



POINT OF VIEW

INTOUCH  GROUP®

WHAT MATTERS MOST: THE TRENDS THAT WILL SHAPE PHARMA MARKETING IN 2020

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December 2019

EXECUTIVE SUMMARY	3
DOING THE RIGHT THING	4 - 6
EVERYTHING IS POLITICS	7 - 8
TV IS DEAD, LONG LIVE TV	9 - 11
GETTING PERSONAL WITH DATA PRIVACY	12 - 13
THINK BETTER, NOT JUST BIGGER	14 - 16
CONCLUSION	17





HOW WILL YOU WORK WITH THESE TRENDS IN THE YEARS AHEAD?

Executive Summary

As we began to look ahead to 2020, we sought out the opinions of the top people in our organization; we looked to our clients and around the industry; and we looked at the world of marketing, tech, and healthcare overall. Several critical themes arose. And as we reviewed them, a larger concept became clear.

In 2020, and in the new decade more than ever, we believe that the most important trends won't just be a new tool or channel. They can involve those, certainly. But at their core, these macro-trends we're highlighting are about doubling down on what matters most: really looking at — and truly seeing — our customers and figuring out how our work can truly make a difference to them.

In the pages ahead, we review these five trends. We explain what's most important for you to know about them, recommend ways that you can stay ahead of the curve, and provide links to additional reading. And then we look to you for your reactions! How will you work with these trends in the years ahead?

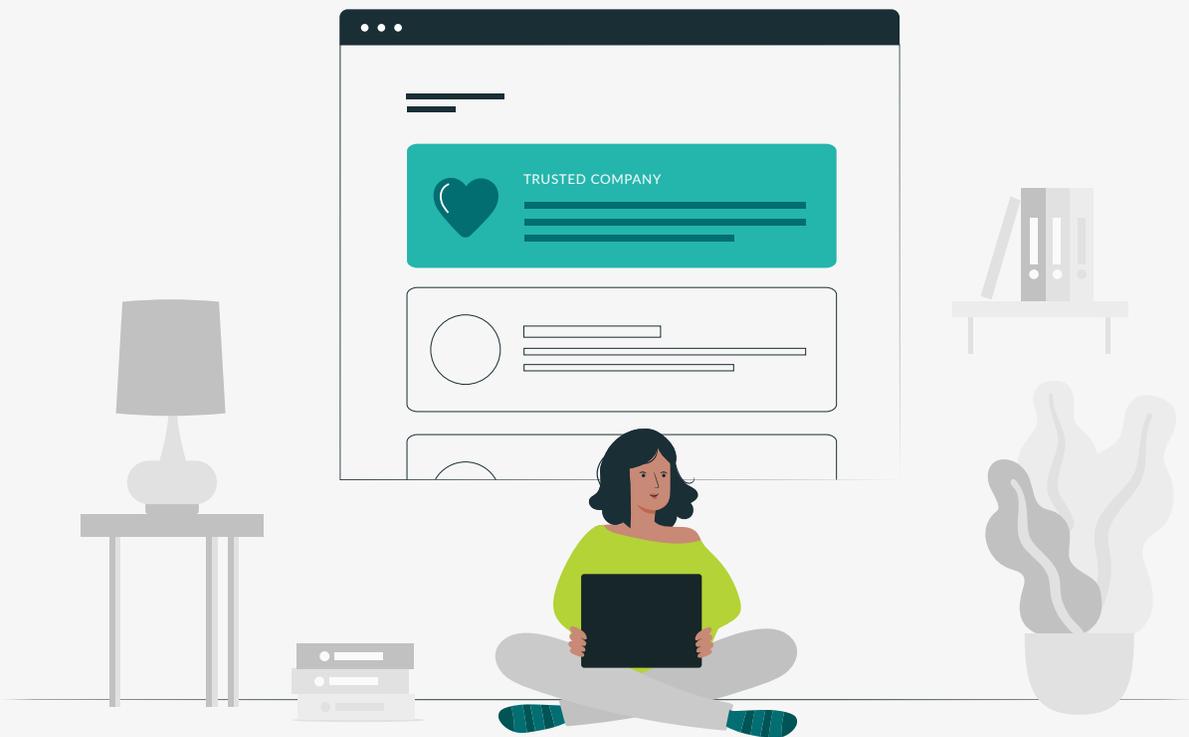
Trends for 2020

- 01 DOING THE RIGHT THING
- 02 EVERYTHING IS POLITICS
- 03 TV IS DEAD, LONG LIVE TV
- 04 GETTING PERSONAL WITH DATA PRIVACY
- 05 THINK BETTER, NOT JUST BIGGER



01.

