ACROSS HEALTH

a precision value & health team

The webinar series

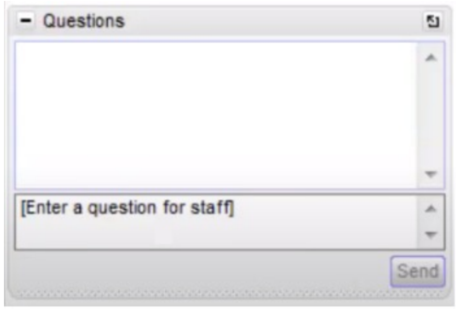
FEB to SEP 2022

Looking back & forward:
Key trends in the HCP mix

Webinar #1 – THURSDAY 24/02

Ground rules

- This webinar will take around **40 minutes**, followed by questions
- You can submit **questions** at any time via the "Questions" box



- **Please give us your feedback!**
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!

- The webinar will be **recorded** and made available after the session. We will send you an email with the details

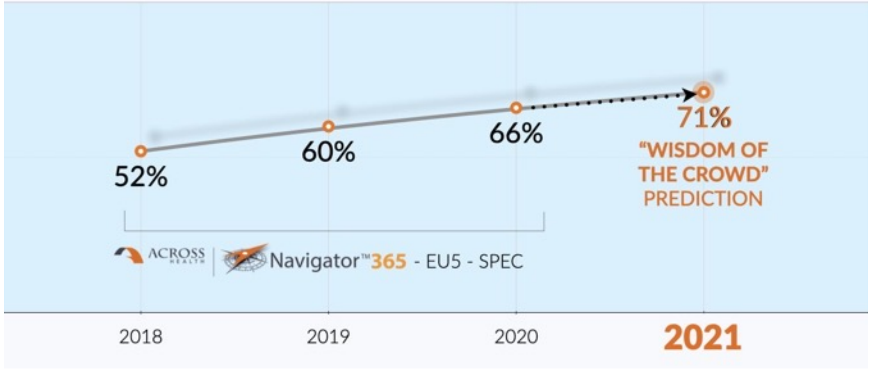
Agenda

1	"Wisdom of the crowd" predictions 2021
2	OCE - Emerging changes/trends at the customer level ("demand")
3	OCE - Emerging changes/trends at the pharma level ("supply")
4	Reimagine the future

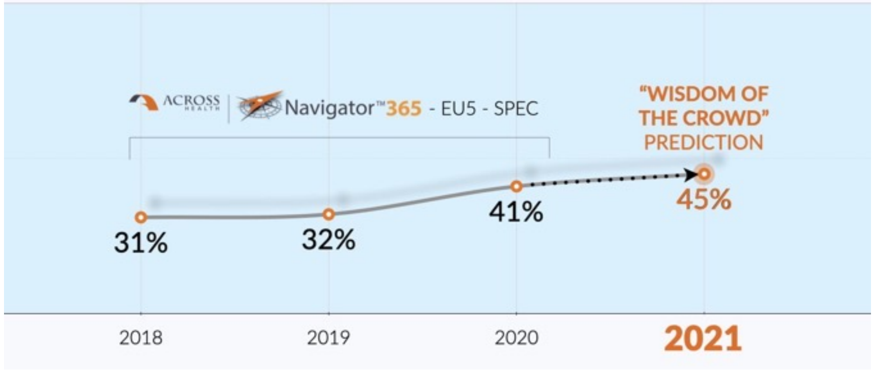
This is what 100+ respondents said in January 2021…

The wisdom of crowds

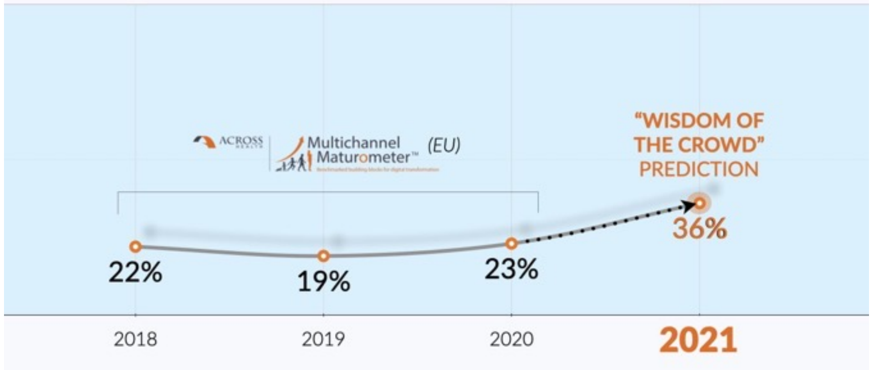
1. HCP INTEREST in digital pharma offerings



