



VIEWS FROM THE TOP

A SNAPSHOT OF INDUSTRY-LEADING OPINIONS

*Is our industry facing a widening gap
between aspiration and capability?*

A stragmar report
Spring 2025

CONTENTS

This report contains a summary overview.
A fuller and more detailed report is available on request. A presentation of these findings specifically tailored to your organisation is also available.

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Introduction

4

The consumerisation gap

5

The resources gap

8

The omnichannel gap

10

The technology gap

13

The marketing agility gap

15

Perspectives for the future

17

*The page numbers, and where
'CONTENT' appears at the top of
a page, are clickable*

*A massive 'thank you' to everyone who contributed.
We can't name all of you here, but your insights and
honest responses have been invaluable.*

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Is our industry **KEEPING AHEAD** or barely keeping up?



Baba Awopetu, CEO, Stragmar

Is there a widening gap between where marketing needs to be, and where it actually is?

The world is changing rapidly. Within marketing for example, we are impacted by geopolitical, environmental, cultural and technological changes. Their impacts are accelerating and compounding, both positively and negatively.

How well we recognise the changes, adapt to them, and potentially take advantage of them, is what dictates our future successes or failures. Prediction is difficult, but if you take too long responding to change it may be too late.

Technology in particular changes so rapidly that the only way to take advantage of it is to **predict and adopt, not wait and adapt.**

For marketers across Europe in the health and medical tech sector, the consequences of not evolving may be to lose out to competitors who more competently adapt and embrace change.

Of course, no organisation is actually sitting still. None are resisting change, and all are 'embracing' the opportunities presented. The issue, potentially, is that the changes organisations are making **can mask the changes they need to adopt.** Internal change is always tricky, and as the pace of external change outstrips the pace of internal change, so organisations slip behind.

Furthermore, because there is a tendency towards siloed operations, the cumulative effect of functions, services or skills falling behind may go unnoticed. Unless the various departments within an organisation become more joined up, the urgency or imperative for rapid change may well be missed.

Our top-down view, garnered from top-level respondents within the industry, our survey has spotted steadily widening gaps between current status, and what's necessary from the marketing/business perspective.

Within any company such gaps are a worry - but when you see the trends across the industry, it should be sounding alarm bells.

It's not all gloom, though. Healthcare and health tech marketing is not so overwhelmingly adrift that the cause is lost. When you look at the responses, by and large the challenges and opportunities are understood. However, there is a gap between recognising the challenges, and responding to them. When you aggregate the views of the top tier marketers who contributed their thoughts to Views from The Top 2024, three observations are clear:

- (1) there is a gap between where our marketing capabilities currently are, and where they should be
- (2) this gap is widening
- (3) when you view all the widening gaps together, the urgent need to remedy this becomes apparent

However, there's actually even more to consider. Implementing change in large organisations is slow and cumbersome. **In order to stay on top of the changing environment you in fact have to be adapting to change ahead of time.**

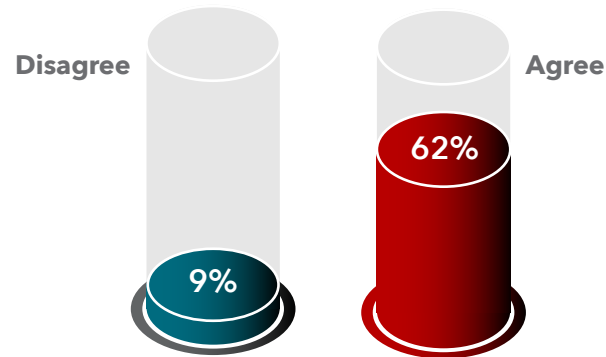
Or put another way, you have to keep ahead just to keep up.

The CONSUMERISATION gap

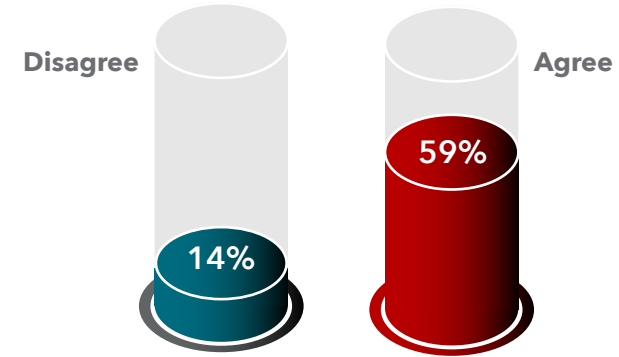
Is there a widening gap between marketing organisations' recognition of the importance of customers/consumers in future marketing success, and the actual level of customer/consumer insight?

