



# Trends in Healthcare and Life Sciences Marketing

Insights from over 300 marketing leaders worldwide



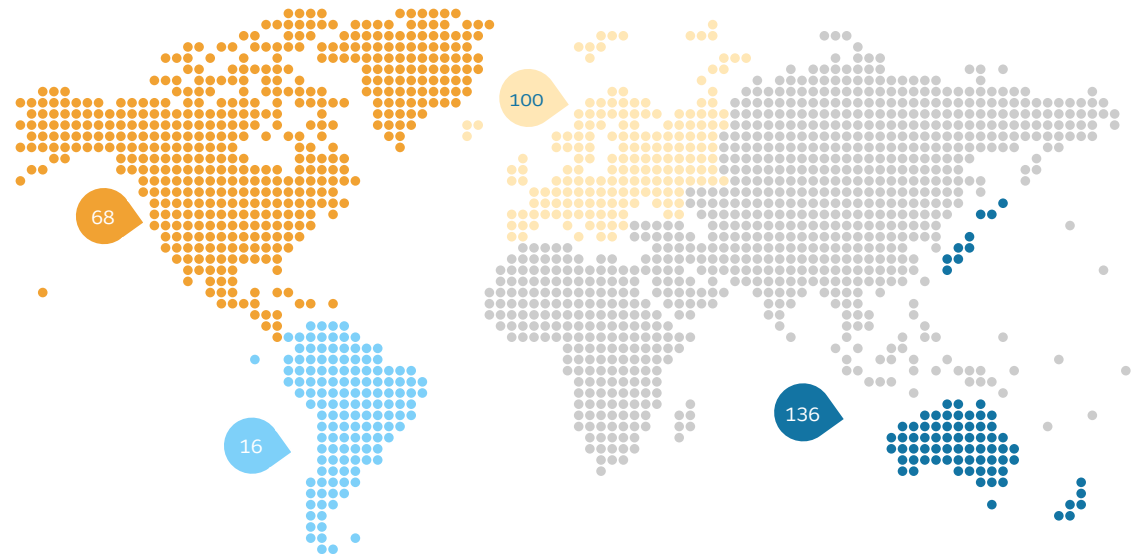
# About This Report

Salesforce Research surveyed over 300 healthcare and life sciences marketing leaders worldwide to discover how:

- Cross-functional dynamics are shifting to satisfy customer and business demands
- Data is transforming how marketers operate
- Personalization is becoming more refined at the crossroads of intelligence and trust
- New standards of engagement are inspiring and challenging marketers

Data in this report is a subset of findings from the fifth edition of the “State of Marketing” study conducted August 13 through September 23, 2018, that generated 320 responses from full-time healthcare and life sciences marketing leaders – those holding a manager or higher leadership role. Survey respondents are from North America, Latin America, Europe, and Asia Pacific. All respondents are third-party panelists (not limited to Salesforce customers). For further survey demographics, see page 17.

