

SOCIAL CHECK-UP

2023



Ogilvy HEALTH

FEBRUARY 2023



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INTRODUCTION



It comes as no surprise that 2022 marked a pivotal moment in social media use.

It comes as no surprise that 2022 marked a pivotal moment in social media use. From Elon Musk's takeover of Twitter to the unstoppable rise of TikTok and the proliferation of alternative platforms such as BeReal and Mastodon, social media continues to be dynamic. While pharma companies are continuously reviewing which platforms to invest in, they are aligned in recognising the importance and value of social media overall as a key channel for engaging with stakeholders and building and maintaining corporate presence.

For healthcare professionals, social media has become an essential tool for collaborating and learning, allowing them to access reliable information, and fast. With over 40% of all scientific literature getting tweeted¹, the synergy between the scientific community and social media is powerful.

Social media is central to supporting people living with chronic diseases, with communities across the world sharing experiences and advice. It can be invaluable

in connecting people living with rare diseases and removing some of the associated isolation. Pharma companies have been eager to support these communities by building on their long-standing relationships with patient organisations and advocacy groups.

It's been a while since we last updated The Social Check-up (since 2020, in fact!) and much has changed in this time. In previous editions, we reported that social media was no longer a 'nice to have' for the pharma industry, but a necessity. This time around we have focused on the maturity of the pharma-owned platforms and looked in more detail at the strengths and weaknesses of the social media efforts. All the companies we audited have a mature presence and are performing effectively across platforms. We found incremental gains in effectiveness when we examined performance across six key capabilities, including corporate identity, content strategy and paid social. Companies have had three years to grow and mature, after all.

It's not about improvements in the number of followers, but about what companies have done to nurture and engage with communities. Are they taking full advantage of the unique features each platform offers? And do they really understand their audience's needs and behaviours online?

Our proprietary methodology has compacted the results into a handy report that will reveal all.

¹Waltman L, Pinfield S, Rzayeva N, Henriques SO, Fang Z, Brumberg J, Greaves S, Hurst P, Collings A, Heinrichs A, Lindsay N. Scholarly communication in times of crisis: The response of the scholarly communication system to the COVID-19 pandemic.

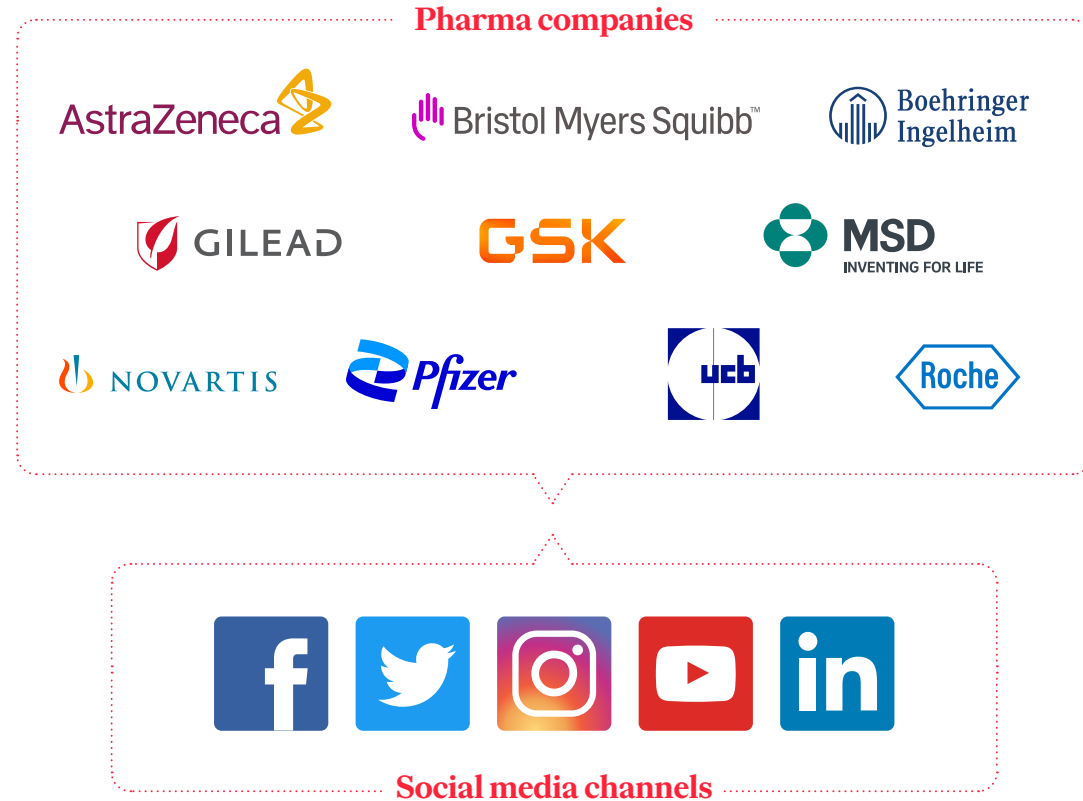
METHODOLOGY



Scope of research

For the Social Check-up 2023, we reviewed the global corporate social media channels of ten pharma companies. Our research encompassed Facebook, Instagram, Twitter, YouTube, and LinkedIn.

The companies reviewed were AstraZeneca, BMS, Boehringer Ingelheim, Gilead Sciences, GSK, MSD, Novartis, Pfizer, UCB, and Roche.²



²The review focused on content between 1st August 2021 - 31st July 2022 (with Gilead Instagram data only available from March 9th, 2022)

This report presents a comprehensive look at the maturity of each Pharma's social channels, but naturally there are some limitations:

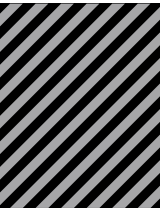
- We looked at key areas for each category that indicated there was evidence of a mature social presence, but this was limited by what we could audit from a public perspective.
- Of the pages available, some of them had limited historical data.
- The technology leveraged for the paid social category only identifies organic posts which were boosted, dark paid posts were visible via Facebook ads library but limited to currently active ads.
- A company's paid media targeting strategy can be speculated but not confirmed. Budget allocated is unknown.
- We only audited Facebook, Instagram, and LinkedIn ads due to Twitter and YouTube not disclosing ad information from a public perspective.

How we assessed social maturity

We've developed a unique scoring system to assess the social maturity of each company's social channels. Each received a score out of a possible 30 points for its social media efforts. Five points were available for each of the following six categories:

<p>Corporate identity</p> 	<p>Social content strategy</p> 	<p>Social experience and design</p> 
<p>Paid social</p> 	<p>Influence</p> 	<p>Social community</p> 

Our analysis gives us an indication of the strengths and weaknesses of the companies' social media efforts across these capabilities.