DOING THE RIGHT THING



01. DOING THE RIGHT THING

Our trend-forecasting theme this year is “what matters most” — and it’s hard to think of what could matter more than simply doing the right thing. To call this a trend might be a misnomer — doing the right thing is always “on trend” — but it’s certainly in the spotlight, as accountability and brand equity are more interconnected than ever.

[As noted in Forbes](#), two misconceptions frequently attend this concept: first, that this is nothing new; and second, that it’s a youth movement. Neither is accurate. While values have, of course, always been important, consumers today have an unprecedented ability to seek, discuss, and share information, and to push for change. And second, while younger consumers are indeed often idealistic, this isn’t a Gen-Z issue: [research shows](#) that Millennials and Boomers are increasingly likely to consider company values before making purchase decisions.

“Patient-centricity” was a hot topic a decade ago, and “customer experience” has more recently taken its place. But as an industry, we’re realizing we need to be much more specific than offering these vague terms about doing good. We need to move with purpose in order to address the needs of the humans who take and prescribe and work with our products. We need to see the societal gaps that are failing them and move to do our best to correct them.

Technology has the potential to help us rectify some of these problems, but it’s only as good as the imperfect human information and assumptions that go into its sensors, models, and algorithms. If we’re not working with a constant, thoughtful effort to be socially conscious, our work won’t be successful.

From truly effective clinical trials, to human-centered design in communities, I’m glad to see diversity and inclusion properly in the spotlight in presentations at the upcoming South by Southwest conference.

– Joe Doyle, SVP, Strategic Marketing and Development, Intouch B2D

Consumers want to know that major brands care about the world, care about people, and care about their imprint on all of it.

– Brent Scholz, SVP, Executive Creative Director, Intouch Solutions

TAKE ACTION

Ensuring accessibility and inclusivity; acknowledging and remedying the implicit bias in our assumptions, and therefore, in our tools and technologies: these are vital tasks, not pleasant add-ons. And their effects are going to be watched.



**DIVERSITY OF EXPERIENCE LEADS
TO DIVERSITY OF THOUGHT.**





85% OF WOMEN SAY THAT ADVERTISING NEEDS TO CATCH UP IN ITS DEPICTION OF THEM.

Audiences are alert to woke-washing (campaigns that don't result in real action).

- The 2019 winner of the Cannes Lions Grand Prix for Health and Wellness was “ThisAbles,” a set of 3D-printable product adaptors for Ikea customers with disabilities — and it was conceived by McCann Tel Aviv copywriter Eldar Yusupov, who has cerebral palsy. Diversity of experience leads to diversity of thought. How can you do better to involve the best, widest-ranging set of minds?
- The 1982 Tylenol contamination PR case study is a classic. Then, Johnson & Johnson was lauded for their rapid action in the interest of public safety. But today we see very different headlines about the same company and concerns about baby powder and opioids. What does this tell us about how public expectations — and corporate responses — have changed? Do you have scenario plans in place to ensure that your brand will know how to respond in a crisis?
- Some 85% of women [say](#) that advertising needs to catch up in its depiction of them. However, ironically, women

[control](#) the same percentage — 85% — of all purchasing decisions. Depicting our world more accurately isn't just the right thing to do: it's the only logical business decision to make.



