



Reference

Pharma and healthcare marketing trends 2021

Smart Insights' analysis of 9 key future market trends
with examples from early adopters

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Part of the Pharma / Healthcare Toolkit

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INTRODUCTION

We are now in a period of significant change where the pandemic has increased the importance of digital communications and value delivery. Within the pharma and healthcare sector, businesses need to continue to innovate their business models to make their online experiences and customer engagement communications more effective.

This report aims to highlight trends in marketing communications within Pharma and healthcare sectors with an emphasis on digital marketing. These trends are, in turn, influenced by broader trends within business and revenue models within Pharma.

The authors of the [KPMG Report - Pharma outlook 2030: From evolution to revolution](#) - highlight the broad trends within the sector:

“The pharmaceutical sector is at a crossroads. In a heavily disrupted marketplace, characterized by shifting payer attitudes and patient empowerment, neither incremental adjustments nor steady evolution are likely to halt the decline of the traditional pharmaceutical business model.”

This disruption is a result of a shifting power balance in two primary directions.

The first shift is in the balance of power across the healthcare value chain, as governments and insurers take center stage, pressuring pharmaceutical companies to reduce prices and demonstrate greater value from their therapies.

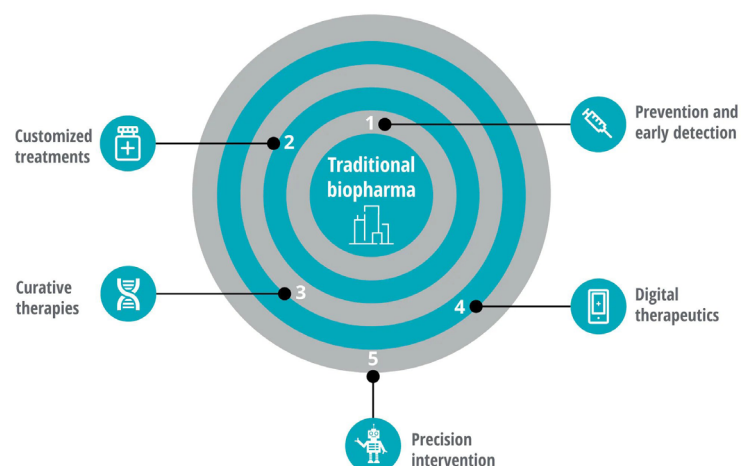
Secondly, the swing from treatment to prevention, diagnostics and cure, will grow stronger in time, attracting a host of new entrants from within and outside of the sector.

This disruption is further backed up with [findings by Deloitte](#) who suggest that there will be five sources of potential disruption to the biopharma industry specifically.

- ✓ **Prevention and early detection:**
Treatment for some diseases could be rendered no longer necessary with continued improvements in wellness and vaccine technology. Interventions that halt diseases in their earliest stages will be possible with continued advances in early detection methods - thereby preventing their progression to becoming more serious conditions.
- ✓ **Customized treatments:** 'Big data' powered personalization could help match patients with tailored therapies or custom drug combinations - avoiding a 'one-size-fits-all' approach to treatment.

FIGURE 1

Five forces of potential disruption to the biopharma industry



- ✓ **Curative therapies:** Similar to preventative approaches, curative therapies could reduce or even eliminate the usage of some prescription medicines. To achieve this, the biopharma sector will likely need to invest in and adopt new capabilities to develop, market and assign appropriate pricing structures.
- ✓ **Digital therapeutics:** Medication demand could be reduced or eliminated through the appearance of increasingly effective and scalable nonpharmaceutical (digital) interventions such as those focused on behaviour modification.
- ✓ **Precision intervention:** Robotics, tissue engineering, or nanotechnology could reduce the need for pharmaceutical intervention.

How can digital communications trends support this innovation?

Using integrated digital communications will be important across all of these innovations in service delivery. In our trends report, we focus on how innovations in digital communications can support brand marketing and sales teams communicate these new value propositions.

We envisage that investments in digital media and technology will increase in marketing communications both to healthcare professionals (HCPs) and consumers where the direct to customer (D2C) model is becoming more important.

Direct-to-customer (D2C) model

The Direct-to-customer (D2C) model is enabled by digital disruption. It involves brands communicating their proposition and, in some cases delivering their services, direct to customers via digital media channels such as website content with content distribution achieved through search engines, digital ads, social media and email automation.

A D2C example from the Pharma sector is where Abbott introduced Freestyle Libre, a consumer subscription commerce option to improve access and loyalty for its diabetes care devices. This service uses many of the approaches of Software-as-a-Service or (SaaS) platforms to test and improve customer conversion rates and loyalty.

FreeStyle Libre

Abbott
life. to the fullest.*

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JOIN THE MYFREESTYLE PROGRAM

< Try Continuous Glucose Monitoring for FREE*

The MyFreeStyle program will show you how to use a continuous glucose monitor (CGM) to reveal personal insights about your body through 14 days of guided support.

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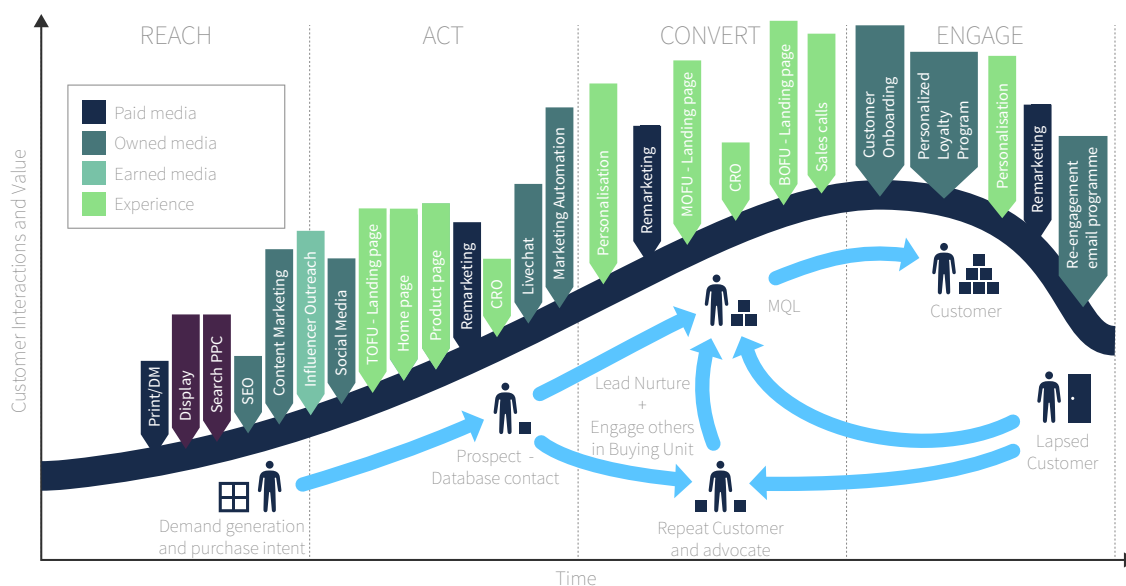
When launching such new D2C services digital media and technology will become more important within campaign communications to reach and persuade consumers as they decide on adoption independently or with HCP support.

Reviewing the quality of orchestrating **always-on marketing communications** across paid, owned and earned media will also become more important to ensure the right types of digital and traditional communications are used across the entire customer lifecycle model. This example summarises B2B lifecycle AO communications across the Smart Insights RACE planning framework suggests the complexity of communications that need to be planned, managed and optimized.

Always-on marketing communications

This is a planned approach to scheduling and optimising continuous marketing activities which support customer acquisition and retention. These activities aim to maximise visibility and persuasion through the customer lifecycle. Key 'always-on' activities include paid and natural search marketing to increase visibility as visitors search for products, information or entertainment; social media and influence marketing to encourage recommendations.

Once visitors are aware of a brand, their interest can be nurtured by marketing automation techniques to feature persuasive content marketing including email marketing, SMS messaging or push notification plus on-site personalisation and off-site re-targeting ads.



Your business model and marketing approach

The approach to marketing that your business takes can be considered in terms of the type of products and services you provide. The KPMG report identified three types of approaches.

- ✓ **The active portfolio company** - This is typically a company that is active in several therapeutic areas within its portfolio. An example would be companies that operate in genetics or immunotherapy - as they are constantly searching for new therapies as well as reappraising their current product mix to help match unfulfilled needs. As the number of blockbuster drugs protected by patents is continually decreasing, an active product lifecycle management approach becomes all the more critical.

- ✓ **The virtual value chain orchestrator** - This approach possesses significant opportunity, effectively able to guide patients through a complex healthcare value chain, supporting healthcare practitioners to provide tailored care, even enabling pharma companies to be paid based on outcomes - all over the patient's lifespan. This presents significant sector change, whereby a company could effectively 'own' a customer but creating one-stop healthcare platforms. This essentially turns health into another consumer choice - where a platform owner covers the entirety of the patient's needs, such as advice, monitoring and treatment of varying and tailored levels of complexity.
- ✓ **The niche specialist** - This means those that typically specialize in treating a condition in its entirety, not those that offer a single type of treatment. A good example would be an arthritis specialist - they can treat symptoms and also provide a host of outcomes that aim to improve the arthritis sufferer's lifestyle, such as offering support splints and comfortable shoes to lessen the impact on painful joints.

Pharmaceutical Marketing or healthcare marketing, what difference does it make?

Pharmaceutical marketing is the marketing of drugs or products to medical practitioners and consumers alike. Traditionally, Rx and OTx marketing has taken various forms - free samples and sales reps, fliers and literature, events, continuous medical education, etc.

Healthcare marketing refers to the marketing strategies healthcare providers, insurers, suppliers and advocacy groups use to attract new patients and increase awareness of their healthcare business.

The consumer healthcare segment is expected to grow and traditional approaches to marketing and branding are being slowly overhauled to try to meet the potential of the market of prevention and health maximization.

Impact of COVID-19

The pandemic has forced many pharma operations, in particular, event-based marketing to move more communications online. It has also provided a significant increase in options for digital communications with customers - both HCP and patients who are looking for content directly from pharma companies. For sales representatives, geographical constraints and travel have been all but negated and they are able to service the needs of a global audience.

Multi-channel selling has been a higher priority in sales teams as well as multi-channel channel content management and the use of well-segmented email sequences has allowed personalised, compelling dialogue with customers. The focus on personalisation and the recognition of what key information customers need has stimulated pharma marketers to improve the quality of their output across all channels.

Many providers are now looking to engage with customers in collaborative and consultative ways that provide value beyond the pill.

In terms of digital transformation, the transition from face-to-face relationships to virtual platforms has mostly been achieved using systems that were already in place. While this has been successful for established relationships, creating and nurturing new relationships will present challenges and proving that your organization is more than just a commercial interest will need a solid strategy if it is to be successful using remote interactions.

Who is this guide for?

This guide is aimed at these roles working in the finance sector:

- ✓ Marketing directors and CMOs
- ✓ Digital marketer managers and e-commerce managers
- ✓ Paid search and performance managers
- ✓ Social media product managers
- ✓ Product managers

As you will have seen, some of these predictions have become reality but there is still a way to go in fully meeting the needs of consumers particularly when rebuilding and maintaining trust through a greater focus on high-quality, accessible information that matches the consumers need.

How will this guide help me?

This guide focuses on reviewing trends in communications within the pharma and healthcare sector using research and examples from the sector to illustrate the trends. Our focus is on trends in marketing and sales communications enabled by digital communications rather than the broader trends in healthcare delivery covered in this introduction.

Let's now get into the specific marketing communications trends that need to be reviewed to inform your strategy.

We will group these marketing communications trends using the Smart Insights RACE Framework to structure the latest marketing trends for the financial sector.

Plan

- ✓ Trend 1: Omnichannel marketing
- ✓ Trend 2: Digital transformation

Reach

- ✓ Trend 3: Content marketing trends
- ✓ Trend 4: Telehealth, eDetailing and ePrescribing

Act

- ✓ Trend 5: Experience optimization and conversational messaging
- ✓ Trend 6: Customer engagement platforms

Convert

- ✓ Trend 7: Wearable devices
- ✓ Trend 8: 'On-demand' healthcare

Engage

- ✓ Trend 9: Consumerization of healthcareEmail marketing and automation
- ✓ Trend 10: Customer engagement and advocacy

Conclusion

Take the next step toward a winning marketing strategy

Join more than 500,000 marketers trained in 170 countries



Team Development

Track learning and give your team the freedom to learn anytime and anywhere, by combining training with application.

UPSKILL MY TEAM



Book A Demo

Get in touch with one of our experienced sales representatives to take a guided tour of the Smart Insights platform.

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Business Growth

Grow your business by learning and applying up-to-date best practice and the latest marketing techniques.

GROW MY BUSINESS



Continue Your Journey

Find out how you can use the RACE Growth Process to help you quantify and achieve digital marketing success.

FIND OUT MORE

Alternatively, read on to discover the nine pharma marketing trends you need to be aware of in 2021 and beyond.

OMNICHANNEL PHARMA AND HEALTHCARE

Many industries launched large-scale omnichannel transformations years ago, and consumers are experiencing the benefits. Digitization has been gradually occurring for many years with the percentage of customers who are willing to purchase digitally gradually increasing. This naturally varies depending on the complexity of the product and the maturity of the market. Banking, for example, has seen widespread adoption of digital service channels.

Pharmaceutical and healthcare companies have been lagging behind other industries in providing an omnichannel experience since face-to-face communications are beneficial as part of service delivery. Although most businesses have begun to increase online services, many consumers still use traditional channels when interacting with them, for a variety of reasons.

Often, the information consumers want is not available online. In many cases, changing channels cannot be done easily because the different channels are not connected. A consumer who leaves an online site and contacts an offline channel (e.g., a call center) must often start all over again, a process that leads to frustration and confusion.

What is omnichannel marketing?

At Smart Insights, we define omnichannel marketing to include both managing customer experience and marketing communications:

“Planning and optimizing always-on and campaign-focused marketing communications tools across different customer lifecycle touchpoints to maximise leads and sales - all the while delivering a seamless customer experience to encourage customer loyalty”.

The number of online and offline channels that need to be orchestrated is shown by the RACE customer lifecycle visual featured in the introduction.

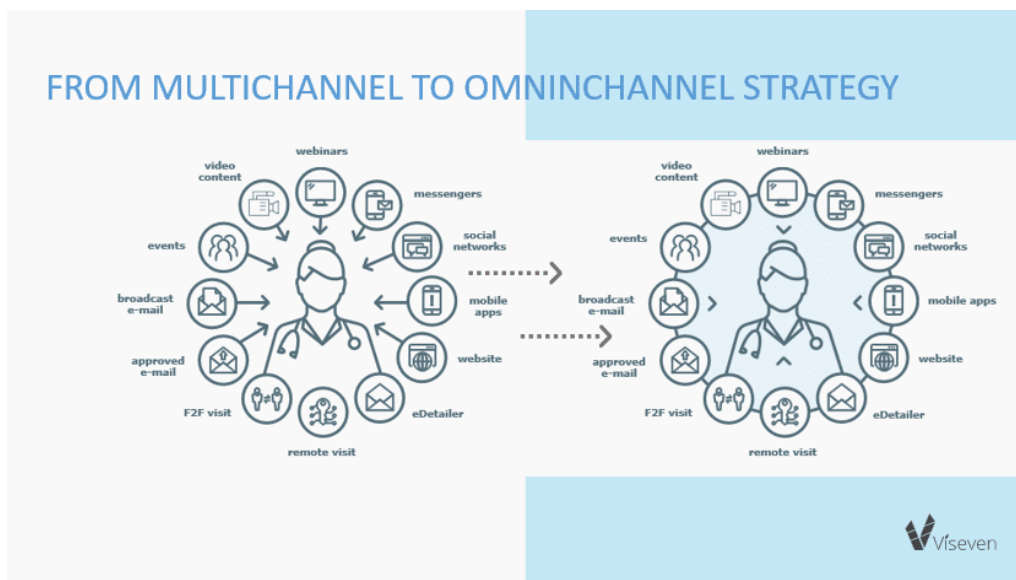
The challenge of omnichannel

“Omnichannel marketing is about providing appropriate and relevant content across different channels that ties together to create a unified message, without becoming repetitive.

Many companies try but fail to build an omnichannel experience for every channel and customer. Leaders should instead limit their focus to the top two or three cross-channel customer interactions.”

- McKinsey July 2020

Viseven describes the movement from multichannel to omnichannel within healthcare as a process that results in the connection of all channels through the customer journey as shown in this diagram.



The benefits of omnichannel marketing

One of the key drivers for the shift to omnichannel marketing activities is the recognition of the benefits to be had from adopting a patient-centred approach. This has been met with scepticism in its ability to drive actual business growth. To understand this better, [The Aurora Project](#), a global benchmark survey comprising 2,346 pharma industry respondents from 84 countries identified five key activities to take patient-focus and profitability to the next level

- 1. Engage patients:** While some respondents believe pharma is doing enough to engage patients, others feel more needs to be done. Specifically, patients bring unique insights based on their experience with a drug and its current therapeutic environment. They can highlight areas of unmet need that clinicians may have underestimated.
- 2. Budget/resources:** An appropriate budget to act on patient-focused ideas is vital with a focus on early investment in patient engagement and interaction. In the long run, spending money on those things that help patients in the short and long-term DOES lead to better business results as prevention measures or vaccinations do in real health care.
- 3. Measurement:** It was felt that the power of big data can be harnessed to assess whether patient adherence and treatment persistence have improved in order to develop more direct relationships with patients and is an area with room for significant improvement.
- 4. Training:** Something to keep in mind that every mistake from any company will affect trust in pharma as a whole – and thereby limit the possible success for all others. For this reason alone it is important that sufficient training is given to employees on how to behave in a patient-focused manner. Ultimately, pharma can't afford to make mistakes that might reduce patient trust and, therefore, better training in patient focus is fundamental.

5. Focus across all departments: The general consensus is that everyone should be doing their part to engage in patient-focused efforts, thus embedding patient focus across an entire company. It is only through the integration of different functional expertise and methods can you gain a comprehensive patient understanding and approach.

When looking at each business or experience metric you can see the interdependencies that exist. Being patient-centric is necessary for companies that truly believe in the concept of making a positive impact in the lives of their customers. Business growth will happen because of it. By taking into account patient opinions on key decisions companies are able to build strong connections.

One example is the voice of the patient, which is a game changer in pharma, from product development, regulatory approval and commercialisation. Customer needs evolve over time and it is our duty to remain relevant. The current pandemic has taught us how quickly we sometimes need to adapt, reinvent and be there with our customers.

Channel selection

The growth in social channels such as Snapchat, Instagram and TikTok may seem like an ocean of opportunity. However, in Europe, many of these channels are too risky or inappropriate for pharma communications given the potential for reputational damage and because of the risk of industry guidelines. For example, UK Prescription Medicines Code of Practice Authority (PMCPA) guidance should be followed and the [Cases](#) brought under PMCPA highlight the type of breaches that can occur in ads or within consumer sites. For example, an ad by Vifor Pharma was ruled in breach of the following clauses of the Code:

- ☐ Clause 2 - Bringing discredit upon, and reducing confidence in, the pharmaceutical industry
- ☐ Clause 7.2 - Making misleading and inaccurate claims
- ☐ Clause 7.3 - Making misleading comparisons
- ☐ Clause 8.1 - Disparaging a competitor product

Historically, pharma's channel tactics tend to be more conventional. [The Multichannel Maturometer](#) from Across Health reveals the most widely-used tactics include eDetailing (84%), pharma-owned websites (71%), direct marketing (58%) and email marketing (57%), web banners (52%), web conferences (41%), online medical education (40%) and HCP self-service portals (36%). Activities such as marketing automation, adherence tools, social media monitoring/marketing and quantified self/self-tracking devices are a long way from becoming standard practice but they are increasing.