TOTAL SCORES

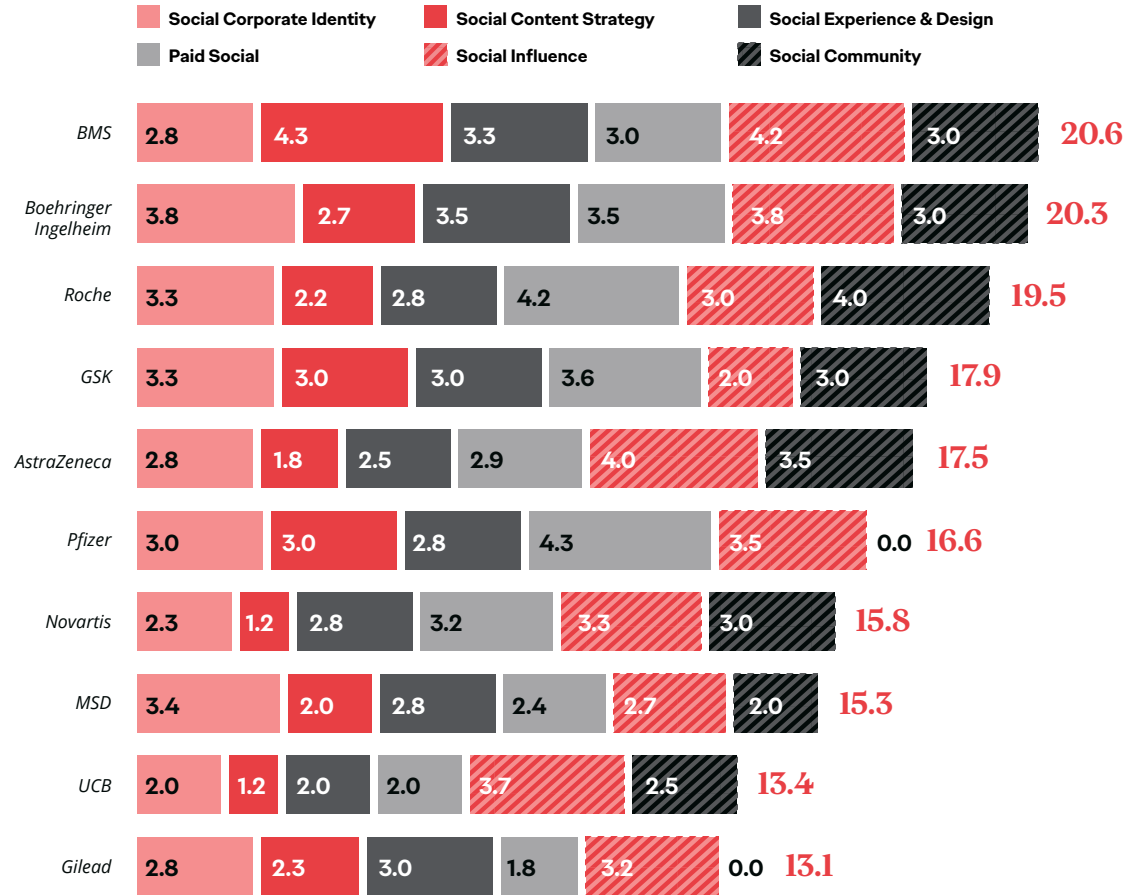


BMS came up trumps, with a score of 20.6 out of a possible 30 points. Boehringer Ingelheim followed closely with 20.3 (just 0.3 points behind), and Roche 19.5 points.

While the top three companies were mature in most categories, it's important to note that there weren't clear leaders across the board:

- BMS had room for improvement in corporate identity and paid social, while Roche ranked lower for social experience and design and for social influence in corporate identity and paid social
- Gilead came in joint third in the social experience and design category, but, along with UCB, was less mature in other categories including corporate identity

Even if you have a mature social media presence overall, it pays to make sure that you're shining in every category.





SOCIAL
CORPORATE IDENTITY



What is social corporate identity?

This review looked at consistencies across corporate channels (social media platforms and corporate websites) and alignment with corporate branding in terms of tone of voice and visual identity.

Building and maintaining an authentic and consistent corporate identity, is key on social media, as it allows audiences to build an association and affiliation with your company.



The average score for this category was 3.0 out of a possible 5 points. Boehringer Ingelheim led the way. MSD followed in second, with GSK and Roche coming in joint third

Visual identity

Overall, most companies showed evidence of a strong visual identity across social channels and content, but across the board we found a similar look and feel, with little to differentiate one company from another. MSD showed a mix of people and animation, with a clear visual identity linked to corporate colours and branding.