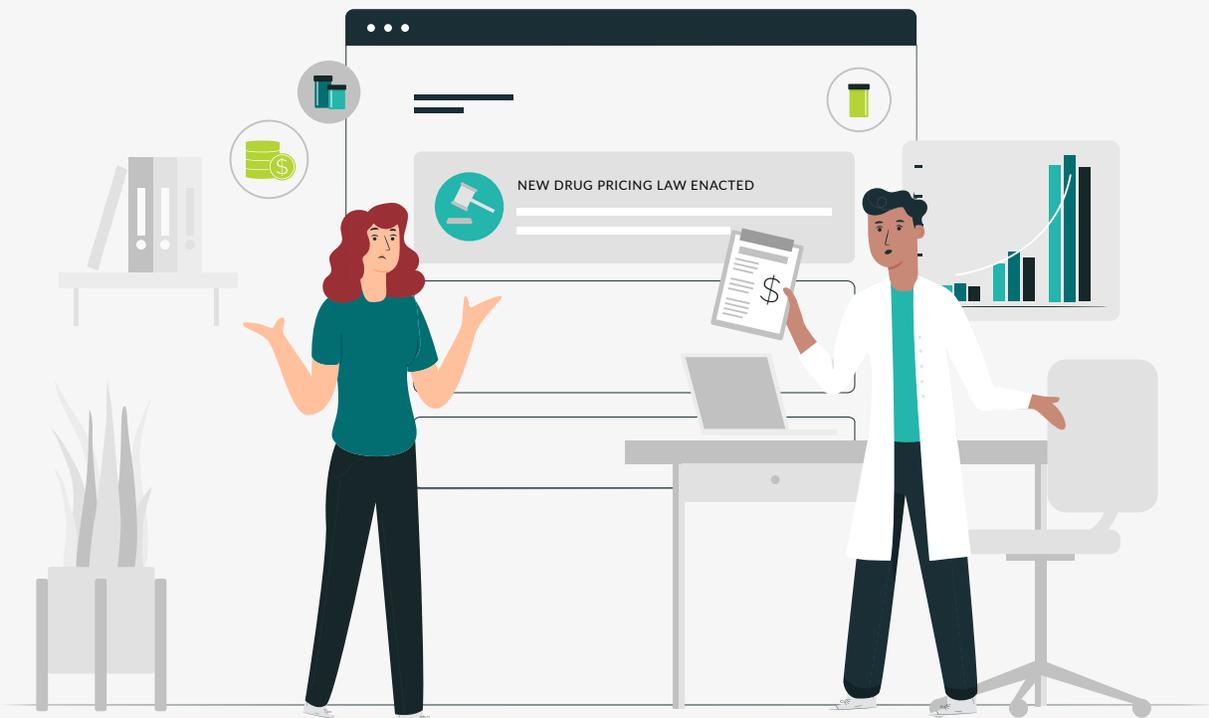
[READ MORE](#)

- [Diversity and Inclusion – Is Your Brand Doing It Right?](#)
- [US Government Reasserts Commitment to Ensuring Accessible Websites](#)



02.

EVERYTHING IS POLITICS





FROM SOCIAL ISSUES TO POLICY ISSUES, HEALTHCARE IS GOING TO BE INEXTRICABLY TIED UP IN AMERICAN — AND BRITISH — POLITICS.

02. EVERYTHING IS POLITICS

Pricing, access, social issues, and more ... 2020's election might be a year away, but one thing is for certain: it's going to keep pharma in the headlines.

In any election year, it's hard to avoid the politicization of, well, just about everything. In the upcoming U.S. election year, with impeachment proceedings underway and an emotionally fractured electorate unseen in recent history, that politicization is going to be amplified. And that means the corresponding headlines will be amplified, too. From social issues to policy issues, healthcare is going to be inextricably tied up in American — and British — politics.

Industry pundits widely agree that pharma is in the [“hot seat”](#) this year. The president himself [has speculated](#) that the pharmaceutical industry might be pushing his impeachment. The pricing of, and access to, American healthcare, is going to be a key issue in this election year — the defining issue, [say](#) some.

Moreover, political churn has increased in recent years, and turbulence is rarely conducive to smooth sailing. In the past four years, we have seen five different FDA commissioners in what's been [called](#) the “rotating commissioner’s chair.”

All trends are affected by the political climate, to a greater or lesser extent.

– Joe Doyle, SVP, Strategic Marketing and Development, Intouch B2D

The ever-changing landscape makes reimbursements, copays, etc., continually confusing to patients, office staff, and providers. Investment in access portals will continue to be a must-have for pharma in 2020.

– Vicky Cory, VP, Client Services, Intouch Solutions

TAKE ACTION

We can't calm all the storms at sea, but we can batten down the hatches for the wild ride ahead. Do you feel prepared for what 2020 might throw at you and your brand?

- What issues do you have with your product pricing and what proactive work is underway to address them? What efforts do you have in place to clarify access and coverage for patients? Are you at least making pricing and discount information accessible to patients?
- What government-driven issues threaten to disrupt your business ... and do you have contingency plans at the ready?
- What media crisis plans would help you sleep better at night ... and why don't you have them?



