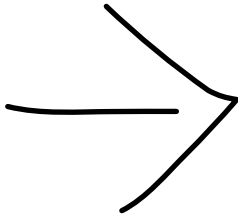
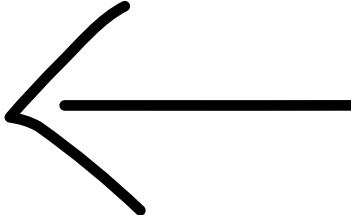


LOOKING BACKWARDS, THINKING FORWARDS



A review of
pharmaceutical
media in 2021
& predictions
for 2022

Looking backwards

- A changing attitude towards healthcare
- Always on-line
- Pharma's coming of age into media
- Changes to AdTech will transform how we advertise

Thinking forwards

Pharmaceutical media in 2022: Key Predictions

- Pharmaceutical brands embrace traditional media
- Media Effectiveness enters the conversation
- Becoming creative with context
- A need to refocus on trust across pharma

It's hard to overstate how much our world has transformed over the course of the past two years. In navigating lockdowns, living our lives inside and online, and a stuttering of global commerce, our economies, cultures, societies, beliefs, and behaviours, all have irreversibly changed.

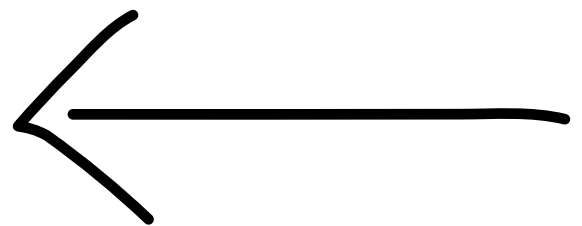
After such immense change, many spent 2021 re-evaluating their lives in this altered landscape. In the workplace we saw 'The Great Resignation' as scores of people left their jobs in search of ones that grant them better work-life satisfaction. In our towns and cities there is a reversal of rural – urban migration as our lives have grown more interconnected online, decreasing the need for physical proximity to work, friends and relatives. What we are seeing is a reassessment of our priorities in life and how we want to live.

As such, the theme of this report is reflections, outlining how broader societal changes in 2021 have impacted the pharmaceutical media landscape and the key trends that we're following in 2022. This report will reflect on the changing attitudes towards healthcare, the implications of our fragmented media diets, pharmaceutical brands' uptake of digital media, and the changes to data collection and measurement that will impact how pharma fundamentally engages with audiences in the coming years. We will close out on our predictions for pharmaceutical media in 2022.

We hope you'll find it insightful.

Karen Stephenson
Client Services Director
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LOOKING
BACKWARDS
FORWARDS



A changing attitude towards healthcare

The collective trauma of COVID-19 has reemphasised to us the importance of our physical and mental health and the providers of healthcare to our global wellbeing. With every medium of information now laced with references to the importance of limiting social contact, staying indoors, and disinfecting your hands, health and hygiene has moved from the periphery to the centre of our lives.

Consequently, we have become more aware of our health and wellbeing and have adapted methods to cope. For example, globally, 42% of people have adopted wellness-focused activities into their health regime over the past year¹. These range from simply breaking the day up with walks, practising their hobbies more or trying yoga and meditation. These adaptations reveal a demand for more control and autonomy over our own health, and a shift in attitude regarding healthcare; from a reactionary approach to one that is preventative and proactive.



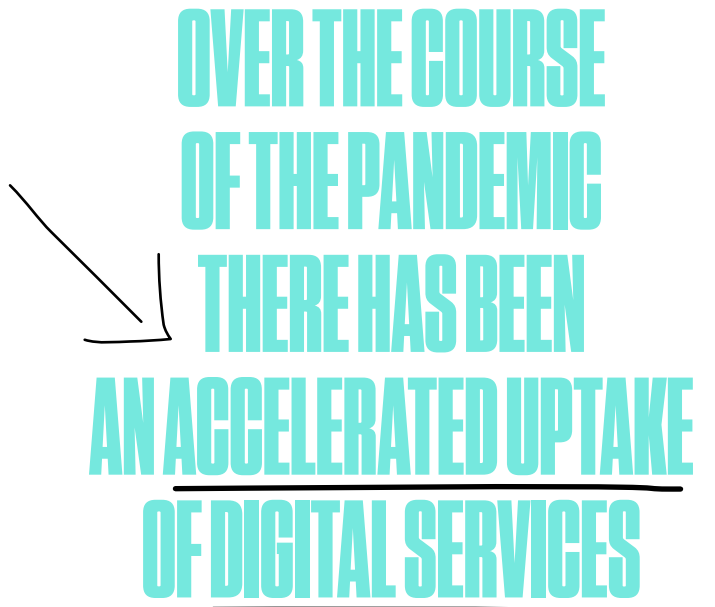
**GLOBALLY, 42% OF
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This heightened awareness and demand for control has implications on the providers and provision of healthcare, shifting the onus of care more towards the individual. 2021 saw smartwatch ownership increase across all age groups², enabling wearers to have a continuous insight into their cardiovascular health, and millions of us found assurance in self-testing for COVID-19 through diagnostic kits sent to our homes. This growing attitude was compounded by inflated treatment backlogs that left many without treatment and looking to ways they can care for themselves outside of traditional healthcare providers.

