TGaS® Advisors
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TGaS Annual MarTech and AdTech Landscape

An analysis of marketing and advertising technology utilized by patient pharmaceutical brand marketing teams.

August 2023

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TGaS Advisors, a division of Trinity Life Sciences, is pleased to introduce our second annual Digital Marketing Competency Report. The 2022 report provides a ranking of 160+ Rx brands in the pharmaceutical industry based on their omnichannel performance. As the leading provider of benchmarking and advisory services in the life sciences industry, TGaS created this report to provide our network members with an objective assessment of their omnichannel performance and a roadmap for achieving executional excellence.

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Overview and Methodology

Navigating the MarTech Jungle: An In-Depth Analysis of The Technology Powering 160+ Pharma Brands Included in the 2022 TGaS Digital Marketing Competency Report.

In today's hyperconnected digital landscape, the marketing technology (MarTech) space has exploded into a complex ecosystem of over 10,000 potential vendors and services. The sheer volume of available options presents opportunities for pharmaceutical brands to optimize their performance and gain a competitive advantage.

In this whitepaper, TGaS has meticulously reviewed the technology behind 160+ patient websites to understand which tools are leading in their respective categories and identify trends across brands and companies. By analyzing the vast array of platforms and solutions, our study reveals patterns and insights that will shape the future of pharmaceutical marketing. Moreover, our examination highlights emerging innovations to monitor and new offerings that become integrated within the larger cloud ecosystems. Equipped with this knowledge, pharmaceutical companies can inform internal decisions about their current MarTech stack and validate how others operate across the industry.

TGaS conducted research to identify the use of technology through tracking pixels and cookies firing on sites. The study has some minor limitations, as a site could leverage technology but omit its tracking pixel, a smaller advertising company may piggyback off a more widely integrated technology, or there are cases where a lack of tag hygiene leads to us counting technology that is no longer utilized. However, TGaS is highly confident in the findings and analysis regarding how the industry uses MarTech to drive enhanced customer engagement for the near future.

To standardize the classification of the vast array of technologies, TGaS utilized the website www.martechmap.com as a guide to organizing the technology identified in our research into categories. Given that media partners often offer multiple capabilities, we were able to rely on credible resources within the MarTech landscape and utilize our expertise to refine categories where appropriate further.

TGaS' assessment provides accurate insight and analysis that will assist companies in developing and maintaining their MarTech roadmap.

Top MarTech and AdTech Utilized Across the Industry

Marketing/Advertising Technology	Brand Utilization (N=162)
Google Universal Analytics	82%
DoubleClick Floodlight	76%
Facebook Pixel	75%
Google Tag Manager	73%
GA4	66%
The Trade Desk	49%
LiveRamp	48%
Microsoft Advertising Universal Event Tracking	44%
Google Ads Audience Tracker	39%
Google Web Font	38%
AppNexus (Xandr - Microsoft)	37%
Adobe Audience Manager	32%
OneTrust	31%
Adobe Advertising Cloud	27%
Facebook Social Plugins	27%
Adobe Analytics	25%
Adobe Cloud ID Service	25%
Adobe Typekit	23%
Adobe Launch	23%

Website Analytics

G4 Migration in 2023 and Rise of Adobe Analytics

In the past, a few options and web analytics tools often required little deliberation; however, there has been a noticeable shift in the landscape. With the transition from Google Analytics' Universal Analytics (UA) to GA4 and the rise in Adobe Analytics, pharmaceutical companies are

For more information and to get the full report , please contact us at info@trinitylifesciences.com

Advertising Technology (AdTech)

Adobe AdTech and pharma-specific programmatic vendors growing market share.

Google and Microsoft, unsurprisingly, account for four of the top ten most utilized advertising technologies, recognized for their robust paid search and display capabilities. Adobe's role in the AdTech stack across the pharmaceutical industry is strengthening, following the trend

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Top Advertising Tech Utilized by Percent of Market Share

Advertising Technology	Type of AdTech	Brands Utilizing (N=162)
The Trade Desk	Display & Programmatic	[illegible]
LiveRamp	Audience/Marketing Data & Data Enhancement	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]
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Customer Data Platforms (CDPs)

Growing Utilization in 2022

Customer Data Platforms (CDPs) have become increasingly utilized in achieving omnichannel excellence, providing brands and companies with the means to consolidate and use customer data from various touchpoints and natively integrate with hundreds of different MarTech.

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Marketing Automation

Limited Utilization on Patient Websites

A common question among marketers in the pharmaceutical industry is how marketing automation and Customer Data Platforms (CDPs) differ. While marketing automation

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Consent Management and Cookie Compliance

OneTrust Far Exceeds Competition in Market Share

Consent management and cookie compliance tools ensure organizations adhere to evolving global privacy regulations regarding their respective websites and personal data usage.

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Digital Experience Analytics

Hotjar Leads the Pack

Brands utilize digital experience analytics tools to gain valuable insights into how users interact with their websites. Tracking and visualizing user actions such as clicks, scrolls, and mouse

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Video Hosting and Streaming Platforms

Vimeo and Brightcove Emerge as Leaders in the Industry

Video hosting and streaming players embedded on websites are frequently overlooked components of a brand's online presence, yet they are crucial in delivering rich educational

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Trends to Watch

Tag Monitoring

With the advent of technologies such as OneTrust, businesses are increasing their efforts to meet local consent management and cookie compliance regulations across the United States.

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For more information on the study or to discuss MarTech in more detail, you can contact a member of the TGaS Omnichannel Solution below:

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About Trinity

Trinity is a trusted strategic commercialization partner, providing evidence-based solutions for the life sciences. With over 25 years of experience, Trinity is revolutionizing the commercial model by providing exceptional levels of service, powerful tools and data-driven insights. Trinity's range of products and solutions includes industry-leading benchmarking solutions, powered by TGaS Advisors. To learn more about how Trinity is elevating life sciences and driving evidence to action, visit trinitylifesciences.com.

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