

POINT OF VIEW



INTOUCH  GROUP™

# THE HEALTH AND TECH TRENDS THAT WILL SHAPE PHARMA MARKETING IN 2019

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## Executive Summary

### The top trends that will shape healthcare in 2019

- Healthcare reform and pricing pressures
- Understanding the human inside the customer (patient or HCP)
- Telehealth and other more personalized types of care delivery
- Gene therapy
- Voice technology and personal assistants
- Data privacy and security
- AI inside

Intouch's annual trends report highlights the healthcare and tech trends that will shape the year ahead. You can look back and see our predictions for [2018](#), [2017](#), and [2016](#). And if you do, you might think — wait! Some of these trends look familiar from previous years!

If so — you're correct! And that should make sense to you. In fact, if you didn't notice that, we'd say there would be a problem.

Paradigm shifts don't happen overnight, or even within a year. They evolve over many years. The questions you should be asking yourself are:

- Where are these trends right now?
- What are you doing to address them where they are now?

Imagine if Ms. Pharma Marketer 1995 waited to see how that whole crazy website fad would pan out before finally building a brand.com? Or if Mr. Pharma Marketer 2005 decided that social media thing wasn't worth exploring until we had no more questions about it?

It's important to see the risks inherent in a wait-and-see attitude. By the time any large, meaningful trend is "done," and everything is understood, you can have missed priceless opportunities. Megatrends are not finite objects that will arrive at your door neatly packaged with a comprehensive manual. They're evolutions of how we live and work that are slowly interweaving themselves throughout all that we do.



01.

# HEALTHCARE REFORM AND PRICING PRESSURES

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Can you still call something a trend if it's been happening for 25 years? Well, if you can, healthcare reform will be the first to deserve it. Since the early 1990s, access to affordable healthcare in America has been making headlines. But we're going to see even more in 2019, as the price of pharmaceutical drugs continues to be one of the vanishingly few topics championed by politicians from all parties.

Some manufacturers have taken steps to voluntarily address concerns about pricing. Merck has begun publishing an annual [pricing transparency report](#) — and, as the *Philadelphia Inquirer* [reported](#), “its U.S. gross sales were reduced 45.1%, because of the rebates and discounts it gave to others in the supply chain.” Novartis decided not to raise any price in 2018. Pfizer [gained](#) a compliment from the president by announcing a hold on price hikes, but later announced it would be raising the prices of 41 drugs, or 10 percent of its product portfolio, effective January 2019.