For necessity and convenience, patients turned to a new breed of online start-ups for telehealth and online pharmacies, like *Zava*, *Babylon* and *PushDoctor*, for a more expedient healthcare experience to fulfil their prescription requests and address their healthcare needs. Outside of healthcare, there has been an accelerated uptake of digital services over the course of the pandemic. For patients used to the convenience of fast online delivery services like Amazon and Deliveroo, using digital healthcare platforms is a natural extension of their digital lives. The benefits were threefold; patients could save time and money; it is more accessible for those with limited mobility and living in rural areas; and its discretion benefits mental health patients, who make up 60% of all telehealth visits³.

Whilst usage over the pandemic has been strong and sustained, there is global hesitancy as to the role of telehealth post-pandemic with 37% likely to continue using it, 33% unlikely and 30% undecided⁴. We are also seeing a push-back from groups of patients and specialists alike who believe without the intimacy of in-person care there will be more misdiagnoses and an inferior patient-doctor relationship⁴. However, telehealth is unlikely to go away; the future is likely to be a hybrid of in-person visits and digital consultations varying by disease area offering individuals greater control over how they receive healthcare.

Additionally, this change in attitude has impacted our expectations of the level of care a doctor should provide, not just treating their illnesses, but proactively addressing our mental health too⁶. Currently, 55% of people believe doctors are better at prescribing treatments than they are at listening to their patient's concerns and adapting their treatment decision to address their issues⁶. In the future, 62% expect their doctor to behave more like a health coach that pays attention to their physical and mental health, rather than just focusing on disease and illness⁷.



OVER THE COURSE OF THE PANDEMIC THERE HAS BEEN AN ACCELERATED UPTAKE OF DIGITAL SERVICES

During 2020 the global spotlight turned on the pharmaceutical industry as the world watched the race to develop a vaccine for COVID-19 in real time. The public had a new appreciation for how central the whole industry is to health. Suddenly, people turned to social media, the news, Google and YouTube to learn about the pharmaceutical industry, and this trend continued into 2021 with online mentions of pharma up 92% YoY, Google search interest up 19% and YouTube search interest up 118% from 2019⁵. Whilst attention is high, engagement with social media posts that mention pharma are down 75% YoY and Edelman's trust score for pharma has declined to pre-pandemic levels⁶. Despite greater attention and understanding of the pharmaceutical industry, trust issues still linger, holding pharma back from playing a more significant role in society and building more meaningful relationships with the public.

With audiences wanting greater autonomy over their health, using telehealth to see their doctor, and having a greater respect but lack of trust for pharma, the expectations and relationships to the industry have changed. To capitalise on the newfound attention and expectations, pharma marketers need to consider how they can earn the trust of the public and reposition their brands to adapt to the new healthcare landscape.

Always on-line

Many wished for/predicted a return to 'normal' in 2021, in which our work lives and leisure would become less digital. However, following global recurring lockdowns, this wasn't the case.

Whilst mobility has returned to pre-2020 levels in most markets⁷, we still live most of our days online. Smartphone ownership has increased, fuelling an increased time spent on social media and messaging platforms. Smart TV ownership and VOD (video on demand e.g. Netflix, iPlayer, Peacock) also increased, fuelling a rise of online video consumption. A younger generation embraced new social platforms such as TikTok and bought new games consoles consuming their free time with short video content and gaming. With all these developments happening behind a screen, online music streaming has increased as entertainment during work but also a release from screen time, allowing marketers additional opportunities to reach audiences in their downtime⁸.

