MEDIA:

This year's Age Tech was reflective of the overall move to a consumer-first approach in health, focused on providing tools and better insights for patients to manage their health outside of the doctor's office. While past years have offered bespoke tools for data collection, this year's sessions and products explored how empowered patients could be a feature, not a bug, on our complex healthcare system. See page 9 for more new products.

→ KEY TAKEAWAYS:

There is an increasingly blurred line between smart home and age tech as health at home comes to the fore for aging populations. 80% of U.S. consumers consider smart home tech as age tech.

As such, opportunities could arise for brands to enhance patient and caregiver service efforts with relevant technology, and from a media perspective, for relevant messaging in health devices such as smart TVs or other digital products.



Refining Digital Video

As an increasingly media-focused conference, CES marks the unofficial beginning of Upfront season (or at least CTV upfronts), and streamers were out in force. Disney had near daily announcements – from a new ad product to combat data fragmentation to ad certification for live sports. Among its competitors, the most compelling announcement of these was Disney's subscriber numbers.

157m global ad-supported subscribers across Disney's streaming portfolio

NBCU continued to double down on biddable live sports deals and parent company Comcast debuted a self-serve ad platform, Universal Ads, that is integrated with other studios for supply.

Streamers weren't the only ones making news: distribution platforms also made a showing at CES. Roku announced an evolution of its clean room, Roku Data Cloud, to give buyers direct access to detailed streaming data. While also flaunting their scale – 90+ million households – Roku announced a partnership with Innovid to manage frequency.

IMPLICATIONS FOR HEALTH AND MEDIA:

Ahead of this year's Upfronts, digital video continues to demonstrate iterative steps towards new and improved experiences for advertisers and consumers alike. While we can expect broader announcements later in the spring, CTV's presence at CES showed continued engagement with new and emerging ad tech.

→ KEY TAKEAWAYS:

This year's CES saw plenty of incremental adds and announcements, but no monumental changes moving the state of play. This is reflective of the overall ecosystem in recent months – refining, maturing, expanding. In the year to come, acquisitions and reorgs from almost all the major players are sure to bring compelling competitive opportunities.

"It used to be platform exclusivity, now we're seeing these shows can exist on multiple platforms. And on each platform, it can find their audience."

*Barry Jossen
President & Head, A+E Studios*

2025 Hot Tech



OnMed CareStations

This hybrid care company debuted its 'Clinic-In-A-Box' solution which offers real-time consultations with remote healthcare clinicians, tools for measuring vitals such as blood pressure, temperature, oxygen levels, and thermal imaging. Notable for its compact, private and secure environment, CareStations could enable underserved communities to have access to care where other clinics have been challenged by staffing hurdles.

Withings BPM Pro 2

This cellular blood pressure monitor collects precise measurements augmented by patient reported behaviors to give context to reporting. This additional data is delivered to the care team to ensure readings are consistent and actionable.

BPM Pro 2 measures heart rate, blood pressure and comes with the future capability to take a 1-lead ECG to detect atrial fibrillation, following FDA Clearance.

EssilorLuxottica Nuance Audio

These discrete hearing augmentation glasses are primed to assist the near 1.5 billion people suffering from some level of hearing loss. EssilorLuxottica, which also owns Meta Smart Glasses partner Ray-Ban, designed these frames to draw audio directly, or wherever the user is facing, rather than amplifying all ambient sounds.

Ōmcare Phygital Home Health Platform

Aligned with the pervasive trend of Age Tech supporting aging in place, Ōmcare Home Health Hub blends the physical aspects of health support with the benefits of digital connectivity. By linking patients, pharmacies and care providers, the Ōmcare Home Health Hub fosters a sense of community and human connection while providing a holistic caregiving experience, ensuring aging individuals feel supported and connected. Notably, the system dispenses pouched medications direct from the pharmacy to allow aging adults and their caregivers efficiently manage medication regimens.

Humetrix Global Health Communicator

Created in service of the 2024 summer Olympics, this global health platform announced voice-to-voice capabilities at CES that will allow patients to better communicate with medical and pharmaceutical across multiple languages. Using GPS location, Humetrix will automatically translate and speak symptoms, medications and other pertinent health information into the local language, of which 25 languages are available.

Drawing on a database of 4 million medicinal products, Humetrix's technology can help users find medications in a different country that doesn't carry that exact drug but has another of a different name with the same active ingredients.

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