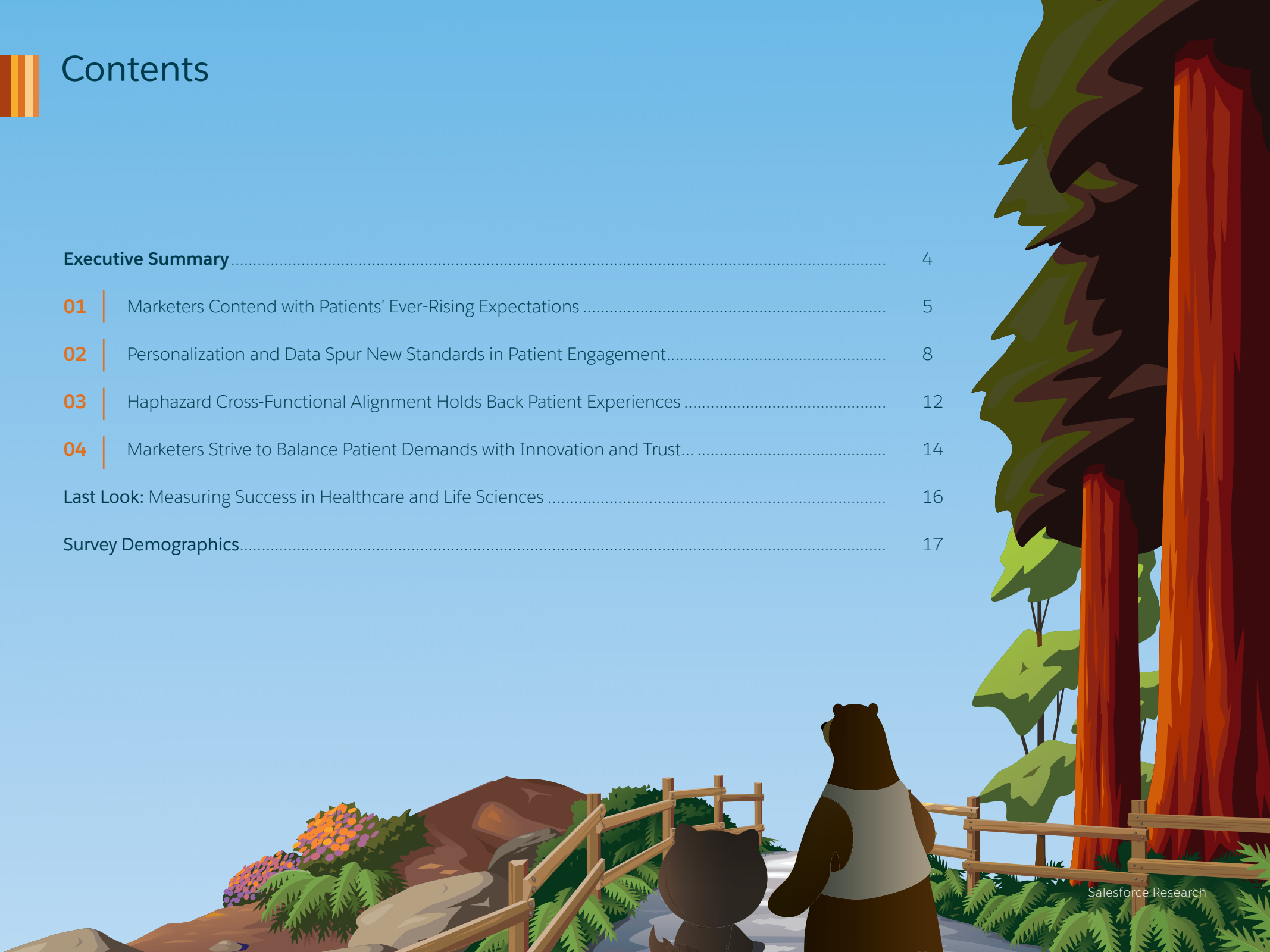
Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).



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With unprecedented access to information and growing ways to connect, patients' standards for care and engagement are higher than ever. There's mounting pressure for payers, providers, and even life sciences organizations to embrace new technologies and join forces across silos to engage patients on their terms across their entire journeys.

Here's an overview of the trends driving healthcare and life sciences marketers forward.

## 01 | Marketers Contend with Patients' Ever-Rising Expectations

(See page 5)

Marketers are uniquely positioned to lead patient experience initiatives and ensure that all points of the journey meet patients' higher-than-ever expectations. Healthcare and life sciences marketers' top priorities provide a window into how they are tackling this. **Fifty-one percent of healthcare and life sciences marketers believe that creating a connected patient journey across touchpoints and channels is critical to marketing success.**

## 02 | Personalization and Data Spur New Standards in Patient Engagement

(See page 8)

In the age of Amazon, the impact of personalized engagement extends far beyond the retail sector. Healthcare and life sciences marketers are seeing significant ROI from personalization across the entire patient journey – from when prospects first learn about their brand to when loyal customers advocate and evangelize on their behalf. **Eighty-four percent of healthcare and life sciences marketers say analyzing and applying customer data leads to marketing ROI.**

## 03 | Haphazard Cross-Functional Alignment Holds Back Patient Experiences

(See page 12)

To provide connected patient experiences, healthcare and life sciences organizations must make sense of all physical and digital patient touchpoints and ensure that all service line, care delivery, or patient services departments work in tandem. This means aligning on goals and success metrics, and having access to unified data streams. There's still work to be done to create this dynamic, unified experience. **Only 28% of healthcare and life sciences marketers are completely satisfied with their ability to create a shared, single view of the patient across business units.**

## 04 | Marketers Strive to Balance Patient Demands with Innovation and Trust

(See page 14)

Emerging technology and constant innovation foster improved personalization and connect companies to patients in real time. Healthcare and life sciences marketers grapple with the delicate balance between personalization and privacy, which ultimately shapes patients' trust in their organizations. **Fifty-five percent of healthcare and life sciences marketers consider trust a critical requirement for marketing technologies.**

# 01 Marketers Contend with Patients' Ever-Rising Expectations

Today's customers have access to an unprecedented amount of information anytime and anywhere. They receive digital reminders to restock their favorite items, seamlessly move across different digital channels throughout their day and turn to voice-activated technology to instantly answer any question. Constant connectivity is transforming consumers' standards for how companies interact with them.

Given healthcare and life sciences' outsized role in the economy, greater access to information and mounting patient expectations have a particularly big impact on the industry. The pervasiveness of data empowers patients to make health-related decisions holistically, considering not only the product and/or service, but their entire experience. Mounting patient expectations mean the bar is higher for healthcare and life sciences marketers to deliver a highly relevant and cutting-edge experience where and when patients want.

