Omnicom HealthGroup

# Trends in Pharma Marketing Technology Adoption

September 2020

# Background

With COVID-19 altering life as we know it, the ramifications on marketing communications, particularly in the pharmaceutical world, continue to evolve. From professional engagement to medical education, from clinical trials to patient communications, pharma has had to quickly adapt to the new normal. Due to the shift from face-to-face engagement to primarily digital communications, our reliance on technology has come into sharp relief. Hence, Omnicom Health Group embarked on this study to understand the contours of marketing technology adoption among pharma companies and identify opportunities that exist to strengthen digital capabilities that enable a modern healthcare customer engagement. We conducted a quantitative survey of advertising organizations in pharma marketing who work with more than 50 pharma and mid-size biotech global companies to uncover the current and planned usage of technology in 12 areas that make up the marketing technology stack:

## 12 Areas of the Marketing Technology Stack

- CRM
- CMS
- Data Analytics
- Email
- Data Management Platform
- Data Warehouse
- Call Center
- Consent Management
- Customer Data Platform
- Orchestration & Automation
- Adtech
- Other

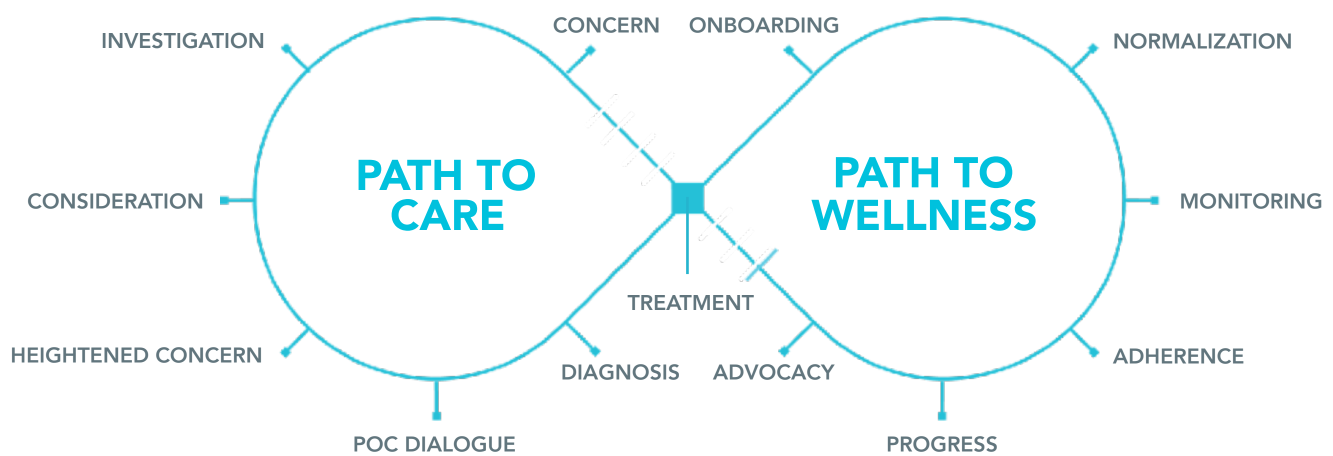
 

# Background

We identified 4 phases of maturity in adoption that illustrate how well-aligned marketing technology along the healthcare customer journey can drive customer engagement. Here are the 4 phases:

1. **CAPTURE CUSTOMER DATA**
2. **PROCESS DATA**
3. **ANALYZE BEHAVIOR**
4. **ACTIVATE PERSONALIZED ENGAGEMENT**

## 4 Phases of Digital Tech Adoption to Align with the Healthcare Customer Journey




**1 CAPTURE CUSTOMER DATA**

AKTANA, salesforce, nielsen, krux, IQVIA, Veeva OpenData, hadoop, TEALIUM, Veeva Engage, Redpoint, ORACLE, Veeva CLM, Quantcast, Adobe Experience Manager

**2 PROCESS DATA**

Vault PromoMats, epi, Adobe Experience Manager, servicenow, salesforce service cloud

