

Navigating the pharma marketing landscape



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Navigating the pharma marketing landscape

Challenges, strategies and future trends

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Navigating the pharma marketing landscape

Challenges, strategies and future trends

Competitive pressures, technological advancements and evolving healthcare professional (HCP) engagement strategies are transforming pharmaceutical marketing.

How are pharma marketing executives responding to these dramatic shifts? What barriers do they foresee in achieving their goals, and how are they planning to overcome them?

This executive summary details key insights from a new survey of more than 100 U.S.-based pharma marketing leaders. Respondents identified their most significant challenges, including the rapid adoption of artificial intelligence (AI) and market dynamics shaped by generics and biosimilars.

Findings reveal that marketing leaders are focused on improving patient and HCP engagement through digital platforms while tackling return on investment (ROI) measurement, data privacy and regulatory complexities. As AI and machine learning (ML) emerge as pivotal tools, executives are exploring innovative approaches to enhance marketing efficacy and optimize outcomes.



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Today's top pharma marketing challenges

The competitive landscape and technological transformation head the list

When asked to select their two main challenges, 46% cited competitive threats and market dynamics such as generics and biosimilars, while 41% cited the rapid adoption of digital technologies like AI, which require constant strategic pivots.

Many executives are facing healthcare reform and budgetary pressures

More than one-third of leaders (35%) reported that healthcare reform and reimbursement policy affecting market access is a major concern, followed closely by limited marketing budgets (34%).



46%

Competitive threats and market dynamics

41%

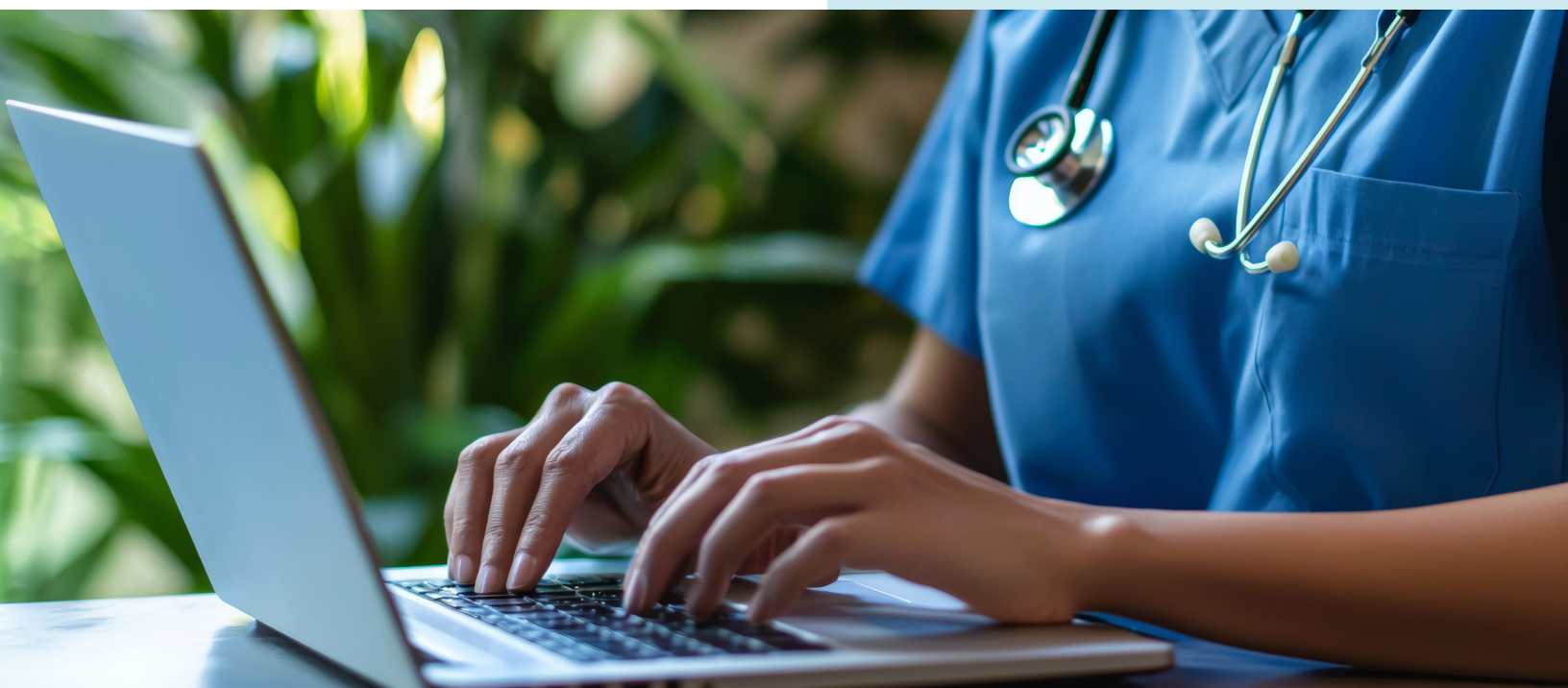
The rapid adoption of digital technologies, like AI, requiring constant strategic pivots