What marketers must remember here is that online adoption and consumption levels vary by demographic, interests, life stage and wealth, meaning companies must work closely with their agencies to closely understand how these media changes have affected their segments. The pandemic accelerated media fragmentation faster than we have seen before, scattering audience attention across multiple touchpoints throughout the day, decreasing the value of each impression made. Brands need to ensure they are still investing in the places that their audiences are giving their attention to.

**WE CAN NO LONGER
HOLD THE SAME
STEREOTYPES ABOUT
MEDIA USAGE THAT
WE HELD PRE-PANDEMIC**



One thing that is clear is that we can no longer hold the same stereotypes about media usage that we held pre-pandemic. This is evidenced most by IPSOS IRIS, the official UK digital audience measurement platform, who in June 2021 added a 75+ year old demographic to their surveys after online usage increased 43% in this age group to over one million people⁹. Largely this audience went online to shop, keep in contact with their family and catch up on VOD content. Commerce, communication, and entertainment – the reasons why this audience go online is no different to younger demographics, *how* they use the internet is where they differ.

Following the changes that were brought to their workload and life during 2020, healthcare professionals increased their adoption of online platforms for news, networking, education, and entertainment. This pattern continued into 2021 due to necessity but also the flexibility of online resources and services.

For instance, more physicians signed up to physician social media sites to maintain contact with their peers, largely appreciating them for their convenience in increasingly busy days and access to a global network of knowledge. Yet physicians agree that they don't replace in-person conversations that are spontaneous and where emotional relationships can more easily form¹⁰.

However, this flexibility has meant physicians are increasingly conducting these online activities in the evenings and weekends, thus extending, and reshaping their working day. Similarly, HCPs are signing up for online congresses and med-ed content but saving it for out of work hours to keep up. These shifts in information consumption behaviours are reflective of a growing frustration with trying to balance their larger workloads and keeping up with industry developments to give their patients the best care¹⁴.

It is crucial for pharma marketers to take these reactions into account. What channels do we use, how we use them and why we do so constantly shift? With increased media touchpoints comes a greater need to understand how your audience uses each one, and a responsibility to acknowledge and empathise with the currently careworn contexts physicians and patients are in. The flipside to the convenient, always-on culture is burnout, a reality many of us know all too well after spending most of two years inside and online. The brands that will win the race for attention are not the ones who shout the loudest anymore, but the ones that engage with their audience on a deeper emotive level.

It is easy to get caught up in the new media trends, but the fundamentals to building a brand are the same as ever – understand your audience better than your competitors, provide solutions to their needs and issues, and communicate with compassion and empathy.

Pharma's coming-of-age into media

Almost two years ago, hospitals closed their doors to pharmaceutical sales reps forcing pharmaceutical marketing teams to rethink their promotional approach. What followed was an accelerated education in the wider digital media landscape to adapt to the changes in physician and patient media consumption and to reach their audiences in new ways.

With the volume of F2F promotions still below pre-pandemic levels¹¹ and an increased time spent online, this adoption of media spend into marketing budgets is here to stay for 2022.

Prior to the pandemic, the role of media was considered complementary to sales rep activity, a method to reinforce messages and nudge behaviours, but not a driver of sales in and of itself. With the disruption to the traditional pharmaceutical sales model, pharma marketers were forced to fully integrate media into their teams, hire 'omnichannel managers', enhance their knowledge of the broader media landscape and explore alternative approaches to selling pharmaceuticals to stay ahead of the competition.

Whilst pharma's coming-of-age was accelerated by the pandemic, it has been a long time coming. Industries outside of pharma, whether B2B or B2C, have an established use of multiple media channels in their marketing. The word 'omnichannel' is something that was on trend ten years ago and is so commonplace now it's the understood way of communicating to an audience whose attention is fragmented across multiple mediums at different parts of the day.



Pharma's audiences are no different, doctors and patients are people too whose media diet has changed dramatically over the past two years, altering how, where and when pharma can build relationships with their audiences. Recently pharma has explored this through experimenting with their media mix but also with their sales model, launching products rep-less, solely relying on media to build brand awareness, distinction, distribute content and drive sales.