2. HCP SATISFACTION with pharma digital communication



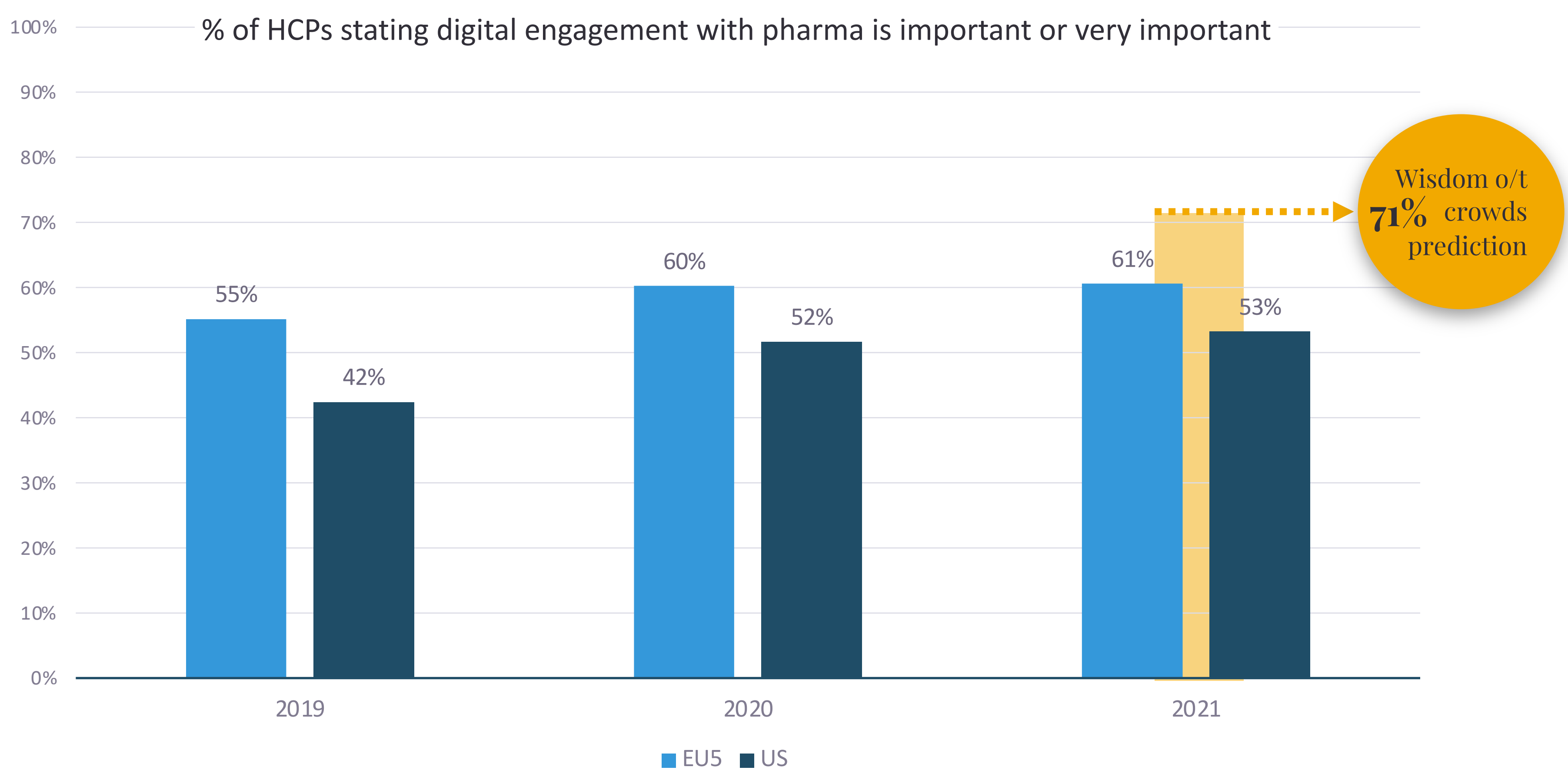
3. SHARE OF MARKETING BUDGET allocated to digital