Our top tier contributors recognise that the customer/consumer is gaining importance as a decision-maker within the healthcare arena. They also agree that direct-to-consumer channels will play key roles in future successes. Consumerisation and personalisation **are the biggest perceived trends.**

There will be a shift in power and decision-making in healthcare towards consumers/patients



Direct-to-consumer channels and approaches will be key to successes in the future



"Consumers are demanding more control over their health. Med tech companies that can develop products and services that empower patients will be successful." Susan Tousi, CEO of Medtronic

The industry understands its products, but has less understanding of its customers



What emerging trends do you see shaping the pharma/med tech marketing landscape over the next few years?



FMCG brands excel at directly reaching consumers and educating them about their products. Med tech and pharma companies need to explore similar strategies to empower patients and drive product adoption.

Our respondents observe that trends such as consumerisation of audience, the accelerating role of AI, personalisation in healthcare provision, increased digitalisation in the whole chain, etc. are gathering pace.

But is the industry embracing it? Is it ready for it, acting on it and delivering it?

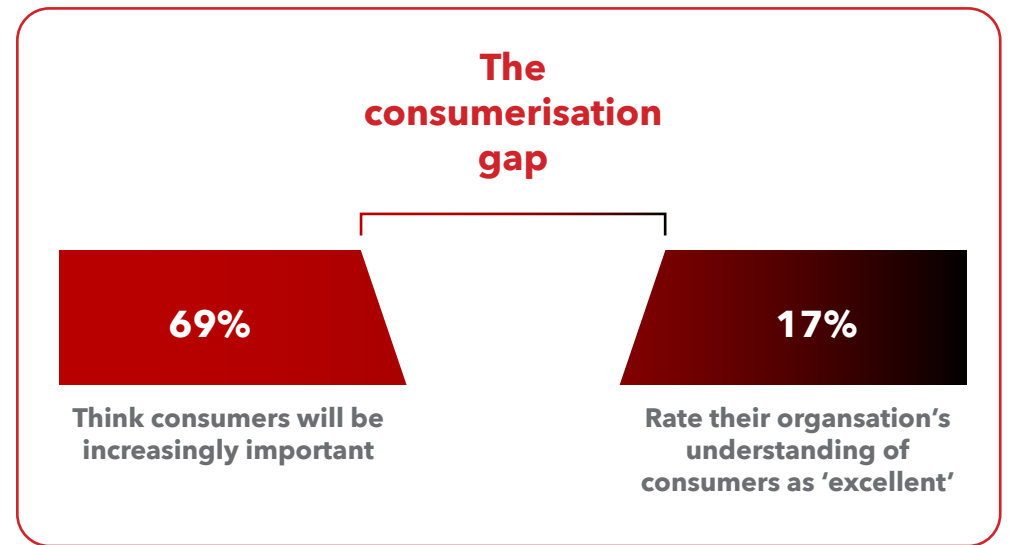
Generally the shift towards consumer empowerment is evident everywhere. Whilst there is some degree of uncertainty amongst our respondents, with a minority of respondents being unsure, only 9% disagreed. Additionally, only 14% rejected the notion that direct-to-consumer channels will be increasingly important. So, it seems, our respondents either agreed that increasingly the consumer needs to be taken into consideration, or at the very least were of a 'wait and see' mindset.

But what of the actual capabilities and behaviours within the healthcare and med tech industries? Only 17% of our respondents rated the industry as being 'excellent' in its understanding of customers. Delving deeper, med tech fared best, and pharma worst. It's unclear from the data whether the different sectors set themselves different benchmarks, in other words whether pharma judged itself more harshly, but whichever way you cut the data the figures are very low.

By contrast, the industry sectors saw themselves as generally having an excellent understanding of the product. So, let's put this into context. The health and med tech industries recognise, at least to a large extent, the growing importance of the consumer within its marketing efforts, yet only 17% see their understanding of these consumers as excellent.

Understanding of product looks better with an average 73% rating their organisations as excellent. But there's still room for improvement - surely the 27% who don't rate their organisations as having an excellent understanding of their own products might want to re-examine their training.

So, when you look at the responses to a number of different key questions about the consumer, a shortfall emerges. This is the consumerisation gap - the shortfall between the recognised importance of the consumer, and the level of insight and connectedness about the consumer that the organisation currently practices.