## Patients Demand Relevant and Engaging Journeys

### Consumers Who Believe the Following\*



\* "State of the Connected Customer," Salesforce Research, June 2018.



# 01 Marketers Contend with Patients' Ever-Rising Expectations

Always-on lifestyles and elevated experiences with other industries are prompting healthcare and life sciences marketers to reconsider how to win new patients and retain existing ones. Healthcare and life sciences marketers view enhancements to the patient experience as the way forward and are in a unique position to lead such initiatives across their broader organizations.

To do this, many healthcare and life sciences marketers are focused on creating the connected experiences that patients seek – those with cohesive brand communication across all touchpoints throughout the entire patient journey.

## Healthcare and Life Sciences Marketers View the Patient Journey as Their Road to Success



# 01 Marketers Contend with Patients' Ever-Rising Expectations

While healthcare and life sciences marketers recognize that improving the patient experience is critical, delivering on this proves to be more challenging. Fewer than half of healthcare and life sciences marketers are content with the experience they provide patients.

**44%** of healthcare and life sciences marketers believe they provide an experience that is completely aligned with patient expectations.

The industry's marketers have clear goals in place to close the gap between patients' expectations and reality. Allocating scarce resources across the right touchpoints and integrating marketing technology are among their top priorities.

At the same time, these marketers are struggling to meet customers' expectations for real-time engagement and unify the ever-expanding number of data sources they rely on. These obstacles present an even greater challenge than budget constraints.

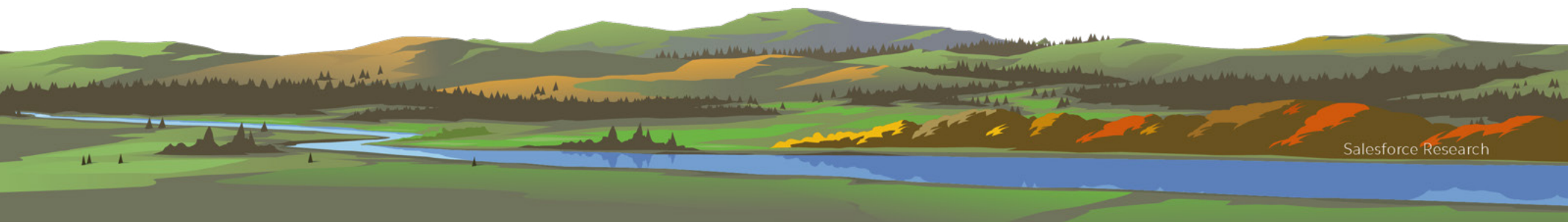
## Top Challenges Stand at Odds with Top Priorities

### Top Healthcare and Life Sciences Marketing Priorities

- 1 Optimizing the marketing mix for best return
- 2 Modernizing tools and technologies
- 3 Engaging with customers in real time
- 4 Balancing personalization with privacy
- 5 Unifying customer data sources

### Top Healthcare and Life Sciences Marketing Challenges

- 1 Engaging with customers in real time
- 2 Unifying customer data sources
- 3 Budgetary constraints
- 4 Creating a shared, single view of the customer across business units
- 5 Adopting and effectively using new marketing technologies





# O2 Personalization and Data Spur New Standards in Patient Engagement

Personalization has come a long way since the days when emails addressing customers by name were noteworthy. In the age of Amazon, marketers are pressured to take personalization to a new level, extending it across the entire customer journey – from when prospects first learn about their brand to when loyal customers advocate and evangelize on their behalf.

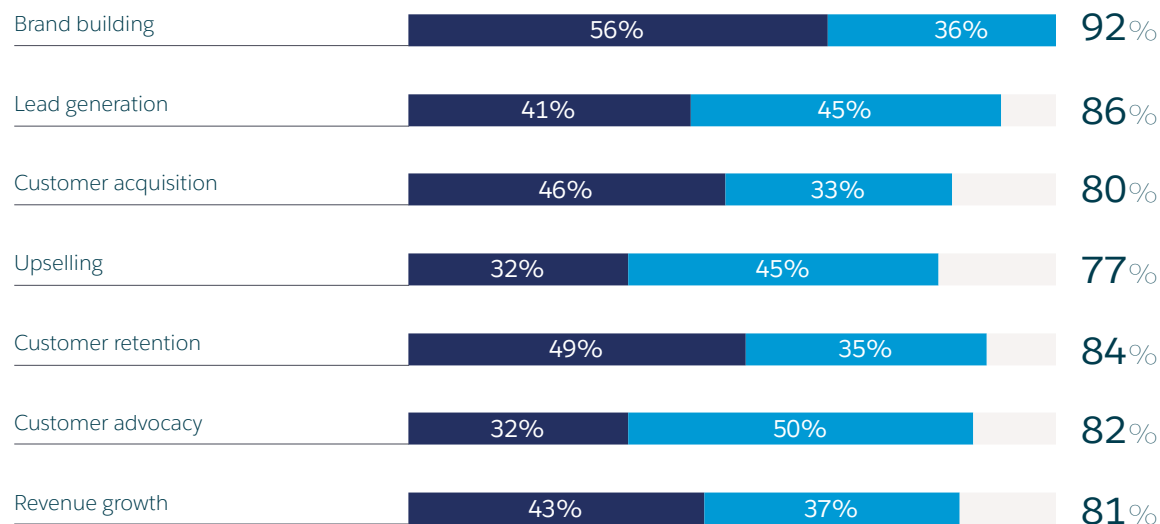
Patients expect content and experiences to be tailored to their unique needs. **Eighty-four percent of consumers say being treated like a person, not a number, is very important to win their business.\***

