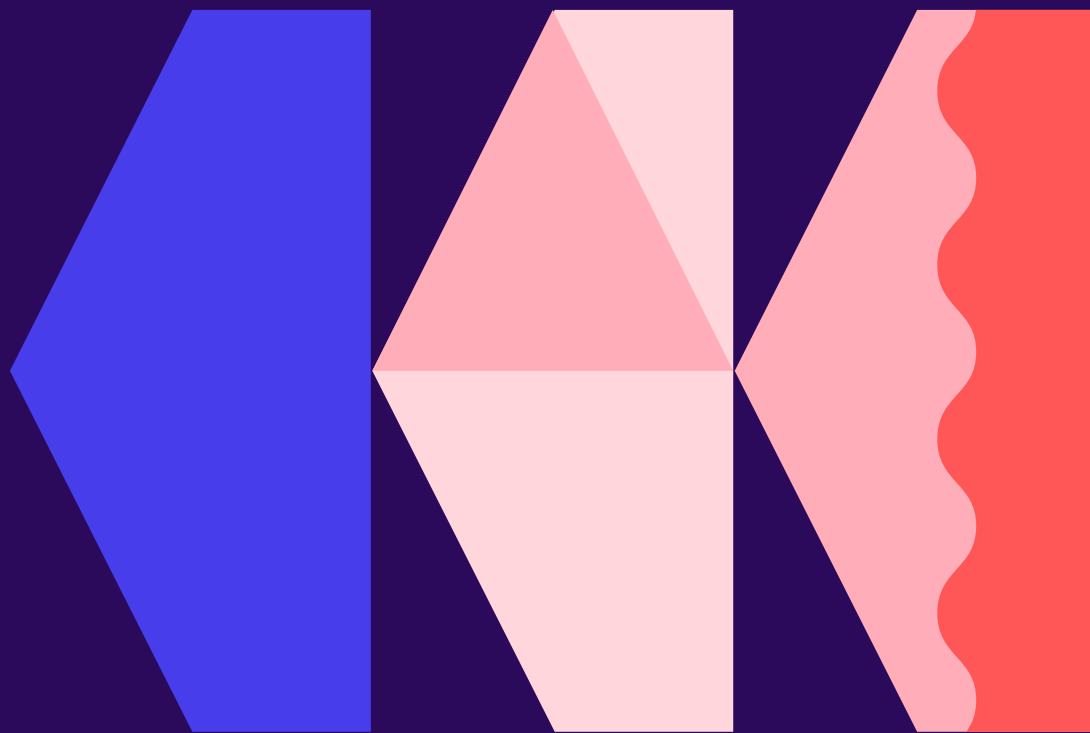


# The changing face of pharma marketing

New challenges and  
new opportunities





Justin Diver  
VP Sales  
Papirfly

## The role of marketing in the pharmaceutical industry has changed exponentially after a long run of things remaining much the same.

As the world starts to embrace preventative care and patient advocacy, pharma companies are having to adopt a new approach; one that is more focussed on the needs of the end-user.

Traditionally, the prices of products (which often had only very subtle differences for the majority of consumers) were determined by the companies that made them, without necessarily having to reflect their true value to patients. For years, leaving marketing to sales reps and relying on the number of sales or regular price hikes was enough to keep big pharma brands comfortably ahead in this cash-rich industry. However, societal, technological and behavioural shifts have caused tremors in the status quo.

The global market for pharmaceuticals is currently at \$900 billion and this figure is expected to exceed \$1.1 trillion in the next few years. Needless to say, big pharma is still big business, and with an increasing number of companies fighting for their share in the sector, marketers need to be looking for new ways to adapt in time with the industry and innovate ahead of the competition.

Here, we'll be unravelling how the pharmaceutical industry has evolved, what has caused the most significant changes and what marketers need to be doing to keep up their momentum and take full advantage of the new opportunities they present.