This sea of change in sales models catalysed a renewed need for marketers to better understand their audiences. With changes in daily routines and media behaviours, established customer journeys have expanded and contracted, becoming hybrid online and physical journeys, eliminating some pain points but adding others. For instance, the adoption of telehealth to see your GP has shortened the healthcare journey, making what was a long, offline process into a short online procedure. The acceleration of care and reduction in friction points alters patients' expectations from doctors and puts pressure on brands in certain categories to provide the right information in these shorter timeframes.

Additionally, without continuous direct face-to-face contact with their audience through sales reps, pharma has begun to assess what they know about their audiences and how to build in a continuous feedback loop. This has brought about a need to not just upskill their knowledge of media platforms and data collection methods but working internally to audit their current data architecture and adapt to more agile approaches to build up their 1st party data. Consequently, pharma brands have been building data collection points into their customer journeys to ensure they are continually learning about their audience and are able to optimise their approach to become more effective over time.

PHARMA CAMPAIGNS HAVE TYPICALLY FOLLOWED A SET PATTERN OF CHANNELS AND STRATEGIES THAT GO AGAINST THE BASIC PRINCIPLES OF MARKETING EFFECTIVENESS¹²

However, a study by Accenture found pharma campaigns have typically followed a set pattern of channels and strategies that go against the basic principles of marketing effectiveness¹². Pharma communications rely heavily on owned channels and micro-targeting via search and social, prioritise differentiation over distinctiveness, and emphasise rational rather than emotional strategies – all of which contradict the general principles of effectiveness in both B2C and B2B marketing.

The pandemic revealed to pharma the possibilities of using media to drive their business objectives and the need to adapting a flexible multichannel approach to adjust to the new hybrid reality of healthcare. But in an increasingly competitive media landscape, marketers will have to re-evaluate their media strategies to understand how they can continually draw attention and become more effective in their communications over time.

Changes to AdTech will transform how we advertise

Pharma's coming-of-age into the digital world has come at a time when the advertising industry's approach to data is in flux.

Following increased privacy regulation and scrutiny from the public and politicians, the 'death' of third-party cookies by Google (now scheduled for 2023) and the decision by Apple to require users to opt-in to ad tracking by mobile apps, brands will find it harder to measure, access and analyse user-level data. More recently, Meta announced it was limiting the ability of advertisers to target based on a user's healthcare interests, severely impacting pharma's ability to reach patients and healthcare professionals on Meta's platforms¹³. In the short term, this will alter the measurement, targeting and attribution of online actions as the industry decides on the long-term solution.

These restrictions have forced the industry to reflect and innovate on how to market to their audiences online that is mutually beneficial and respectful of their desire of privacy. For instance, initiatives like Google's Federated Learning of Cohorts (FLoC) encourages the analysis and targeting of audience groups, rather than individuals. Additionally, if brands understand their audience's media consumption patterns, demographics, and interests more, they can begin to engage with their audiences contextually online and offline in meaningful environments.

For pharma marketers, one solution to the impending third-party data crisis will be to invest in first-party data collection. Traditionally, sales representatives have been one of the biggest contributors of first-party data for a pharma brand. Without having a direct customer relationship with patients and some HCPs in 2020-21, pharma brands have started to gather first-party data via other means, including congresses, content, and webinars. With this data, brands can build up a comprehensive picture of their audience and segment and personalise their content to meet each audience's needs.

IF BRANDS UNDERSTAND THEIR AUDIENCE'S MEDIA CONSUMPTION PATTERNS, DEMOGRAPHICS, AND INTERESTS MORE, THEY CAN BEGIN TO ENGAGE WITH THEIR AUDIENCES CONTEXTUALLY ONLINE AND OFFLINE IN MEANINGFUL ENVIRONMENTS.

On the other hand, the innovation in digital targeting and measurement has opened up platforms like DOOH (digital out of home) and CTV (connected TV) to pharma advertisers who need a sufficient level of targeting for a channel to be viable. Combined with the reduced cost of entry and ability to personalise messages to specific audiences, pharma brands can now position themselves alongside the programmes their audiences adore and in the locations they frequent.

With discussions across the digital industry continuing into 2022, pharma brands should work closely with their media agencies to navigate their way through the intricacies of digital marketing and to align on the right approach to media targeting and measurement.