**3 ANALYZE BEHAVIOR**

Google Analytics, tableau, Adobe analytics

**4 ACTIVATE PERSONALIZED ENGAGEMENT**

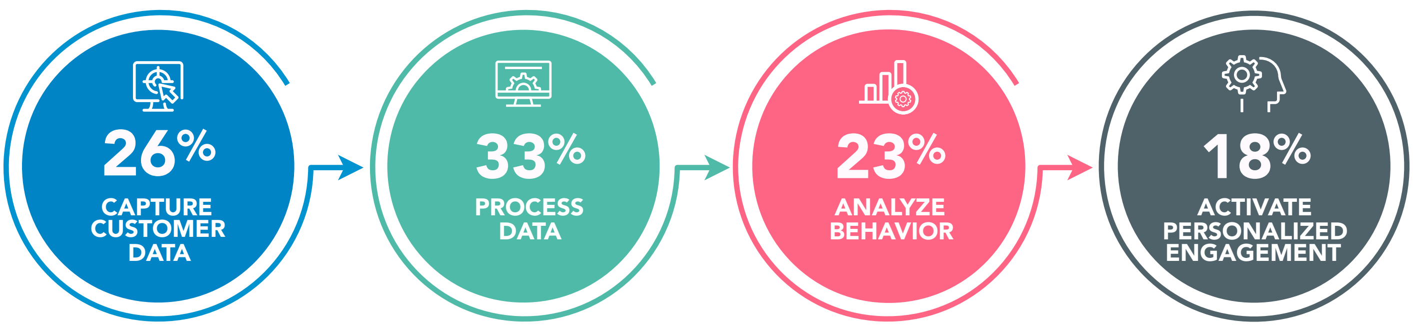
MediaMath, Marketo, salesforce, eloqua, salesforce marketing cloud, salesforce health cloud

# Findings

Usage of digital technology platforms is spearheaded by the larger pharma companies. Implementations among smaller biotech companies appear to be limited. Overall, pharma is invested more in the earlier stages of the digital tech process with greater tech adoption in Customer Relationship Management (CRM) solutions that make up the bulk of Phase 1, and Content Management System (CMS) solutions that dominate Phase 2.

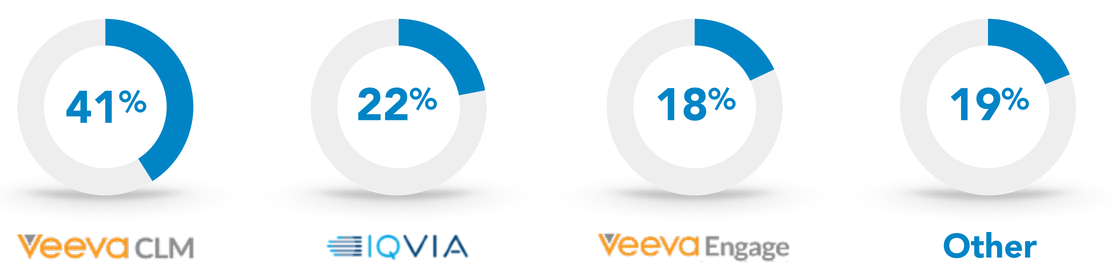
In response to the pandemic quarantine restrictions, there are plans afoot to further activate on platforms such as Veeva. Their products, Engage (solution for real-time, remote HCP engagement) and CLM (solution for Closed Loop Marketing), have specifically been highlighted as top priorities. Other planned implementations span Processing and Activation.

### Pharma Has Invested More in the Earlier Phases




## PHASE 1: CAPTURE CUSTOMER DATA

Veeva CLM captured the majority share in this phase with 41% but companies continue to look for solutions better matched with their needs. Usage of IQVIA at 22% suggests that other CRM solutions have value and appeal in what was previously a Veeva-dominated market.



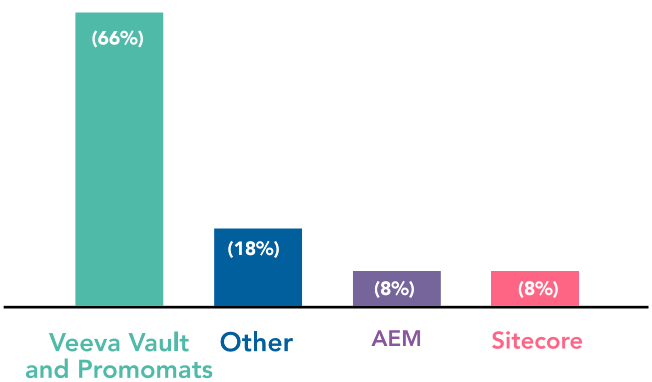

 

# Findings

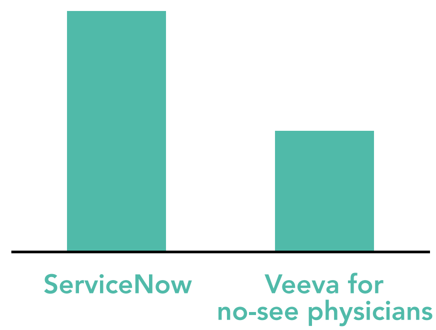
## PHASE 2: PROCESS DATA

CMS solutions are widely used with Veeva being the primary vendor in this category. Despite reportedly low volume, knowledge of Call Center implementations points to greater focus on virtual solutions. Pharma has been adopting technology to close the gap for no-see physicians through Veeva and with the rise of telehealth, virtual solutions are likely to increase.