For healthcare and life sciences marketers, improvements in personalization have been successful both early in the patient journey – such as by building greater brand affinity and generating leads – as well as in later stages – such as through strengthened customer retention and even advocacy.

## Personalization Benefits the Entire Customer Journey

### Healthcare and Life Sciences Marketers Who Say Personalization Has Improved the Following

Major/Moderate Improvement



■ Major improvement ■ Moderate improvement

\* "State of the Connected Customer," Salesforce Research, June 2018.



## 02 Personalization and Data Spur New Standards in Patient Engagement

Healthcare and life sciences marketers are turning to more and more data sources to develop a richer understanding of their patients – such as who they are, how they engage, and what they need. **Eighty-four percent of healthcare and life sciences marketers say analyzing and applying customer data leads to marketing ROI.\***

Data proliferation has progressed more quickly for healthcare marketers, who are accustomed to engaging directly with patients, than for life sciences marketers. There are no signs of this trend slowing down for healthcare; projected growth is expected to accelerate in 2019.

To round out their understanding of customers and prospects, the industry's marketers rely on data sourced from outside their organization's four walls. Life sciences marketers, in particular, are likely to turn to second-party data – that which is shared between consenting parties like brands and publishers to extend audiences and refine growth targeting. However, recent growth in the use of second-party data by healthcare marketers is closing this gap.

### Healthcare Outpaces Life Sciences in Data Proliferation

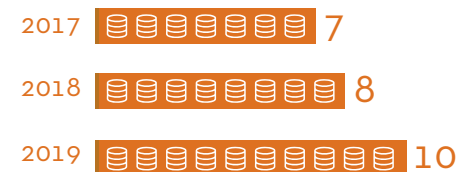
#### Average Number of Data Sources Used by Healthcare and Life Sciences Marketers

##### HEALTHCARE



Two-year projected growth rate: 88%

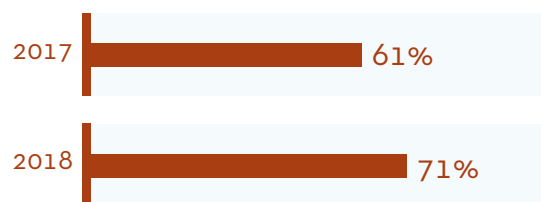
##### LIFE SCIENCES



Two-year projected growth rate: 54%

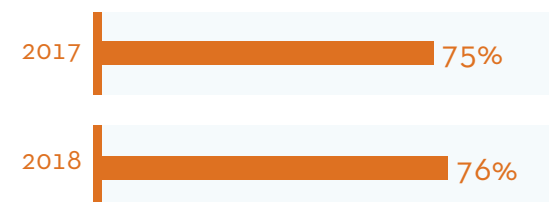
#### Healthcare and Life Sciences Marketers Using Second-Party Data

##### HEALTHCARE



Projected YoY growth rate: 16%

##### LIFE SCIENCES



Projected YoY growth rate: 2%

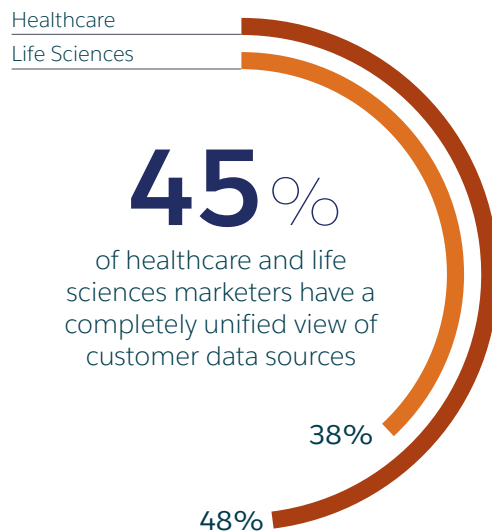
\* Major or moderate ROI

## 02 Personalization and Data Spur New Standards in Patient Engagement

Awash in data, healthcare and life sciences marketers are striving – but struggling – to paint a truly cohesive picture of patients' behavior and needs. This is exacerbated by the many touchpoints marketers use to connect with patients – such as social media, online search, mobile browsing, and more. The abundance of digital and physical sources – such as medical device data, customer relationship management data, and others – compounds this issue.

