

Transforming Pharma Marketing:

Underscore's Perspective

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Pharma marketing is at an inflection point

An explosion of data and technology is reshaping the industry. However, the widespread fragmentation within the healthcare ecosystem is contributing to a host of challenges for pharma marketers. It's also adding complexity to the process of data collection and analysis.

Data is scattered across many different touchpoints, platforms, and devices, making it nearly impossible to construct a comprehensive view of the HCP customer journey. Data fragmentation isn't the only hurdle pharma faces around developing and supporting effective marketing strategies. The industry also lacks analysts with a deep understanding of both data and pharma marketing. This makes

it difficult to derive the meaningful insights needed to drive decision-making and reliably predict outcomes. Tackling this challenge demands a strategic, holistic approach that goes beyond simply aggregating data from disparate sources. It requires deep industry expertise to cut through the noise and identify the insights that will truly move the needle. At Underscore, we have a unique perspective about how to activate data for pharma marketing that goes beyond technology and data collection.

As a media agency partnering closely with pharma brands, Underscore has a front row view to the changes rippling across the pharma marketing landscape. Our pharma clients still have some fundamental questions around how best to plan and optimize their marketing investments. We know how challenging it is for pharma to adapt to shifts in the market landscape because of unique issues that we'll expand on below.

The following topics are included here:



Key Focus Areas for Pharma To Realistically Advance Data-Driven Strategies



The Pharma Marketing Landscape: Key Trends Impacting the Industry



Pharma's Evolving Approach and Persistent Challenges to Data-Driven Marketing



Underscore's Value as A Pharma Marketing Partner

Key Focus Areas to Realistically Advance Data-Driven Strategies

At Underscore, we understand that simply aggregating more data or deploying the latest AI-powered tools isn't enough to address the unique challenges inherent to pharma marketing. We believe that the key to leveraging data for truly effective marketing in pharma requires deep industry expertise.

Our experienced team uses a strategic lens that goes beyond optimizing individual tactics and marketing approaches to focus on:

- ⇒ Uncovering insights needed to drive brand performance
- ⇒ Using approved creative and messaging strategies during the media planning process
- ⇒ Engaging qualified targets, regardless of whether doing so exceeds standard efficiency thresholds (e.g., higher CPMs or CPCs than is standard)
- ⇒ Using omnichannel strategies, particularly digital, to activate non-HCP responders with the goal of increasing total sales volume

Data and targeting alone can't answer bigger strategic questions that impact brand performance. Pairing rich data with deep industry expertise – combined with a strategic mindset – is the only way forward. We help our clients go beyond surface-level metrics and uncover actionable insights by:



Breaking down data silos to integrate granular data across key touchpoints like media exposure, website interactions, CRM, and field activities. This gives you a much more holistic understanding of how HCPs ultimately discover and prescribe treatments. It also allows you to create a continuous feedback loop that captures the "voice of the customer" throughout the engagement lifecycle.



Leveraging AI-enabled interactive tools like virtual assistants and chatbots that allow HCPs to "self-select" and express their needs in real-time. This is how you transform the static pharma website into a dynamic, AI-powered informational resource.



Adopting a progressive segmentation approach that builds and refines individual target profiles over time. We recommend incorporating variables like influencer circles, behavioral prescribing trends, hospital/health system affiliations, and patient demographics. This is what makes it possible to create relevant and personalized experiences that resonate with HCPs.



Collaborating with a strategic partner with a deep understanding of the pharma marketing landscape. Work with a partner who can provide more than data integration capabilities, but also has deep pharma industry experience. This collaboration should focus on developing and testing specific marketing hypotheses, identifying gaps in executing holistic strategies, and determining test-and-learn investment levels that unlock future growth without undue risk.

This last point is how we operate. We help our clients navigate these focus areas by leveraging our unique blend of cutting-edge technology, unmatched pharma expertise, and proprietary benchmarks derived from years of aggregated client data.

The Pharma Marketing Landscape:

Key Data and Digital Trends Impacting the Industry

The pharma industry is grappling with disruption from multiple sources. You're facing new market realities that impact everything from operations to innovation. While the technological Renaissance that's fueled by Big Data and activated by AI has potential to positively impact every aspect of the commercial model, these same trends create a perfect recipe for disruption. Below, we've provided a summary of what we see as the biggest changes to the pharma sector.



Consolidation of promotional data

- ⇒ Pharma companies and HCPs are trying to adapt to the massive availability of data so they can effectively leverage it for brand communication and improved patient care. Over the past 5 years, manufacturers' investments in both internal and external omnichannel analytics has skyrocketed. The primary focus of these investments is often improving customer communication, at least as the first step.
- ⇒ Implementing these systems, defining the customer journey logic, and developing sufficient assets to sustain campaigns is both expensive and time-consuming. Many organizations now require a combination of new data analytics roles as well as data privacy governance and oversight models just to manage the customer-level data required to optimize marketing campaigns.



More health data, everyday

- ⇒ At the same time, there is an influx of new data which is being used in healthcare delivery, including clinical data (e.g., biomarkers, genomic profiles), social data (e.g., social determinants of health), and wearables (e.g., passive diagnostic data from fitness trackers).
- ⇒ Medical and commercial marketers have dabbled with, but have a high degree of uncertainty around, how these data sets have a realistic role in commercial marketing.



