BCG

How Biopharma and Medtech Leaders Can Get Omnichannel Right

JUNE 2025

Executive summary

Context

BCG conducted a study with biopharma and medtech leaders[1]

We engaged with 100+ senior leaders across commercial, omnichannel, IT and digital, and data and analytics roles via a survey and interviews.

1

Omnichannel is increasingly essential in biopharma and medtech

- 97% of respondents agree that omnichannel is critical, but 30% lack a clear strategy.
- Companies are investing significantly in omnichannel (10%–15% of their advertising and promotion budget).
- The longer companies commit to omnichannel, the more dollars they invest, signaling sustained interest.

2

Most companies are struggling to execute

- 95% of respondents cite low connectivity across teams as a top barrier to omnichannel success.
- Nearly 60% are dissatisfied with NBEx engines, and adherence is suboptimal.
- Only 7% of respondents are broadly leveraging AI/GenAI for omnichannel.

3

With the right strategy, omnichannel can deliver more than 15% revenue uplift in biopharma and medtech

- Clear roadmaps, targeted talent, and stronger execution are required to capture value from AI and GenAI.
- Governance and incentive structures are needed to optimize NBEx adherence.
- Change management and co-creation with stakeholders is key to ensure successful cross-functional collaboration.

What is omnichannel?

Orchestrate team efforts around next-best experiences (**NBEx**)
· Sales reps, ISRs (inside sales reps)
· Marketing teams
· Medical science liaisons
· Clinical and category specialists
· Field reimbursement managers

Personalize messages at the right time and frequency
· Customized materials for online and in-person interactions are cohesive
· Engagement frequency is tailored to the responsiveness of health care providers for each brand

Create a cohesive experience across online and offline channels
· Face-to-face interactions
· Email
· Search platforms
· Social media
· Print
· Conferences

Source: BCG analysis.

Omnichannel can create significant value for biopharma and medtech, but most companies are not getting it right

97%
surveyed believe omnichannel is critical for success

>$50M
per year spent on omnichannel solutions[1] by 25% of companies

Up to
15%
revenue lift achieved by top companies

95%
of companies not able to clearly measure omnichannel ROI

~60%
of companies that measure ROI have less than 5% revenue uplift

Pharma and medtech companies face five key challenges implementing omnichannel

Pain points

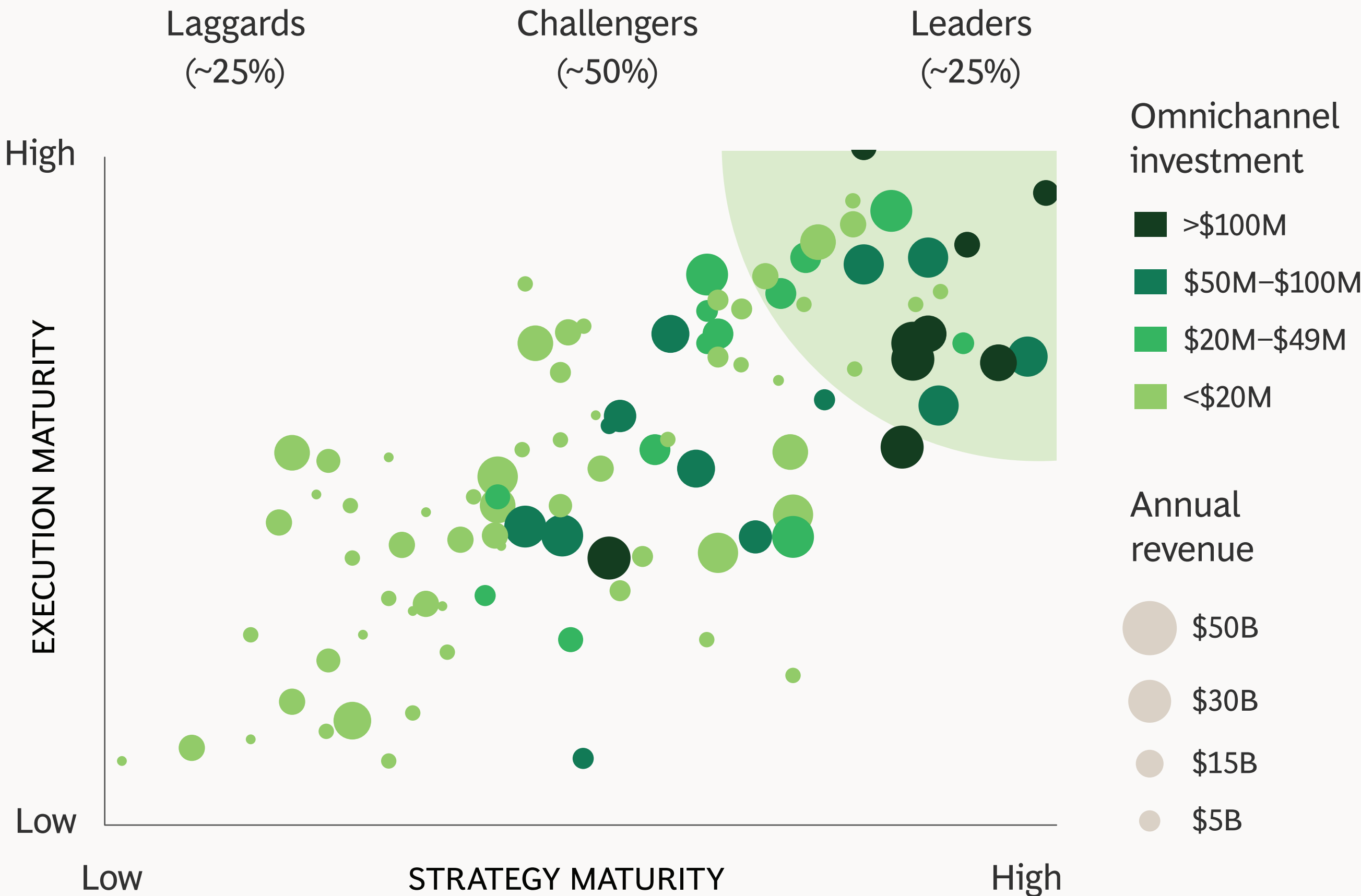|	
Strategy	**30%** do not have a clear strategy in place
KPI & ROI measurement	**52%** do not holistically measure leading and lagging indicators
Omnichannel engine (NBEx)	**60%** are not satisfied with their NBEx engine
Data and technology integration	**90%** face challenges with data silos and data connectivity across teams
Execution and change management	**90%** follow NBEx recommendations less than 60% of the time

Our maturity assessment of biopharma and medtech companies enables benchmarking of omnichannel capabilities

We asked medtech and biopharma company leaders about omnichannel across several quantifiable metrics:

· Strategy
· Data quality and integration
· Omnichannel platform
· KPI and ROI tracking
· Talent and skill sets
· Execution and change management

We then created a **maturity assessment**, ranking organizations' omnichannel sophistication.

Laggards (~25%)   Challengers (~50%)   Leaders (~25%)

EXECUTION MATURITY — Low / High

STRATEGY MATURITY — Low / High

Omnichannel investment
■ >$100M
■ $50M–$100M
■ $20M–$49M
■ <$20M

Annual revenue
$50B
$30B
$15B
$5B

Three major themes in biopharma and medtech across omnichannel

The ambition and strategy of omnichannel

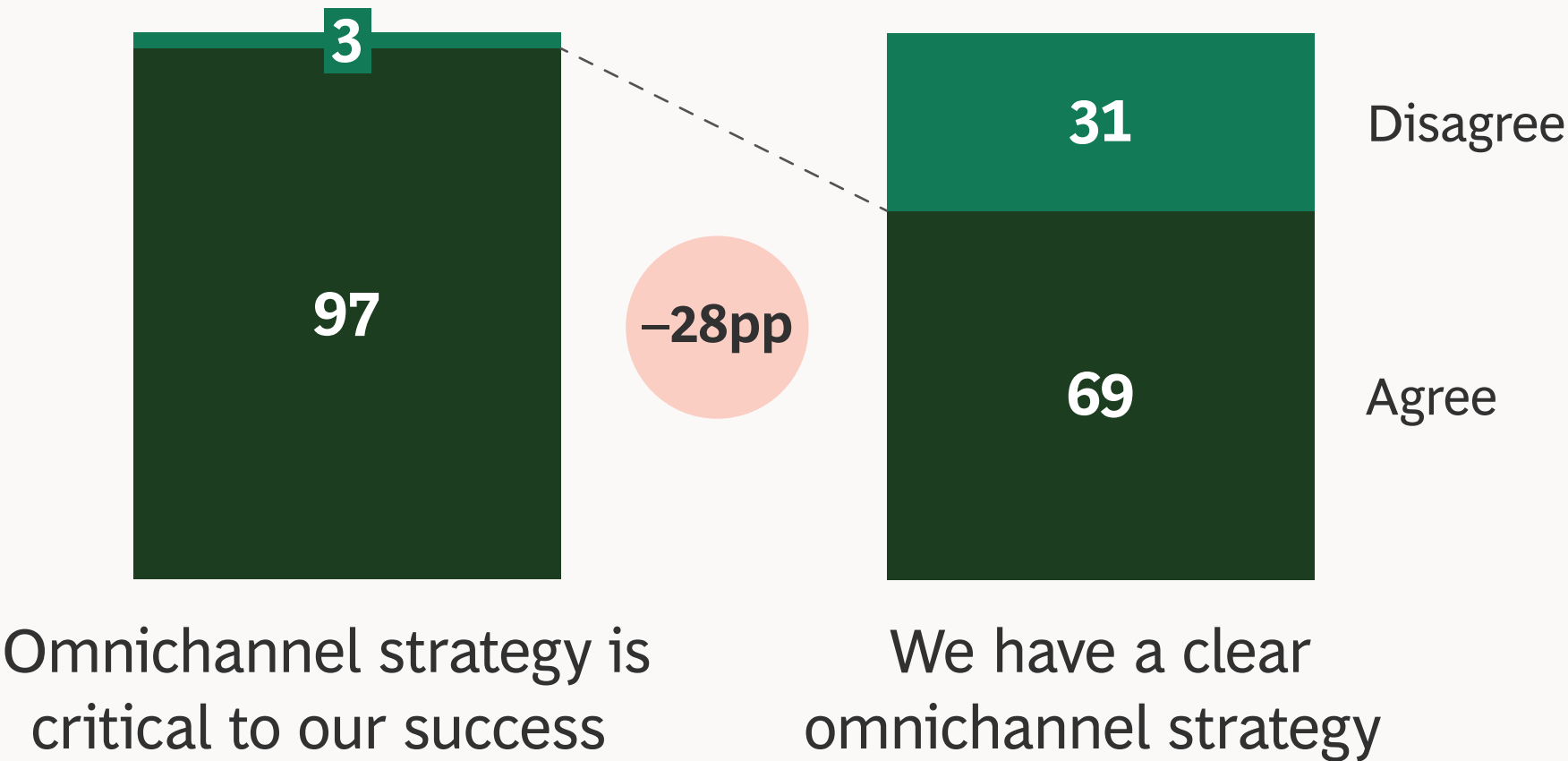Why biopharma and medtech companies struggle to execute

Unlocking the value of omnichannel for biopharma and medtech

97% of biopharma and medtech leaders agree that omnichannel is critical, but many lack a clear strategy

Omnichannel is considered critical for success, but ~30% of companies struggle with strategy, especially smaller organizations
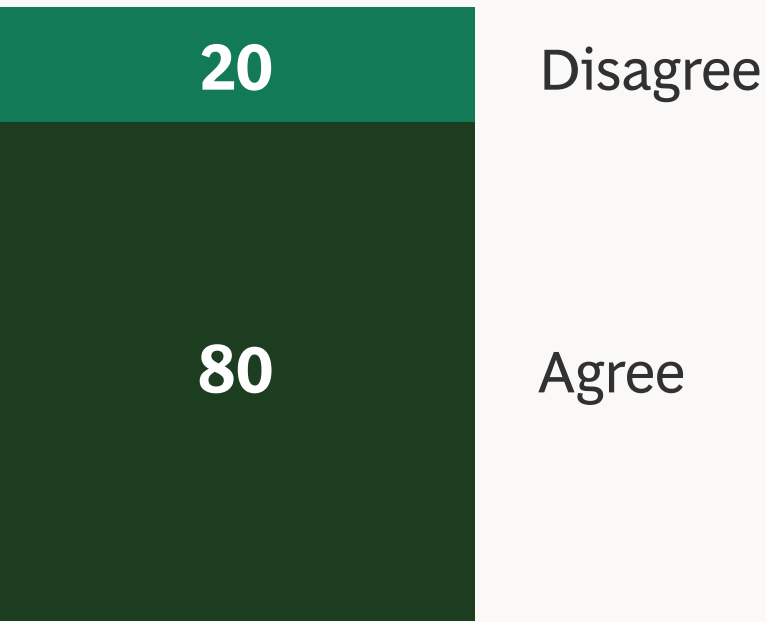
% OF RESPONDENTS

3

97

Omnichannel strategy is critical to our success

−28pp

31 — Disagree

69 — Agree

We have a clear omnichannel strategy

92% of smaller companies[1] also believe omnichannel is critical, but **only 54% have a clear strategy.**