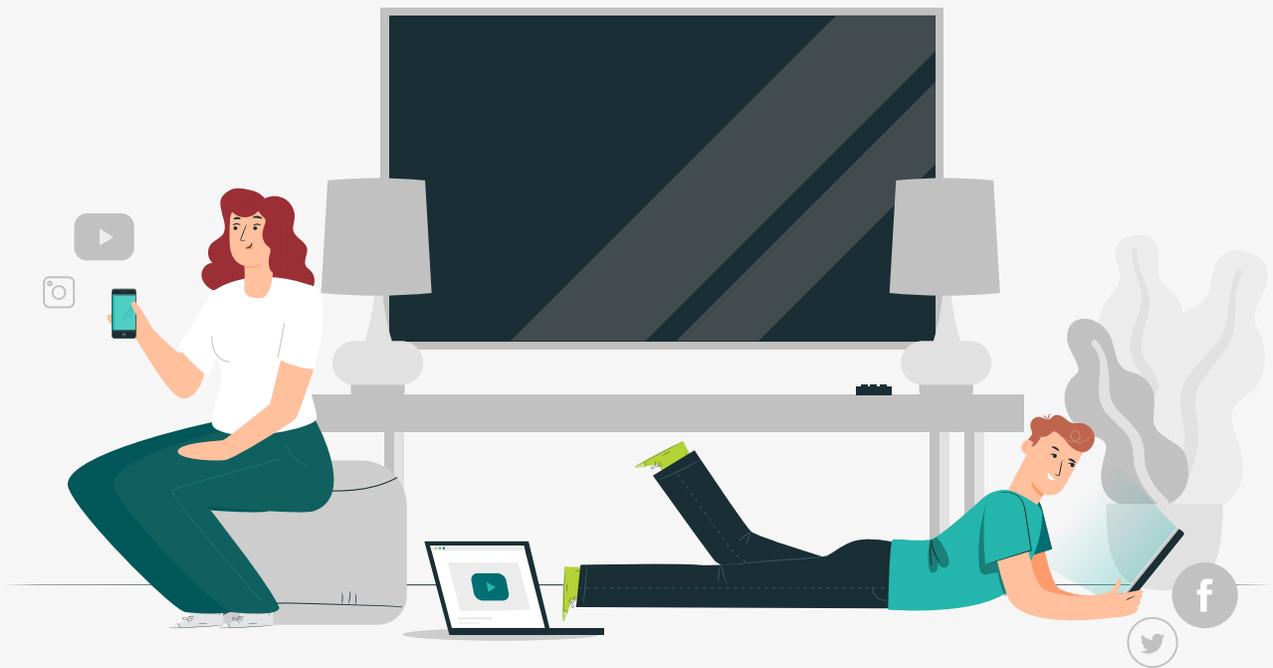
READ MORE

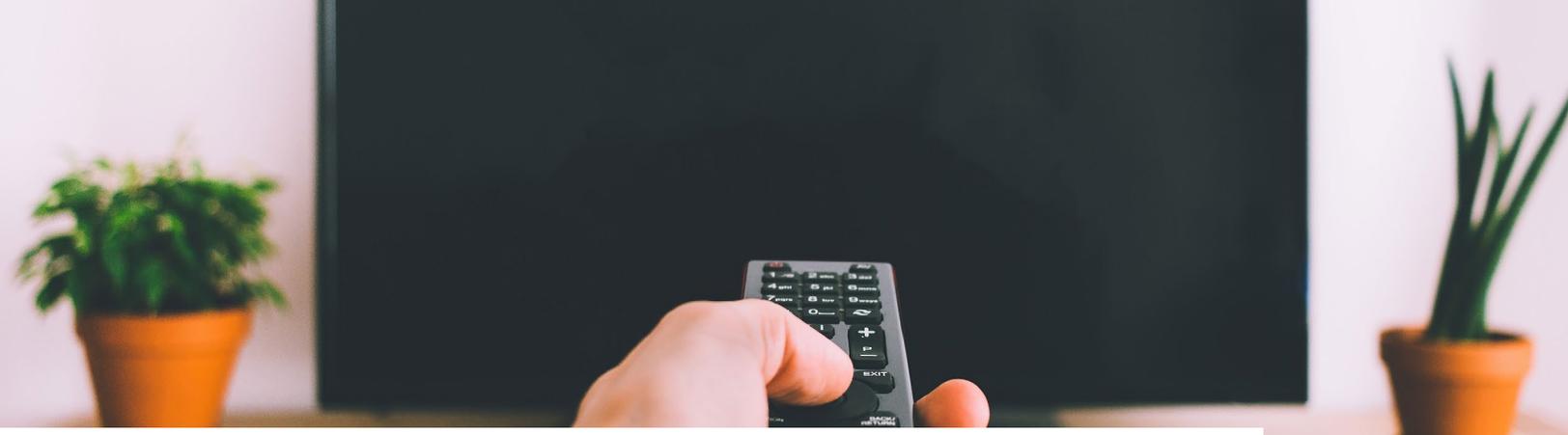
- [Five Issues in Washington for Pharma to Watch](#)



