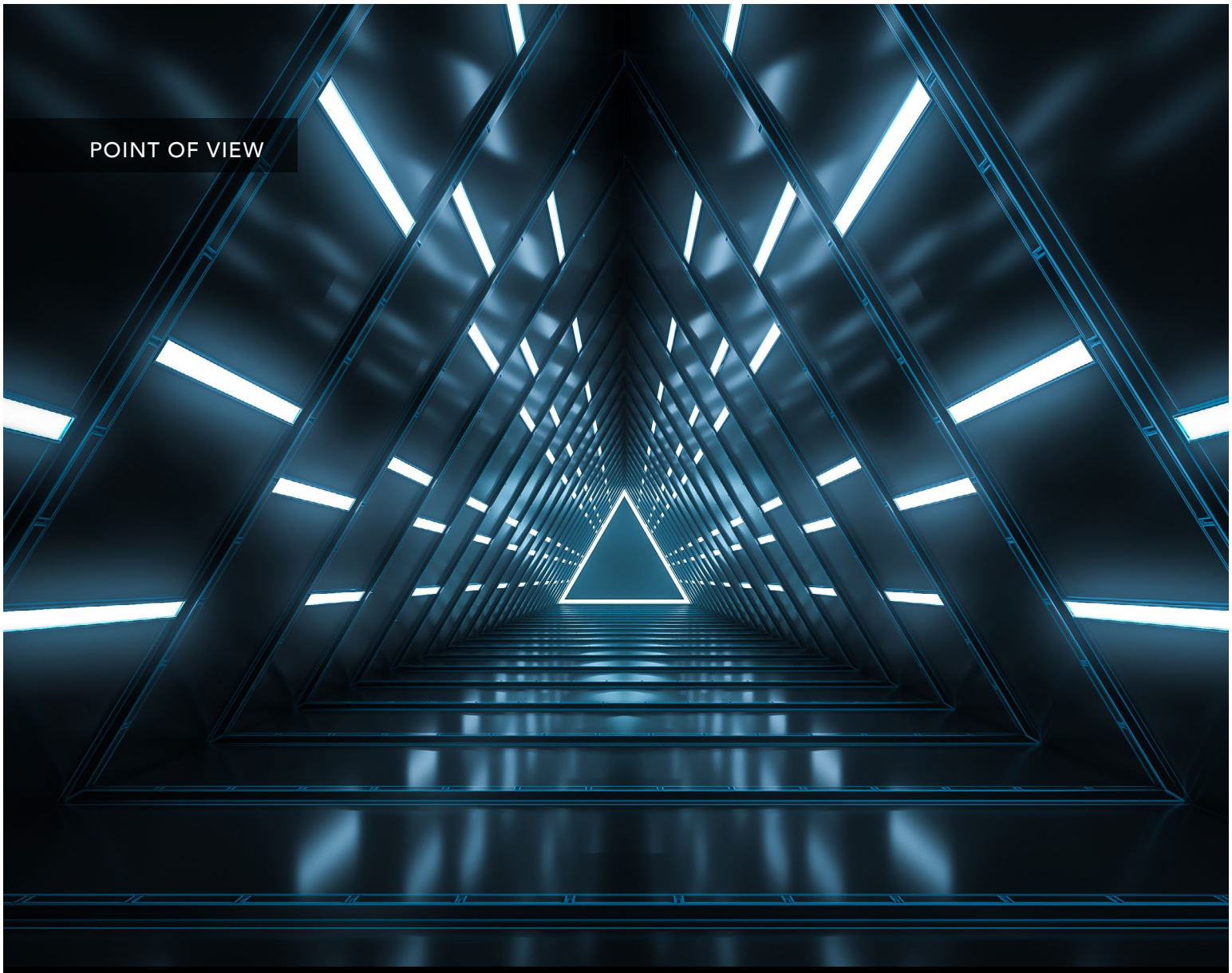

POINT OF VIEW

EVERSANA INTOUCH

WHAT MATTERS MOST: THE TRENDS THAT WILL SHAPE PHARMA MARKETING IN 2023

eversanaintouch.com

November 2022

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

Executive Summary

Big concepts. Big platforms. Big words. Big decisions.

It's easy to be provocative, to hype, to make unsupported claims.

It's far more difficult to be precise, accurate, meaningful. To have impact. To do good work that matters.

In our eighth annual trends forecast, we look at five big ideas we believe are referenced too flippantly too often, and not given the attention and action they deserve.

We believe that what matters most in 2023 is addressing these five issues meaningfully.

Trends for 2023

01	OMNICHANNEL
02	ECONOMY
03	METAVERSE
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Introduction

Each year, we develop a forecast of the trends that we believe will matter most to our clients in the year ahead. We begin by gathering the thoughts of several dozen leaders throughout the agency. We've been doing this since 2015.

For the first time this year, that process was a little different – because this was, of course, the first full year our agency was part of EVERSANA. So this year, we had even more industry leaders, with broader areas of expertise, from right inside our "walls". And that's exactly why I decided to join forces with EVERSANA: to get increased insight into the most important challenges, and increased ability to solve them.

This year, we're looking at five big ideas, chosen because we see them being taken too lightly too often.