35%

The impact of healthcare reform & reimbursement policy on market access

34%

Limited budgets for sufficient marketing activity and impact



Other marketing challenges are cited less frequently

The survey included a range of many other possible marketing challenges, and most marketers were not as highly concerned about them.

Specifically, 22% are deeply concerned about measuring ROI with long sales cycles and multiple factors influencing purchase decisions, 19% with creating high-quality content that resonates with high-value audiences, and 18% with engaging HCPs to build relationships and convey drug benefits.

Only 15% of leaders are highly concerned about engaging specific target patient segments, followed by 14% who have serious concerns about technology integration for effective omnichannel marketing, and 13% for whom tracking and analyzing marketing performance data are key.

Fewer than 10% of executives are highly concerned about allocating direct-to-consumer (DTC) and HCP budgets, data privacy regulations, consistent brand management across channels, and increasing pharma marketing transparency.



22%

Measuring ROI with long sales cycles and multiple factors influencing purchase decisions

19%

Creating high-quality content that resonates with high-value audiences

18%

Engaging HCPs to build relationships and understanding of drug benefits

15%

Reaching and engaging specific target patient segments

14%

The technology integration necessary for effective omnichannel marketing

13%

Tracking and analyzing marketing performance data

7%

Data privacy regulations & their implications for marketing

7%

Allocating D2C and HCP budgets appropriately to optimize impact

6%

The demand for pharma marketing transparency

6%

Consistent brand management – identity and messaging – across channels

Strategic marketing goals for 2025

Digital tools and platforms will play a prominent role

Many pharma executives (42%) report that one of their primary marketing goals is to use digital tools and platforms to improve patient engagement, adherence and outcomes.

Data and analytics will be implemented by more than two out of 10 leaders

Almost one-third (31%) of executives are focused on optimizing their marketing spend through analytics and data insights. Other data and analytics goals include AI and ML solutions to enhance marketing activities (23%), developing metrics to track and measure marketing ROI (22%), and using real-world data to support a drug's value proposition (20%).

42%

of marketing leaders are focused on using digital tools and platforms.

42%

Utilize digital tools and platforms to improve patient engagement, adherence, and outcomes

31%

Leverage analytics and data insights to enable data-driven decision-making that optimizes marketing spend

24%

Build strong relationships with payers to improve market access and coverage

23%

Implement AI and machine learning solutions to optimize marketing activities and insights

22%

Develop robust metrics to track and measure the ROI of marketing campaigns

21%

Identify and leverage cost-effective marketing channels and tools to deliver results

20%

Collect and leverage real-world data to support the value proposition of a drug



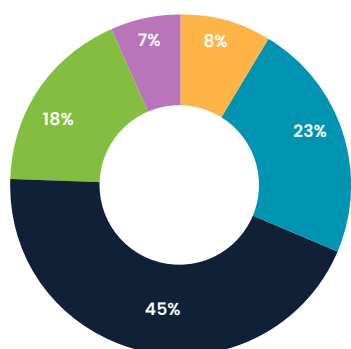
Relationship building and cost-effective channels and tools are priorities for many

More than two in 10 leaders plan to improve market access and coverage by building strong relationships with payers (24%) and identifying and leveraging cost-effective marketing channels and tools (21%).