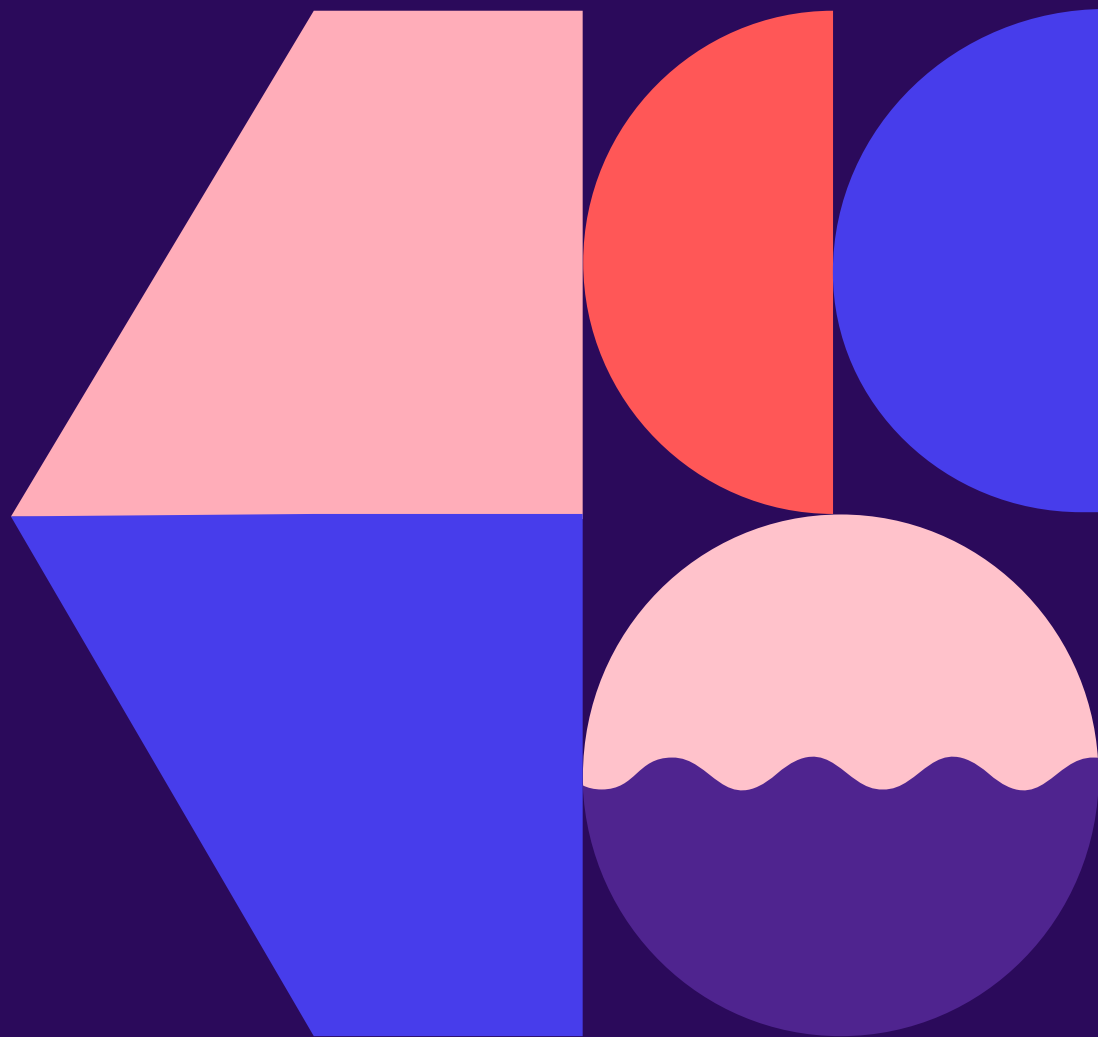
**Enjoy**



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# From product sellers to patient advocates





It is no longer enough for pharmaceutical companies to stand out through incremental innovation, copycat products, or simply by selling vast quantities of pills. Today's patients and healthcare professionals are looking more closely than ever at where a pharma brand can cement its value in their lives through useful interactions.

This has made it evident that the products offered by pharma brands need to prove their value to consumers as competition increases every year. For an industry that has traditionally been slow to adapt compared with other sectors, this realisation has not been taken lightly.

During March and April 2020, amidst the first peak of the COVID-19 pandemic, [Deloitte spoke to medtech leaders](#) about their strategic priorities and the risks and challenges that the industry is facing. They found that a huge majority (88%) of respondents rated advances in technology as a top challenge, followed by policy and regulatory activity, and changes in consumer attitudes, behaviours and spending (63%).

Our behaviour as consumers and our ever-increasing reliance on digital services are intrinsically linked. As technology improves, our expectations become higher which, in turn, results in further technological innovation to meet our demands.

Perhaps the most widespread change in attitudes to healthcare is how Google and social media platforms have been embraced as the first point of call for health information. We now expect relevant answers from pharmaceutical brands and healthcare providers presented to us immediately, in a way that's quick and easy to digest.



## According to recent World Health Organisation (WHO) data...



- 80%** of health-related consultations are carried out on Google or other search engines
- 1 in 20** searches on Google relates to health
- 60%** of adults in Europe (that are active on the internet) search for information about their health (72% in the US)

\*Source: CareerAddict

As technology continues to develop in a more consumer-focused way, the trend is likely to continue. This is putting more pressure on pharmaceutical marketing to meet the level of digitised service that audiences have come to expect in almost every other aspect of their lives — from hailing a cab to paying their taxes, a seamless digital experience is expected. **But what does this change in consumer expectation mean for pharma?**

In a survey conducted by Econsultancy and Adobe, 75% of respondents said that they want the same experience in healthcare that they are receiving from businesses in other sectors.



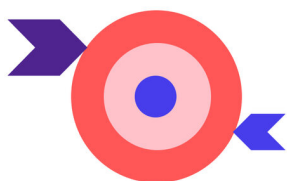
### I want the same experience in healthcare that I get from other businesses...



\*Source: Econsultancy



This survey was part of 'The Consumerization of Healthcare' report and also goes on to explain that:



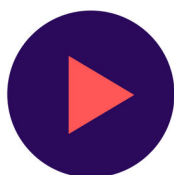
62%

62% of respondents say that they expect their providers to offer online appointment booking, with 44% stating that this functionality is "very important"



84%

84% of consumers say that they should be able to exchange secure messages with their healthcare provider



60%

Nearly 60% of respondents under 55 years of age said that it would be "life-changing" or very useful to be able to interact with healthcare professionals via video chat instead of making a routine visit



