

7th Annual

2019 SURVEY REPORT MARKETING TRENDS

in the Life
Sciences Industry



The Health Science *Experts*

SCORR
MARKETING

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OBJECTIVE

SCORR Marketing recently conducted our seventh annual survey assessing marketing trends in the life sciences industry. The survey is conducted to gain a better understanding of how and where companies spend their marketing budgets, which tactics perform best, and how their agencies are performing.

These insights can be a valuable resource to life science marketing professionals to benchmark their marketing spending and performance in comparison to other companies in the industry.

METHODOLOGY

SCORR Marketing developed the questions and used a web-based tool to administer the survey. Participants were recruited by email from SCORR's own database as well as from industry databases of marketing communications professionals. The survey was fielded from Sept. 4, 2019, through Sept. 27, 2019.

SCORR opened the survey for the first time to respondents from biopharmaceutical and medical device companies. About 73% are respondents working at CROs and other pharma services companies; the remaining 27% are from sponsor companies.

PRESENTATION OF DATA

Topline results are presented for each survey question. SCORR Marketing also analyzed survey results across company types, and we also examined results year-over-year, looking specifically at drug development services companies (DDS), a category that excludes sponsors. We have included our observations in this report.



SUMMARY

Introduction

For the past seven years, SCORR Marketing has conducted a survey assessing marketing trends in the life sciences industry to stay abreast of emerging developments. The survey results provide valuable information about marketing spend, specific tactic performance, and overall agency performance.

As HubSpot has noted, “The marketing world is dynamic and ever-changing — **trends, technology, and tactics are never stagnant.**”¹ The importance of keeping up with industry marketing trends cannot be overstated. To do this well, companies need to look at two things: their competitors and their market.

Regarding the first item — competitors — one of the findings of this report is that 75% of respondents say their companies regularly analyze their competitors. While this is encouraging, it suggests that many more companies could substantially improve their market intelligence and competitiveness by performing this important task.

As for the second item — the life sciences market — this survey report provides life science companies information upon which to compare to their own marketing programs. The following provides a look at some of the critical results that will be useful for companies seeking to benchmark their marketing efforts.

Marketing Goals and Spending

No. 1 goal: generating revenue

For life sciences companies, generating revenue is the most important goal — and has been for three years straight. Client retention, which topped the list previously, remains high in importance.

Budget size: varies

Marketing budgets vary widely: About one-quarter (26%) of respondent companies allocate 1% or less of their annual revenue to marketing budgets while a little more than one-fifth (21%) earmark 5% or more.

Biggest expense: trade shows

Trade shows take up the biggest share of marketing budgets — but less so than they have in years past.

Percentage of DDS Companies Allocating 40% or More Toward Trade Shows	
2018	2019
51%	29%

Trade show metrics: lead generation

To define success, 82% of our respondents look at lead generation and 72% regard the number of client meetings gained as an indicator of success. Because trade shows often comprise a larger share of the budget of companies with proportionally smaller marketing budgets, pre-planning is essential for these companies to maximize the return on investment. [Read our blog to learn how to optimize your trade show ROI.](#)²

Annual planning: important for 69% of companies

In 2019, just 69% of companies reported developing annual marketing plans while only 45% develop annual communications plans. A best practice is to maintain a flexible plan that allows you to plan, review, assess, and adjust your strategy and tactics to ensure you deploy those that garner you the most success. [Learn how to build an annual marketing plan.](#)³



SUMMARY

Digital: What's Working Best

Digital analytics: Measured by two-thirds of companies

Digital ads are expected to account for **nearly half** of all advertising budgets worldwide by 2020.⁴ It only makes sense, therefore, for companies to analyze their tactics to ensure they are maximizing their investment. However, one-third of life science companies fail to take this basic step.

Websites: Updated this year by eight out of 10

In the past year, 80% of life science companies updated website content, according to our survey. To maximize this foundational piece of your marketing program, we recommend you evaluate your website even more often.

A 2018 HubSpot survey found that 61% of marketing professionals named **improving SEO and growing their organic presence** as what they most want to accomplish.⁵ With Google releasing thousands of algorithms each year — **3,200 last year alone**⁶ — both keyword maintenance and optimizing Google Ads' pay-per-click campaigns are growing in importance. By evaluating website performance regularly, marketers can make the adjustments sooner that will drive traffic and conversions.

Digital satisfaction: Up slightly

Drug development services companies rated their digital marketing an average of 3.81 on a 5-point scale in 2019 — marginally higher than last year.

Marketing automation: Deployed by 45% of companies

Only 45% of respondents use marketing automation to manage their digital marketing.

Best performing digital tactic: Webinars

In order, the top performing digital assets were reported to be webinars, white papers, social media, case studies, and pay-per-click advertising. Companies with larger budgets, as a percentage of revenue, also cited video as a top performing asset.

Social media: Up and up

In line with increasing social media usage in the U.S. population overall, social media advertising in the life sciences continues to trend up — from 49% in 2015 to 62% this past year.

Companies with proportionally smaller marketing budgets value social media more than any other tactic. While social media consumed a smaller percentage of budgets than other tactics, this is likely due to its cost-effectiveness and that 75% of respondents handle this activity internally.

LinkedIn is considered the most effective platform and is the one most used daily.



SUMMARY

Agency Usage and Performance

Level of outsourcing: Ebbs and flows

The economy, mergers and acquisitions, new product and service releases, staffing changes, and many other factors influence outsourcing decisions. While the use of external marketing agencies is lower this year, if we look at the picture over the past seven years, we see that the level of outsourcing fluctuates from year to year.

Needed most: Marketing and life science expertise

For companies that hire external marketing support, marketing expertise and life science expertise are most important. Price comes in third — signaling that affordability is still an important factor in decision making.

Tactic outsourced most: Interactive projects

Companies most often seek support for websites, apps, and other interactive development projects, with 58% of our respondents outsourcing at least some of this work. Other frequently outsourced areas include advertising, market research, and content creation.

Not surprisingly, companies with proportionally fewer resources seek outside support more frequently than companies with larger marketing budgets in all areas except for two: They tend to keep advertising and social media tactics in house.

Satisfaction with agency: Up and down

The number of companies that have expressed they are either completely or mostly satisfied with their marketing agency's performance has fluctuated in recent years, from 55% in 2017 to 65% in 2018 and back to 48% in 2019.

The average ratings for agency marketing expertise (3.65 on a 5-point scale) and life sciences expertise (3.52) both point to opportunities for improvement, which could also improve retention rates.