Unifying disparate customer data streams is a priority for 89% of healthcare and life sciences marketers.\* The upside is clear; the majority of healthcare and life sciences marketers say data unification yields ROI. Yet, fewer than half of healthcare and life sciences marketers have a completely unified view of these customer data sources, a particularly prevalent pain point in life sciences.

### Data Unification Is an Elusive Goal



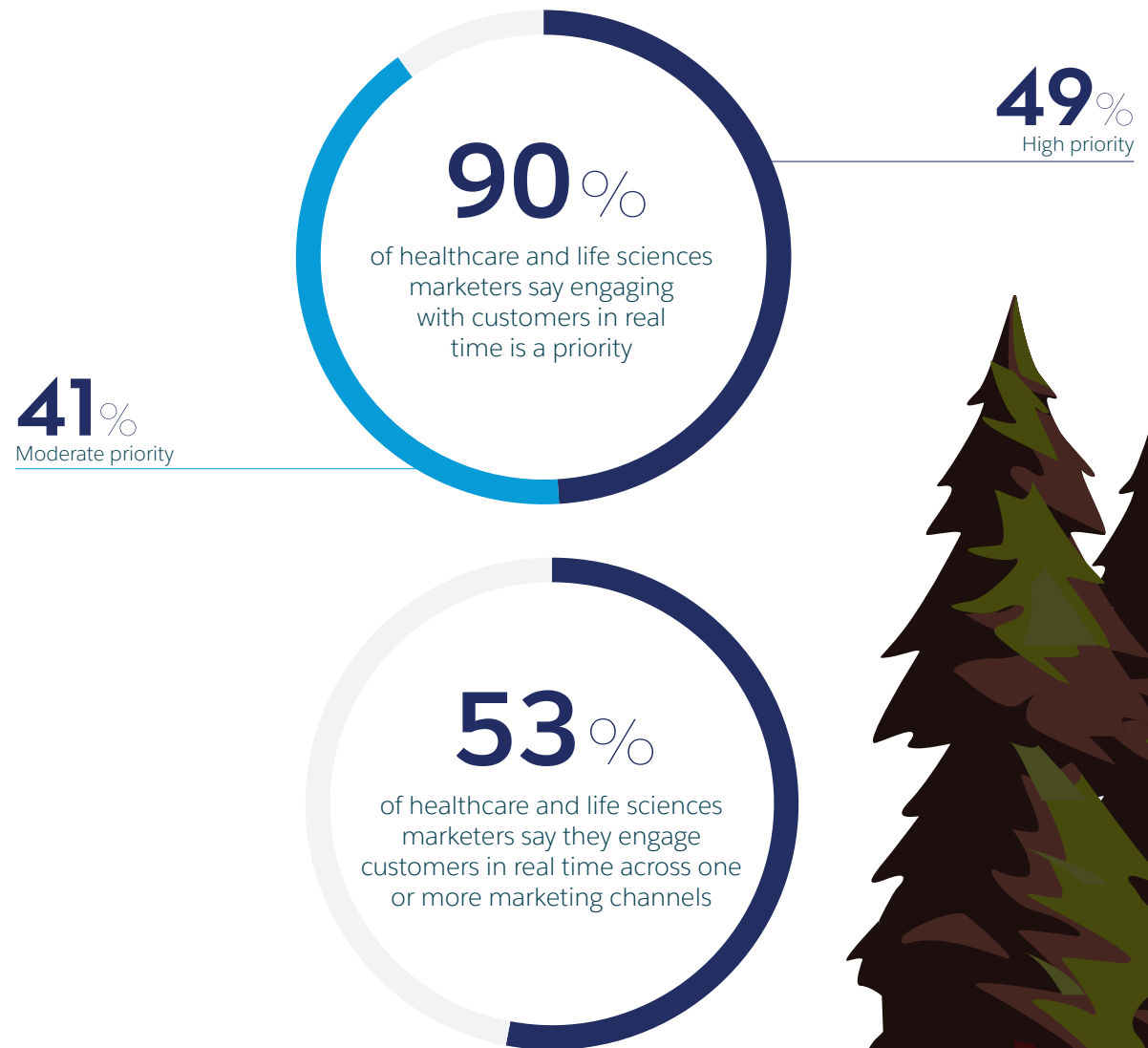
\* High or moderate priority

## 02 Personalization and Data Spur New Standards in Patient Engagement

In today's always-on culture, the concept of waiting is becoming a thing of the past. Rather than pushing out static messages, marketers are challenged to engage in real-time conversations with customers and prospects. **Sixty-three percent of consumers say instant/on-demand engagement is very important to winning their business.\***

While the overwhelming majority of healthcare and life sciences marketers see real-time engagement as a priority, making it a reality is easier said than done, as the average consumer uses 10 different channels to interact with companies. As a result, a mere 14% of consumers say companies generally excel at meeting their expectations for speedy communication.\*

### Marketers Aspire to Real-Time Patient Engagement Across Channels



\* "State of the Connected Customer," Salesforce Research, June 2018.