Whilst the impact has significant ramifications on online measurement and targeting, we don't anticipate this to have a large effect on digital media spend in the pharma industry, more in industries where your ability to optimise your online media and content directly impacts sales.

BACKWARDS → THINKING FORWARDS

Pharmaceutical media in 2022: Key Predictions



Looking forward, we see pharma beginning to become more comfortable with media and using 2022 and beyond to experiment. Experimentation will come in formats, in measurement and in targeting, but a close attention will be paid to ensuring they are making an impression on their audience's lives.

In this section we cover how we see these trends playing out in 2022 and what actionable steps brands can take to embrace these predictions.

Pharmaceutical brands embrace traditional media

Within healthcare, to gain a valuable connection with a person there is a huge element of trust and empathy that needs to be established.

Traditional media taps into people's daily lives, reaching them during different mindsets and environments. Integrating your communications and being relevant within these daily moments can help to spark engagement.

Audio and visual media such as TV, VOD, radio, and digital audio, allows you to use tone of voice and video to establish a brand personality and be relatable to the audience. You can also use visual and/or audio storytelling to evoke personal emotions and boost the retention of your message.

Over the past year advances in targeting and tracking mean that TV, VOD and various types of audio can efficiently be planned to reach specific audiences. This includes targeting audiences directly based on segments such as demographics, interests, or household composition. Now traditional media can be planned, bought, and measured in the same way as online media.

Traditional media in the upper marketing funnel increases the chances of engagement with online media/resources as there is already an established relationship. This in turn drives traffic to online sources such as websites or social pages where you want people to complete an action. As pharma become comfortable with using online media to build their brand and drive engagement, we expect local unbranded media plans to begin to factor in traditional media to extend and deepen their impact amongst their target audiences.

What brands can do

Work with your media agency to understand what benefit traditional media channels would add to your media plans.

Start small. Adopt one more digital channel such as digital audio and trial in particular areas.

Once sure, commit - enough to make your impact significant and noticeable. Traditional media can make a meaningful impact to your media effectiveness. Be bold.

Adopt a long-term test and learn approach to leveraging traditional media in local media plans. Don't expect results to come instantly, assess what brand, business, and digital metrics you want to track to assess the channel's impact.



Media Effectiveness enters the conversation

As brands embrace rep-less and rep-light commercial models, the onus on media to prove its effectiveness has arrived and brands will be looking at how agencies not only drive engagement online but impact business, brand, and marketing objectives.

In line with the 'digital transformation' the industry is undergoing, marketers will begin to upskill in how to create, run and measure an effective media campaign and will expect agencies to be able to develop integrated campaigns that solve business challenges and demonstrate results.

Traditionally the inability to measure the causal relationship between media and sales in the pharmaceutical industry (outside of the US) has held back a widespread adoption of media. When reps offer brands an ability to build a personal direct relationship with doctors, and see the correlative effects on sales, marketing budgets have always swayed in the direction of them.

Yet the key to measuring the effectiveness of media is the same as measuring the effects of sales reps – data. With 40% of European and North American pharma employees believing that COVID-19 accelerated 'digital transformation' by more than five years¹⁴, marketers are gaining access to more data that can drive media decisions and measurement. Through understanding these vast streams of 1st, 2nd, and 3rd party data and aligning it with business intelligence data, marketers can build measurement models that can track the impact of media on the brand and business.

However, with the changes to online measurement coming into play in 2023, marketers will have to work closely with their media agencies to ensure the models and media plans they have built or are building are still relevant in the long term.

MARKETERS WILL BEGIN TO UPSKILL... AND WILL EXPECT AGENCIES TO BE ABLE TO DEVELOP INTEGRATED CAMPAIGNS THAT SOLVE BUSINESS CHALLENGES AND DEMONSTRATE RESULTS

What brands can do

Audit media campaigns and internal data collection at a global and local level to assess how the effectiveness of media is currently being measured and whether there is a more accurate method.

Create a consistent measurement framework for local markets to follow to ensure internal alignment and set marketing expectations.

Becoming creative with context

From channel first to need-state first, customer centricity will move to the heart of every campaign and need states will be factored into segmentations as pharma companies begin to adapt their media strategies to the changing audience expectations and digital landscape.

With both patients and physicians using various digital channels in their everyday life and work, and the changes to online targeting brought about by Apple's iOS updates and Google's imminent cull of 3rd party cookies, a brand's understanding of its audience will be crucial to building effective campaigns.

