

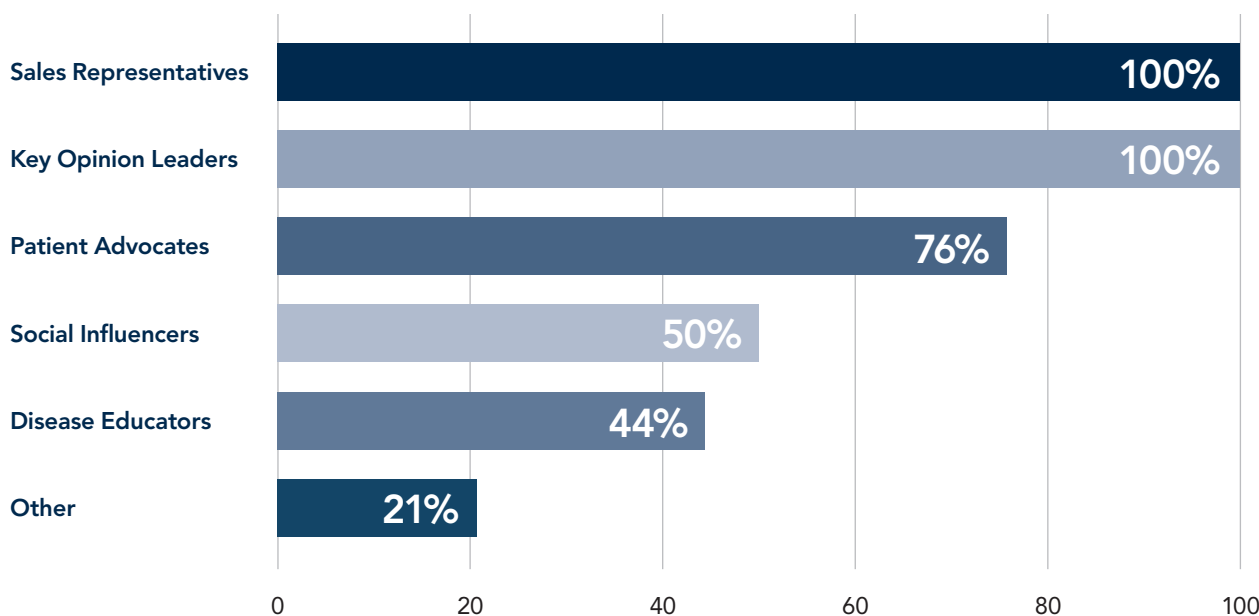
The results are in!

Diving into the data

We asked healthcare marketers to share the major trends and developments in healthcare most affecting them and their brands to help agencies and marketers get on the same page. **Here's what we heard.**

✓ Marketers continue to rely on tried-and-true outlets to communicate promotional messages

While other outlets are also being used to promote brand messages, all respondents in the survey reported that Sales Representatives and Key Opinion Leaders are the most employed ways to get their brand's message out. Social Influencers, not seen on previous surveys, make an appearance with 50% of respondents saying they will use them for message promotion.



✓ Budget spending focused on HCPs and Patients

Healthcare marketers continue to spend most of their budget dollars on HCPs and patients, with advocates, influencers, and payers receiving less spend. Interestingly, 25% of responders said that HCPs will receive more than 50% of their total budget.

