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The Future of Pharmaceutical Marketing

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The goals and methods of pharmaceutical marketing are undergoing rapid evolution. Many new methods are developing and being employed to reach and engage patients, physicians and all stakeholders. Among them we see the growing and greater importance of Big Data, fueling strategic, segmented and targeted marketing; the personalization of content culled from deeper analysis and more important input from the very people marketers want to reach; and the need for relevant, compelling content that truly connects with all within the healthcare community. Substantial strides are underway.

But where is this all heading? In other words, what will the future of pharmaceutical marketing look like as we enter the new year. To gain insight, *PM360* asked 12 experts the following questions.

- What trends do you currently see in pharmaceutical marketing that will impact the way marketers reach patients, physicians and other stakeholders in 2016?
- Are new avenues being explored in pharmaceutical marketing and what are they?
- What will be the biggest challenges for marketers in creating brand loyalty among patients and prescribers and how do you think it can best be approached?
- Where do you see the most development or emphasis occurring in new marketing methods, in areas including digital, multichannel marketing, websites, print, video, television, etc.?
- In marketing content, what is more likely to be successful for patients? For physicians in private practices, ACOs, IDNs, and hospital systems?
- Where is marketing headed in terms of Big Data, data analytics, targeting and segmentation, etc.?

Paul Shawah



Paul Shawah
Vice President
of Product Marketing
Veeva Systems
paul.shawah@veeva.com

In 2016, we are going to see marketers take a new approach to reaching key stakeholders across a number of areas—from clinical care and scientific research to payers and policymakers. The number of stakeholders who influence therapy decisions—as well as the amount of data about these stakeholders—has grown dramatically. Additionally, this information is becoming more detailed, diving way beyond traditional data sets to include things like relationship networks, channel preferences, attitudes and behaviors.

Achieving competitive advantage will require using insights derived from this new wealth of quantitative and qualitative information that was historically difficult to capture and analyze. For example, what is Dr. Smith's sentiment towards a competitive drug? What is the best way to engage Dr. Smith? What is his opinion of a certain treatment area? Such "sentiment" and derived insights will enable medical teams and marketers to have deeper, more on-point conversations with the right stakeholders.

With new insights will emerge a new data delivery model—potentially transformative in its impact on the use of stakeholder data in the life sciences industry. In 2016, data delivered as a one-off service (and its delays) will be replaced by a data subscription that's automatically kept up to date. Instead of having to stitch together disparate information from different data

sources, organizations will now have continuously up-to-date data, consolidated and easily accessible for all customer-facing teams. Combined with new qualitative insights, the industry will enjoy a much deeper understanding of what motivates each stakeholder, informing both commercial and medical strategy with a level of detail never seen before. The result will be increasingly relevant, smart conversations with industry leaders that will strengthen relationships with all key stakeholders across the product lifecycle.

Mike McCartney



Mike McCartney

Senior Vice President,

Account Director

GA Communication Group

mmccartney@

gacommunication.com

Our ability as healthcare marketers to deploy impactful creative and meaningful messages in new mediums will continue to possess the potential to influence target *behaviors*, often associated with accelerating awareness and trial.

However, to truly shift *beliefs*, which are essential to driving adoption and advocacy with both professionals and their empowered patients, we will need to use marketing methods that incorporate seamless, personalized experiences that provide evidence-based information and support positive patient outcomes across a continuum of care.

Personalized Marketing is the approach that puts your target in control. We serve as the facilitators—delivering relevant content and providing access to timely information that addresses their unique needs, where, when and how they choose to engage. Understanding their individual journeys, emotions and motivations is paramount to optimizing these engagements.

Evidence-based Marketing recognizes that in today's environment decisions are driven by data, and our audiences trust their circles of influence for guidance. The relationship between provider, payer and manufacturer will become increasingly interlaced with greater financial transparency and ability to measure outcomes.

Outcomes-based Marketing focuses on supporting all stakeholders across the continuum of care to create positive patient experiences. Payers and providers are motivated to adopt therapies that treat the patient, not just the condition, in ways that do not overly tax their resources.