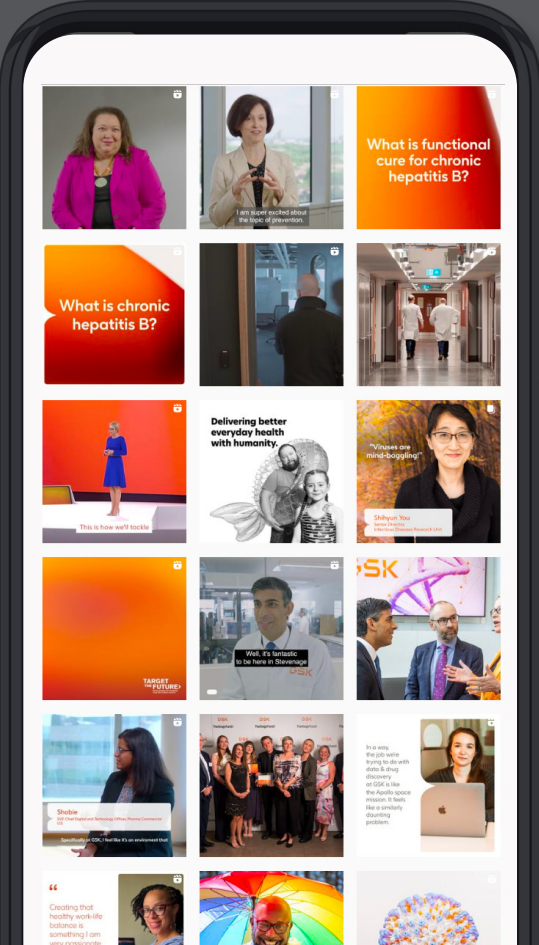
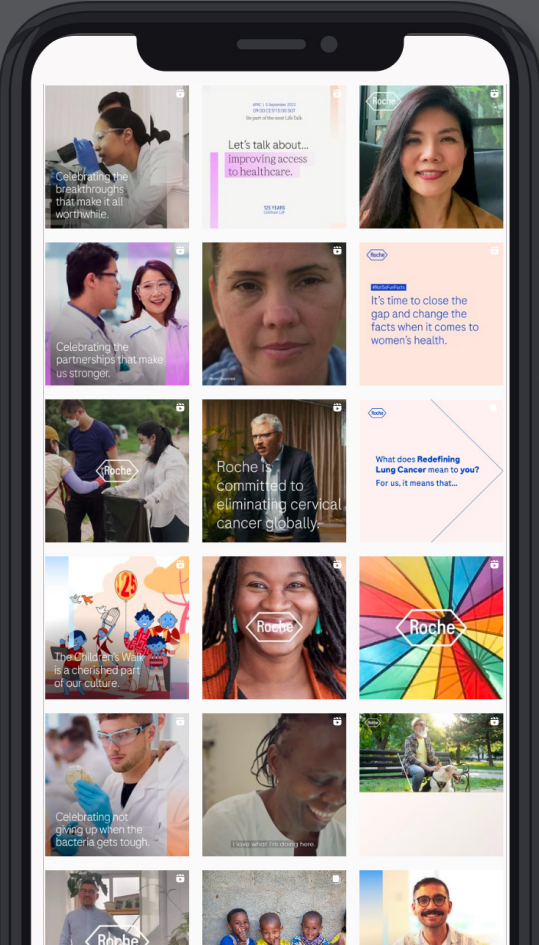
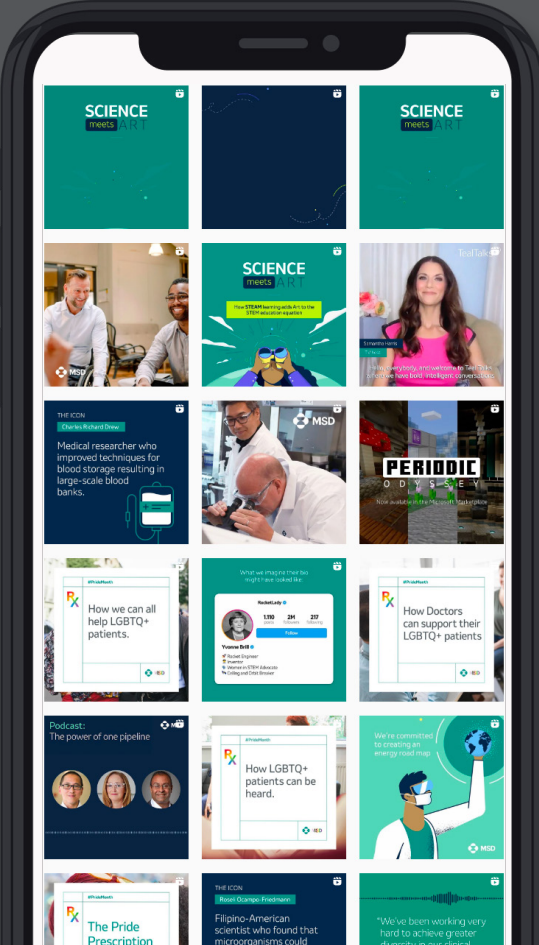
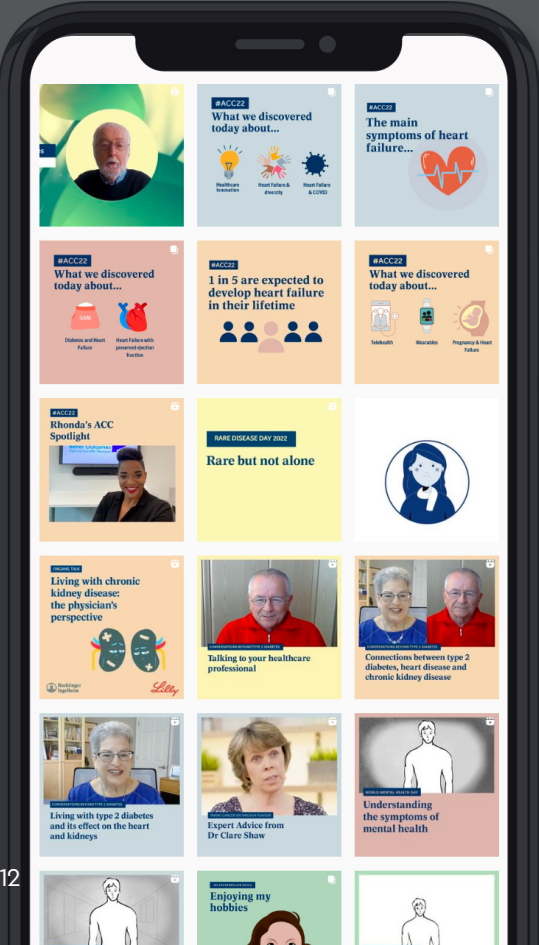
Visual identity is essential, and consistency is key to helping establish and maintain the company's look and feel. This doesn't mean that one colour needs to be used – establishing a set of complementary colours and tones works well.

Boehringer Ingelheim

MSD

Roche

GSK



Tone of voice

We found a similar tone of voice across all companies. A strong focus on using an educational and formal tone was present, but Boehringer Ingelheim also differentiated its voice across specific channels. On Facebook, Instagram, and Twitter, Boehringer Ingelheim used a more conversational tone, complete with emojis. This helped set them apart from other companies in creating their own unique tone of voice that was relevant for the channels and audiences.

OGILVY HEALTH'S TIPS FOR SOCIAL CORPORATE IDENTITY



#1

Ensure that your visual identity and tone of voice are consistent across all channels.

- The elements that make up your corporate identity (colours, tone of voice, logos) should shine through in your content and should also be adapted to suit the needs of your audience.

#2

Once you have established a consistent visual identity and tone of voice, you can add flourishes that are valuable in increasing engagement on specific platforms. It's important to remember that most people will not look at a company's social profile as a whole and are more likely to see a post or interaction in their newsfeed.

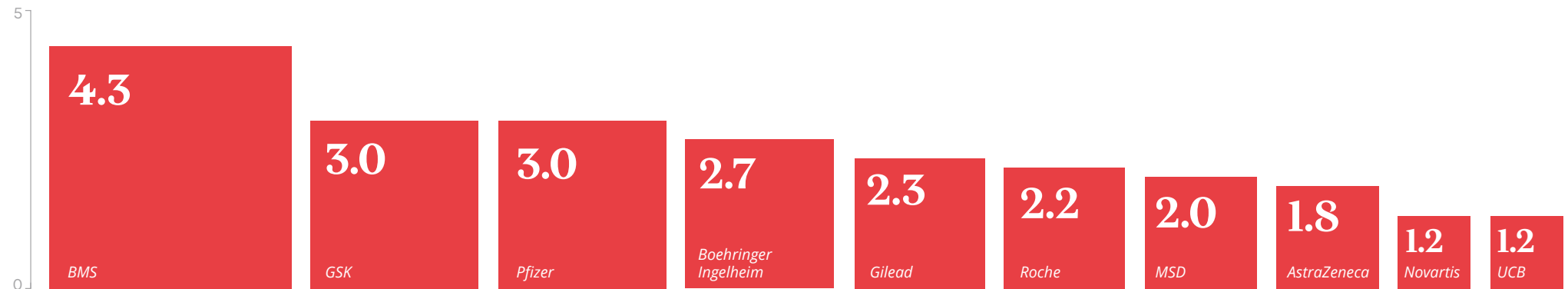
- LinkedIn tends to be more professional than Facebook, so you might want to be more formal. TikTok lends itself to organic content, so tailor your tone and content towards that.