03.

TV IS DEAD, LONG LIVE TV





2019 WAS THE FIRST YEAR IN WHICH AMERICAN ADULTS SPENT MORE TIME ON THEIR PHONES THAN WATCHING TV.

03. TV IS DEAD, LONG LIVE TV

Nationwide, broadcast, one-size-fits-all TV commercials were once the default options for advertisers interested in using TV to reach their audience. But today? Well, they might still be a good bet during the Super Bowl. The other 364.9 days of the year, though, we want customization — as advertisers, but also as consumers.

Television occupies a different place in our world, and is experienced differently than in the past. The experience as a whole bears little resemblance, in many ways, to the broadcast or even cable experience of 20th century TV. 2019 was the first year in which American adults spent more time on their phones than watching TV: an [average](#) of more than 3.5 hours a day. And even when we do watch television, it's not the stationary, one-screen experience of days past. If we're not actually watching it on our phones, we often also have our phones in hand.

The 2010s has seen the decline of declamatory, broadcast advertising pushed to a mass public. In its place, we see the increasing importance of personally relevant advertising powered by marketing automation.

With the popularity of DVRs, Netflix, and other viewing models that make it easy for consumers to sidestep ads, a DTC TV placement is not the panacea it once might have been ...

Traditional TV is gone.

– Molly Buczynski, SVP, Client Partner, Intouch Solutions

For some clients and categories, the price of entry for TV media buys can be \$30M and above. They're constantly being challenged to find cost-effective alternatives to target their audiences due to budget constraints.

– Mark Arnold, SVP, Acct. Service Managing Director, Intouch Proto

TAKE ACTION

To be clear, TV is not dead. But it might be time to expand your definition of what TV advertising might look like, and what a campaign including it might also



involve. The possibilities of placing a TV ad are still there – in fact, they might be better than ever.

- Consider shooting a commercial in a number of lengths and formats and finding alternative placement opportunities for it, including digital, YouTube, Hulu, or hyper-targeted TV buys.
- Consider how AI-powered marketing automation could be helping you make better decisions.
- Work with experts who will ensure that the ways in which you target and personalize your campaigns remain compliant and responsible.
- Beyond live TV, consider livestreams – as TV watching declines, livestream watching increases across platforms like YouTube, Instagram, and Facebook.

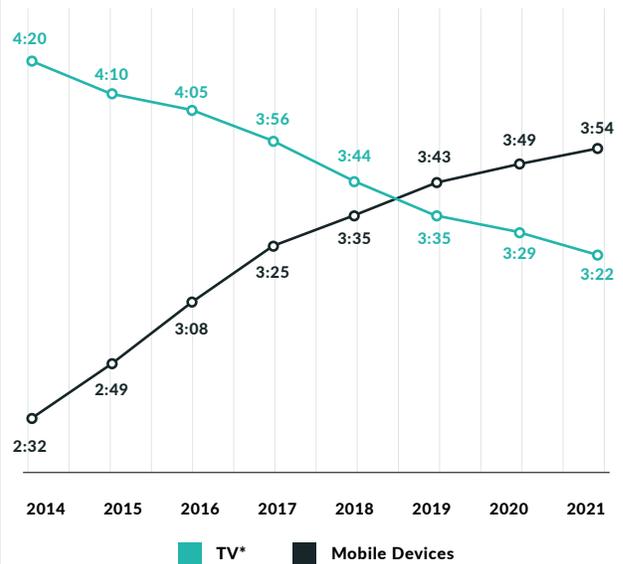


[READ MORE](#)