Discovering incremental communication opportunities to support beneficial outcomes for patients and practitioners can at times be as critical as the therapies themselves. In light of the pressures placed on providers today, juxtaposed with the potential benefits realized by partnership with manufacturers, our opportunities to connect via new engagement strategies and marketing methods are tremendous. Using these three filters to develop your programs will help ensure that your team can consistently hit the mark.

Michael Austin



Michael Austin

Executive Creative Director

PALIO, an inVentiv Health Company

Michael.Austin@

inVentivHealth.com

“Mr. Gorbachev, tear down this wall!” A sentiment famously expressed 25 years ago is alive and well today in American healthcare marketing. Oncology brands doing DTC television spots; PR agencies birthing advertising campaigns; the “for healthcare professionals only” distinction wasting away into oblivion as patients become adept at seeking out and understanding clinical information and advocacy groups spearheading treatment guidelines versus just raising money. This mash-up of disciplines, capabilities and knowledge will reverse the trend of highly specialized agencies doing highly particular things. The great idea will finally be free to not only come from anywhere but also go anywhere. We’ll stare at chunks of the wall like relics from another age.

Today, physicians are loyal to their clinical experience. Always have been. Patients are loyal to their habits. Always will be. True brand loyalty only emerges when a brand manages to intersect by being more than a collection of facts. By owning a specific narrative that transcends endpoints, people have something to connect to, be they patients or physicians.

Before there was an app for that, there was a pill for that. But it seems research and development has zero chance of keeping up with the proliferation of healthcare apps launching every day. However, those apps are mostly focused on measurement taking and history keeping. Not far off is the day of the \$300 app, because with that price tag comes perceived value and inherent trust in the application. Perhaps insurance will cover it but in either case, the patient will be a well-informed consumer aware of the price tag for the service they're receiving. It's hard to trust your well-being to a service you get for free. Premium priced apps will begin to act as the conduit to the administration of actual care. Brands will likely even begin to weave paid prescriptions to app subscriptions, like HBO GO. Apps will shift from supporting healthcare to dispensing it.

Amy Parke



Amy Parke
SVP

Ashfield Healthcare
Communications

Amy.Parke@
ashfieldhealthcare.com

The most development emphasis occurring in marketing methodologies seems to be on social media. It is an established fact—patients are online seeking information via their computers, notebooks and smartphones. Many times they reach out in social media environments to find these answers. Patients seeking validation,

connection or simply answers to their questions are actively reaching out to other patients who share similar experiences, who can provide advice and guidance and connect them to disease advocates. Social media allows them to do this.

We also find more and more statistics demonstrating the increasing importance of Millennials—their digital communication preferences are on the rise. So it makes sense that we begin looking at how we can reach our audiences via social media—scary as that may be for pharma! Our content can only be effective if delivered to the right audience via the right channel, therefore we must challenge ourselves to effectively tackle the social media space.

Many companies have begun to dip their toes in the water, offering some social media solutions such as Twitter as a channel for patient support, or YouTube channels, which focus on patient stories. These are a great start but pharma will need to stay on the cusp of the latest trends to remain effective and simultaneously develop marketing efforts to work through multiple social media channels. This will require developing or re-developing content to fit these audiences and channels.

One size does not fit all in digital outreach, particularly in social media. Content that resonates with patients that is in an accessible place is the new focus and pharma is employing people who can provide this with the appointment of Chief Patient Officers, Multichannel Directors and Social Media Analysts, etc. We will continue to see these positions and teams build within pharma to be able to give the social media realm the attention it needs and will require in the future.

Mark Schwitzenberg



Mark Schwitzenberg

Executive Director,

Urology Marketing

Astellas US

mark.schwitzenberg@astellas.com

Changing media

consumption habits are drastically evolving how we communicate with our patients. Not long ago, broad-based communications channels, such as a 60-second television advertisement or educational websites, typically comprised 80% of the required efforts, with all other activities serving as *surround sound*. As consumers migrate to video on demand and mobile viewing, it is critically important to tailor our communications approaches to meet a wide array of communications touchpoints. No single effort can be expected to do the majority of the work. An efficient communication plan should be comprised of a multitude of approaches, all aimed at delivering content at the moment when customers are ready and able to listen.