(We've got plenty more – check **our agency blog** as we continue to discuss pressing issues and what you need to know and do! But these were the ones that kept arising across our discussions.)

Not taking these trends seriously enough might look like a lot of different things: inaccurately oversimplifying a concept, insisting a problem's been solved before it has, or ignoring a slow-growing elephant in the room.

But in whatever way these big concepts aren't being treated properly, the result is the same: it's not good for patients.

It's hard work to give them their due. These are big issues, and they can be daunting. But we've always believed there's no challenge too big to cure.

We call ourselves the "nextmakers" because we work to understand our clients' next challenges and find the right approaches for them – in some cases, before they even know they need them. To do that, you can't be afraid to look ahead and take big ideas head-on.

I hope you'll join us at EVERSANA INTOUCH and at EVERSANA, in looking ahead, both here and in the year to come.

Be well,

Faruk Capan, CEO, EVERSANA INTOUCH and CIO, EVERSANA

01.

OMNICHANNEL

ABOUT THE ISSUE

It isn't often that one of our annual themes seems to include all the others, but that's the case this year.

Pharma has taken it slow – a theme in our digital evolution, as you'll read about in the **Metaverse section** – but we're finally maturing enough to be able to fully answer the promise of "right message, right place, right time" that you've heard chanted for a decade. That's omnichannel.

"A personalized customer experience is table stakes now," as Susan Perlbachs, Chief Creative Officer, EVERSANA INTOUCH put it. And Mike Motto, SVP, Market Access, EVERSANA INTOUCH Engage, agreed: "HCPs have become accustomed to hybrid models that offer on-demand resources and information."

Today, each of us live in an increasingly omnichannel world. Pharma's need to catch up to most other industries (shopping, entertainment, travel, education) is only growing – the need for, as Tracy Kossler, SVP, CX Strategy, EVERSANA INTOUCH, put it: "personalized, dynamic experiences, powered by collected, synthesized data, and automated by advanced technology."

Omnichannel is more than removing data siloes; it's putting that data to work. As Susan said, "The left hand doesn't just have to know what the right hand is doing: It has to inform the right hand what needs to be done next."

"By delivering impactful experiences that provide clear benefit to customers, pharma can move towards their own data flywheel where customers engage more and offer more insights that, combined with AI, power even better personalization and experiences the next time," said Scott Snyder, Chief Digital Officer, EVERSANA.

"Activating omnichannel is not just about connecting field and marketing data," said Bill O'Bryon, SVP, Omnichannel Activation, EVERSANA INTOUCH B2D. "It's a mindset for changing the way we engage with all our audiences across the enterprise to address them as individuals with specific priorities, needs, and preferences; to anticipate them where possible; and, ultimately, to improve outcomes for patients and increase efficiency for our partners."

Patients and HCPs expect anticipatory relevance. They know that it's possible to get exactly the information that will help them most. And if pharma can't do that for them, as Nathan Stewart, SVP, Content Strategy & SEO, EVERSANA INTOUCH, noted, "Amazon, Facebook, Google, etc. are looking to move in on tech-savvy patients and HCPs."

> *At this point it's a matter of 'where' and 'how' for marketers. It's no longer a matter of 'when.'*
>
> – Jeff Greene, SVP, Strategic Planning, EVERSANA INTOUCH

WHERE TO BEGIN IMPROVING YOUR OMNICHANNEL CAPABILITIES? START WITH OUR ASSESSMENT.

This catch-up work has put a focus on the industry's need to answer concerns about customer data consent and privacy. As Paul Pierce, SVP, Professional Services, EVERSANA INTOUCH B2D, has said, "A lot of discussions – and some change – have happened, and the industry has seen a proliferation of regulatory policies – and some penalties – but more remains to be done."

TAKING ACTION

Often, the question brands have is where to begin improving their omnichannel capabilities.

We've got a plan to answer that: a formula for figuring out what phase you're in, breaking down and prioritizing what you need to do to evolve. Talk to your EVERSANA INTOUCH team to get your own assessment, applying our proven formula to give you your own prioritized action list!

> *The need for personalized, dynamic experiences powered by collected, synthesized data and automated by advanced technology will continue to increase in 2023.*
>
> –Tracy Kossler, SVP, CX Strategy, EVERSANA INTOUCH

Frequently, though, the most impactful action a brand can take to increase their omnichannel power is to begin by improving internal connections. (And then, as Susan noted above, you can begin to use that interconnected data to make predictions.) Here are two areas in which you may have hidden data siloes:

> *A brand's ability to rise to the ever-growing need for personalization depends on the team's agility in the adoption of technology and its efficiency in business transformation.*
>
> – David Windhausen, EVP, EVERSANA INTOUCH & President, EVERSANA INTOUCH B2D

Telehealth: "All brands should be considering how to not only leverage telehealth, but effectively integrate it into their DTC / omnichannel plans and use the invaluable data this integration provides. Just plopping the service on your site, or linking patients to it, isn't it."
– Kelly McCoy, SVP, Managing Director, Head of EVERSANA INTOUCH Solutions