The reality is that although channels and opportunities are growing in number, it's neither possible nor sensible to invest in everything. Success requires understanding the right channels for a particular audience and integrating them to create a consistent experience across them all.

To summarise, the principle at the heart of understanding the difference between multichannel and omnichannel is to be selective. The goal should be to use 'many' channels (multichannel), but in such a way that there is a seamless experience across the most appropriate channels for your customers (omnichannel) ([PM Live](#)).

Recommendation

Without an Omnichannel mindset, you may be missing out on crucial opportunities to improve your brand experience across all channels, at every stage of the buying funnel.

The best way to learn more about attribution and funnel analysis is to complete these two interactive Learning Path modules. The first is our module on [reviewing media performance](#), which will help you how to use Google Analytics to review the current effectiveness of digital media and identify improvements. The second is our module on [paid media investment](#). This module will help you to discover options for using paid digital media across the most important platforms, including Facebook, Google, Twitter and LinkedIn.

DIGITAL TRANSFORMATION

Digital transformation is a staged programme of organizational improvements to business models, people, process and technologies to integrate digital marketing into a business in order to maximize the potential business contribution of digital media, data and technology.

Challenges relating to digital transformation are not unique to the pharmaceutical sector. However, unlike other sectors there is a greater level of convergence between B2B and B2C approaches:

- ✓ Payers, insurers and hospitals are no longer willing to pay simply for a product push approach; they want fees to be dependent upon the success of the products and procedures through measurable outcomes
- ✓ Rather than creating one message for one brand, the new world order of content strategy requires collaboration and engagement of consumers, who need to feel invested and in control.
- ✓ Decision-making was once the domain of the physician, but increased patient activity blurs the line as to who owns the relationship with pharma companies.
- ✓ Companies need to work within the system as strategic partners to help redesign care pathways, improve workflows and bridge system silos all while demonstrating better patient outcomes

Matching enterprise maturity to customer maturity

More than ever before patients conduct online research in relation to their health, wellbeing and treatment before making a decision to consult with a HCP.

For companies in the pharmaceutical and healthcare sector, this means that the consumer is more aware than ever of the role brands play in their day-to-day lives. Brands must therefore become more focused on building a relationship with the consumer throughout their research and decision making cycle, in the space where they are spending the most time - online.

Smart Insights recommends using capability maturity models to review digital readiness and set targets for digital transformation. This has the benefit that it is a storytelling technique that can rapidly communicate current limitations while presenting a simple roadmap or action plan. Our [free capability frameworks download](#) enables you to review both overall digital capabilities and specific activities such as content marketing or email automation.

In this section, we will review alternative maturity models that have been developed within healthcare and pharma sector to help audit digital capabilities.

Blackdot, who specialises in integrated solutions conceptualise this as an overlay of customer maturity and enterprise maturity where the activities of marketing and sales become increasingly integrated.

What Does The Maturity Process Look Like?

Blackdot's Marketing & Sales Integration Maturity Model

blackdot.



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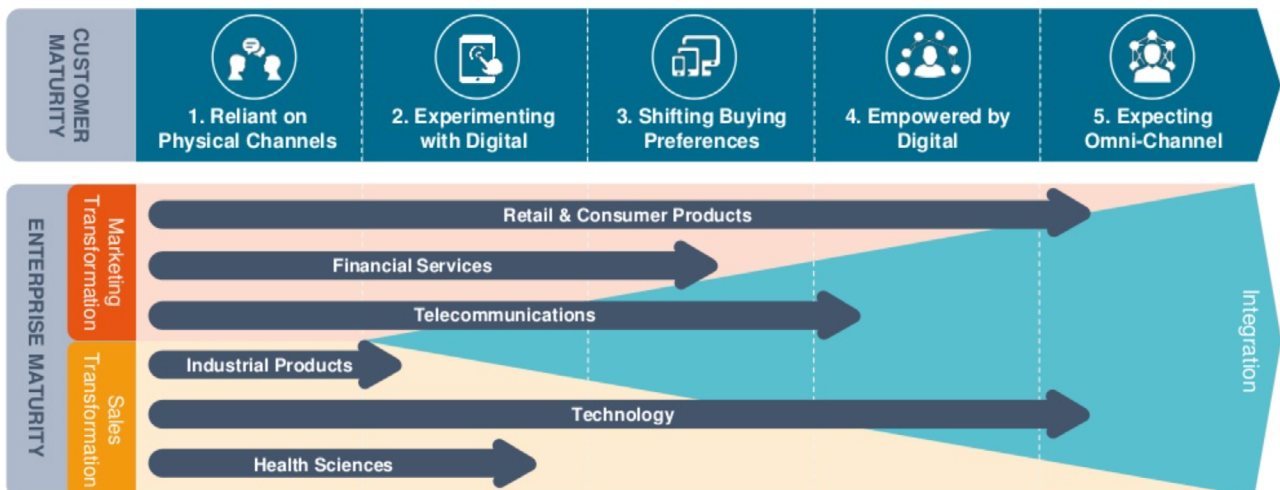
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They go further to show how health sciences generally lag in digital maturity compared to other major industry sectors.

We're All Transforming

But Are You Keeping Up With Your Customer?

blackdot.



© blackdot 2017

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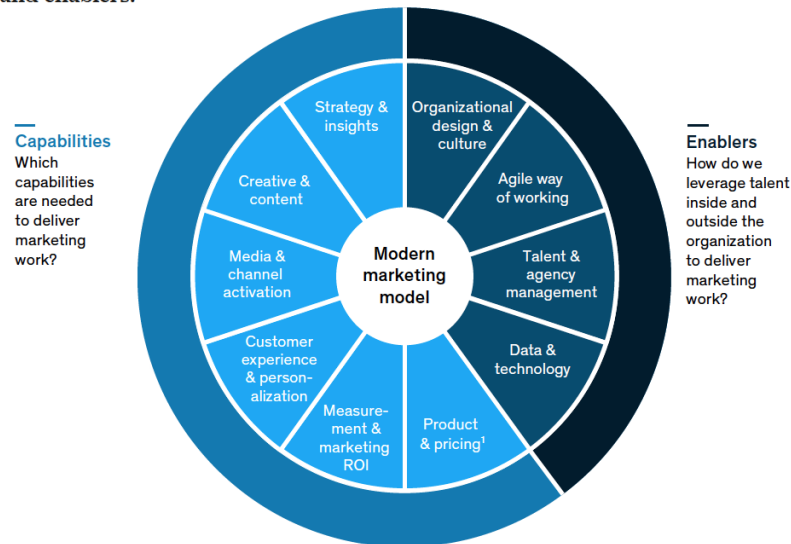
Successful digital transformation also encompasses certain imperatives to be a part of the robust vision; these include developing the culture and mindset, updating the organizational structure, governance to meet the objectives, attracting and developing talent, and maintaining a growth perspective.

To make this change a reality often companies focus on a handful of initiatives or capabilities and then grow frustrated when the promised value doesn't appear. McKinsey & Company articulated what they believe to be the core capabilities and enablers.

You will notice that technology is present as a part of the solution that still requires people to enact the processes and drive success.

Exhibit 1

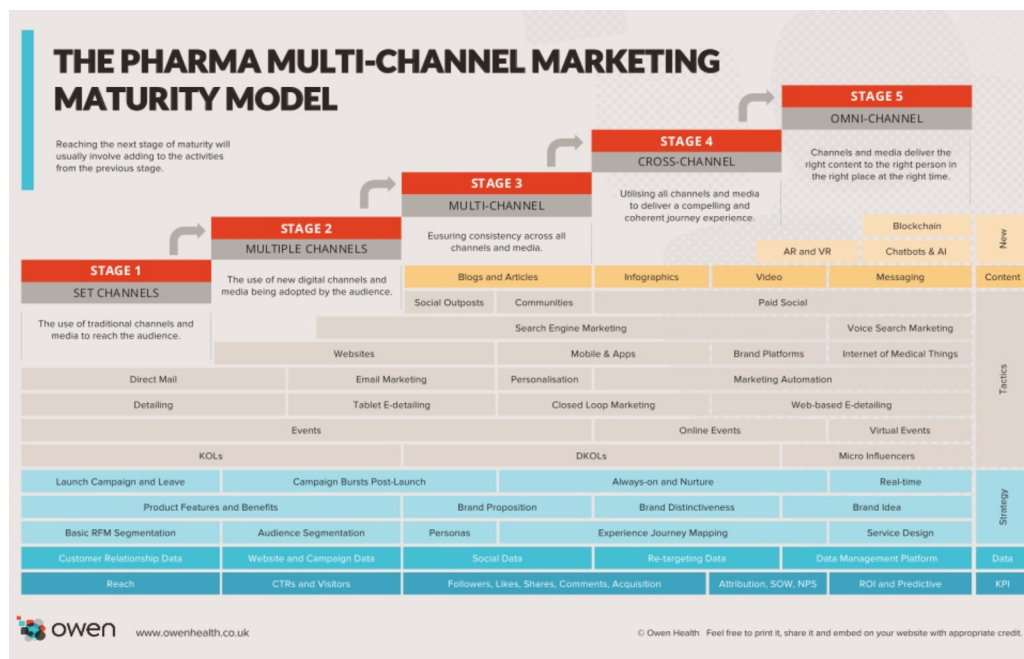
To deliver on growth, modern marketing requires updated capabilities and enablers.



¹ Capability may not fall directly under marketing organization, depending on organizational structure.
Note: Variations to the modern marketing model may exist for consumer-packaged-goods and B2B sectors.

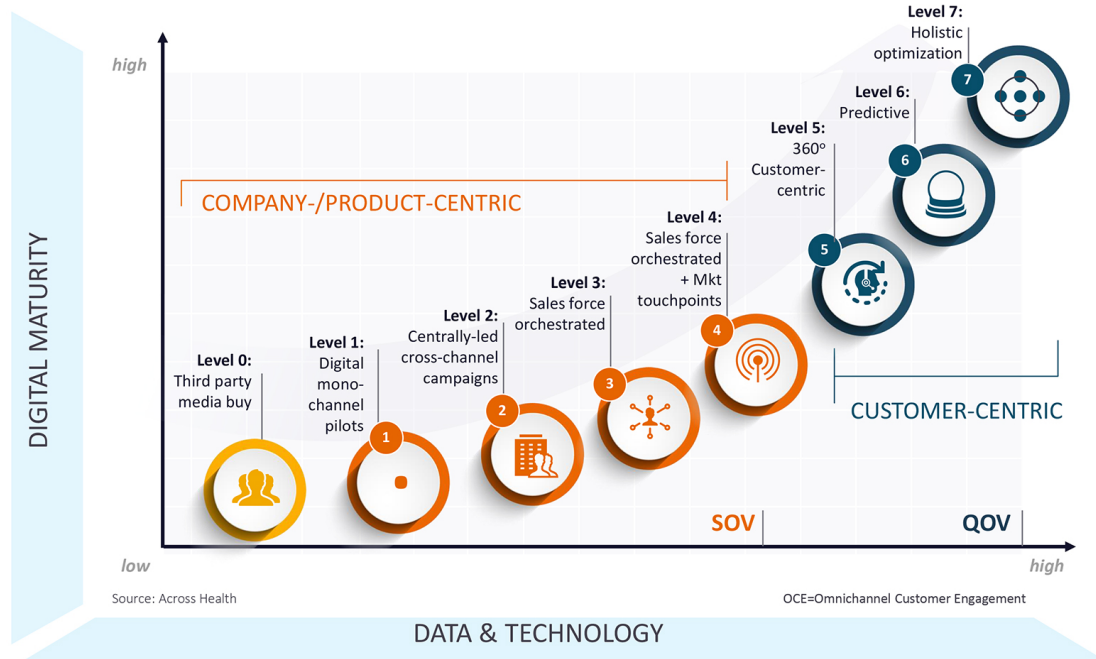
Our review of the six pillars of digital marketing available in our [digital marketing template](#) suggests similar success factors, but makes the distinction between campaign and always-on communications and the need to define contact strategies for conversational marketing.

Another maturity model, similar to our [free capability frameworks](#) but tailored to healthcare, is the Multi-channel Marketing Maturity Model from [Owen Health](#) that provides a useful one-page ready-reckoner to see where you are on your multi-channel marketing journey.



Across Health, developers of the Multichannel Maturometer survey have created a roadmap to guide businesses toward excellence focusing on Salesforce orchestration.

Our roadmap to Omnichannel Engagement excellence

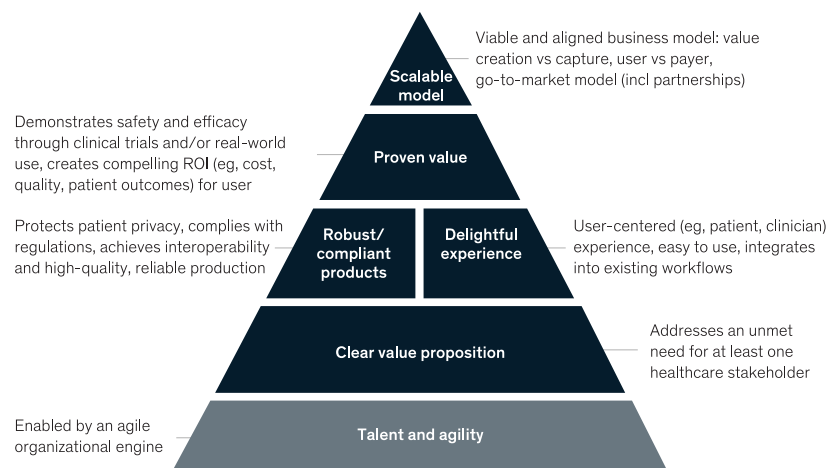


Transformation for scalability

Creating value by applying technology to address the current issues in the delivery and management of healthcare is increasing both within the business-model innovation and business building areas. However, the key to maximising returns on these transformation initiatives relies on the ability of solutions to be scalable. McKinsey & Company identified there are **six interconnected building blocks** required to build a scalable digital health business.

Six interconnected attributes work together to define a great digital health business.

Building blocks of a digital health business



McKinsey
& Company

Successful digital transformation also encompasses certain imperatives to be a part of the robust vision; these include developing the culture and mindset, updating the organizational structure, governance to meet the objectives, attracting and developing talent, and maintaining a growth perspective.

Recommendation - Marketing transformation capability assessment

Using the [Smart Insights Capability Grader](#) to rapidly benchmark your overall or channel-specific marketing activities to score your current approach and get recommendations of where to focus in the future.

Using analytics to support during digital transformation

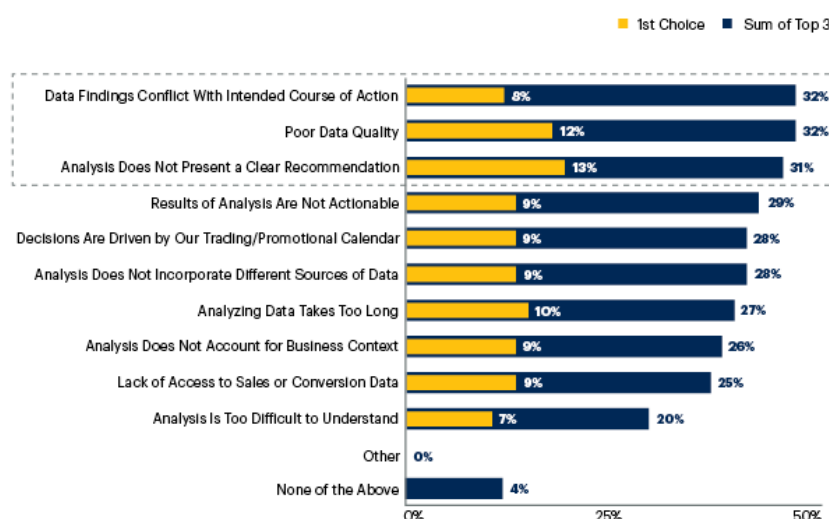
The use of analytics to uncover key 'Audience Insights' that can transform the way pharma companies communicate and engage with their customers is a critical skill. They can be used to understand buyer personas and demographics and with the increasing use of Artificial Intelligence (AI) Insights you may be able to identify certain topics, conversations, and areas that your user is more interested in and help drive your marketing campaigns in the right direction.

Getting the data is one part of the puzzle. Being able to effectively analyze and draw insights is crucial to effective implementation.

[Research from Gartner](#) found that, aside from the trouble of connecting analytics efforts with ROI, marketers cite poor data quality, unactionable results and the lack of clear recommendations as top reasons for not relying on marketing analytics to make decisions.

Top Reasons Why Analytics Is Not Used in Informing Decisions

Sum of Top 3 Rank/Top Rank



Source: 2020 Gartner Marketing Data and Analytics Survey
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Gartner

Another reason is that data findings conflict with their intended course of action.

“Confirmation bias plays a large role here,” says Foo Kune. “Marketing leaders often seek out data to help them make a case for a desired course of action or to show the value of their program.”

However, marketers must understand that having data that conflicts with a planned course of action is valuable and presents a unique opportunity to challenge controversial findings through experimentation.

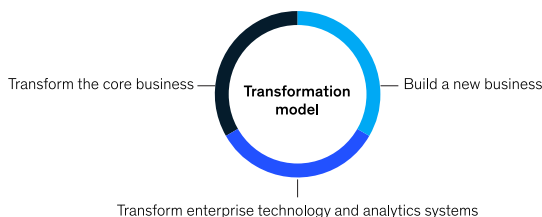
Overall, real-time audience insights can help lower and even prevent you from wasting valuable advertising and marketing resources for financial companies all while allowing them to engage and interact with your customers in an efficient, proactive, and accurate way.

Risk mitigation during digital transformation

We believe it’s important to acknowledge the risks involved in transformation due to its scope and scale and the need to ensure that transformation considers the human factors through change management rather than a focus on technology implementation. Assessing and prioritizing the risks and how they can be mitigated is also a key part of the change management process.

Digital and analytics transformations use machine intelligence, automation, and agile approaches to improve products and operations.

Approach to digital and analytics transformations



Transformation domains

- | | | |
|--|---|--|
| ○ Multichannel customer experience: redesign and digitize top customer journeys end to end | ○ Supply chain and procurement: digitally redesign and manage operations to improve safety, delivery, and costs | ○ Data transformation: unify data governance and architecture to enable next-generation analytics |
| ○ Digital marketing and pricing: revenue management, promotions-dynamic business-to-business pricing, cross-selling and upselling | ○ Next-generation operations: drive step changes in efficiency through digitization, artificial intelligence, advanced analytics, and agile-lean approaches | ○ Core system modernization: achieve through refactoring or platform replacement |
| ○ Sales digitization: digital sales, remote-selling effectiveness | ○ Digital architecture: set up digital architecture combining application programming interfaces (APIs), microservices, and containers | ○ Cloud and DevOps: migrate applications to hybrid cloud and/or software as a service (SaaS) and implement software development and IT operations (DevOps) |
| ○ New digital propositions: create new revenue streams by building digital propositions, using next-generation AI technologies to achieve cost savings | | ○ Digital and analytics talent and capabilities: acquire needed new talent and build capabilities at scale |

McKinsey
& Company

McKinsey note that companies in all industries are launching digital and analytics transformations to digitize services and processes, increase efficiency via agile and automation, improve customer engagement, and capitalize on new analytical tools. Yet most of these transformations are undertaken without any formal way to capture and manage the associated risks.

Many projects have minimal controls designed into the new processes, underdeveloped change plans (or none at all), and often scant design input from security, privacy, and risk and legal teams. As a result, companies are creating hidden nonfinancial risks in cybersecurity, technical debt, advanced analytics, and operational resilience, among other areas.