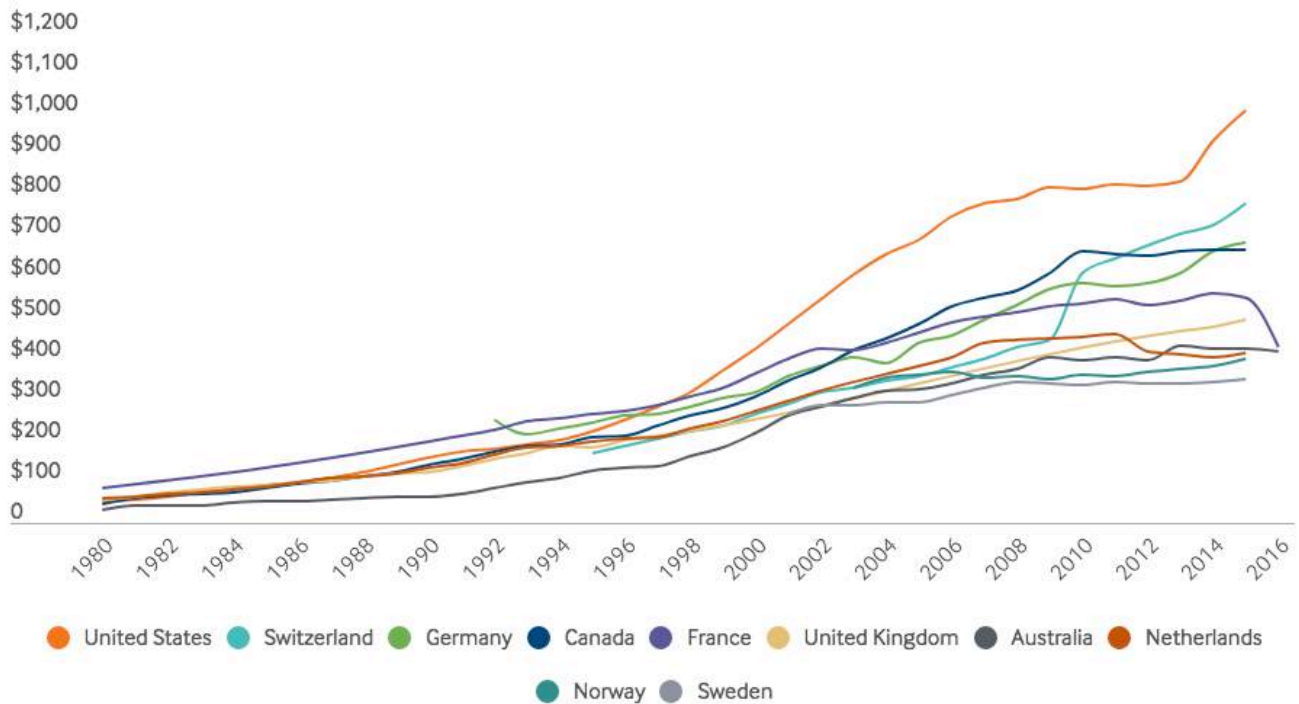
Government regulators and industry organizations aren't waiting for voluntary price transparency. On October 15, 2018, the Centers for Medicare & Medicaid Services (CMS) and the Pharmaceutical Research and Manufacturers of America (PhRMA) released two different mandates challenging pharma to provide drug pricing information to consumers. 2019 will see a new era as drug manufacturers begin listing — or pointing to — pricing in their DTC advertising.

**SO WHAT?**

- How can your brand be telling the story of how pharmaceutical innovation changes and saves lives?
- How can your brand be promoting ongoing industry, company, and brand efforts to improve access and clearly communicate pricing?

## National Trends in Per Capita Pharmaceutical Spending

1980–2015





# THE PRICE OF PHARMACEUTICAL DRUGS CONTINUES TO BE ONE OF THE VANISHINGLY FEW TOPICS CHAMPIONED BY POLITICIANS FROM ALL PARTIES.

## INTOUCH SAYS ...

*For the next 5-10 years, pharma/healthcare is going to be influenced by ... “uncertainty around our country’s insurance and healthcare system.”*

– Becca Wilson, Senior Strategic Planner

*“The healthcare space is crowded with payers, HCPs and patients all asking, ‘Is this treatment worth the money compared to a similar offering?’”*

– Aaron Uydess, EVP, Customer Experience and Analytics

*You’ll be behind if you’re not talking about ... “clearer, cleaner ways to calculate marketing ROI.”*

– Tina Iglesias, Group Director, Strategic Planning



## READ MORE

- [Copoly Accumulator Programs: Cost Shifts and Unintended Consequences](#)
- [Sharing Drug Pricing With Consumers: An Intouch Primer](#)
- [The 2019 Formulary Exclusion List Season Is Here – Get Smart for Yourself and Your Brand](#)
- [Drug Pricing in Ads: It’s Not Over Yet](#)



02.

# UNDERSTANDING THE HUMAN INSIDE THE CUSTOMER

PATIENT OR HCP

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## ABOUT THIS TREND

Patients are humans. They pick up the kids. They stop for takeout on Friday nights. They worry about the bills and the laundry. They don't cease to exist the moment they step off an exam table or outside of a waiting room.

Healthcare professionals are also humans. They text their friends. They grieve those who succumb to disease. They wonder how they're ever going to get it all done.

In the sometimes-complicated world of stilted conversation mediated by MRL committee and HIPAA regulation, fax machine and hand-scribbled forms, it can be easy to forget that our brands' customers aren't *The Patient and The HCP*. They're our neighbors, our relatives, ourselves.