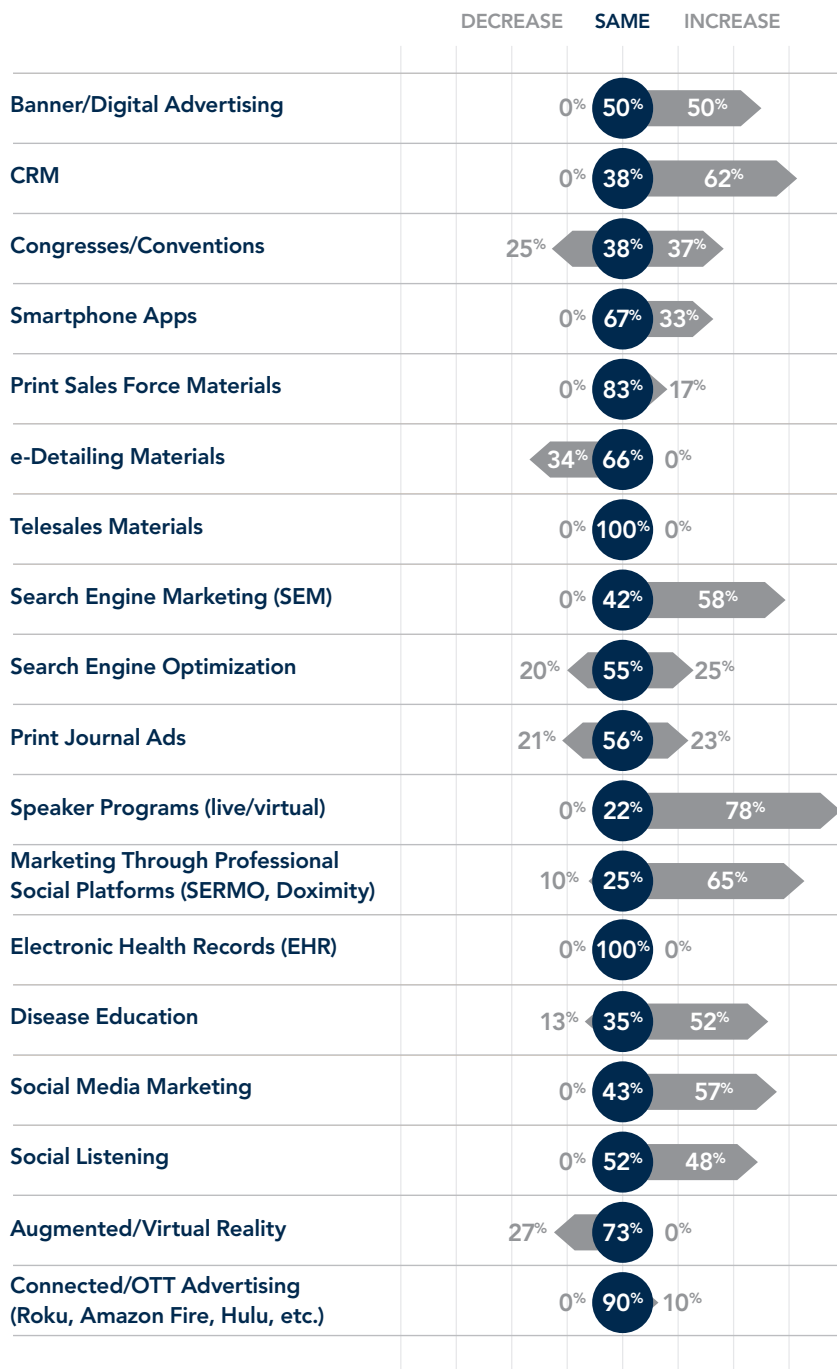
	0%	<10%	10%-25%	25%-35%	35%-50%	>50%
Professionals	–	–	–	52%	23%	25%
Patients/Caregivers	–	3%	90%	7%	–	–
Advocates	–	–	78%	4%	18%	–
Influencers	–	16%	62%	22%	–	–
Payers	–	78%	22%	–	–	–

And a majority of respondents (65%) reported that their budgets will increase in 2020, while only 15% said they would decrease.



Marketing mix continues to trend toward digital tactics

Marketers are increasingly turning to digital media and tactics as a core part of their marketing mix, with most respondents reporting either an increase in budget for these tactics in 2020, or maintaining 2019 spend. In particular, digital banners, SEM, and marketing through professional social platforms are all scheduled to see an uptick in the coming year. In fact, most respondents are reporting that their budgeting mix will see little decline compared to spend levels in 2019.