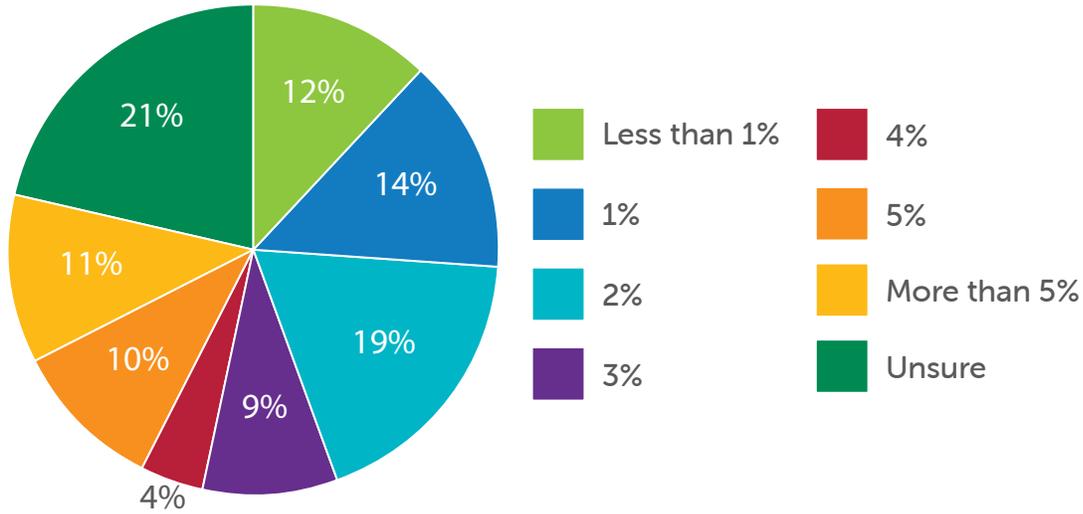
There is a similar opportunity when it comes to trade show planning, especially planning on behalf of companies with proportionally smaller marketing budgets. Agency performance ratings for trade show planning increased from 2015 to 2018 before taking a step back in 2019.



MARKETING DEPARTMENT INVESTMENT, GOALS, AND ACTIVITIES

Approximately what percentage of your company's annual revenue is your annual marketing budget?

Marketing budgets, as a proportion of a company's total revenue, vary widely.



Marketing Budget as a Percentage of Revenue	CROS	OTHER PHARMA SERVICES	SPONSORS
1% or less	33%	21%	20%
5% or more	14%	23%	24%



MARKETING DEPARTMENT INVESTMENT, GOALS, AND ACTIVITIES

What percentage of your marketing spend goes toward each of the following areas?

Companies spend the largest proportion of their marketing budget on trade shows. Collateral, social media, and public relations make up the smallest identified portions.

- When we look only at drug development services companies, 29% allocate more than 40% of their marketing spend to trade shows, compared to 51% in 2018.
- Forty-nine percent allocate more than 10% on advertising. CROs invest less in advertising than other pharma services companies.
- Fifty percent of sponsors devote at least 20% of their budget on content creation. They invest more on content creation than do drug development services companies.

Area	0 TO 10% OF BUDGET	11 TO 20% OF BUDGET	21 TO 40% OF BUDGET	41 TO 60% OF BUDGET	61 TO 100% OF BUDGET
Advertising	51%	20%	13%	6%	3%
Collateral	50%	27%	8%	0%	0%
Content creation	33%	34%	18%	6%	1%
Market research	64%	13%	4%	4%	0%
Public relations	56%	22%	5%	1%	2%
Social media	58%	26%	9%	1%	1%
Trade shows	18%	15%	34%	22%	4%
Website/app/ interactive development	39%	32%	13%	8%	1%

Marketing Spend Area That Exceeds 20% of Budget	CROS	OTHER PHARMA SERVICES	SPONSORS
Advertising	17%	38%	31%
Content creation	29%	28%	50%
Trade shows	74%	58%	73%
Website/apps/ interactive development	77%	30%	15%



MARKETING DEPARTMENT INVESTMENT, GOALS, AND ACTIVITIES

How important are each of the following marketing goals to your company? (on a 1-5 scale, with 1=least important and 5=most important)

Revenue generation, client retention, and brand perception were the most important marketing goals while lead nurturing and lead generation were the least important.

- CROs value revenue generation more than brand perception while sponsors value brand perception more than revenue generation.
- Companies that have a marketing budget of 5% or more of their revenue to marketing spend value revenue generation more than brand perception. Companies with proportionally lower marketing budgets express a slight prioritization for brand perception.

Goal	5	4	3	2	1	AVG. RATING
Revenue generation	66%	17%	8%	4%	4%	4.40
Client retention/loyalty	60%	24%	9%	6%	1%	4.37
Brand perception	58%	28%	7%	4%	3%	4.35
Brand awareness	52%	32%	8%	4%	4%	4.25
Engagement	42%	33%	20%	4%	0%	4.15
Lead generation	43%	26%	15%	8%	7%	3.92
Lead nurturing	29%	36%	19%	8%	6%	3.76



MARKETING DEPARTMENT INVESTMENT, GOALS, AND ACTIVITIES

How long has it been since your company last updated the following?

Most companies have updated their website content in the past year.

- In the past year, 80% of respondents have updated their website content, 77% have updated their marketing materials, and 73% have updated their trade show booth/materials.
- Fifty-eight percent of companies did not rebrand in the past year.
- Though fewer DDS companies updated their website content in 2019 (78%) than in 2018 (81%), more of them updated their website design in 2019 (62%) compared to 2018 (53%).

Item	1 YEAR	2 YEARS	3 YEARS	4 YEARS	5+ YEARS
Website content	80%	10%	5%	0%	2%
Marketing materials	77%	9%	6%	1%	1%
Trade show booth/materials	73%	5%	9%	0%	2%
Website design/layout	67%	16%	6%	3%	5%
Overall brand image (rebrand)	42%	14%	11%	9%	18%

Item Updated in Past Year	2018 DDS COMPANIES	2019 DDS COMPANIES
Website content	81%	78%
Marketing materials	81%	74%
Trade show booth/materials	69%	69%
Website design/layout	53%	62%
Overall brand image (rebrand)	39%	40%



MARKETING DEPARTMENT INVESTMENT, GOALS, AND ACTIVITIES

Which of the following activities does your company engage in?

Not all companies engage in key strategic activities such as regularly analyzing their competitors or developing annual plans.

- Non-CRO pharma service companies are most likely to use marketing automation (63%).
- Companies that have a marketing budget of 5% or more of their revenue are much more likely to regularly seek feedback from their clients than are those companies that have a proportionally lower marketing budget.