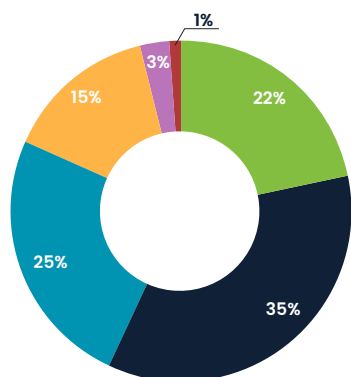
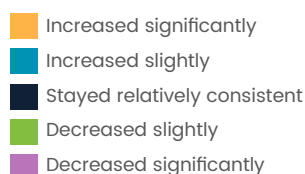
Less frequently cited marketing goals in descending order are using market research to identify opportunities and trends (19%), crafting messaging and personalized content to individual patients (18%), fostering patient relationships via social media platforms (14%), adopting technologies to gain a competitive edge (14%), staying informed about regulatory changes and adapting strategies accordingly (9%) and ensuring compliance with data privacy regulations (6%).

Fewer than 3% of marketers are prioritizing measures to comply with evolving privacy regulations, integrating channels to create a seamless patient experience, and adhering to transparency requirements and disclosing relevant information.

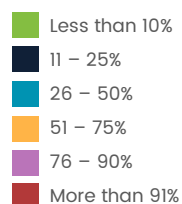
2025 budget/digital advertising trends



Budgets are relatively stable in a dynamic environment. Most leaders (45%) cited no changes to their marketing budgets. Only 8% said their budgets increased significantly, and a mere 7% reported funding decreased significantly.



Digital advertising budget allocations vary. The largest percentage (35%) spends 11–25% of their budgets on digital ads.



19%

Conduct ongoing market research to identify new opportunities and trends

18%

Craft messaging and content personalized to individual patients

14%

Explore and adopt technologies to gain a competitive advantage

14%

Foster meaningful interactions with patients on social media platforms

9%

Stay informed about regulatory changes and adapt marketing strategies accordingly

6%

Ensure compliance with data privacy regulations and protect patient data

45%
of marketing budgets
remain unchanged

HCP digital marketing objectives

When targeting HCPs through digital marketing, over half of pharma executives report their primary objectives are to build brand awareness and recognition as well as provide relevant and valuable education and information about products, diseases and treatment options.

Engagement and sales support also rank highly among many marketers' objectives. Establishing and maintaining strong relationships and engagement with HCPs is keenly important to 46% of respondents. Supporting sales teams by generating leads, delivering educational materials and facilitating communication with HCPs was a top concern of 39% of marketing leaders.

Lesser-chosen objectives include lead generation and conversion (23%), gathering competitive intelligence to stay ahead of the curve (18%), and protecting and enhancing brand reputation (17%). Only 6% of marketing leaders cited increasing continuing medical education (CME) as a main objective.



56%

are focused on building brand awareness and recognition, while

52%

prioritize education and information.

56%

Build brand awareness and recognition

52%

Provide relevant and valuable education and information about products, diseases and treatment options

46%

Establish and maintain strong relationships and engagement with HCPs

39%

Provide valuable support to sales teams by generating leads, delivering educational materials

23%

Generate leads and convert them into prescribing physicians

18%

Gather information about competitors' activities, products, and marketing strategies

17%

Protect and enhance the reputation of the brand and its products

6%

Increase CME completion rates through targeted marketing initiatives

Current HCP digital marketing challenges

The greatest concerns are gaining attention and standing out in a crowded market

When executing digital campaigns to reach HCPs, 50% of marketers report a leading challenge is gaining HCP attention and interest during their limited time for non-clinical activities. Standing out in the overwhelming volume of digital content HCPs is an equally difficult challenge.

Top challenges cited by approximately one in four or more leaders include adhering to regulations about drug claims and promotional materials (30%), measuring digital campaign effectiveness when traditional metrics don't accurately reflect the impact of campaigns on HCP behavior (27%), and finding creative ways to reach HCPs on social media platforms that restrict pharma product promotion (24%).

Fewer than 20% of marketers identified the remaining question options as one of their top three challenges. In descending order of priority are implementing emerging technologies while remaining compliant with data privacy and ethical considerations (19%), attributing conversions to specific marketing efforts (17%), presenting a drug's benefits and risks in a balanced manner (16%) and securing investment and expertise to leverage VR and AR to enhance education and training (12%). Of least concern (9%) is maintaining a presence on social media platforms and search engines with frequent algorithm changes.