We all visit certain online and offline resources and channels with certain needs we expect these platforms to satisfy. Whether it's being entertained through TikTok or informed through the BMJ, why we use each platform is just as important as to what we use. For once we understand our audience's media habits and behaviours, we can begin to tailor our media plans, creative and messages to each context with empathy and creativity to address the needs of our audiences.

For contextual advertising to be effective, there should be an equal focus on the medium and the message. Nielsen estimates 47% of advertising effectiveness to be attributed to a brand's creativity¹⁵ and Google agrees, stating creative is the 'last unfair advantage in business'¹⁶. Therefore, creativity in how you tell your story and engage with your audience is just as important as where you reach them. All of which stems from researching and understanding your audience as people with needs and problems who use media to address such needs.

What brands can do

Step back – assess what contexts your advertising is being placed in and the messages you are using.

Learn more about where your audiences spend their time online and offline and the key places you can reach them.

Take time to understand the technology of publishers and providers to make sure you understand the methodology and the best ways to utilise their approach.

When building a media plan, look at the story you are trying to convey through your creative and messages and work with your media agency to tailor your content to the platforms you are using.



A need to refocus on trust across pharma

We have a natural disposition to trust. After all, trust pervades society. No meaningful relationship exists without trust. Like blood pressure, it's silent, vital to good health, but if neglected can be deadly.

While the pandemic has brought us resilience, kindness, and courage, it vastly diluted our trust. Fuelled by misinformation, political scandals, and anti-vax angst, we've lost trust in our economies, leaders and in some countries, our healthcare institutions that while working tirelessly, are buckling under the pressure.

In such times of uncertainty, we need to trust that the institutions delivering our healthcare, whether hospitals or pharmaceutical businesses, have our best interests at heart and are working towards the greater good of society. At no other time has trust been so pivotal to our personal decisions around who we rely on to deliver our healthcare. For decades, pharma has faced multiple reputational challenges and continually plays with the dichotomy of developing life-changing medicines but being a for-profit industry, hindering the perception of its role in society. For pharma to play a more central role in healthcare it has to refocus on regaining society's trust.

The IPSOS' Global Trustworthy Index reports we trust doctors more than we do our politicians and government-led health agencies^{17,18}. We trust doctors more than our armed forces, police, judges, and teachers – It seems the 'trust me I'm a doctor' ethos, really does still ring true.

Additionally, doctors are also the leading, trusted sources of information for healthcare needs, despite healthcare information being available at our fingertips, on-demand 24/7 via 'Dr. Google'. This shows that we still yearn for, now more than ever, reputable, and authoritative sources regarding our health.

To be trusted also makes good business sense. Trusted brands enjoy more loyalty, equity, engagement, and exclusivity to name a few⁶. High levels of brand trust also give companies the ability to build longer-lasting, more meaningful relationships^{19,20,21}. This makes sense. Both the cancer patient undergoing extensive chemotherapy and the Oncologist that's treating them, want to know that the pharma company they interact with is truly empathetic towards their needs.

While COVID-19 has brought us many things we'd much rather forget, it's also put a spotlight and focus on appreciation for good health and healthcare. It's shown us what we do and don't want in the unknown roads ahead.

It truly is a unique time for pharma – a time to embrace and show purpose for the overall benefit to society. And whatever our post-COVID-19 world looks like, pharma is in a position that can provide the stability we're all so desiring.

What brands can do

Garner trust through **frequent and timely provision of information**. Seek new opportunities, such as through partnerships with patient groups, HCP groups and professional associations and relevant organisations that can help build this.

Focus on putting patients first and at the heart of everything you do. Look for areas that may need more work to increase brand trust. An example could be devoting more effort to support communications that explain complex trials better or revamping the user experience of a patient app. Ensuring open and continuous dialogue is key.

Display confidence, competency in knowledge and integrity through authoritative media channel choices. With media choices affecting perceptions of a brands trust²², it's imperative that energy is focused within these quality environments that will create a further halo effect in adding credibility to the message.

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Do you have a media strategy that is innovative and making a meaningful difference to your brand and business?

Havas Lynx Group is an integrated pharmaceutical and healthcare creative advertising agency.

AMP is the media advertising agency within Havas Lynx Group. We help clients build and execute media strategies and plans that make a measurable long-term impact on their businesses.

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