



COLLECTIVE PERSPECTIVES 2023

The changing attitudes and challenges
facing communications teams in the
pharmaceutical industry

A September 2023 report from [The Difference Collective](#)
(All our views are our own)

FOREWORD



In all my years working in healthcare communications, I have never seen the pace of change the pharmaceutical sector is experiencing.

Until now, pharma has been relatively recession-proof. Yet the combination of poor economies, Brexit, production costs, challenging pipelines and the voluntary scheme for branded medicines pricing and access (VPAS) capping seems to have mixed a cocktail of conspiring factors that is creating headaches in the form of pharmaceutical challenges, cautions and restructures.

We set out to evaluate the impact this state of change is making on communications functions by creating **our first 'Collective Perspectives' report**, to share the perceptions and analysis of our team, based on nearly 600 combined years of senior consultant insights. The report explores and explains some of the changing attitudes and challenges facing communications teams in the pharmaceutical industry.

I'd love to hear your thoughts - what resonates with you, and what are your insights in to how we navigate uncertain times whilst optimising the value communications can bring. Do drop me a line at angie.wiles@thedifferencecollective.com

Angie Wiles

CEO & Founder, The Difference Collective





How has the role of communications changed in pharma since the pandemic?

Previously, the size of pharma communications teams has expanded and contracted, primarily based on brand and pipeline performance. The pandemic changed this. Communications teams became critically important, and their role in delivering clear, consistent messaging at a time of unforeseen uncertainty demanded greater appreciation of their value. The communications seat at the leadership table was firmly established, and the function's role and influence have continued to expand.

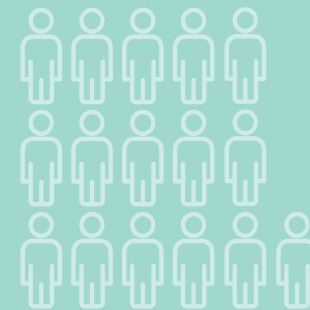
Q: How Integral are communications to your pharma clients' business functions?