Reimagine customer engagement
Webinars

One year later…

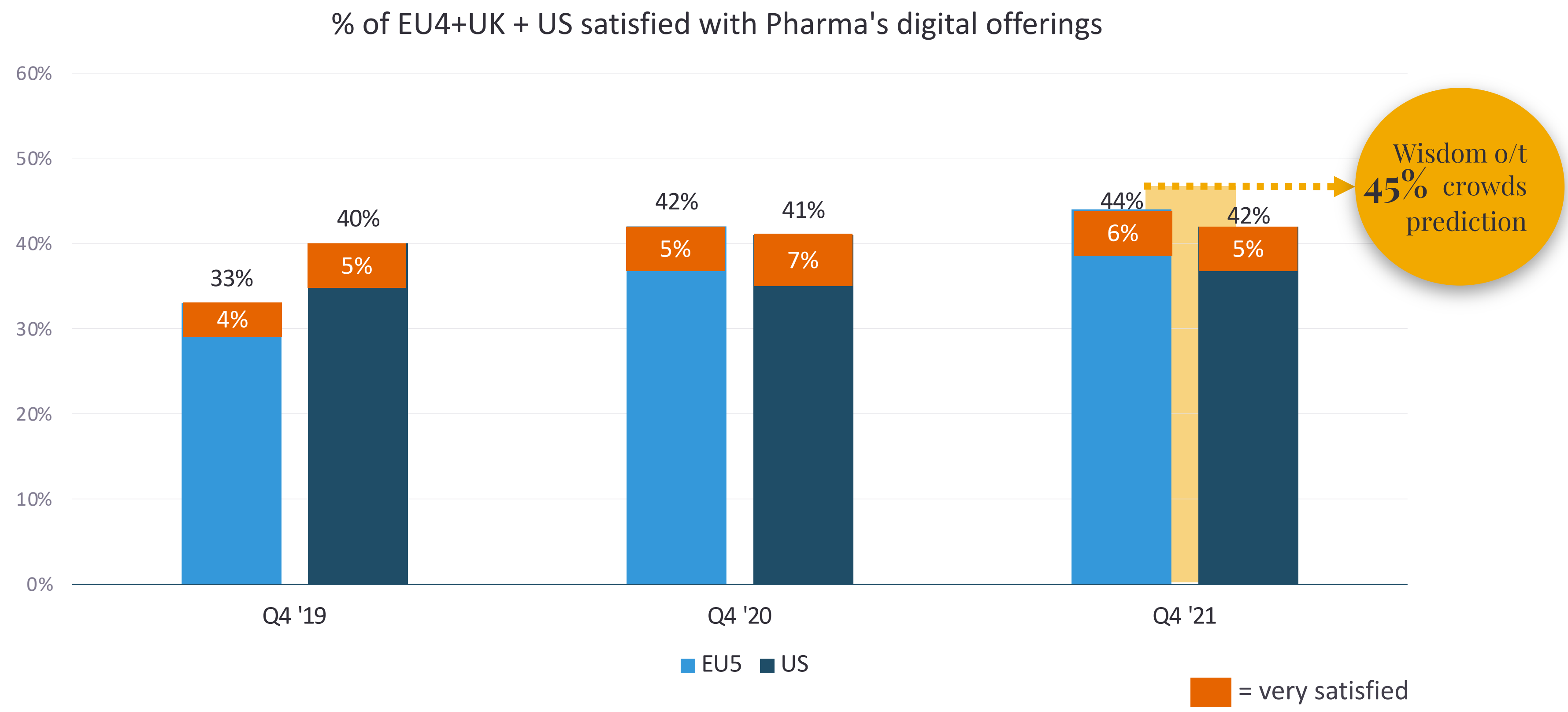
#1 HCP interest in pharma digital offerings



Source: Navigator365™ Core Specialists EU4+UK + US

2019 Q4, N = 5,112 - **2020 Q4,** N = 3,779 - **2021 Q4,** N = 6,145

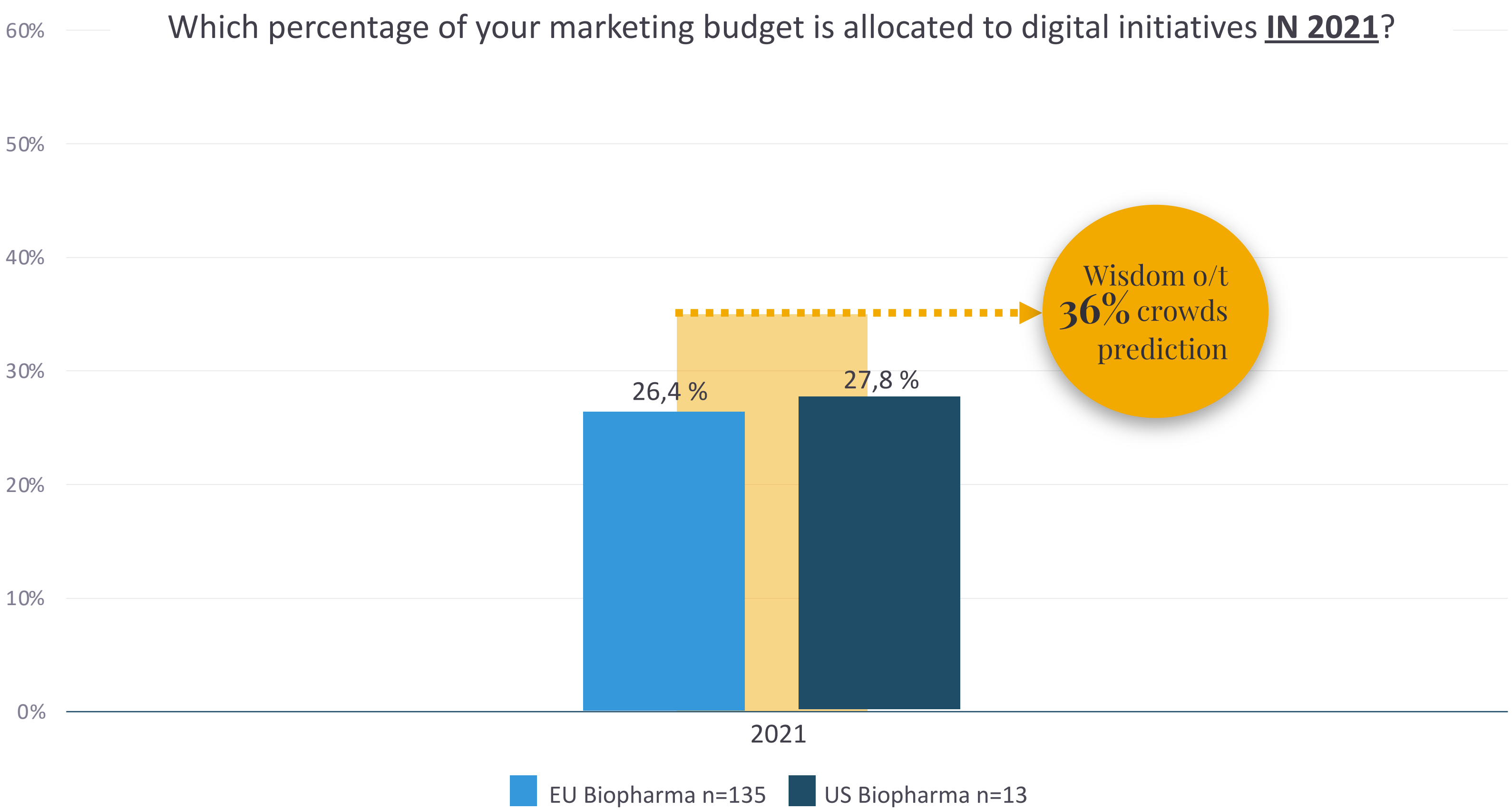
#2 HCP satisfaction with pharma digital offerings