SOCIAL CONTENT STRATEGY

What is social content strategy?

A well-planned content strategy ensures that you are coordinating, creating and distributing content at the right time and in the right way for your audience and business needs. For this category we looked at some of the key areas that indicated there was evidence of a well thought out content strategy.

We analysed the extent to which content was used to connect with audiences in specific moments, such as health awareness days and congresses. We looked at whether companies were adding value by sharing useful content from other sources (e.g., user-generated content). Finally, by analysing the types and formats of the content shared we were able to assess whether the content supported a breadth of objectives across the marketing funnel (awareness, consideration, advocacy).



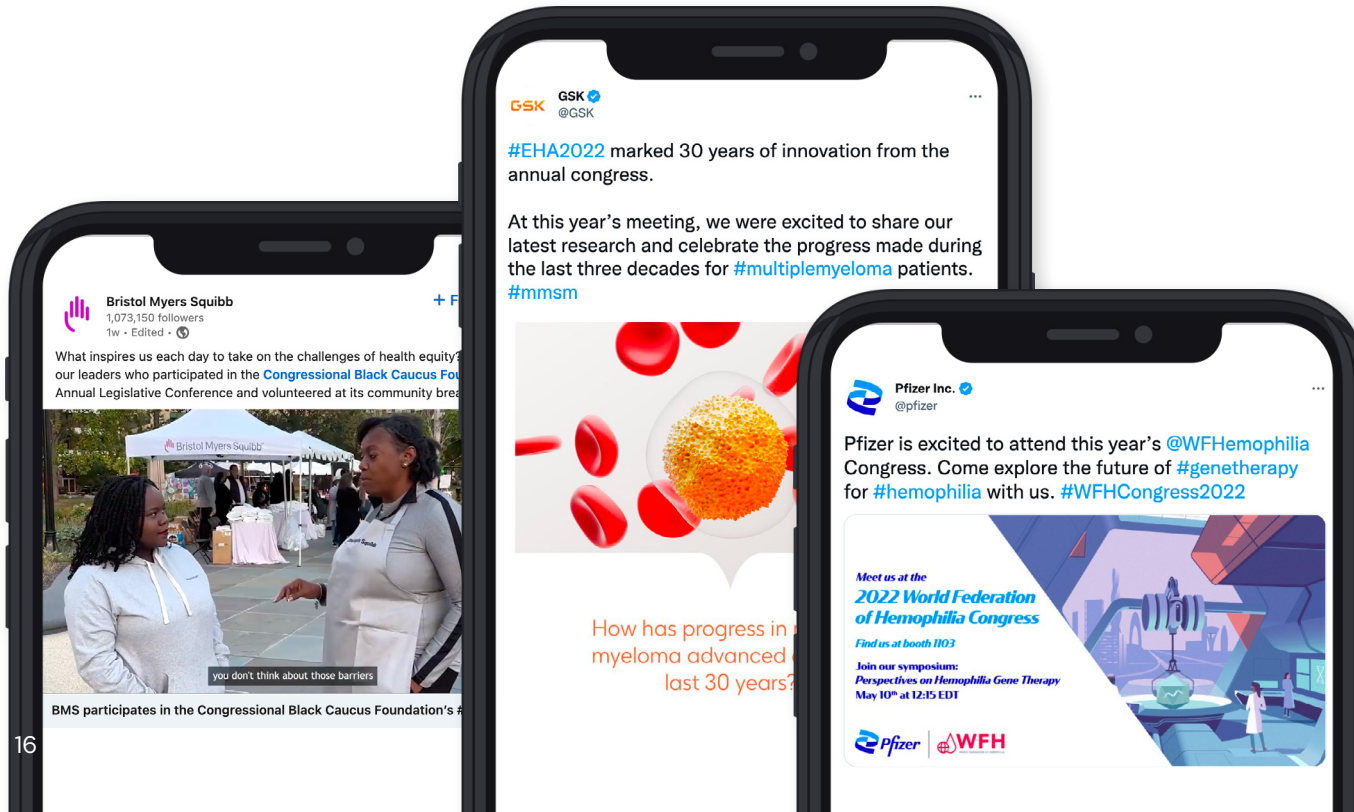
This was the lowest-scoring category overall, so there is plenty of room for growth. The average score was 2.4 out of a possible 5 points, and four companies scored 2 and under. BMS stepped up to the plate with a score of 4.3, a full 1.3 points ahead of GSK and Pfizer in second place.

Content planning

Whilst all companies used social to support milestones and congress activation, it all felt remarkably similar in terms of topics and ways of sharing content.

It's good to keep your audience updated about content they might have missed at congresses, but there is potential for so much more. When it comes to planning content, consider the milestones that your audiences will be interested in and those that are most relevant to your business.

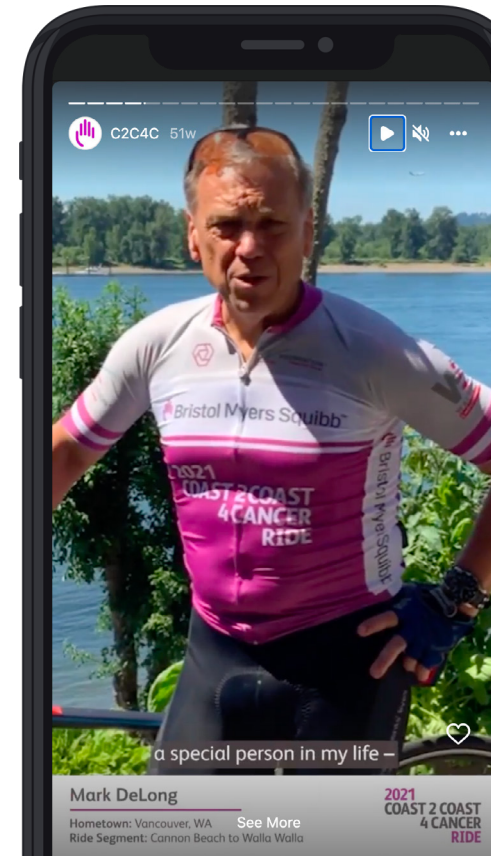
GSK stood out when it came to effective content planning, with evidence of cultural, health-specific, national and international and company moments.