Most leaders support investments in omnichannel innovations

% OF RESPONDENTS

20 — Disagree

80 — Agree

Leadership has appetite to invest and implement new omnichannel innovations

" To be successful, it is highly important to have strong leadership buy-in and a strategic vision.
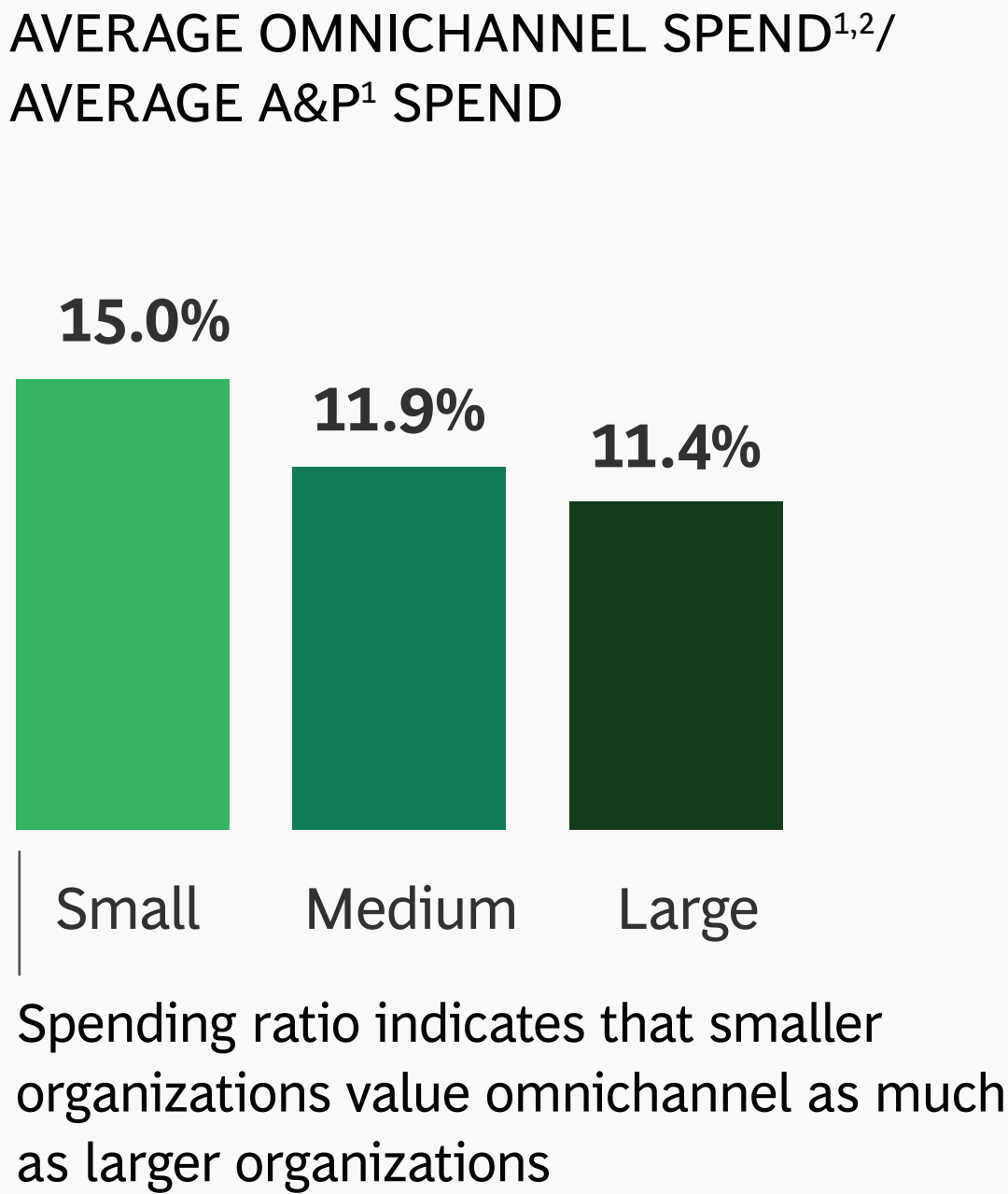
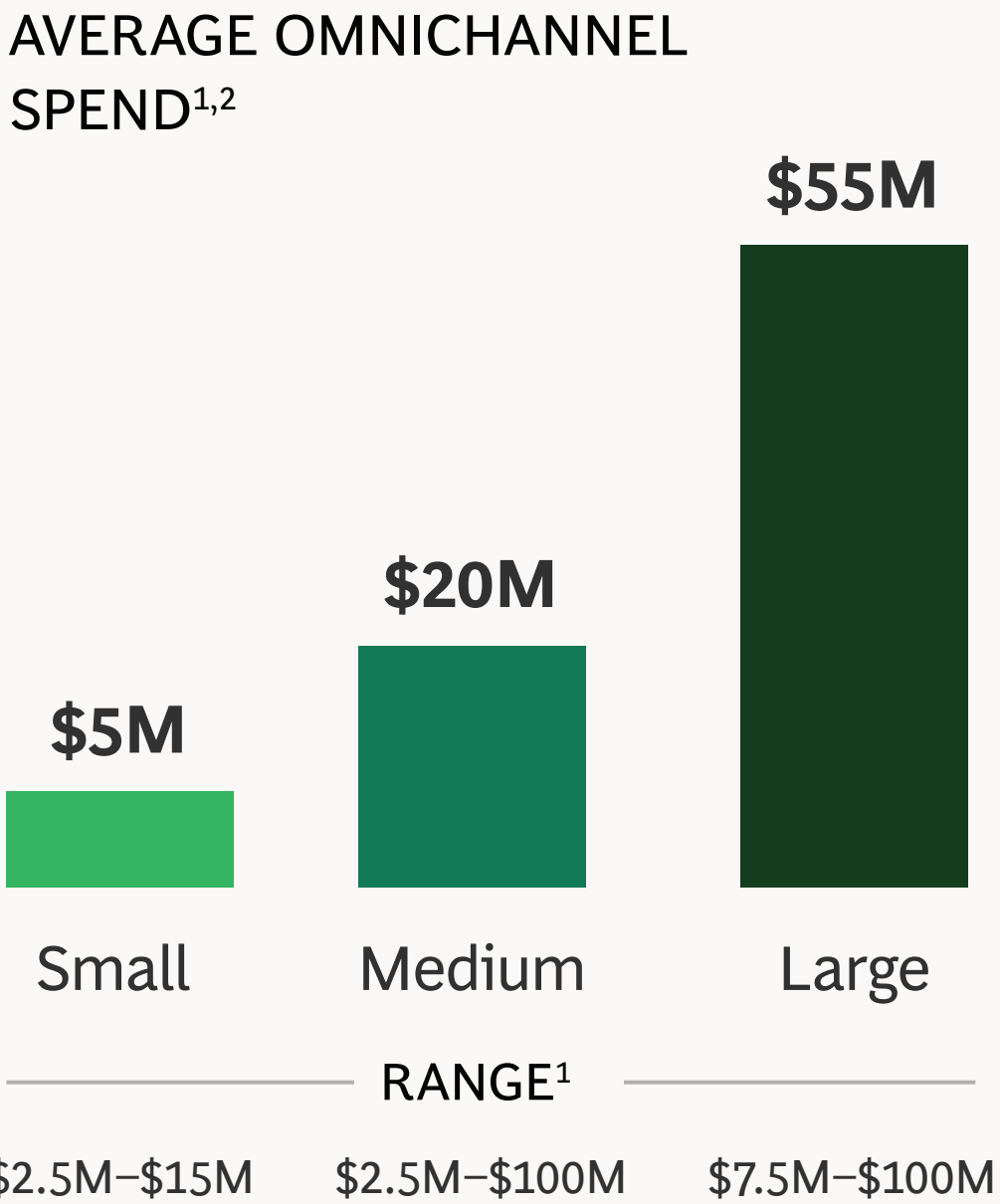**SVP, customer experience (biopharma)**

Source: BCG 2025 omnichannel survey.
Note: Q11—Please indicate your perspective on your company's omnichannel strategy and execution.
[1]Small companies are defined as companies with annual revenue of <$1 billion.
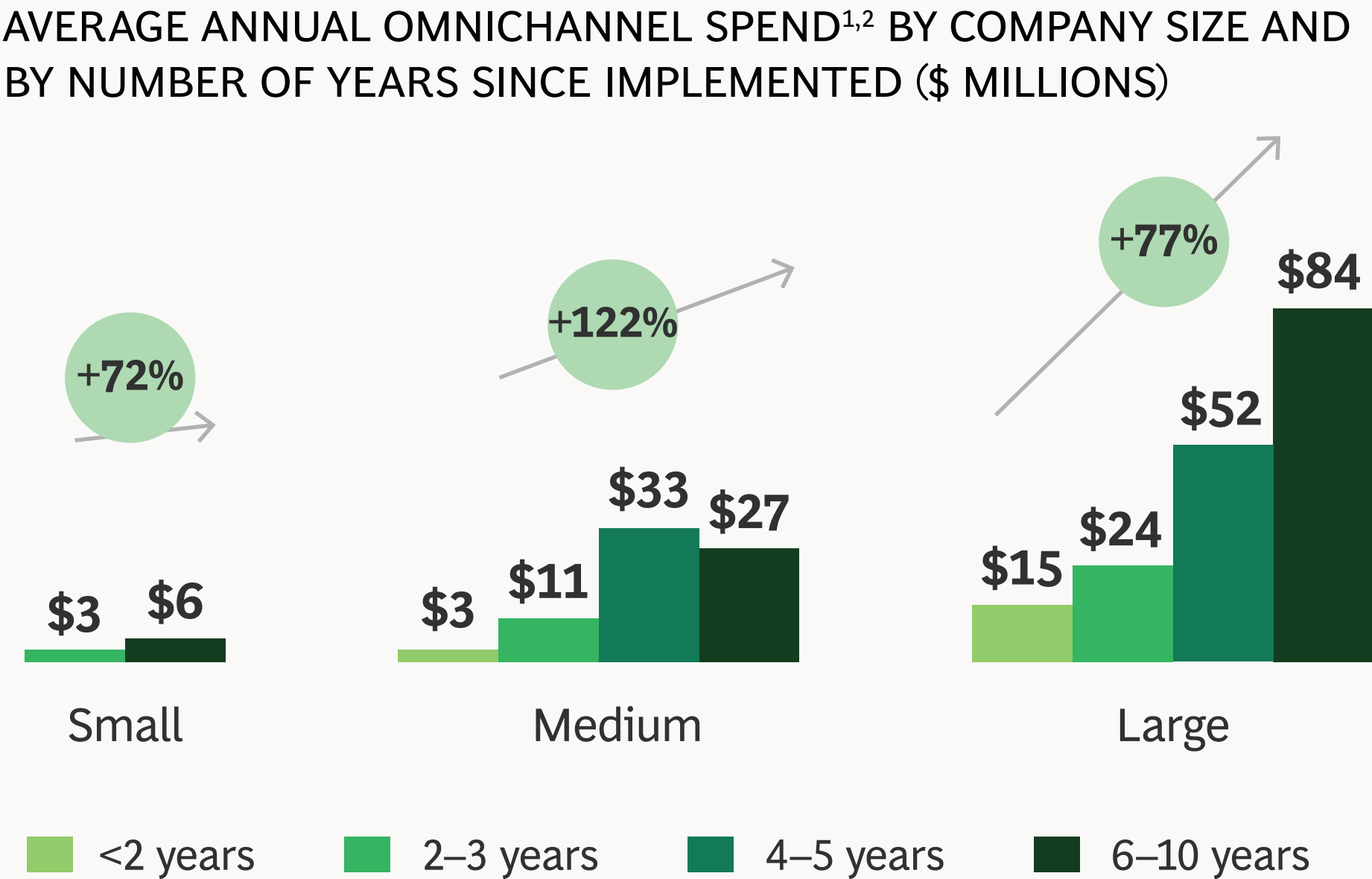
Biopharma and medtech companies of all sizes are stepping up investments in omnichannel

Large organizations spend more on omnichannel in absolute numbers, but smaller organizations spend more proportionally

AVERAGE OMNICHANNEL SPEND[1,2]

$5M — Small
$20M — Medium
$55M — Large

RANGE[1]

$2.5M–$15M
$2.5M–$100M
$7.5M–$100M

AVERAGE OMNICHANNEL SPEND[1,2]/ AVERAGE A&P[1] SPEND

15.0% — Small
11.9% — Medium
11.4% — Large

Spending ratio indicates that smaller organizations value omnichannel as much as larger organizations

The longer companies have implemented omnichannel, the more dollars they invest, signaling sustained interest

AVERAGE ANNUAL OMNICHANNEL SPEND[1,2] BY COMPANY SIZE AND BY NUMBER OF YEARS SINCE IMPLEMENTED ($ MILLIONS)

Small: $3, $6 (+72%)
Medium: $3, $11, $33, $27 (+122%)
Large: $15, $24, $52, $84 (+77%)

Legend:
- <2 years
- 2–3 years
- 4–5 years
- 6–10 years

For many biopharma and medtech companies, data and tech capabilities are holding back omnichannel evolution

65% have the right data and technology capabilities to support basic omnichannel needs . . .

LEADERS' PERSPECTIVES ON OMNICHANNEL CAPABILITIES AND PROCESSES (% OF RESPONDENTS)

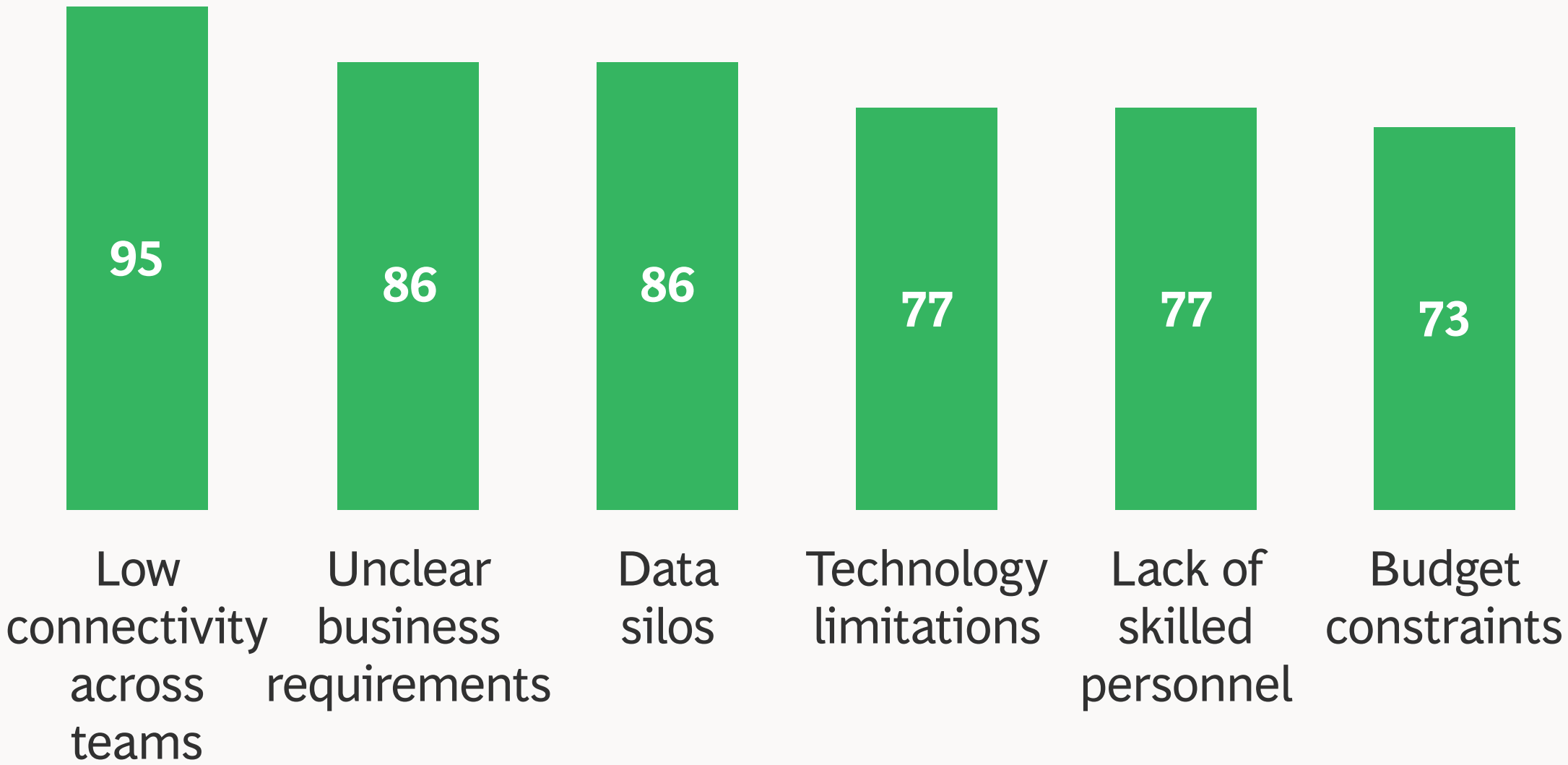|	Data source integration	Leveraging data for personalized engagement	Single, unified view of customer	Data governance model
Disagree	40	42	55	60
Agree	60	58	45	40