Source: Navigator365™ Core Specialists EU4+UK + US

2019 Q4, N = 5,112 - 2020 Q4, N = 3,779 - 2021 Q4, N = 6,145

#3 Share of marketing budget allocated to digital



Source: Maturometer™ 2021

Agenda

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Navigator365 Core 365 helps at a crucial step – translating your strategic imperatives into a high-impact customer engagement strategy

Brand or medical strategic imperatives

Competitor landscape

Customer journey/leverage points

Market performance and -dynamics

Channel mix and orchestration

Content/service/ asset optimization

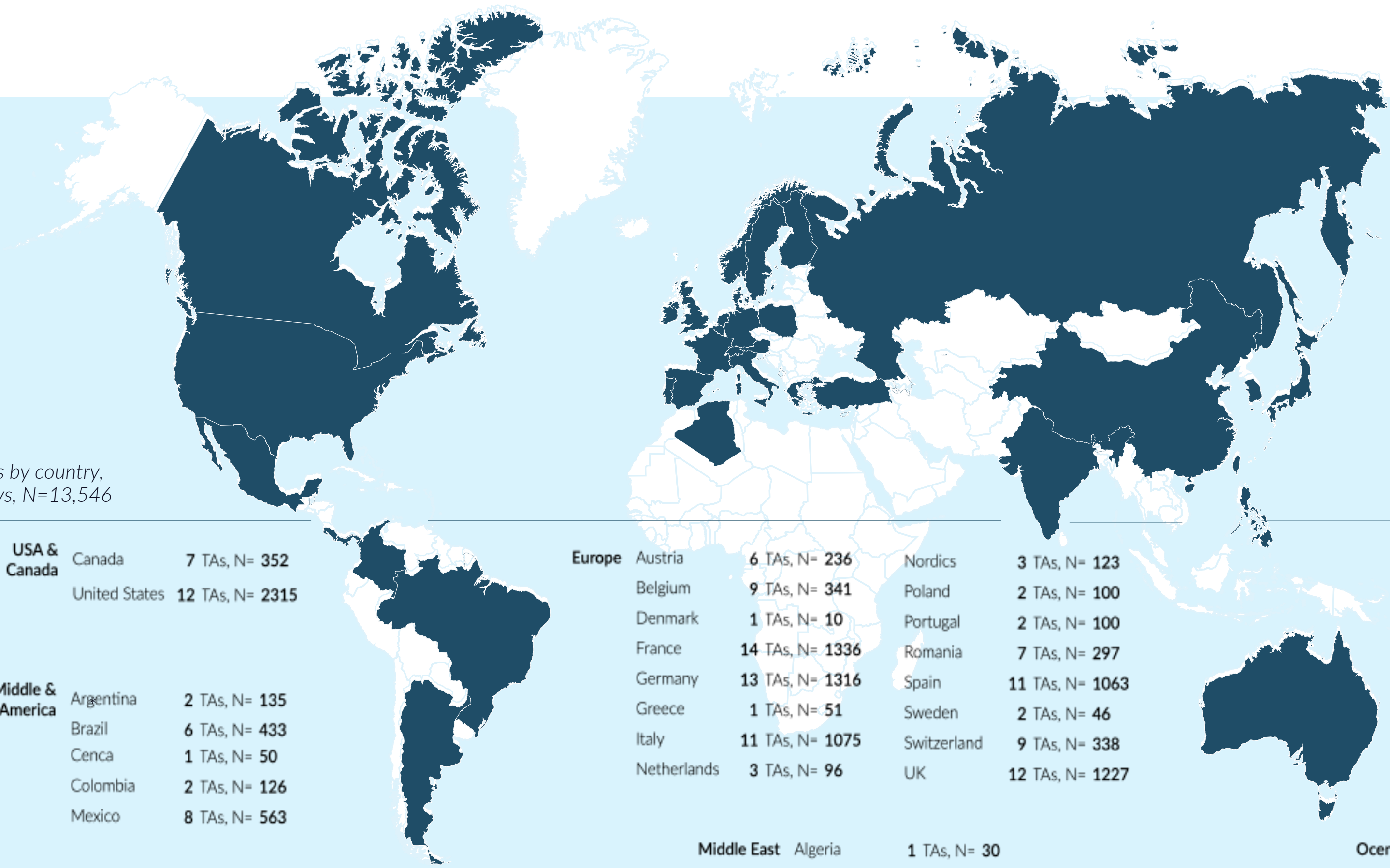
Impact tracking & optimization

www.across.health/offering/navigator DEMO

8 out of 10 find Navigator365™ (much) **better than competition***

* Maturometer 2021

Navigator365 "footprint"