Content sources

BMS took to the stage when it came to sharing not just their own content but also adding value to different sources of social content, including curated podcasts and employee user-generated content.

When it comes to creating content for your social channels, it doesn't have to be your company creating all of it. In fact, sharing content from other sources, including user-generated content from employees, healthcare professionals and patients you work with, helps to show authenticity and builds trust.



OGILVY HEALTH'S TIPS FOR SOCIAL CONTENT STRATEGY



#1

Your audience is your inspiration.

- Through undertaking social listening around a disease area or analysing specific audience groups, you can gather insights on what really interests your audience. To increase the impact of your content, communicate what they want to hear, rather than broadcasting what you want to say.

#2

Consider how people consume content.

- In general, people consume social content on the go, whilst multi-tasking, on their phone, etc. If you're posting with a congress attendee in mind, they're unlikely to watch a video or read long post copy, as they are likely walking between symposia sessions, or waiting for a meeting to start. Always consider the environment your audience is in.

#3

Work with patient advocacy groups rather than competing with them.

- Resharing content from advocacy groups will broaden the reach of their communications. This can earn you goodwill with the community you're supporting, which is often the community you are also trying to communicate with.

#4

Remember you're telling some of the best stories.

- Healthcare has some of the most interesting and engaging stories to tell. Immerse your audience in an experience, capture their attention and spark a connection. Your content will go so much further.

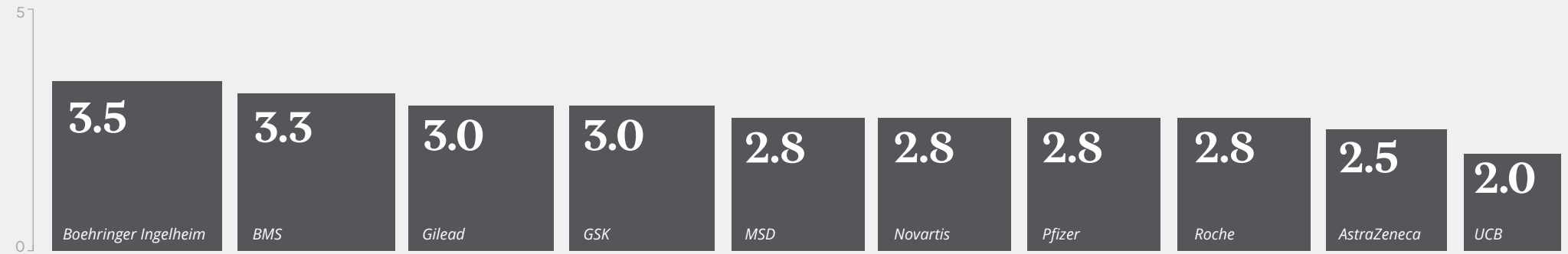


SOCIAL EXPERIENCE AND DESIGN

What is social experience and design?

Effective social experience and design covers a range of areas including practical and cultural needs. For this review we looked at whether content was designed for social media (mostly mobile) and user experience, using innovative social formats and simple messaging. It also looked at whether the content was written, and the assets designed, to be inclusive and show a breadth of diversity.

Companies that adopt a mobile-first creative and design approach for content and produce inclusive social media communications generate stronger engagement and impact.

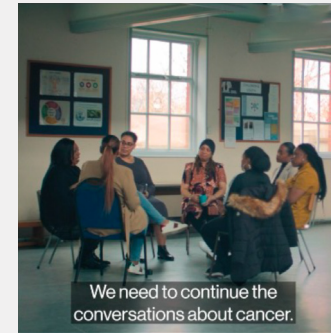
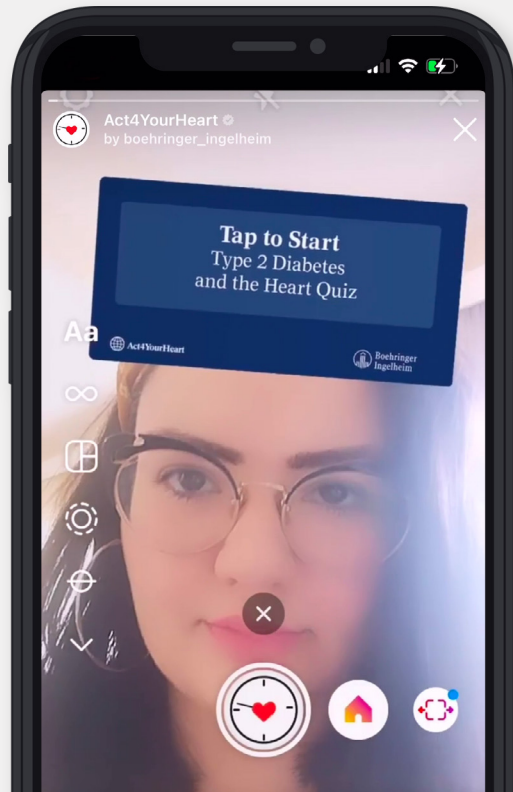


There was a lot of room for improvement, with the highest score in this category being 3.5 out of a possible 5 points, and an average of 2.9 points. Boehringer Ingelheim rose to the top, followed by BMS, with Gilead and GSK in joint third.

Optimised for mobile

Boehringer Ingelheim designed content for mobile and took advantage of the various capabilities of the platforms. For instance, stickers, reels, filters, and subtitles were used on Instagram. On the other hand, none of the pharma companies were using Instagram Guides, which was a missed opportunity to share curated, scrollable content with their communities.

Building content for how people consume it – mostly on mobile – and to suit different experiences (on-the-go, sharing with friends, whilst in bed, etc.) is key to a mature social presence. It allows you to create different assets and formats to suit all needs and reach people in the right way, at the right time and connect with them.



Inclusivity

Inclusivity on social posts was commonly associated with Pride and moments related to equality. AstraZeneca posted about diversity in relation to science and careers. Pfizer highlighted diversity in its #breakthebias campaign. Novartis shared stories from employees around Pride Month. BMS was particularly good at showing a wide breadth of diversity in-feed, and as a result felt authentic to users. This was amplified by the company sharing its support for diverse companies, from a career and cultural point of view.

Inclusive marketing is key to championing diversity, addressing the specific needs of diverse audiences and resonating with all. An inclusive approach should be at the core of every company's social media strategy.

OGILVY HEALTH'S TIPS FOR SOCIAL EXPERIENCE AND DESIGN



#1

Think about the way that you, as a social media user, consume content – mobile first.