7.1%
Integral



35.7%
Very integral



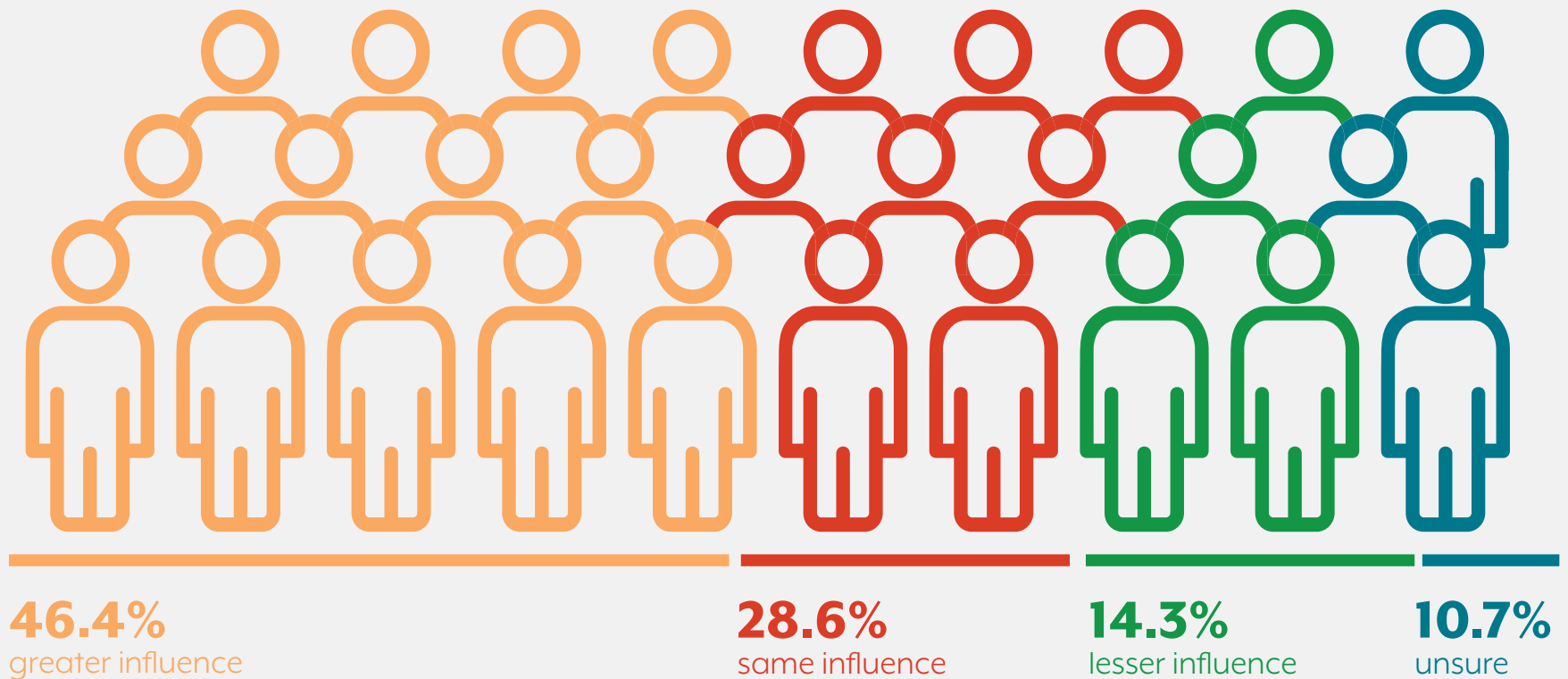
57.1%
Extremely integral

99.9% of surveyed consultants see communications as integral to pharma business functions.



The role of communications is evolving tremendously at a Global, regional and UK level. **46.4%** see communications teams now have **greater influence over leadership decision-making** than three years ago.

Q: Thinking about the last three years, do you believe pharma comms teams have a greater or lesser influence over leadership decision-making?





While it's fantastic to see that communications has an increased influence, the needs of the business for communications counsel and support aren't necessarily reflected in higher budgets or staffing for the communications function. Pharma is facing **increasing pressures and workloads** with **reduced headcount** and **budgets** - red flags for internal burnout over the year ahead unless appropriate support is identified at pace.

Q: Top three factors which will most significantly impact on pharma comms functions over the year ahead.



Reduced
headcount in-house



Increased
workloads



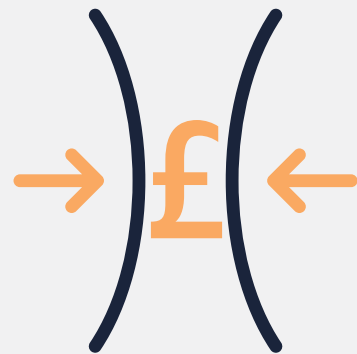
Decreased
Comms Budget

What's holding pharma communications back?



Restricted budgets, a limited ability to portray humanity and empathy in communications and the fear of regulatory reprimand are the most significant barriers to effective pharmaceutical communications. **79% have observed a moderate or significant budget decrease.**

Most significant barriers to effective communications in pharma communications.



Restricted budgets



Lack of humanity in comms



Fear of regulatory reprimand



How have audience and channel priorities changed?

The shift to digital healthcare, AI integration, an ever-strengthening imperative for customer and patient-centricity, faster-changing populations and demographics are all driving a shift in audience focus. Gone are the days of pharma seeing itself as accountable only to healthcare professionals and regulatory bodies.

Patient engagement is now the number one priority, with genuine desire and action to become more patient-focused. **32.1% believe patient engagement** will be the most significant area of communications growth for pharma. As the ABPI Code of Practice says, *'Patients are at the heart of our industry. We aspire to ensure that everything we do will ultimately benefit patients'*.

