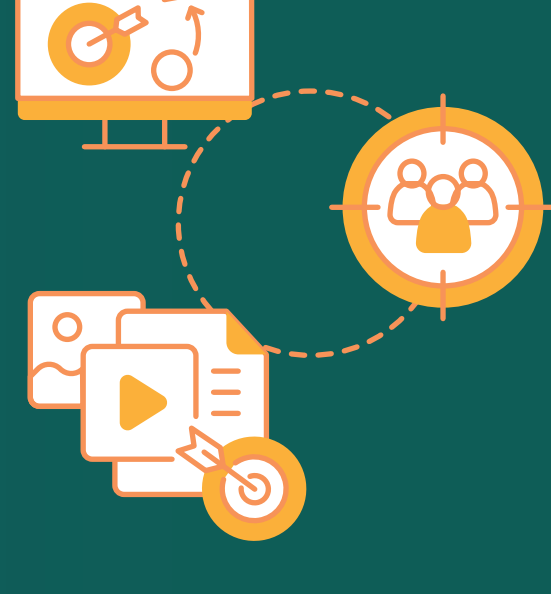


## INTRODUCTION

- An evolution is happening in pharma sales and marketing.
- Digital channels are now in the spotlight, driven by changing preferences, technology, and regulation.

### Key factors shaping this transformation:

- Telemedicine and e-detailing
- Data analytics and personalization
- Online presence
- Social media
- Email promotions
- Content marketing
- Online promotions

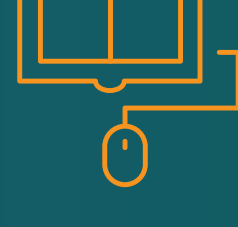


## REPORT SCOPE

Five years of data: January 2018 to December 2022



Approximately 140 MMx studies across life sciences companies



70+ brands across 19 therapy areas



Products ranged across various stages of growth:



- **Launch stage 9%**  
Products in the market for less than two years post-launch
- **Growth stage 48%**  
Products in the market for at least two years post-launch and continue to exhibit at least 5% growth per year at the time of analysis
- **Mature stage 43%**  
Products in the market for at least three years post-launch and no longer exhibiting robust growth