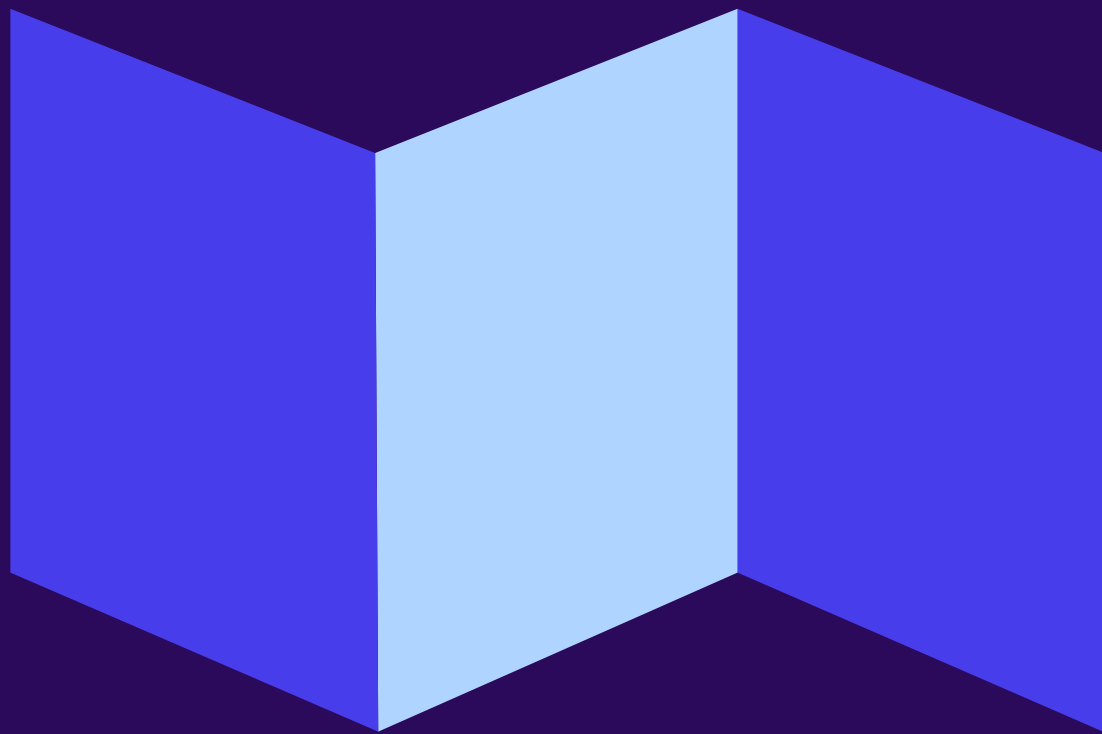
50%

50% of respondents under 35 also said that they would opt for a longer video appointment over a shorter in-person appointment

\*Source: Econsultancy

Even before the COVID-19 pandemic, which has forced a major uptake in online services, pharma marketers had begun to embrace this digital-first shift in consumer behaviour.

# The driving forces behind consumer expectations in pharma







Shifts in consumer behaviour can seem as if they have taken place overnight. In most cases, however, they are caused by gradual changes in society.

To better understand patients and determine how your marketing can meet their expectations, it's important to know what's behind the evolving behaviours and attitudes towards pharma products.

## Digital literacy

Digital literacy is the level of skills needed to live, learn, and work in a society where communication and access to information are achieved through predominantly digital channels. It is a life skill that's improving with every generation and, as audiences become more accustomed to online tools, more opportunities arise for pharma companies to leverage digital channels in ways that make life easier for their customers.

The diagram below outlines some of the key areas in which healthcare has embraced digital.

### Digital Health Ecosystem



\*Source: WHO



As they become better acquainted with digital channels, consumers can be far more particular about the services they receive and the products they use. Patients are no longer passive recipients of directions from doctors and, instead, are using new resources to take a proactive role in managing their own health.

It's important to note, however, that while the digital healthcare revolution is generally seen as a resounding success, there is a danger of relying too much on digital literacy and patients having access to technology. This could exclude the people who have the greatest need for healthcare.

## Data privacy

Every industry has been affected by data protection regulations. But because pharmaceutical companies hold a myriad of sensitive data collected from healthcare professionals and patients, they will have their own unique privacy considerations.

Caring about personal data is part of the general move towards patients having more control over their healthcare. Consumers expect to have a say in what data gets shared, and what doesn't, and to be able to find out what it's being used for.

When GDPR was introduced across Europe in 2018, there was a major change of mindset concerning data protection. Previously, consent to collect data could be exploited by linking it to the provision of a service, free wifi, for example. This resulted in people being targeted with vast amounts of marketing emails for unspecified amounts of time, building scepticism and mistrust surrounding any kind of branded communication.

For pharma marketing, tighter data restrictions have undoubtedly been a good thing. Forced to reconsider the volume over value approach, pharma brands are seeing the benefits of creating communications that are more tailored to the needs of individuals. It has pushed the focus towards:

- Reaching consumers through the channels they use most regularly
- Painting a clearer picture of who their audiences are
- Understanding how to reach customer segments

This has allowed pharma companies to use data to go beyond product development and help patients in a more direct way. The result is more useful forms of retained information in the long term.



## mHealth

With an estimated 325,000+ mobile health (mHealth) apps available, patients are more connected than ever. mHealth apps have been instrumental for pharma and companies wanting a competitive edge, allowing them to reach both patients and the healthcare professionals who prescribe their products and treatments.

Data shows that the number of apps produced by pharma companies has more than tripled from 305 in 2013 to 988 in 2016, and these pharma apps accounted for 5.6 million out of 3.2 billion downloads generated overall by mHealth apps in 2016. That number has shown no signs of slowing down since.

### mHealth apps have proven mutually beneficial for patients, caregivers and pharma companies:

- **For doctors and healthcare professionals**, they are essential tools that have huge potential for making their day-to-day job much more efficient. Whether that's having the ability to respond faster in emergencies by receiving immediate notifications that provide them with relevant details about the situation, or assisting the management of long term chronic diseases by helping them monitor their patients' medication, diet and lifestyle more easily.
- **For patients and the general public**, apps can help minimise unnecessary trips to the doctors, get access to prescriptions or speak one-to-one with a healthcare professional without leaving the house. They have also helped people become better at caring for themselves by providing a wealth of personalised information about the medication that can help them.
- **For pharma companies**, the roll-out of useful apps can be a game-changer in terms of learning how people are using their products. By facilitating direct interactions with patients, they can find out when and how they are taking medication, in addition to their overall satisfaction with the product via real-time feedback. mHealth apps are also helping pharma brands build better relationships with doctors by making themselves an indispensable tool that's with them 24/7.

In May 2020 there were over 318,000 mHealth apps in top app stores worldwide, with more than 200 new health apps being introduced every day.



## Startups entering the market

While well-established organisations have had to reinvent parts of their business models in order to meet customer expectations, nimble startups using revolutionary tech have been able to take advantage of the disruption.