## SO WHAT?

- Take a step back from the market research and segmenting, the profiles and deciles, to consider the humans you hope to connect with. To make an impact, address the human, not the target profile.

## INTOUCH SAYS ...

*"Culture' is the way people live, the 99.9% of the time that they're trying to be normal human beings and not patients with a disease."*

– Michael Pruskowski, SVP, Strategic Planning

*My clients are being kept awake at night wondering ... "how best to spend their dollars effectively."*

– Aaron Uydess, EVP, Customer Experience and Analytics

*"Knowing and using behavioral economics to our advantage is still not being done well across the industry."*

– Tina Iglesias, Group Director, Strategic Planning



READ MORE

- [Can Pharma Stop Prescribing? Human-Centered Design in Pharma Marketing](#)
- [Predictable Irrationality: Behavioral Economics in Pharma](#)
- [Behavioral Economics: A Marketer's Best Friend](#)



**PATIENTS ARE HUMANS.  
HCPs ARE ALSO HUMANS.**





03.

# TELEHEALTH AND OTHER MORE PERSONALIZED TYPES OF CARE DELIVERY

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## NEW TELEHEALTH APPLICATIONS, OFTEN DRIVEN BY AI, ACT AS A VIRTUAL DOCTOR AND HEALTH COACH, PROVIDING VITAL HEALTH INFORMATION TO EVERYONE, EVERYWHERE, 24/7

Payers, providers, and patients are all discovering that the one-size-fits-all doctor visit isn't the only option — and may not always be the most efficient and effective mode of care delivery. From clinics in offices, pharmacies and grocery stores to apps like MDLive, Doctor on Demand, or Amwell, telehealth and other types of nontraditional interactions with HCPs are increasing.

Not all of the specifics have been ironed out, but regulation is standardizing and increasing. Thirty-four states and Washington, DC already have laws that [require](#) payers to cover telehealth the same way they cover in-person services. And 49 states and DC already [reimburse](#) for Medicare video consultations.

Nearly all telehealth today is staffed by live, licensed HCPs, but in the future, we expect algorithm-driven responses to take on a greater role in helping manage volume and triage. Even today, though, we can begin to think bigger than the office, investigating ways to reach patients and HCPs that complement traditional exam-room interactions.

### SO WHAT?

- One quote from the American Medical Association and Wellness Council of America [states](#) that nearly 75% of HCP, urgent-care, and ER visits “are either unnecessary or could be handled safely and effectively over the phone or video.” Are your target HCPs overtaxed?
- A RAND Corporation study of the claims data of 300,000 patients [found](#) that 12% of telehealth visits replaced visits to other providers — but, “the net annual spending for acute respiratory illness increased \$45 for each telehealth user because of increased utilization (in other words, they may be receiving care that they would otherwise have skipped due to the increased convenience of a telemedicine visit).” How could increased utilization of care help your patients?
- Intouch clients are piloting telehealth efforts to investigate their utility in helping drive awareness and conversations between patients and HCPs.



**INTOUCH SAYS...**

*“Now that telehealth is reimbursed by most government and private insurers, the floodgates will open for a fundamental change in the way healthcare is accessed by tens of millions of Americans.”*

– Peter Weissberg, VP, Market Access

*“New telehealth applications, often driven by AI, act as a virtual doctor and health coach, providing vital health information to everyone, everywhere, 24/7. Rather than travel hours to the nearest hospital, or rely on questionable health information found via Google, people are using telehealth to get immediate, accurate health guidance.”*

– Joe Doyle, SVP, Strategic Development; Member, South by Southwest Board of Advisors for Health and MedTech

*“Telehealth could be as simple as texting your HCP – or it could be as complex as multi-disciplinary case-based videoconferencing, or remote robotic surgery.”*

– Tina Iglesias, Group Director, Strategic Planning



**READ MORE**

- [Intouch Benefits Include Telehealth Coverage](#)