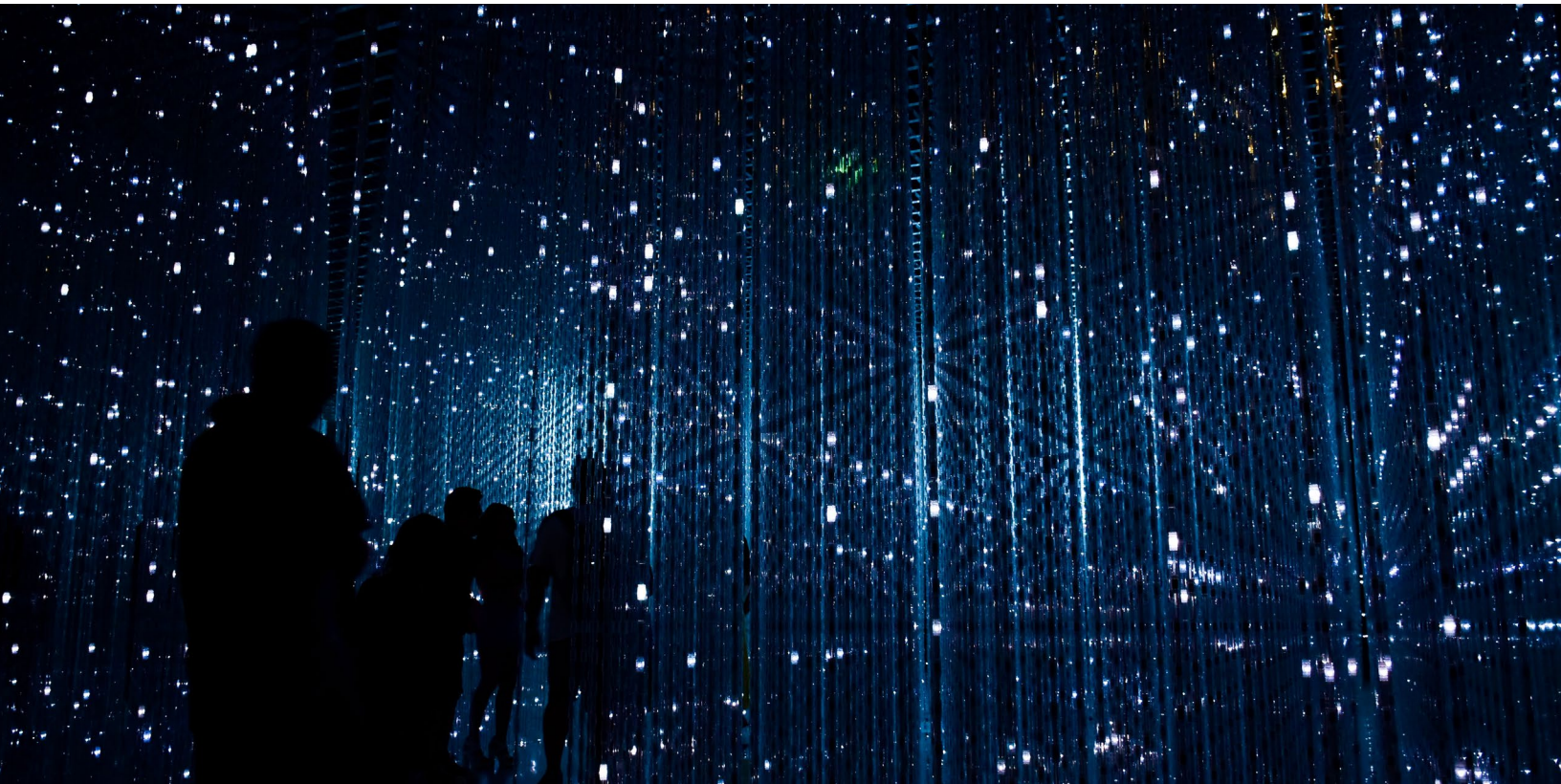
Patient services: "Brands need to extend their omnichannel experience to patient services and integrate the insights from these interactions with both HCPs and patients back into their upstream engagement strategies." – Scott Snyder

Across the board, though, be sure to lead with the need before anything else. As Sean Rapson, Managing Director, EVERSANA MANAGEMENT CONSULTING, put it, "Despite huge gains from the shift from post-hoc to predictive analyses leveraging large datasets and machine learning, pharma marketing organizations still too often lead with tactics and work backwards to justify it, versus the other way around."

- Check out our **recent omnichannel webinar** with Salesforce to learn how to increase relevance in sales calls!
- For more on omnichannel and best practices for your specific situation, stay tuned for our upcoming whitepaper.

RECENT NEWS

- Overwhelmed by Omnichannel? We've Got Your Back
- Where Are You on the Path to Data-Driven Pharma Marketing?
- Want to Create Meaningful Customer Experiences? Let Data Drive



02.

ECONOMY

ECONOMIC VOLATILITY MEANS THE RIGHT BUDGET CHOICES ARE VITAL.

ABOUT THE ISSUE

How will inflation affect organizations and consumers in 2023? Will the fears of a recession come to pass? Depending on the headline, pundit, or statistic, it can be hard to tell – probably because it's hard to tell for the experts and even for the guiding bodies who have been doing their best to predict the unpredictable last few years.