The COVID-19 pandemic and the measures employed to control it have only exacerbated the problem, forcing organizations to innovate on the fly to meet work-from-home and other digital requirements.

Recommendation - use the Smart Insights Opportunity > Strategy > Action process to review and improve your digital maturity



Define Opportunity (Situation and Objective setting)

Activities include:

- ✓ Quantify and agree on targets, KPIs and dashboards for reviewing performance.
- ✓ Review current business digital capability and performance against the target using analytics.
- ✓ Benchmark capability and performance against competitors.
- ✓ Set SMART objectives based on conversion-based models to show incremental improvements.

Set Strategy (Strategy and Tactics)

Activities include:

- ✓ Review strategic options.
- ✓ Select and prioritize strategies.
- ✓ Set the budget for investment.
- ✓ Define governance for activities.

Take Action (Actions and Control)

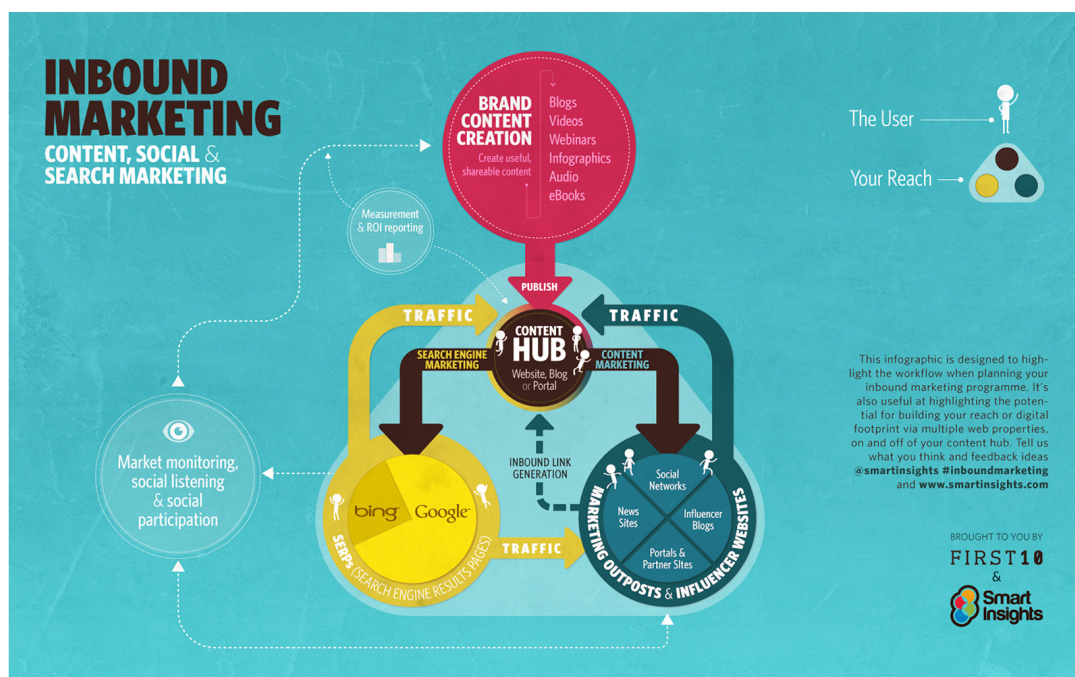
- ✓ Activities include:
- ✓ Define implementation roadmap or timeline.
- ✓ Select and schedule the best resources for information.
- ✓ Implement digital tactics.
- ✓ Review performance using analytics and optimize.

For a more in-depth explanation as well as further insight into using Opportunity > Strategy > Action (OSA), see our interactive [Digital Transformation Learning Path](#).

CONTENT MARKETING

Convincing budget holders to increase use of digital channels in the pharmaceutical industry can be challenging given legal constraints. This is illustrated by pharma's traditional investments in third party, HCP-only websites, but with limited patient information. Additionally, the role of the rep is currently undergoing rapid reimagining into more of a digital/face-to-face hybrid to find the most effective avenues of engagement during the pandemic and beyond.

Content marketing strategy involves defining both the best content types and formats to support customer journeys and selecting how to reach audiences via content distribution as summarised by our content marketing blueprint.



Danny Flamberg writing in [M3](#) highlights how online content gives new opportunities to support HCP pain points. He says:

"Unlike traditional communications, digital marketing gives you the power to truly speak to your HCPs as individual people with unique needs, so it's vital to ask some important questions. What is their subspecialty and prescribing habits? Are they in small practices or large? How is COVID-19 impacting their practice? Are they working in a metropolitan area impacted by the pandemic? Or, are they paediatricians and Ob-Gyns trying to maintain health and wellness remotely?"

"The answers will help you segment your audiences, driving uniquely relevant content that is more likely to capture attention, views, clicks, responses, and conversions. Unlike traditional HCP content, focused on science with an occasional nod to the emotional benefits to the patient, consider content that is more stimulating, contextually relevant, and personalized based on behaviors/interactions, and data."

"Digital marketing enables marketers to deliver brand touchpoints that are more targeted and frequent, in the channels HCPs use throughout their day and available on-demand. And the best part: it can all be repurposed across your brand's digital footprint, in online advertising, social media, PR, and other channels to create tremendous efficiency and increased reach".

We recommend the use of in-depth audience personas featuring detailed customer journey and content mapping to elicit these needs and plan communications around them, for example by defining top, middle and bottom of funnel content. You can learn these techniques in our learning path module on [assessing audience customer journeys](#) and related customer persona guide and template.

As an example of new content distribution opportunities, to reach HCPs and consumers, digital communities continue to grow in importance. For example, the M3 publishing and research group operates HCP communities in the US, Asia, and Europe with over 5.8 million physician members globally via its physician websites which include mdlinx.com, m3.com, research.m3.com, doctors.net.uk, medigate.net, medlive.cn, and m3india.in.

Healthcare Professionals

The outcome is that HCPs are increasingly looking for insights, not sales pitches or collateral now. They want integrated, personalised and value-driven interactions as opposed to brand-driven interactions. High-quality content is the best way to fill this need and the best way to maximise this is to invest in your own content and channels.

M3 recommend this process for developing and reviewing insight-based messaging and content indicating the processes required.



The shifting nature of information that consumers seek

Providing healthcare packages that individual patients can tailor to their own needs is a significant challenge for companies and while some companies may choose to provide such services themselves, most will function as nodes for a network of providers, including device manufacturers, dieticians, health and fitness clubs, mobile telecoms operators and compliance call centres. They will be responsible for managing the mechanics of contracting and delivering these services.

In the UK, for example, insurance giant Prudential has joined forces with Virgin Active Health Club to offer a critical illness policy that provides subsidised gym membership and rewards people who exercise regularly by reducing their premiums.

Analysing the healthcare customer content journey

One of the important uses of customer journey analysis from a content perspective is to understand your customers' goals, and what type of content helps them achieve their goals. Therefore, it's important to use the analysis to identify the gaps between what you think you're delivering and what your customers are actually experiencing.

For example, health insurance consumers are seeking simplicity, personalization, and peace of mind. Most insurance plans can be overwhelming to an average consumer so they respond well to companies that provide content in plain language that makes complex elements simple. This also means that the content you provide needs to be as complete as possible for autonomous decision making and personalized to their circumstances. Ultimately, they are seeking reassurance that they are adequately covered by a brand with a solid reputation.

There is one simple takeaway: The people who can buy your products or services more frequently go online to educate themselves before interacting and transacting with a company, especially in the healthcare space.

A solid content strategy is not only about writing content that shows your expertise, authority and trustworthiness and increases the chances that your content will show up on the first page of search results, it also focuses on posting original content on social platforms and guest posts on other highly authoritative digital platforms. Whether that's LinkedIn and Facebook or Instagram and Twitter - you've got plenty of platforms to choose from and you should be making the best of the tools available.

Webinar content: Engaging physicians and other HCPs

Beverley Smet from Across Health, sees that the market is now learning exactly what the target group wants from online. 'Our research shows that webinar viewers prefer a 30-minute webinar to a one-hour webinar and traditionally webinars in pharma are often far too long.

When it comes to marketing online activities for these webinars potential viewers are more likely to sign up when a speaker personally shares on their LinkedIn timeline that they are giving a webinar. Pharma still has a lot of opportunities to learn and experiment.'

Opportunities of using webinars to support healthcare and pharma marketing include:

Medical education

In the final 'approval' phase of a medicine or device development, it is valuable to explain to doctors what the possibilities are of the upcoming medicine. A webinar of this type provides worldwide reach and is an excellent opportunity to deliver an in-depth understanding of the scientific underpinnings of the medicine by renowned doctors who contributed to the development.

This can also be transferred to education operations within medical organisations such as hospitals. By launching a webinar series that offers scientific information on current themes, busy professionals can keep up to date with content from experts in the medical field on-demand.

Promotional webinars

Webinars are also ideal for promotional purposes such as explaining the operation of a medicine or device. During the event, doctors can ask questions which provides a lot of insight into what is going on among them. The webinar is also an excellent way to stay in touch with doctors and others within the target group in between major conferences.

Platform during conferences

During conferences and seminars webinars conducted by companies in the biomedical world play a facilitating role such as going deeper into the scientific highlights that were shared during the event. They also provide a platform for doctors and other experts to add extra insights into their new data or procedures. The added benefit of a webinar is that professionals who are not present at the live event can still receive important information and participate in the discussion.

Video marketing

Video marketing is a useful format for healthcare marketers to build trust and increase awareness around their healthcare business in 2021.

There's very little that can rival video when it comes to engagement; it's why TV ads have been the holy grail of marketing in the past and why YouTube is as successful as it is. Plus YouTube is a preferred search engine for many seeking healthcare education.

With this in mind - as a healthcare marketer, you should really consider making video marketing front and center of your marketing plan.

Options for using YouTube vary from creating a 10-second ad to play before YouTube videos or creating a channel to promote your company's vision, people and products. Video can personalize your health brand and make it more approachable in an industry where people are potentially intimidated by doctors and medical equipment (think white-coat syndrome).

[Orlando Health](#) has a great series of videos on YouTube where doctors, nurses, and nurse practitioners talk about who they are, their work experiences, but also how different medical conditions are treated. They're a fabulous example of health video marketing done right.

Recommendation

Our interactive [Content Marketing Learning Path](#) is perfect if you'd like to get up and running with content marketing or take your existing efforts to the next level.

Our Content Marketing Learning Path follows the opportunity > strategy > action model introduced in the trends above. This format helps you identify where you are as an organization and what is possible with the resources you have available. You can then take this insight and formulate a strategy to implement effective content marketing to achieve your desired goals.

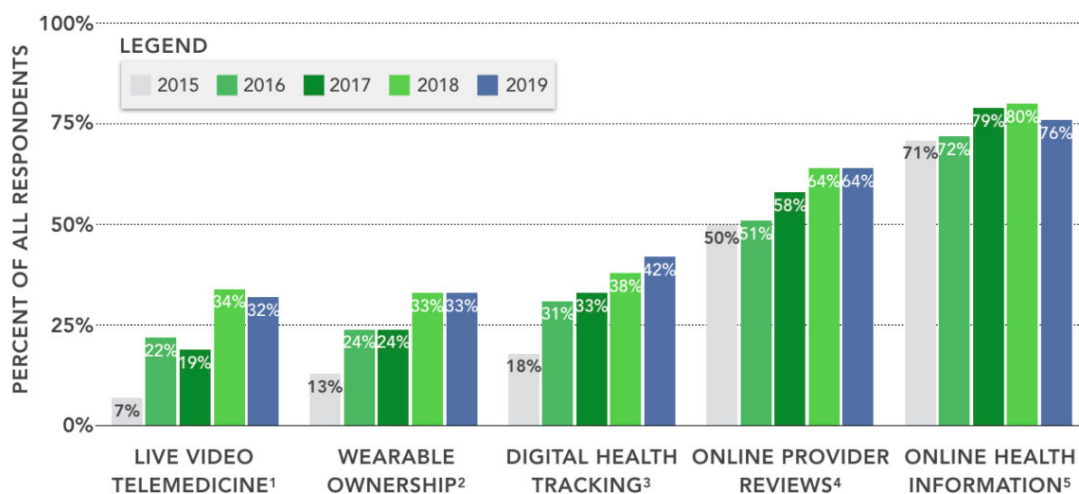
TELEHEALTH, EDETAILING AND EPRESCRIBING

The pharmaceutical industry, which traditionally engages more with providers than patients, has made a concerted effort to reach out to patients directly via new channels such as mobile applications (apps). In this trend we cover three techniques that are specific to this sector showing how their use has increased.

A review of any global life sciences company annual report illustrates that patient experience and patient engagement are both central to almost every company's strategic agenda.

A recent survey by [RockHealth](#) reported that 80% of internet-connected adults use digital health tools. The survey identified five different categories of digital health use: searching for online health information, comparing health services online, tracking health with a mobile app, tracking health with a wearable device and using telemedicine.

ADOPTION OF DIGITAL HEALTH TOOLS
2015-2019

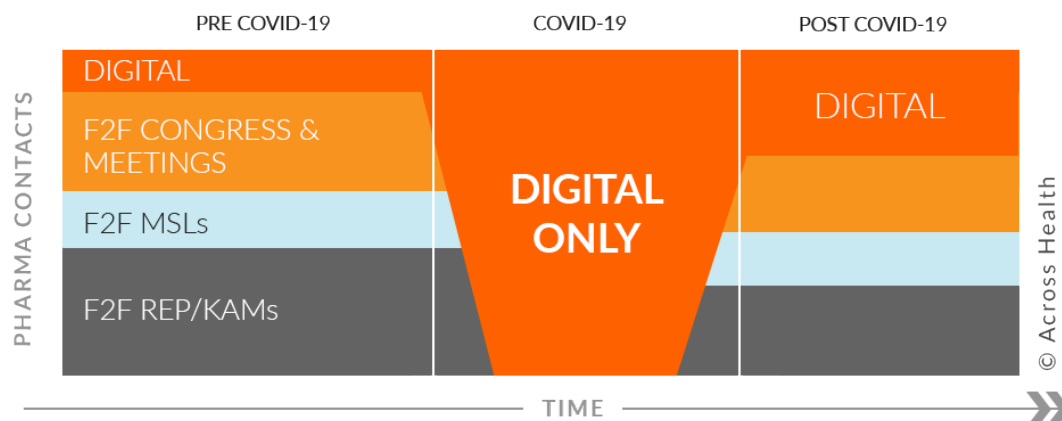


Source: Rock Health Digital Health Consumer Adoption Survey (n2019 = 4,000; n2018 = 4,000; n2017 = 3,997; n2016 = 4,015; n2015 = 4,017)

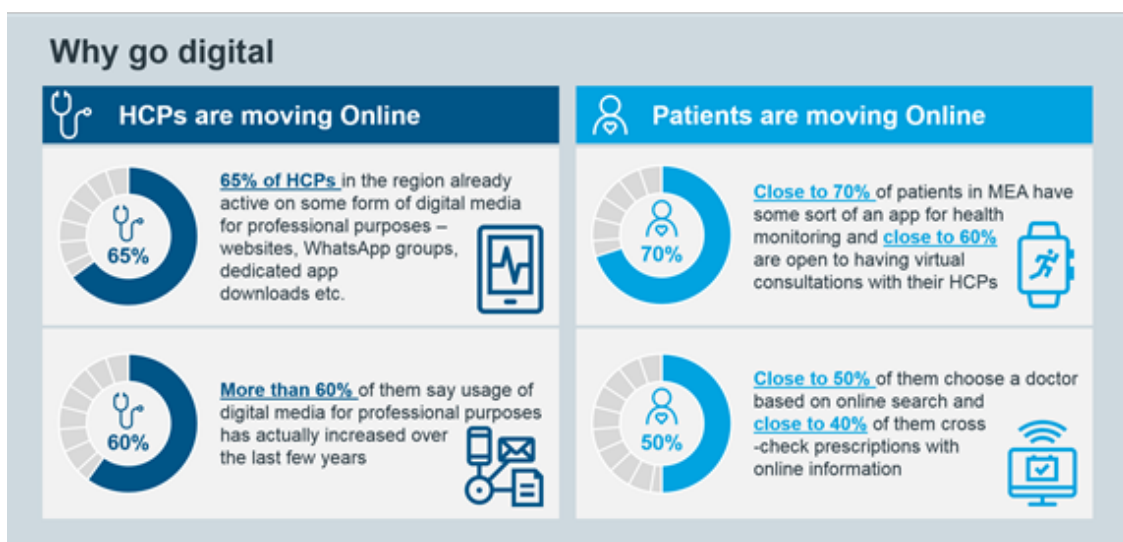
Although the industry may still be in the early stages of digital adoption, consumers are already well aware and embracing digital channels as a tool for managing their health and wellness

What is digital engagement?

Evolving digital capabilities have enabled pharmaceutical companies, healthcare practitioners, providers and patients to proactively connect with, understand and support each other. This can be over passive channels like emails, SMS, banner ads or interactive channels like chatbots and apps etc., through the use of light content (ads, banners) or rich content (games, articles).

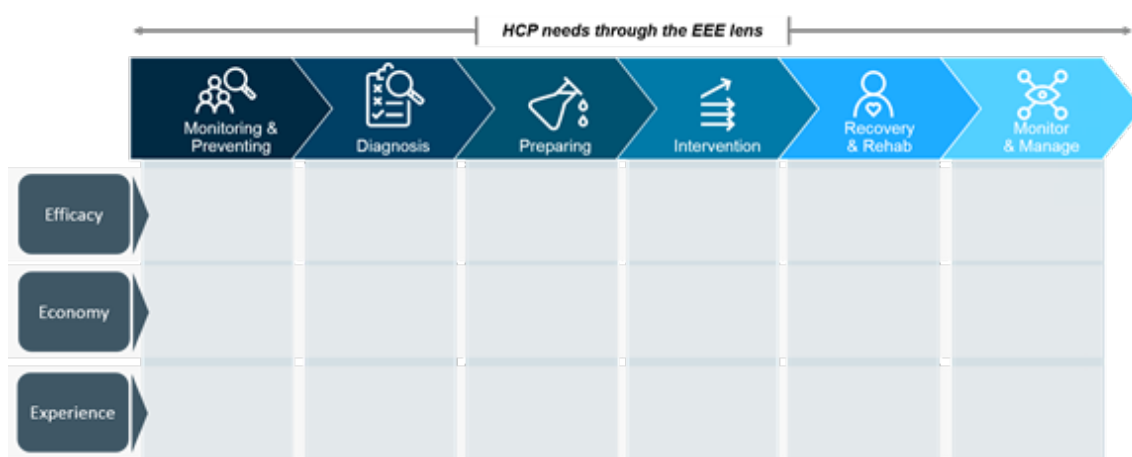


IQVIA believes that digital engagement provides the value that HCPs and patients seek across dimensions and it has opened many opportunities for pharmaceutical companies to interact directly with HCPs and patients.



They go further to suggest aligning the customer journey around the cardinal outcomes or ‘three Es’ which in the context of healthcare are:

- ✓ Efficacy – trying to maximize health outcomes, quality of cure and recovery.
- ✓ Economy – trying to minimize time and money spent on treatment and recovery.
- ✓ Experience – trying to minimize emotional anxiety during the care journey.



Telehealth

The past year has highlighted the importance of protecting healthcare services and individuals and as the pandemic raged across the globe, telehealth and remote patient monitoring (RPM) solutions became increasingly relevant. Their value was highlighted by the need for a rapid shift from contact-based care to virtual and the need for patient support in multiple locations and situations. The market also shows that telehealth and RPM are here to stay.

What is telehealth?

Telehealth is an all-encompassing term that is used to define the provision of medical and healthcare services that are accessible virtually. This can be by Type (Products and Services), By Modality (Store-and-forward (Asynchronous), Real-time (Synchronous), and Others), by Application (Teleradiology, Telepathology, Teledermatology, Telecardiology, Telepsychiatry, and Others) or by End User (Healthcare Facilities and Homecare).