Activity*	YES	NO
Regularly analyze your competitors	75%	23%
Develop an annual marketing plan	69%	30%
Use analytics to make marketing decisions	67%	28%
Regularly seek feedback from your clients on ways to improve	66%	29%
Use marketing automation	45%	47%
Develop an annual public relations/communications plan	45%	49%

*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."

Activity (% Yes)	CROS	OTHER PHARMA	SPONSORS
Regularly analyze your competitors	71%	74%	80%
Use marketing automation	41%	63%	20%
Develop an annual public relations/communications plan	32%	54%	56%

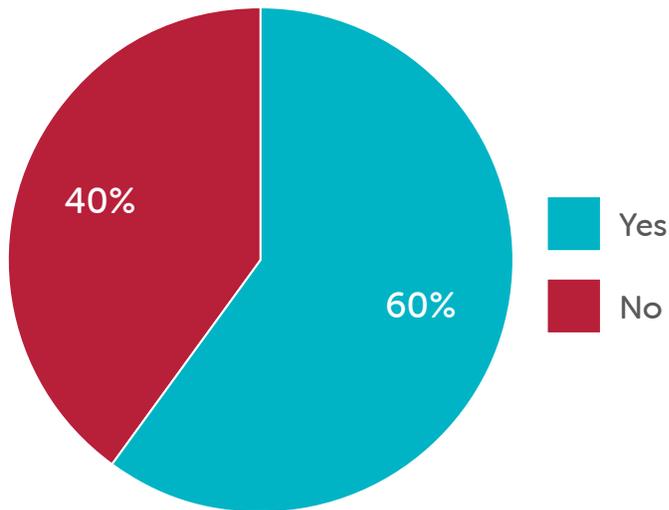
Activity (% Yes)	MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
Regularly seek feedback from your clients on ways to improve	48%	73%



AGENCY UTILIZATION AND SATISFACTION

In the last year, have you contracted any work through an external marketing agency?

A majority of respondents (60%) said their company worked with an agency in the past year.



% That Work With an Agency		
CROS	OTHER PHARMA SERVICES	SPONSORS
49%	65%	73%

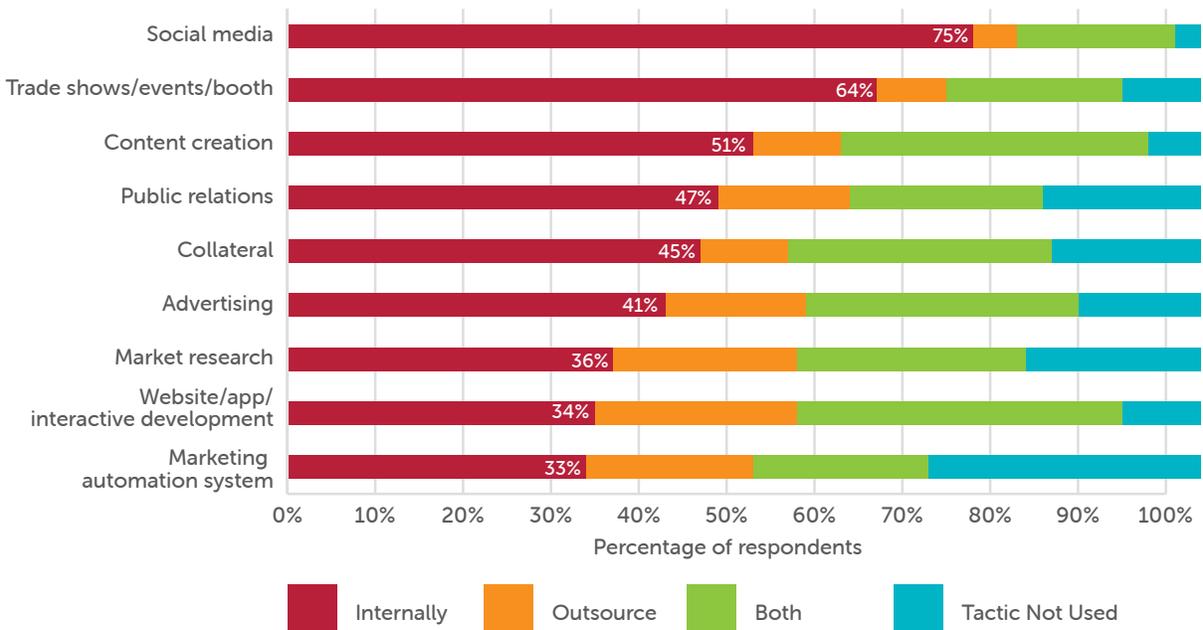


AGENCY UTILIZATION AND SATISFACTION

How do you primarily handle each of the following areas?

More than half of all companies (58%) outsource at least some of their website/app/interactive development.

- Almost half of all companies outsource market research (45%), advertising (45%), or content creation (44%).
- Companies that have a marketing spend of 5% or more of their revenue are much more likely to outsource advertising functions and less likely to outsource trade shows than companies that spend less on marketing as a percentage of revenue.



Area	CROS	OTHER PHARMA SERVICES	SPONSORS
Content creation	26%	43%	64%
Public relations	26%	38%	40%
Website/apps/interactive development	47%	57%	72%

Area Outsourced*	MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
Trade shows/events/booth	37%	14%
Advertising	30%	50%

* Percentages include companies that completely and only partially outsource that activity.

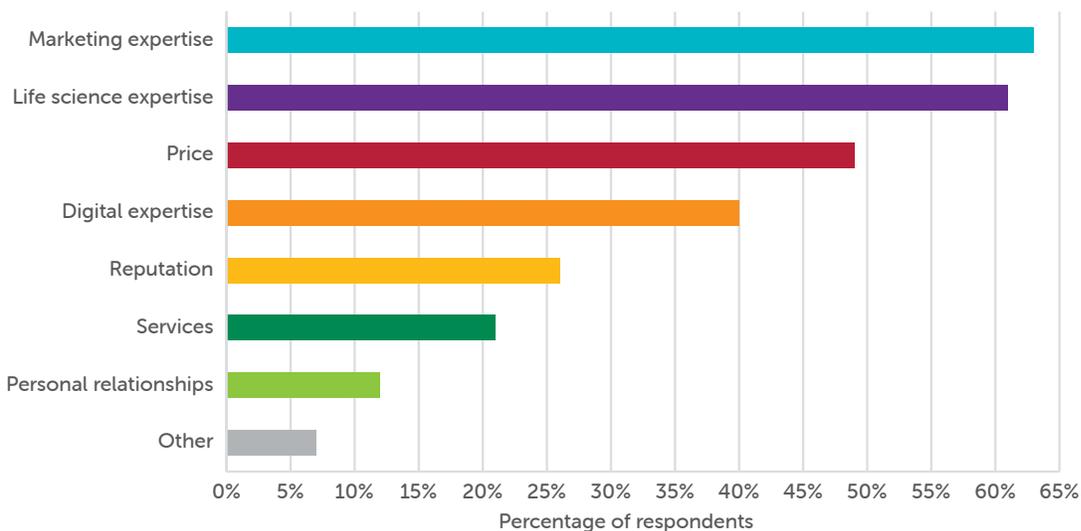


AGENCY UTILIZATION AND SATISFACTION

What are the top three attributes you look for when selecting a marketing firm? (Select up to three attributes.)