The Customer Perspective

- ⇒ Increasing the use and value of promotional and customer data is challenging enough given persistent data silos, regulatory constraints, and the sheer volume and complexity of healthcare data that remains scattered across numerous systems. This is not just true for pharma but for our customers as well.
- ⇒ Even though the 2009 HITECH act helped to expedite EHR adoption across institutional and ambulatory US centers-of-care, in 2024, 94% of physicians believe that improved connectivity can enhance patient outcomes, and 85% say that ease of access to usable curated information would be a primary driver of better experiences and outcomes for both physicians and their patients.



Rise of Virtual Care Platforms

- ⇒ Virtual care platforms (e.g., "telehealth platforms") are emerging as a disruptive force in the healthcare ecosystem. Becker's Hospital Review recently reported that 91% of health system leaders have a telehealth program, and over 70% have recently expanded telehealth offerings. Since 2020, across the US, telehealth visits have represented more than 20% of all healthcare interactions.
- ⇒ End-to-end virtual care platforms such as Ro, Hims and Hers and Cove are expanding the health categories, as well as the in-home diagnostic and therapeutic services they provide.

In certain categories, including optometry, sexual health, weight management, migraines and mental health. These platforms can offer end-to-end care delivery including patient intake, diagnosis and treatment, at-home product delivery, and even ongoing remote monitoring.

⇒ Virtual care platforms present both opportunities and challenges for pharma marketers as they navigate how to engage with and integrate these new channels into their strategies. This is another disruptive dynamic that is passing many companies by while they are trying to build over-sophisticated solutions to yesterday's problems.

Pharma marketers and their partners are evolving approaches that use data and AI to better meet customer needs. As they do this, it's crucial to consider how other macro trends may impact the mindset of physicians and patients. These trends could also affect the long-term effectiveness of more traditional promotional investments.

Pharma's Evolving Approach & Persistent Challenges

Pharma companies are actively adapting data-driven strategies to address how HCPs discover, understand, and prescribe new treatments. The goal is to deliver messaging in a more effective, personalized way – but progress is slow compared to other industries.

Over the last five years, pharma has invested heavily in data platforms, tools, and analytics talent. This includes incorporating additional analytics and data science roles to adapt to AI-enabled technology.

Pharma is also exploring ways to adapt its traditional sales model to include virtual and hybrid engagements with HCPs. This shift raises questions about the effectiveness of current approaches, with some companies considering the need for entirely new digital strategies.



Here are some key observations we've seen as media partners:

The HCP Audience is Critical to Topline Revenue: While omnichannel data investments skew towards HCP audiences, Pharma companies are continuing to under-invest in digital HCP promotion relative to consumer/patient campaigns, particularly for launch brands. Being efficient with limited marketing dollars is critical but must be balanced with what's required to deliver topline sales.

Next-Best-Action is The First Step, Not the Only Step:

While next-best-action implementations have seen great improvements in exchanging data between personal and digital engagements, many sales teams remain on a learning curve when it comes to how to best use this information. This is further complicated by brands who have adopted virtual and hybrid detailing that breaks further from the traditional sales model.



Balance Sales Volume and Efficiency: Pharma marketing teams lack of confidence in digital. They're unsure if it can drive significant topline sales. Part of the issue here is that many omnichannel campaigns focus on increasing ROI. In some cases this translates to more refined targeting focused on the most productive HCP, but may leave marketers without a clear path forward to understanding how to activate non-responders that could increase total sales volume. Investing in analyses focused on scoring HCP promotional response potential, or time-boxed investment in underutilized or untapped channels, could be key to scaling marketing initiatives.

Also, Balance Efficiency with Quality and Return Potential: We've observed a continued emphasis on surface-level metrics like CPM efficiency and engagement rates in the determination of media budgets and plans. However, in a landscape becoming increasingly dominated by higher cost specialty and rare disease products, the lowest CPM does not necessarily equate to meaningful reach, engagement, and action from HCPs.



The Gap Between Data Aggregation and Practical Campaign Execution. It may be difficult for marketers to bridge the divide between having a theoretically comprehensive view of the customer and creating an actionable strategy for marketing. There is often a lack of coordinated planning between messaging and media strategies. For example, media teams may not be given the creative and messaging strategy when they are asked to plan. This is a major area of focus for Underscore. We put significant emphasis on the required connection between messaging and media placement/planning.



Underscore's Value as a Pharma Marketing Partner

As a strategic partner to pharma brands, Underscore is excited about the potential for data platforms, AI, and marketing technologies to revolutionize pharma marketing outcomes. But we also understand that many pharma marketers still struggle to answer fundamental questions about optimizing their marketing mix and measuring the impact of their efforts.

Our collaborative approach involves working closely with clients to navigate these challenges and drive measurable growth. We develop smart marketing hypotheses, create rigorous test-and-learn agendas, and apply thoughtful analysis through a pharma business lens. By identifying gaps in strategy and determining the right investment levels, we help pharma brands connect their promotional efforts directly to the metrics that matter most, such as script lift, new patient starts, and brand growth.

ABOUT UNDERSCORE

Underscore Marketing provides strategic omnichannel media & analytics solutions for highly targeted HCP & Patient audiences. It serves US and Global emerging and newly launched brands in pharma, biopharma, medical devices, and life sciences, with specialty in rare diseases and oncology therapies. Since our founding in 2002, we have focused on reducing the complexity of media planning and execution for DSE and branded communications to patients, HCPs and payers

with our consultative and "team extension" approach. We pride ourselves on maximizing media impact by synergizing human-led insight and data-driven media solutions with actionable business analytics.

If you're looking for a strategic partner to help you craft, execute and optimize media campaigns that drive your brand and return value to the business, reach out to us today to request an **expert consultation** ⇒



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