The uncertainty lies partly in the terminology of economics, partly in the process of "declaring" such events, and partly in the circumstances.

In any case, experts agree: our economic situation warrants caution.

"The coming year will see contracted budgets and an emphasis on value," agrees Jacquie Morgan, SVP, Enterprise Transformation, EVERSANA INTOUCH B2D. "Clients will be scaling back on initiatives and looking with a discerning eye on return on investment and the ability to deliver scale, value, and efficiency to their business."

This caution will show up everywhere in life sciences: from organizations changing staffing and program investments, to patients changing their behavior.

> *The coming year will see contracted budgets.*
>
> – Jacquie Morgan, SVP, Enterprise Transformation, EVERSANA INTOUCH B2D

This caution, however, may result in behavior that's counterproductive – cutting corners rather than working smarter.

"Macroeconomic financial pressures are driving a flight toward more core marketing needs with nearer-term bottom-line payoffs, at the expense of more transformative investments in marketing infrastructure and capability-building with longer-term returns. We're already seeing signals of this with record-breaking layoffs of pharma marketers," said Sean Rapson.

> *Investments in marketing infrastructure that will pay off for the pharma marketing organizations that have been making them or working with organizations that offer them.*
>
> – Sean Rapson, Managing Director, EVERSANA MANAGEMENT CONSULTING

TAKING ACTION

Hand-in-hand with the **Equity trend**, economic uncertainty will make life harder yet for patients and caregivers who are already facing financial difficulties.

"Addressing treatment affordability at the public health, payer, provider system, and patient levels is becoming increasingly important," said Ellen Cappellino, SVP, Market & Patient Access, EVERSANA COMPLETE Commercialization.

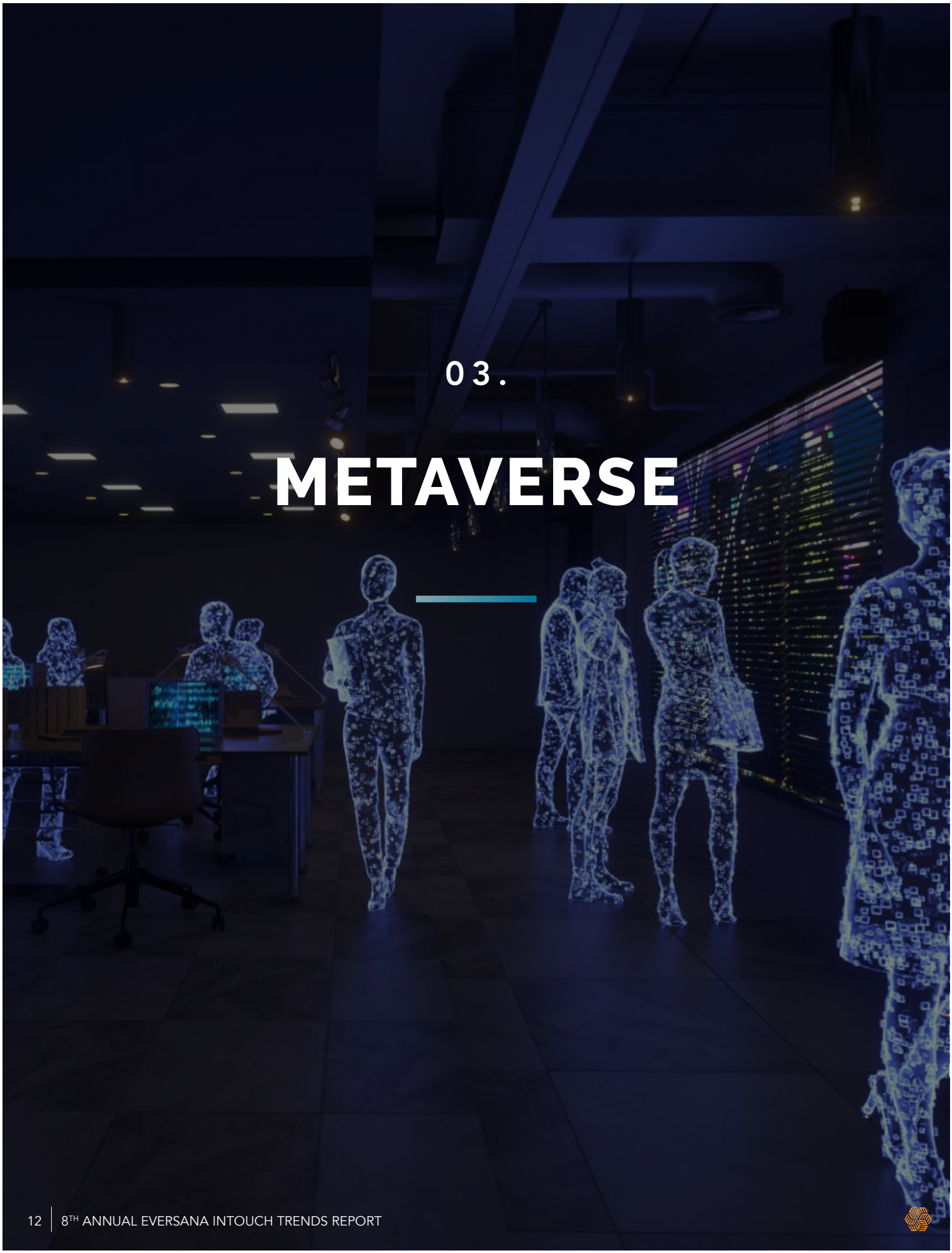
Efficiency is the watchword for those handling any economic fears, of course: make your investment do the most with the least. But what does that look like – and more to the point, what should it look like? That can be harder to tell.