## TREND 1: INCREASED SPENDING ON DIGITAL MEDIA



Figure 1: Channel Spend Distribution, 2018-2022

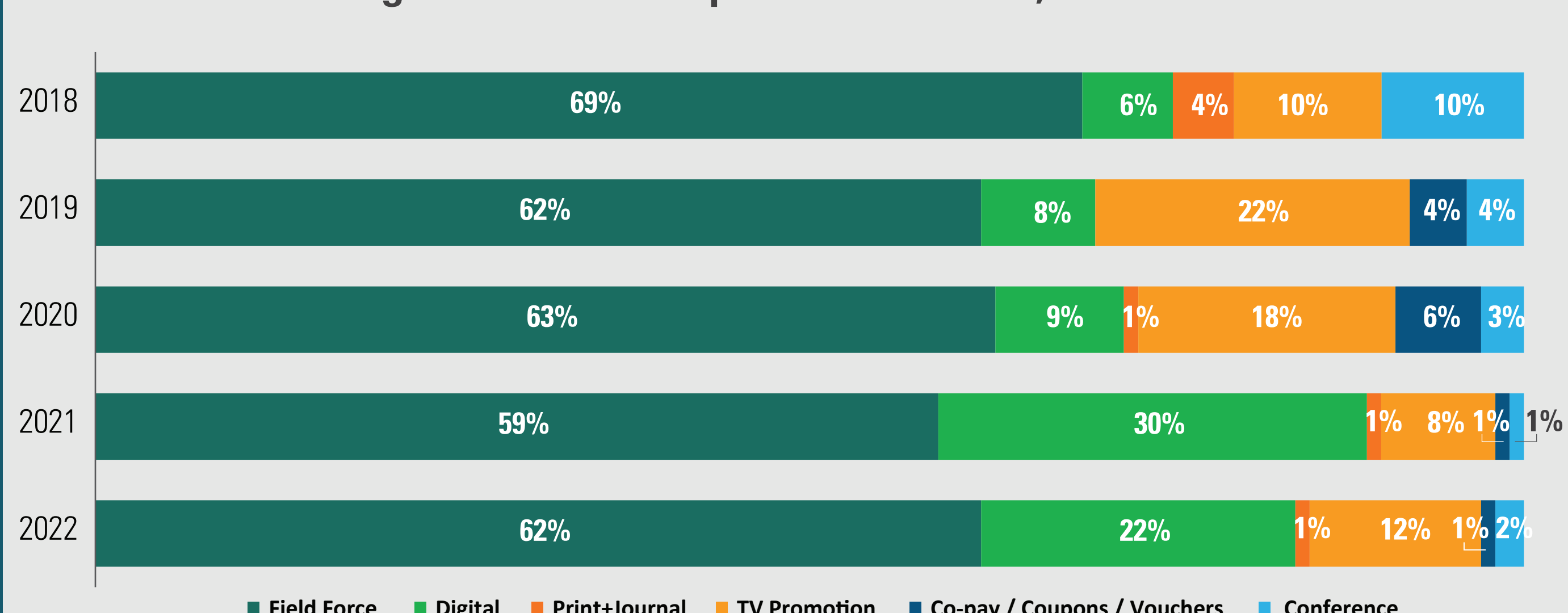


Figure 2: Average Digital Spending Trend (\$)