Above all else, companies value expertise.

- The top two attributes sought when selecting a marketing firm are marketing expertise (63%) and life science expertise (61%).
- Sponsors and CROs identify life science expertise as a top-three attribute about twice as often as other pharmaceutical services companies.
- Life science expertise is valued highly by companies with proportionally smaller marketing budgets while digital expertise is what companies with larger budgets are looking for.



Percentage Identifying Digital Expertise as a Top-Three Attribute	
2018 DDS COMPANIES	2019 DDS COMPANIES
27%	40%

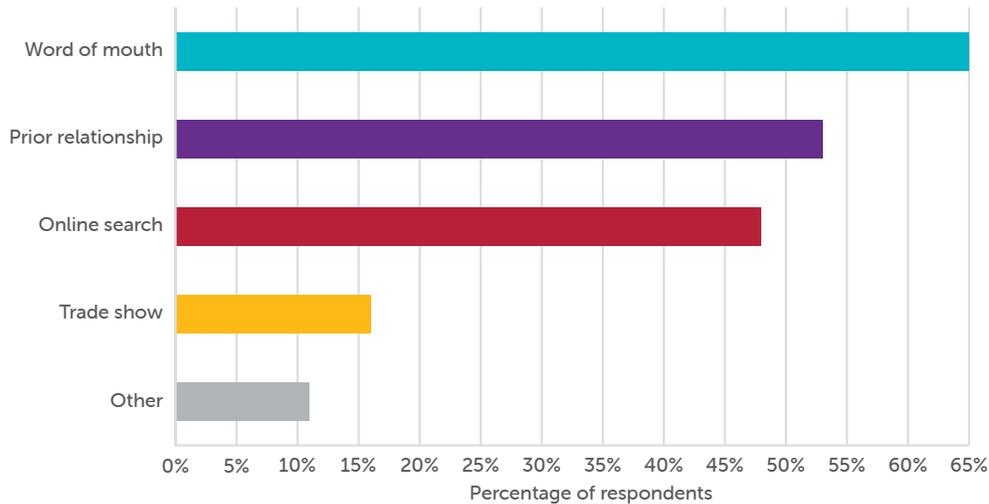


AGENCY UTILIZATION AND SATISFACTION

How do you look for a new marketing agency? (Select all that apply.)

Relationships matter more than promotion when it comes to how companies look for a new marketing agency.

- When looking for a new marketing agency, 65% of respondents use word of mouth and 53% rely on a prior relationship.
- Those companies with marketing budgets of 1% or less of revenue are considerably more likely than companies with proportionally larger budgets to identify word of mouth, prior relationship, or online search as ways they look for a new marketing agency.



How Respondents Look for an Agency	MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
Word of mouth	68%	59%
Prior relationship	60%	45%
Online search	64%	45%
Trade show	12%	18%

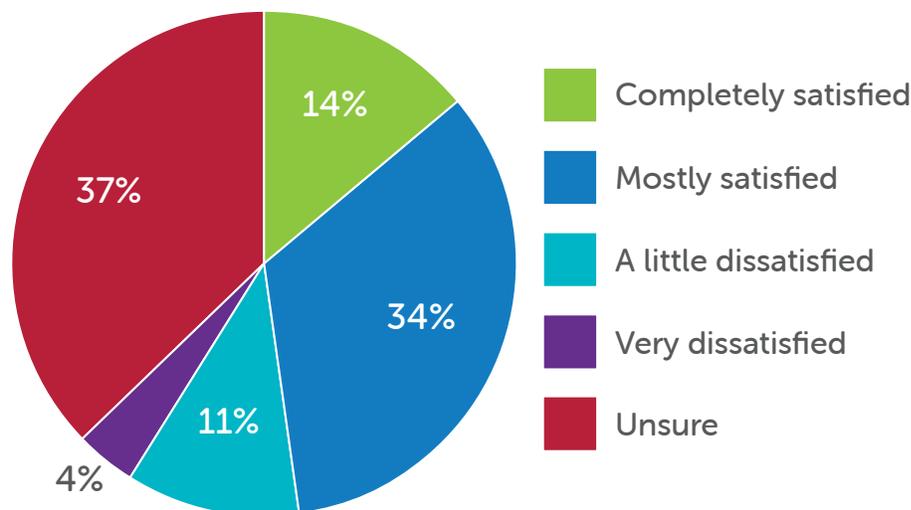


AGENCY UTILIZATION AND SATISFACTION

Overall, how satisfied are you with your marketing agency?

More than half of respondents say they are either a little dissatisfied, very dissatisfied, or unsure about their level of satisfaction with their marketing agency.

- The percentage of drug development services companies (which excludes sponsors) that are completely or mostly satisfied decreased from 65% in 2018 to 47% a year later.
- Survey participants who work for CROs express a lower level of satisfaction than those employed by sponsors or other pharma companies.
- Companies with a marketing spend of 5% or more of revenue have significantly higher levels of satisfaction than do companies that have a proportionally smaller marketing budget.
- More than one-third (37%) of survey participants said they were unsure about how satisfied they were with their marketing agency. This level of ambivalence is surprisingly high.



Level of Satisfaction	CROS	OTHER PHARMA SERVICES	SPONSORS
Completely/mostly satisfied	42%	58%	50%
A little/very dissatisfied	9%	9%	29%
Unsure	47%	33%	21%

Level of Satisfaction	MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
Completely/mostly satisfied	40%	71%
A little/very dissatisfied	8%	10%
Unsure	52%	19%



AGENCY UTILIZATION AND SATISFACTION

On a scale of 1-5 (5 being the most satisfied), what is your perception of your marketing agency's performance for the following?