To avoid being penny-wise and pound-foolish means knowing what the right expenses are.

"Paradoxically, it's exactly the investments in infrastructure like data platforms, analytics capabilities, customer insights, and omnichannel infrastructure that will pay off for the pharma marketing organizations that have been making those investments, or that are closely partnering with organizations that offer these capabilities in an end-to-end manner," said Sean Rapson.

UPCOMING NEWS

For a detailed investigation into what current economic uncertainty looks like for pharma marketers – a prospective look at the impact on patients, and practical strategy recommendations to address the situation – stay tuned for our upcoming whitepaper on this topic, including new first-person research and expert interviews.



03.

METAVERSE

THE MEDICAL METAVERSE IS TAKING SHAPE IN EDUCATION, DIAGNOSTICS, TREATMENTS, THERAPEUTICS, TELEHEALTH AND MORE.

ABOUT THE ISSUE

The word "metaverse" has been the victim of hype, conjuring up fanciful connotations of life as an avatar in a virtual world. The reality might be a little less sci-fi, but it's a lot more practical. We'd argue that a lot of terms that are often taken more seriously – like digital medicine, digital therapeutics, and telehealth - count as part of the medical metaverse, too.

"Mark Zuckerberg's clunky vision for the metaverse is getting panned equally on Main Street and Wall Street, but if you know where to look, you can see metaverse disruptors chipping away at the edges of our current healthcare reality, blending our virtual and real lives together to change the shape of medicine," said Jeff Greene.

We see the medical metaverse taking shape for HCPs in education, in diagnostics, and in treatments and therapeutics. And we see it for patients in telehealth and patient support.

"The ability of virtual and augmented reality to create experiences and therapies that can heal and treat is just starting to emerge," said Nathan Stewart, SVP, Content Strategy & SEO, EVERSANA INTOUCH. "We're already seeing applications in ADHD, Alzheimer's, and depression. Technology can be just as much a part of a treatment regimen as the chemistry of a pill, and this has big implications for what kind of organizations join the 'pharma' or 'healthcare' space. We expect to see more conditions treated with tech solutions, and even more big players moving into the space."

> *A brand's ability to rise to the ever-growing need for personalization depends on the team's agility in the adoption of technology and its efficiency in business transformation.*
>
> – Jeff Greene, SVP, Strategic Planning, EVERSANA INTOUCH

TAKING ACTION

You might remember the hesitancy of the late 1990s, when pharma eventually came to grips with the internet and the idea of brand.com websites – and the hesitancy of the late 2000s, when the industry slowly tiptoed into social media and interactivity. Web 3.0 in the 2020s

is no different. Digital evolution continues in every generation. Wise marketers will know not to be caught off guard, and not to lag behind customer expectations.

Consider where your blind spots might be. "Pharma marketers in 2023 need to think about how digital therapeutics fit into their patient journey, and how they help with challenges from diagnosis to treatment to adherence," said Maneesh Gupta, Managing Director, EVERSANA MANAGEMENT CONSULTING.

And consider who might be sneaking up on you, and where. "It's time to be assessing competitive threats from metaverse innovators entering our sphere from the tech world," said Jeff Greene. "Brand managers can get ahead of this trend by working with experts to educate themselves about the medical metaverse and how their key customers can benefit from these technologies. It's especially important in categories that seem to be adopting metaverse early, such as mental health (PTSD, anxiety, depression), neurology (ADHD, MS, pain management), and procedure-driven specialties like surgery."

"Pharma commercial leaders need to evaluate potential synergies and partnerships with digital therapeutics, especially in chronic conditions. This can help them better engage patients, providers, and payers and drive better health outcomes," agreed Martin Culjat, SVP, Global Head of Digital Medicine & Regulatory Innovation, EVERSANA.

Digital therapeutics mean technology, not chemistry, may heal us.

– Nathan Stewart, SVP, Content Strategy & SEO, EVERSANA INTOUCH

RECENT NEWS

We release a monthly digest of medical metaverse news. Check the EVERSANA INTOUCH Monthly Medical Metaverse Digests from **October**, **September**, **August**, **July**, **June**.