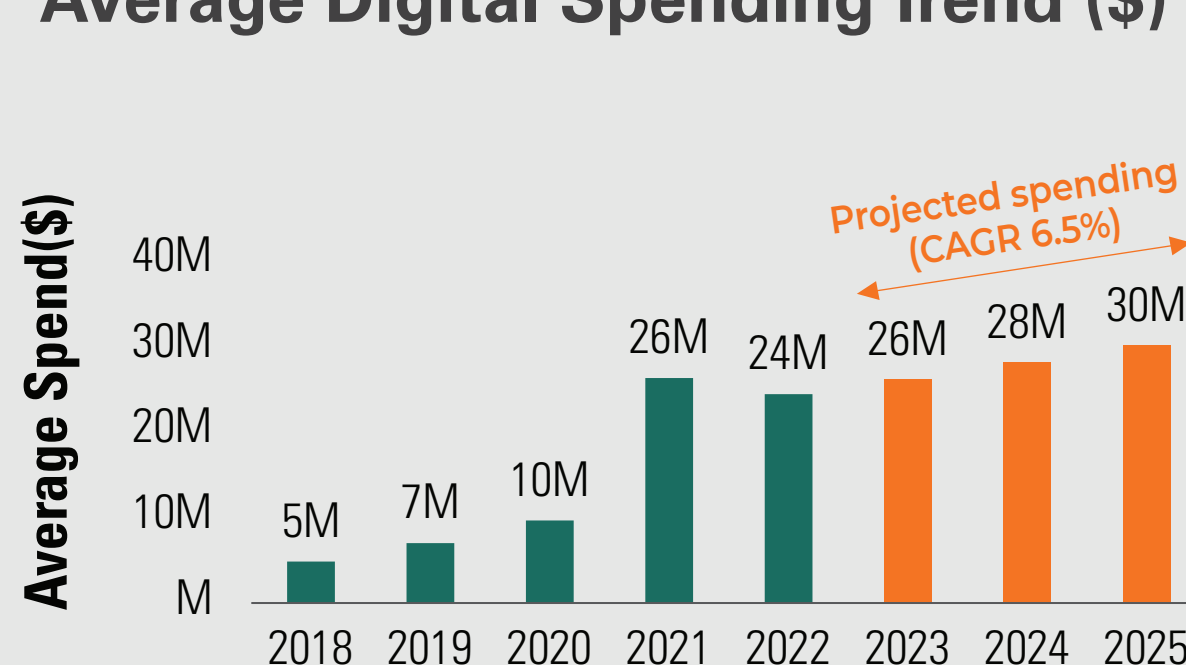
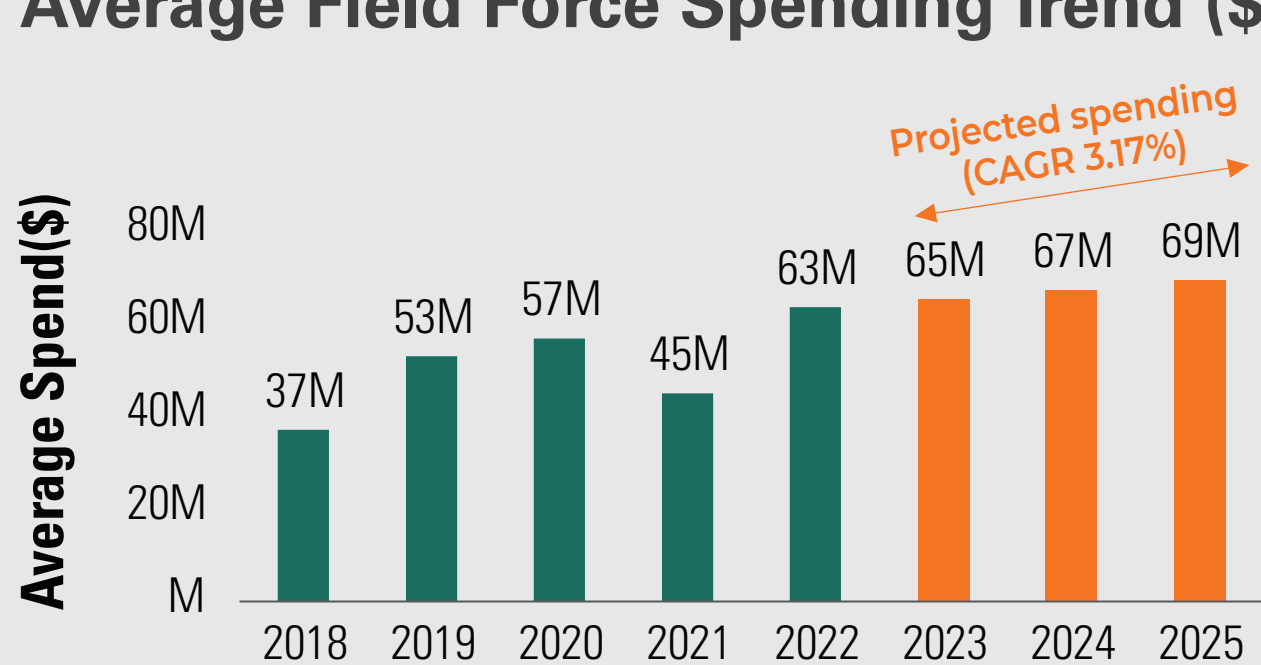
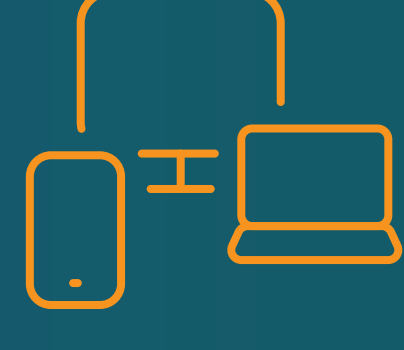


Figure 3: Average Field Force Spending Trend (\$)