Telehealth has emerged as a powerful tool with many people actively adopting teleconsultation and remote monitoring services in order to receive services while adhering to social distancing protocols. This is a technology and medical solution that's here to stay, has a far-reaching impact on medicine and healthcare and provides opportunities for marketing too.

eDetailing

eDetailing is one of the most important components in the marketing toolbox for pharmaceutical companies. Taking advantage of its possibilities can not only save time and money, it can help establish a stronger and more trusting bond with physicians. Physicians are no longer willing, or able, to schedule time blocks of time to engage with sales representatives therefore it is key for pharma companies to not only use eDetailing but to transform to intelligent eDetailing and take advantage of digital possibilities.

What is e-detailing?

E-detailing, electronic detailing, is a now well-established way of increasing pharmaceutical and medtech company efficiency in customer engagement – and enables a better service to be delivered to healthcare professionals (HCPs) and other stakeholders.

You may already know that e-detailing is information concerning things like newly marketed drugs, services, and technologies or sales content provided on a mobile device. The key is to make sure the content that is provided this way is interactive, interesting and useful for HCPs. Because the presentations are trackable it can provide data to help you better meet HCP needs in the future.

Benefits of pharmaceutical e-detailing

E-detailing offers many benefits for both your business and your customer:

- ✓ Provides opportunities for HCPs (or other stakeholders) to actively engage with content using animation and video as well as augmented reality and virtual simulations, to draw attention to key messages.
- ✓ Because this content is interactive, you can better understand what content actually interests HCPs based on their level of engagement. By tracking these interactions, and applying sophisticated analytics, it enables company representatives to work at an individual level with HCPs – providing ‘just-for-you’ communications.
- ✓ In addition to your main product arguments, an e-detailing system can provide reps and MSLS with easy access to all scientific documentation on pharmaceutical products (and additional content elements), at the moment of need. These assets can be regularly updated with fresh content that applies the lessons learned from customer data.
- ✓ Good e-detailing enables customer-facing staff, whether sales reps, medical science liaisons (MSLS) or other members of your customer team to provide a consistently high-quality experience which is crucial to implementing an omnichannel strategy.

Remote e-detailing

With access to HCPs becoming harder and the social distancing requirements in place due to COVID, remote e-detailing is growing as a necessary way of connecting with customers. By taking the physical detailing meeting online, pharmaceutical representatives and medical science liaisons are able to quickly schedule appointments when they are most convenient for HCPs.

Having quality, credible content is important and this needs to fit within the journey physicians embark on when they consume information.

When considering your ideal solution you may need to consider these aspects of your content:

- ✓ Are you willing to adapt the content you already have to match specifically the needs of the intended audience rather than general consumption?
- ✓ Can you provide this adapted and focused content on the digital platforms that my segments actually engage with?
- ✓ How will you ensure your content is updated regularly?

Social listening intelligence and links to telemedicine

Telemedicine has become a mainstay of the healthcare industry and due to the COVID pandemic has become essential to maintaining healthcare services when physical contact has not been possible. Telemedicine allows patients to access HCPs more easily, allows HCPs to see more patients, and enables patients to access specialists that may be geographically distant.

With any technology there can be challenges with implementation that need to be considered such as patients may have low digital literacy and/or limited access to necessary technology. There can also be difficulties due to drug manufacturers facing supply chain disruptions due to the pandemic leading to delays of mail-order prescriptions.

As healthcare provisions increasingly transition online, ensuring all resources (e.g., doctor discussion guide) are available online and digitized for easy use (e.g. fillable forms, easily searched) is key.

The transition can be made smoother by creating best practices for HCPs to navigate this digital landscape.

Brands need to be aware of the differences that are present across countries that may impact the uptake of telemedicine usage. Germany, for example, is falling behind when it comes to the availability of digital content in education and regulations for telemedicine. This is not surprising given the importance of privacy to Germans, with 82% saying they only share data that is absolutely necessary when using an app or digital service.

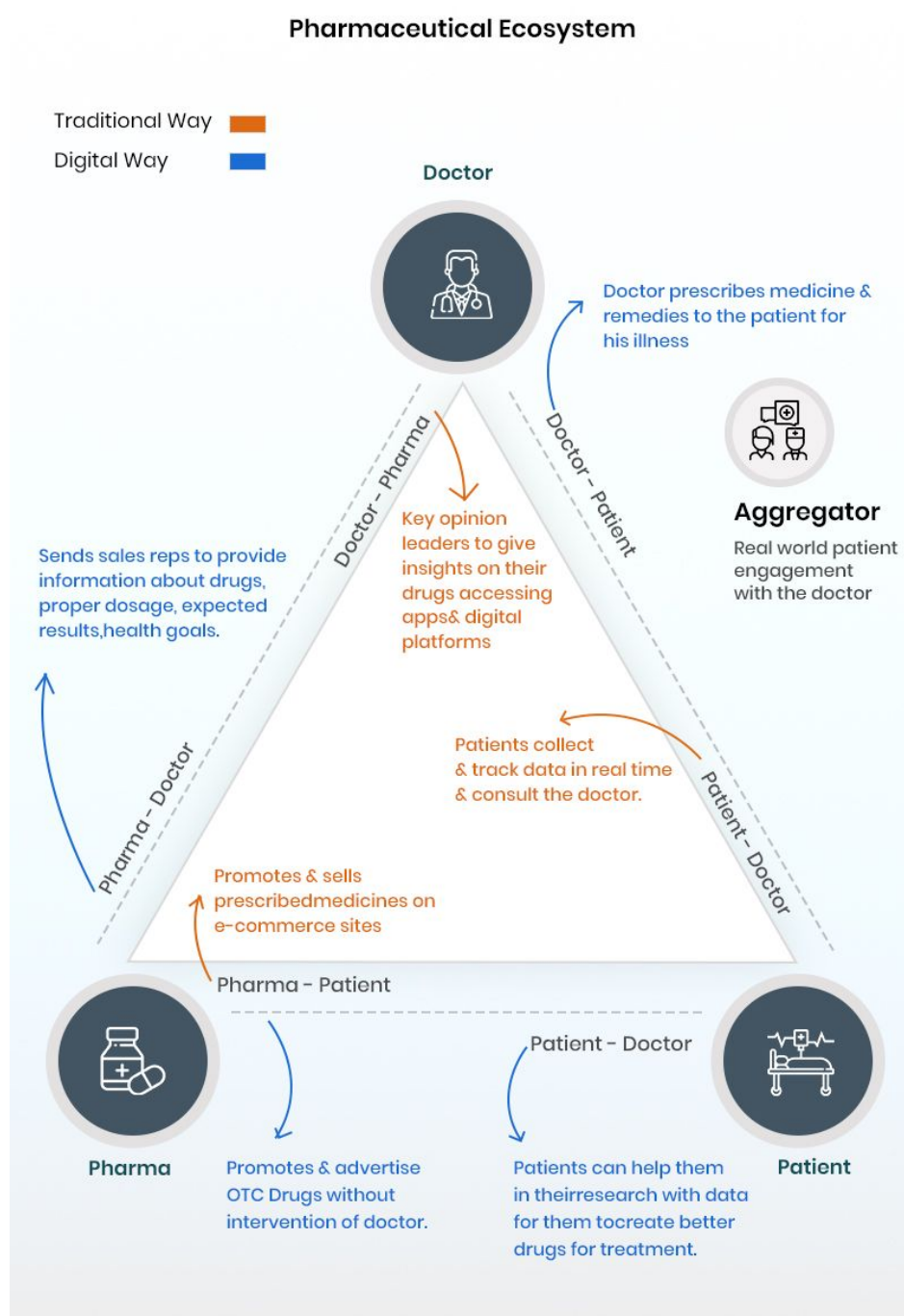
In a 2021 study by [Initiative2](#), Germany's largest non-profit network for the digital society, reported that 33% would be interested in attending a video consultation hour, 50% trust that legal requirements for data protection and data security are complied with and 30% fear that they will lose access to health care if more is shifted to digital.

A one-size-fits-all digital solution will therefore not work across all markets since attitudes to tech differ vastly. Any company looking at innovating in this space would do well to tailor to each country's unique friction points and outlooks.

E-prescribing

E-prescribing has enormous commercial implications for pharma as most of the activities it performs to market its medicines to doctors take place *before* the prescribing decision is made. Using e-prescribing could mitigate that influence, unless the industry can collaborate with healthcare payers to shape the information doctors receive.

However, healthcare payers will want hard proof that a product really is safer, more effective or more economical than its rivals, and they will have many more resources to investigate such claims than any individual doctor or practice.



Recommendations

Our Digital Experience Learning Path module on [defining digital value proposition](#) is a great place to start if you'd like to understand and create a digital value proposition. These can be essential for understanding how your organization differentiates itself from competitors and what unique propositions you bring your audience.

Our Social Media Learning Path includes [a module on social listening](#) - a powerful concept that can help you understand what your audiences are discussing and what they're interested in. The insights gained can help you with your brand and product positioning, ultimately enabling you to service your audience more effectively.

EXPERIENCE OPTIMIZATION AND CONVERSATIONAL MESSAGING

As the way consumers engage with pharma and healthcare companies continues to evolve, your organisation will naturally consider how you shape the customer experience as part of the transformation of healthcare.

How will your organisation change how it provides data and information? How will it facilitate value chain integration and collaboration in new ways? How will it provide new digitally enabled therapeutic solutions?

These changes will require reconfiguration of customer journeys and new solutions. For example, IQVIA has identified many new potential services to consider:

- ✓ Health data management and analytics;
- ✓ Care coordination;
- ✓ Personalized medicine;
- ✓ Wellness Management;
- ✓ Home healthcare;
- ✓ Remote monitoring and
- ✓ Technology enabled outcome based funding

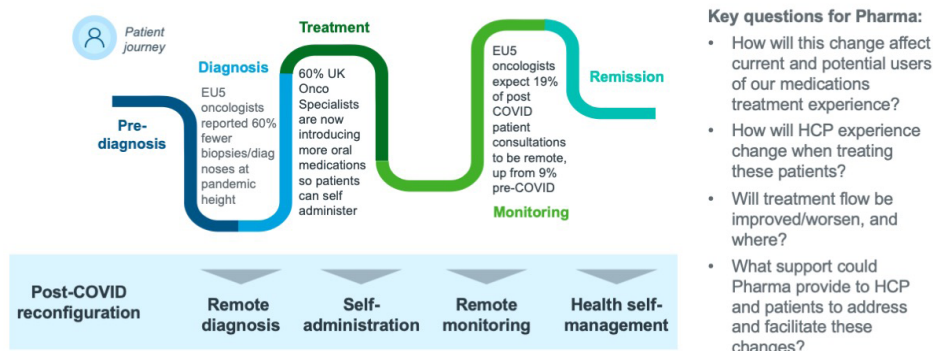
CX As The Winning Card And The Rise Of Journey Architects

When it comes to health decisions, customers tend to be focused on their needs at a specific stage, rather than on any brand. To guarantee a competitive edge, your CX strategy needs to identify all customer touchpoints in an omnichannel way that connects departments and functions and can deliver new and better integrated experiences.

The visual shows how these new types of experience relate to oncology:

Pharma needs to understand, then engage with, the post-COVID reconfiguration of patient journeys

Patient treatment moves from health facility to home, HCP/Patient engagement from F2F to multichannel



According to [Mckinsey](#), “In the last economic recession, companies that prioritized CX realized three times the shareholder returns compared to the companies that did not.”

According to Forbes Council Member [Joao Mendes-Roter](#), healthcare journey architects will rise in importance as product marketing, clinically knowledgeable tech champions to lead this new discourse. They will use agile processes, focused on services and micro-services, understand how to lead cross-functional teams and nurture a culture of design thinking and continuous improvement. They will be fluent in defining measurable events and promoting education. They will deliver to customers and generate financial impact for the business with increased customer retention and reduced servicing costs.

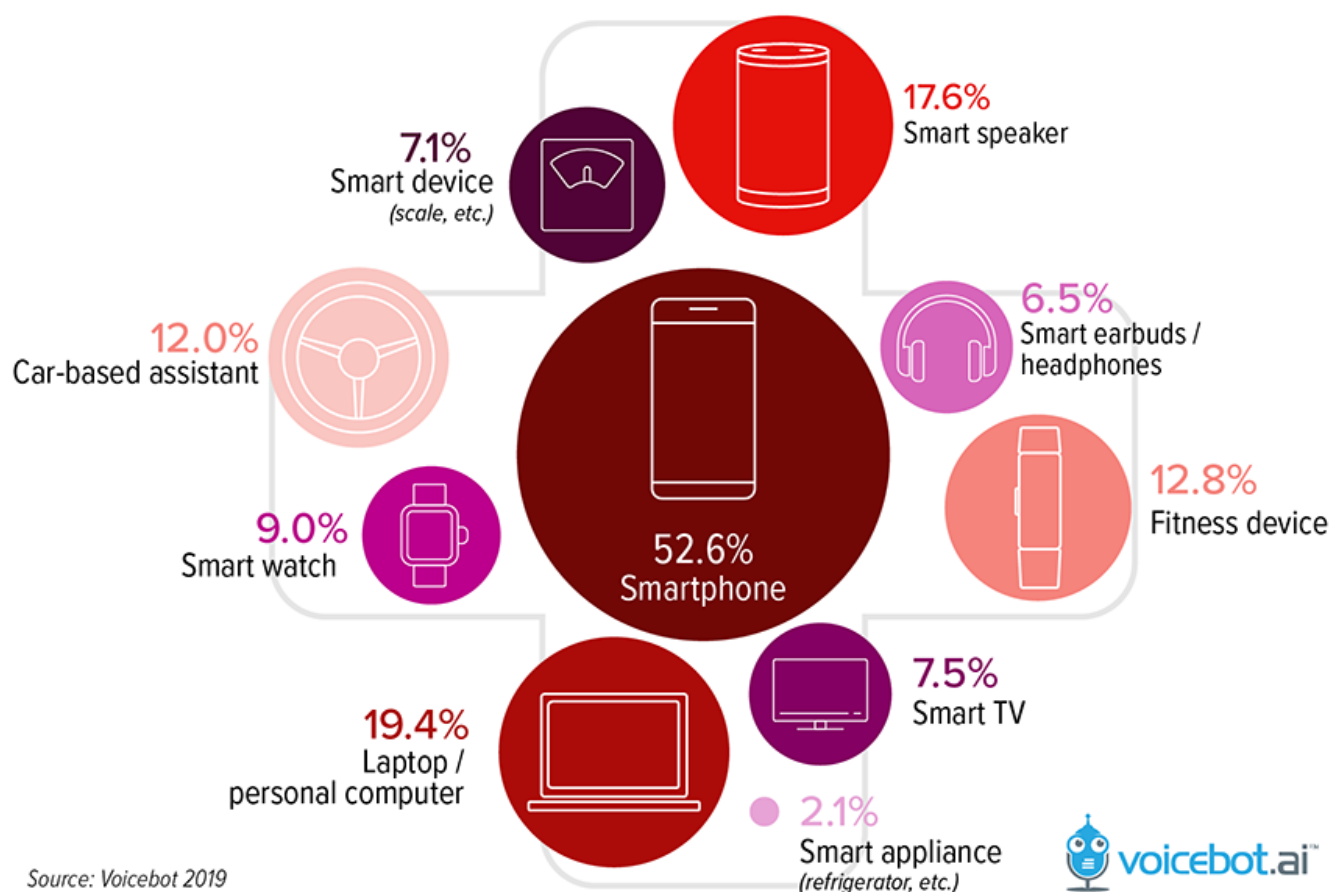
Conversational engagement

As well as understanding the moments of need for customers and patients, using technology that empowers brands and consumers to interact with each other through chat or messaging, voice assistance and other natural language interfaces is crucial to building engagement and a positive experience.

Simply put, conversational engagement uses messaging technologies and natural language to interact with customers during their buying journey by providing them with personalized help and recommendations while nurturing long-term relationships.

Voicebot.ai developed this graphic which shows consumer device preferences for healthcare use cases of conversational engagement.

Voice-Interactive Devices Consumers Prefer for Healthcare Use Cases



We recommend businesses review the relevance of these applications of conversational engagement:

- ✓ Voice activated search
- ✓ Smart speaker interactions
- ✓ Voice-based commerce
- ✓ Chatbots and Messenger interactions
- ✓ Immersive experiences

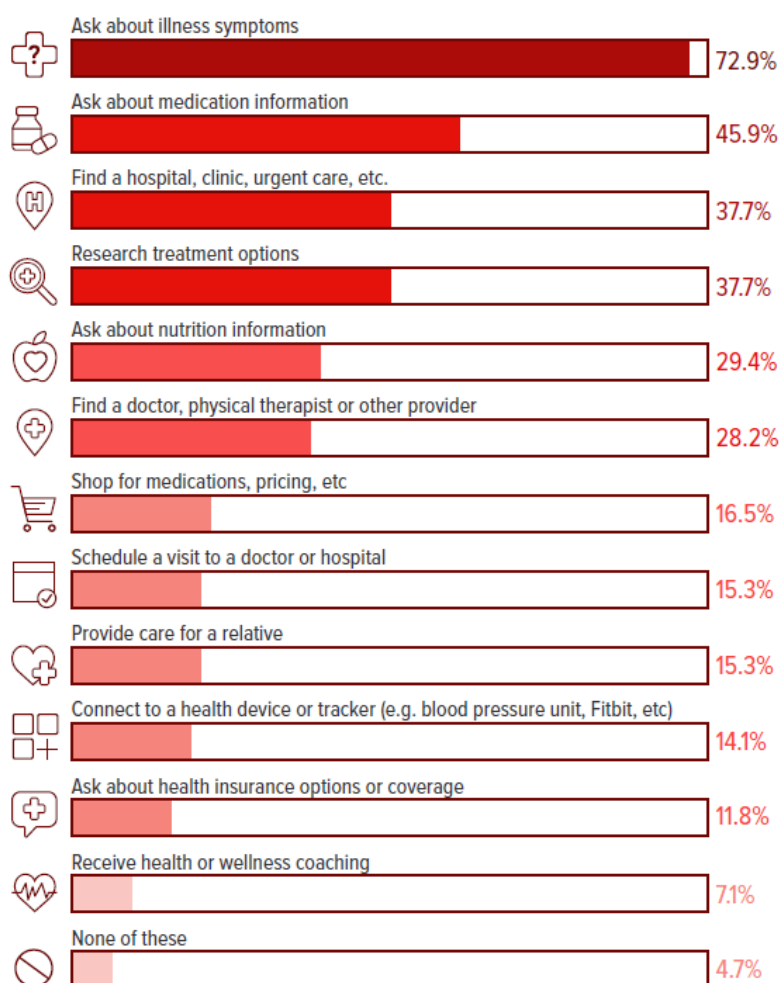
Note, however, traditional push messaging through emails, text and mobile push notifications are likely to remain important. Smart Insights believe it's essential to consider 'conversational messaging' as an integrated contact strategy that's delivered across all relevant communications channels rather than focusing on the novel technologies. Email and mobile messaging will continue to have the benefit that it can be personalised to the individual and are more widely used than chat-based platforms.

Voice-activated search

This started from the smartphone trend of voice assistants, where Apple and Google introduced voice assistants on their smartphone operating systems. We now have voice interactions through the likes of Apple Siri, Google Assistant, Microsoft Cortana, and Amazon Alexa/Echo.

According to [Chatmeter](#), one of the top use cases for voice assistants has to do with healthcare-related tasks and questions with 19.1 million people having turned to their voice assistants for healthcare questions in 2019. At the time of the research just 7.5% of respondents had used voice search, however more than 50% were interested to do so in future. This shows that voice search is changing the way patients search for healthcare which has a follow on effect for marketers in the healthcare industry.

