

WHITE PAPER

Beyond cookies:

Reaching high-quality patient audiences
in a privacy-first environment

Phreesia

Life
Sciences

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Executive Summary

Massive changes have disrupted the marketing world over the past few years as new legislation and major technology player reforms have reshaped the consumer privacy landscape. And while some of the biggest changes are still on the horizon—Google’s planned 2023 phaseout of third-party cookies, for example—now is the time for marketers to prepare.

Because life sciences is a highly regulated field that has always prioritized patient privacy, it is better positioned than many other industries to adapt to tightening privacy restrictions. But pharma marketers will still be impacted by the shift away from common user-tracking mechanisms and should be proactively strategizing new ways to reach their audiences that don’t rely on fingerprinting.

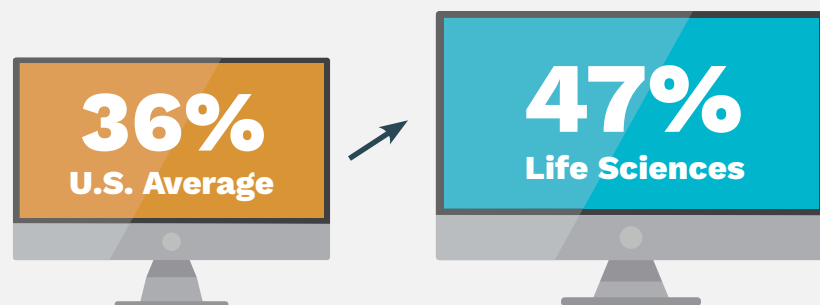
This white paper will explore how marketers can generate data, contextually target and shift spending to build and reach high-quality patient audiences in the emerging privacy-first environment.

Introduction

Marketers may have felt a reprieve with Google’s June 2021 announcement that it would delay its removal of third-party cookies until 2023. But while that change might still seem far off, the tech industry’s shift away from cookies has already begun. Mozilla Firefox and Apple-owned Safari nixed third-party cookies in 2019 and 2020, respectively, and while those browsers own a smaller share of web browsing than Google, the pharma industry is already feeling the effects of those decisions.

In fact, life sciences brands have been disproportionately affected by the demise of cookies, according to data from Klick Health. Life sciences see more traffic from Safari than the national average; Klick pegged the industry’s Safari share at 46.5%, compared to the U.S. average of 36.3%.

Apple Safari browser usage by industry



Source: Klick Health

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“Early last year, we started seeing the impact of less media delivery or inbound retargeting traffic from Safari, and that’s because third-party cookies were blocked,” said Kamran Shah, Klick’s Executive Vice President, Delivery and Solutions. “The blocking of cookies isn’t coming—it’s already happened.”

And unfortunately for those in search of a quick fix, certain fingerprinting methods beyond third-party cookies have so far met with similar fates at the hands of technology vendors as well. Apple’s recent iOS updates have already blocked device identifiers and the use of IP addresses for tracking user activity as part of the company’s efforts to protect user data.

“Both from a legislative and technology vendor standpoint, there is a push to continue to make fingerprinting harder and harder over time,” Shah said, suggesting that marketers need to “rethink how we work.”

“What’s really important is that marketers determine what their exposure is to third-party cookies and fingerprinting beyond third-party cookies and adjust their plans,” he added.



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—Kamran Shah,
EVP of Delivery and Solutions, Klick Health

The good news for life sciences marketers? The heavily regulated pharma industry is already used to prioritizing user privacy.

Most of the strategies that pharma companies deploy have been relatively privacy-centric, Angelina Eng, Vice President, Measurement and Attribution at IAB, said. They’ve always taken a very mindful approach that takes compliance, regulation and consumer perception into account.

“There’s a natural mindset toward looking at this and thinking about the right way to solve it,” Shah agreed.

The challenge for pharma marketers, therefore, won’t be prioritizing privacy in a changing landscape, but rather ensuring that they’re able to do so without compromising audience quality. And to Shah, it all comes down to relevance.

“We want to reach patients and physicians that have a propensity or need to address a specific indication,” he said. “That’s the foundation that we all have to align on.”

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Alternative one-to-one approaches

One big advantage cookies brought to the table was their ability to help marketers target consumers one-to-one with personalized content rather than delivering mass messaging. Without the individualized data third-party cookies provide, one-to-one messaging will become more difficult—but not impossible. And while one-to-few and one-to-many strategies have always been and will continue to be part of the mix, one-to-one messaging remains ideal.

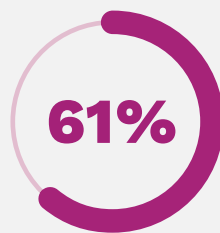
One way life sciences companies can take one-to-one targeting into their own hands? Build out first-party data strategies of their own. “It is really going to be a shift to owning the experience for a company more wholly and relying less on others, which is really what cookies enabled us to do,” Shah said.

That might translate to patients filling out a form on a brand’s site or on another brand channel to request information to help them stay on their medication or manage their condition. Those patient responses could then help that brand create models designed to reach similar audiences.

But if companies want to capture first-party data, they’re going to have to think about what types of materials patients will value—and how they can present them in a way that compels patients to take action.