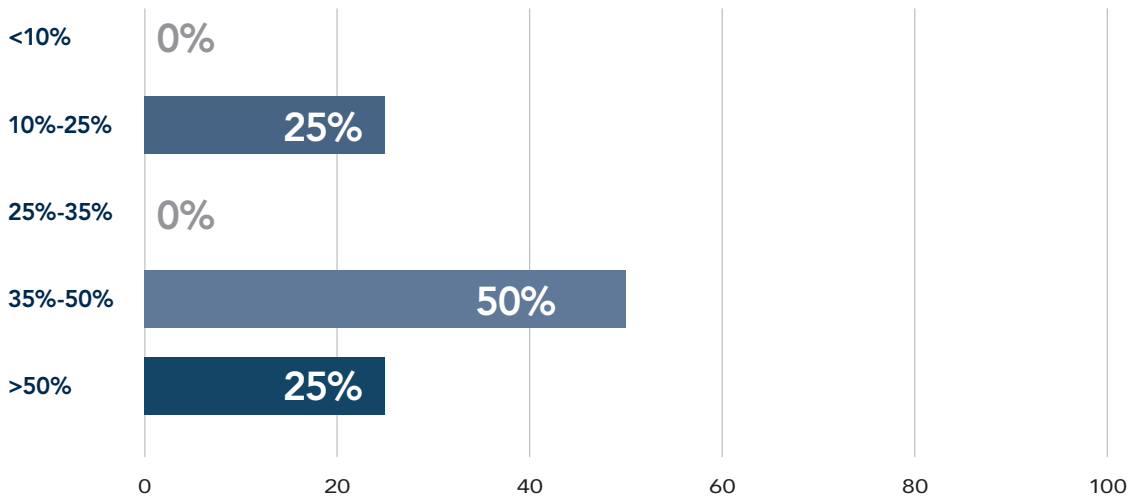




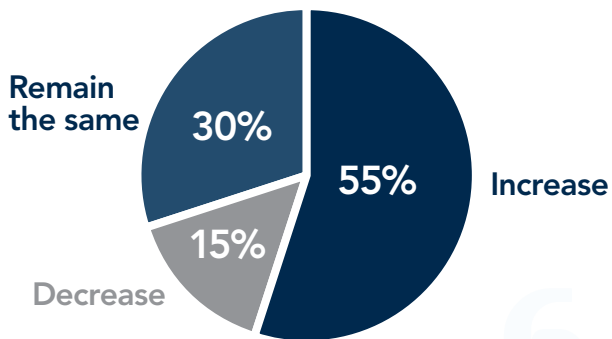
Marketing mix continues to trend toward digital tactics *(continued)*

The responses for the mix of traditional vs digital media reflect these trends, with the majority of respondents reporting that digital media spend will account for a significant portion of their marketing mix.

Percentage allocation of 2020 promotional budget spent on digital tactics



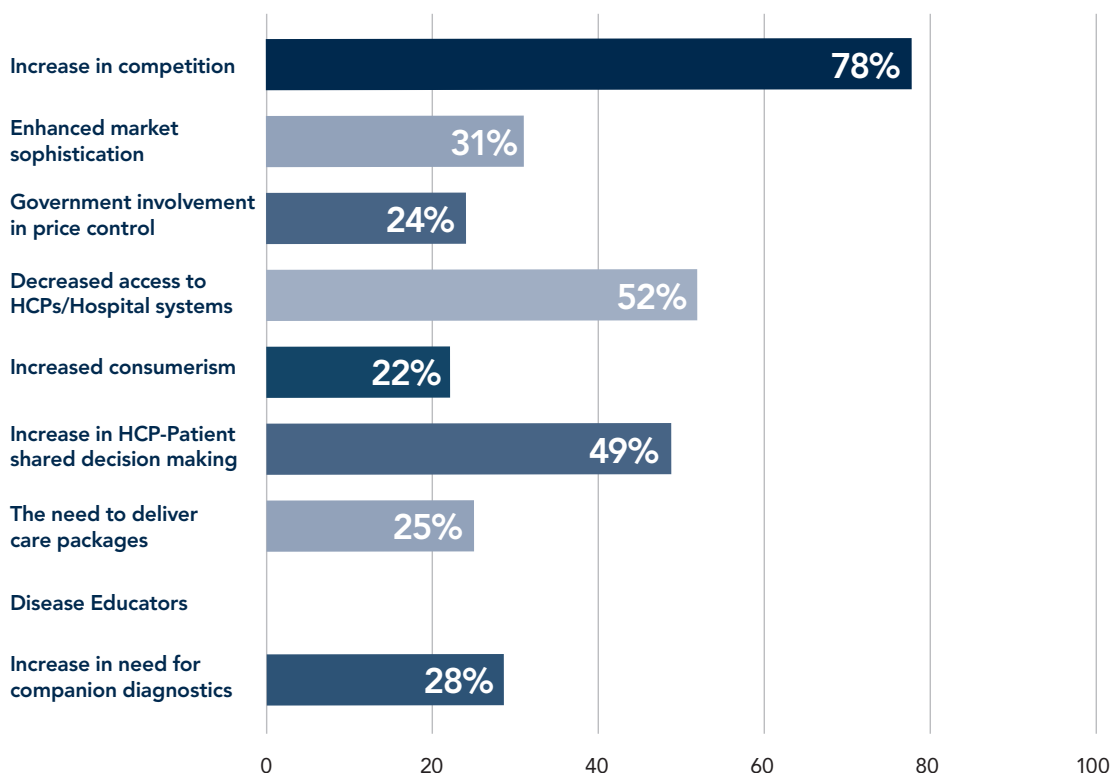
And how does this compare to last year's allocation?