Respondents by country, 2021 surveys, N=13,546

USA & Canada	Canada	7 TAs,	N= **352**
	United States	12 TAs,	N= **2315**
Middle & Latin America	Argentina	2 TAs,	N= **135**
	Brazil	6 TAs,	N= **433**
	Cenca	1 TAs,	N= **50**
	Colombia	2 TAs,	N= **126**
	Mexico	8 TAs,	N= **563**

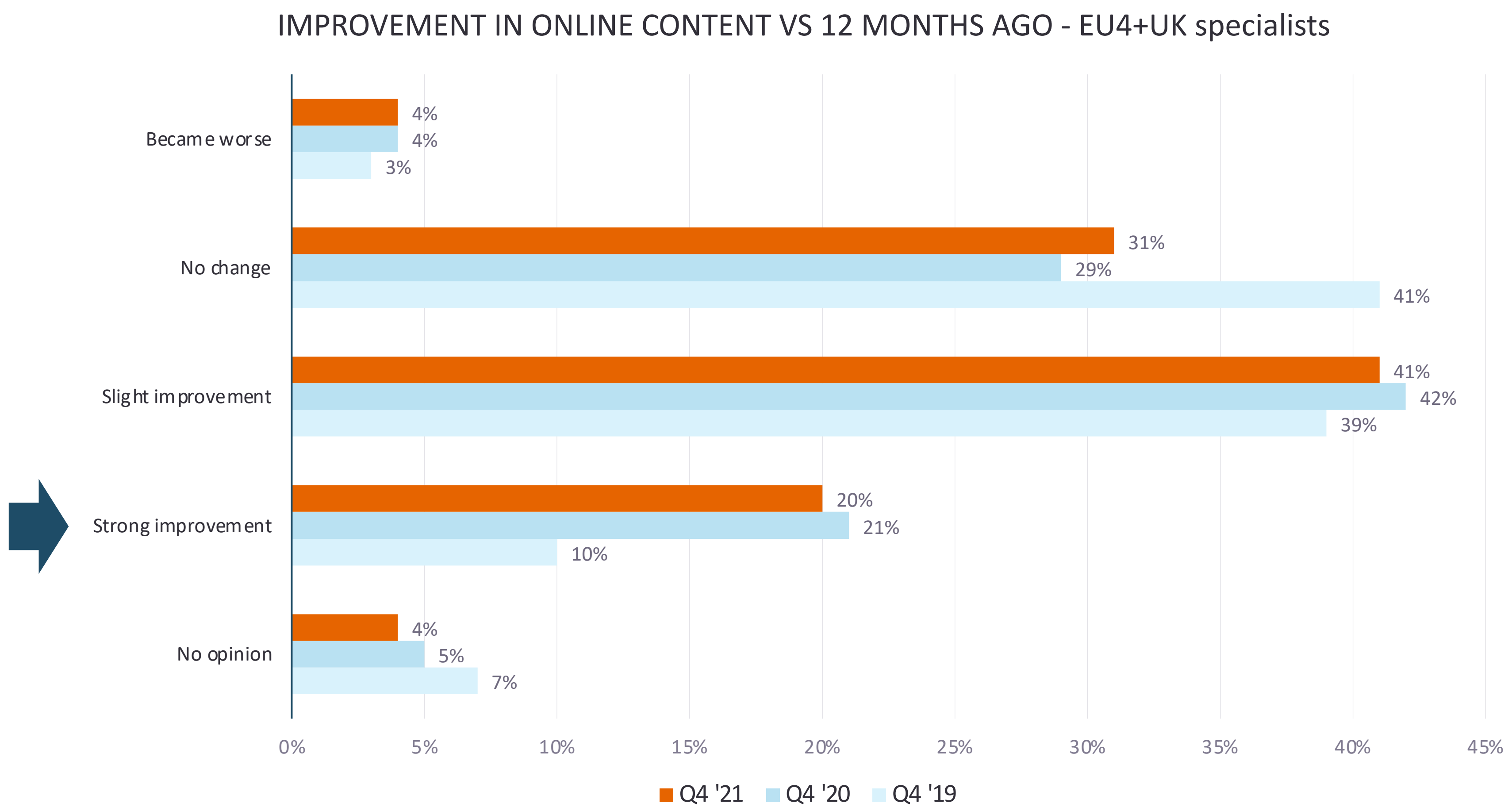
Europe	Austria	6 TAs,	N= **236**
	Belgium	9 TAs,	N= **341**
	Denmark	1 TAs,	N= **10**
	France	14 TAs,	N= **1336**
	Germany	13 TAs,	N= **1316**
	Greece	1 TAs,	N= **51**
	Italy	11 TAs,	N= **1075**
	Netherlands	3 TAs,	N= **96**
	Nordics	3 TAs,	N= **123**
	Poland	2 TAs,	N= **100**
	Portugal	2 TAs,	N= **100**
	Romania	7 TAs,	N= **297**
	Spain	11 TAs,	N= **1063**
	Sweden	2 TAs,	N= **46**
	Switzerland	9 TAs,	N= **338**
	UK	12 TAs,	N= **1227**
Middle East	Algeria	1 TAs,	N= **30**
	Saudi Arabia	4 TAs,	N= **201**
	Turkey	2 TAs,	N= **145**