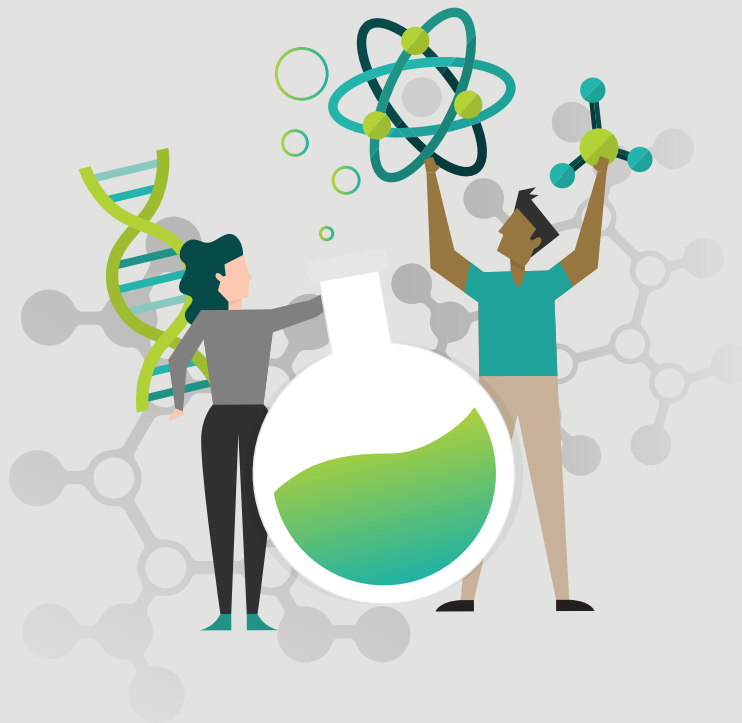
**PEOPLE ARE USING TELEHEALTH TO GET IMMEDIATE, ACCURATE HEALTH GUIDANCE.**



04.

# GENE THERAPY

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## TODAY, GENETIC PROFILES ARE A STOCKING STUFFER. THE SCIENCE HAS BEEN ACCELERATING AT AN UNBELIEVABLE PACE.

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Genetics was once a rarefied field that the public knew little of. Today, genetic profiles are a stocking stuffer. The science has been accelerating at an unbelievable pace.

The Human Genome Project was completed in 2003 and cost billions. Today, a 23andMe kit (with free holiday gift wrap) is \$69 and takes 6-8 weeks to receive results. Certainly, they're exponentially different in terms of breadth and complexity. But genomics has become everyday to a degree that would have been difficult to imagine just a generation ago.

Gene therapy came onto the U.S. market in 2017 with the approvals of [Kymriah](#) (tisagenlecleucel) and Yescarta (axicabtagene ciloleucel). These two chimeric antigen receptor T-cell therapies (better known as CAR-T) work by collecting patients' own immune cells, genetically modifying them, and infusing them back into the patient.

FDA Commissioner Scott Gottlieb, M.D., [called](#) these approvals “a new frontier in medical innovation.” In 2018, a new gene therapy was approved in the United States for an eye disease (Luxturna [voretigene neparvovec-rzyl]) – and many more are being studied for many more conditions, including HIV.

CRISPR is another hot term, related more to the “cut” than the “paste” of gene therapy. CRISPR-Cas9 genome editing technology makes it possible to edit genes inside organisms.

And, of course, in late 2018, Chinese scientist He Jiankui [announced](#) to the Summit on Human Genome Editing that he had genetically modified two embryos, which had already been born as healthy baby girls. Major ethical concerns from throughout the scientific community immediately met this announcement, and his research is under investigation.



## SO WHAT?

- Chances are, you don't work on a CAR-T brand. But in the same way that gene therapy is opening new frontiers, a new treatment modality could change any disease state at any time. Are you keeping abreast of research underway in the disease states your brands address?

## INTOUCH SAYS...

*"Over the next 5-10 years, gene therapy is going to be a major influence on healthcare."*

– Peter Weissberg, VP, Market Access



**CRISPR IS ANOTHER HOT TERM, RELATED MORE TO THE "CUT" THAN THE "PASTE" OF GENE THERAPY.**

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05.