Respondents expressed the most satisfaction with their marketing agency's timeliness.

- When respondents were asked to evaluate timeliness, about two in five respondents (41%) assigned either a 5 or a 4.
- Survey participants were least satisfied with their marketing agency's client survey work. Fewer than one in six (15%) assigned a 5 or a 4.
- In that none of these average ratings is above 4.00, there is significant room for improvement.

Area*	5	4	3	2	1	AVG. RATING
Timeliness	16%	25%	20%	0%	3%	3.80
Project management	12%	21%	23%	2%	3%	3.59
Marketing plans	9%	16%	17%	7%	0%	3.56
Marketing strategy	13%	16%	15%	9%	3%	3.48
Market research	7%	13%	22%	7%	1%	3.36
Client surveys	8%	7%	20%	3%	4%	3.24

*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."

Area	CROS	OTHER PHARMA SERVICES	SPONSORS
Market research	4.00	3.63	2.81
Client surveys	3.60	3.35	2.75



AGENCY UTILIZATION AND SATISFACTION

On a scale of 1-5 (5 being the most satisfied), what is your perception of the following digitally related aspects of your marketing agency's performance?

Respondents gave their highest rating to their agency's work in digital marketing and website development and their lowest rating to their agency's social media efforts.

- Other pharma services companies (excluding CROs) were the most positive in their evaluations of digital marketing.
- Companies with marketing budgets of 1% or less of revenue are more inclined to favorably view their agency's website development and search engine optimization (SEO) efforts than those companies with proportionally larger marketing budgets.
- The fact that none of these average ratings is above 4.00 indicates rival marketing agencies have opportunities.

Area*	5	4	3	2	1	AVG. RATING
Digital marketing	13%	21%	18%	4%	1%	3.70
Website development	12%	26%	20%	4%	2%	3.64
Search engine optimization (SEO)	13%	15%	25%	4%	2%	3.55
Video/animation development	9%	12%	17%	8%	1%	3.42
Social media	5%	12%	24%	5%	1%	3.32
2019 Overall – Digital						3.53

*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."

Avg. Rating for Digital Marketing		
CROS	OTHER PHARMA SERVICES	SPONSORS
3.42	3.89	3.47

Area	MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
Website development	4.27	3.41
Search engine optimization (SEO)	3.90	3.38



AGENCY UTILIZATION AND SATISFACTION

On a scale of 1-5 (5 being the most satisfied), what is your perception of the following content and creative development aspects of your marketing agency's performance?

The highest ratings were for content development (3.74) and graphic design (3.67).

- The lowest-rated areas were scientific/technical writing (3.09) and press releases (3.11).
- Drug development services companies were disappointed in their agency's trade show planning this year: Average ratings declined from 3.80 in 2018 to 3.13 in 2019.
- Companies with smaller marketing budgets, as a percentage of revenue, assigned a higher average rating for editorial pitching (4.00) than those companies with proportionally larger marketing budgets (3.23).

Area*	5	4	3	2	1	AVG. RATING
Content development	16%	20%	24%	4%	0%	3.74
Graphic design	10%	31%	16%	4%	2%	3.67
Media planning/placement	4%	24%	18%	4%	0%	3.56
Editorial pitching	9%	16%	18%	6%	3%	3.41
Trade show and event planning/execution	3%	16%	12%	6%	4%	3.19
Press releases	3%	17%	18%	11%	3%	3.11
Scientific/technical writing	6%	17%	22%	7%	8%	3.09
2019 Overall – Content/creative						3.40

*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."

Avg. Rating for Editorial Pitching	
MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
4.00	3.23



AGENCY UTILIZATION AND SATISFACTION

How does your marketing provider compare to other agencies in the industry in the following areas?

Survey participants assigned their highest ratings for agency responsiveness.

- Respondents gave the lowest average ratings for market research (3.16).
- DDS companies were disappointed in their agency's project management this year; this was the area with the greatest decline in average ratings.
- Those who work for CROs or sponsors assigned lower average ratings for overall client service, ease of doing business, and creative than did those who work for other pharmaceutical services companies.

Area*	5	4	3	2	1	AVG. RATING
Responsiveness	22%	26%	16%	3%	1%	3.93
Quality	16%	29%	17%	6%	0%	3.81
Flexibility	22%	18%	17%	8%	1%	3.78
Overall client service	16%	25%	16%	9%	1%	3.68
Timeliness	17%	21%	20%	8%	1%	3.67
Marketing expertise	11%	24%	20%	7%	0%	3.65
Ease of doing business	13%	30%	15%	9%	1%	3.64
Communication	14%	20%	26%	5%	1%	3.61
Life sciences expertise	13%	21%	15%	8%	3%	3.52
Creative	9%	22%	28%	7%	0%	3.51
Marketing strategy development/consulting	9%	21%	18%	10%	0%	3.49
Project management	9%	22%	13%	11%	2%	3.42
Pricing/value	11%	20%	21%	11%	3%	3.36
Performance reports demonstrating ROI	9%	11%	18%	13%	1%	3.28
Market research	3%	11%	20%	7%	2%	3.16
2019 Overall – Comparison to Other Agencies						3.57

*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."



AGENCY UTILIZATION AND SATISFACTION

Area	2018 DDS COMPANIES	2019 DDS COMPANIES
Ease of doing business	3.94	3.65
Life sciences expertise	3.64	3.42
Project management	3.79	3.45
Pricing/value	3.71	3.49

Area	MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
Marketing expertise	4.09	3.57
Ease of doing business	4.17	3.56
Life sciences expertise	4.00	3.36

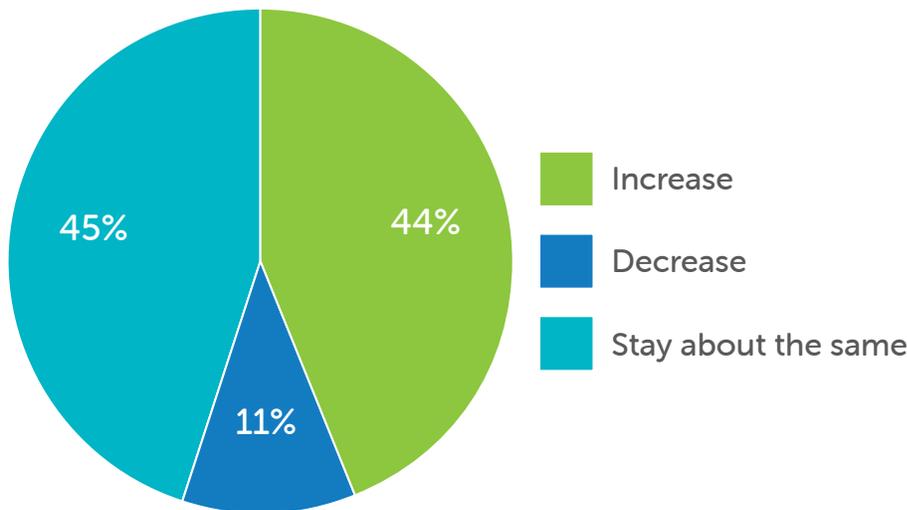


TRADE SHOW TRENDS

Do you expect the number of trade shows and conferences at which you exhibit to increase or decrease in 2020?