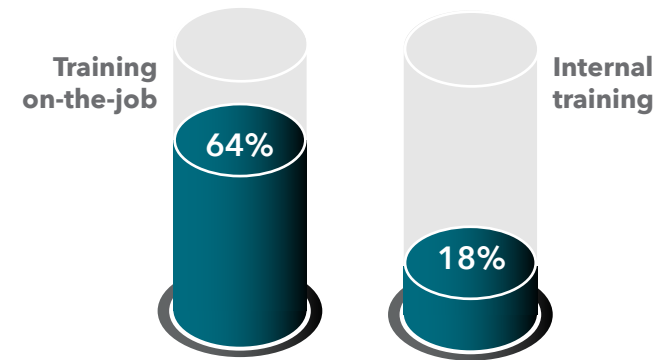
The RESOURCES gap

Are marketing organisations increasingly falling short of their training and development needs? Are they failing to optimise them for future success? And in turn is this leaving personnel increasingly ill-equipped to satisfy their aspirations for market leadership?

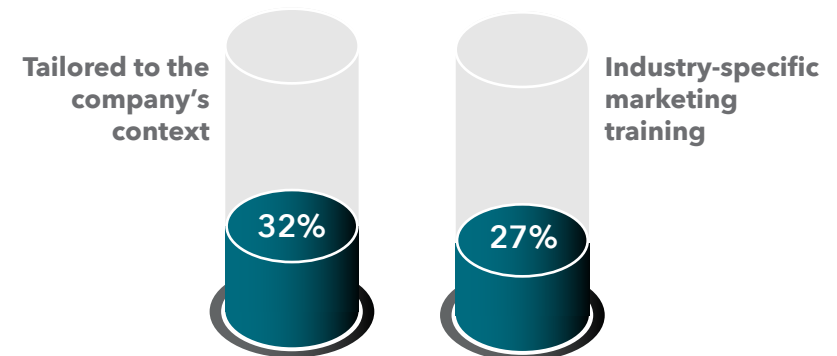
Our respondents recognised that in the main, their organisations were committed to training, but that it was 'traditional'. The types of training and development tended to be 'on-the-job' (we might call this unstructured) or via internal delivery. Thus it is based on what has gone before, what is 'always done' and what is expected.

The issue, we see, is that these approaches are backward facing, not forward facing. Furthermore, internal training tends to be delivered by colleagues, not dedicated trainers, and frequently perpetuates old habits, approaches and processes. Experiences, approaches and innovations from leading organisations, and in particular from successful organisations within other sectors, is not a feature. The net effect is a risk that organisations competing for leadership do 'more of the same', rather than innovate their activities to claim the higher ground.

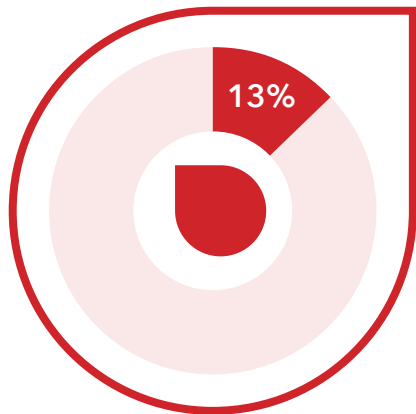
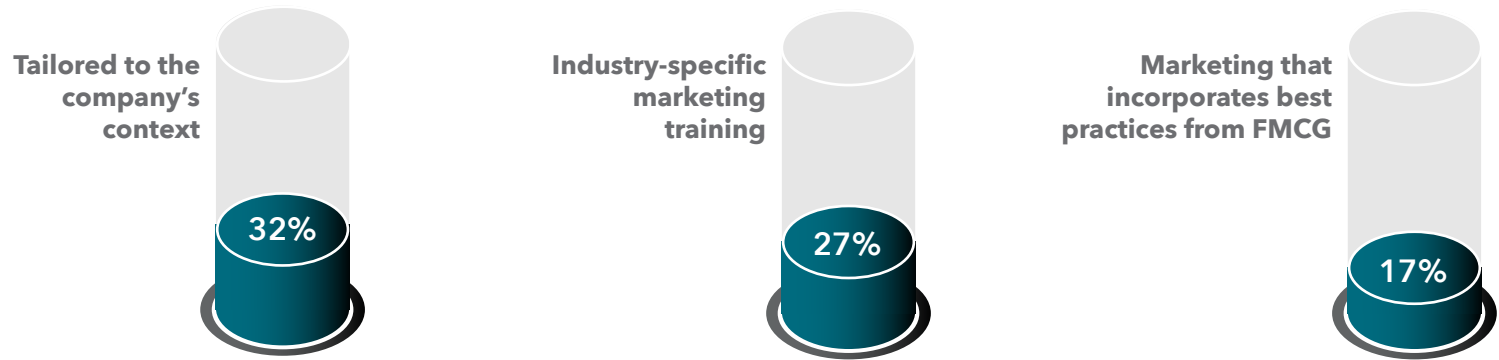
How are marketing teams trained and developed?