- [If Your Brand Doesn't Have a YouTube Channel, Why Not?](#)

TV AND MOBILE DEVICES: AVERAGE TIME SPENT IN THE US, 2014-2021

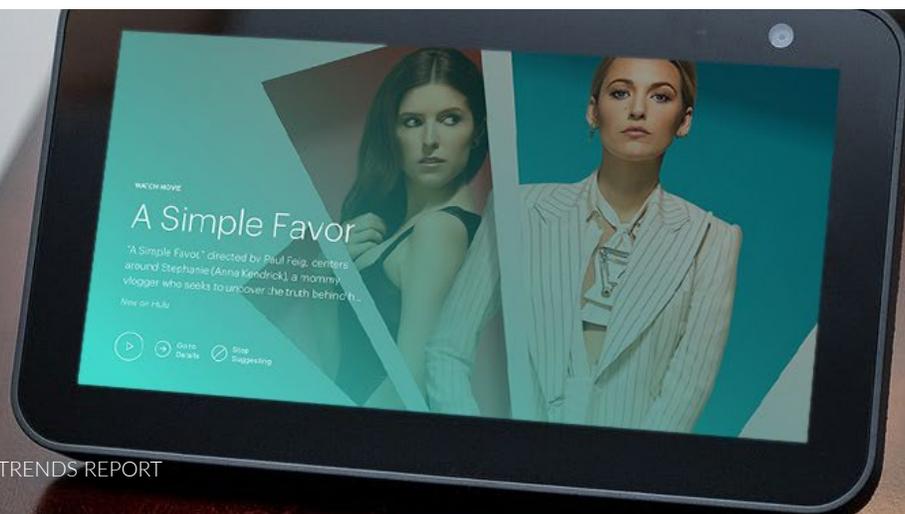
Hours Per Day Among Population



Note: Ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop; *excludes digital

Source: eMarketer, April 2019

CONSIDER SHOOTING A COMMERCIAL FOR YOUTUBE OR HULU.



04.

GETTING PERSONAL WITH DATA PRIVACY



04. GETTING PERSONAL WITH DATA PRIVACY

Statistics on the amount of data, and personal data, in existence are outdated by the time they're published, but with [more than](#) 2.5 quintillion bytes of data generated daily, we're creating more than we can imagine with literally every heartbeat.

Big Data has gone from a pipe dream, to a tech buzzword, to an issue of practical logistics. It's remained one of our trends to watch throughout its iterations because of its absolutely vital role in any brand's success.

Genetic analysis has gone from a moonshot to a stocking stuffer. Technology has evolved to track, measure, and store audience behavior data to make marketers infinitely more efficient, but companies like Google and Apple are implementing ways to allow users to clear cookies while preserving logins and settings, which may be a setback for marketers of all stripes. Data breaches that expose the confidential information of millions are, while thankfully not regular occurrence, not unheard of.

Despite it all, we're still willing to share. The average consumer is comfortable with their data being shared, even when they know it's offered to advertisers – and even when they're aware of major data breaches that seem to happen weekly, if not daily. Recent [research](#) published in *Business Insider* notes that the majority of consumers are amenable to sharing more information if it could benefit them by giving them discounts, better services, or helpful information.

As the saying goes, with great power comes great responsibility. Never in human history have we faced responsibility for this quantity of deeply personal information, to store it safely, or to erase it appropriately. We must understand how to learn from it and safeguard it.

Every company wants to say they have the key to the data story, but few can really do it correctly.

– Vicky Cory, VP, Client Services, Intouch Solutions

TAKE ACTION

As data-privacy regulations mount around the world, notably in the EU and California, the path to remaining compliant

grows harder to navigate. Simultaneously, most companies' internal processes are growing increasingly complex, as partner organizations, agencies, and vendors assist in the processing of all of that data and in complying with the labyrinth of laws.

With the complexity growing internally and externally, questions like these are more important than ever to answer:

- Do you know what's being done with all of the data entrusted to your brand?
- Do you know if you're making the most sense of it?
- Do you feel confident in how it's being protected? By your company? By your agency partners?
- Do your teams have a replacement plan for the demise of activity tracking via cookie?