Marketers are keeping a close eye on the competition

When considering which developments would most affect their business in 2020, the majority of respondents reported that increased competition would have the biggest impact. While this is often a concern for any marketer, the numbers are up from previous surveys. There is also growing concern regarding decreased access to certain healthcare providers and hospital systems, presenting greater challenges for marketers as they try to get brand messages to the appropriate targets.

Developments that will impact business in 2020



Social media strategies are on the rise

As both patients and healthcare professionals spend more and more time on social media, it's becoming increasingly important for marketers to employ these channels and find the right opportunity to reach their intended audience. In the survey, the majority of respondents confirmed that their brand has a social media strategy in place.

Existing social media strategy



Meanwhile, half of respondents reported that they are using social or online influencers to support their marketing efforts. This is the first time this question has been asked in the survey, and to see 50% of brands turning to influencers shows how rapidly marketing efforts are evolving.



Increasing need for data analytics

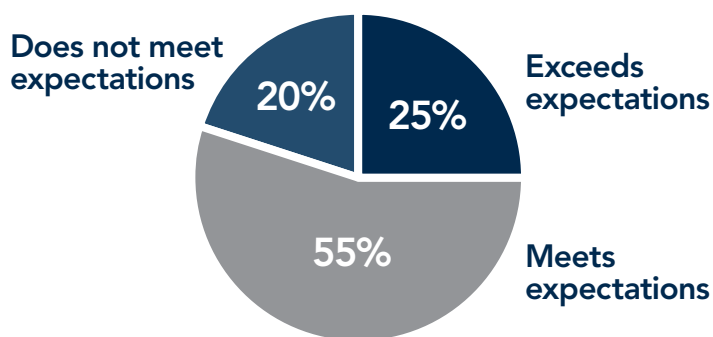
With the influx of data coming from an increasing number of sources, it's no wonder that a majority of respondents to the survey reported an increase in their need for data analytics. In fact, no respondent reported a decrease in their data analytics needs.

Data analytics needs for 2020



Overall, agencies are meeting expectations—but there's plenty of room to grow

55% of respondents reported that their agencies overall are meeting their expectations, while 20% say that their agencies are not meeting their expectations. Encouragingly, the remaining quarter of marketers report that their agencies are exceeding expectations. However, these results show that there is room to grow in the client-agency relationship arena.



Summary

This year's survey, continuing trends seen in previous years, shows the growing influence of digital media on healthcare marketers' choices in strategic and promotional efforts. While many of the traditional media are still being used to good effect, marketers have a wider array of channels vying for budget dollars. As more recent developments like the use of social influencers and virtual/augmented reality have gotten attention, it will be interesting to see how long their influence will be felt before something new comes along.

Your data has a story to tell. Let's go find it.

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