MEDICAL METAVERSE EXAMPLES

1. A noninvasive wearable diagnostic device to treat diabetes (Nemaura, an EVERSANA partner)

NEMAURA MEDICAL

2. Immersive physician and surgeon training (Osso VR) and metaverse clinics and hospitals (Latus Health)

OSSO VR

3. Digital therapeutics delivering treatment via wearables (NightWare) and VR/AR devices (BehaVR)

NightWare™ BEHAVR

4. Music therapy (rhythmic auditory stimulation) to improve walking speed and ambulation in adults with chronic stroke walking deficits (Medrhythms, an EVERSANA partner)

MEDRhythms

5. Real-time vein visualization mapped onto a patient's arm to assist in IVs and blood draws (AccuVein)

AccuVein®

6. Prescription video-game treatment to improve attention function in 8-12-year-old children diagnosed with ADHD (Akili)

AKILI

7. The use of "digital twins" to pre-plan procedures (Dassault's Living Heart) or prevent future health issues (Babylon Health's Healthcheck)

babylon

8. Patient support groups in the metaverse (Narcotics Anonymous)

9. Digital therapeutics to improve quality of life and reduce stress, anxiety, and depression symptoms related to cancer (Prosoma, an EVERSANA partner)

prosoma DIGITAL THERAPEUTICS

04.

EQUITY

YOU CAN'T SUCCEED WITHOUT UNDERSTANDING AND ADDRESSING LONGSTANDING EQUITY GAPS.

ABOUT THE ISSUE

A trend isn't the same as a fad or a novelty, even though sometimes those words are used similarly. The former is a cultural movement, but the latter are transient.

In medical research, in healthcare delivery, and in life-sciences companies and their partners, responsible organizations are working to uncover and address entrenched inequities. They may be due to bias or geography, to ignorance or intent, but regardless, they need to be eliminated.

This need isn't a fad or a novelty. It's a powerfully relevant, wide-ranging, desperately needed area of focus. In medical education and in clinical trials, research has excluded women and other marginalized populations, deliberately, for generations. In care delivery, "The facts are staggering. Care is not equal for all. And we can't just keep talking about it. We need to take actions to change it," said Susan Perlbachs.

And in pharma marketing – as well as pharma generally, and marketing generally – as Kelly McCoy, SVP, Managing Director, Head of EVERSANA INTOUCH Solutions, put it, "The industries have talked a ton about DE&I, but in reality, we've seen little action."

In current work for an HIV brand, EVERSANA INTOUCH Proto has ensured that its efforts include people who are truly reflective of the patient population at every step, from ideation to creative to outreach. "When it comes to representation, authenticity matters, so it was really important to us to recruit from within the community," said Meg Holland, SVP, Client Services, EVERSANA INTOUCH Proto. "We wanted to ensure that the people who we were trying to help could see themselves in our outreach," said Charley Aldridge, VP, Group Creative Director, EVERSANA INTOUCH Proto.

"Digital solutions will also need to continue to be a part of the strategy to bring more participants to clinical trials as we strive to create a more equitable research landscape," said Liz Katta, Manager, Engagement, Clinical Trials, EVERSANA INTOUCH Engage. "Wearable and telehealth technologies can help engage individuals far away from a clinical trial and encourage participation, while digital and social content can increase awareness and education to meet diverse populations where they are and increase buy-in throughout the development process."

> *Care is not equal for all. And we can't just keep talking about it. We need to take actions to change it.*
>
> – Susan Perlbachs, Chief Creative Officer, EVERSANA INTOUCH

View Our Award-winning Erase The Line case study

TAKING ACTION

Marketers need to understand these historic and current gaps in equity – the presence of the gaps, as well as their extent and their causes – so our work can reflect that awareness and address those still-present needs.

"From the makeup of the teams leading marketing initiatives, to co-creating with the communities we serve, to understanding all patients' holistic experiences, all the way down to the data that creates our digital ecosystems and the process of building accessible brands from concept through execution – it all needs to be done," said Kelly McCoy. Data-driven digital technologies offer promise, both to better quantify the problem, as well as to advance our capabilities to overcome historic barriers. But even the best solutions can only work once the right people are in the right rooms having the right discussions.

"Now, more than ever, we're seeing the reality of inequality within our health services," said Nathan Stewart. "Access, outcomes, and representation all vary across race, sexual orientation, and gender. There is an ever-growing need for pharma to be a part of driving health equity. We at EVERSANA INTOUCH continue to develop deliverables and perspectives to inform our work, and improve our clients' content, so that it is relevant to and representative of everyone."

Patients are seeking care outside of the traditional HCP office or pharmacy with telehealth, at-home care, or concierge care. This will drive disruption and new approaches in demand generation, channel strategy, HCP marketing, and more.

– Maria Kirsch, General Manager, Patient Services, EVERSANA

"We're seeing increasing demand for our health equity services, which enable clients to see the blind spots in their own communications, prioritize where they need to act first, and most importantly credibly and confidently communicate to these marginalized communities," said Nicole McCann-Davis, Director, Strategic Planning, EVERSANA INTOUCH. "The net result is integrated communications plans that are, simultaneously, fully inclusive communications plans."

RECENT NEWS

- How Pharma Can Help Marginalized Patients Gain and Maintain Medication Access
- Take Out the Garbage: 4 Ways to Ensure Equity in Healthcare AI
- Helping Ensure Medication Adherence Among Marginalized Patients
- Algorithms and Equity: Banishing Bias in AI
- Finding Your Brand's Blind Spots With an Inclusivity Assessment
- Digital Accessibility: It's More Than Just a "Nice-to-Have"

05.

TALENT

TALENT MANAGEMENT TODAY MEANS ENGAGING, TRAINING, AND PROCESSING CHANGE.