Some of the most interesting pharma startups using innovative tech include:

### olarisQB

Combining quantum computing and AI, this US-based startup offers drug discovery solutions for precision medicine. As well as having the ability to search through large, unorganised medical information, the platform can filter for drug toxicity effects in the process. This enables them to search the novel chemical space faster, cutting the lead time for preclinical drug candidates.

### RealMeds

This startup based in India provides pharmaceutical manufacturers with a unique QR code for their clients' products. Their solution allows the scanning of products for inventory auditing as well as processes for distributor and customer point of sale. This creates a single source of information where transactions are recorded for all stakeholders in order to check for discrepancies.

### Arctoris

Focussing on drug discovery workflows, Arctoris has been instrumental in helping their clients conduct experiments remotely. Through a robotic lab platform In 2020, the company entered a number of collaborations to develop drugs for COVID-19, including with the Korean company Syntekabio and with the Hong Kong-based artificial intelligence (AI) specialist Insilico Medicine.



## Tech giants moving into healthcare

As well as small startups causing concern for big pharma firms, tech giants including Google, Apple and Amazon are moving into the sector, acquiring existing pharma companies along the way. One of the biggest advantages that these companies have over new pharma-specific startups is deeper pockets and significant backing from key shareholders to expand into the sector's valuable market share.

Tech giants also have an abundance of existing resources at their disposal which they can use to bring accessibility, convenience and user experiences from their products and services in other sectors into healthcare.

From 2017, Amazon Pharmacy has been allowing its customers to purchase prescription medications through the Amazon online store and has since expanded further into the pharma market.

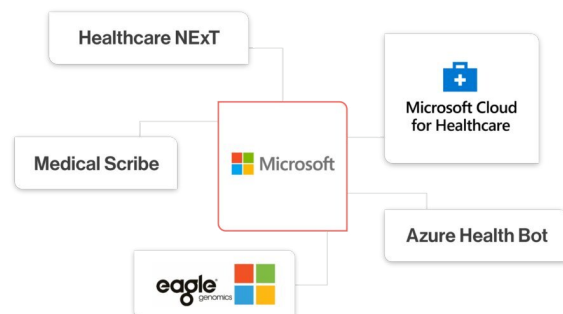
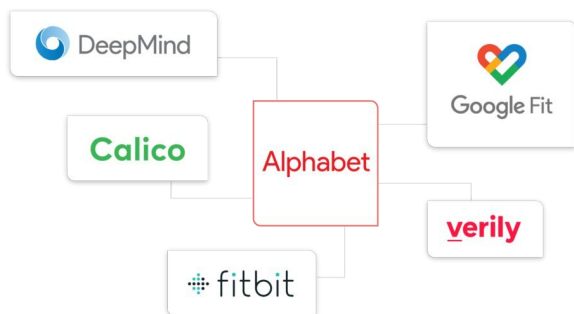
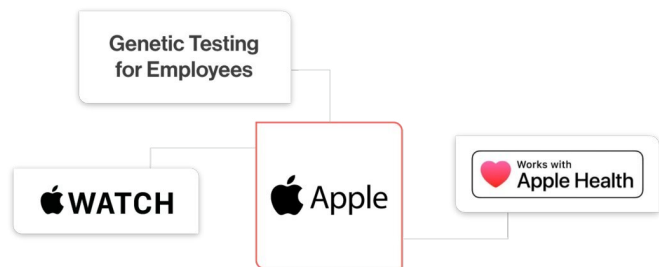
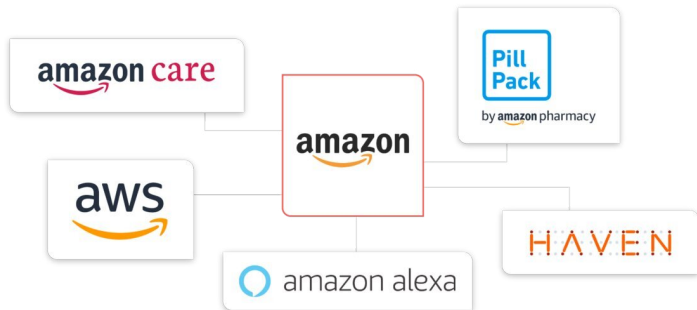
In a 2018 press release announcing Amazon's acquisition of PillPack, a service that sends prepackaged prescriptions to patients along with a helpful dispenser, Jeff Wilke, Amazon CEO of Worldwide Consumer, said "PillPack is meaningfully improving its customers' lives, and we want to help them continue making it easy for people to save time, simplify their lives, and feel healthier."

To align the service with its guiding principles: 'customer obsession rather than competitor focus, passion for invention, commitment to operational excellence, and long-term thinking', Amazon uses its software platform to manage each patient's medication, coordinate refills and renewals, and make sure that shipments are dispatched promptly.