■ Agree ■ Disagree
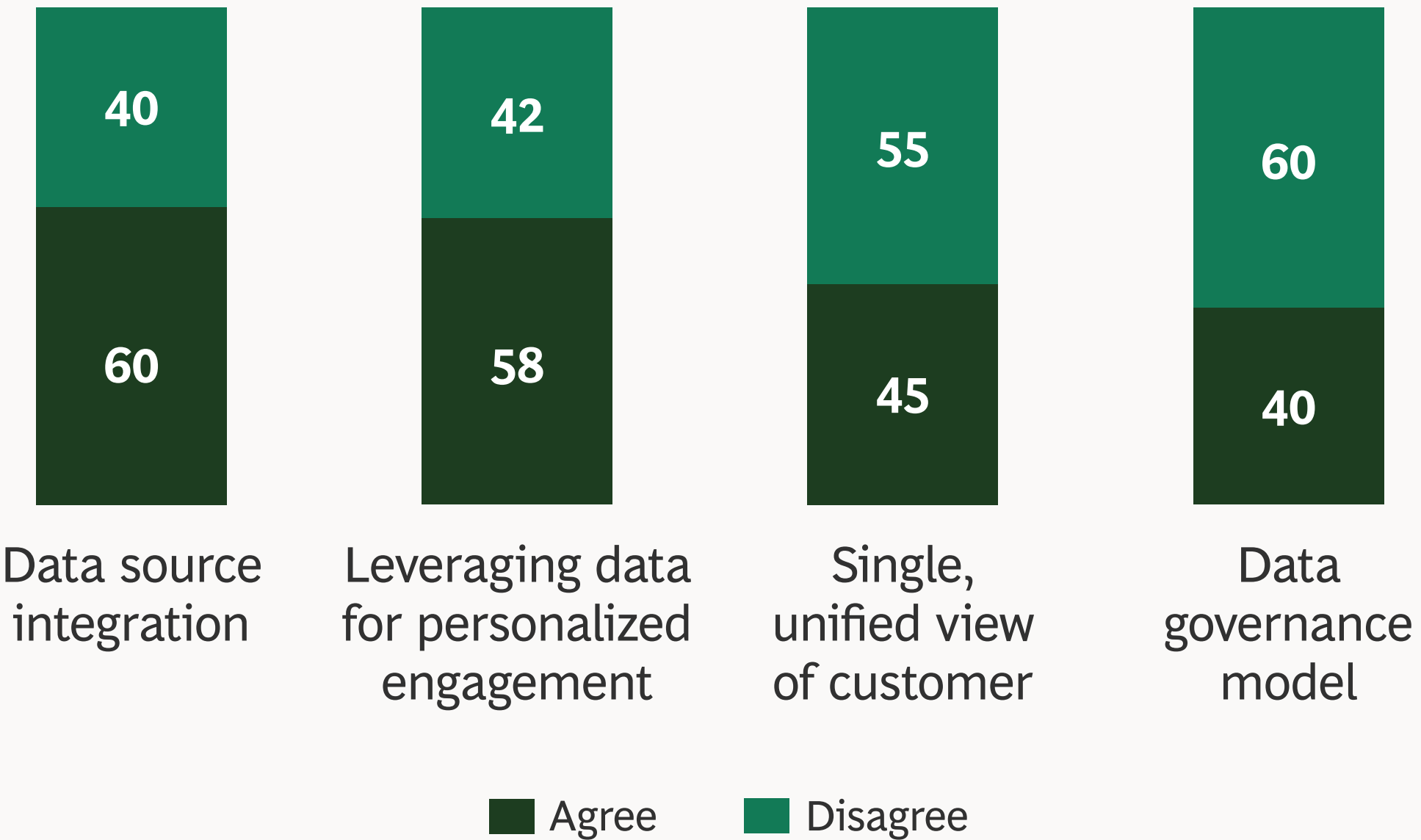
. . . but only 47% agree they could support evolved omnichannel needs, such as AI & automation

TOP 5 BARRIERS FOR OMNICHANNEL DATA AND TECHNOLOGY SUCCESS (% OF RESPONDENTS)

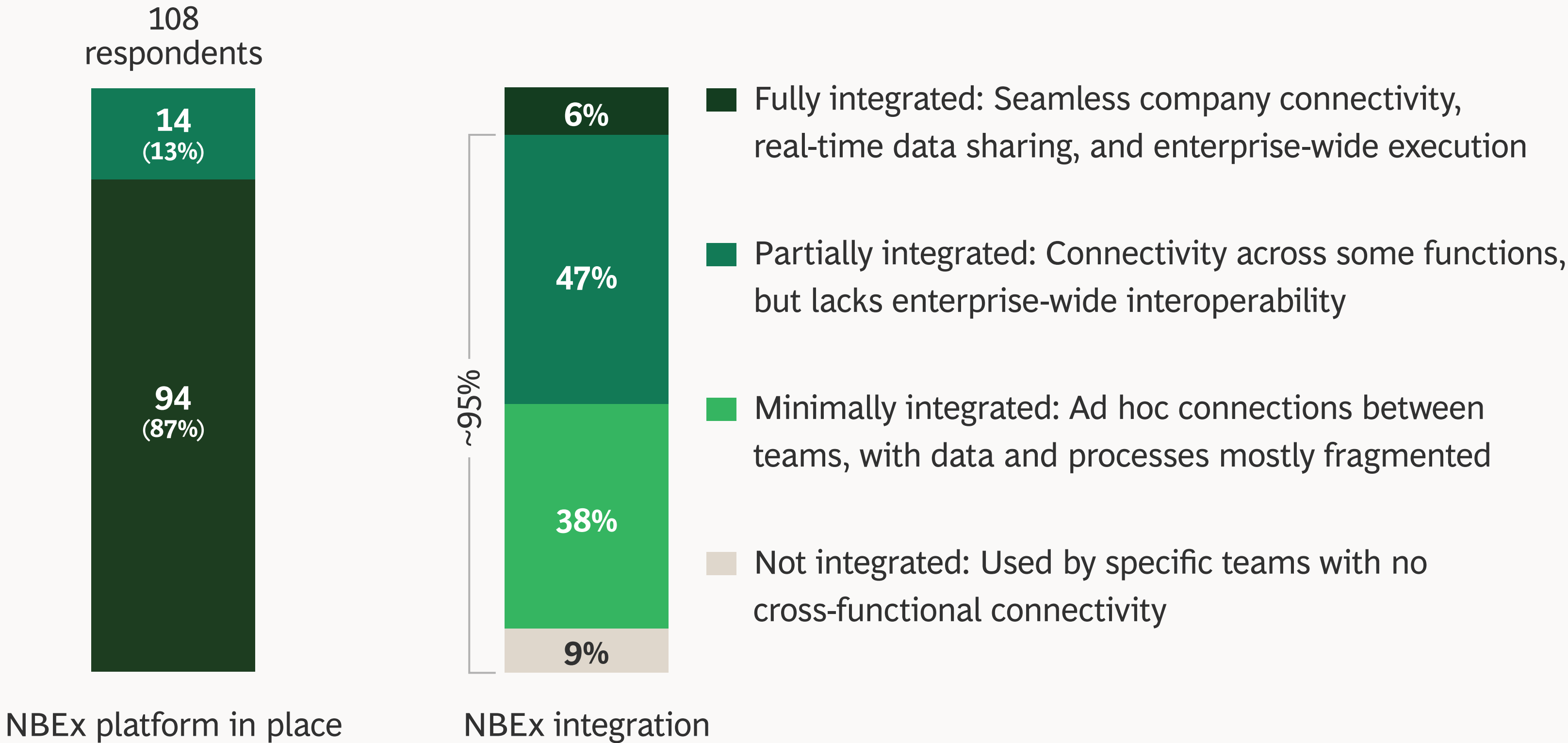| Low connectivity across teams	Unclear business requirements	Data silos	Technology limitations	Lack of skilled personnel	Budget constraints
95	86	86	77	77	73

NBEx platforms are widely used, but not fully integrated

~90% of respondents have an NBEx platform

But only 6% have a fully integrated NBEx platform

108 respondents

Bar segment	
14 (13%)	
94 (87%)	

NBEx platform in place

~95%

NBEx integration	
6%	
47%	
38%	
9%	

Fully integrated: Seamless company connectivity, real-time data sharing, and enterprise-wide execution

Partially integrated: Connectivity across some functions, but lacks enterprise-wide interoperability

Minimally integrated: Ad hoc connections between teams, with data and processes mostly fragmented

Not integrated: Used by specific teams with no cross-functional connectivity

" Overall, [the omnichannel tool] was good . . . however, we internally faced issues with technology and data integration.
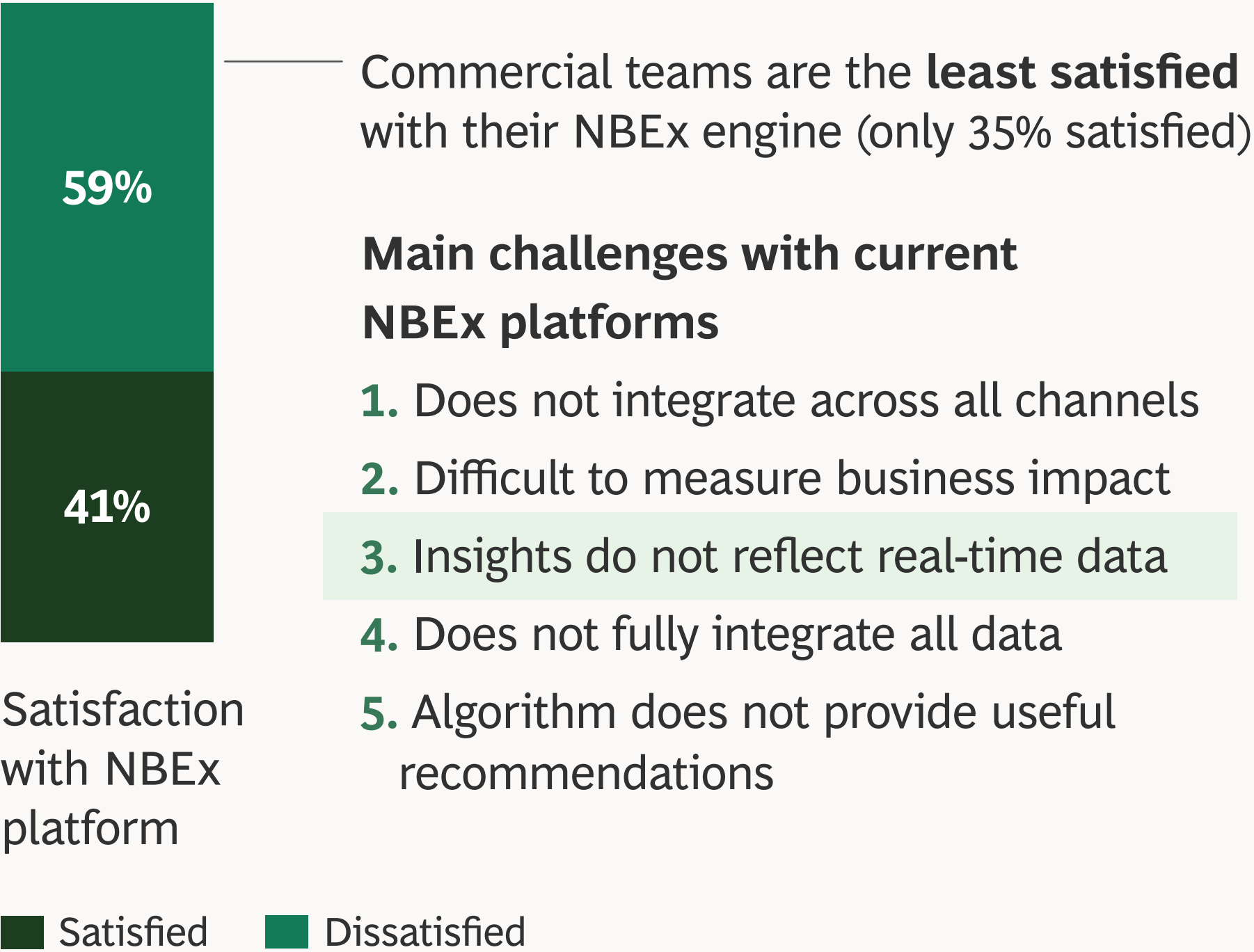
Head of digital (biopharma)

Most companies are dissatisfied with their NBEx engines, especially off-the-shelf models