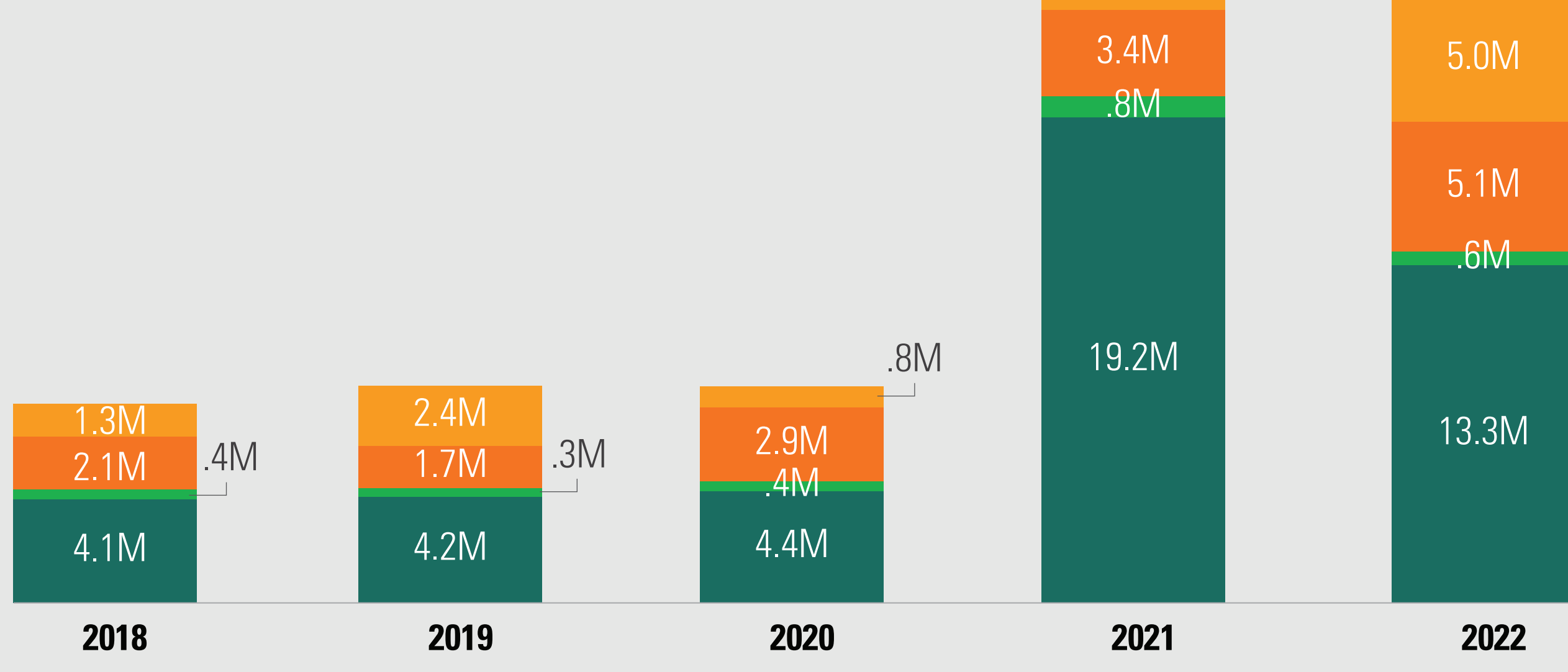
Source: Axtria's internal benchmarking data subject to the scope mentioned in this report.

- Digital marketing has grown significantly over five years.
- In 2021 and beyond, digital channels account for 22% of multichannel spending.
- TV advertising has retained a presence over the years.
- Digital channels are pivotal for future marketing strategies.



## TREND 2: PREFERENCE FOR DIFFERENT DIGITAL CHANNELS

Figure 4: Average Digital Spending (\$), 2018-2022 (based on the number of studies per channel)



Source: Axtria's internal benchmarking data subject to the scope mentioned in this report.

- Digital banner ad spending surged post-COVID.
- Social media and paid search are witnessing increased investment.
- Email communication remains valuable for reminders and general information dissemination.