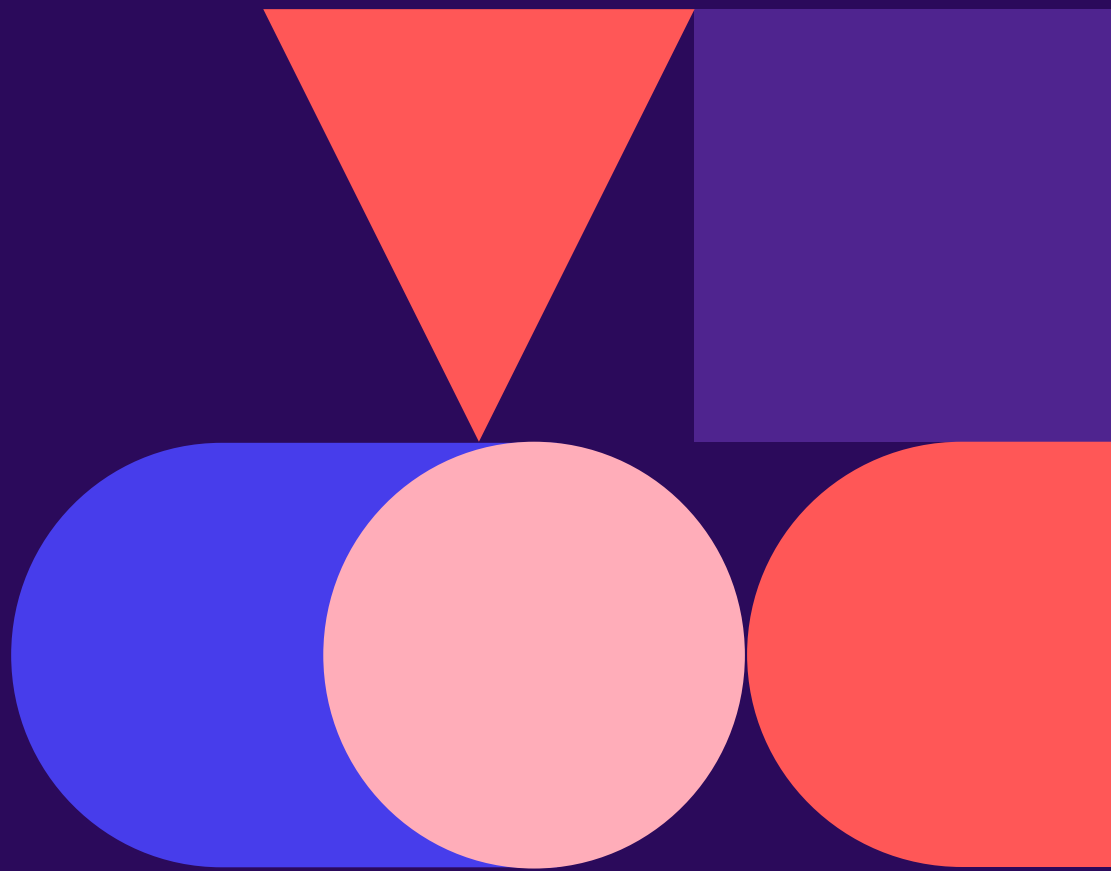
At around the same time, Apple had begun to dedicate a huge part of their business to the healthcare space. In parts of the world where the majority of the population is already familiar with their products and services, iPhones, Apple watches and apps can be used in conjunction with each other. As well as making life simpler for patients, Apple has been helping healthcare professionals monitor the medication they are prescribing, receive notifications about appointments and more via the devices that they already use on a daily basis.



## Where big tech is moving into healthcare (2021)



# New challenges for global pharma product launches





## When pharma brands fail to evolve, successful product launches become more difficult to achieve.

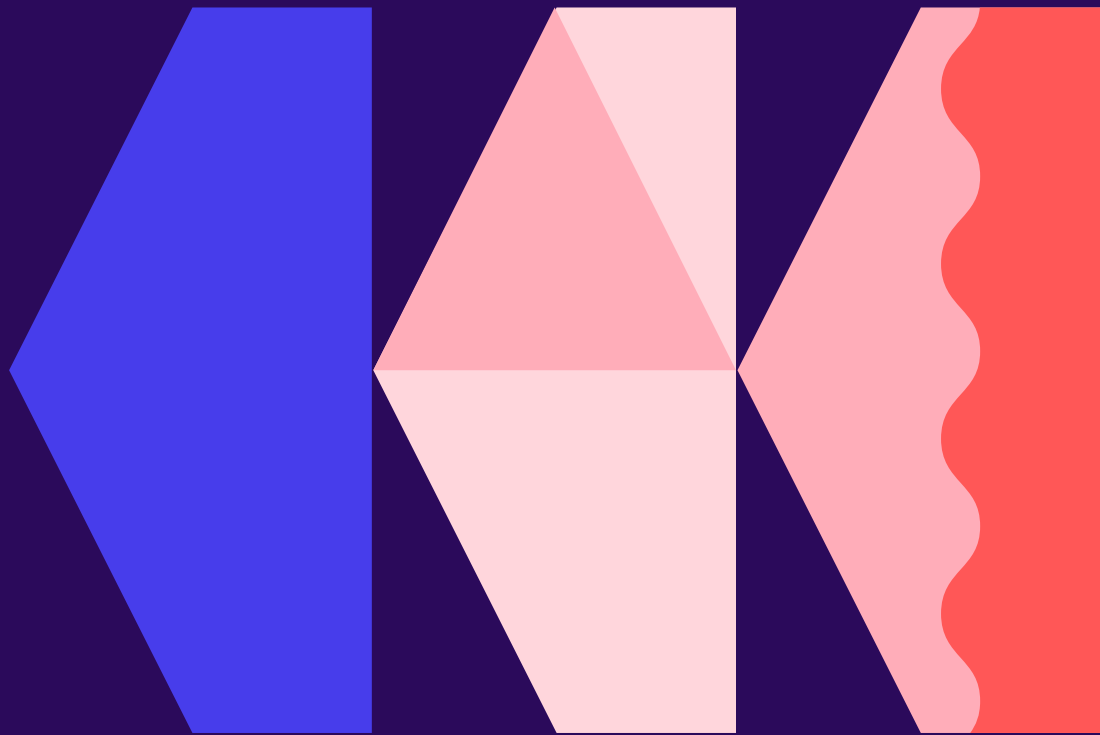
According to research by Bain & Company, nearly 50% of product launches over the last eight years have underperformed, and a quarter don't even get halfway to their sales target.