- Your content is always going to be competing with something else. Other healthcare companies, entertainment brands like Netflix, even relatives sharing holiday pictures. You only have a short amount of time to capture attention.
 - Use short and memorable asset titles to stay present in your audience's mind.
 - Use strong colours to draw your audience in.
 - Chunk content – your audience will be more motivated to read content if it is chunked into manageable pieces. This also improves readability and accessibility.

#2

Using the right format for your objectives and placements is critical.

- The specs for an Instagram Feed post vs Reels vs Stories are all different. Every single one of your assets should be optimised for the channel it is on. You can find the channel specifications here:

Meta,

LinkedIn,

Twitter,

TikTok

#3

When considering diversity and inclusion, think beyond awareness days and ask yourself if your content is stereotyped or not. In every single piece of content, you should consider:

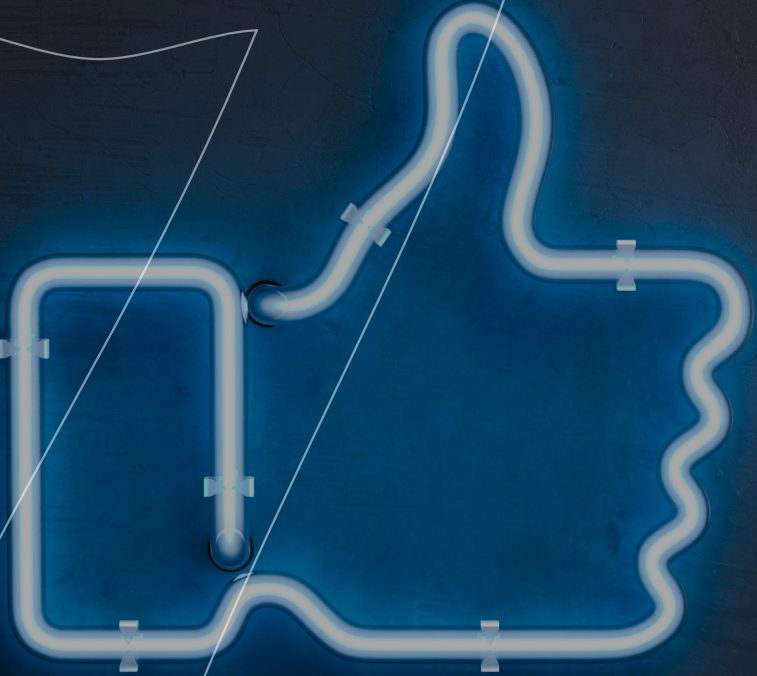
- Presence: who is being featured in the communication?
- Perspective: who is framing the story?
- Personality: is it an authentic story that you're telling?

#4

Be authentic. Authenticity is easy to recognise – it won't feel robotic or forced. When considering authenticity, the channel should also be a consideration.

- Your audience can recognise stock imagery and video. On channels like Instagram and TikTok, it's likely that this type of content will be skipped over, however, on a channel like LinkedIn which is more professional in nature, polished content may help with credibility.
- Keeping authenticity at the top of your mind when creating content will differentiate your content from others and will get your message across.

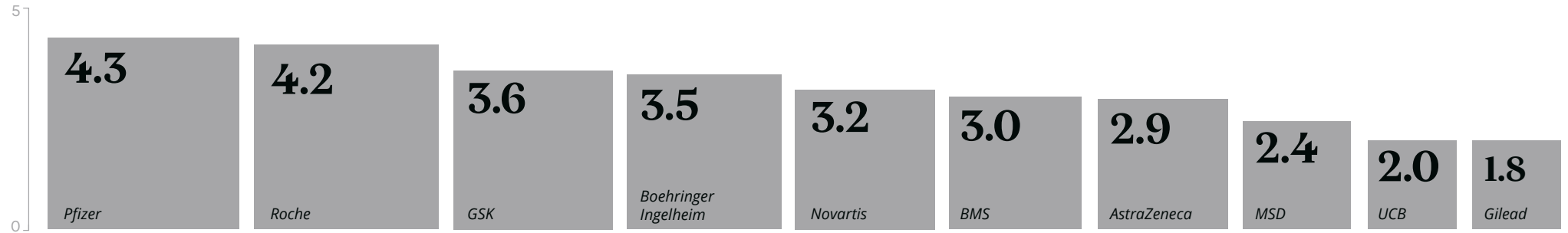
PAID SOCIAL



Paid social?

This review audited whether social was one of the key channels in the company's paid media mix. It looked at the extent to which paid media was organised into always-on layers versus peak campaigns and whether the company used different types of ads to drive awareness and reach.

Budget for content creation will in essence be wasted if no one sees what you make. As funds will always be finite, allocating a proportion of your total budget to paid will support your overall campaign ambitions. Within the current climate, it's more important than ever to take time to carefully assess paid social opportunities and consider the long-term impact of your paid social activities.