Forty-four percent of respondents plan to expand their trade show presence in the upcoming year.

- Survey participants from CROs and sponsors are more likely to increase trade show activity in 2020 than are other pharmaceutical services companies.
- Companies with marketing budgets of 5% or more of revenue are more likely to exhibit at additional trade shows next year than are companies with a proportionally smaller marketing budget.



Percentage Expecting to Exhibit More in 2020		
CROS	OTHER PHARMA SERVICES	SPONSORS
52%	30%	50%

Percentage Expecting to Exhibit More in 2020	
MARKETING BUDGET 1% OR LESS OF REVENUE	MARKETING BUDGET 5% OR MORE OF REVENUE
36%	47%

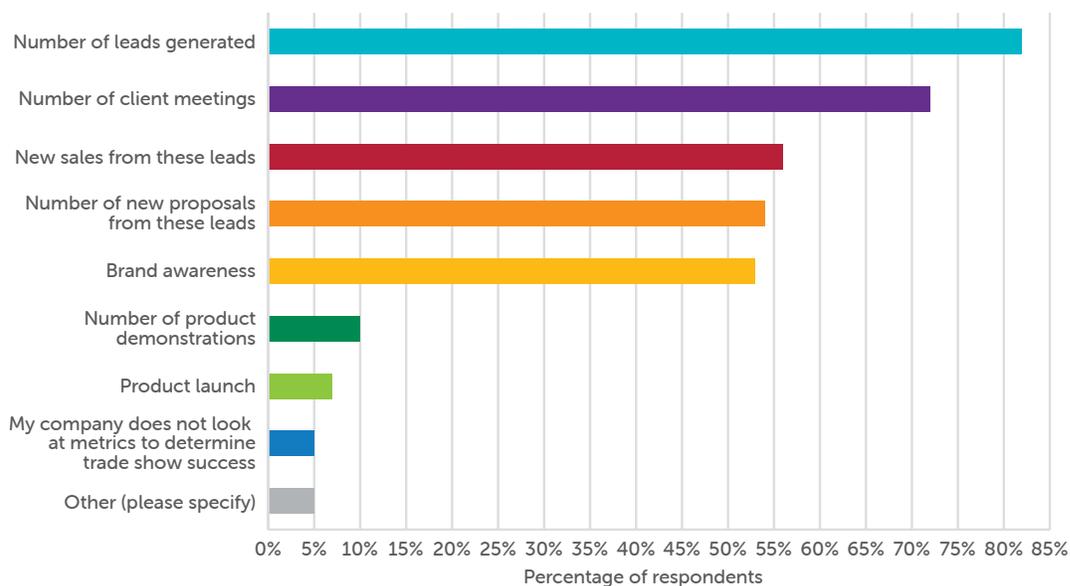


TRADE SHOW TRENDS

Which of the following metrics do you use to determine if attending a trade show was successful? (Select all that apply.)

Activities related to lead and sales generation (leads, meetings, sales from leads and new proposals) are the most prominent metrics used to evaluate success. Additionally, over 50% of respondents noted brand awareness as an important factor.

- CROs and sponsors are more likely than other pharmaceutical services companies to use number of leads generated as a metric when evaluating the success of a trade show.
- Companies with marketing budgets of 1% or less of revenue are much more likely than are companies with proportionally larger marketing budgets to use number of leads generated, number of client meetings, and new sales from these leads as indicators of whether a trade show was successful.
- Five percent of respondents said that their company does not look at any metrics to determine trade show success.

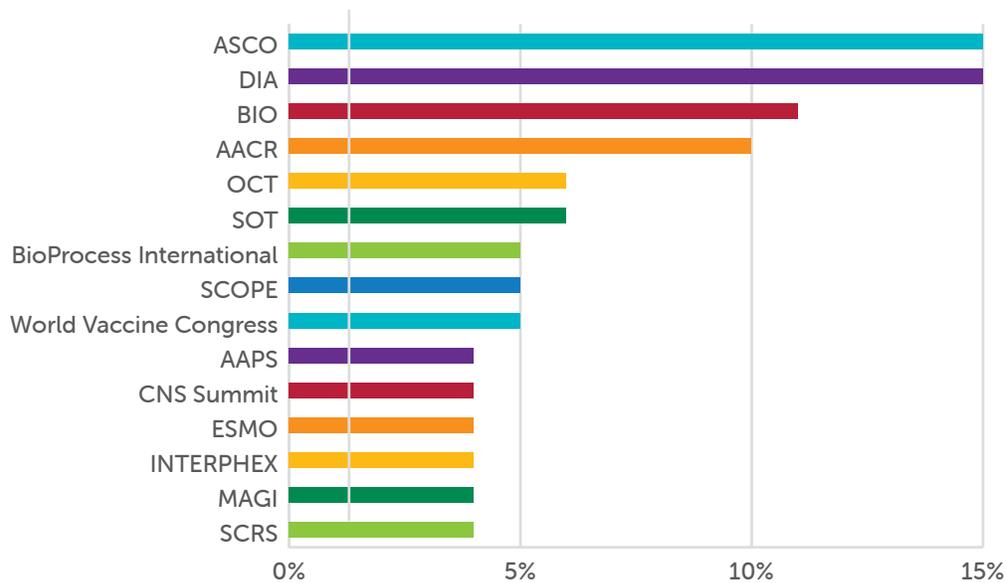


TRADE SHOW TRENDS

What are the top three industry events that are most effective for your company to attend/exhibit at? (Identify up to three events.)

For the fifth year in a row, DIA leads the list, sharing the top position for the first time with ASCO.

- Two shows — CPhI and DCAT — dropped off the top five list in 2019.
- ASCO was named by just 7% of respondents in 2018. This increase is in part attributable to the inclusion of sponsors in the 2019 survey.