50%

Gaining HCP attention and interest in their limited time for non-clinical activities

50%

Standing out in the overwhelming volume of digital content HCPs receive

30%

Adhering to regulations, such as FDA guidelines, that limit the types of claims and promotional materials that can be used

27%

Measuring campaign effectiveness when traditional metrics may not accurately reflect the impact of digital campaigns on HCP behavior

24%

Finding creative ways to reach HCPs on social media

19%

Implementing emerging technologies like AI and machine learning

17%

Attributing conversions back to a specific marketing effort

16%

Achieving fair balance in promotional materials

12%

Securing investment and expertise to leverage virtual and augmented reality to enhance medical education and training

9%

Maintaining a presence on social media platforms and search engines with the frequent algorithm changes

Emerging digital marketing trends and technologies for HCP engagement

Marketing leaders are most enthusiastic about AI and ML

Of emerging digital trends and technologies for HCP engagement, AI and ML was a clear favorite, selected by 72% of marketers as one of the three top choices that excites them most. More than half of marketing executives cited advanced data-driven targeting and personalization (52%) as an exciting trend.

Interactive content (quizzes, polls, interactive infographics) was the third most popular marketing tactic (30%) followed by chatbots and virtual assistants (20%), virtual and augmented reality (VR and AR) (16%), voice search optimization and smart speaker integration (13%), and blockchain technology to ensure data privacy and security (12%).



72%
are most excited by
AI and ML.



AI/ML identified as one of the three top choices that excites them most



Advanced data-driven targeting and personalization



Interactive content



Chatbots and virtual assistants



Virtual and augmented reality



Voice search optimization and smart speaker integration



Blockchain technology to ensure data privacy and security



Most leaders plan to incorporate analytics and AI-powered tools into digital marketing strategies

Pharma leaders chose up to three emerging digital marketing strategies they intend to incorporate into their HCP marketing plans.

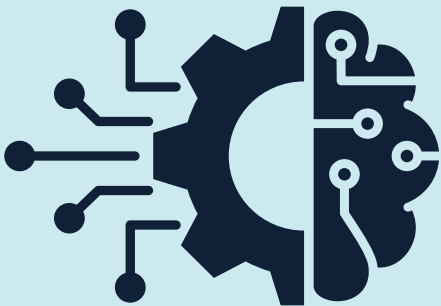
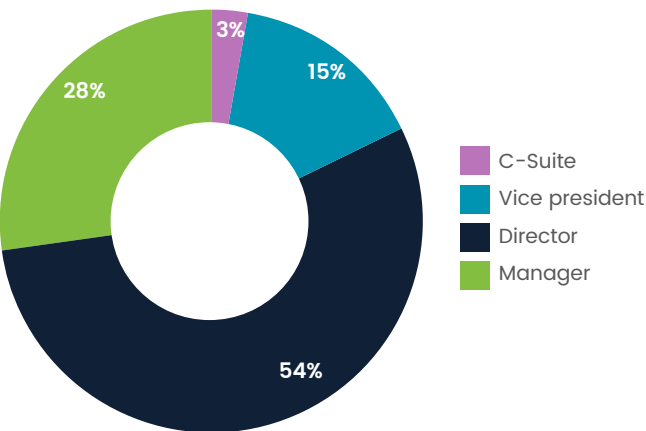
Three out of five executives report that they plan to leverage data analytics and insights to tailor marketing efforts to specific HCP segments/preferences (61%), and to experiment with AI-powered tools to personalize content, predict HCP behavior and optimize marketing (59%).

Many leaders intend to use interactive content followed by AR and VR

More than four out of ten leaders (45%) plan to use interactive content to engage HCPs. A smaller percentage (28%) plan to engage HCPs by leveraging VR and AR to deliver immersive product demonstrations, training simulations, and/or virtual conferences. A minority plan to employ chatbots and virtual assistants (16%), or to optimize content for voice-based queries (11%).

Methodology

The research was sponsored by epocrates and conducted online using Questex databases from October 2024 to January 2025. All 105 U.S.-based pharma marketing leaders hold manager-level titles or above; 72% are director-level or higher.



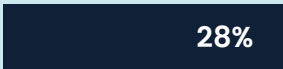
Leverage data analytics and insights to tailor marketing efforts to specific HCP segments/preferences



Experiment with AI-powered tools to personalize content, predict HCP behavior and optimize marketing



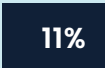
Create interactive content to engage HCPs



Leverage VR/AR to deliver immersive product demonstrations, training simulations



A minority plan to employ chatbots and virtual assistants



Optimize content for voice-based queries





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