Consumer Experience with Healthcare Use Cases on Voice Assistants - Sept 2019



Smartspeaker interactions

The increasing popularity of smartspeakers has increased the potential use for healthcare applications. While relatively few healthcare providers currently offer services through voice assistants, there are several that have taken the leap to a voice-first or at least a voice-supported future.

The most common type of voice app is focused on sharing information and is offered through either Amazon Alexa or Google Assistant. Some of the more adventurous providers are implementing solutions that enable complex features such as appointment booking and are independent from the leading consumer platforms.

A notable barrier to adoption for healthcare providers is the challenge of HIPAA compliance in the U.S. If private healthcare data may be shared by a user through an interaction with a voice assistant, the options for providers are limited to receiving access to Amazon's HIPAA-compliant solution for Alexa or creating their own assistant. As a result, few solutions today offer features that require HIPAA compliance.

Marketing for Voice search

Getting marketing cut-through and results in voice search requires content to not only be optimized for search, but specifically for voice search. In order to obtain a voice result, a property needs to obtain a featured snippet (aka position zero) for a particular search, which is read by Google, Alexa, Siri. If there is a screen, regular search results can show as well, including paid search ads and organic rankings.

Tactics to increase your presence in organic voice results

Christa Toole, Partner, Search and Analytics, Greater Than One [recommends](#) these activities are important:

Do your research: Think about what your customer would ask, how they would ask and how your content answers their query. Make use of Google's keyword tools and review "people also ask" listings in Google for relevant searches.

Use natural language keyword phrases within your content: Natural language should be used within your page titles and header tags and always build your useful content around questions people are asking and provide them with the best possible answer.

Utilize schema markup: Schema markup is structured data that gives the search engines more information about content. Search engines use this metadata to help categorize content and provide more useful search results. Pharma marketers have a variety of schemas at their disposal, including drug, generic name, drug class, condition, symptom, manufacturer, FAQ.

Follow SEO best practices: Include key terms and topics in content; create useful, unique content; develop good metadata; utilize a clear hierarchy and structure; make sure load time and user experience is good. Follow SEO best practices and guidelines for best results.

Promote your brand and content: Promoting your content, whether through PR, SEO, paid search, display or TV will help it get more traction, more authoritative links, and, in turn increase organic visibility.

Search engines will show what they deem to be the best result for a search in organic (and paid) results where there is a screen. If Google deems a result worthy of a featured snippet in position zero, you will have the voice result as well.

Voice skills and actions

Amazon's vision is to facilitate the transmission of health information and management of healthcare needs, but without compromising privacy or security in the process — and that vision might not be so far away. Improvements in accuracy will come as natural language processing systems such as BERT learn the variations of what users are saying and how they say it.

How we speak — accents, phrases, jargon — are just some examples of what has to be understood in order for AI platforms to provide accurate voice search query results.

For marketers, creating voice “skills” for Alexa and “actions” for Google devices that are triggered by users’ voice commands is a good place to focus attention. Marketers can create FAQs, educational programs, medication reminders, or programs that command an action on a device or the internet, such as purchasing a product or activating a connected device (“turn on living room light”).

With advertising it is a little different. Advertisers can't currently buy the voice search result that is read aloud however, they can ensure their paid search ads show for voice searches that are done when a screen is present. For voice-activated paid search, identifying those natural language searches and ensuring they are included in keyword lists is the first step. Creating compelling ad copy and content that corresponds to those questions is key to pulling through those hand-raisers.

Eventually, voice search in health could add an e-commerce component — specifically, ordering or refilling prescriptions via a voice-activated search or command, as Amazon is currently piloting. In order to prepare for that, Cook advises pharma marketers to “have their foundational best practices in place” for the time when BERT and similar technologies become functional additions to the voice-search landscape.

Voice and Virtual Assistants: Real-World Opportunities

For pharma, the rise of virtual assistants and smart speakers presents an opportunity, since they are being rapidly adopted by consumers, although mainly for simple voice searches to control music and simple queries.

Within healthcare a number of potential care setting use cases have been suggested, including a post-operative pain management voice assistant; an AI-powered virtual assistant that records, summarizes, approves and places the patient care note into the EHR; and an AI-powered virtual assistant that acts as a personalized companion for ageing patients that can deliver reminders and monitor daily activities.

Examples

Startups like [‘NowRx’](#) are providing patients the option to order prescription medication via Amazon Echo or Google Home. Patients can download the NowRX Skill, activate it with voice commands, order a prescription medication and have it delivered the same day.

Pharma companies like Merck and J&J are building Skills designed to help manage conditions like diabetes and environmental allergies, or answer pharma-specific questions about product dosing and indications. Cigna launched their Answers by Cigna Skill for Alexa earlier this year that answers more than 150 common healthcare questions.

Intouchsol [identifies](#) three approaches brands may consider in order to stay competitive:

- ✓ For public-facing online content to remain visible, consider that voice search is rapidly becoming a brand imperative. The ‘mobile first’ design approach is giving way to a ‘voice first’ design. Foundational SEO strategies such as schema markups, long-tail keywords, and particularly semantic search are critical for pharma to remain visible in the voice search ecosystem.
- ✓ Creating brand-specific Skills applications and pharma-specific content provides valuable communication opportunities with patients, physicians, and HCPs, and is another way to push brand-specific content into the voice channel.
- ✓ Consider including voice-enabled devices as a critical component of the overall connected experience pharma brands can provide to patients and HCPs.

Recommendations

Bring a more personalized experience to your customers by completing our Learning Path module on [Web Personalization](#). You'll discover how to better communicate with your audience and motivate them to convert by crafting a personalized buying journey that resonates with them as individuals using a range of tools and techniques.

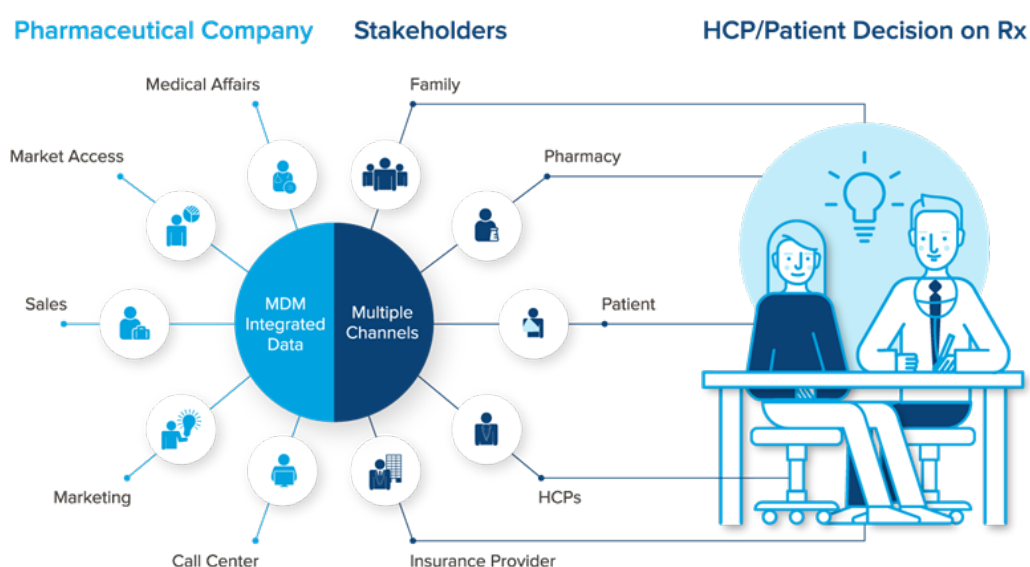
This module is part of our [Digital Experience Learning Path](#), in which you'll find many more modules that will help you bring an extra edge to your marketing efforts.

CUSTOMER ENGAGEMENT PLATFORMS

As in other industries, digital technology should be carefully selected to support aims of developing long-term relationships with customers to boost lifetime value. In this section we consider the trends in digital platforms that give insight about HCPs and customer profiles and interactions and orchestrate communications with them. Traditionally, these are known as CRM systems (customer relationship management systems), but it's more common now to talk about Customer Data Platforms (CDPs) which we will explore in this section.

Creating a lifetime of value for customers, so they'll give a lifetime of value back is only possible within an ecosystem that provides a unified view of the customer and their needs. Personalized interactions with customers based on their preferences, either stated or derived, create loyalty and alignment with customer insights.

In simple terms, this means a consistent view of the customer across many touchpoints including targeting, segmentation and performance management as shown in the graphic here.



IQVIA refers to the process of achieving this as [Orchestrated Customer Engagement](#) (OCE). It combines insight about customer profiles with their cross-channel interaction blended with marketing automation to deliver more relevant communications based on this insight.

What is Orchestrated Customer Engagement?

According to IQVIA Orchestrated Customer Engagement is a new strategy for customer engagement that represents the next big step in Life Sciences sales and marketing. Traditionally, Life Sciences companies are organized as a series of disconnected vertical silos, a structure that limits companies' ability to provide dynamic, or at a minimum, positive customer experiences for HCPs. Vertical functions such as sales and marketing tend to focus on their individual objectives, systems and messages rather than collaborating on more effective and connected customer engagements.

With OCE, data is integrated so employees across departments can access all relevant information and collaborate effectively to coordinate customer engagement activities. As a result, HCPs feel supported and trust Life Sciences companies to provide information critical to their patients.

Customer data platforms

A Customer Data Platform ingests data from multiple sources and creates comprehensive customer profiles for analysis, decisions and activation. It's a marketer-friendly solution for understanding your customers and delivering relevant, win-win communications at scale.

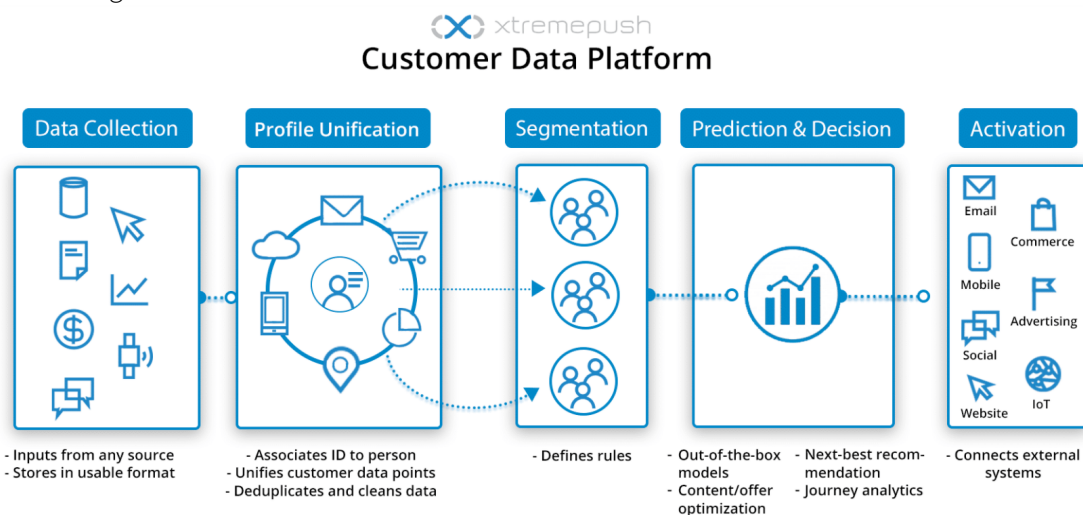
You will understand that a CDP is a marketing system that unifies a company's customer data from marketing and other channels to enable customer modelling and optimize the timing and targeting of messages and offers.

Regardless of the vendor, the key features that must be present are:

- ✓ **Data collection:** The ability to ingest first-party, individual-level customer data from multiple sources (online and offline) in real time with no storage limits. CDPs take in customer data from a variety of sources—including browser cookies, names, emails, device IDs, pages visited, demographic information, purchase history, campaign engagement, and loyalty status—and store that data indefinitely in a usable format until it has been processed.
- ✓ **Profile unification:** The ability to consolidate profiles at the individual level and connect attributes to identities. This part of a CDP creates a profile for every individual you interact with, tracks them across various devices, and eliminates redundant customer records (for example, when the same customer uses multiple email addresses). It may also match third-party identity and attribute data with personally identified customer data and aggregate related/linked customers (such as those who share a household) into a single profile.
- ✓ **Segmentation:** An interface that lets marketers create and manage segments. One of the core features of CDPs is their ability to take all that customer data you've collected and automatically create segments—that is, linked groups of people who share one or more common characteristics. All CDPs contain rule-based segment creation, but some may also offer automated segment discovery, predictive analytics, and the ability to import and deploy custom models built in external advanced analytics platforms.
- ✓ **Activation:** The ability to send segments with instructions to executional tools for email campaigns, mobile messaging, advertising, etc. Once your CDP has captured customer data, turned it into profiles, and then segmented those profiles, it needs to actually do something with the segmented lists. Activation tools send the segments, along with explicit activity instructions, to outside execution systems (such as email marketing software) in order to launch campaigns, advertisements, and so forth.

Simply put, CDPs enable automation of a step-by-step process that:

- ✓ Collects customer data.
- ✓ Unites that data into individual customer profiles.
- ✓ Separates profiles into segmented markets.
- ✓ Pushes those segments to technology that can execute specific marketing campaigns and messages.

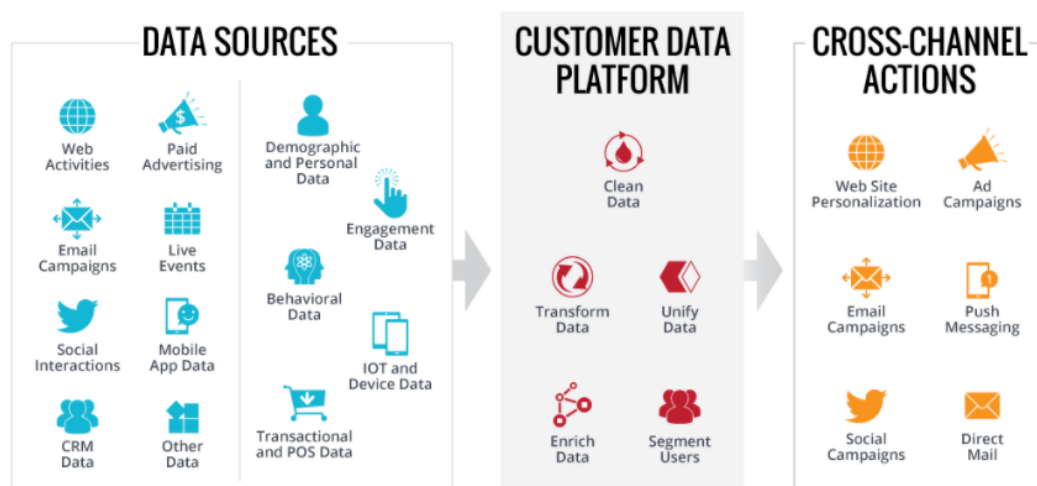


Source: [xtremepush](#)

Why are CDPs growing in popularity?

The era of multichannel marketing, driven by the changes in modern consumer behaviour, has created an overwhelming amount of data that is generated and collected across a wide range of channels. Overwhelmed by this data or simply unable to use it, brands default to generic, non-personalised campaigns. CDPs are regarded as the most effective way to unify and present this data at an individual customer's level. This is the so-called Single Customer View, which makes the goal of personalisation at scale achievable.

This visual explains the type of data included within a CDP and how it is used.



Source: [HGS Digital : What is a CDP?](#)

Once the foundation has been implemented you can build layers of other technologies such as customer relationship management, sales force automation, business intelligence and analytics.

Using this style of system, brand teams wishing to create a personalized experience for the customer via multi-channel and closed-loop marketing will be able to track relationships and behaviour using master data for an individual or entity across an entire organization.

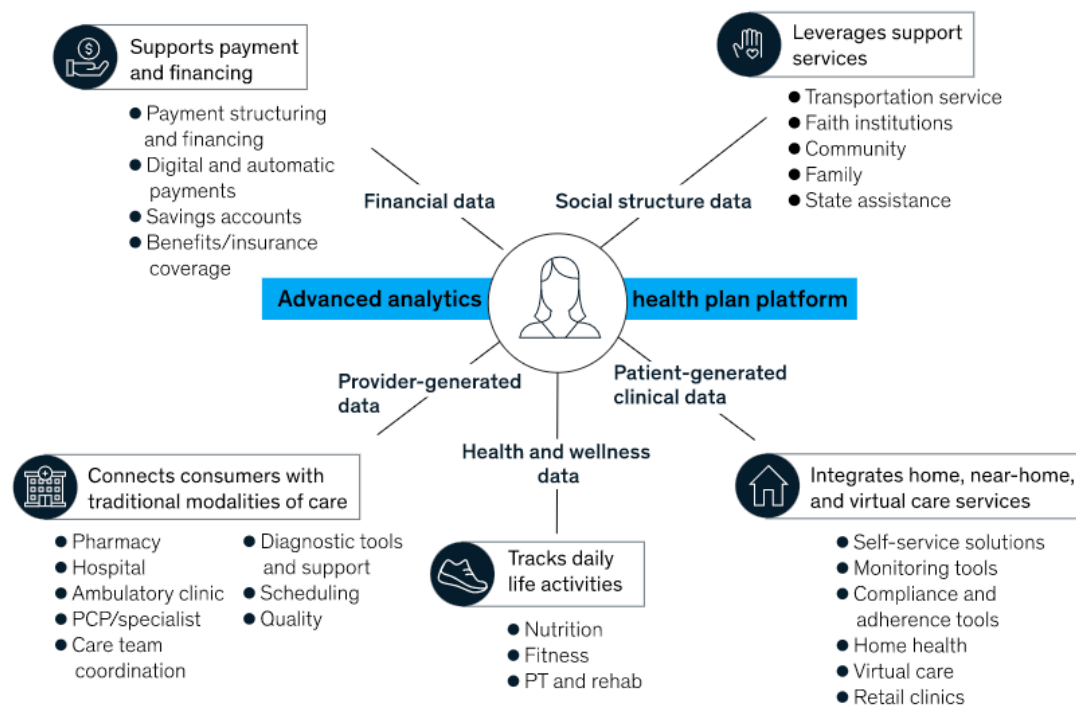
Marketers recognise the difficulties that come from working with insufficient data and the impact of poor quality data on marketing programs. An issue many are facing now is a rapid increase in available data that is held in separate and unconnected repositories. The seamless integration of customer master files that integrate with promotional activity, is now crucial to implement effective marketing campaigns.

By sharing all customer interactions across sales and marketing, details on marketing campaigns can be pushed to sales, and then feedback from sales can be looped back to marketing for real-time campaign assessment and adjustment to provide a more meaningful and beneficial dialogue with the customer.

At a larger scale, this graphic from McKinsey shows the range of interconnected elements that could be used to support better health outcomes.

Exhibit 1

Healthcare ecosystems of the future will be centered on the patient.