# VOICE TECHNOLOGY AND PERSONAL ASSISTANTS

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## ABOUT THIS TREND

Natural language processing is one of the holy grails of artificial intelligence (AI): the ability for a computer system to understand conversational speech and reply usefully.

This technology is what powers voice-controlled assistants – from the Siri in your iPhone, to the Alexa in your Dot, to the Google in your Google Home. They tell us the weather, run through our appointment calendar, give us directions, and play our music. But increasingly, they'll help us do our shopping, be our source for news, keep us connected to our loved ones, and do much more.

## SO WHAT?

- As a recent *Forbes* headline [put it](#), “Hey Google, how do I optimize for voice search?” Even if your brand isn't exploring voice technology in your marketing, you should be adjusting your current content to optimize for voice search. [According](#) to Gartner, nearly one-third of searches will be done by voice by 2020. [According](#) to comScore, it's one-half. That's just over 12 months away. Will those searchers find you?
- Consider whether your brand could help your HCPs, your patients, or their caregivers, with voice functions. A reminder, an encouragement, or a connection could all be powerfully conveyed with a personal voice assistant.

## INTOUCH SAYS ...

*“As usage increases, voice technology can serve as a pivotal educational component for patients who may otherwise struggle to get the help and support they need.”*

– Becca Wilson, Senior Strategic Planner

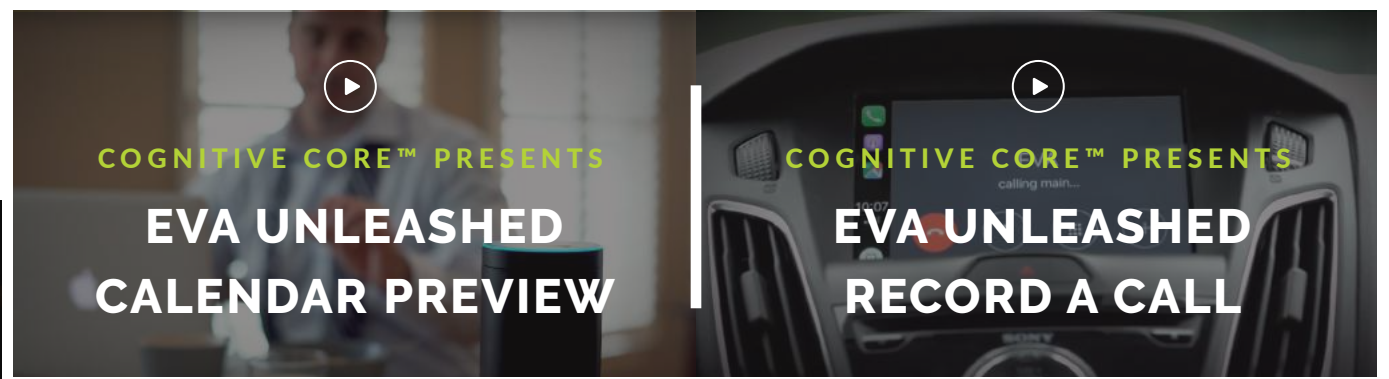
*“We'll see virtual assistants continue to help us in our daily lives.”*

– Linda O'Neill, Director, Innovation Program Management



## READ MORE

- [Artificial Intelligence and the Future of Rep Visits](#)
- [Voice Search: What It Changes – and Makes Possible](#)
- [With Amazon Echo, All You Have to Do Is Ask](#)





06.

# DATA PRIVACY AND SECURITY

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### Data privacy and security was big news in 2018, and the trend isn't going away.

- In March, the public became aware of a major misuse of consumer data by consulting firm Cambridge Analytica; the data was surreptitiously collected via Facebook.
- In May, the European Union's (EU's) General Data Protection Regulation (GDPR) went into effect, adding a new framework of regulations, restrictions, protections – and potential penalties – for the personal data of EU citizens. GDPR is enormous in scope and in its effects on many industries.
- In the United States, the California Consumer Privacy Act (CCPA), which goes into effect in January 2020, is less all-encompassing than GDPR, but is still considered to be the most comprehensive law of its kind so far in the country.