Which approach to marketing training would be most effective?



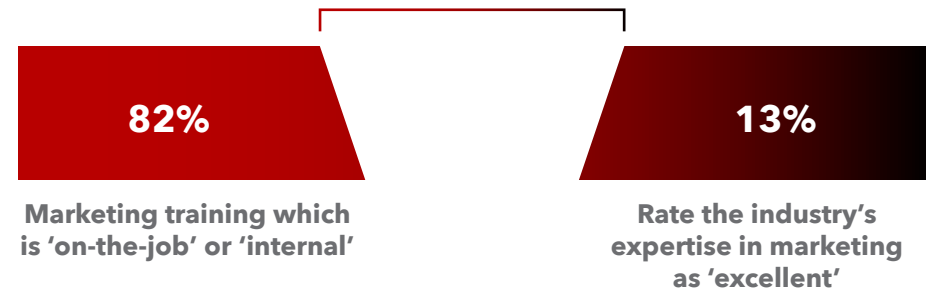
Which approach to marketing training would be most effective?



Percentage of respondents rating the industry's expertise in marketing as 'excellent'

Only 13% of our respondents rated the industry as 'excellent' with regard to expertise in marketing. However, over 80% of the training was reported as being 'on-the-job' or 'internal'.

The resources/training gap



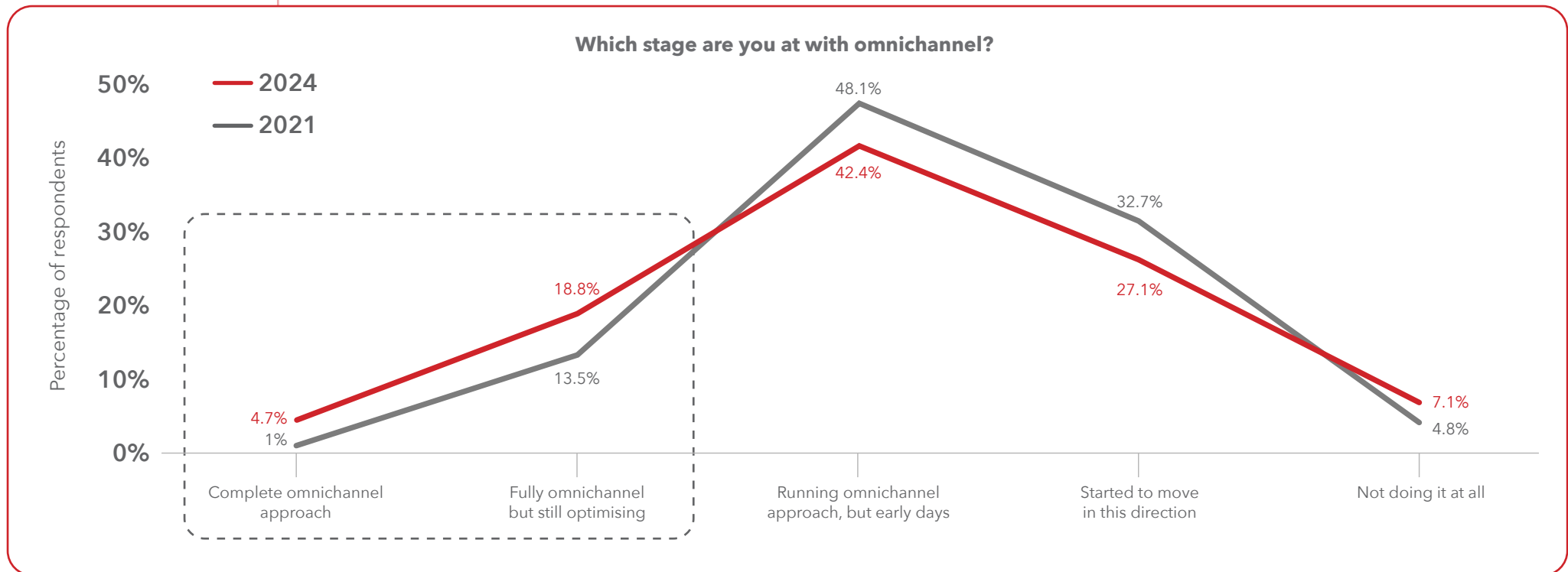
Clearly there is a training and resources gap: that gap is the difference between how expertise is being developed, and the result.