### PHASE 2 ADOPTION OF CMS




### PHASE 2 ADOPTION OF CALL CENTER




## PHASE 3: ANALYZE BEHAVIOR

Analyzing customer data remains critical and pharma and biotech companies are looking beyond site analytics and into business intelligence applications. Approximately 66% of respondents reported the use of site analytics as a primary method to analyzing behavior. Twenty nine percent are also implementing business intelligence solutions, and a small minority (5%) are cited as using more advanced statistical analytics products such as SAS.

### PHASE 3 ADOPTION TO ANALYZE BEHAVIOR

| SITE ANALYTICS | | BUSINESS INTELLIGENCE/DATA VISUALIZATION | STATISTICAL ANALYSIS |
|---|---|---|---|
| Google Analytics | Adobe Analytics | tableau, SAP BusinessObjects, Power BI, DOMO | sas |
| 56% | 10% | 29% | 5% |

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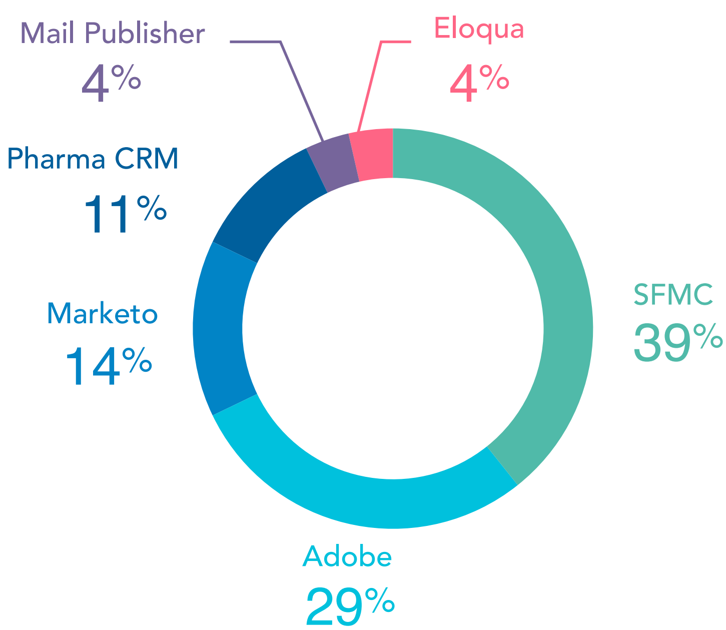
# Findings

## PHASE 4: ACTIVATE PERSONALIZED ENGAGEMENT

Investment in this space is lowest of all the digital phases, yet it poses the greatest competitive differentiator for pharma. Email campaign management helps pharma companies distribute content leveraging their first-party data, of which Salesforce and Adobe are the primary vendors in this space. Building on first-party data and integrating third-party information will further enable Pharma to deliver personalized engagement that is more relevant, more dynamic, and more impactful. As a result, we believe the opportunity to differentiate with personalized engagement is significant and we anticipate a growth in investment in this step of the digital adoption journey.

### PHASE 4 ADOPTION TO ACTIVATE PERSONALIZED ENGAGEMENT




Orchestration & Automation solutions, while not mentioned frequently, suggest an advanced approach to marketing activation as a part of personalized engagement that is not fully realized by pharma. Of those that reported usage in this area, 39% of the companies indicated use of Salesforce Marketing Cloud and 36% of Adobe.

# Key Takeaways

Looking at the technology stacks in use by pharma companies in light of the 4 phases leading to digital maturity, here are the key takeaways:

## ACCELERATING THE ADOPTION CURVE:

Larger companies are utilizing more digital technology solutions while smaller ones have adopted fewer platforms. Across the different technology areas, significant gaps in integration are apparent although COVID-19 is accelerating implementation.

## BROAD SPECTRUM OF TECH USAGE:

Pharma and biotech companies have focused on the first two phases: Capture and Process Data. Technologies in use are tending to be stand-alone solutions rather than as a part of an integrated toolbox. Investment in early-phase adoption is a great start, but there are big wins to be attained in completing the circle. While more technology does not equate to digital maturity, Activating Personalized Engagement could be the biggest differentiator for pharma.

## STRENGTH IN PARTNERSHIPS:

Given the breadth and depth of knowledge involved, it would take more than a single marketing partner to provide expertise across all platforms to move from merely activating in the early phases (Capture and Process Data) to unlocking the true potential of the latter phases (Analyze Behavior and Activate on Personalized Engagement). Omnicom Health Group can bring together just the right mix of expertise from various agency and technology partners to lead and partner with pharma and biotech companies on a digital tech adoption journey that realizes the promise of modern healthcare customer engagement. For more information, please contact us at technology@omnicomhealthgroup.com.