Event	CROS	OTHER PHARMA SERVICES	SPONSORS
ASCO	23%	0%	26%
DIA	13%	33%	11%
BIO	10%	17%	16%
AACR	10%	6%	11%
OCT	17%	0%	0%
SOT	17%	0%	0%
BioProcess International	0%	0%	11%



DIGITAL MARKETING TRENDS

On a scale of 1-5 (5 being the most effective), how effective are the digital marketing tactics that your company uses?

Webinars and white papers are considered the most effective.

- Respondents assigned high-end ratings to webinars and white papers at the exact same rate; 17% gave them a 5 and 24% gave them a 4.
- While developing a case study was once considered the most effective digital tactic (in 2015 and 2016), it has now fallen to fourth.
- E-blasts/e-newsletters was the second-highest-rated digital tactic in 2017 before falling to sixth in 2018 and 10th in 2019.
- While CROs find white papers to be their most effective tactic, sponsors and other pharma services companies name webinars.
- Podcasts was the lowest-rated tactic in each of the last three years.

Tactic*	5	4	3	2	1	AVG. RATING
Webinars	17%	24%	17%	6%	2%	3.72
White papers	17%	24%	20%	3%	7%	3.58
Social media	13%	26%	31%	7%	7%	3.37
Case studies	7%	23%	24%	7%	3%	3.36
Pay-per-click (e.g., Google Ads, retargeting, geo-targeting)	14%	21%	22%	7%	9%	3.32
Video	9%	18%	23%	7%	6%	3.29
Infographics	8%	11%	25%	6%	3%	3.28
Digital advertising	9%	18%	31%	13%	3%	3.23
Online presentations	6%	17%	23%	5%	6%	3.22
E-blasts/e-newsletters	11%	21%	26%	16%	6%	3.20
Blogs	2%	20%	23%	10%	6%	3.04
E-books	5%	9%	18%	6%	6%	3.03
Podcasts	3%	3%	14%	7%	6%	2.76
2019 Overall – Digital Marketing Tactics						3.26

*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."



DIGITAL MARKETING TRENDS

Tactic	2018 DDS COMPANIES	2019 DDS COMPANIES
Social media	3.32	3.51
Case studies	3.88	3.39
Infographics	3.21	3.38
Online presentations	3.83	3.14

Tactic	CROS	OTHER PHARMA SERVICES	SPONSORS
Webinars	3.53	3.70	4.00
White papers	3.79	3.39	3.33
Pay-per-click (e.g., Google Ads)	3.33	3.58	2.85
Video	2.77	3.32	3.50

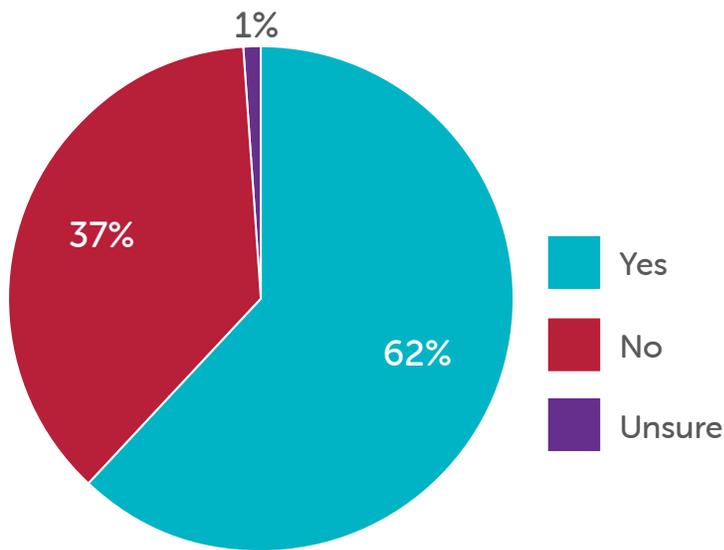


DIGITAL MARKETING TRENDS

Do you use social media advertising for your business (e.g., Sponsored Updates on LinkedIn)?

Three-fifths (62%) of those who participated in the survey said their companies use social media advertising for their business.

- Utilization of social media advertising continues to grow. In 2016, 35% of respondents indicated they used social media advertising for their business. By 2019, this percentage has almost doubled (66%).



Percentage Using Social Media Advertising	
2018 DDS COMPANIES	2019 DDS COMPANIES
61%	66%

Percentage Using Social Media Advertising		
CROS	OTHER PHARMA SERVICES	SPONSORS
68%	59%	48%



DIGITAL MARKETING TRENDS

How often do you post/promote your company via the following platforms?

Most companies (92%) post or promote themselves most frequently on LinkedIn. Only one-third (33%) use Instagram.

- An increasing number of DDS companies are posting daily on LinkedIn, from 25% in 2018 to 34% in 2019.
- About one-third of CROs (29%) and other pharmaceutical services companies (33%) use LinkedIn every day. Sponsors rarely post daily.

Platform	DAILY	WEEKLY	MONTHLY	A FEW TIMES A YEAR	NEVER
LinkedIn	27%	31%	19%	15%	8%
Twitter	20%	28%	8%	8%	36%
Facebook	12%	26%	5%	15%	43%
Instagram	9%	10%	7%	6%	67%

Platform	PERCENTAGE OF DDS COMPANIES POSTING DAILY (2018)	PERCENTAGE OF DDS COMPANIES POSTING DAILY (2019)
LinkedIn	25%	34%
Twitter	25%	26%
Facebook	11%	15%

Platform	PERCENTAGE OF CROS POSTING DAILY	PERCENTAGE OF OTHER PHARMA SERVICES POSTING DAILY	PERCENTAGE OF SPONSORS POSTING DAILY
LinkedIn	29%	33%	5%
Twitter	19%	30%	0%
Facebook	6%	19%	0%



DIGITAL MARKETING TRENDS

On a scale of 1-5 (5 being the most effective), how effective are these social media platforms that your company uses to get your messaging to your target audience?

LinkedIn is the clear leader. Among DDS companies, ratings for the Twitter and YouTube platforms increased this year.