The OMNICHANNEL gap

The industry is fairly clear - omnichannel strategies are essential.

Adoption to some extent is widespread. It is, however, far from fully implemented.

The observation is that little has changed since 2023. A shift from 1% (2021) to 4.7% (2024) of organisations having a fully omnichannel approach is definitely a move in the right direction, but far too low.



Around 19% of respondents said their organisation was 'fully omnichannel but still optimising'. Which is good news, although the shift from 13.5% in 2021 suggests the 'optimising' is slow and steady.

Worryingly, the percentage 'running omnichannel, but early days' has barely improved since 2021. Indicative, perhaps, of the industry's cautious movements in technology adoption and skillset. Still, this is in accord with the 37% of organisations 'not doing it at all' or 'starting to move in this direction'. A figure that's hardly changed since 2021.

Reasons for the small shift may vary. For some, it's the silo-like structures of the organisation. For others, it may be the low levels of technology competency, or just a shortage of the human resources that are necessary to implement sophisticated messaging.

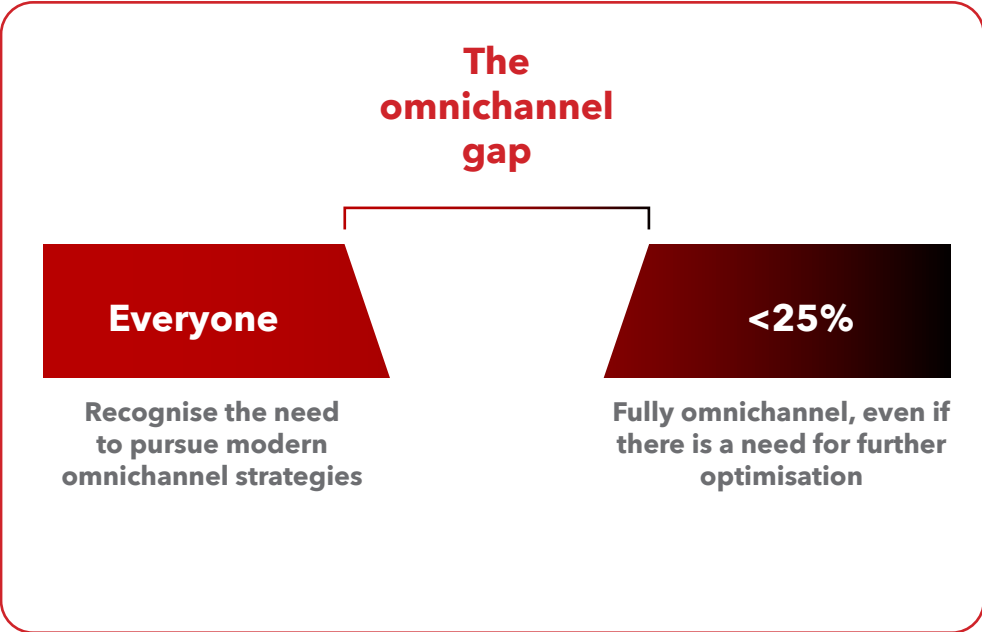
Global core campaigns are also a potential source of friction. As materials emerge from head office for localisation, it is often the case that this localisation may be limited to broad cultural sensibilities, translation and legislation adherence. Many organisations find themselves limited in the scope of the materials available for implementation, or for effective message sequencing. What they may need, but seldom have, is a suite of creative elements which can be readily (and cost effectively) evolved and implemented. With such a framework, the marketing effort would gain greater flexibility, sequencing possibilities and adaptability for the various dimensions of the omnichannel strategy being pursued.

The future of omnichannel in healthcare will be characterised by advanced data analytics, AI and machine learning. [But] using software and systems will only get you so far, especially if everyone is using them. You still need to do brilliant marketing by consistently delivering your brand message, meeting HCPs' and patients' needs, and ensuring every interaction across all channels reinforces trust and provides value.