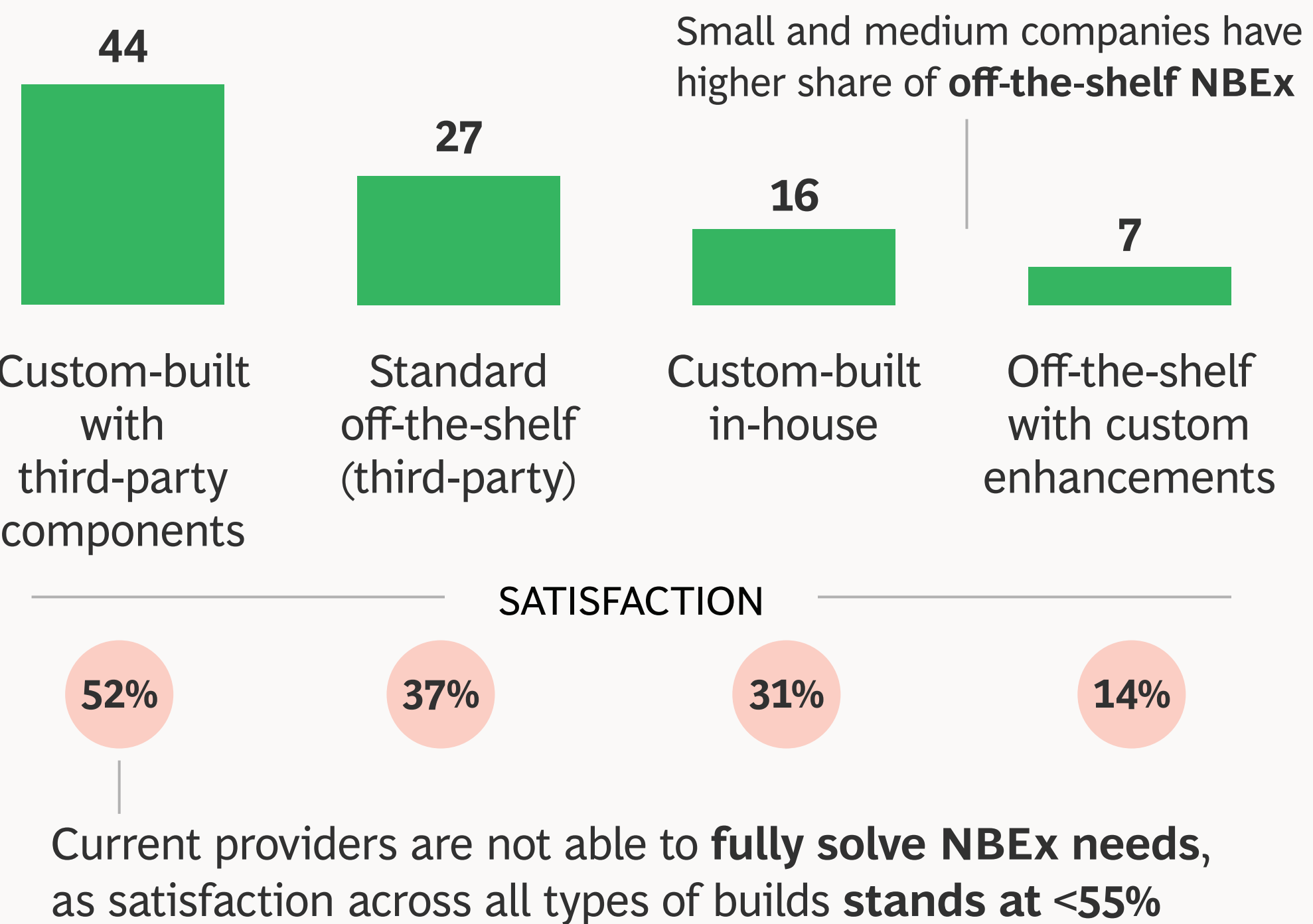## ~60% are not satisfied with their NBEx, especially sales teams

94 RESPONDENTS

59%

41%

Satisfaction with NBEx platform

■ Satisfied ■ Dissatisfied

Commercial teams are the **least satisfied** with their NBEx engine (only 35% satisfied)

Main challenges with current NBEx platforms

1. Does not integrate across all channels
2. Difficult to measure business impact
3. Insights do not reflect real-time data
4. Does not fully integrate all data
5. Algorithm does not provide useful recommendations

Clients prefer customized solutions, although there's still room for improvement

TYPE OF NBEx BUILD (% OF RESPONDENTS)

Small and medium companies have higher share of **off-the-shelf NBEx**

44	27	16	7
Custom-built with third-party components	Standard off-the-shelf (third-party)	Custom-built in-house	Off-the-shelf with custom enhancements

SATISFACTION

| **52%** | **37%** | **31%** | **14%** |

Current providers are not able to **fully solve NBEx needs**, as satisfaction across all types of builds **stands at <55%**

Adherence to NBEx is low, with minimal incentives to follow recommendations

~90% of respondents follow the recommendations less than 60% of the time

ON AVERAGE, HOW FREQUENTLY DOES YOUR TEAM FOLLOW THE NBEx RECOMMENDATION? (% OF RESPONDENTS)

90% OF RESPONDENTS

<20	20–39	40–59	60–79	>80
24	37	27	12	0
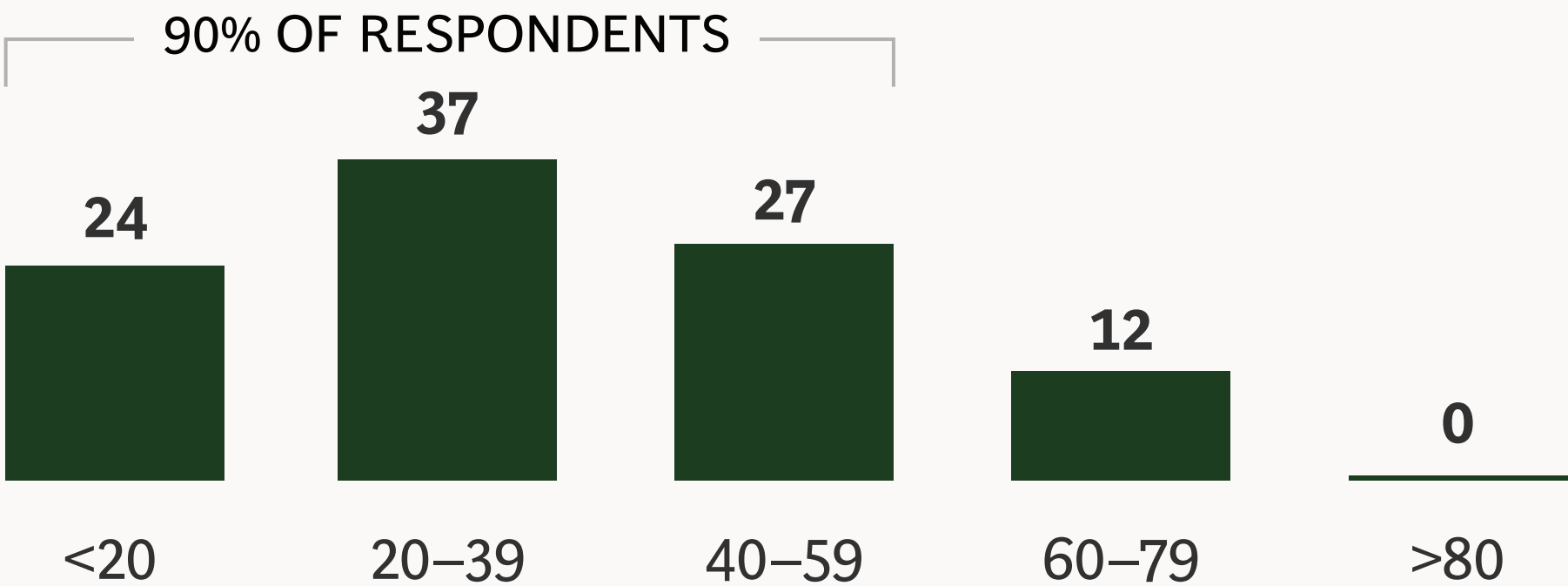
> " To win reps you need to show them how this tool will help them achieve their targets.
>
> **Head of sales (biopharma)**

Half of respondents have discretionary use of NBEx recommendations

ARE THERE INCENTIVES FOR FIELD TEAMS TO FOLLOW NBEx RECOMMENDATIONS? (% OF RESPONDENTS)

52	27	10	11

- No incentives and no tracking: Following recommendations is discretionary
- Tracking: Adherence is tracked but not tied to incentives
- Recognition: Adherence is encouraged through non-monetary incentives, such as leaderboards
- Incentive: Adherence is linked to compensation
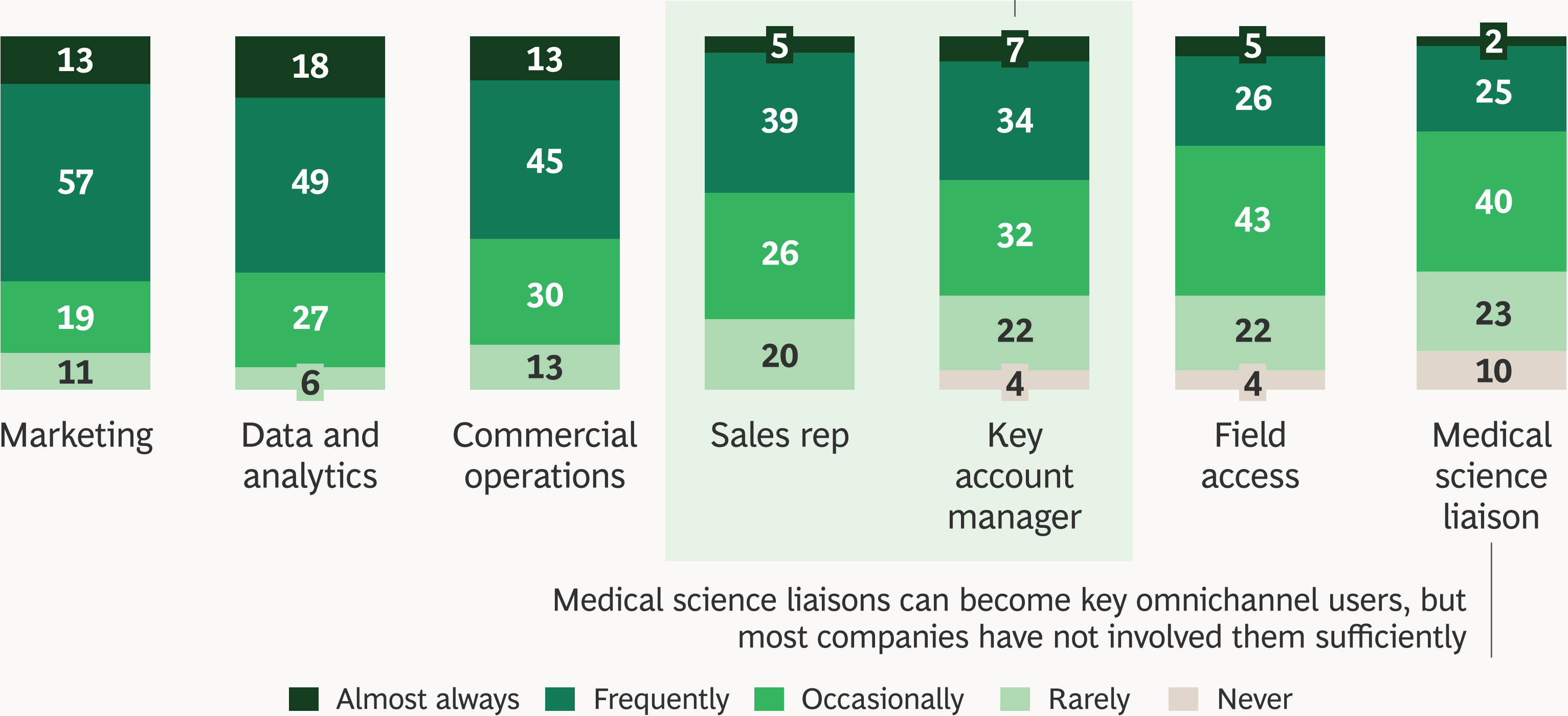
Source: BCG 2025 omnichannel survey.
Note: NBEx = next-best experience. Q44—On average, how frequently does your team follow the NBEx recommendations from your omnichannel tool? Q45—What type of incentives does your organization have in place for field teams to follow NBEx recommendations?

Frequent omnichannel usage varies across teams, with gaps in cross-functional collaboration

To what extent do the following teams actively use omnichannel tools?

(% OF RESPONDENTS)

Sales reps and key account managers are not fully committed to omnichannel. They should be involved in strategy and platform design so it's aligned to their needs.

	Marketing	Data and analytics	Commercial operations	Sales rep	Key account manager	Field access	Medical science liaison
Almost always	13	18	13	5	7	5	2
Frequently	57	49	45	39	34	26	25
Occasionally	19	27	30	26	32	43	40
Rarely	11	6	13	20	22	22	23
Never					4	4	10

Medical science liaisons can become key omnichannel users, but most companies have not involved them sufficiently

Legend: Almost always · Frequently · Occasionally · Rarely · Never

> " In reality, we are not doing full omnichannel, as we have silos within teams.
>
> **Head of data management (biopharma)**

> " There was a better omnichannel in my former company as they had a higher degree of collaboration across teams.
>
> **Head of data management (biopharma)**

Source: BCG 2025 omnichannel survey.
Note: Q54—To what extent do the following teams actively use omnichannel tools?
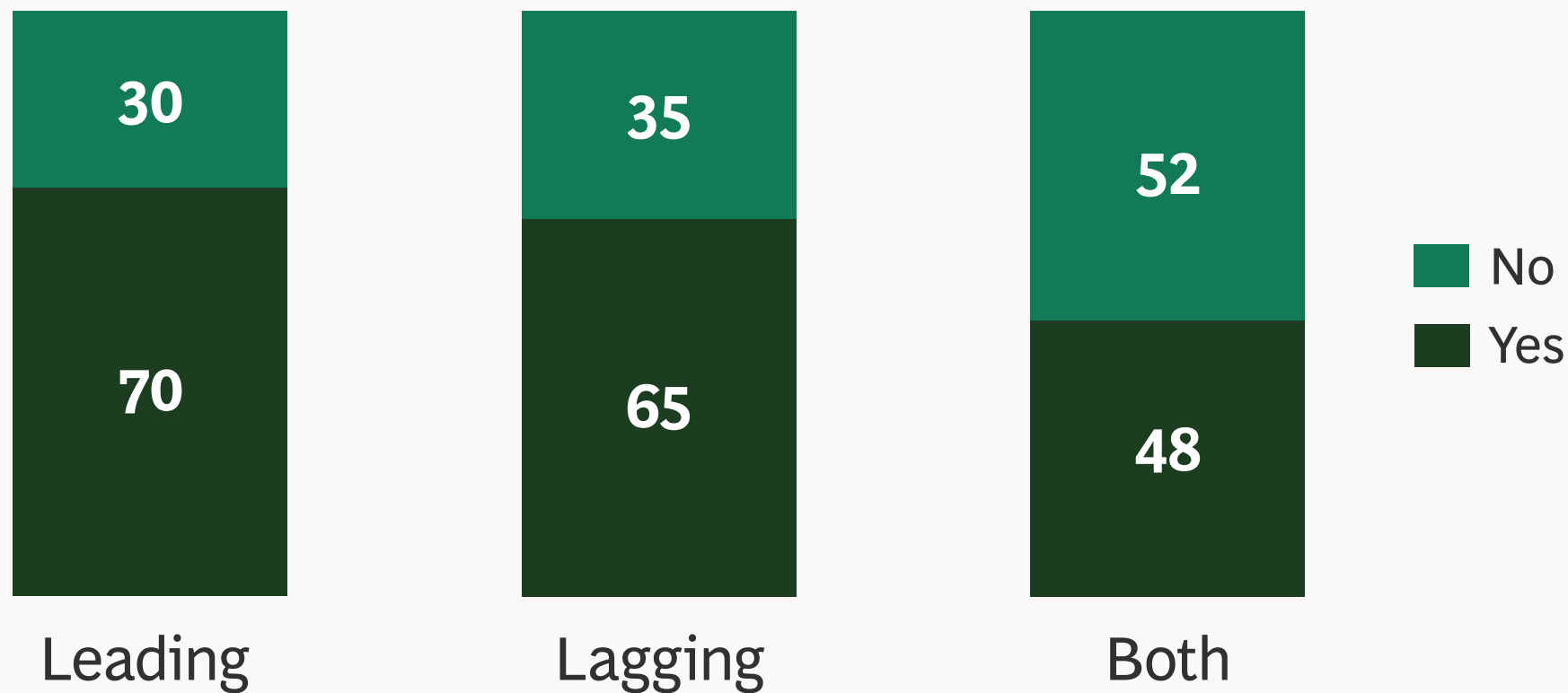
Many companies are not tracking the right indicators or KPIs to measure omnichannel effectiveness