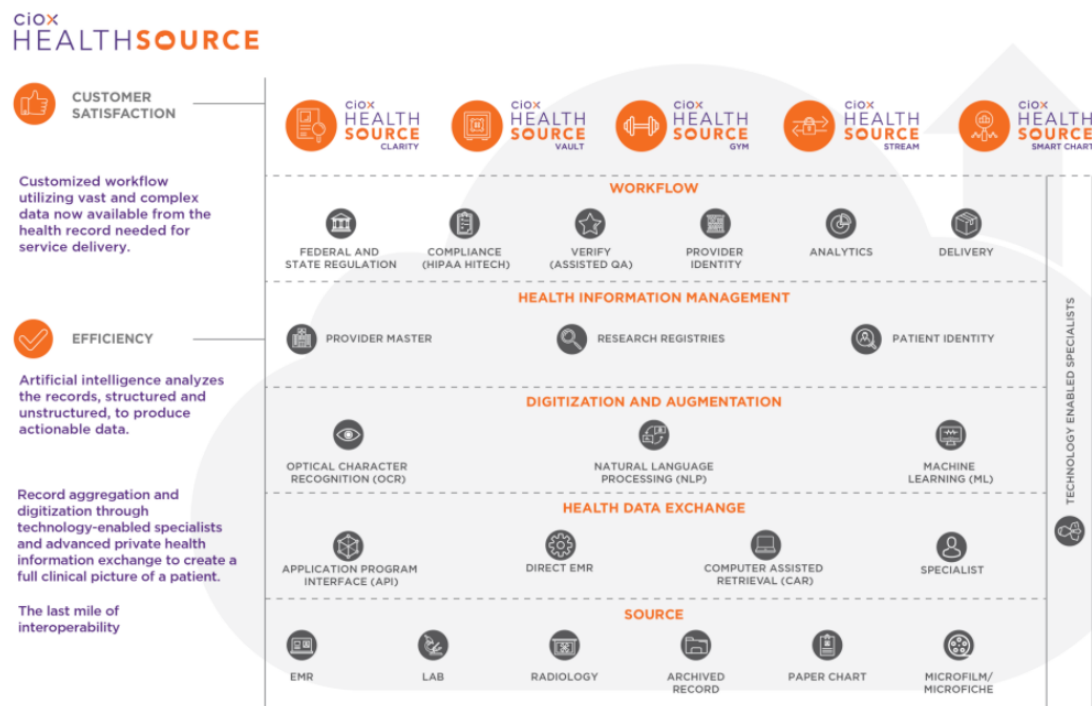
McKinsey
& Company

Source: [The next wave of healthcare innovation: The evolution of ecosystems](#)

Clinical Data Platforms - The other CDP

Clinical Data Platforms is a closely related concept to Customer Data Platforms within healthcare. As an example, one US provider, Ciox Health, handles 40 million requests for health information each year which helps providers and patients alike by managing every aspect of health data requests, retrieval and analysis.

Of particular interest to marketers is Ciox HealthSource, which is a secure, cloud-based information sharing platform that aims to integrate the process of clinical data exchange and workflow across different sources and formats.



Source: <https://www.cioxhealth.com/ciox-healthsource>

Achieving integration across these different sources has been an ongoing challenge given the number of providers and range of conditions all requiring separate data. The future will involve collaboration facilitated by large providers using standard APIs. Google is one large provider that is seeking to use standard APIs.

Google's Cloud Healthcare API

The [Cloud Healthcare API](#) provides a managed solution for storing and accessing healthcare data in Google Cloud Platform (GCP), providing a critical bridge between existing care systems and applications hosted on Google Cloud. Using the API, you can unlock significant new capabilities for data analysis, machine learning, and application development, and use these capabilities to build the next generation of healthcare solutions.

The API is comprised of three modality-specific interfaces that implement key industry-wide standards for healthcare data:

- ✓ FHIR, an emerging standard for health data interchange
- ✓ HL7v2, the most widely adopted method for health systems integration
- ✓ DICOM, the dominant standard for radiology and imaging-related disciplines

Each interface is backed by a standards-compliant data store that provides read, write, search and other operations on the data. These data stores also provide an interface into Google Cloud's high-capacity Publish-Subscribe (Cloud Pub/Sub) product that provides a clean, secure integration point for applications. Cloud Pub/Sub integration can also be used for invoking data transformations in Cloud Dataflow, executing serverless applications using Cloud Functions, streaming data into the popular BigQuery analytics engine, or generating clinical outcome predictions by sending data to the Cloud ML Engine machine learning platform.

Edge computing in healthcare

Cloud computing has become ubiquitous over the past 10-15 years, but according to this article on edge computing in healthcare (Can Edge Computing Be A Game Changer For the Healthcare Industry?) there is new recognition that there is a need to coordinate centralized data storage facilities or cloud storage which is distributed over a wide-spread network. The majority of this data comes from different locations such as clinics, individual hospitals, etc. and it usually comes in an unstructured form.

Edge computing, also called fog computing, is helping healthcare institutions distribute their data to make it available quickly and securely. It also improves network efficiency, as it also reduces the amount of mobile data.

What is edge computing?

Software and services which perform tasks previously requiring human analysis and interaction. Marketing applications of AI typically aim to improve business to customer communications including targeting media, personalised messaging and customer service interactions.

A review in Healthtech Magazine [summarizes](#) these benefits:

Enhanced Connectivity

Some of the portable IoT devices, when combined with edge computing, have greater ability to gather, store, analyze, and distribute data remotely. Edge computing can help solve connectivity issues and can work for remotely located patients as well. As a use-case, patients with wearable IoT medical devices on them can be quickly diagnosed from anywhere, anytime, and the data gathered can be distributed to a central server whenever connectivity is available. The characteristic localized processing power of edge computing can facilitate access and medical intervention for patients that are remotely located.

Connected technologies

Medtronic recently launched a wireless monitoring service for patients with cardiac disease, which enables them to send data from their implanted devices directly to their doctors. The latest devices can even be programmed to update and send patient data automatically. And other precedents for moving into health management exist outside Pharma itself.

Recommendations

Check out our Learning Path module on [defining data capture and profiling](#). This interactive learning experience will help you understand how to review your approach to data capture and how to wield it more effectively, resulting in more engaging communications that end up in front of the right people at the right time.

Good data always leads back to analytics in one way or another, so take the opportunity to ensure your Google Analytics account is in tip-top condition with our advanced module on [auditing Google Analytics customizations](#).

WEARABLE DEVICES

According to [Grand View Research](#), the global wearable technology market size was valued at USD 32.63 billion in 2019 and is projected to expand at a compound annual growth rate (CAGR) of 15.9% from 2020 to 2027.

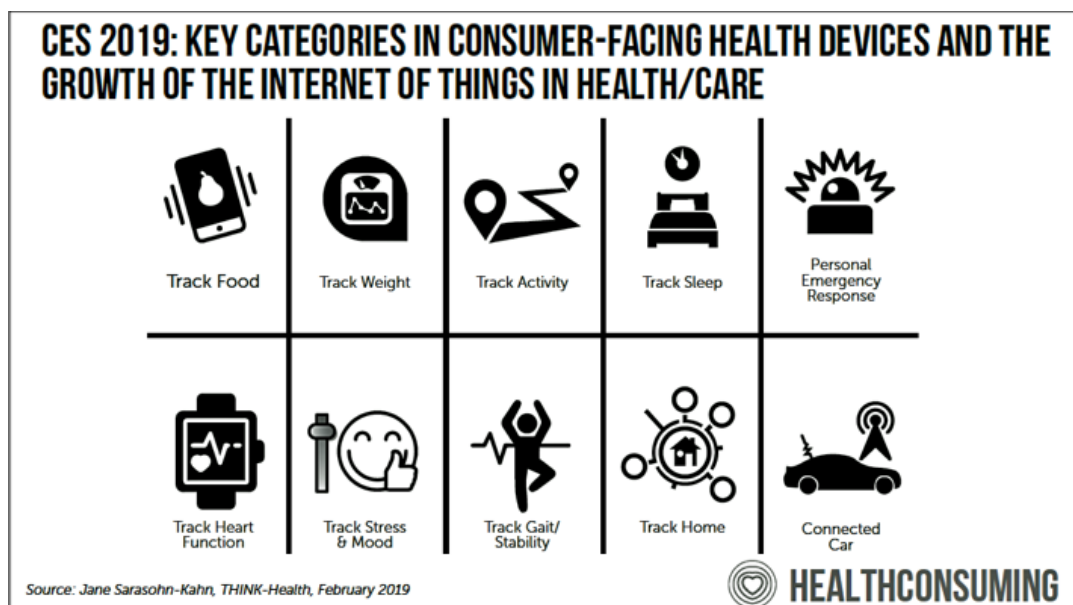
The growing popularity of the Internet of Things (IoT) and connected devices and a rising 'technically sound' population is expected to drive the demand. Cisco explains the importance of IoT and M2M when they say:

"The phenomenal growth in smarter end-user devices and M2M connections is a clear indicator of the growth of IoT, which is bringing together people, processes, data, and things to make networked connections more relevant and valuable."

When we envisage wearables it is helpful to consider three broad categories: head (such as wearable cameras, smart glasses), body (wearable activity trackers, smart clothing), and wrist (i.e., smartwatches).

Healthcare specific wearables

Healthcare applications are summarised by this infographic:



Rising concerns of obesity and other chronic diseases have led to the adoption of wearable products such as body monitors and activity trackers, which offer real-time information about the overall health. These wearable products can offer information such as blood pressure, oxygen levels, quality and quantity of sleep, calorie intake, cholesterol levels, heartbeat monitoring, and other information required by the body for day-to-day activities.

The Internet of Medical Things (IoMT)

Thales believes that we are at a tipping point for connected medical devices with The Internet of Medical Things [forecast](#) to be worth \$543B by 2025.

Healthcare solutions that leverage the power of IoT have the potential to dramatically improve patient outcomes and save lives with remote patient monitoring (RPM) – all while meeting the challenge of rising healthcare costs and an ageing population.

However, they point out that healthcare organisations need to mitigate security risks from cyberattacks against those products - putting patient data at risk and undermining confidence in the sector.

To successfully meet the needs of medical professionals, patients, and hospital purchasing departments, Thales recommend that devices will need to demonstrate the following 4 key features:

- ✓ **Reliable connectivity** - Devices that record and send critical data must be trusted to stay connected for extended periods.
- ✓ **Compliance with privacy and security regulation** - All devices must comply with privacy and security regulations such as IEC 62304, ISO 13485:2016, MDR 2017/745/EC, GDPR, and FDA standards.
- ✓ **Long-lasting** - Devices must be future-proofed by being designed to allow remote software or security updates that provide optimal performance over extended periods.
- ✓ **Ease of use** - The device must be easy for patients and doctors to connect and run with minimal intervention or set up.

The changing landscape of wearables

The COVID-19 pandemic was anticipated to negatively impact market growth of wearable devices however the outbreak has expanded the role of wearable technologies in the healthcare sector with particular efforts being implemented to use them as prompt warning systems for the virus infection.

During this time there was increasing popularity of these devices among professional athletes and recreational fitness consumers as the demand for personal fitness and wellness products increased with the closure of fitness venues.

One challenge is that there is a huge range of available smart devices including tablets, phablets, and smartphones, among others with end users increasingly desiring to have a single compact product that could integrate all of their monitoring and computing requirements.

Requirements for wearables

The increasing popularity of wearable devices is constrained by what they do and how they do it. Specifically, the most important features of wearables reside in them being:

- ✓ Unrestrictive (they have incorporated hands-free technology, which enables users to performing several activities at the same time);
- ✓ Controllable (the user has the ability to control it always);
- ✓ Attentive (technologies having various sensors and functioning modes);
- ✓ Observable (giving the opportunity to use alerts, reminders, or messages in order to attract user's interest);
- ✓ Communicative (offering the possibility of exchanging information through various options such as Bluetooth and wireless networks)
- ✓ Unmonopolizing (there are several actions that the user can do at the same time, minimal attention being necessary for these activities).

And so while most people will be familiar with wearable devices such as smart watches, what are the opportunities for marketers to utilise these devices within the healthcare domain?

Just as mobile phones and tablets displaced the once-dominant PC, could wearable devices really push smartphones aside or will they work alongside smartphones?

The next generation of wearables

The first wearable technology devices like sports trackers, pedometers, and heart rate monitors have now been replaced by much more sophisticated products that are designed as a lifestyle aid, with apps for wellness, maps, local information, and seldom leave the wearer's body.

With the “always on” culture, it's no surprise that our relationship with information and technology is about to be taken to a whole new level. We expect the wearers of technology, such as Apple Watch, or other alternatives, to share more data than ever, about what they're doing and where they are. The benefit of this for savvy marketers is that they can watch closely, build a picture of consumer habits, and even try to anticipate their next move.

Personalized offers and content could then be sent to devices, relevant to what people are doing, their interests and purchase habits. This is nothing new, as personalized offers and data analytics are commonplace with the use of beacon technology in ecommerce settings, sending offers and messaging to mobile phones, based on the precise location of a consumer in-store and what they are interacting with.

One of the key strengths of wearable technology is visibility. A device that is more visible at all times means messaging is more likely to be seen instantly and crucially at the desired time to drive some action, which is of the utmost importance to retailers and brands in such a competitive retail landscape but also for health related applications. Another benefit is in measuring and monitoring consumer location, as well as their emotions. The ability of wearable tech to allow location to be discovered, but also enabling emotions to be measured via in-built heart rate monitors can provide insights into people's biological responses to products and services as well as situations which could provide life saving advice for people with certain conditions.

Recommendations

Our key recommendations for marketers who might be looking to investigate marketing strategies for wearable technology:

Make content “glanceable”

In today’s hurry-up world, and especially with millennials, people are interested in right-now types of content. Companies and brands need to ensure that any communication is relevant and easily absorbed in seconds, at a glance -- particularly as wearables have much less screen space.

Marketers will need to re-think their mobile marketing strategies and consider questions like:

- ✓ What information would our customers consider “just in time” and when?
- ✓ What is the most important message and how can we deliver it?
- ✓ What are the visual elements of our service or product experience?
- ✓ How can we improve the customer experience for the customer glancing at their smart watch?

Companies that offer subscription services to deliver communication to any wearable device. It is worth considering if retooling the same email and newsfeeds to yet another format is the best way to engage with your audience or whether it is better to build from the ground up.

In our Digital Experience Learning Path, you'll find a module that focuses on the [latest digital experience developments](#) which will be useful in this context.

'ON-DEMAND' HEALTHCARE SERVICES

“Is bronchitis contagious?” and “How many calories should I eat” were both top Google health searches between January and November 2020 with 1 in 20 Google searches being health-related. As we are becoming more focused on health we are seeking empowerment to know more about our own health – and act on it.

What is on-demand healthcare?

On-Demand Healthcare connects patients to the healthcare providers available in real time through websites, mobile apps or even home visits. An on-demand healthcare service includes finding support with follow-up appointments, mental health therapy, some specialist care and a variety of minor accidents and illnesses.

When we think of ‘on-demand’ our thoughts will most likely turn to the retail sector where up until recently customers often had to accept slow deliveries, or simply go to a shop if they wanted something quickly. However, as e-commerce has done a great deal to catch up with demand for fast delivery, on-demand services are the current order of the technology-driven world, and its welcome by the masses has changed the way businesses all across the globe are functioning.

On demand healthcare is particularly relevant to chronic conditions which require ongoing advice and treatment. An example is the Abbott FreeStyle Libre Glucose Monitoring System for diabetes care. This is a direct-to-consumer subscription commerce on-demand service that is well suited to diabetes care since there are standard 14-day use sensors for data monitoring that can be managed by the patient in combination with the app.

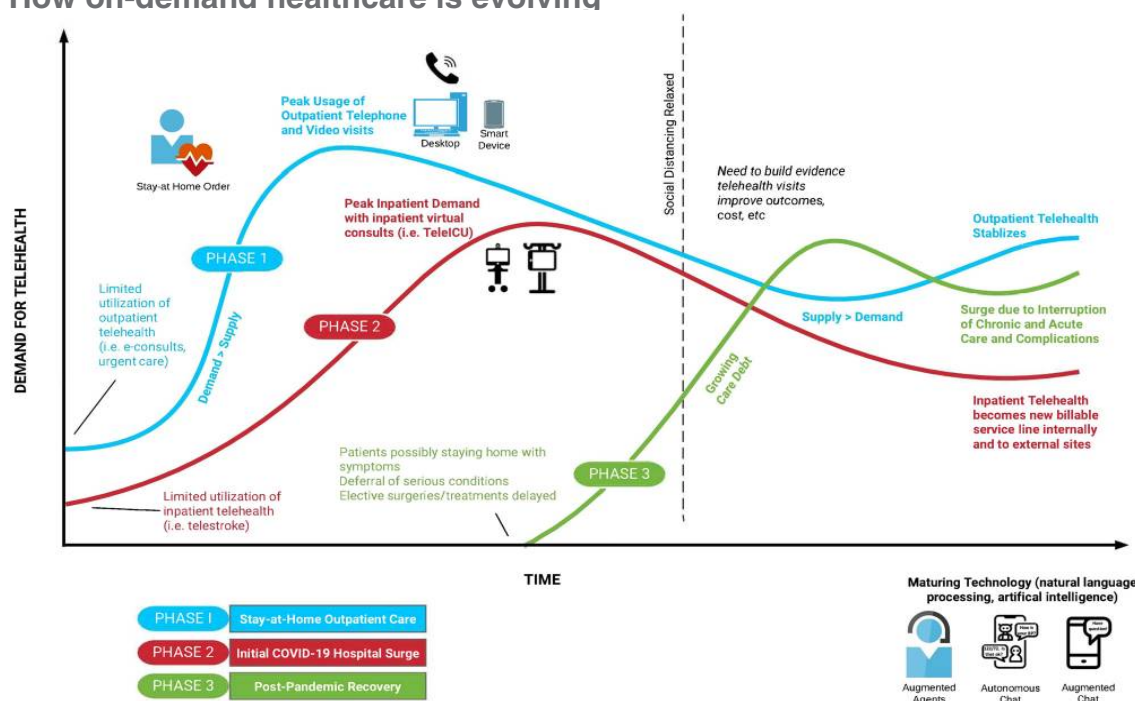
The screenshot displays the Abbott FreeStyle Libre website. At the top, the 'FreeStyle Libre' logo is on the left, and the 'Abbott' logo with the tagline 'life. to the fullest.' is on the right. A navigation bar contains links for 'PRODUCTS', 'CGM DIFFERENCE', 'PATIENT STORIES', 'BUYING GUIDE', 'SUPPORT', and a yellow 'START NOW' button with a plus icon. The main content area features a large blue heading 'JOIN THE MYFREESTYLE PROGRAM' and a sub-heading 'Try Continuous Glucose Monitoring for FREE*'. Below this, a paragraph states: 'The MyFreeStyle program will show you how to use a continuous glucose monitor (CGM) to reveal personal insights about your body through 14 days of guided support.' A yellow 'START HERE >' button is positioned below the text. To the right is a large image of an older couple riding yellow bicycles on a beach, with the 'MyFreeStyle' logo and a butterfly icon overlaid on the image.

On-demand healthcare relates to both the Convert and Engage parts of RACE since the website and app must be A/B tested to convert effectively - we have noticed that the FreeStyle Libre service has been tested in many countries to clearly explain the proposition and encourage trial and trust. Conversational messaging and customer insight about usage are important to maintain the relationship (Engage).

It relates to other conditions too in that the use of the service must be adequately supported by content (the academy) and personal advice (via Chat). Another similar system is GI Thrive, which we described earlier.

While practical logistical constraints will limit widespread adoption of on-demand services across the healthcare sector, the need for them has been accelerated due to COVID. Changes as countries emerge from lockdown are summarized by this visual.

How on-demand healthcare is evolving



Medical necessities and wellness concerns are increasing due to pollution, unhealthy lifestyle and excessive fast-food consumption. For healthcare providers such as hospitals, coping with a large number of patients sometimes gets difficult and an ongoing shortage of primary care doctors and specialists means longer waiting times for emergency treatment and hospital ERs. In this evolving scenario, it is clear that on-demand healthcare is a welcome addition in the healthcare market.

As well as easing demand for stretched resources it can engage people who skip hospital and may underestimate the severity of their illness or seek self-medication solutions that are harmful and can prove fatal.

The significant advantage of on demand healthcare is that alongside instant medical services, scheduling appointments and providing patients support. Marketers can work alongside HCP

to increase medication adherence and bring information regarding new and novel treatment options directly to the patients' attention.