Tom Vaughton, CEO, Varn Media & Varn Health

Omnichannel in healthcare means creating a seamless and integrated experience for your customer across all touchpoints, from digital platforms to in-person interactions, [ensuring a] consistent and personalised communication, regardless of the channel used.

Tom Vaughton, CEO, Varn Media & Varn Health



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The TECHNOLOGY gap

AI is going to replace us all. Discuss.

*“AI will handle 95% of marketing work [within the decade].”
Sam Altman, CEO, Open AI*

Sam Altman, CEO of Open AI, expects that AI will “handle 95% of marketing work.”

Healthcare and med tech marketers are not alone in being aware of, sceptical of, concerned about and interested in, AI. But the expectations are mixed, based on experience of AI to date, hype, and an innate concern for one’s future employment. A generalised view is that it can’t replace the ‘human touch’. Additionally, it is expected that marketers who leverage AI will gain deeper insight, understanding and strategic depth.

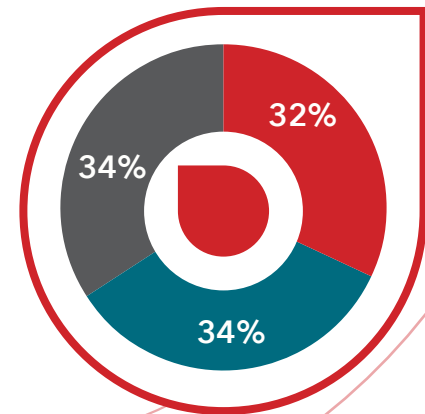
A large proportion of healthcare and med tech marketers are not subscribing to Sam Altman’s view, and do not see AI replacing them. Responding to the notion that AI will replace most marketers over the next decade, around 56% disagreed, either somewhat or strongly. Only around 12% somewhat or strongly agreed.

And yet, when it comes to whether we are underestimating the threat of AI, approximately one third weren’t sure, one third agreed and one third disagreed. No real consensus, then.

A look at where our responders see a role for AI perhaps offers some insight into their estimation of the opportunities. The top three ‘jobs’ for AI are thought to be Predictive Analytics, Content Creation and Personalisation. It would appear, then, that if AI isn’t taking jobs, our industry had better rapidly rise to the challenge of integrating it fully.

AI poses a significant threat to traditional roles and processes in the healthcare market

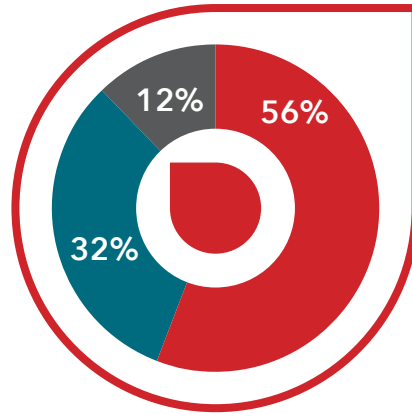
- Disagree
- Unsure
- Agree



*“AI...won’t replace the human touch. Our creativity, strategic thinking and ability to understand human emotions will continue to be irreplaceable.”
Scott Brinker, Marketing Technology Expert*

AI will replace most marketers over the next decade

- Disagree
- Unsure
- Agree



“AI won’t replace marketers; it will make them more strategic and productive.”
Paul Chadha, CEO, Marketing Automation Institute