ABOUT THE ISSUE

From patients' jobs, to healthcare systems, to pharma corporations, to agency life, and at every business in between, employment churn seems to be growing by the day.

Last year we heard of "The Great Resignation," and this year "Quick Quitting," but really, it all comes down to one word: talent.

It doesn't matter what structures, technology, or history a company has if it doesn't have the experienced, creative, engaged brilliance of its talent to bring them to bear in their work.

In the marketing world, we're seeing this hit hardest in terms of creativity. Brilliant ideas are always vital. But they are more difficult to arrive at via virtual work groups who may not have the same longevity focused on the same brand, or working on the same team. But creativity matters just as much everywhere else: when exploring new media channels, for instance, or when developing a plan that finds a way to meet increasing expectations for faster content cycles or more personalized journeys.

"Transformative companies largely consist of individuals who buy into their culture. Acquiring talent today takes a sales pitch; keeping talent requires much more," said Jesse Brown.

"In the 2020s, EVERSANA INTOUCH, like many employers, has benefited by geographically diversifying its talent base. In 2019, we had fewer than 20 employees who didn't live within a few hours of one of our offices. Today, we have nearly 400 – including about a dozen who are digital nomads, traveling as they work!

> "Talent management today – and in 2023 – will come down to three concepts," said Angela Tenuta, President, Full-Service Agencies, EVERSANA INTOUCH. "First, engagement. Second, training. And third, processing change."

"The corresponding challenge is to evolve our ways of collaborating, managing, and keeping our culture strong. While you can have a productive meeting in a room of 15 experts, virtual groups need to be smaller and more focused. And since managers can no longer use proximity to help them read the needs of their team members, we're helping them find new ways to support and develop the people that report to them. We're even testing new ways to celebrate. The big annual red-carpet parties that agencies are famous for do not carry the same value post-pandemic. We've been sponsoring more intimate gatherings where teams can break off and play together, get to know each other more organically.

"Bringing on 500+ people a year to our agency is another factor, of course. The future of our success lies in adding systematization and automation to our processes, we can't rely on organic learning. Employee #2000 needs to feel just as comfortable getting work done as employee #20.

> *Acquiring talent today takes a sales pitch; keeping talent requires much more.*
>
> – Jesse Brown, Associate Director, SEO, EVERSANA INTOUCH

"All of this is part of our agency evolution into the EVERSANA organization: bringing us the strength and wisdom of the entire commercialization life cycle, and offering our own expertise to fuel our new colleagues throughout that cycle."

TAKING ACTION

Shorter average tenures mean our clients may have less expertise and rely upon agency knowledge more than ever. Strong partnerships have never mattered more.

"The competition for talent has not only affected the agency world, but our clients as well," said Brian Poeschl, SVP, Client Services, EVERSANA INTOUCH Engage. "To retain promising talent, clients are promoting people sooner than in the past, so mid-level managers may not have the experience we expect. We are working harder than ever to help our clients fill experience gaps to support their success."

The training programs we have built for our teams are being made available to our client teams as well.

(Ask your EVERSANA INTOUCH team about the variety of services we offer our individual clients! There are many available to you, including **Playbook**, our monthly newsletter.)

RECENT NEWS

- **Be a Leader That Gets Star Employees to Stay**
- **Leading Your TEAMS: Making the Most of Multiple-Agency Collaborations**
- **Building Relationships in Hybrid Times**

CONCLUSION

Health is fundamental. It's what we care about for ourselves and our loved ones more than perhaps anything else. And so, the blessing and the curse of healthcare is a two-sided coin: We work in a field that matters perhaps more than any other. We have so much potential to make a difference; and we can fall so far short if we don't.

In pharma, and in healthcare, we're here to do the most we can to help human health. Quite a big mission. And so, we need these big words and big concepts that we've talked about here. And we need to take big action on them.

We must address these trends not only with conviction that we must make progress, but also with respect and with kindness for the hesitancy we see in our peers. Hesitance is a natural part of change. If the start of this decade hasn't made you more nervous, you're unusual. So we see the need not just to make change, but to find ways to do it while drawing along those who need encouragement.

Digital technology extends our capability to make those changes: to understand what patients need, to understand how we can help them, and to reach patients, caregivers, and HCPs with the information they need and want.

These five trends for 2023 are big issues. And we have so many more important issues at hand, of course, too, now and to come. Addressing big issues fully and thoughtfully isn't the work of 12 months. It's the work of a lifetime. It's the work I and my EVERSANA INTOUCH colleagues are devoted to alongside you.

Thank you for reading. Let's get back to work.

