

A Note to Our Readers

At the time of this report's publication, consumer sentiment, market demand and overall economic conditions had become volatile due to the COVID-19 pandemic. This report assesses the digital performance of brands in 2019 and early 2020 and hence the data does not capture the impact of the unfolding COVID-19 situation. These insights and takeaways are related to best practices for cost-efficiencies, content strategy and marketing channel optimization.

Please visit [Gartner's COVID-19 resource center](#) to review our resources on how to protect your people, maintain operations and sustain your organization during the pandemic. We will continue to share more resources and updates over the coming days and weeks.

Our priority is the safety and well-being of our clients, employees and the communities we live in, and our thoughts are with those experiencing difficulty at this time.

The Full Report is Available to Gartner Clients Only.

Key Findings

- Brands have invested more in search across the board year over year, with 70% showing increased visibility in both organic and paid keywords. The metabolic and oncology therapeutic areas led the pack.
- Brands in the pharma sector are reluctant to ease up on branded paid search spending, even when branded organic visibility is high and growing, with brands achieving an average of 8.7% higher paid visibility than last year.
- Although conquesting (or competitive bidding) is an inefficient strategy across many sectors, 61% of pharma brands continue to engage in this tactic, finding value from both a cost and conversion perspective.

What Brands Should Be Thinking About

- Digital marketing leaders should focus on expanding the “disease state” content on their websites, and aligning copy to the lexicon patients and HCPs use to search, to help increase organic search visibility.
- Marketing leaders should determine if budgets may be better spent on higher volume upper funnel terms, to raise brand awareness and educate patients and HCPs (healthcare professionals) earlier in their research process.
- Conquesting efforts should be dynamic and fluctuate based on where the brand is in its lifecycle and changes in market share or competitive advantages/disadvantages of the other brands.

Chris Beland | VP, Advisory

Elina Knott | Sr. Principal, Advisory

Camille Tagami | Designer

Gartner research is based on data-driven analysis. Our findings, rankings and recommendations are objective, unbiased and independent of membership.

August 2020

Introduction

Rising levels of competition in the pharma sector are forcing digital marketing leaders to reassess their marketing investments to ensure their brands maintain sufficient share of voice. One of the most widely used promotional channels by pharma brands is search, which is not surprising given that 7% of all Google searches daily are health-related.¹ Despite its higher cost-per-click (CPC), digital marketing leaders are increasingly recognizing the importance of intercepting patients and HCPs (healthcare professionals) earlier in their respective journeys by targeting upper funnel keywords (e.g. “symptoms of MS”), from both a paid and organic perspective. By focusing more efforts on unbranded keywords, marketing leaders can capture users’ attention with disease education, and capitalize on search volumes that are 2.5x higher than branded terms.

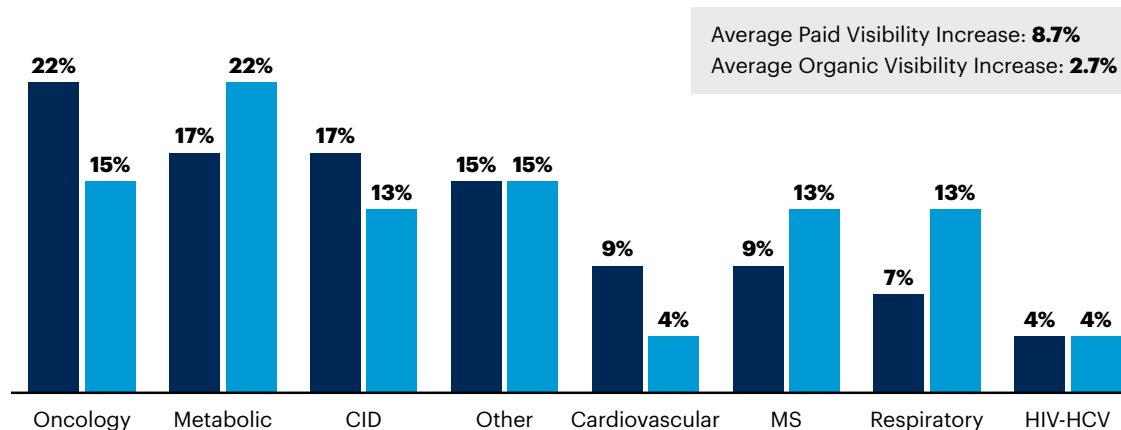
Since last year, 70% of Index brands (that were included in both year’s studies) made improvements that resulted in higher organic visibility, with an average increase of 2.7% per brand (See Figure 1). Marketing leaders are investing in SEO improvements, as well as creating new website content, with the hopes of surfacing higher on more category terms to better compete with the WebMD’s of the world. Similar numbers of brands made investments on the paid side of search, with 70% of brands included in both years’ studies showing increased visibility, with an average increase of 8.7%.

Figure 1.

Proportion of Brands Showing Increased Unbranded Paid/Organic Search Visibility Across Therapeutic Categories

December 2019-February 2020

■ Paid Unbranded Visibility ■ Organic Unbranded Visibility



n = 66 index brands (in both 2019 and 2020 DIQ studies)

Source: Gartner Digital IQ Index: Pharma Rx US 2020

Citations

1. "Dr. Google Will See You Now: Search Giant Wants to Cash in On Your Medical Queries", The Telegraph.

About Gartner for Marketers

Gartner for Marketers provides the objective, expert advice and proven tools you need to seize the right opportunities with clarity and confidence and stay ahead of the trends that matter. Benchmark your performance with data-driven insights. Prioritize investments and areas of improvement. Execute your mission-critical priorities with speed and confidence.

Gartner, Inc. (NYSE: IT) is the world's leading research and advisory company and a member of the S&P 500. We equip business leaders with indispensable insights, advice and tools to achieve their mission-critical priorities today and build the successful organizations of tomorrow.

Our unmatched combination of expert-led, practitioner-sourced and data-driven research steers clients toward the right decisions on the issues that matter most. We are a trusted advisor and an objective resource for more than 15,600 organizations in more than 100 countries — across all major functions, in every industry and enterprise size.

To learn more, visit gartner.com/marketing