ARE YOU CONCERNED ABOUT DATA PRIVACY?					
	Gen Z	Millennials	Gen X	Baby Boomers	Average
Not Concerned	9%	9%	6%	2%	6%
Slightly Concerned	20%	25%	20%	16%	20%
Neutral	18%	16%	12%	8%	14%
Somewhat Concerned	25%	22%	28%	26%	25%
Very Concerned	28%	29%	35%	47%	35%

2019 Privacy Survey by Factual



READ MORE

- [California's New Data Privacy Law: New Thinking on Its Implications for Pharma](#)
- [Intouch Takes Data Security to the Next Level With Two New, Highly Regarded Credentials](#)



05.

THINK BETTER, NOT JUST BIGGER



05. THINK BETTER, NOT JUST BIGGER

As marketers, we all appreciate a pithy phrase, a big idea, or a novel piece of technology. But sometimes it can be easy to let alluring ideas move you away from our theme this year: what matters most.

Big ideas are alluring. Shiny objects are tempting. And sometimes, it really is time to completely flip the script. But often, it's better to practice caution before you throw the baby out with the bathwater.

More often, what really needs to happen is ... to just figure out how to do what you're doing a little bit better. That's a lot less sexy. It makes fewer headlines. But it can make a world of difference for your brand – and, more importantly, for your patients – with a minimum of investment and time.

Focus on the customer and their experience, not on novelty for novelty's sake. Learn from your data and optimize everything you're doing. If it's not being measured, consider carefully if it's even needed. (And if it's not being measured: why not? If it's a deliberate choice, that's fine, but if measurement hasn't been considered ... consider it.)

Employ the most cutting-edge approaches at your disposal, of course: but use them with a goal in mind, not for their own sake.

I've been through with the term 'disruptive' for quite some time! I understand the original premise behind the thinking, but I feel the word has morphed into a wild dog: running off leash, barking like crazy, causing everyone to chase it. I feel it actually steers work the wrong way to a degree. People focus on 'standing out' and 'breaking status quo' and 'zigging when others zag' rather than the problem we're trying to solve. It invites 'technology for the sake of technology' thinking. And at the end of the day, people don't want their lives disrupted. They want them a little bit easier, more manageable, less chaotic – they want their lives better.

– Brent Scholz, SVP, Executive Creative Director, Intouch Solutions

ARTIFICIAL INTELLIGENCE IN PHARMA SALES & MARKETING

PRACTICAL OPPORTUNITIES FOR IMPLEMENTATION





TAKE A HARD LOOK AT HOW YOUR TACTICS ARE PERFORMING AND CONSIDER HOW YOU CAN ADJUST THEM.

TAKE ACTION

Rather than assuming that system-wide implementation of something big and new is the only way to advance, consider practical ways to make a difference fast for your patients. Take a hard look at how your tactics are performing, and consider how you can adjust them to reach their intended success points more efficiently. This could involve tweaks as small as changes in scheduling. Or it could involve updating your processes to get better results faster.

And even technology doesn't have to come in enormous doses or not at all. Off-the-shelf, AI-powered solutions can help you make the most of your information, your teams, and their time — from helping you uncover new insights about your patients, to triaging work more efficiently.

HCPs have their own lexicon and nuances of communication. Cracking that 'code' can give reps smarter and more precise talking points for increasingly briefer interactions.

– Justin Chase, EVP, Innovation and Media, Intouch Group,
[at the PoC3 Summit.](#)



READ MORE

- [DPE 2019: Trends and Takeaways Worth Waiting For](#)
- [Why AI Should Be a Pharma Marketer's Best Friend](#)





CONCLUSION

We believe these trends are “what matters most” for 2020: the forces in society, medicine, and technology — as well as in pharma marketing specifically — that will most affect our work in the year to come.

What it means to be a successful pharma marketer changes every year — but this year, the changes are seismic.

Old standbys, like traditional broadcast TV, are extinct. A good marketer must know the new landscape that’s arisen. Considerations that were once assignments for special departments, like government affairs, privacy, or corporate responsibility, are part of everyday business conversations — or, at least, the good ones. And the old-fashioned fallback of crossing your fingers for a new “big idea” to save you ... isn’t a great plan after all.

What is a great plan? An impeccable understanding of the latest nuances of privacy, transparency, politics, and digital media — and the ability to use that understanding to make constant incremental change that makes your patients’ lives better.

What do you think? We’d love to hear your thoughts.

Contact your Intouch team to discuss how any or all of these trends can be put to work for your brands in the coming year. You can also contact any of our chief contributors, listed to the right.

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