Q: Where do you see the greatest appetite for comms growth amongst pharma clients?



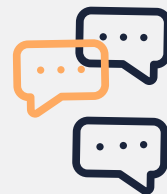
32.1%
Patient engagement



17.9%
Leadership comms



10.7%
HCP engagement



10.7%
Internal comms
& engagement



10.7%
Change &
transformation comms



Increasingly there is a desire to put people with lived experience at the heart of communications – and with good reason. Pharma companies seek to learn from people with personal experience of a particular health challenge and apply their insights to help deliver better patient outcomes. Listening to and learning from the voices of a diverse range of people through properly designed user research takes time and specific skills, but is transformational for the end output.

Patient listening enables meaningful connections. Increasingly, co-creation and partnership working is becoming the norm, meaning patients, carers and families are empowered to shape healthcare communications and delivery. Of course, this needs to follow local guidelines with transfers of value to patient organisations and patients disclosed annually - as set out in the ABPI Code of Practice.

By involving people with lived experience right at the start of patient engagement programmes, pharma can incorporate

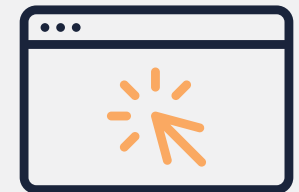
patients' and carers' thoughts and knowledge at every stage of activity. This means content can be more relevant, easily understood and acted upon by those we're trying to reach.

With the shift in audience comes a reprioritisation of channels. Not surprisingly, social media takes the number one spot. The pharma companies using social channels to the best effect are getting closer to their customers and consumers, using effective planning and creativity to make meaningful engagements, all while upholding the ABPI Code.

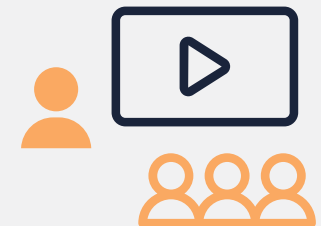
Which external comms channels have your pharma clients prioritised over the last year?



Social media



Own website



Congresses

What's happening internally?



It's taken time, but pharma has woken up to the power of internal communications in ensuring a consistent narrative amongst their biggest ambassadors – their employees.

With many pharma companies adopting a more flexible workforce since the pandemic, internal communications are more crucial than ever. Appreciation for developing a sophisticated internal communications strategy, recognising the diversity of channel mix, and the need for creativity to cut through the volume of internal communications are all making a significant difference to demand for internal communications expertise. **Visual storytelling, in particular, is achieving a lot of rapid and successful engagement - it's proving its worth to influence and inform busy teams with competing priorities.**



A DIFFERENT WORLD



The demands placed on communications leads are monumental at a time of reduced headcount and diminishing budgets. More than ever, the industry needs agile solutions, rapid response, creativity and quality of delivery. Pharma is changing at an extraordinary pace, and it needs communications teams at the top of their game to lead the charge.

We're confident that the role and influence of communications will continue to expand over the year ahead and **remain integral to pharma business functions**, supporting the resilience and success of organisations in an always complex and challenging healthcare landscape.





ABOUT THE DIFFERENCE COLLECTIVE

The **Difference Collective** is a team of outstanding senior healthcare communicators, but as our name suggests, we're not a traditional healthcare communications agency. Purpose-built around client needs, delivering exceptional results by taking a Different and highly responsive approach. The Difference Collective brings together talented, driven, top-flight independent consultants with stellar track records and specialist expertise, **to give clients exactly the resources they need, when they need them.**



ABOUT COLLECTIVE PERSPECTIVES

Collective Perspectives is a new report developed by The Difference Collective, based on the insights of our senior consultants, **combining nearly 600 years of experience in healthcare communications.**

Collective Perspectives assesses the changing attitudes and challenges facing communications teams in the pharmaceutical industry in 2023.

Data was collected from 28 Collective consultants during June 2023.