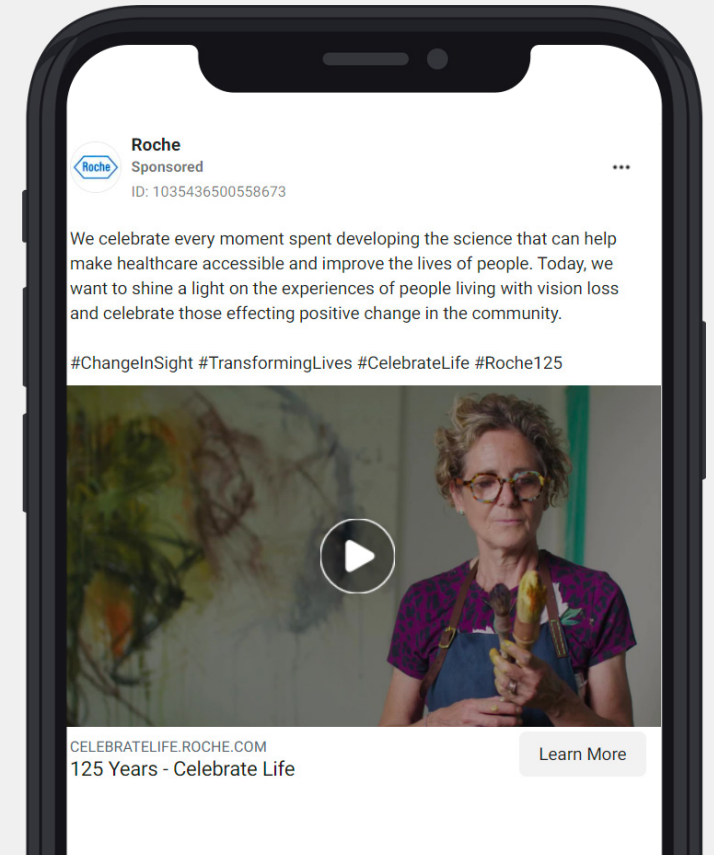
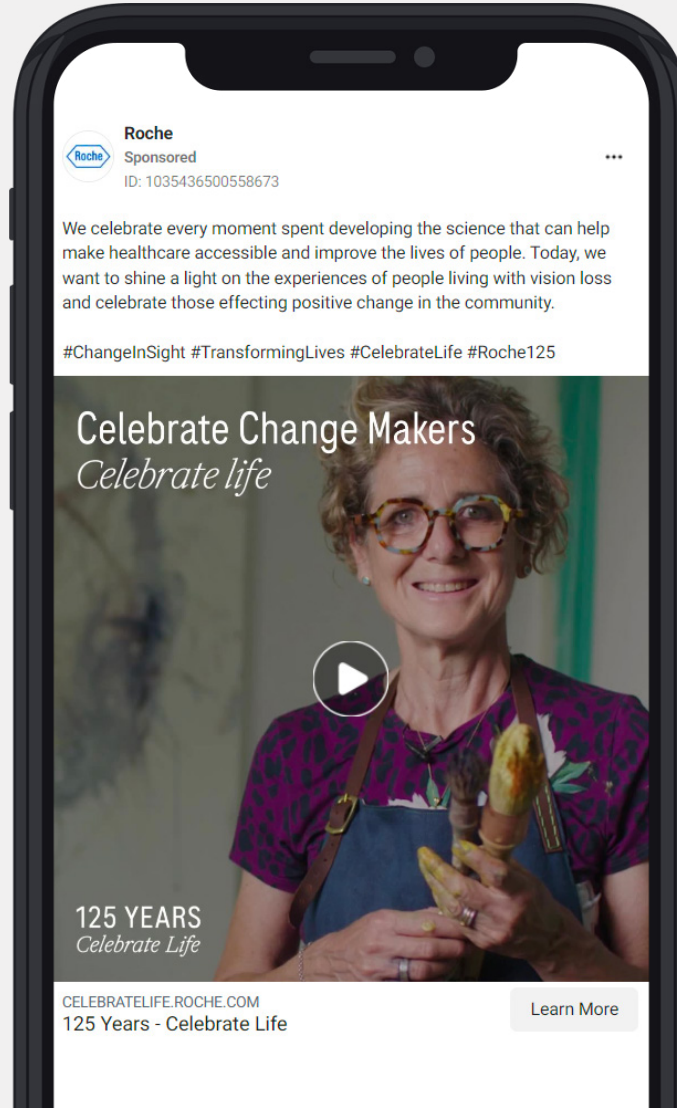
Pfizer took first place with Roche coming in second (4.3 and 4.2 out of a possible 5 points respectively). Interestingly, the three companies that scored the lowest total marks overall also scored the lowest marks in this category.

Paid strategy

Pfizer leveraged paid media best with an always-on and peak campaign approach, driving awareness and consideration with clear call-to-actions and showing evidence of using paid media to target different audiences with different visuals.

Roche had a clear A/B testing strategy – for example, on Facebook and Instagram, Roche provided multiple versions of an ad (different images, text and platform-specific preferences) so that the platform could automatically create the right combination for the audience.

An always-on approach means that the company is always using paid media to engage with its audience, regardless of whether there is a push for a key campaign or not. This is useful for building company awareness. Peak campaigns are concentrated efforts of posting, based on a specific milestone, which can drive impressions and inspire actions. A/B testing is an important part of a paid strategy, as it will provide more insights for specific audiences than relying on organic results from your social media page.



OGILVY HEALTH'S TIPS FOR PAID SOCIAL



#1

Allocate a minimum of 20% of your budget to media spend.

- Your content may be beautifully crafted, but all that effort will go down the drain if there is not enough paid budget to amplify it.

#2

Avoid using the same content for each phase of the funnel, or for different paid objectives.

- Always match your post to your objective, for example avoid using video in every stage of the funnel and use a static image when driving traffic.

#3

Never assume the type of content your audience will prefer – test!

- Use variants in your paid campaigns to understand the type of content that your audience resonates with the most. Would they respond better to a call-to-action which is a statement, or one which is a question?

INFLUENCE



What is influence?

This review looked at the extent to which companies were working with external influencers to support their long-term strategy and generate authentic and trustworthy content and experiences. It also looked at how the companies were utilising internal influencers and stakeholders including employees and c-suite management.

Influence allows pharma to connect with patients and healthcare professionals in a way that no owned platform can. Working with external and internal influencers allows companies to tap into existing communities to gain insights and build trust and authenticity.

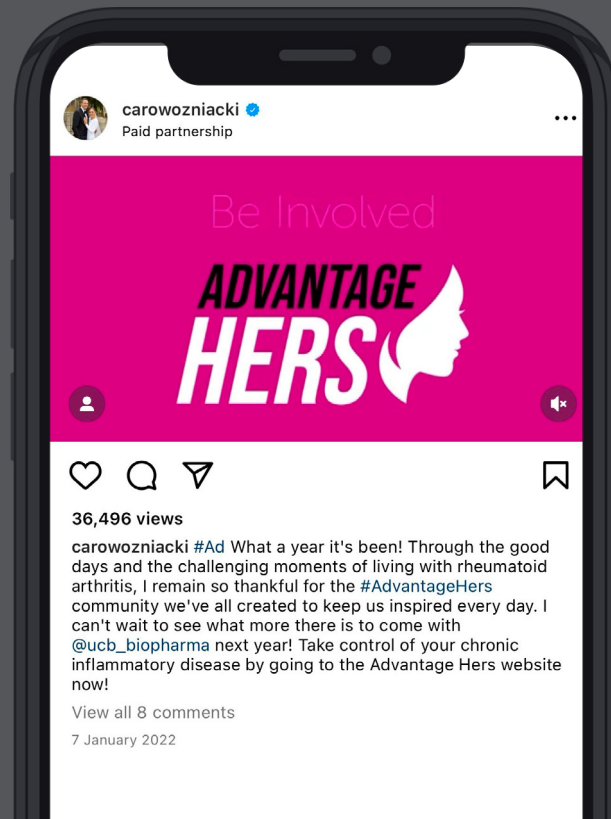
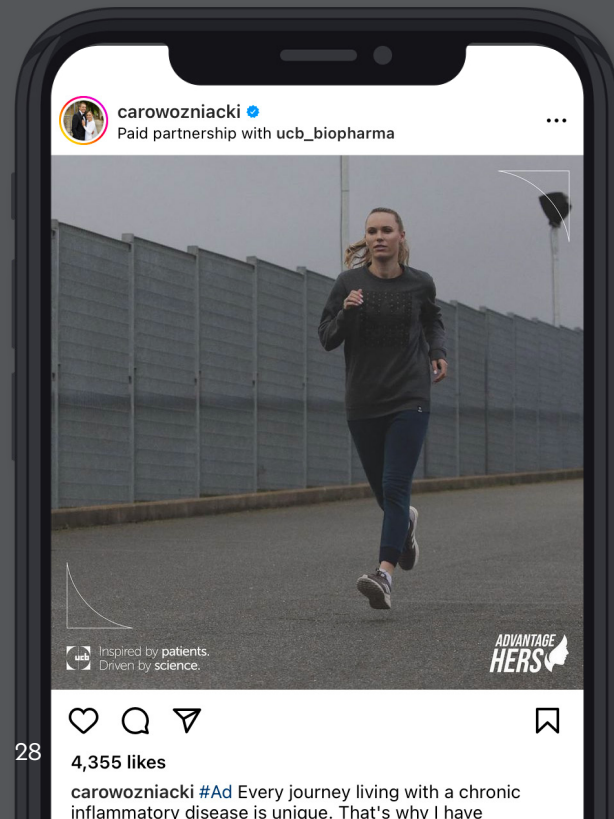