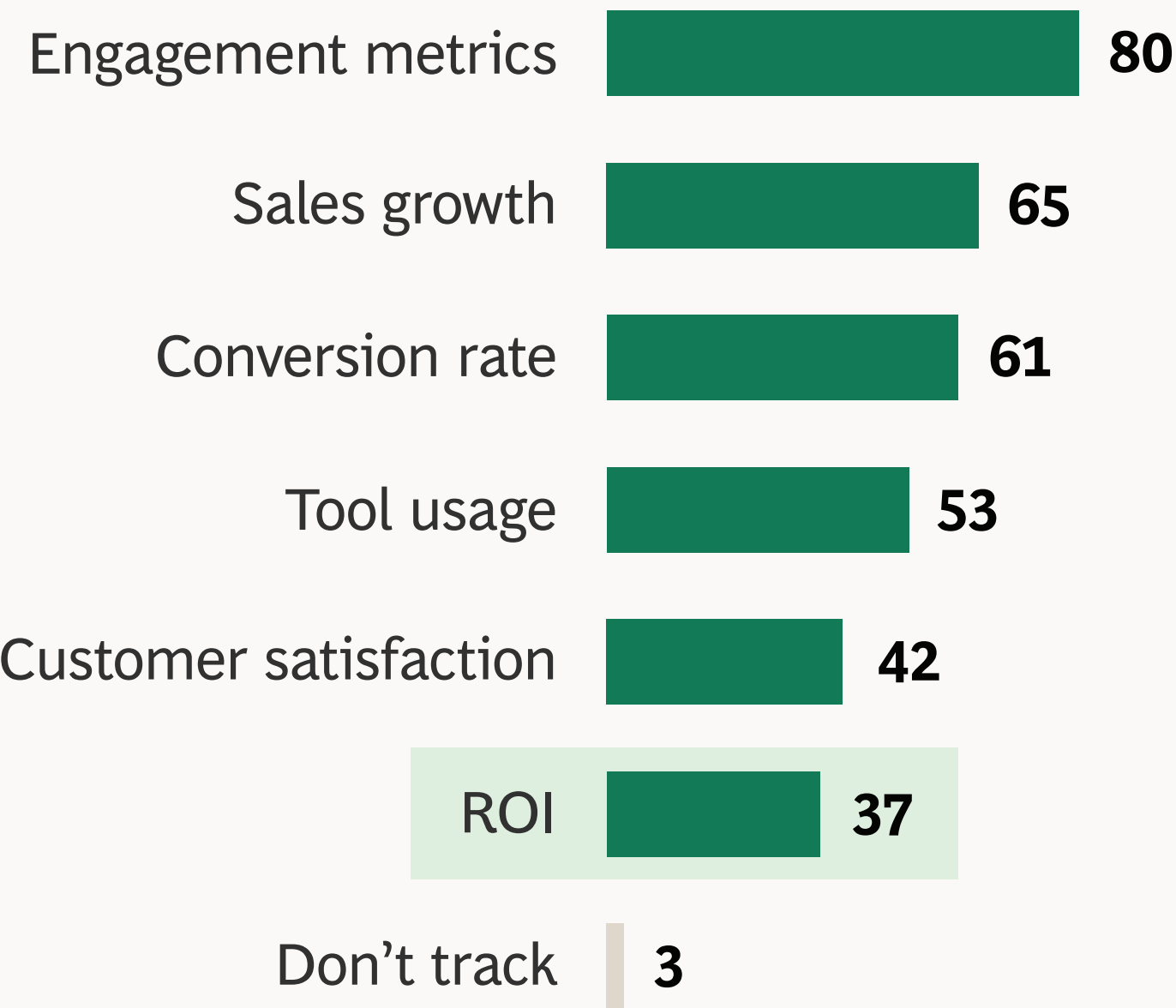## Most respondents say their company is not tracking both leading and lagging indicators

TRACKING OF INDICATORS (% OF RESPONDENTS)

	Leading	Lagging	Both
No	30	35	52
Yes	70	65	48

- No
- Yes

Organizations lack a holistic measurement approach to measure both leading and lagging indicators, especially among smaller and medium companies

ROI is the least measured KPI for omnichannel effectiveness

KPIS USED TO MEASURE OMNICHANNEL EFFECTIVENESS (% OF RESPONDENTS)

KPI	%
Engagement metrics	80
Sales growth	65
Conversion rate	61
Tool usage	53
Customer satisfaction	42
ROI	37
Don't track	3

Top companies can achieve >15% revenue uplift from omnichannel, but too few track and measure its value

**Respondents agree omnichannel is generating ROI, but they struggle to track and measure value**

(% OF RESPONDENTS)

	Disagree	Agree
Omnichannel generates significant ROI	35	65
We can track and measure value	45	55
We can clearly track and measure value	95	5

- Disagree
- Agree
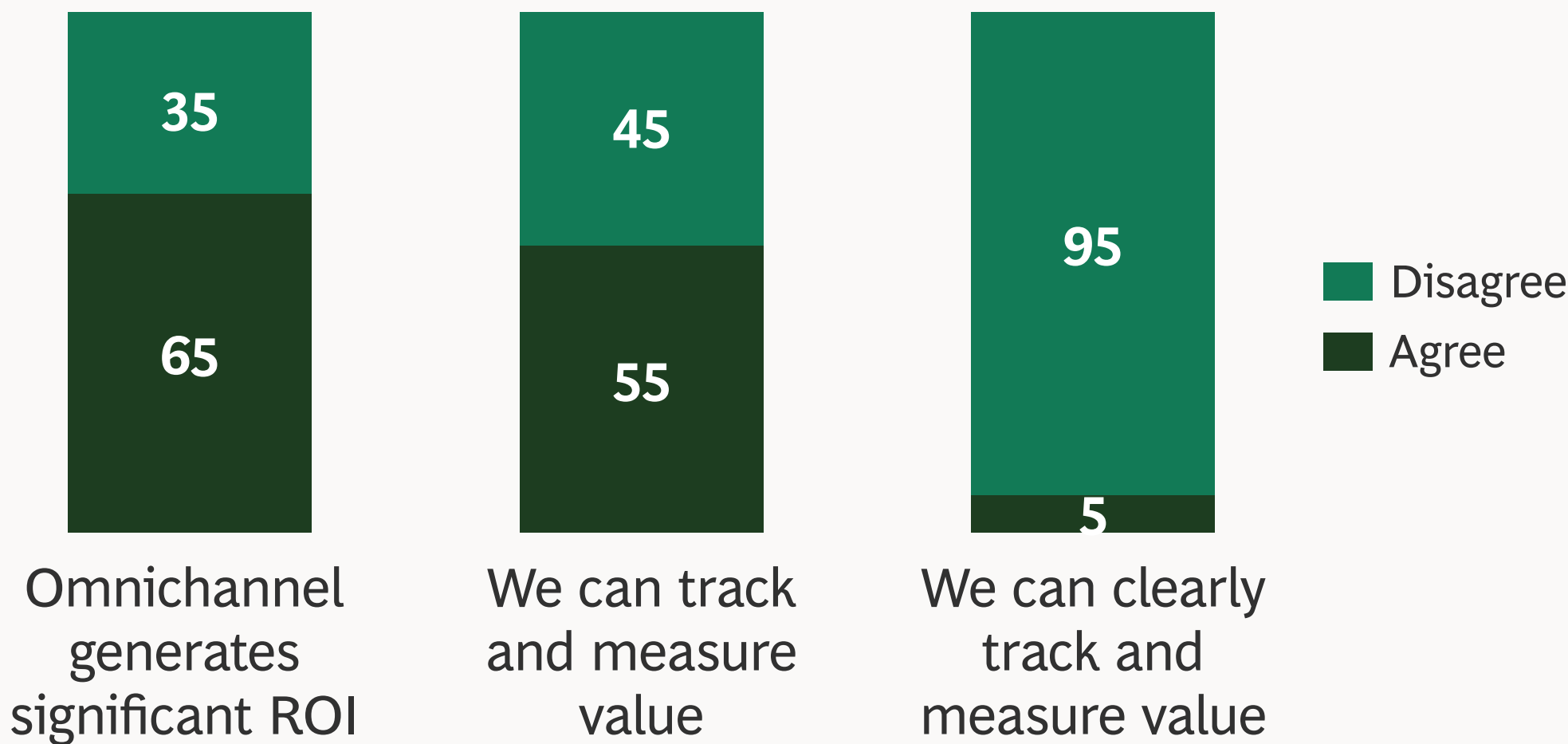
Nearly 30% of companies have no clarity on the impact of omnichannel

Companies that track value can see attractive results; 40% saw revenue lifts of 5% to >15%

(% OF RESPONDENTS)
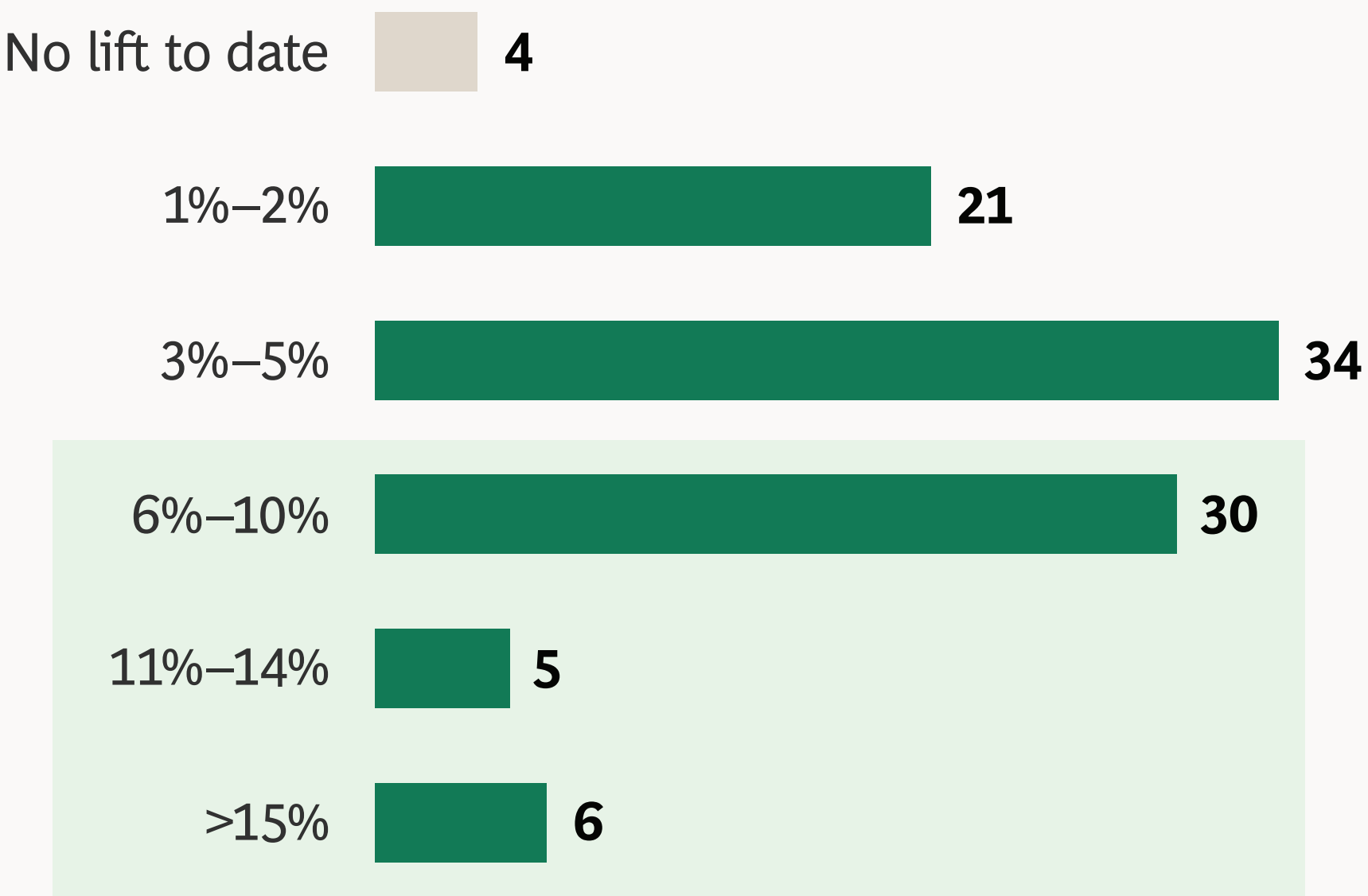
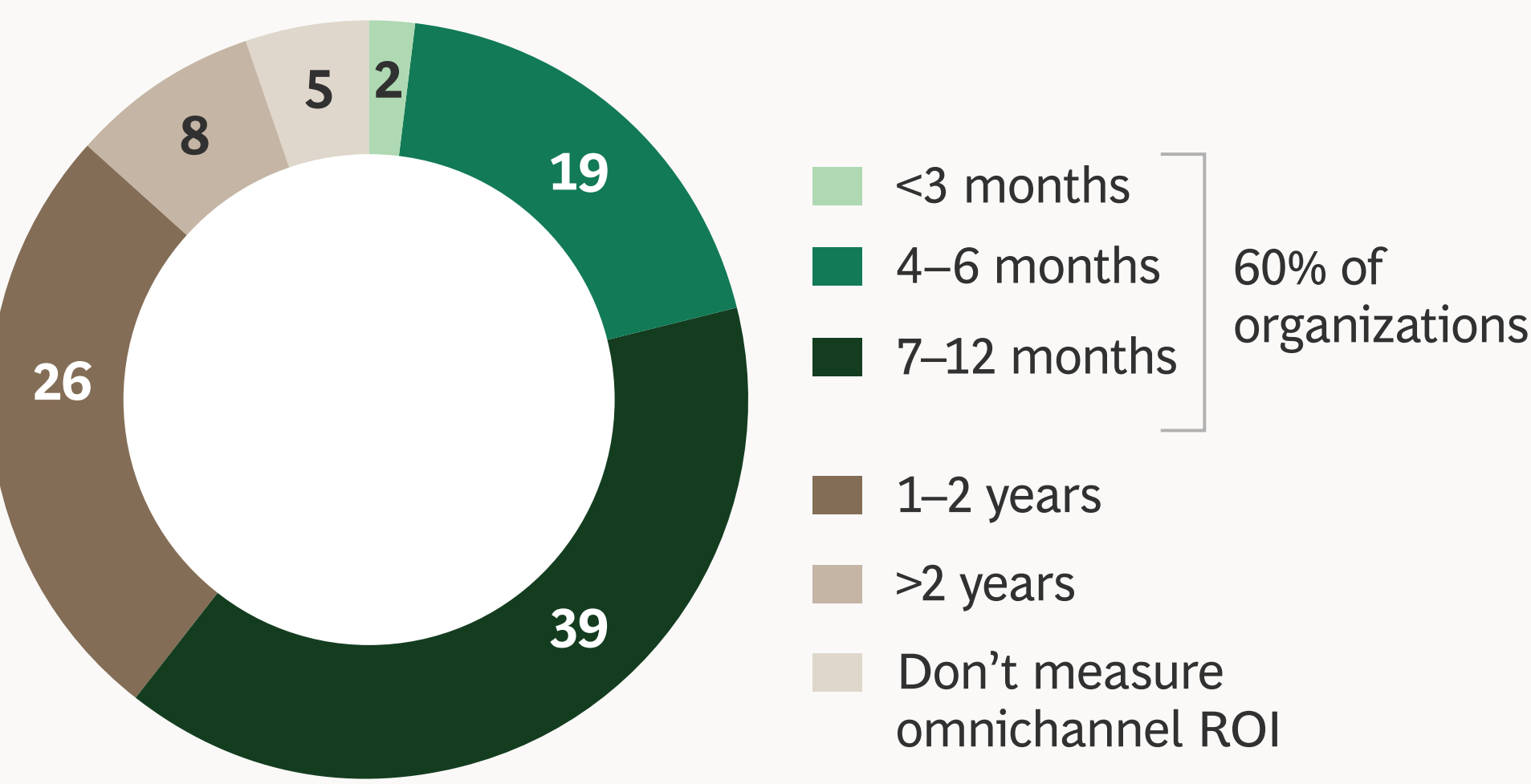|	
No lift to date	4
1%–2%	21
3%–5%	34
6%–10%	30
11%–14%	5
>15%	6