## TREND 3: EFFECTIVENESS OF DIGITAL CHANNELS



Figure 5A: Shift In Digital Channel ROI, 2018-2022, Growth Brands (by ratio of impactable sales to channel spend)

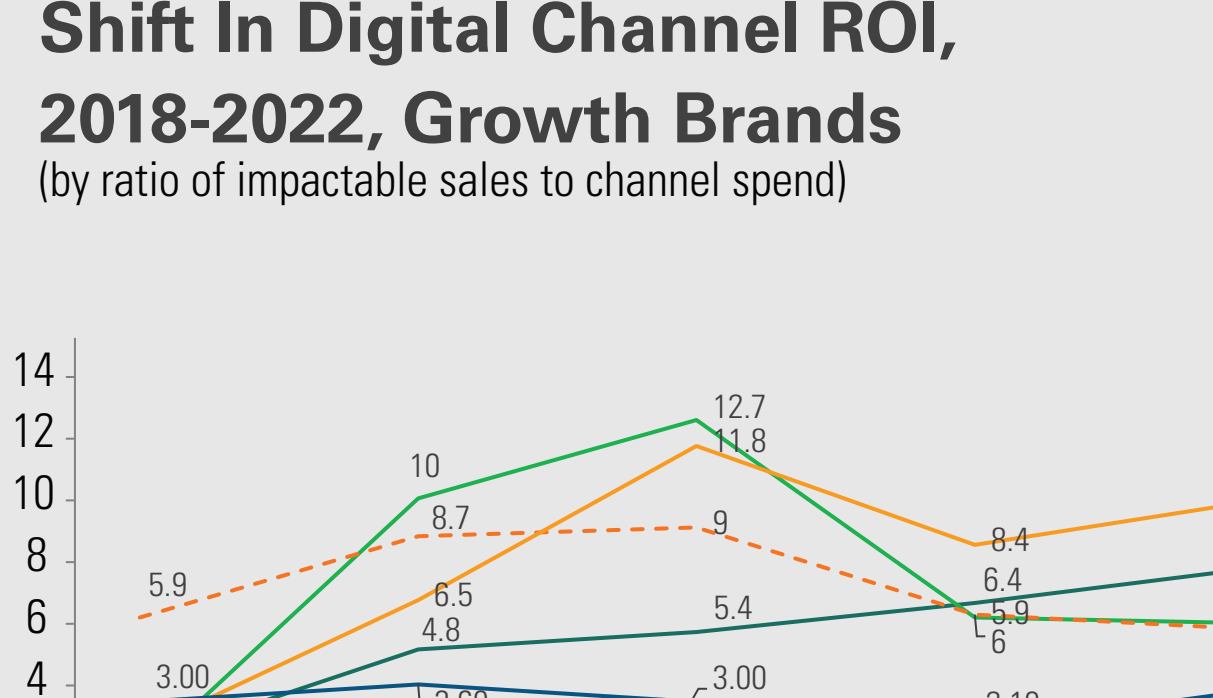
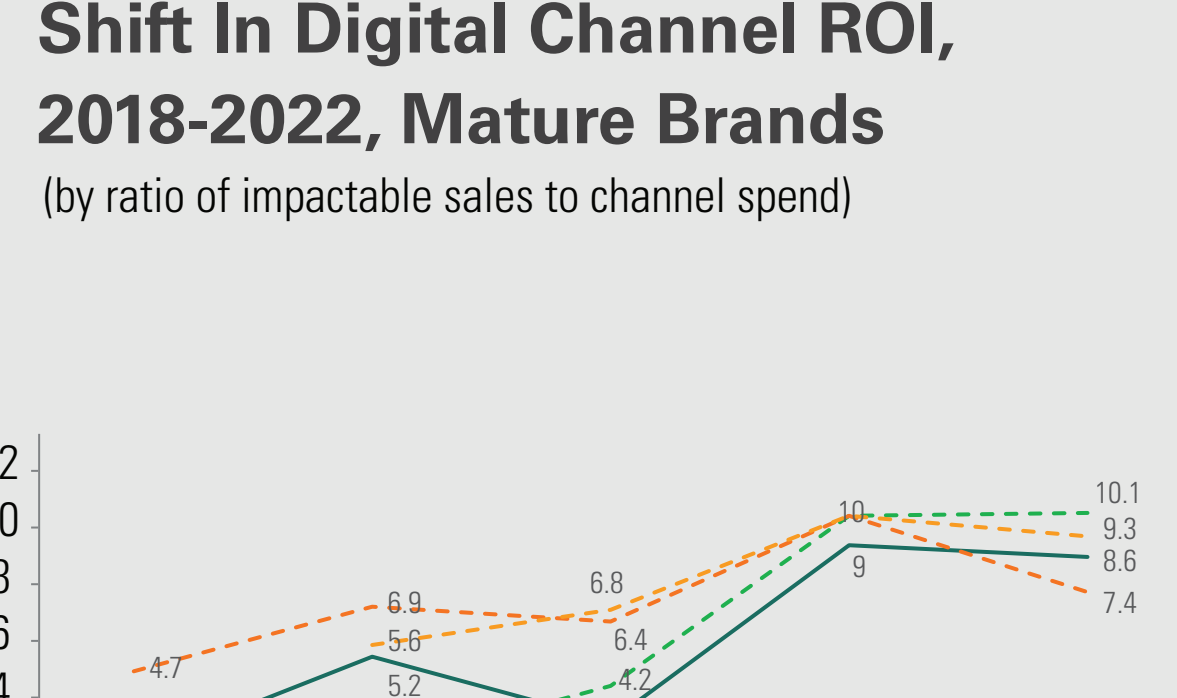