So far, many drugmakers have struggled with meeting that goal. The pharma industry spends more than \$5.7 billion annually on patient support programs, which include educational resources and prescription cost-savings information. But 61% of patients don’t see much value in such programs, according to Phreesia, which surveyed nearly 5,000 patients checking in for doctors’ appointments in February and March 2021. What’s more, only 3% of eligible patients are currently using patient support programs, and just 8% have ever used one.

How patients view support programs



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Source: Phreesia patient survey

The pharma industry's ability to collect first-party data, therefore, will hinge on its ability to more effectively promote awareness of its offerings and communicate their value to patients. If companies can reach patients with worthwhile content, they just may find an audience ready and willing to engage.

Contextual targeting

Without third-party cookies in the mix, experts also expect to see a return to contextual targeting, which is targeting based on the content of a webpage where an ad appears, rather than a user's past online behavior. For drug companies, this could mean placing an ad for a psoriasis medication on a webpage featuring a psoriasis article, for example.

"Contextual targeting is going to continue to be kind of the North Star when it comes to this," Eng said.

Eng expects this approach to be far more popular among life sciences companies than a first-party data approach because of drugmakers' concerns about consumer perceptions. Life sciences companies know that people are very sensitive to the way the industry collects data, she noted. "If you have hemorrhoids or cancer or things like that, you may or may not want [a drug company] to know that you have it."

But for contextual targeting to succeed, brands will have to make sure that publishers that display their ads correctly categorize their content. If they do, they'll be able to create audiences based on disease type, whether a user is a caretaker or a patient, or whether they're currently having symptoms.

Brands will also want to find out how publishers are leveraging the first-party data they collect through analytics or first-party cookies for targeting, Eng added.



Spending shifts

As marketers look for new digital options in a post-cookie universe, they may also want to consider moving their marketing spend to other channels, experts suggest.

Shah pointed to video, for example, which “has super high engagement and is a pretty targetable channel and medium through certain vendors because a lot of bigger streaming services have authenticated, logged-in users.”

Eng agreed that video and print would continue to be a big factor for life sciences companies and that some organizations may move their inventory to connected TV. But she also expects the industry to find innovative ways to give users more information, better experiences and more educational materials to help them pre-diagnose and set up more productive conversations with their healthcare providers.



You’re going to see more brands shift toward contextual, and there will be ways to target or place ads in places that are not only contextually relevant, but also, from a sentiment standpoint, in the range clients are comfortable with.”

—**Angelina Eng,**
VP of Measurement and Attribution, IAB

Companies looking to target patients before their medical appointments also may want to consider messaging at the point of care, where they can connect with patients just before they meet with their providers and prompt them to engage in shared decision-making.

Point of care (POC) is naturally targeted. Instead of placing an ad for a psoriasis medication on a webpage featuring a psoriasis article, for example, a marketer could place it in a dermatologist’s office, targeting patients’ known medical conditions. That message is more likely to reach those who have the condition than an online article is, and to do it at a critical point in their treatment journey. POC companies’ access to patients at these key moments—and in some cases, their access to first-party health data—gives them a leg up in a post-cookie landscape.

Eng further predicts that this kind of messaging will make its way beyond doctors’ offices and medical centers, appearing on in-store devices in at pharmacies and stores like Walmart.

“It will be interesting to see where digital becomes embedded in your overall experience, even outside of your devices,” she said.

Key takeaways

For marketers, the migration to a privacy-first environment represents uncharted territory, and that’s an important thing for them to keep in mind. Experimentation will be key moving forward as marketers head into the unknown, and they’ll want to avoid putting all of their eggs in one basket as they determine which strategies work and which don’t.

But that doesn’t mean they should abandon everything they already know about finding and reaching high-quality audiences. First-party data will continue to be vital for reaching the right patients, and companies will either need to build out their own infrastructure to capture it themselves or partner with publishers place their ads contextually. And some of the tactics marketers already use, including one-to-one patient outreach and point of care, may become even more important as third-party cookies disappear. Each of these approaches can help marketers continue to reach and engage the right audiences as they seek to improve the patient experience and drive better health outcomes.

About Phreesia Life Sciences

Phreesia empowers life sciences companies to connect meaningfully with clinically relevant patients, delivering targeted health content in a one-to-one setting. Our PatientConnect offering identifies and motivates the right patients to initiate meaningful brand conversations, and our PatientInsights product enables our clients to better understand their target patient populations.

Phreesia meets patients where they are, both virtually and in-person, and reaches them at multiple touchpoints throughout their healthcare journey.

To learn more about Phreesia Life Sciences, visit lifesciences.phreesia.com

End notes

- 1) [“An updated timeline for Privacy Sandbox milestones,”](#) *The Keyword*, June 2020
- 2) [“iOS 15 disrupts plans for a cookie-less future,”](#) *Klick Ideas Exchange*, August 2021
- 3) [“Apple advances its privacy leadership with iOS 15, iPadOS 15, macOS Monterey, and watchOS 8,”](#) *Apple Newsroom*, June 2021
- 4) [“America’s biggest charitable giving: \\$5.7 billion in patient assistance programs,”](#) *Patients Rising Now*, November 2019
- 5) [“Industry Perspectives: Expanding awareness of patient support programs,”](#) Phreesia, June 2021