But of course, patient data privacy is only one of the data-security challenges facing pharma companies. From lost intellectual property to ransomware cyberattacks, data breaches can wreak havoc in any number of ways.

In 1837, French physician Pierre Charles Alexandre Louis, the inventor of the precursor to the modern clinical trial, said, "Without the aid of statistics, nothing like real medicine is possible."

The more data we have, and the more connections we can make among those data points, the more insights we can act upon to improve our work. However, that volume of data offers that many more opportunities for data breaches.

Fortunately, those of us in the life sciences are already accustomed to protecting information. Working with sensitive information about patients, confidential information about investigational compounds, and complying with all necessary medical, legal, and regulatory restrictions has made all good pharma marketers extremely sensitive to the care that must be taken.

#### SO WHAT?

- Are you sure that all your vendor partners are as well versed as you are in the best ways to collect and safeguard data?
- Are your agencies and partners helping you prepare for new data privacy and security regulations going into effect?

#### INTOUCH SAYS ...

*"Orchestrating and managing data is keeping my clients up at night. Privacy concerns about data collection and targeting will be a large influence on marketing and advertising for the next 5-10 years."*

– Becca Wilson, Senior Strategic Planner



#### READ MORE

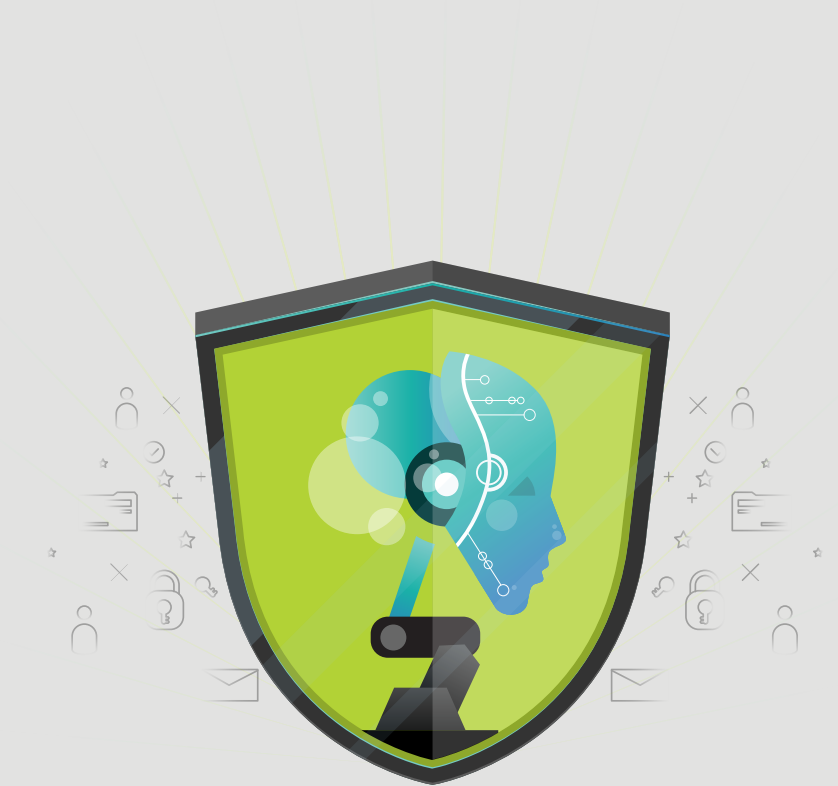
- [Should Pharma Care About California's New Data Privacy Law?](#)
- [GDPR – What Does It Mean for Display Media?](#)
- [Cambridge Analytica Scandal: Don't Blame Facebook. Blame Bad Ethics](#)
- [In Case You Missed It: Catch Up on Data Analytics](#)



07.