When it comes to healthcare there are additional considerations to providing on-demand services. Workpath has developed an API that dispatches healthcare professionals to conduct in-home visits. In essence it empowers healthcare companies to deliver care in patients' homes. By integrating with Workpath, you can seamlessly offer in-home healthcare services to your patients – whether that's a routine blood draw or a skilled nurse visit.

Does healthcare understand the “on demand” consumer?

Growing adoption of universally advanced technologies in the healthcare sector owing to the mobile health platforms' is driving the on-demand healthcare market however just because the technology is there doesn't mean that it is being used as effectively as it possibly can be.

Using devices like mobile, desktop or any other internet connected devices, hospitals and other HCP are able to engage in virtual caring on the demand of patients, any time and from anywhere.

Another factor driving the health on demand market is the aging population. Older people who are unable to visit hospital or clinics prefer on demand healthcare services which is leading to significant growth in this area.

Understanding the challenges

From one perspective, the challenges embedded in the healthcare industry are broad and deep, and the limitations revolve around access to and free movement of data. Medical information is sensitive and often struggles to flow around the complicated and tangled bureaucracies constructed around healthcare services in many countries.

This lack of access to data and poor care coordination has worked to the detriment of patients and has inhibited health outcomes. These are big challenges for an industry negotiating digital change and it is not a unique problem.

Beyond traditional models

Healthcare delivery has reached the same juncture as taxis, broadcasting and hospitality did with the arrivals of Uber, Netflix and Airbnb. Broadcasters used to decide what people watched and when; now streaming services like Netflix allow viewers to choose and enjoy their favourite movies and TV series in one sitting. As a result, streaming services are now a vital part of all traditional broadcasters' online offerings. Whole industries have been transformed by the 'on demand' consumer and quickly overtaken by innovations.

Consumers want more connected healthcare. Over half (57%) of patients surveyed for the [Future Health Index](#) (aged 18-34) said they owned or used at least one health monitoring device, with 71% saying they would be interested in scheduling appointments online and 66% interested in receiving medical test results online.

Empowering consumers to engage in their health and take control of their lifestyle choices is precisely what connected personal health programs are designed to do. Data from our connected health devices – such as smart watches, digital blood pressure monitors and body analysis scales – supports the small lifestyle changes that make a big difference.

And as care delivery moves that way, consumers will finally be able to add real-time, connected healthcare to the other digital services they now take for granted and use every day. It will be the role of the marketer to insinuate themselves into this process to provide meaningful and timely communication.

On-Demand Healthcare is on the Rise in Europe and Middle-East

The year 2020 will always be synonymous with two words: pandemic and panic. As governments worldwide took action to limit social interaction and stop the spread of the novel Coronavirus (COVID 19) the pandemic gave people a mild sense of panic and a looming sense of dread. With this new reality of self-isolation and social distancing, there is only one place where people can turn to for mental help, physical health concerns and most importantly reassurance from a verified source like a certified doctor: Telemedicine and on-demand healthcare services.

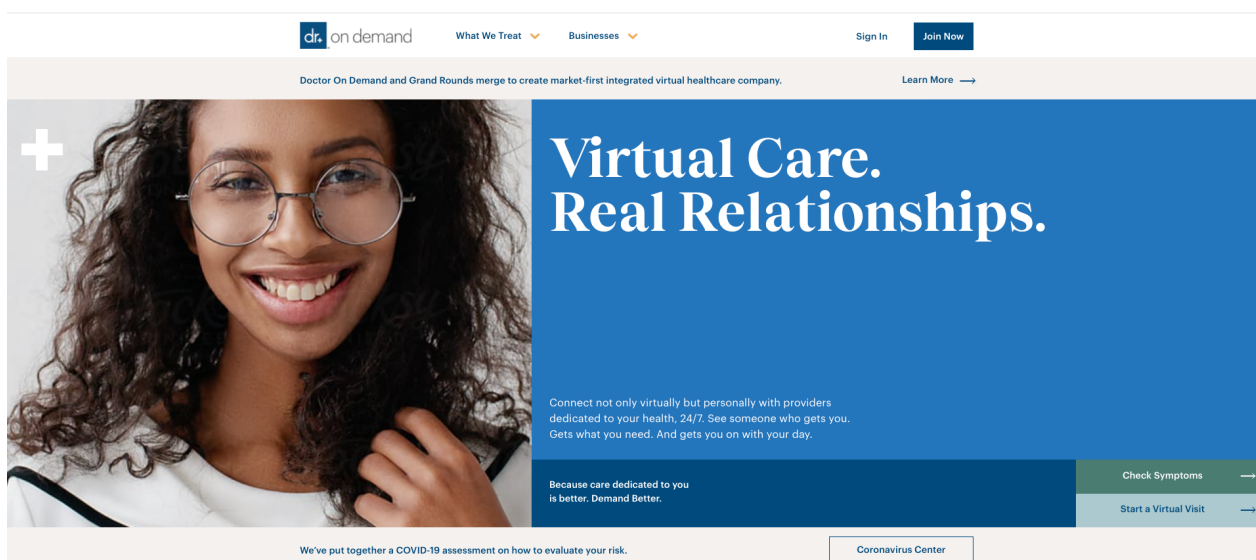
Rise of On-Demand Health Care in the Wake of COVID-19

One thing that the pandemic did highlight is that health and being healthy is critically important. Even if it's not coronavirus, there are still plenty of asthmatics, diabetics and discoverers of harmful skin diseases and rashes who need prescriptions. As the pandemic evolves and more lockdowns are eased, the remote/virtual telemedicine and on-demand healthcare services will remain as the "new normal".

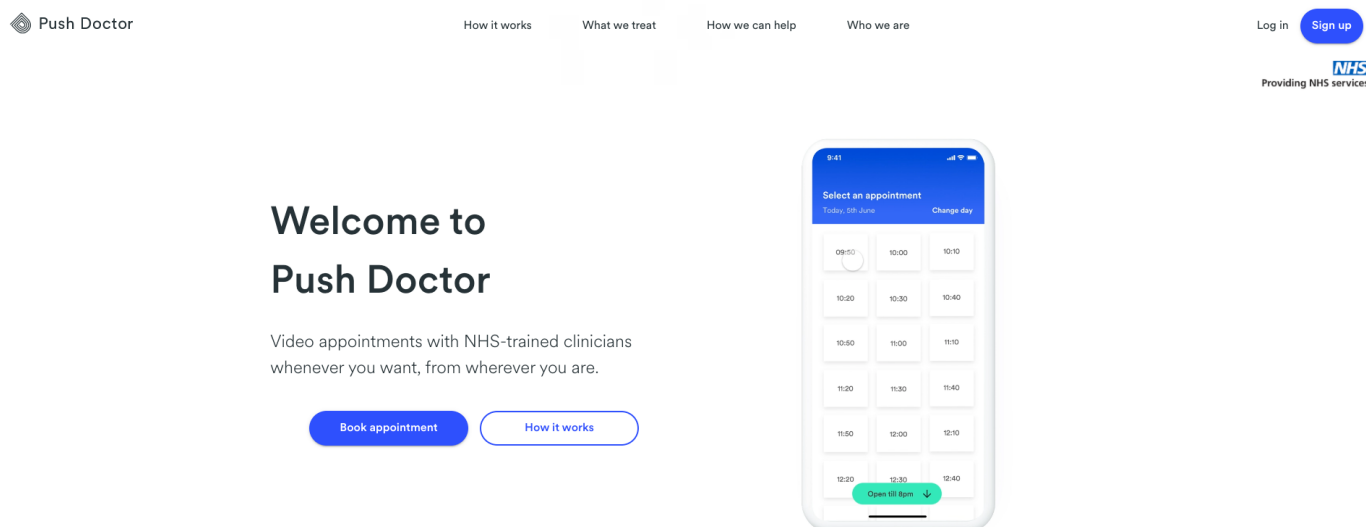
Given how healthcare has changed from an in-person, in-office experience to on-demand health care applications and virtual health care services during the coronavirus pandemic, we can anticipate that more and more people will be requesting digital health care technologies for the provision of their health demands.

Examples

- ✓ **Doctor on Demand** based in San Francisco experienced a 50% rise in virtual visits in March 2020.
- ✓ **Push Doctor**, a telemedicine company based in the UK reported a 70% increase in weekly orders since the outbreak.
- ✓ Since the virus hit the US the application usage of Amwell has increased by 159%.



- ✓ **PlushCare** reported that revenues have been increasing by 70% with an increase in doctors being hired to meet the growing on-demand.



- ✓ Teladoc health reports seeing Daily Virtual Visits up 50% during the COVID 19 outbreak.
- ✓ MDLIVE reported that in addition to a surge in virtual visit volume, new individual user registrations have increased to approximately 20,000 per day since the start of the COVID-19 outbreak.

The above figures reveal that the Telemedical and on-demand healthcare services have a certain and irrevocable future for sustainability in society.

On-demand Healthcare Business Model

Following the lead of Doctor on Demand, MDlive, HealthTap and many other telehealth platforms, more and more healthcare businesses are rapidly developing an on-demand business model. Rapidly evolving technology, disruptive innovation and virtual platforms are revolutionizing the healthcare system.

According to **ODTAP**, these are some of the most promising on-demand applications.

Doctor on-demand App

A health care technology that connects patients with nearby doctors through application and live video appointments. It provides virtual visits with board-certified physicians, psychologists and consultants. This saves the patient a preliminary visit to the doctor's office.

Except for those patients who require the use of medical equipment like a CT scan, most patients can get diagnosed and prescribed on these virtual appointments on the Doctor on-demand app.

Telemedicine App

Telemedicine technology enables healthcare professionals to evaluate, diagnose and treat patients using telecommunication technology. A comprehensive telemedicine technology can bridge the gap between the disparity distribution of doctors and the healthcare infrastructure.

These applications consist of a physician and a patient module for effective schedule management and making the doctor-patient communication smooth.

EMS and Ambulance On-demand Apps

This function requires the integration of a number of integrated apps including:

An app for the end-users to request an ambulance. An app for the Ambulance Driver to calculate the shortest route to the patient's destination and an Admin Panel for the overall management and surveillance of the ambulance and the patient's condition.

Nurse on-demand App

An app that helps patients find nurses. Users send their requests or specific requirements along with patient details and these would be matched to the skills provided by the nurses through the on-demand app.

Patient App

An intuitive and interactive patient app is essential to house the patient's profile and their medical history. Through this app, the patients can conveniently schedule appointments, retrieve their medical history and even choose their doctors.

Admin panel

The admin panel manages the overall operation and keeps surveillance on the doctor-patient interaction. It provides interactive dashboards and handles the payment verification system. It provides patient verification and allows the staff to resolve any complaints from the customer's end.

Recommendations

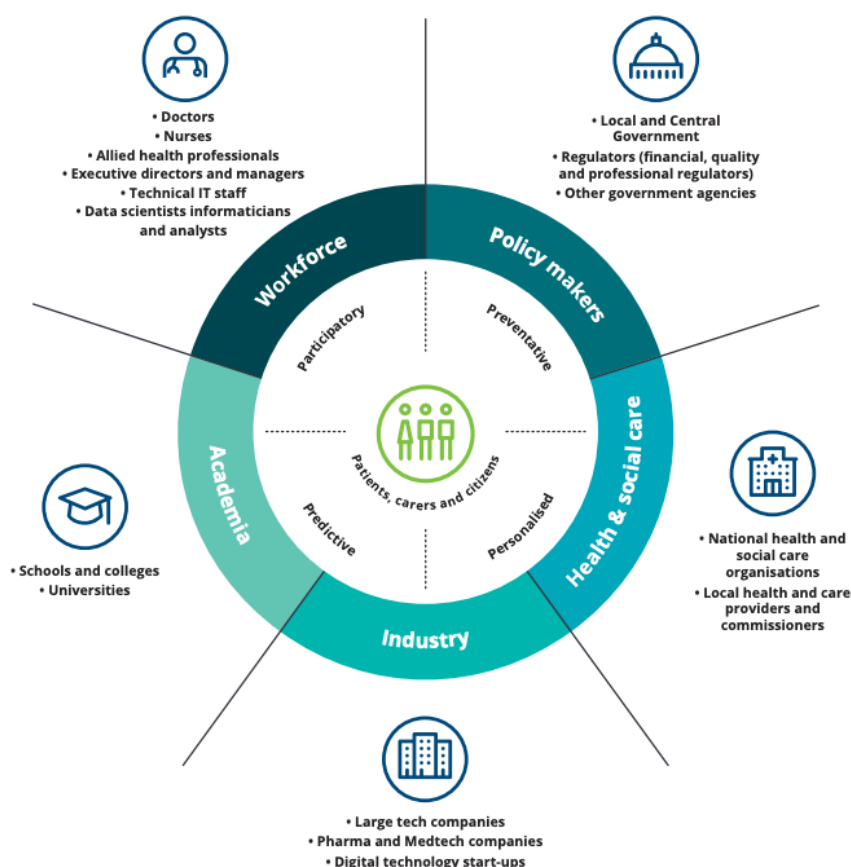
Our [Learning Path Module on mobile and multiscreen usability](#) is a good place to start when it comes to improving your site's usability on mobile devices. Our modules on reviewing and [improving mobile rankings](#) and [implementing AMP](#) will help you keep your site visible and quick to load for mobile users.

CONSUMERIZATION OF HEALTHCARE

Into the future, healthcare tech leaders will need more than good products; they will need to emphasize the full customer lifecycle with seamless customer and partner relations, supported by digital platforms and microservices, to effectively leverage the consumerization of healthcare. It is important to consider this trend in the context of wider digital health transformation to understand the wide ranging implications.

Our final trend, consumerization, acts as a broader summary of many of the more specific trends we have previously covered.

Figure 1. The stakeholders involved in digital health transformation



Source: Deloitte LLP

Source: [Deloitte](#)

What is the consumerization of healthcare (CoH)?

Consumerization of healthcare is the trend of people influencing and controlling their medical and wellness care. It is also an acknowledgment of the need for providers to develop strategies and market offerings that fulfill customer needs and preferences while fully engaging them in an end-to-end customer experience. This is the imperative in healthcare for payors, hospitals and health systems, and life sciences companies.

Primary care and specialty care are likely to become increasingly virtual, improving access and affordability and allowing asynchronous provider-patient interactions. Remote working may push employers toward supporting home-centric health offerings, and healthcare providers could ramp up adoption of artificial intelligence-based triage tools to direct patients more efficiently. Remote patient monitoring may eventually become fully integrated with chronic condition management and general patient care. Rural populations, social and demographic determinants of health, and historically underserved populations are likely to finally get the attention deserved.



Source: [Redpoint Global](#)

The increasing trend for digital, remote and virtual healthcare, as well as providers' and payors' continued expectations for multi-disease and personalized solutions, prompt the need for entirely new healthcare journeys. Their architects will need to be relatable to their customers, reflect the quality of traditional healthcare teams and offer vision with technological and clinically relevant road maps.

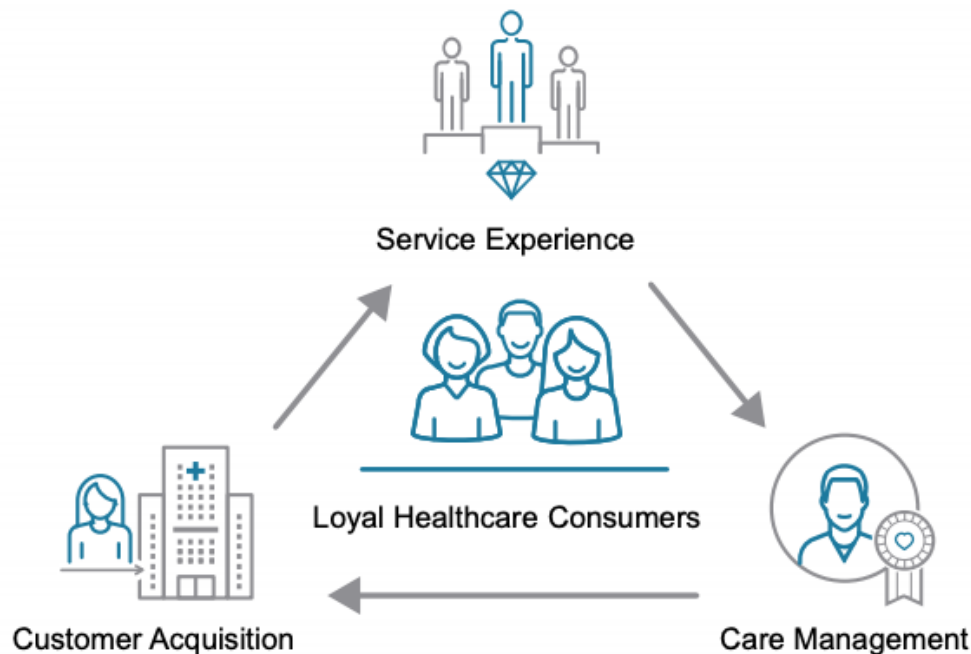
Quoted by [Forbes](#), Joao Mendes-Roter, VP Digital Marketing at Itamar-Medical suggests that journey architects will be vital for enabling physicians and the overall healthcare organization to realise the opportunities presented by the consumerization of healthcare. A week's work for a journey architect might involve meetings on strategic planning, chats with developers, calls with customers, running workshops with physicians and health professionals to curate content and products, and ongoing focus groups with end users.

This shift has accelerated long-awaited innovations and experiments, including promoting new research, at-home visits, telemedicine, digital tools for remote monitoring and healthcare provider platforms to facilitate medical information transfer.

How providers can improve patient acquisition and retention

As healthcare systems strive to recover from losses due to the pandemic, patient acquisition and retention have never been more urgent, and patient experience has never been more critical.

Developing a digital care strategy that provides a satisfying patient experience is a balancing act. Patients know an in-person visit with a specialist or that addresses multiple complex issues will come at some cost. But they expect a smaller price tag for care for low-acuity conditions that can be addressed quickly and easily.



Source: [HIMSS365](#)

Although most patients welcome greater access to virtual care, healthcare organizations need to be mindful of the digital divide and consider alternatives for patients for whom this isn't an option. Many people who lack access to broadband or WI-FI, or have very limited data plans on their phones will be disadvantaged by having a fully digital offering.

Dr. Nick Patel, Chief Digital Officer with Prisma Health makes the point that it's important for providers to wrap their digital strategy around consumerism. He says:

"We're asking ourselves: How do we meet patients when and where they want to be seen? How do we make sure costs are low enough for patients? A key mistake many healthcare organizations make is starting with the technology without looking at what problem they're trying to solve."

When investigating the introduction of technology-based solutions it is important to consider how low levels of health and digital literacy may impact patients' ability to engage effectively which can further undermine patient engagement with mobile health technologies.

Putting it All Together

Developing a digital care strategy that drives exemplary patient experiences, may seem like a tall order, but the tools you need to do so are within your grasp:

- ☐ A website (or app) that makes it extremely easy for patients to take the first steps on their care journey
- ☐ An online intake interview that gathers demographic, insurance, medical history, and info about the patient's current complaint
- ☐ Configurable triage to send patients to the right level of care
- ☐ Multiple care delivery options, including video, in-person, nurse advice, or async
- ☐ Automated clinical workflows that reduce patient wait times
- ☐ A vendor-partner that can help optimize what you do have, implement what you don't, and tie it all together so every patient encounter is as productive and satisfying as possible.

is making it difficult to fully implement customer engagement and advocacy strategies that are consistent and effective.

Data safety and privacy

Patient and practitioner concerns about data safety and privacy in the face of the proliferation of medical apps and other digital technologies means that collecting identifiable data as part of a more patient-centric approach requires the highest levels of data safety, privacy and user consent are maintained.