## 03 Haphazard Cross-Functional Alignment Holds Back Patient Experiences

Patients see one organization – not separate departments or lines of service in the integrated delivery network (IDN) or health system – and expect healthcare and life sciences teams to provide seamless experiences. In addition to making sense of all physical and digital patient touchpoints, marketers are beholden to marching in tandem with other customer-facing departments to provide truly cohesive experiences. **Sixty-seven percent of consumers say connected experiences are very important to winning their business.\***

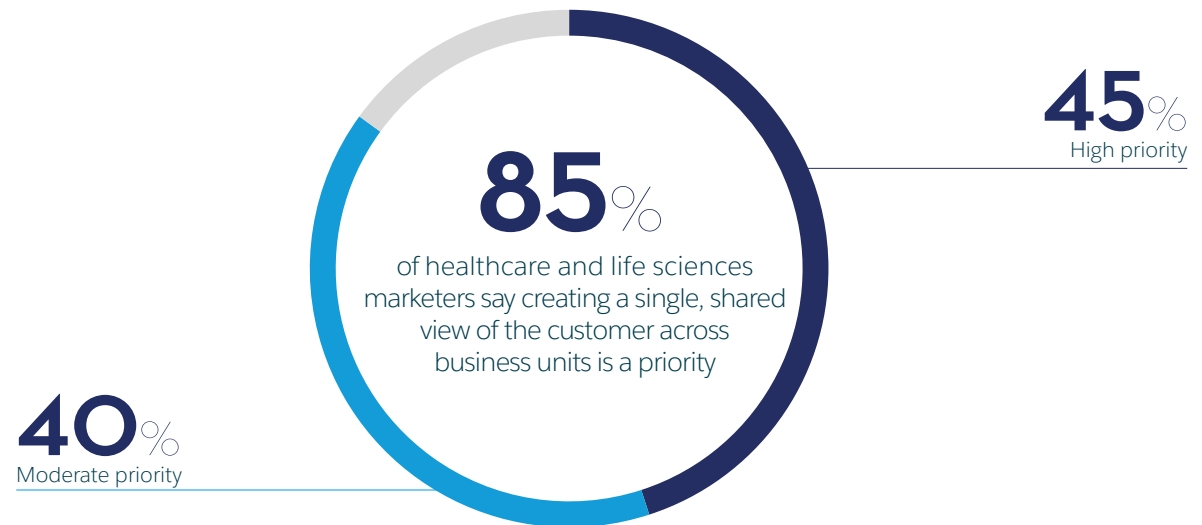
The vast majority of healthcare and life sciences marketers strive to provide each employee with the unified view of the customer they need, but those who have achieved it remain the exception to the rule.

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**28%** of healthcare and life sciences marketers are completely satisfied with their ability to create a shared, single view of the customer across business units.

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### Marketers Seek a Unified Patient View



\* "Trends in Integrated Customer Experiences," Salesforce Research, September 2018.