Some of the most notable challenges that pharmaceutical marketers have had to overcome include:

- **Accounting for the rise in chronic diseases**  
Diabetes and many other chronic diseases are increasing across the globe and as a large number of countries raise the retirement age, many people are still working when these diseases start to become a greater risk. This in turn will decrease the value of treatments and medications and rely more heavily on selling large quantities of products to make them affordable.
- **Engaging with more informed audiences**  
Brands now have to cater to the demands of inquisitive consumers who have a wealth of information at their disposal and immediate access to competitor products. The launch of a new pharma product should be backed by a multi-channel strategy that spreads digestible information over more touchpoints.
- **The pace of new technology**  
Pharma brands that have successfully adopted tech in their marketing have been able to play an active role in the way people manage their health. By being able to integrate themselves into the devices and platforms that people use day-to-day, pharma brands can build longer-lasting interactions and deeper loyalty with their customers.
- **Standing out over new competition**  
As the boundaries between different types of healthcare become more blurred, it is harder for consumers to decide on one pharma product over the next. Being able to define clear differences between a product and proving its benefits in such a saturated market is becoming an increasing sticking point.



# What tools should pharma marketers be investing in?





**On average, the number of organisations already spending more than 20% of their budget on digital marketing channels will increase by more than 70% over the next six years. So, which tools should they embrace in order to use it wisely?**

## **CRM**

There are many CRM systems out there, but the most appropriate solution will depend on the type of audience you are marketing to and what you want to achieve. The first name that springs to mind is Salesforce, a company that made its name in CRM and comes with a plethora of software integrations.

CRM tools like Salesforce can empower your sales teams with a better understanding of your brand's audience and the automation of routine tasks. The right systems will also provide a clearer idea of the experience your customers are having and highlight areas where it can be improved.

## **Social listening**

The use of artificial intelligence (AI) has helped pharma companies make sense of enormous sets of data much faster and with pinpoint accuracy. As well as having a pivotal role in the discovery and development of new products, AI has revolutionised the way in which they are marketed. Based on the information that's interpreted by AI, pharma marketers are able to deploy far-reaching strategies and make them responsive to new insights gained about their audience.

Social listening is a particular advantage to pharma marketers, allowing them to better understand the trends, pain-points and attributes that drive their audiences' decisions. They can also better analyse their products against their competitors', in terms of usage and side effects.



## Content creation and Brand Activation Management

A successful global product launch requires that your marketing materials demonstrate a true understanding of your audiences in every location. This is much more than just a literal translation from one language to another; images, copy, colours and logos need to pick up on cultural nuances of diverse markets while maintaining strict brand consistency.

During the rollout of global campaigns, solutions with localisation features, including Brand Activation Management (BAM) by Papirfly™, can help you deliver relevant on-brand assets in every market. Post-launch, BAM also helps pharma brands react quickly to local market demands by bringing asset creation in-house. Working to bespoke templates, marketing teams will have everything they need to produce high-quality on-brand materials without relying on external agencies.

## Machine learning

The amount of data in pharma knows no bounds. To make sense of the extensive customer behavioural information generated by modern marketing systems, machine learning is one of your greatest assets.

Tools such as Adobe Sensei, AWS Machine Learning Services and Google's AI Platform can highlight trends, predict behaviour and recommend actions using artificial analysis. The more data they process, the more accurate and insightful they can become.

## SEO

Search Engine Optimisation is likely to already be a key consideration in the day-to-day work of every pharma marketer. But to stay ahead of competitors and keep track of a campaign's effectiveness, they must be equipped with the best systems for the job.

SEMRush is one of the most popular SEO tools out there, thanks to its all-in-one marketing suite and features like TrafficAnalysis, which can help you evaluate a new market or even develop a watertight media buying strategy.

## Messengers and chatbots

Having the ability to interact with patients in any location is moving from a standout benefit to a standard expectation. This can be done through a dedicated app, with chatbots or via social media platforms such as Facebook Messenger or Whatsapp.

By providing direct communication between brands, customers and healthcare professionals, pharma companies can build trust and loyalty by being there with personalised information when customers need it most.



# The shift to customer-centric pharmaceutical marketing is already underway

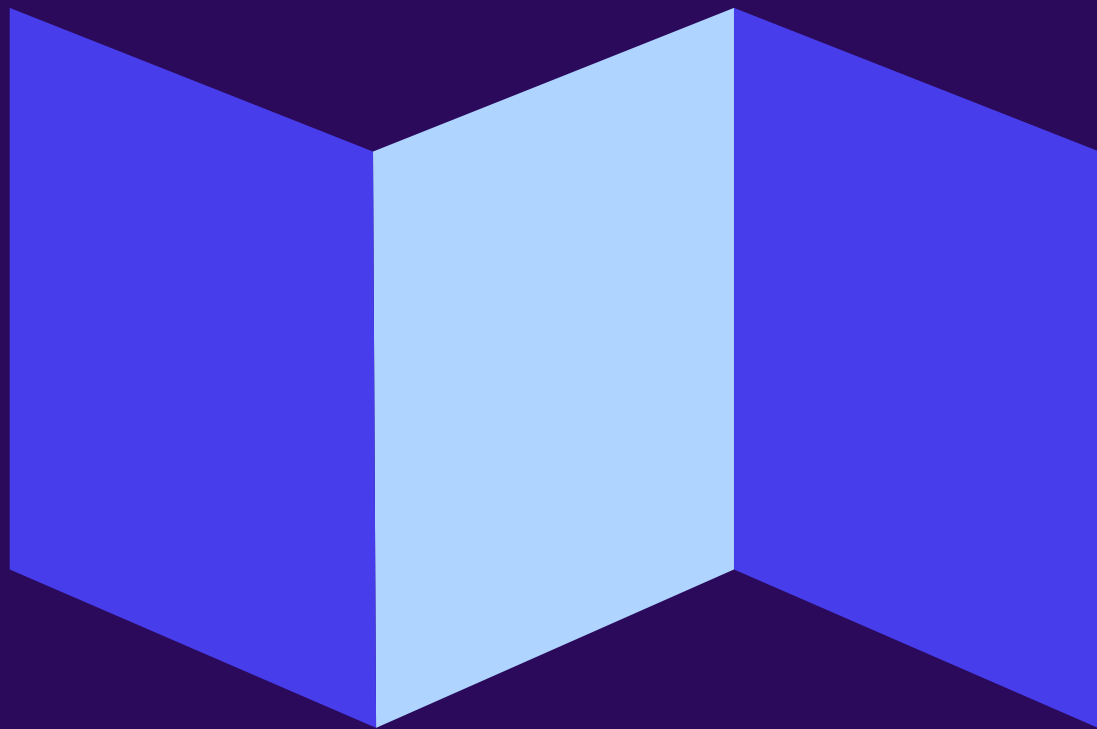
**With more comprehensive consumer insights, pharma companies have the opportunity to evolve traditional marketing approaches and leverage disruptive technologies.**