Asia	China	4 TAs,	N= **357**
	India	1 TAs,	N= **150**
	Japan	3 TAs,	N= **156**
	Philippines	1 TAs,	N= **50**
	Russia	3 TAs,	N= **231**
	South Korea	2 TAs,	N= **101**
	Taiwan	1 TAs,	N= **40**
	Thailand	2 TAs,	N= **104**
	Vietnam	1 TAs,	N= **55**
Ocenania	Australia	4 TAs,	N= **197**

Reimagine customer engagement Webinars

ACROSS HEALTH

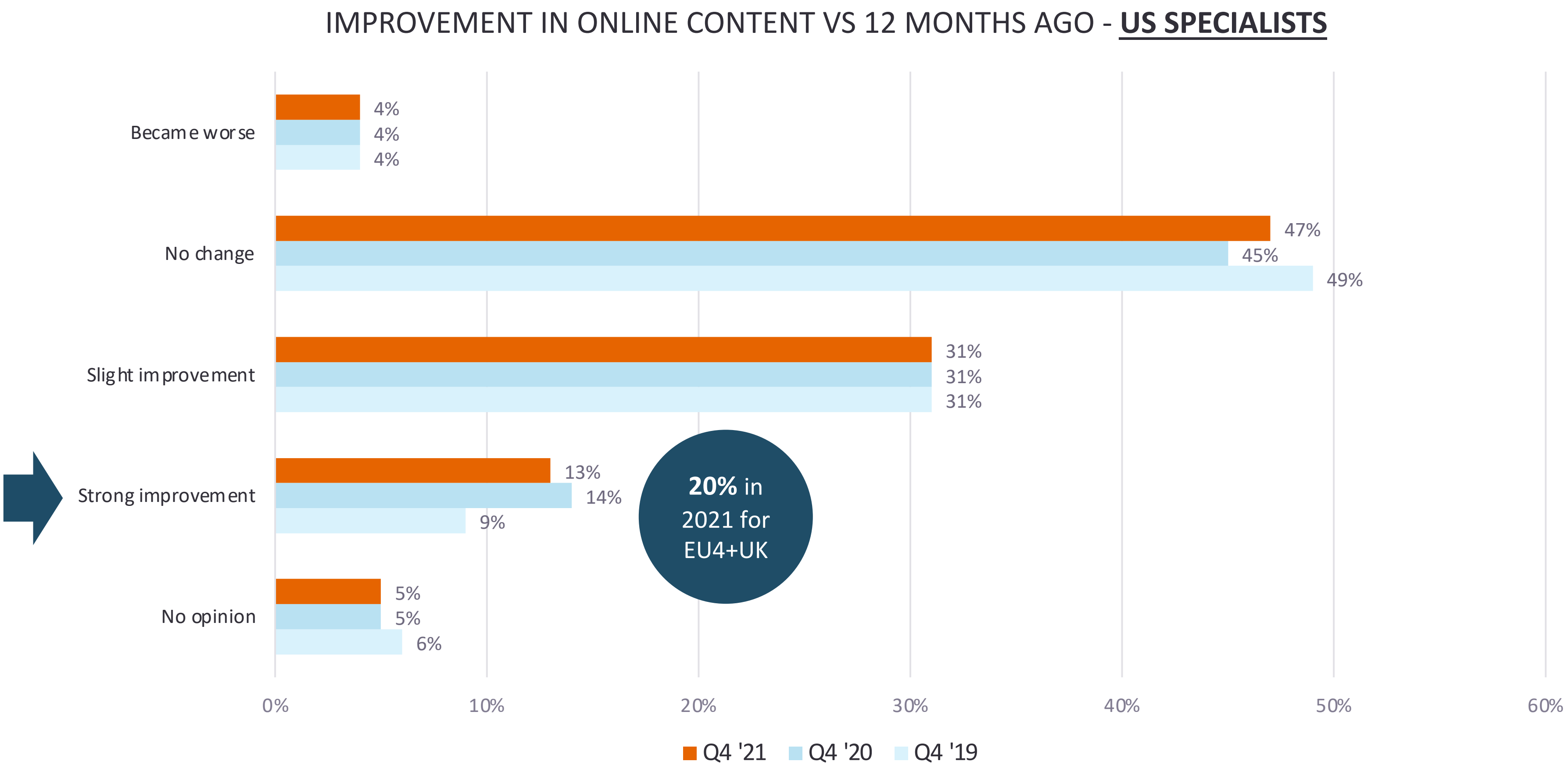
Overall a further improvement in online content can be observed vs pre-C19, but only 1 in 5 see a real boost – and growth stalled in 2021