This was the highest scoring category with an average of 3.3 out of a possible 5 points, but there was still room for improvement. BMS and AstraZeneca both achieved 4 and over, with BMS scoring the highest with 4.2 points.

Influencer strategy

Our research shows that most companies collaborate with influencers for one-off activations and ad-hoc events. UCB had a first-class example of an influencer partnership by working with an athlete with 1.3 million followers on Instagram. Together, they created a discussion guide on her personal social channels designed to empower women living with chronic inflammatory diseases.

Pharma is still slow to take up working with influencers effectively, but people trust people more than companies, especially when it comes to health. Any social media strategy should include influence at its core.



Internal influencers

AstraZeneca featured internal influencers and stakeholders for recruitment purposes to attract talent into the company. They also worked with employees, including the Head of R&D in China, to share content about the R&D Postdoctoral Challenge, inviting final year MD and/or PhD students and postdoctoral researchers to propose their own innovative ideas to accelerate drug discovery and development.

Employee advocacy and building employee profiles externally is a powerful way to increase reach and build credibility and trust with your target audiences.



OGILVY HEALTH'S TIPS FOR INFLUENCE



#1

Influence is more than a one-off activation.

- Your influencer activity should encompass a strategy and toolkits to create effective, compliant, long-term partnerships.
- Piloting a campaign in one market can offer the opportunity to evaluate and learn.

#2

Know the regulations and market-specific compliance guidance.

- Speak to your internal legal and compliance teams and local regulatory boards to define a clear process and a list of dos and don'ts.
- The Prescription Medicines Code of Practice Authority³ recently published new social media guidance for pharmaceutical companies that includes working with influencers.

#3

If you want to understand how your company can work with influencers, why not start with an ad board?

- An ad board will allow you to gather insights that you may not already have through bringing expert, creative minds together. It may feel different to your usual ad board, but it's extremely beneficial. These insights will inform how you develop and share content, building your influencer strategy.

#4

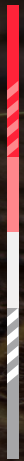
Don't underestimate the power of your internal voice.

- In your influencer strategy, don't forget the importance of employee advocacy. Nobody can tell your internal story better than the people who live it every day. Growing employee profiles externally should be an important part of your strategy.

³The Prescription Medicines Code of Practice Authority (PMCPA) is the self-regulatory body which administers the Association of the British Pharmaceutical Industry (ABPI) Code of Practice for the Pharmaceutical Industry



SOCIAL COMMUNITY



Social community

This review analysed how companies interacted with their followers, including frequency of posting and speed of response.

With the shake-up of the social platform landscape, it is more important than ever for companies to engage with existing communities and build new relevant ones. Community management is an important part of this, as is responding to existing audiences in a relevant and timely manner.



This was the second lowest scoring category overall, with Gilead and Pfizer scoring 0 points as there was no evidence from a public perspective of either company responding to mentions and comments on social posts at the time of our audit. However, Roche was a shining example, scoring 4 out of a possible 5 points.

Response time

On Twitter, the average response time was between 24 and 48 hours, typically taking the form of sharing links or a request to contact with details provided. BMS typically replied saying they would share a direct message. This contrasts with Roche, who replied with a link to a contact form or a local market contact page (therefore giving additional information to anyone else looking at the post).

Roche had the fastest response time, with an average of under 24 hours on Facebook and Instagram. BMS and Novartis took the longest time to respond, with an average reply time of 3 business days.

Your audience expects a quick response, and so replying in a timely manner is important for your company's reputation on social media. Replying within 24 hours should be standard, even if it's a holding response to let people know you have seen their message.



Responses

Likely due to regulatory constraints, companies were very selective when it came to responding to user posts. A polite, professional, and helpful tone was often used. Boehringer Ingelheim excelled at sounding sincere and engaging in their replies, all the while remaining professional.

A polite, professional, and helpful tone was often used.

OGILVY HEALTH'S TIPS SOCIAL COMMUNITY



#1

Nurturing the communities that you already have should be as much a priority as gaining new followers.

- Engaging with your existing community can give you valuable insights to inform your content strategy, including topics you should be communicating and ways to engage.

#2

Replying to comments is the bare minimum.

- Closely monitor your social media channels to identify opportunities to engage with your audience in a meaningful and valuable way. Your responses should always be prompt (within 24 hours).
- Consider managing your responses via a single platform to ensure responses are not missed or using a Chatbot to send initial responses to messages or comments.

#3

Undertake activities that aim to proactively engage your social media community.

- Each of the social platforms offers different ways to engage your audience. Make use of the in-platform capabilities and host live events, audio events, polls, etc. to test alternative ways of engaging your audience to share your messages.



CONCLUSION



Social media is evolving, that much is certain.

With most pharma companies having a well-established corporate social media presence, now is the time to reflect on how to use social more effectively to engage with key communities.

Whilst this doesn't have to be costly, we need to be providing audiences with meaningful and relevant experiences. Being proactive is the name of the game. By doing a few things better, it's possible to make significant incremental gains which will reap dividends in terms of engagement and reputation.

Create genuinely meaningful content that, at its core, is tailor-made for your audience. This can be amplified by collaborating with influencers who already have credible and strong relationships with the people you want to reach.

Now is not the time to sit back, but to blaze new trails to make your company stand out from the pack. Using the learnings from the Social Check-up 2023, we hope you feel inspired to take your company to the next stage.

The graphic features the text 'SOCIAL CHECK-UP' in a bold, white, sans-serif font. Below it, '2023' is written in a white, outlined font, followed by a large, 3D-style gold hashtag symbol. The entire graphic is set against a vibrant red background.

**SOCIAL
CHECK-UP**
2023 #



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