Another critical trend is the role of collaboration. As healthcare transitions away from an activity-based model to an outcomes-based model, the opportunity for industry to collaborate with providers, payers and institutions is dramatically increasing. Treatment regimens can no longer be viewed in isolation but rather should be considered as part of a network of tools designed to deliver quality care and optimize patient outcomes. A significant

opportunity is available to truly partner in this changing landscape to benefit more patients and create enhanced value.

Prescribers and patients have come to expect that our brands and their respective messages will be tailored to meet their needs, or at a minimum, not to be a one-size-fits-all approach. Additionally, we need to find appropriate uses for social media channels if we hope to remain relevant in the evolving healthcare environment. Given the regulated nature of our industry, it will be difficult to become truly personalized and dynamic, but if we do not find ways to adapt, we risk being marginalized in the future landscape.

In the past, creating compelling, patient-focused content has not been a core competency for healthcare providers, but it is a tactic they must embrace as “user-centered models” yield the most engagement.

David Nakamura



David Nakamura

Founder

Natrel

dhnakamura@natrelusa.com

Content creation must serve your audience, not just your brand. When it comes to generating content, each target audience within the healthcare sector has unique considerations, but none is exempt from the core principles of successful

marketing: Engaging the audience and establishing credibility.

The Internet gives patients access to an abundance of information, but patients want more than a Wikipedia page regarding their condition. An essential step in engaging patients (and their caregivers) is understanding what they need, when they need it, and how they learn. Two key needs:

- Emotional and practical support partnered with clear, balanced, and timely education that is accessible wherever they are emotionally, physically and socially.
- Content that balances rich, accurate medical information with an easy-to-digest format. This means images, videos, apps and social platforms that allow patients to connect and talk to other patients.

Another part of effective engagement is knowing where to reach patients—and their online activity is increasing. Any successful marketing effort requires an integrated digital and analog effort, including web, mobile and social platforms. Truly engaging patients is less about advertising to them and more about creating an authentic, relevant experience that will earn the brand a place in their lives.

Scaling content efforts is not just about expanding the size of your brand's reach, but more about deepening the level of engagement with patients in their communities. When a brand provides health and wellness tips, current medical news, and discussions of broader health topics mixed with a communal experience, it helps patients value the experience as one that provides education *and* comfort.

In the past, creating compelling, patient-focused content has not been a core competency for healthcare providers, but it is a tactic they must embrace as “user-centered models” yield the most engagement.

Jason Luis



Jason Luis

VP, Media and Analytics Strategy

Giant

Creative/Strategy

jluis@giantagency.com

Increasingly, marketing effectiveness hinges on the use of data from multiple sources to create comprehensive and real-time views of its targeted audiences. The varied applications of this data and analytics will deliver more personalized, compelling and useful experiences to address information needs. In the not too unrealistic utopian future, a pharma marketer could target and select a specific doctor and present her with the ideal message that influences her to prescribe one treatment over another. The system would make this decision in real time and perhaps use thousands of input variables such as prescribing patterns, website behavior, email response rates and customer service call records.

It may go even further to include social media originated attitudes, geographical location, conference attendance and even analyze the doctor's social network. To be sure, this would be the perfect synergy of right message, timing and frequency. With this said, the industry must overcome the mindset that pharma is isolated from widespread consumer trends. In short, it must embrace change and take calculated risks.

At the same time, marketing budgets remain flat and pharma marketers are averse to big bets and our clients have been focused on extracting the most yield on their existing investments. Big bets in social or CRM programs are off, while budgets flow freely to search engine optimization, website analytics, digital media attribution, geographic targeting and segmentation. These collective activities present proven ROI friendly opportunities that ensure our client marketers maximize their exposure and engagement to their target audiences. The top 20% of our more advanced clients are leveraging content management solutions, attribution analysis, and some are dabbling in marketing automation. Many are employing user-level data collection across a non-personal channel that in one to two years will power big data analytics and real-time predictive model deployment.