Source: Navigator365™ Core Specialists EU4+UK

2019 Q4, N = 4,104 - 2020 Q4, N = 2,780 - 2021 Q4, N = 4,333

Also US HCPs see an improvement in online content… but less outspoken than EU4+UK



Source: Navigator365™ Core Specialists US

2019 Q4, N = 1,008 - 2020 Q4, N = 1,000 - 2021 Q4, N = 1,812

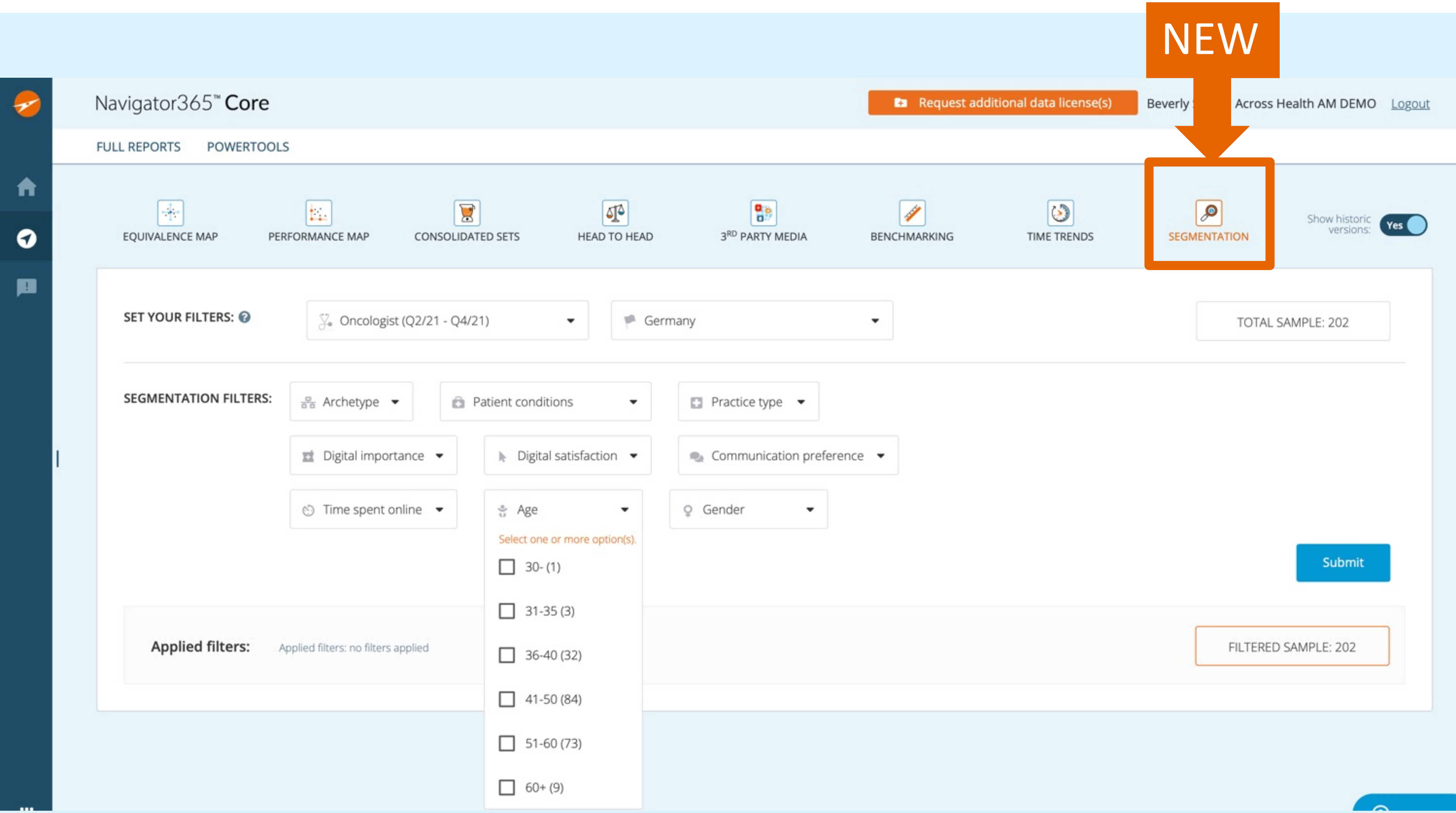
Reimagine customer engagement Webinars

Poll

Which age group of HCPs has changed their communication preferences with pharma most strongly as a result of the pandemic?

1. Pandemic has not affected preferences
2. HCPs aged 30–40 (digital natives)
3. HCPs aged 50–65+ (digital immigrants)
4. Preferences have shifted equally both age groups

The new “segmentation” powerbutton in our Navigator365 Core environment enables you to slice and dice the insights according to several criteria



‘Digital natives’ show a strong shift towards OC preference in both promo & medical in US and ES. ‘Digital immigrants’ show a strong shift in US for promo & medical. Germany is “status quo”

SEGMENTATION

ONCOLOGISTS — F2F ONLY ENGAGEMENT **PROMO**

AGE group	30 -40		50 - 65+	
YEAR	2019 Q4	2021 Q4	2019 Q4	2021 Q4
Spain	41%	29%	57%	53%
Germany	42%	42%	53%	45%
US	39%	23%	67%	29%

ONCOLOGISTS — F2F ONLY ENGAGEMENT **MEDICAL**