Figure 5B: Shift In Digital Channel ROI, 2018-2022, Mature Brands (by ratio of impactable sales to channel spend)



Source: Axtria's internal benchmarking data subject to the scope mentioned in this report.

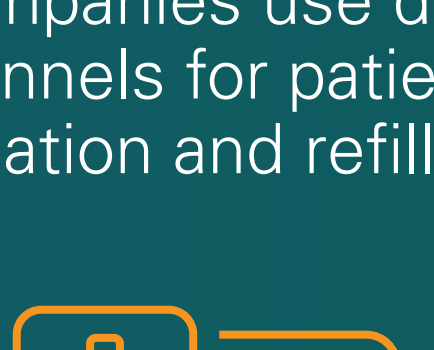
- HCPs are becoming more receptive to digital platforms.
- Email conversions with HCPs are improving.
- Engagement on social media is increasing.
- Digital data has a high value for data analysis and model building.
- The overall cost-effectiveness of digital channels, along with improved targeting and judicious budget allocation for mature brands, contributes toward a better ROI.

## TREND 4: SHIFT IN MARKETING OBJECTIVES

A higher emphasis on patient initiation over drug refills is emerging.

Companies use different channels for patient initiation and refills.

These changes have implications for budget allocation and ROI.



## WHAT DOES THIS MEAN FOR PHARMA COMPANIES?

- Embrace an omnichannel approach for future success in sales and marketing.
- Adapt to changing customer preferences and integrate digital platforms into strategies.
- Address marketing analytics challenges to gain valuable insights.
- Utilize product-based solutions to innovate and optimize MMx modeling.
- Blend high-level strategic thinking with granular tactical planning for a cohesive, engaging omnichannel experience.
- Stay flexible, adapt to the digital transformation era, and maximize returns.
- Successful implementation, combined with change management, enhances customer engagement and ROI.



Note: This infographic is representative of the complete study. Different KPIs may have been shown to different business units. For comprehensive benchmarks on all business units, please request a read-out of the complete study.