Platform*	5	4	3	2	1	AVG. RATING
LinkedIn	42%	20%	22%	8%	3%	3.93
Twitter	9%	14%	27%	10%	12%	2.98
YouTube	7%	8%	12%	9%	10%	2.83
Facebook	7%	16%	14%	9%	19%	2.75
Instagram	6%	7%	8%	5%	15%	2.60
Vimeo	0%	0%	5%	5%	10%	1.71
Snapchat	0%	0%	6%	3%	17%	1.57

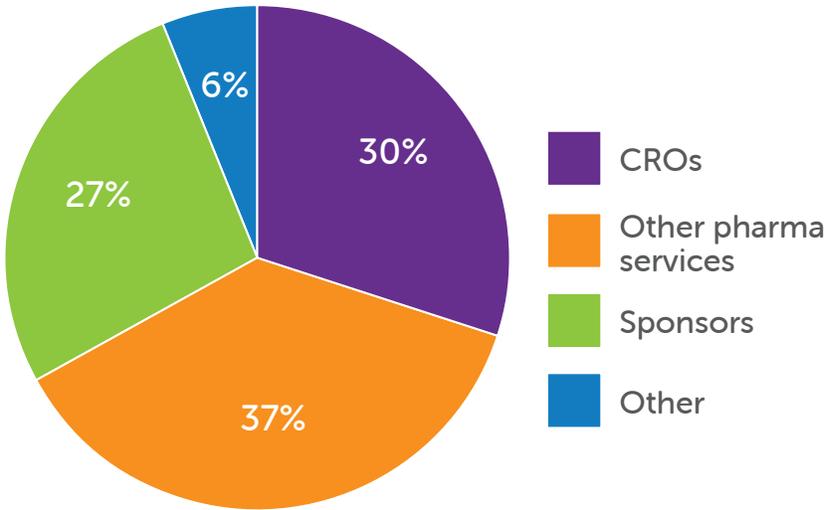
*The sum of the percentages might not equal 100% because we do not report responses such as "n/a" or "unsure."

Platform	2018 DDS COMPANIES	2019 DDS COMPANIES
LinkedIn	4.26	4.06
Twitter	2.98	3.08
YouTube	2.65	2.91

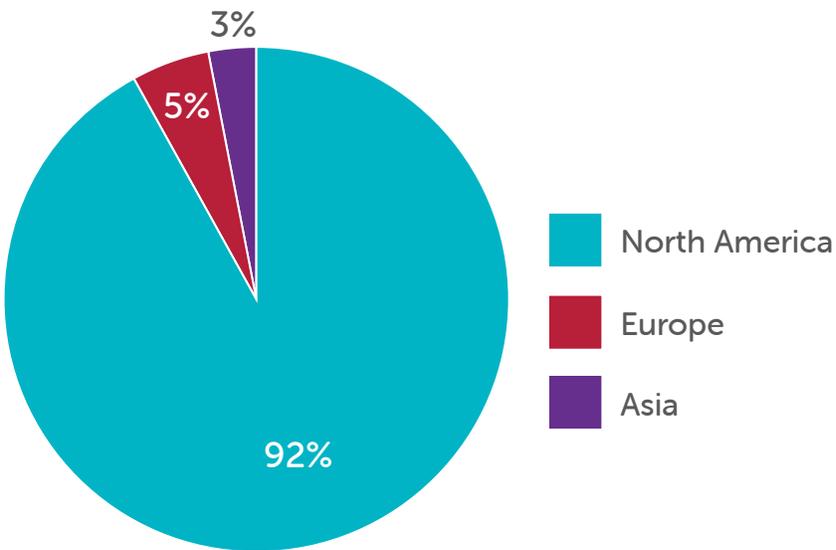
Platform	CROS	OTHER PHARMA SERVICES	SPONSORS
LinkedIn	4.00	4.11	3.50
Twitter	2.90	3.23	2.64
YouTube	2.43	2.79	2.33

RESPONDENT DEMOGRAPHICS

Company Type

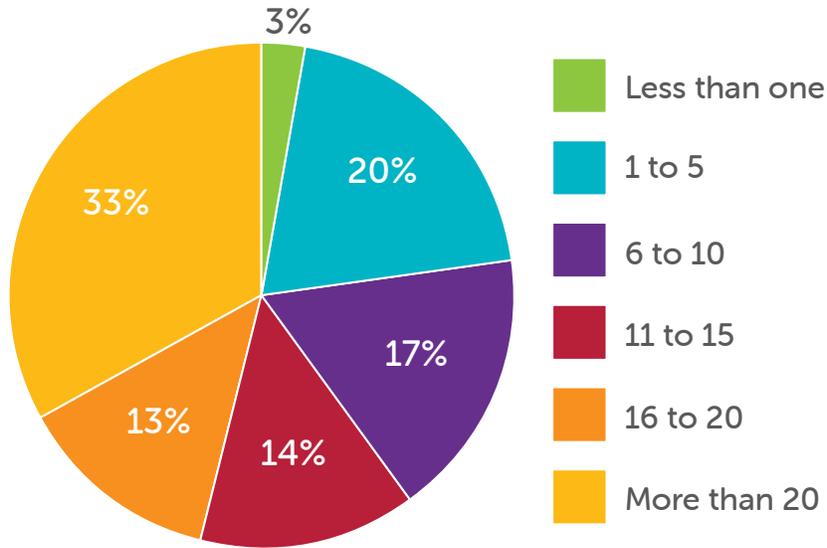


Office Location

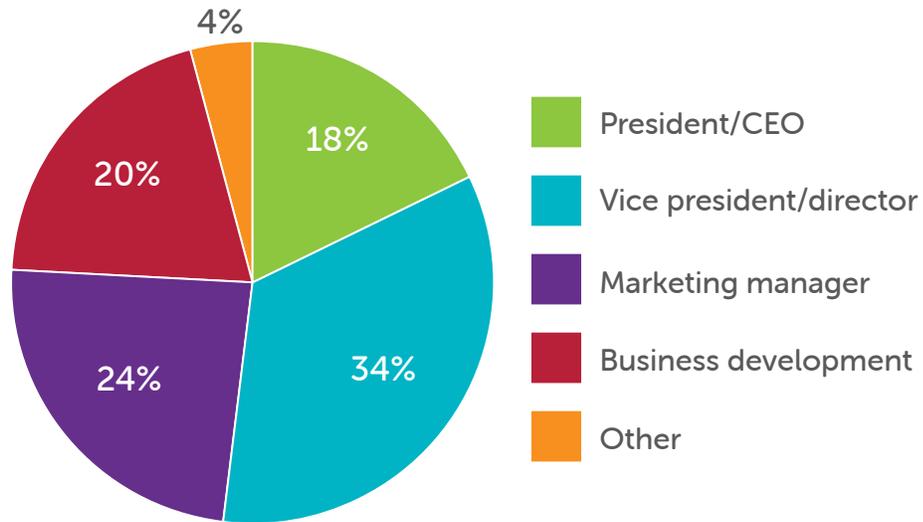


RESPONDENT DEMOGRAPHICS

Years Worked in the Life Sciences Industry



Job Function



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