Companies can measure impact from omnichannel in less than 12 months, but KPIs are not reviewed frequently enough
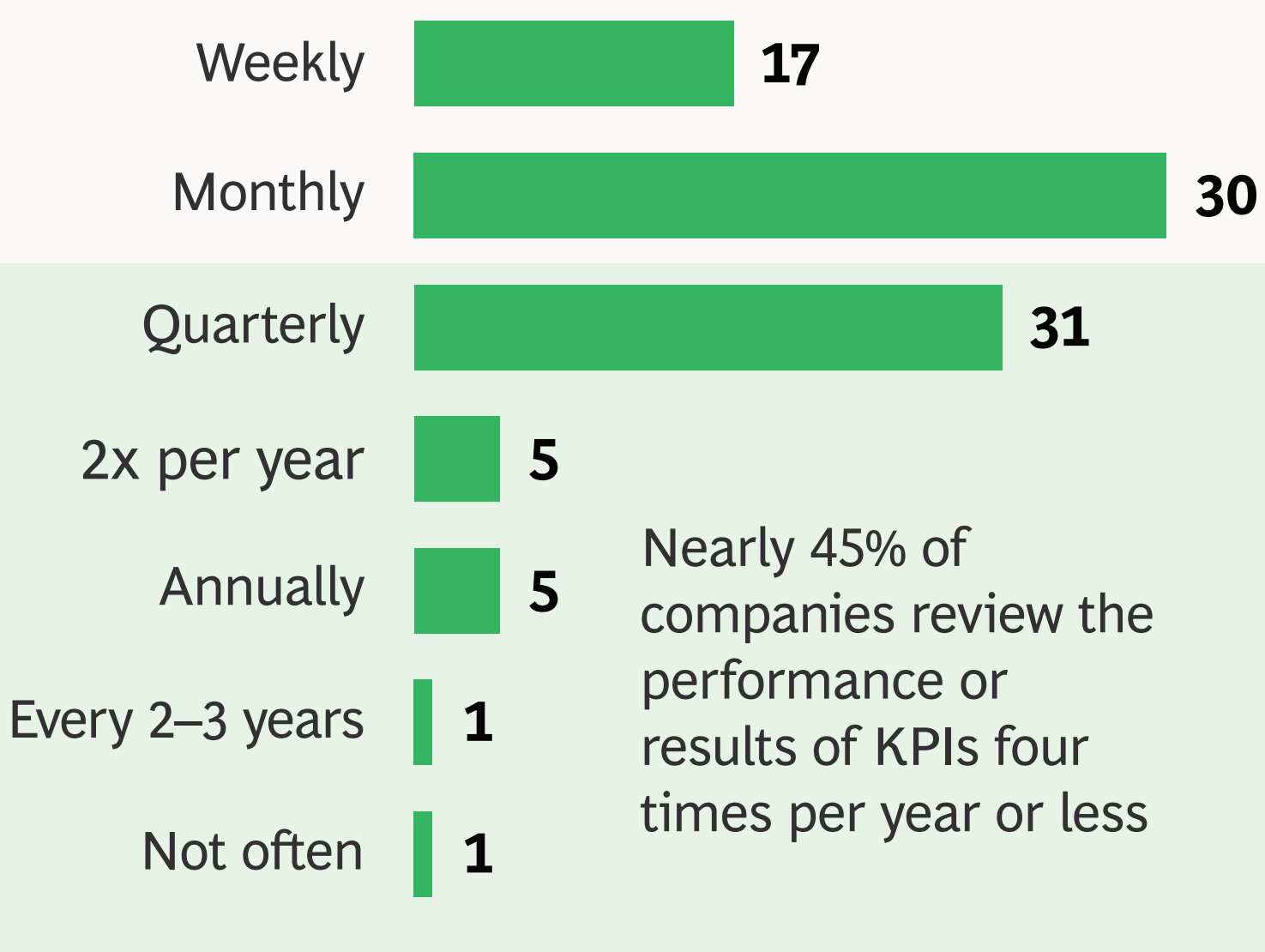
60% of companies see measurable impact from omnichannel in less than 12 months

TIME TO SEE MEASURABLE IMPACT FROM OMNICHANNEL (% OF RESPONDENTS)

- 2
- 19
- 39
- 26
- 8
- 5

Legend:
- <3 months
- 4–6 months   } 60% of organizations
- 7–12 months
- 1–2 years
- >2 years
- Don't measure omnichannel ROI

Only 17% of companies review KPI results more than once a month

FREQUENCY AT WHICH COMPANIES ARE REVIEWING KPIS (% OF RESPONDENTS)

Weekly	17
Monthly	30
Quarterly	31
2x per year	5
Annually	5
Every 2–3 years	1
Not often	1

Nearly 45% of companies review the performance or results of KPIs four times per year or less

"We defined the OKRs we were going to consistently track in every market and set up a frequent touchpoint to review them.

Head of digital (biopharma)

Omnichannel team structure does not correlate to impact

Types of omnichannel team structures

68%
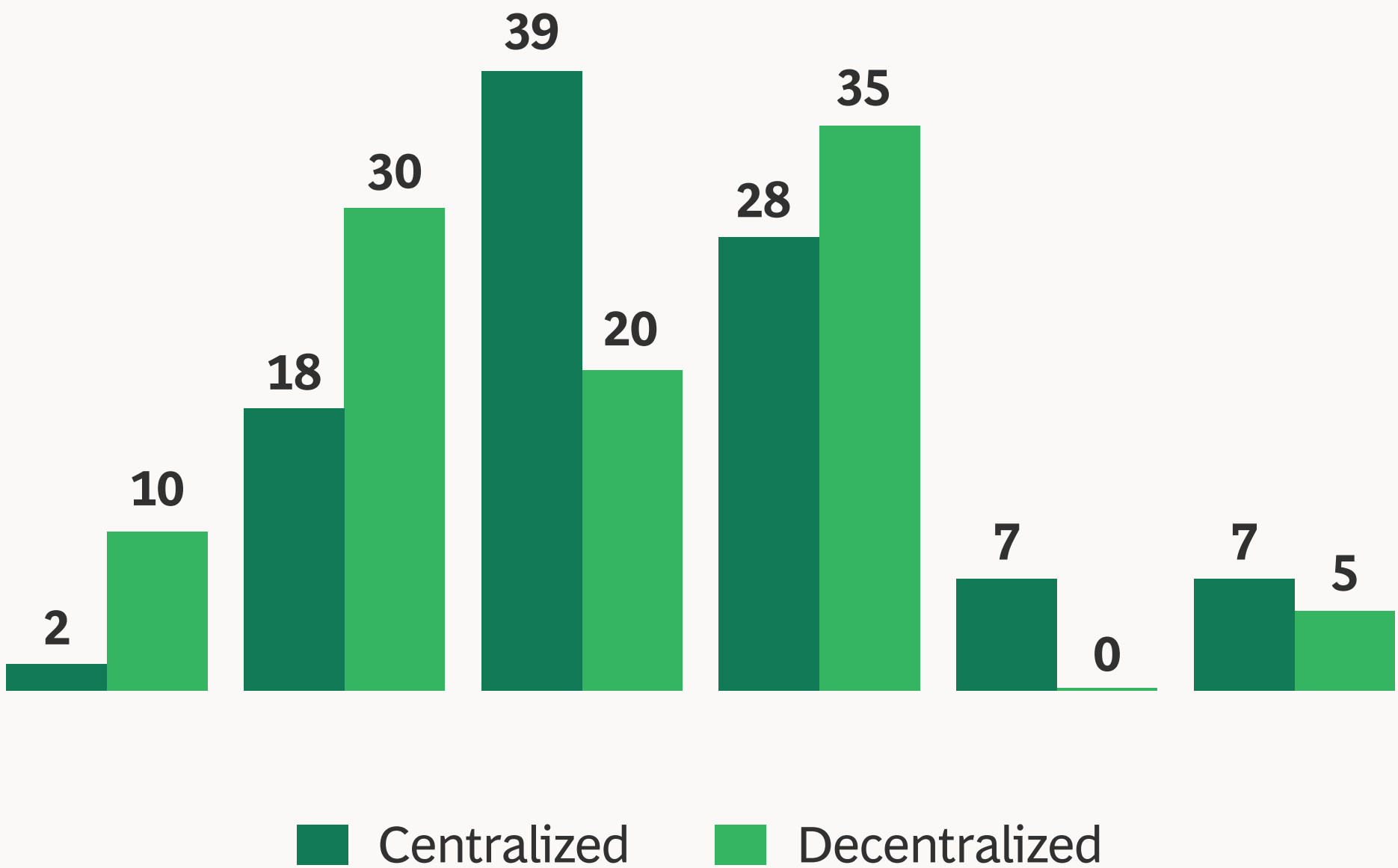of companies

Centralized

- 70% sit in commercial operations or marketing
- About half of companies with centralized omnichannel functions have 10–50 full-time employees

32%
of companies

Decentralized

- Omnichannel functions mostly sit across commercial operations, marketing, and sales
- Most decentralized organizations have 25 or fewer full-time employees

Revenue lift[1] from omnichannel does not seem to correlate with centralized or decentralized structure
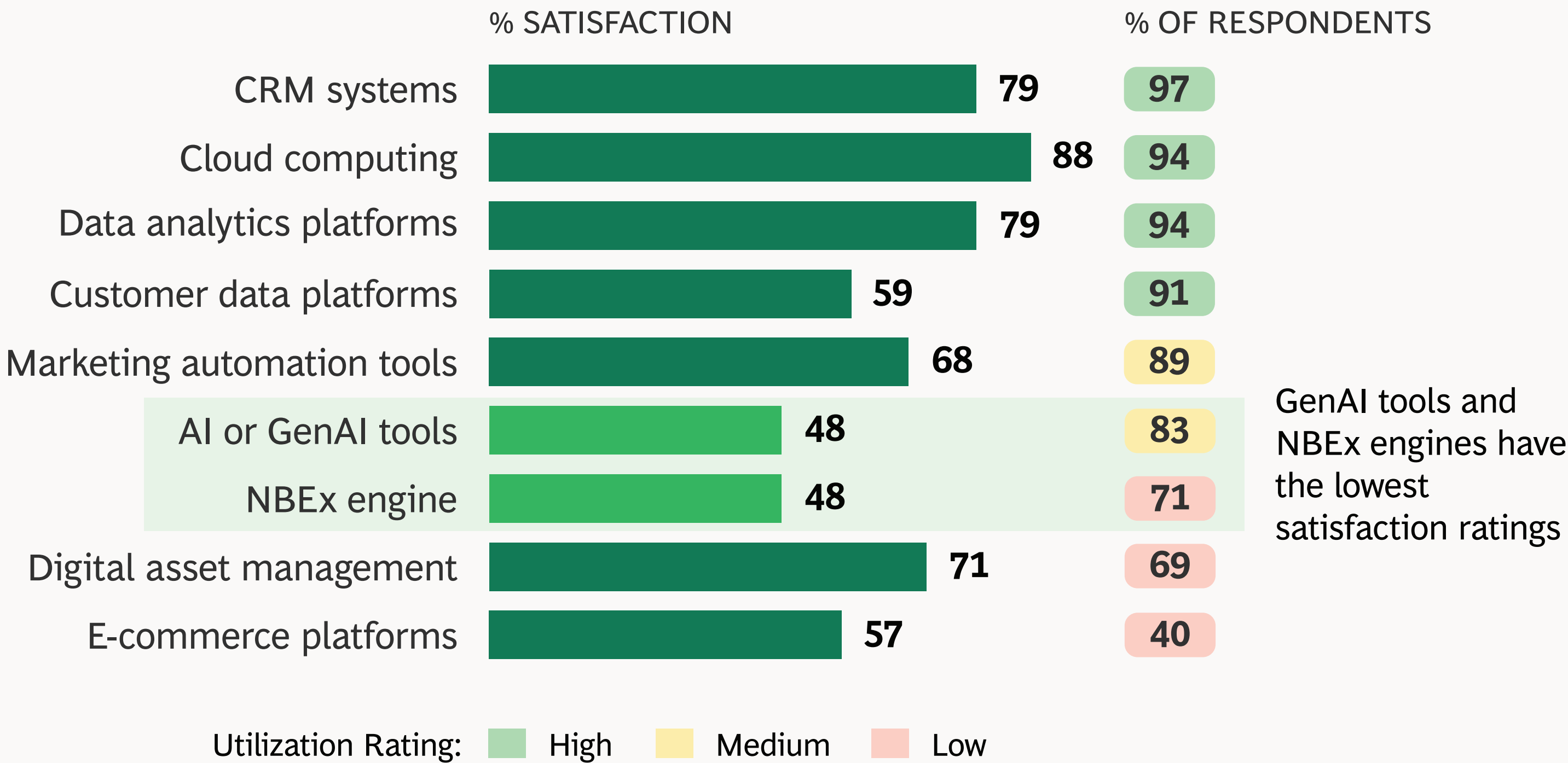
(% OF RESPONDENTS)

Bar chart values:
- 2 (Centralized), 10 (Decentralized)
- 18 (Centralized), 30 (Decentralized)
- 39 (Centralized), 20 (Decentralized)
- 28 (Centralized), 35 (Decentralized)
- 7 (Centralized), 0 (Decentralized)
- 7 (Centralized), 5 (Decentralized)

Legend: ■ Centralized ■ Decentralized

Most customer engagement and management platforms are still not fully integrated

Company satisfaction level with customer engagement platforms[1]

	% SATISFACTION	% OF RESPONDENTS
CRM systems	79	97
Cloud computing	88	94
Data analytics platforms	79	94
Customer data platforms	59	91
Marketing automation tools	68	89
AI or GenAI tools	48	83
NBEx engine	48	71
Digital asset management	71	69
E-commerce platforms	57	40

GenAI tools and NBEx engines have the lowest satisfaction ratings

Utilization Rating: ■ High ■ Medium ■ Low

Less than 10% of companies have fully integrated customer engagement and management platforms

Not integrated	3%
Minimally integrated	20%
Partially integrated	68%
Fully integrated	9%
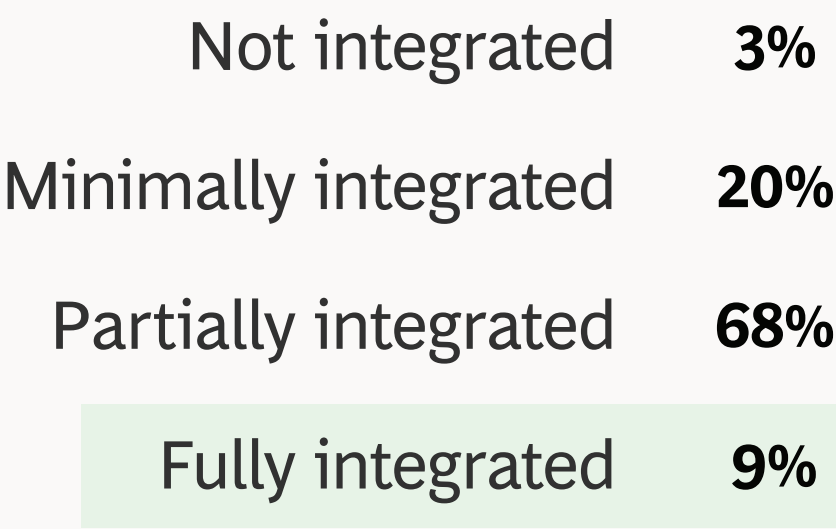
" What we did very well was to align with IT right from concept, have an IT champion, and then push for collaboration across the layers.