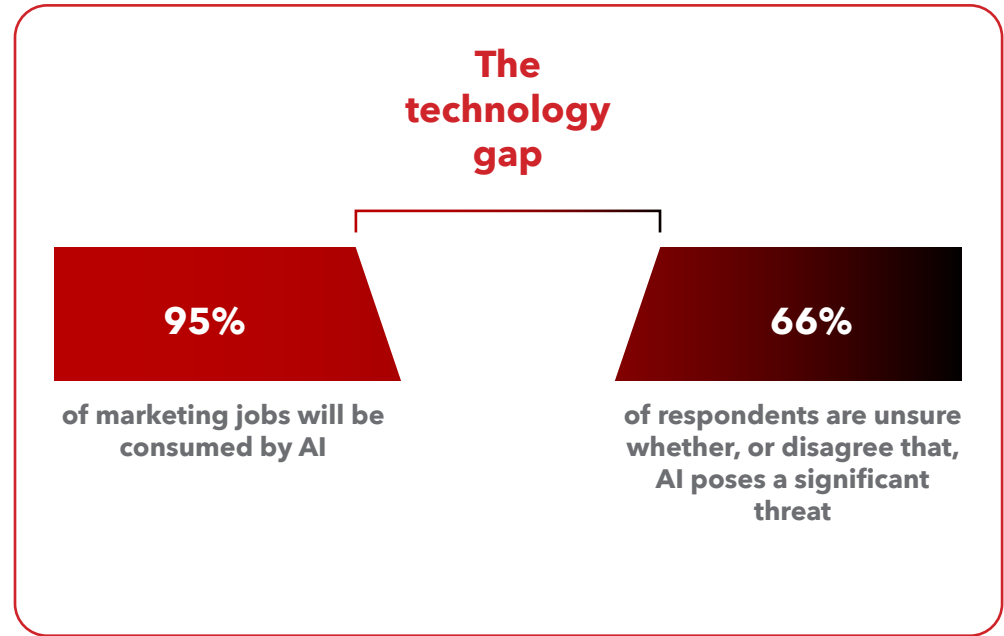
Overall, our industry’s somewhat mixed view of AI’s pros and cons, especially with regard to whether these marketers will be replaced, reflects the fact that we are going into the unknown, and that the tech develops so fast.

But there is a technology gap, nonetheless. It is the potential shortfall between what the very latest digital and AI technologies can do for us, and how swiftly (or otherwise) we’re taking advantage of them.

If we’re too slow to take advantage of these technologies, by the time we’ve begun applying them within our marketing efforts in order to gain advantage, both the tech, and more importantly the customers will have moved on.

Waiting for AI to make an impact? Too late. The issue our respondents are presenting is whether we have the courage, vision and skills to adopt and adapt.

The answer, they fear, is no.



The MARKETING AGILITY gap

In 2021 we identified an area of concern. The CEOs and other C-Suite respondents recognised that the comfort zone area of competence amongst organisations in the pharma and med tech industries was product knowledge, not marketing skill. As we would imagine, they rated their competence in product understanding as excellent. Well, in 2024 there has been little change.

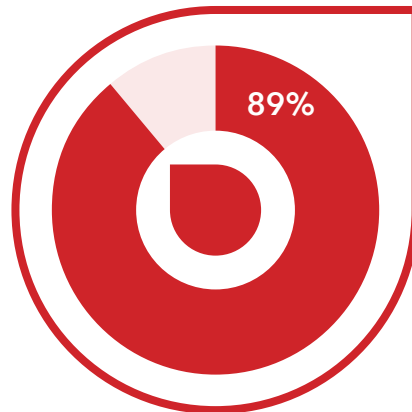
Despite this reliance on product knowledge, we noted that our respondents almost universally (89%) saw marketing as very important to their success in this industry.

But only 12% rated the industry as being 'excellent' at marketing. This has barely improved since 2021.

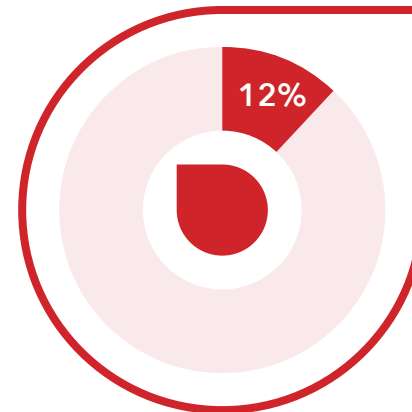
So let's consider this in plain language: our industry sees itself as having low levels of excellence in understanding marketing; yet this same industry believes marketing is, and will be, very important.

The gulf between the recognised importance of marketing, and ability in marketing, is the marketing agility gap. Average marketing skill isn't an option, so elevating marketing excellence must be a priority.

Percentage who see marketing as very important for the industry over the next 5 years



Percentage who believe the industry is 'excellent' at marketing



*In the past, innovation was enough to drive success in pharma.
In the future, it's innovation coupled with effective marketing that will win.*

Percentage of healthcare marketing leaders rating product or marketing understanding as 'excellent'



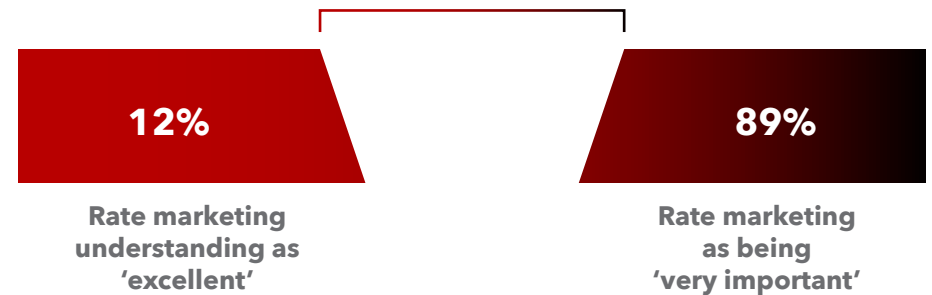
The industry has barely shifted from product focus, despite the recognition that marketing will be important. It's possible that this stems from some historical inertia: if innovation is historically product-led, customer benefit will tend to be perceived internally as product-oriented.