# AI INSIDE

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The topic of artificial intelligence deserves much more than a brief mention here. In fact, we “wrote the book” about it with the Digital Health Coalition! Go to [www.modernpharmamarketing.com](http://www.modernpharmamarketing.com) to access the interactive ebook we published earlier this year.

In it, we discuss “everyday AI” – the concept that we will slowly notice the technology in our lives being able to assist us more: to give us better predictions, to be able to do more with less instruction. This relates back to the executive summary: AI isn’t a discrete thing that will arrive, but a paradigm shift that is slowly spreading through everything we do.

Whether it’s customer service chatbots, search engine optimization, sales rep enablement, predictive personalization, or patient-assistive services like verifying insurance, booking appointments, or filling out forms, AI is already changing the world in subtle and not-so-subtle ways. And we’re coming to depend on it, as marketers and as consumers.



[MODERNPHARMAMARKETING.COM](http://MODERNPHARMAMARKETING.COM)

#### SO WHAT?

- AI allows for stronger, more adaptive marketing that’s more efficient and effective and can have more assurance of compliance. That’s a combination that’s hard to beat.
- But even if you aren’t using AI to execute brand marketing, you must understand how data is being used to make clinical decisions. How will you prepare and respond as algorithms increasingly become influencers?
- Modern pharma marketers will have to become increasingly adept at understanding how data is identified, collected, shared, analyzed, interpreted, and acted upon. This may sound like it’s a data issue – but really, understanding data and understanding AI are inextricable. (That’s why we wrote our [book](#) to help you!)

#### INTOUCH SAYS ...

*“Intouch is shaping the future of AI in pharma as we continue to identify how modern marketing can help our clients: where they are now, and where they need to go in the future.”*

– Justin Chase, EVP, Innovation and Media

*“We’ve been implementing real AI chatbots for clients – and that’s awesome – but AI holds the promise to be so much more than a customer service chatbot for pharma.”*

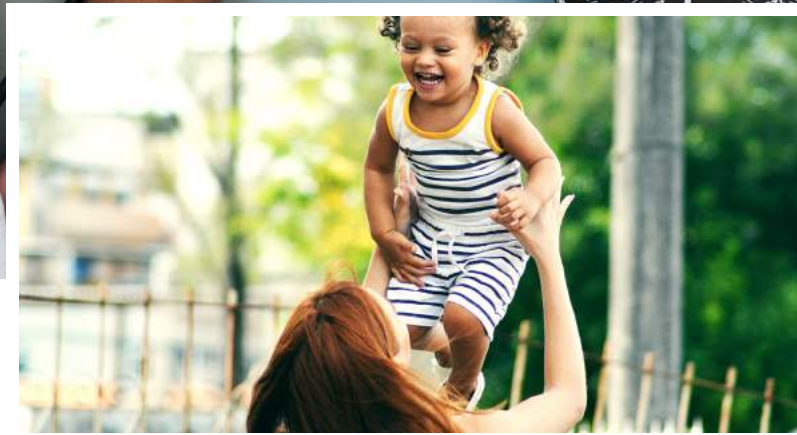
– Wendy Blackburn, EVP, Marketing & Communications



[READ MORE](#)

- [Artificial Intelligence and the Future of Rep Visits](#)
- [Intouch Hosts AI Masterclass at 2018 Frontiers Health Conference](#)
- [Intouch Innovates: Artificial Intelligence in Healthcare](#)
- [FDA Approves AI Device in an Industry First](#)





## CONCLUSION

The trends we expect to see affecting life sciences marketing in 2019 are driven by science, by technology, by politics, and by the human reaction to these forces in our lives. How HCPs understand, diagnose and treat disease and interact with patients; how we all interact with technology, and how it informs our understanding of health; and how the industry interacts with national and international regulators to provide access: these are the paradigms in which we must prepare to shape change.

## THE RESPONDERS



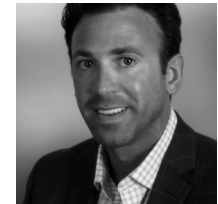
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