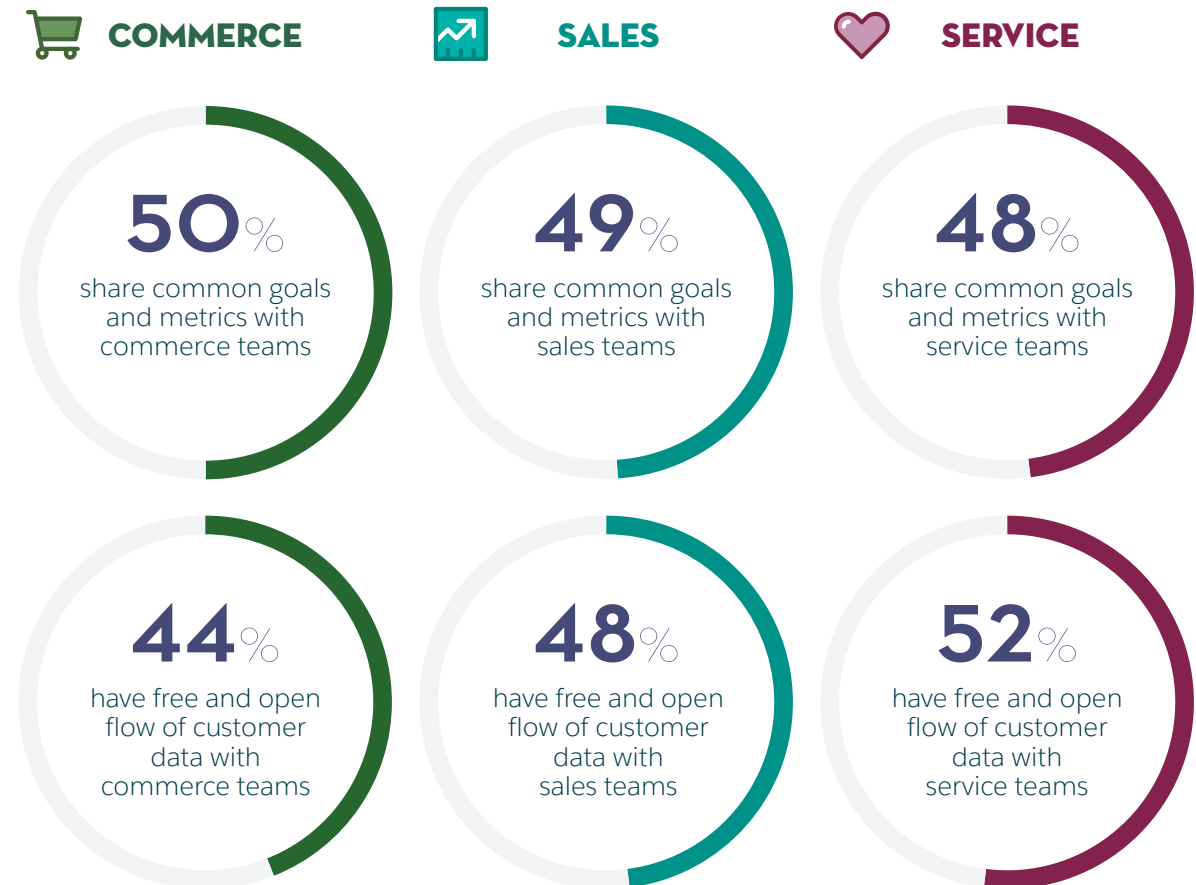
## 03 Haphazard Cross-Functional Alignment Holds Back Patient Experiences

Truly connected experiences require that all customer-facing roles work towards the same goals and objectives, with access to the same customer data.

However, progress achieving interdepartmental collaboration is variable at best. Half or fewer healthcare and life sciences marketing teams share common goals and metrics with commerce, sales, and service colleagues. A similar portion report a free and open flow of customer data.

### Goals, Metrics, and Data Are Often Siloed by Department

Healthcare and Life Sciences Marketers Who Say the Following About Their Relationships with Commerce, Sales, and Service



## 04 Marketers Strive to Balance Patient Demands with Innovation and Trust

The majority of consumers say the Internet of Things (IoT) (58%) and voice-activated personal assistants (56%) are actively transforming their expectations of companies. Nearly half of them (49%) say the same of artificial intelligence (AI)\*.

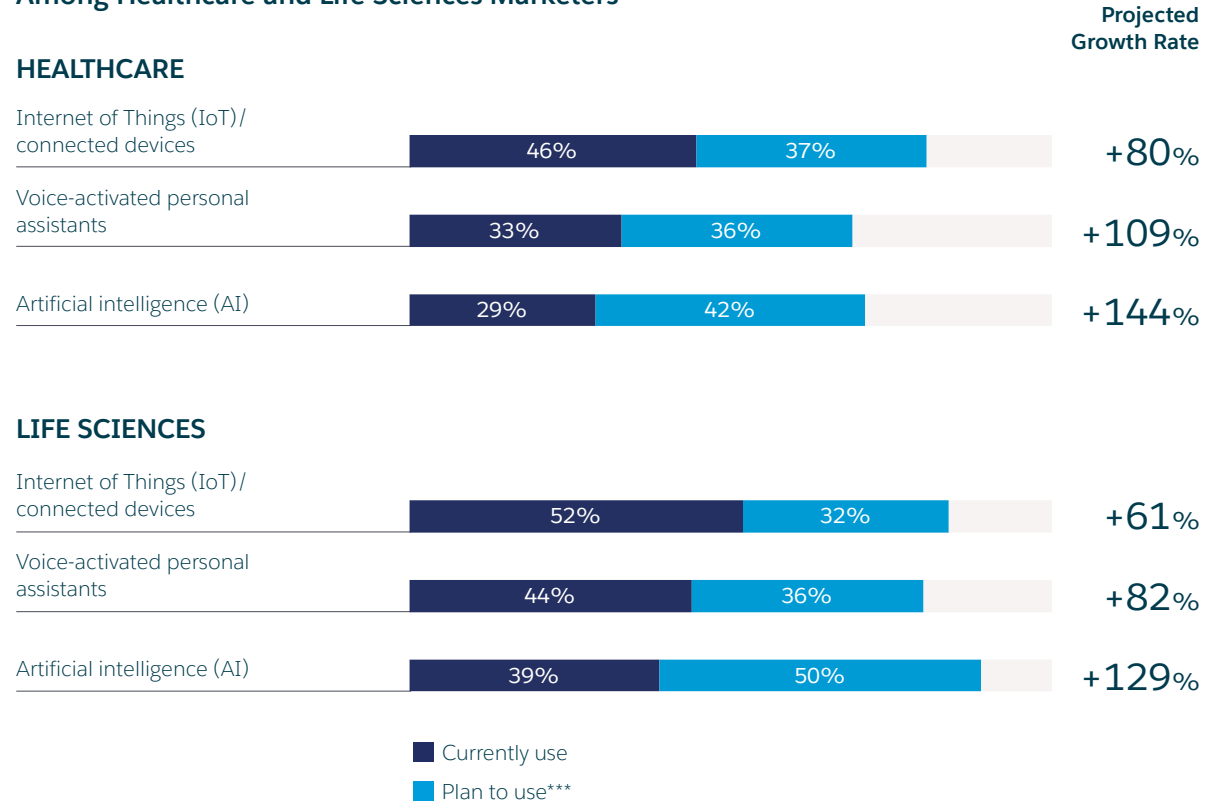
Healthcare and life sciences marketers are increasingly using these emerging technologies to engage patients at each point along their journey.