Lori Tierney



Lori Tierney

Vice President,

Commercial Operations

AstraZeneca

lori.tierney@astrazeneca.com

Given rapidly changing technology and the rise of consumerism, we no longer look at our marketing channels as separate entities. We are now required to integrate all sales and marketing channels, and as a result it is no longer effective to have a single

exclusive message across multiple platforms. The consumer—a physician, patient or caregiver—is receiving information from various sources and expects customized information. Our field representatives will continue to cultivate the strong personal face-to-face relationship with our customers. Outside of traditional customers, the physician, patients and caregivers seek information about our products and we need to think differently about how we best customize our messages with the end user in mind.

Big data, today has many meanings. In our industry, two important areas to consider are consumer data and organized customer group data. Consumer data is incredibly important so that we can test new hypotheses and enhance the resources provided to patients, including clinical disease support and access services. Consumers are now willing to opt in and share their healthcare journey, which gives us an opportunity to do things a bit differently than we have in the past, including helping patients as they start on our medicines over the course of their treatment journey to ensure they are adherent to their treatment and receive the full benefit of the medicine.

Secondly, data is changing to capture the needs of organized customer groups. We know these entities put a heavy focus on health outcomes. We need to capture insight data on these outcomes to change the way we structure our clinical development plans. This data will help us to better design our clinical trials to ensure that we are studying the medicine in a way that has impact and addresses a need of our organized customers, in addition to providing a clinical benefit to patients.

Steve Wray



Steve Wray

CEO

Cadient, a Cognizant Company

stephen.wray@cadient.com

A significant change is underway in how brands plan for, staff and execute new product launches. Specialty medicine must reach increasingly narrow audiences with treatments that are often complex—both in terms of the MOA and the treatment regimen itself. In this new launch environment, several strategies must be addressed to achieve accelerated brand success:

Listen Deeply: First and foremost, a legendary launch begins with legendary listening. Brand teams need to truly understand their customers' point of view—not just from a clinical perspective, but also in terms of how their life is impacted. Both quantitative and qualitative research is essential early in the clinical trial process to begin understanding deeper levels of customer behavior and experience.

Channel the Brand Story: Armed with unique patient insights, brands need to then create content around a compelling brand narrative. This brand story must do more than simply restate the approved indication, but point to the ways in which the product aligns with true patient needs. Once a great brand

narrative is in place, then appropriate media selection is critical. In today's intense and highly dynamic digital marketing environment, content cannot simply be pasted from one channel to the next in the hope it will resonate with a broader audience. Instead, the unique capabilities of each channel must be aligned with key points in the brand narrative.

Create With Customers: Another important transformation occurring in the space: The brand narrative will no longer be developed in isolation, but instead co-created directly with customers. In other words, the brand narrative will no longer be set in stone at the point of launch, but evolve over time based on ongoing interaction and input of customers.

In today's rapidly changing digital landscape, successful launches will be built upon the foundation of legendary listening, a compelling brand narrative, inspired channel selection and ongoing customer collaboration and co-creation.

Osnat Benshoshan



Osnat Benshoshan
Chief Marketing Officer
and Head of Strategy
SERMO

osnat@sermo.com

Doctors have been under

greater pressure than ever to focus on the business of healthcare instead of just being good practitioners. New regulations have forced doctors to work differently, from certification to electronic health records. They are busier than ever, between medical forms, patient visits and having to adapt to new technology. The result: An overstressed population of doctors who feel besieged, who lack a voice, who work in isolation and who feel a great need to share and unite with their peers. Social networking has enabled them to connect over the turmoil in healthcare, but to also start sharing medical knowledge.