Faruk Capan, CEO, EVERSANA INTOUCH
and CIO, EVERSANA

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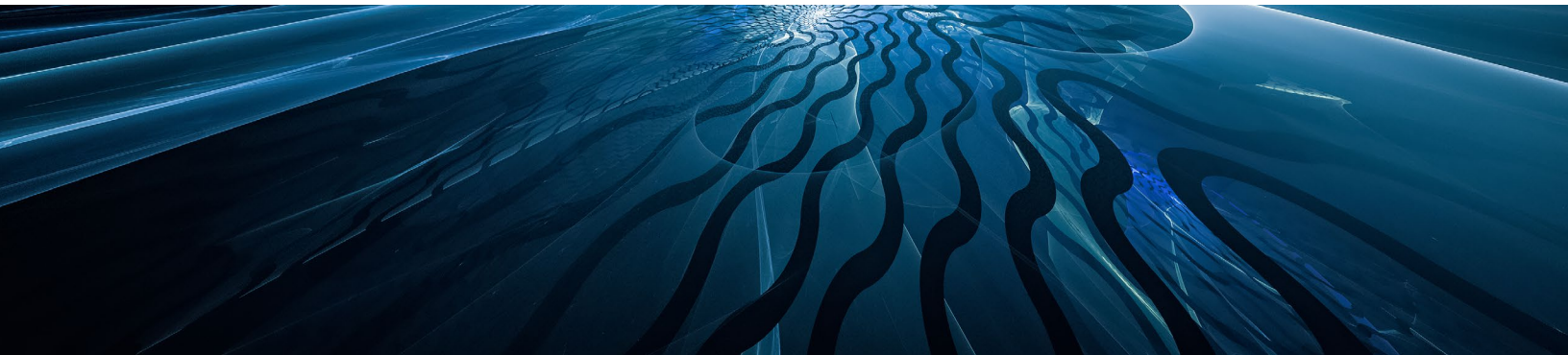

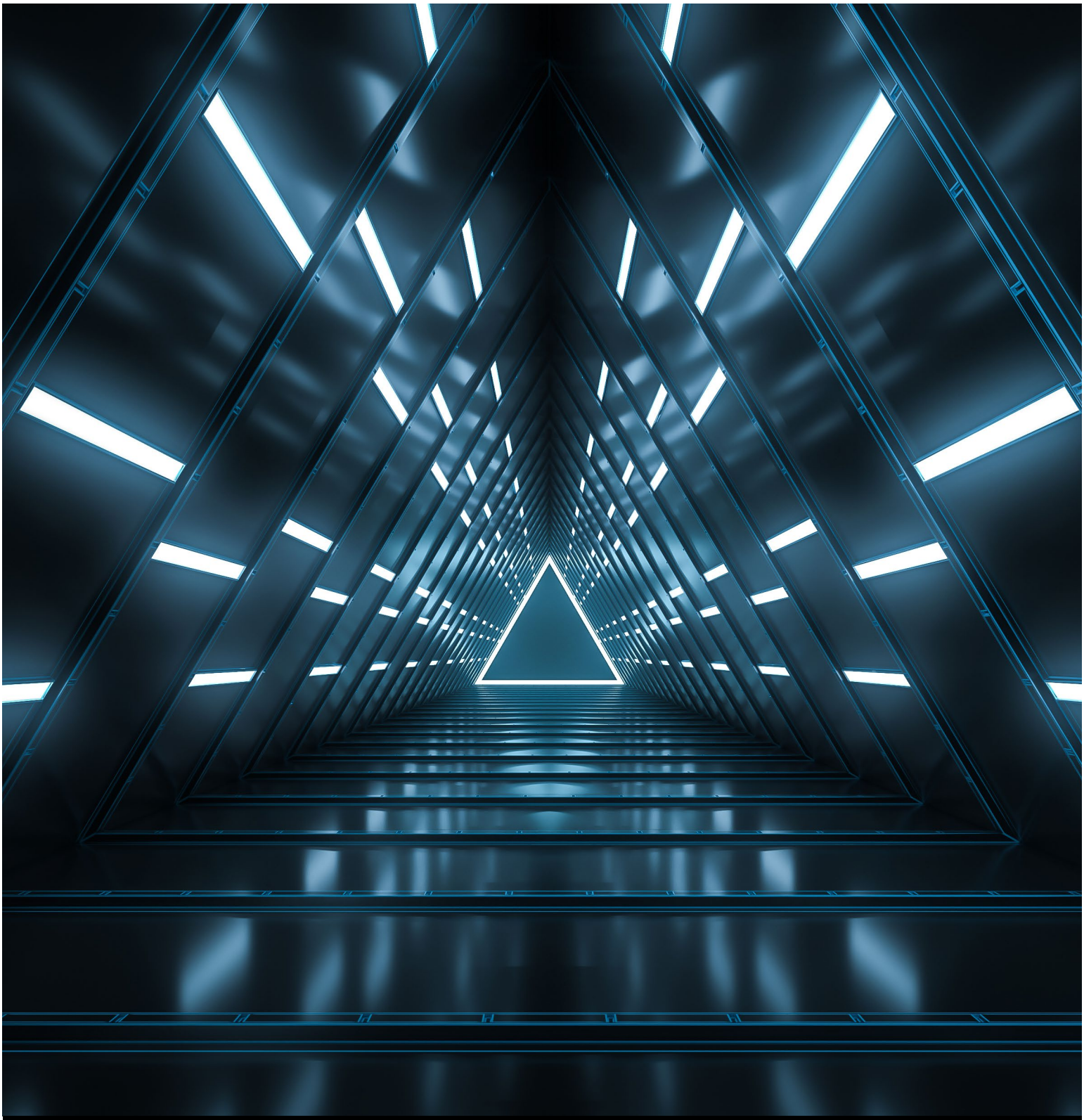

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INTOUCH

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