Head of commercial strategy (medtech)
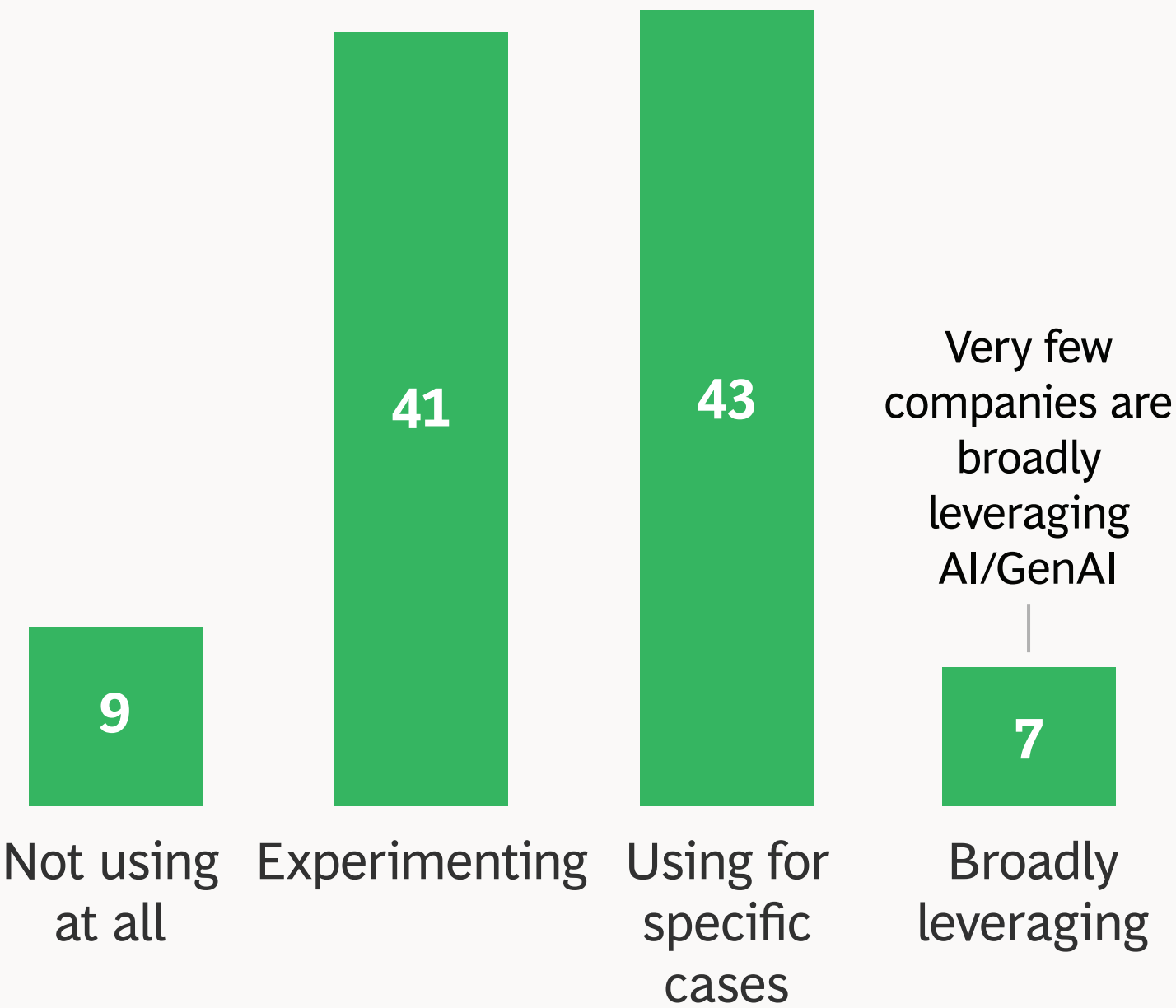
Biopharma and medtech companies of all sizes need clear roadmaps to capture maximum value from AI/GenAI as part of omnichannel

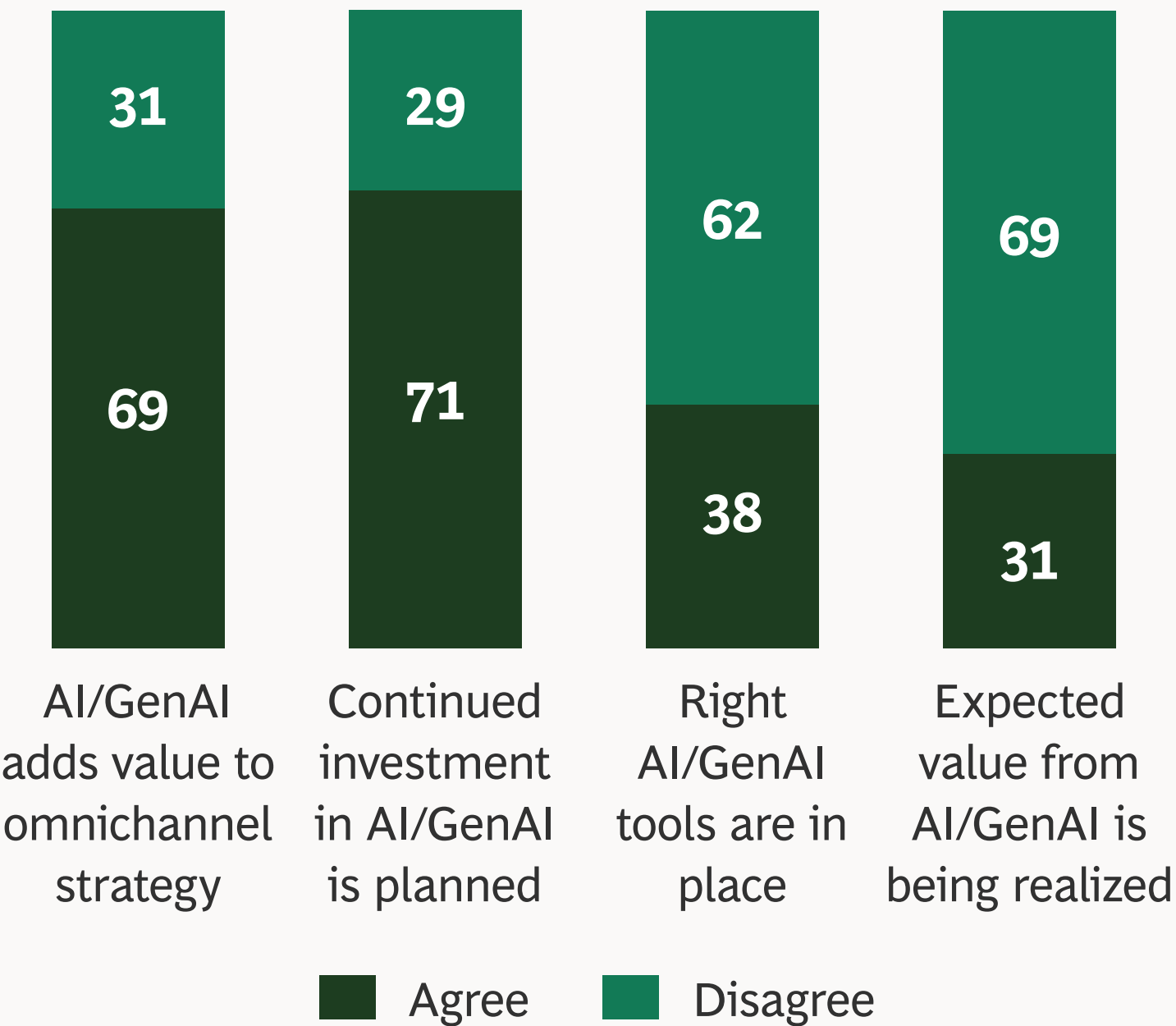## Companies are not broadly leveraging AI/GenAI for omnichannel strategy and implementation

ADOPTION RATE OF AI/GENAI (% OF RESPONDENTS)

Not using at all	Experimenting	Using for specific cases	Broadly leveraging
9	41	43	7

Very few companies are broadly leveraging AI/GenAI
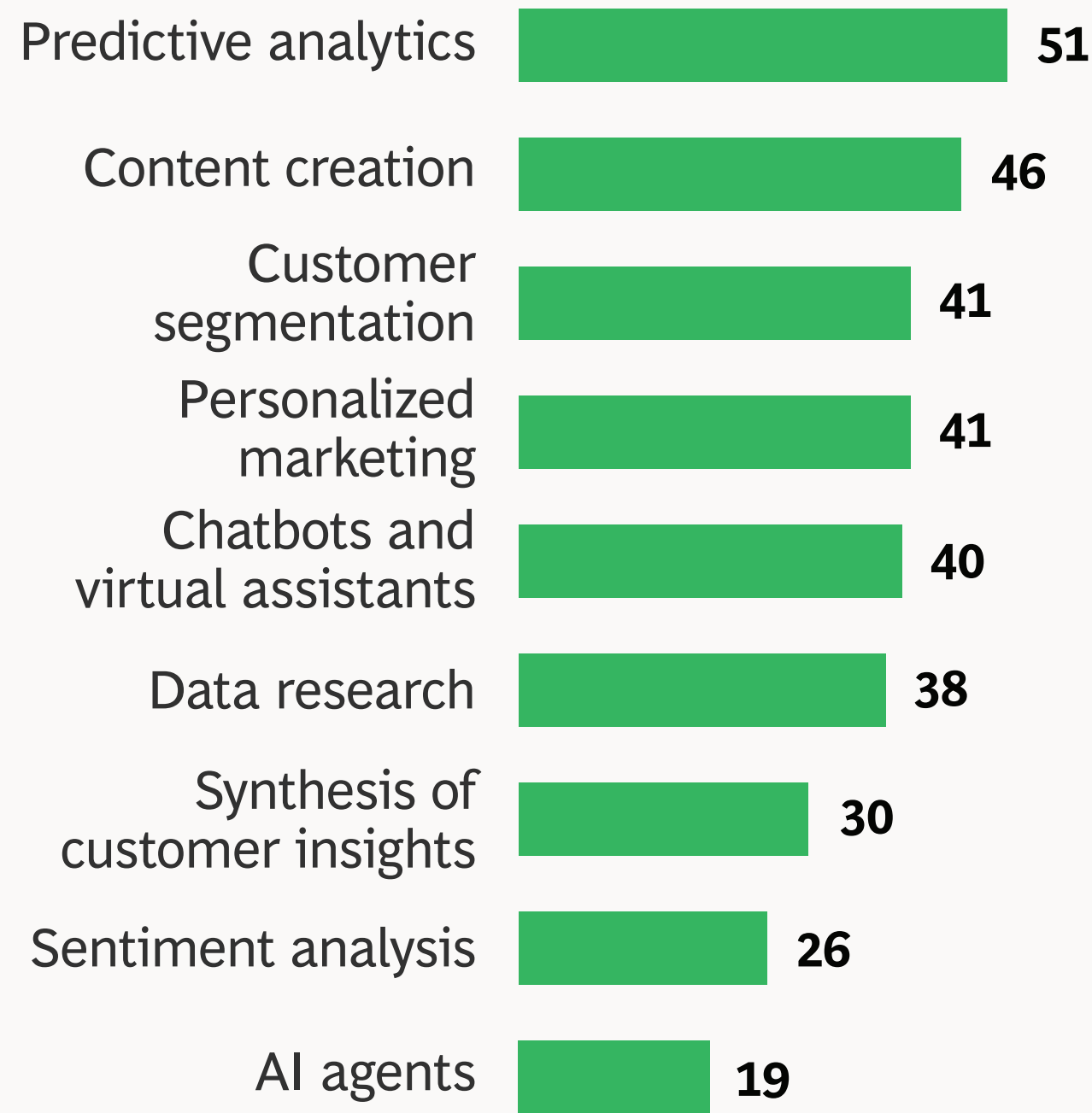
For most companies, AI/GenAI value has not yet been realized

VALUE CAPTURED OF AI/GENAI (% OF RESPONDENTS)

69% of companies see value in AI/GenAI for omnichannel but only 31% have realized that value

	Agree	Disagree
AI/GenAI adds value to omnichannel strategy	69	31
Continued investment in AI/GenAI is planned	71	29
Right AI/GenAI tools are in place	38	62
Expected value from AI/GenAI is being realized	31	69

■ Agree   ■ Disagree

Opportunity to expand and scale AI/GenAI use cases

USE CASES OF AI/GENAI FOR OMNICHANNEL (% OF RESPONDENTS)