Further, some of this may be due to employees entering marketing from field, sales or technical departments. And we also know that in healthcare, customers say (despite evidence to the contrary) that they need to focus on features and data. Change is needed. But we can also see that the route to change, ie. training, is not currently optimised to create that change.

Raising skill levels, shifting expectations, and closing the marketing agility gap must be a priority.

"[In our industry,] marketing is often too product-centric and doesn't focus enough on the patient journey and their specific needs." Doctor and healthcare innovation blogger

The marketing agility gap



"On-the-job training can perpetuate bad habits and outdated practices if experienced employees are not aware of their own inefficiencies." Dr Brenda Baldwin, L&D specialist

Our VIEWS FROM THE TOP perspectives for the future

We are in the middle of the most dynamic period in healthcare marketing. In fact, healthcare provision, from the companies that develop new therapeutic approaches, through to the way people access healthcare support, is in immense flux. Biotech is surging, thanks to advances in computing. But big pharma is viewed with scepticism. Prices of drugs are high, pipelines are dry, trust is low.

Since we first surveyed the industry in 2021, the market has changed a lot more than the people and organisations. Product knowledge is excellent, but customer knowledge (patients, healthcare systems, doctors etc.) remains low. In a world where our personal data is monitored by supercomputers to facilitate a targeted, tailored experience everytime we access any digital platform, it seems that in our healthcare space, customer-centric excellence should be substantially more effective than it is.

Training of marketers has been largely done on-the-job. It still is. So, despite an environment where we are trying to transform rapidly, there remains a gap between the corporate aspiration for better marketing, and the rate of skill adoption and adaptation.

The gap between the creation of 'health improvement' (be it medication, education, devices such as hips and knees, stents, preventative guidance etc.), and the actual provision/receipt of such improvements by patients, is unfortunately widening.

But it isn't an inevitability. It has arisen due to many factors, such as the growing involvement of tech companies in healthcare and the shift away from the old face-to-face selling model to one where information and promotional flow is sophisticated, multi-faceted, patient-centric and intelligently sequential. In other words, omnichannel.

The survey shows that omnichannel adoption and competence has barely changed in the last three years.

Marketing is predicted to be increasingly important for competitive edge. Yet the new skills needed to outperform the competition are still developing. The industry still finds its comfort blanket in product knowledge, and hasn't really added deep customer insight yet. A more customer-centric approach will be increasingly essential.

Innovation coupled with courage may well hold the key to future growth. The customer, whether patient or healthcare professional, demands it.



Baba Awopetu

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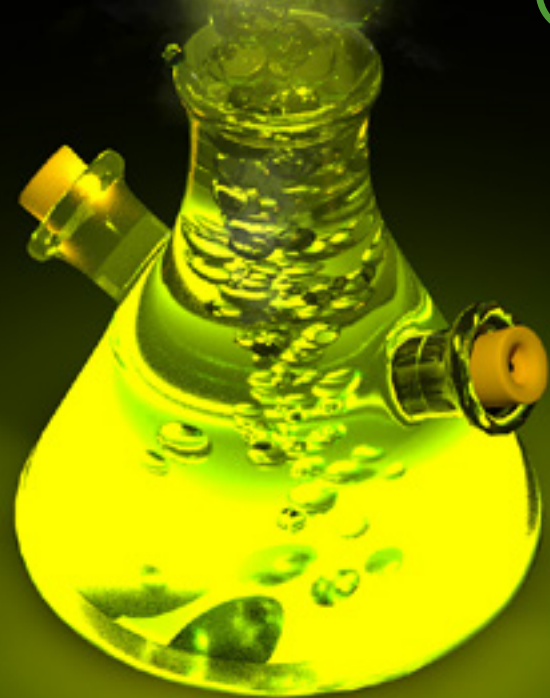
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