Big pharma is still miles ahead in terms of profit and global reach, but that's not to suggest new start-ups and tech companies moving into the sector should be underestimated. Hot on the heels of other sectors such as finance and retail where innovation completely overhauled long-standing business models, the digital-first revolution of pharma is set to make a lasting impact.

The effects of COVID-19 have put pharma, and the healthcare sector as whole, into a brighter spotlight that emphasises the value that their products and services bring to the table. Now that consumers are able to take a more proactive stance in managing their health, one of the keys to successful pharma marketing strategy is ensuring that the end-user is at its heart. This makes it absolutely critical to have relevant information ready to be pulled into marketing materials in time to react to consumer demand.

With evolution in marketing the only constant, the big question for pharmaceutical companies is, who will be leading it?

How Papirfly  
makes the  
difference for  
marcomms  
teams worldwide

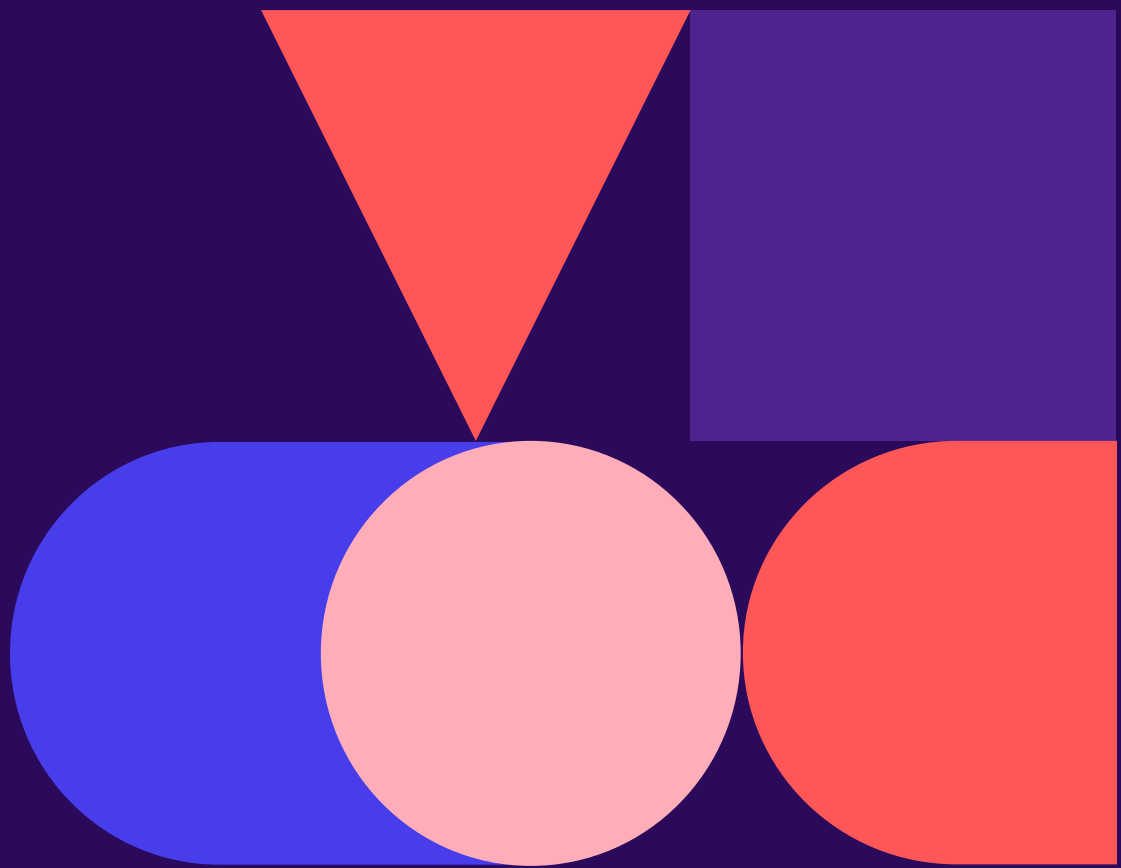




**We hope you've found this guide informative, and it proves a big help in making your own practices more efficient, your content production more cost-effective and your output more consistent.**

As more and more pressures pile onto marcomms departments globally, introducing approaches and tools that cover everything discussed in this guide will be crucial in maximising your marketing communications and pushing ahead of your competition.

# Why choose BAM?





# Empowering global brands

For over 20 years we've been helping some of the world's biggest brands automate difficult marketing tasks, delivering real value in brand governance and employee autonomy.

Every brand has a promise – and ours is to deliver quality, consistency and efficiency for each and every one of our industry-leading clients. If you believe there's a better way for your teams to be more productive, you've found the answer.

BAM by Papirfly™ transforms the way marketing teams work, empowering the creation and delivery of studio-quality assets across all channels in a matter of minutes – strengthening brand governance and providing every location to stay aligned to the brand whilst speaking directly to their customer base.