Corporate reputation

Patient engagement with pharma can be severely undermined by corporate reputation, largely due to past publicity about excessive pricing and a lack of transparency, public confidence has been eroded, reducing patients' willingness to engage with pharma which can in turn hinder efforts to improve services.

Decreasing loyalty

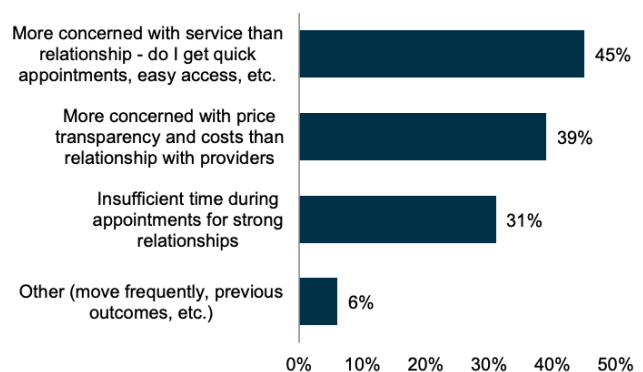
Econsultancy and Adobe, in 2019 found that there was a significant decrease in patient loyalty as the strength of individual relationships reduces and the importance of service elements like wait times, booking options and clear information grows.

Technology is only the vehicle

You will have noticed that the majority of trends presented in this report have a technology foundation. As with all new and emerging processes, there are challenges to be acknowledged when considering the adoption of these technologies.

Deloitte identified a number of challenges facing the pharma industry in its ambition to become more patient-centric. Currently, it appears that the traditional product-based pharma culture is at odds with the move to a more agile and responsive patient-centric culture and regulatory uncertainty with regard to digital technology and patient centricity

Figure 6. Reasons cited for a drop in healthcare provider loyalty



N=697

Example

HealthMatch is helping to connect Australians with chronic conditions to medical trials and news about their conditions. Chronic conditions remain a top health issue nationwide, and the technology platform aims to increase accessibility to, and awareness of, trials and breakthroughs.

Founded by Manuri Gunawardena, HealthMatch is looking to make clinical trials more consumer-friendly. The platform, which raised \$18 million in funding in 2020, matches people with chronic conditions, from eczema to mental health, to clinical trials being conducted on their illnesses. Users register and answer questions based on their conditions as well as their personal details like age and location.

The platform will then inform them of open trials to apply for. “Finding eligible patients for clinical trials is a critical and complex part of new drug discovery, yet patients are missing out on trials simply because the application process is too complicated,” says Gunawardena. “Using simple questions connected to a powerful data-centre, HealthMatch’s platform increases the likelihood of patients getting offered trials for which they are medically eligible.”

In Australia, half of people have at least one of the eight most common chronic illnesses observed across the country. Given this, it’s no surprise there’s been a rise in personal health-management tools such as pain-management, telehealth services, and at-home testing solutions that give people a firmer grip on their health concerns. Nevertheless, when it comes to medical trials, they aren’t as accessible due to factors like awareness and understandability. As the number of medical trials grows in Australia, tools like HealthMatch are simplifying access to these trials. Also boosting personal management of chronic health, Omada Health uses behavioural science to give feedback and guidance to patients, while also providing access to peer support groups.

The shifting healthcare landscape

CBInsights suggests that there will be a shift in how healthcare is perceived and tools that are enable predictive medicine, and allow patients and providers to use personalized data to impact healthcare decisions are going to grow in demand.

MEDICAL GRADE WEARABLES + PREDICTIVE DIAGNOSTICS = PROACTIVE HEALTH

Today

Reactive Health

1. Seek health services when feeling ill
2. Consumer sorts through different care options
3. Data is then captured to confirm diagnosis

Tomorrow

Proactive Health

1. Data is captured via medical-grade wearables
2. Care option reaches out if there is an anomaly
3. Provider already has historical dataset of relevant biomarkers and genetic predispositions

A [2019 report](#) by econsultancy in collaboration with Adobe found that as the healthcare industry continues to change, customer experience will be a key competitive factor. This poses a significant challenge as healthcare customers engage in cycles of monthly or yearly consultations and interactions where the outcomes are unpredictable and emotionally charged. In this environment patient outcomes paramount and marketers have responsibility for understanding and optimizing the elements that contribute to a positive customer experience during this journey.

As the consumerization of healthcare is a fundamental shift in patients' preferences, behaviours, and demands around healthcare services there is a very real threat to hospitals' bottom lines. For the first time, patients are transforming from passive recipients of healthcare services to active participants in their own health.

In the US, patients are flocking to online review sites to choose which doctor to see, skipping hospital visits in favour of a health clinic in their local area, and aren't afraid to ditch providers that don't offer them an engaging experience.

The superior customer service expectations of millennials along with more startup providers and retail pharmacies is intensifying the need for providers to revamp the patient experience.

Patients' expectations for transparency, convenience, and access are transforming the way they interact with providers across each stage of care. Therefore, the strategies health systems and providers implement to create a consumer-centric patient experience need to focus on fostering satisfaction, loyalty, and patient volume.

[L.E.K](#) placed this shift within the changes that will be prevalent for health ecosystems and longer term health provision in APAC but the findings suggest this could be the case globally.

Currently, the vast majority of healthcare providers haven't sufficiently altered their services to align with current patient expectations and this failure to react to patient preferences is hurting provider organizations' bottom lines.

With potential changes in market attitudes and healthcare delivery approaches, the future of healthcare may shift toward a 'new normal'

Potential longer-term changes in healthcare



Increased focus on digital provision of care

- With increased pressure on enhancing patient care, lowering costs, minimizing errors and improving productivity, providers will continue to adopt digital technologies



Consumerization and digitalisation of healthcare

- Patients are increasingly consuming healthcare as more-discerning customers, who are price- and quality- conscious; they are also increasingly consuming healthcare through digital channels (e.g., telemedicine, telehealth), forcing providers to change/evolve their service levels to improve experience and attract/retain patients



Changes in supply chain strategies

- Due to the sudden and extreme impact on supplier/distributor networks in light of the COVID-19 impact, organizations will be forced to consider restructuring internal supply chains (e.g., more direct distribution, expanded safety stocks), to include augmented emergency response mechanisms for increased resilience and ensured dynamic response going forward



Enhancement of manufacturing resilience through automation/digitalisation

- With risks and problems exposed in current manufacturing enterprises as a result of the COVID-19 impact, they are focused on bolstering current capabilities to enhance automation and digitalisation will evolve to ensure increased resilience to major disruptions in production and capacity

Sources: Trade press; L.E.K. interviews, research and analysis

Alternative players with consumer-focused healthcare services and tech-focused primary care startups, like One Medical and 98point6, and retail outlets, like Target, Walmart, and CVS, that offer patients on-demand access to healthcare providers via mobile apps and convenient locations are drawing customers away from incumbent health systems.

In order to retain patients — and keep them from straying to alternative care services — providers must transform their services with an emphasis on transparency, access, and ongoing engagement outside of the clinic.

Healthcare providers that tailor their services to the new healthcare consumer will be well positioned to see growth. Alternatively, businesses that don't implement these changes could find themselves falling behind the rest of the industry or closing their doors for good.

Recommendations

Both our [Digital Experience Learning Path](#) and [Digital Transformation Learning Path](#) feature a wealth of actionable insights that can help you optimize your existing output and ensure you're poised to take advantage of digital marketing developments as and when they appear. From making use of the most appropriate tools to improving how your audience interacts with your web presence, you're sure to benefit from completing both of these interactive Learning Paths.

CONCLUSION

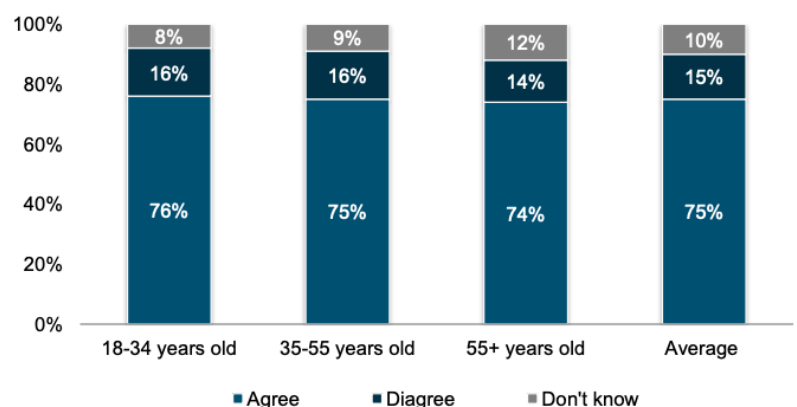
The demand and capacity challenges affecting healthcare has been exacerbated by the COVID outbreak however, over the past decade, the challenges facing healthcare providers and payers have become more profound and complex, leading to fundamental questions about the operational and financial sustainability of healthcare provisions.

These challenges include:

- ✓ Increasing demand from a growing and ageing population
- ✓ Greater medical complexity due to the prevalence of chronic diseases and more people living longer but with multiple long term conditions
- ✓ Increasing levels of demand across primary, community, mental health and acute care services coupled with a crisis in workforce recruitment and retention
- ✓ Increasing numbers of providers and payers in financial deficit and challenges in delivering the required levels of efficiency and cost effectiveness in the face of increasing demand for services
- ✓ Increasing mandates or influence from healthcare policy-makers and payers as to what doctors can prescribe. As treatment protocols replace individual prescribing decisions, Pharma's primary target audience, Healthcare Professionals (HCP) is also becoming more consolidated and more powerful, with profound implications for its sales and marketing model.
- ✓ Widespread adoption of electronic medical records will give healthcare payers the outcomes data they need to determine best medical practice, discontinue products that are more expensive or less effective than comparable therapies and pay for treatments based on the outcomes they deliver.

Consumers want to have the same experience in healthcare that they have from other businesses. From patients, to hospitals and independent HCP, this indicates a significant change in the attitudes towards modern healthcare which shows a level of comfort with innovations in delivery such as online-only pharmacies, video consultations and computer assisted diagnostics.

Figure 7. Agree/Disagree: "I want the same experience in healthcare that I get from other businesses."



Source: eConsultancy

N=2,546

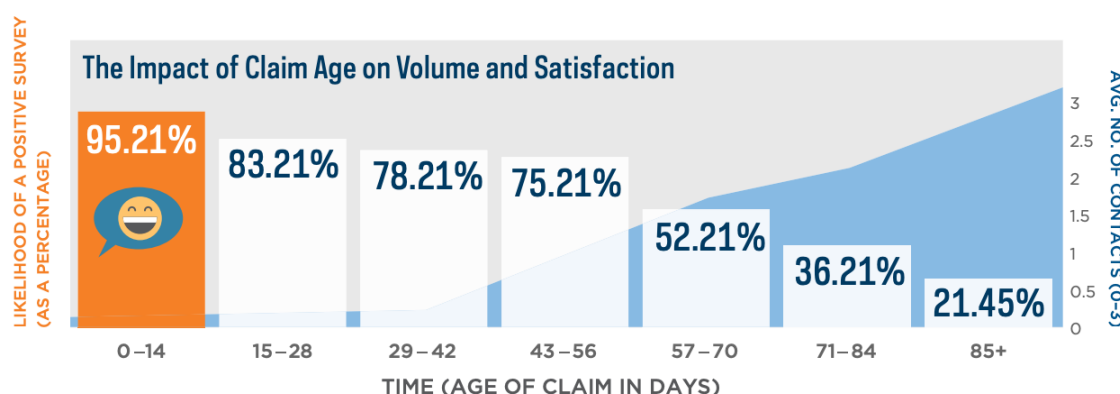
The boundaries between different forms of healthcare are blurring. The primary-care sector is expanding and the self-medication sector is also increasing as more prescription products are switched to over-the-counter status. Where treatment is migrating from the doctor to ancillary care or self-care, patients will require more comprehensive information. Where treatment is migrating from the hospital to the primary-care sector, patients will require new services such as home delivery.

If the goal of modern healthcare marketing is to promote choice and build loyalty through improved customer experience then marketers will need to understand and use data effectively. This may be daunting at the moment but the integration of context specific content and wearable devices using predictive analytics will be increasingly achievable.

Artificial Intelligence, innovative marketing technology, personalization and experience optimization, relevant targeting, adoption of good user experience as well as the other trends mentioned above, can not only help you reach a larger audience but also generate new revenues, leads, and conversions in the coming year.

When it comes to loyalty in the healthcare industry, as consumers gain more autonomy over their health care, Net Promoter Scores have also risen. This increase can be attributed to greater customer empowerment and an improved focus by some healthcare insurance plans on the experience of their members as a means of differentiating themselves from their competitors.

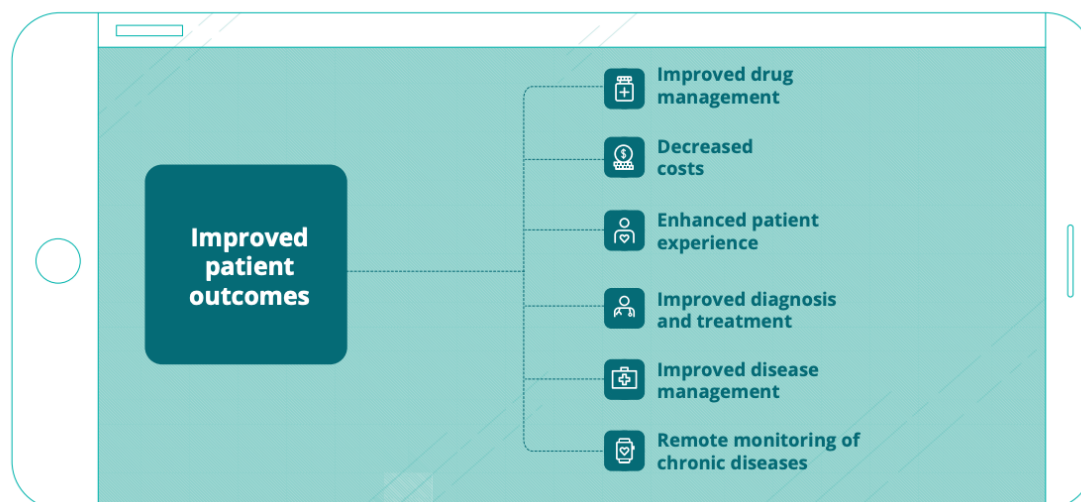
Alorica found that, in the case of claim handling, better experience resulted in higher NPS scores.



This can also be seen as a result of preventing poor customer experiences, healthcare providers and companies must redefine how they serve their members, with a strong focus on education. Small shifts in approaches that empower consumers and help clarify expectations at the outset can have a big impact on the overall experience.

As demonstrated by other industries, the most successful products of the modern age are more “experience ecosystems” than they are products, allowing customers to interact with the provider in new ways. To create these types of experience ecosystems, providers and payers are making investments in building patient portals and apps that provide easy access to patient information, claims processing, and options for providers and even virtual diagnosis.

Figure 2. The benefits that digital technologies can bring to patients



Source: [Deloitte](#)

Digital transformation of services will prove to be a key source of revenue for many and is expected to continue to grow for the years to come. In today's fast-paced, competitive and convenience-driven world, consumers no longer just visit a healthcare facility or profession but to have that expertise come to them.

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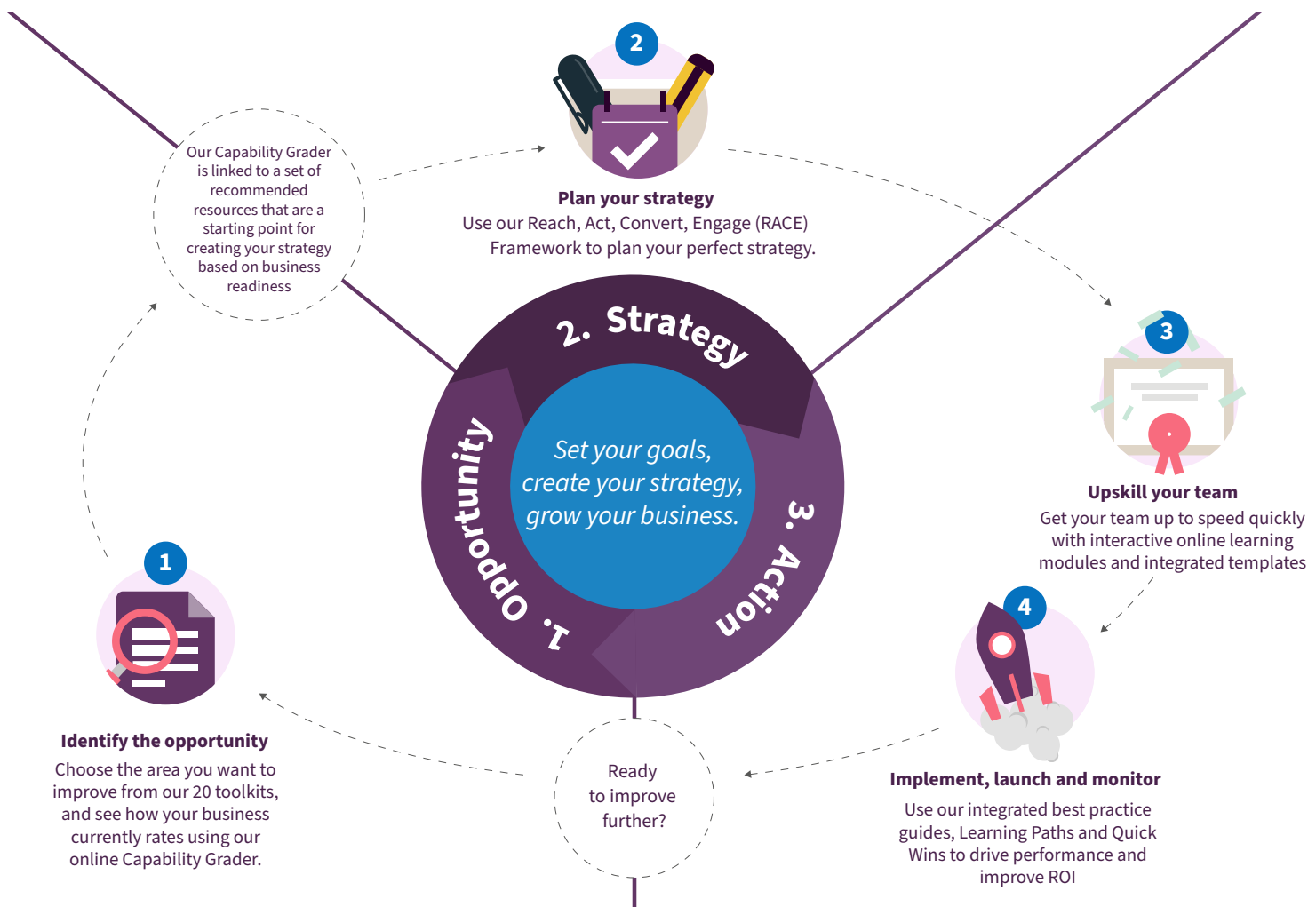
[FIND OUT MORE](#)

HOW DOES THE RACE GROWTH PROCESS WORK?

Competition is fierce online. To win, you need to plan, manage and optimize your digital channels against defined targets, SMART KPIs and a focused investment in content marketing, digital media and experiences. We believe an integrated strategy is essential to define new segmentation, targeting and position for your online value propositions.

Taking an approach that focuses on OSA - that is, Opportunity, Strategy and Action - is a great process around which to build your journey towards more strategic digital marketing.

The graphic below outlines how using OSA can focus your thinking and maintain structure as you progress through the RACE Growth Process.



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Digital Marketing CoE Leader

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"I'd recommend signing up to Smart Insights for a suite of useful tools from planning templates to strategy docs and a variety of other guides to make your job easier."

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Director

O'Neill's

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