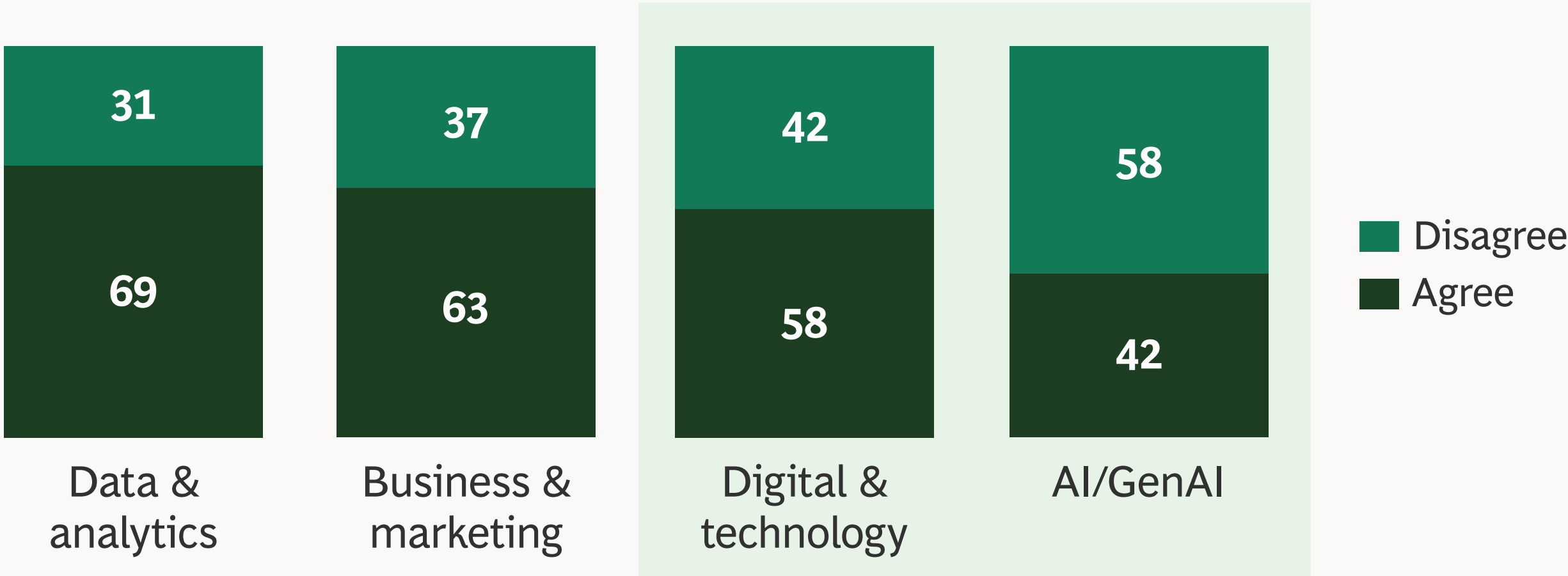| Use case	Value
Predictive analytics	51
Content creation	46
Customer segmentation	41
Personalized marketing	41
Chatbots and virtual assistants	40
Data research	38
Synthesis of customer insights	30
Sentiment analysis	26
AI agents	19

Source: BCG 2025 omnichannel survey.
Note: Q14—Are you currently using AI/GenAI for omnichannel strategy and implementation? Q46—If using AI or GenAI, in which omnichannel areas are these technologies applied? (select all that apply); Q49—To what extent do you agree with the following statements about AI/GenAI in your company's omnichannel strategy?

The right talent and training for omnichannel are not fully in place, particularly for AI/GenAI

Skills in digital and technology and AI/GenAI are lagging

PERSPECTIVE ON WHETHER THE RIGHT TALENT AND SKILL SETS ARE IN PLACE TO EXECUTE OMNICHANNEL (% OF RESPONDENTS)

	Disagree	Agree
Data & analytics	31	69
Business & marketing	37	63
Digital & technology	42	58
AI/GenAI	58	42

> "To have a good omnichannel execution, you need to have people with the business expertise on the field and also the right technical team to develop it.
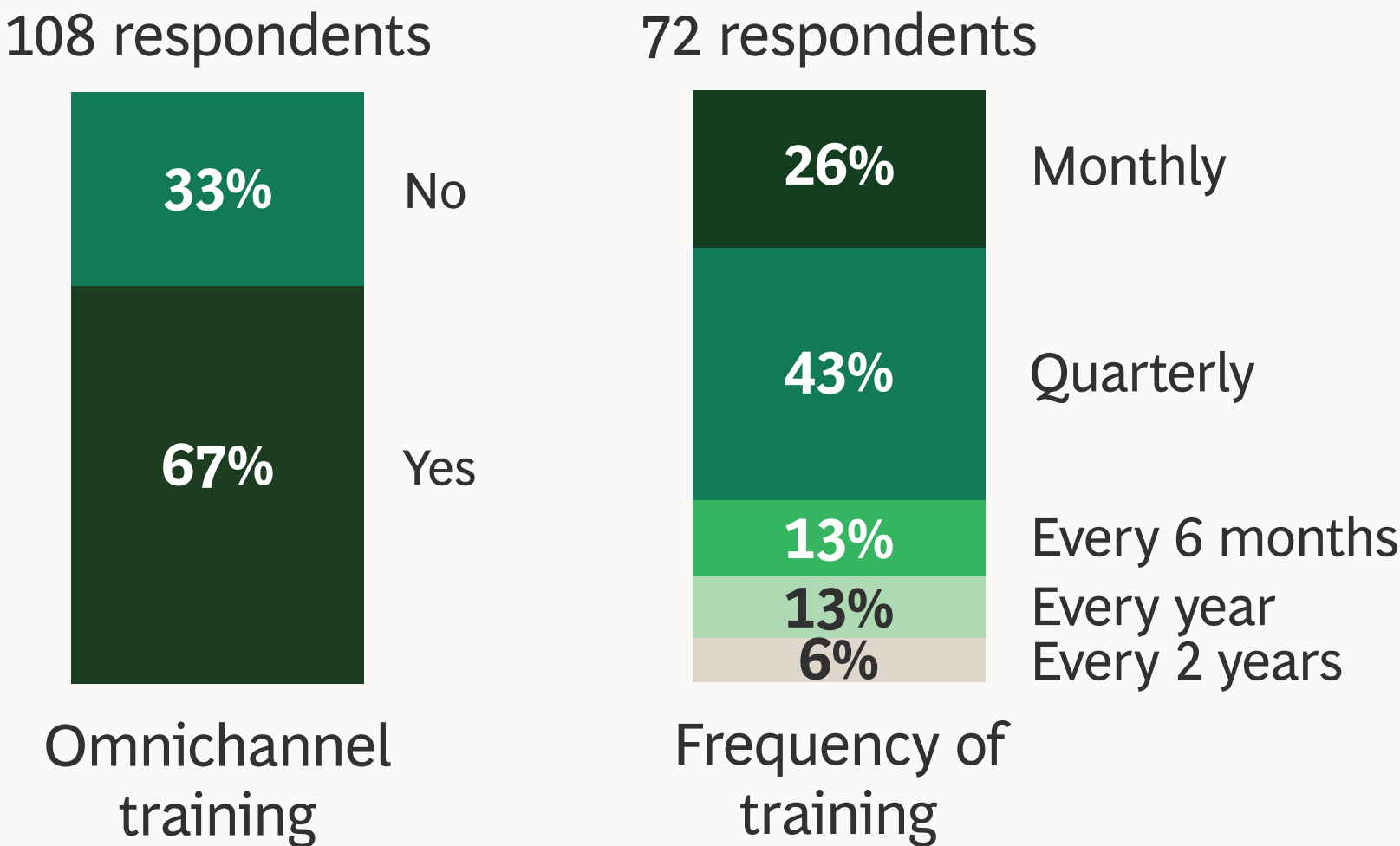>
> **Head of commercial strategy (medtech)**

One-third of respondents do not offer omnichannel training

TRAINING OFFERED AND FREQUENCY OF TRAINING

108 respondents

Omnichannel training
- 33% No
- 67% Yes

72 respondents

Frequency of training
- 26% Monthly
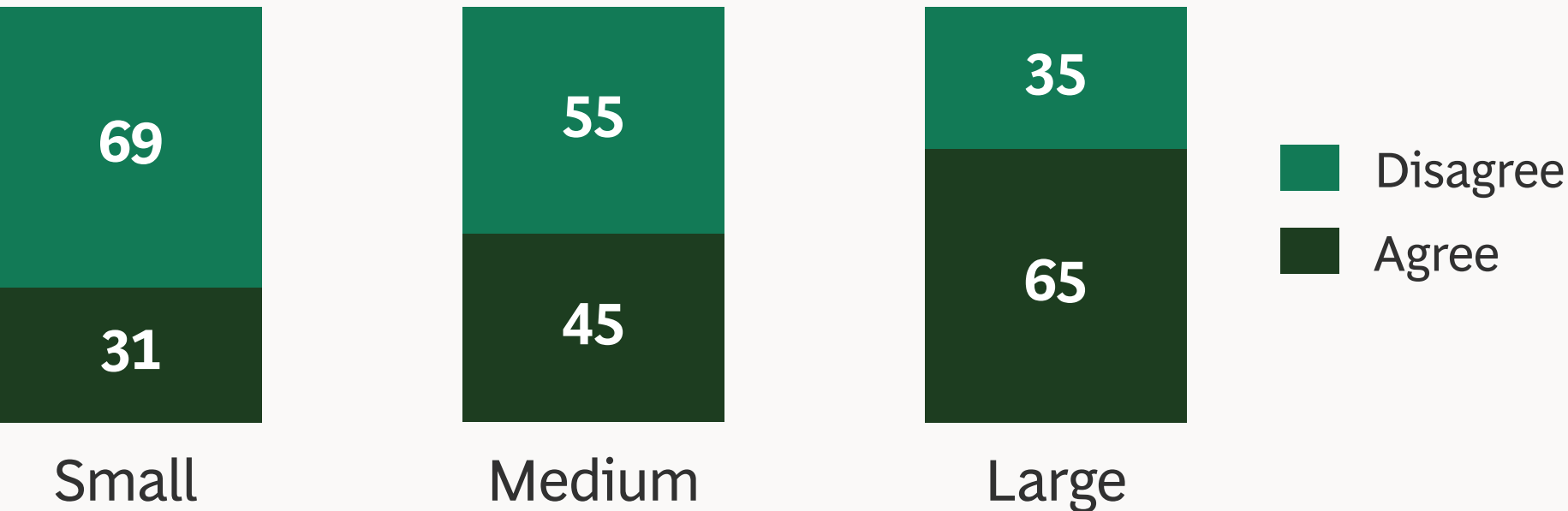- 43% Quarterly
- 13% Every 6 months
- 13% Every year
- 6% Every 2 years

94% of respondents say they do not have access to "highly effective" omnichannel training

Many biopharma and medtech companies do not have the right change management in place to capture the full value of omnichannel

Approximately half of companies do not think they have the right change management in place

PERCEPTION ON HAVING THE RIGHT CHANGE MANAGEMENT IN PLACE TO ENABLE TEAMS AND FULLY CAPTURE OMNICHANNEL VALUE (% OF RESPONDENTS)

Small	Medium	Large
69	55	35
31	45	65

- Disagree
- Agree

The majority of respondents struggle with cross-functional orchestration and governance

PERCEPTION ON HAVING . . . (% OF RESPONDENTS)

| Cross-functional orchestration to provide a coherent customer experience	Governance model in place to make optimal business decisions
53	62
47	38

- Disagree
- Agree

> "The biggest challenge is never technical. It is change management (reps using or adhering to the NBEx) and depth of data (especially outside the US).
>
> **Head of data and analytics** (biopharma)
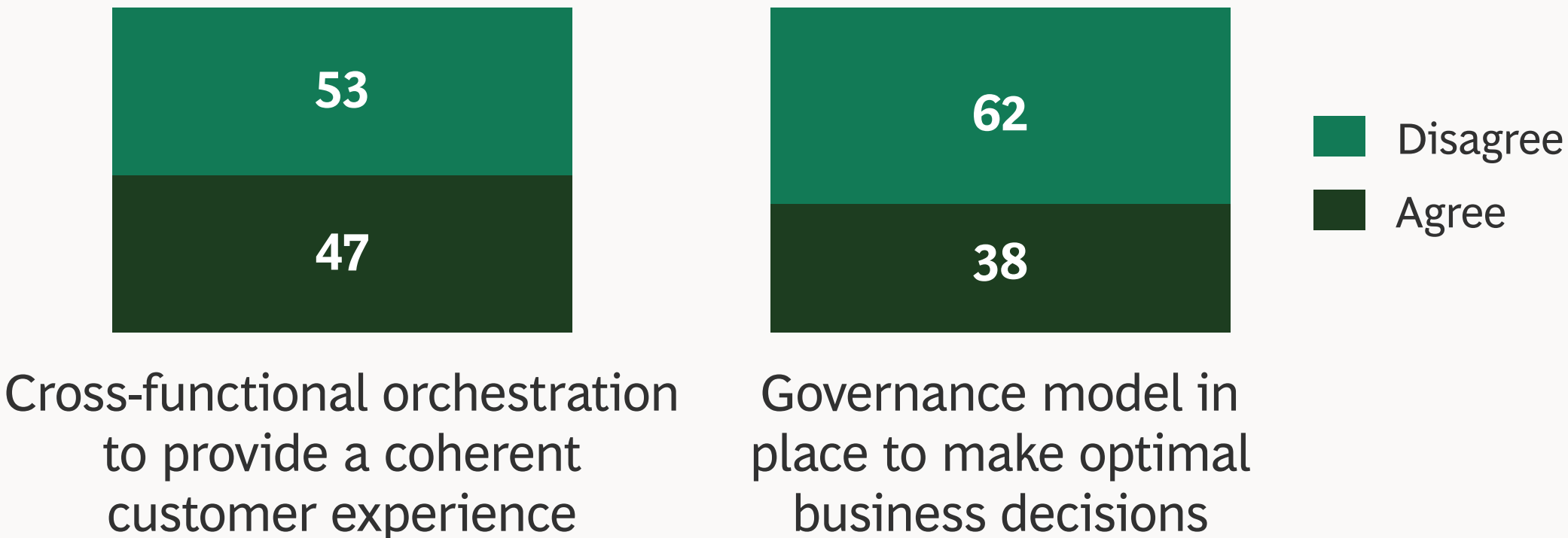
> To successfully implement, you need governance, change management, and leadership commitment.
>
> **SVP, customer experience** (biopharma)

Source: BCG 2025 omnichannel survey.
Note: NBEx = next-best experience. Q11—Please indicate your perspective on your company's omnichannel strategy and execution; Q56—To what extent does your company have the following capabilities in its omnichannel execution?
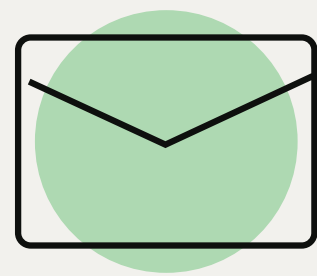
Contact Us

Please contact our Commercial AI team at HCCommercialAI@bcg.com to conduct a comprehensive omnichannel maturity assessment or for additional information and insights.