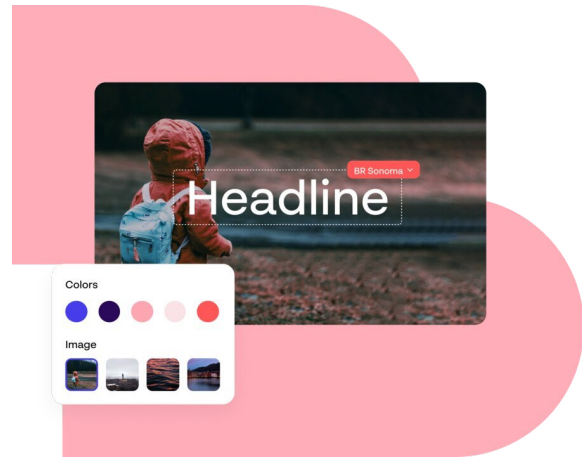


# How can BAM do this from one single platform?

One home for your brand

## Educate

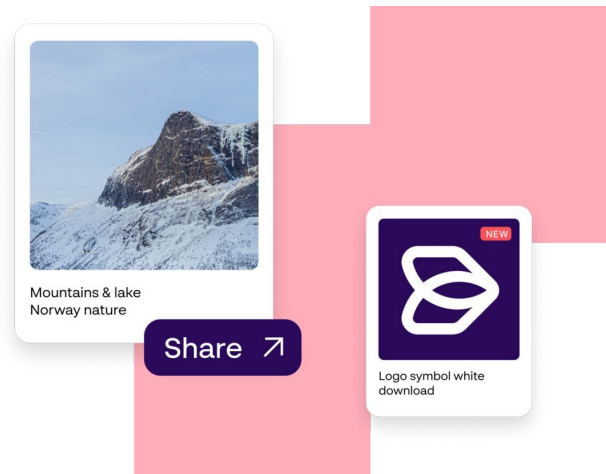
With Brand Hub, prepare everyone across your business to champion your brand with an undisputable single source of truth – cultivating a consistent, global experience of what your brand stands for.



End-to-end brand activation

## Manage & Share

Effectively organise material with Digital Asset Management (DAM), align marketing operations and plan effectively, approving and assessing multiple campaigns – governing usage across all touchpoints and giving marketing teams a clear sense of direction.

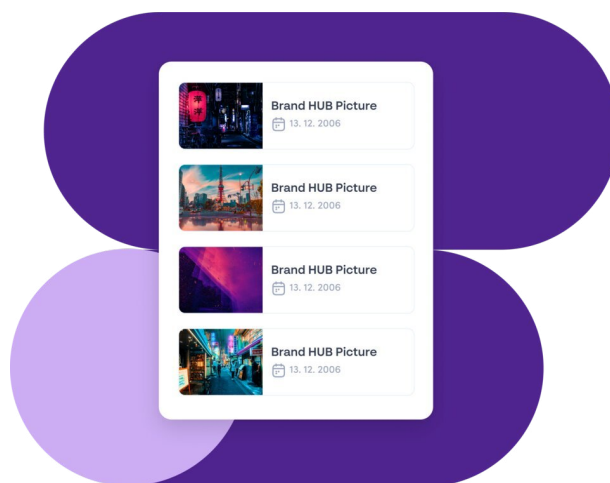




A bird's-eye view of your brand

## Plan & Collaborate

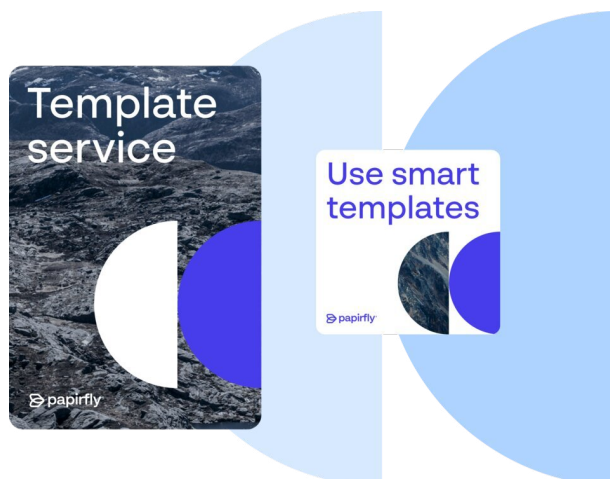
Oversee and align your organisation by creating streamlined processes – giving tailored access across all asset-creation templates as you create clarity around marketing materials and the campaigns they serve.



Asset consistency across your global brand

## Create & Activate

Customise templates so all digital and print collateral is already pre-approved for studio-quality asset creation by in-house teams – our Template Studio provides a positive user experience and peace of mind that you're creating a responsive brand for your global customers.



Driving brand strategy based on valuable data

## Measure & Optimise

Access insightful reports and identify trends and market needs through user-level analysis – comparing different campaigns and gauging success with full visibility of asset creation and volume to guide future output.





# Brand Activation Management - a better way

BAM by Papirfly™ is the all-in-one solution for:

## Employer branding

Recruit, retain and empower the best talent to make you the employer of choice in your sector and create loyalty with a clear and consistent global employer brand.

## Corporate

Establish a central, united, global identity and create a responsive culture that speaks with one visionary voice across all teams and regions.

## Retail branding

Deliver a fluid, uninterrupted and completely consistent omnichannel experience to – online and in person – and maximise your bottom line.

## Distributed marketing

Integrate your campaigns with any channel, speeding up time to market, giving everyone who sells your brand to do so with the nuances needed at a hyper-local level.

## Book a demo and discover the possibilities

A member from our team of experts will guide you through a live demonstration of our platform, helping you to further understand how Brand Activation Management empowers your marketing operations.

Ask any questions, see our solutions in action and get the bigger picture of how BAM by Papirfly™ can increase ROI whilst improving and never compromising brand consistency.

[Book a demo today](#)

# Ready to talk?

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[www.papirfly.com](http://www.papirfly.com)