Also, traditional methods of disseminating medical information are slow and becoming obsolete as digital communication technologies advance. Breakthroughs in medicine happen every day, but they remain undiscovered because doctors don't have efficient channels to share insights. Social media has great potential to accelerate healthcare by providing doctors open access to one another and the ability to crowdsource medical information via the collective wisdom of a community.

Healthcare is in transition globally. Disease states are more complex, and the economics of healthcare are not working. Varying healthcare systems around the world result in varying patient outcomes. Global social is influencing doctors to try new techniques as they learn from one another.

Pharmaceutical companies continue to have a critical need to engage with doctors. However, traditional means of engagement are becoming less effective as doctors have less time, interest and ability to engage face to face. Pharma understands that social has ushered in an era of authentic bi-directional communication. Due to the strict regulatory environment, pharma has been slow to adopt social. However the FDA's long awaited issuing of social guidelines has encouraged pharma to participate in this space and we are seeing a heightened increase by pharma to start engaging socially.

Shaun Urban



Shaun Urban

Managing Partner

Ogilvy CommonHealth Worldwide

shaun.urban@ogilvy.com

What we have learned over recent years is that interruption-based marketing has become less and less effective. In order to effectively communicate with our customers today, we must engage with them when, where and how they desire. In addition, there is an increased importance in ensuring that our campaigns are driving the desired behavior change our clients expect with customers.

With the adoption of electronic health records within physician practices, opportunities now exist to communicate with and educate HCPs within their customary workflow, resulting in a greater consumption of content. In addition, there is an opportunity to apply behavioral economic techniques to our marketing communication approaches that will help brands engage with stakeholders more effectively.

As society continues its quest to achieve well-being, and families and patients are required to pay more out of pocket for healthcare, today's healthcare consumer has never been more engaged and knowledgeable. In parallel, the biopharmaceutical industry largely remains steadfast in their R&D focus of

specialty medicines that truly meet unmet needs and subsequently come with a higher price tag for our healthcare system. And payers are increasing their efforts to manage the growing specialty drug trend through more intrusive utilization management efforts and greater patient cost sharing. This requires marketers to increase emphasis on key areas of the marketing mix to ensure success.

Communicate the *value* of medicines to all stakeholders based on the unique needs and financial priorities of each customer. **Invest** in state-of-the-art reimbursement support services to remove the reimbursement hassle factor and to ensure patients can start (and stay on) therapy without delay.

Demonstrate real-world-evidence product benefits to differentiate in a data-rich environment and migration to outcomes-based reimbursement.

Tim Frank



Tim Frank

Managing Partner

Triple Threat Communications

tfrank@

triplethreatcommunications.com

We're looking at new ways of changing patients' behavior. The conventional approach tries to engage the rational part of our minds—yet 95% of the time, people's behaviors

emerge from the emotional part. We take a behavioral-science approach built around actions, not attitudes and encourage the development of communications aimed at that 95% of a person's instinctive, behavioral machinery. The aim is not to simply motivate, but to trigger behavior reflexes that can be measured.

But with physicians heavily pressured to write generics, it's not easy to create brand loyalty. Creating an emotional connection to the brand is key. Physicians want what's best for their patients. So it's by not just focusing on features and benefits, but by putting your brand story in real-world, patient-focused terms, HCPs will form connections that endorse your strategy.

Clients are realizing that "regulated" doesn't have to mean "boring." Thanks to new web technologies, we are starting to break away from the stale pharma website and design more immersive, responsive ones. When coupled with relevant, engaging content, we can deliver the information our audiences are searching for much more effectively.

Across audiences, it's important to leave a lasting emotional impression. We can do this by telling compelling stories. Engage physicians and patients with an interesting hook so they tune into to your story. Then unfold your narrative with a plotline that builds interest and leads to a powerful message.

We've just scratched the surface in terms of the amount and type of data available to marketers, allowing them to make smart decisions and provide relevant content and messages to the right person at the right time. As things like hyper-IP targeting, geo-locating, NFC, user data and user behavior continue to evolve and merge, we'll have new opportunities to reach our customers in meaningful ways. The big challenge will be to balance big data with Big Brother.