**88%** of healthcare and life sciences marketers say modernizing tools and technologies is a priority.\*\*

Marketers in life sciences currently have a higher adoption rate for voice-activated assistants and AI than marketers in healthcare. But healthcare marketers' use of such tools is growing.

### Marketers Increasingly Embrace Patient-Centered Technologies

#### Current and Intended Use of the Following Technologies Among Healthcare and Life Sciences Marketers



\* "State of the Connected Customer," Salesforce Research, June 2018.

\*\* High or moderate priority

\*\*\* For IoT and voice-activated personal assistants, planned usage is based on a 12-month period. For AI, planned usage is based on a two-year period.

## 04 Marketers Strive to Balance Patient Demands with Innovation and Trust

The surge in marketing technology offers opportunities for enhanced personalization and real-time engagement, but it comes with its fair share of challenges, particularly in an industry that is highly regulated. Healthcare and life sciences marketers must contend with HIPAA, HITECH, and GDPR regulations to protect health information in this time of rapid innovation. Striking the right balance between privacy and personalization is critical; building trust in the organization underpins the patient experience.

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**88%** of healthcare and life sciences marketers say complying with regional and/or local privacy regulations is a priority.\*

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### Marketers Strive to Maintain Patient Trust in a Time of Rapid Innovation

#### Healthcare and Life Sciences Marketers Who Believe the Following



\* High or moderate priority



## Measuring Success in Healthcare and Life Sciences

As marketing's purview expands to create a connected customer journey across touchpoints and channels, healthcare and life sciences marketers are turning to an expanded set of metrics to gauge their success.

Revenue growth remains the most-tracked healthcare and life sciences marketing metric, but it is joined by other measures that point to cross-functional collaboration. Customer satisfaction and retention rates – areas that have historically been success indicators for sales and service teams – are now on marketing's radar. As marketers seek a complete perspective of the healthcare and life sciences customer journey, more granular metrics – such as web traffic and analytics – are also included among top objectives.

### Success Metrics Take into Account the Broader Customer Journey

#### Top Metrics Healthcare and Life Sciences Marketers Currently Track

- 1 Revenue growth
- 2 Customer satisfaction metrics
- 3 Sales effectiveness
- 4 Customer retention rates
- 5 Web traffic and/or analytics

# Survey Demographics

## SUBINDUSTRY

Healthcare provider .....	61%
Life sciences, biotechnology .....	28%
Healthcare payer .....	12%

## COMPANY SIZE

Small (21–100 employees) .....	16%
Medium (101–3,500 employees) .....	72%
Enterprise (3,501+ employees) .....	12%

## COMPANY TYPE

Business-to-business (B2B) .....	20%
Business-to-consumer (B2C) .....	32%
Business-to-business-to-consumer (B2B2C) .....	48%

## COUNTRY

India .....	20%
United States .....	16%
Japan .....	10%
France .....	7%
Germany .....	7%
United Kingdom/Ireland .....	7%
Australia/New Zealand .....	6%
Canada .....	5%
Singapore .....	5%
Netherlands .....	4%
Belgium .....	3%
Mexico .....	3%
Nordics .....	3%
Brazil .....	2%
Hong Kong .....	2%

## REGION

Asia Pacific .....	43%
Europe .....	31%
North America .....	21%
Latin America .....	5%

## DEPARTMENT

Executive management .....	25%
Marketing .....	75%

## ROLE WITHIN MARKETING

CEO, owner, or equivalent .....	25%
CMO .....	12%
VP of marketing .....	13%
Director, manager, or equivalent .....	50%

## GENERATION

Baby boomers/Traditionalists (born before 1965) .....	7%
Gen Xers (born 1965–1980) .....	49%
Millennials/Gen Zers (born 1981–1999) .....	45%



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