AGE group	30 -40		50 - 65+	
YEAR	2019 Q4	2021 Q4	2019 Q4	2021 Q4
Spain	31%	21%	46%	53%
Germany	17%	31%	32%	38%
US	33%	27%	43%	23%

Source: Navigator365™ Core Oncologists

Spain +, Germany + US 2019 Q4, N = 696 - Spain + Germany + US 2021 Q4, N = 1,158

Dynamic segmentation will be key moving forward !

Archetype analysis for German Oncologists

Independents

- Do not place much value on interactions with pharmaceutical companies
- Rely on evidence-based materials
- Tend to be slower to try new medication

Transactionals

- Only value samples from pharmaceutical companies
- Cost conscious
- Most receptive to patient's preferences
- Tend to be slower to try new medication

Knowledge seekers

- Interested in educational programmes offered by pharmaceutical companies
- Do not value informal talks or samples
- Least receptive to patient's preferences
- Tend to be early adopters and pro-pharma

Relationship seekers

- Look forward to interactions with reps and pharmaceutical companies, and other clinicians
- Value samples and education from pharmaceutical companies
- Tend to be earlier adopters of new medication

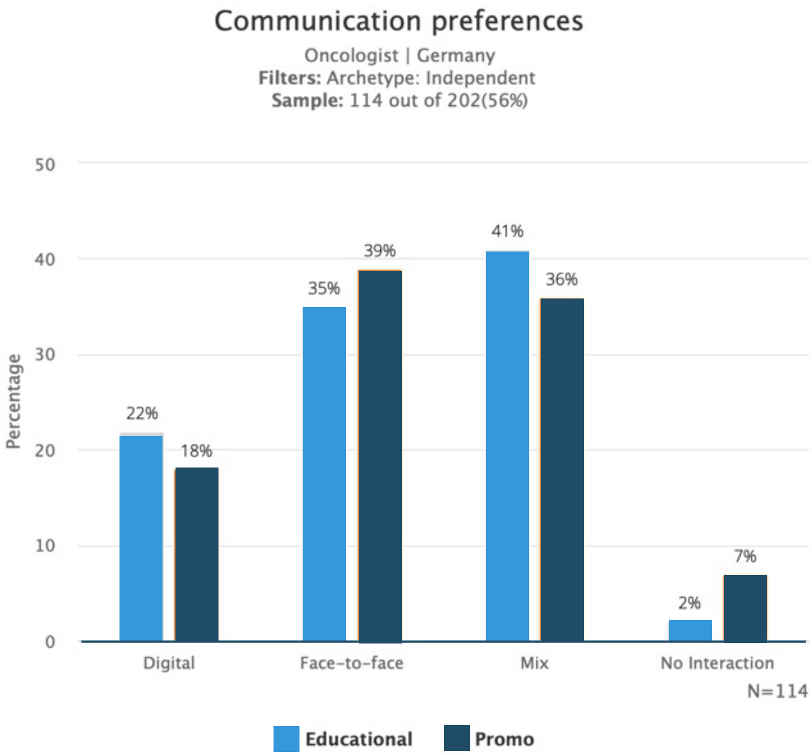
2021 Q4, Independent N = 114 - Relationship seeker N = 40

Dynamic segmentation will be key moving forward !

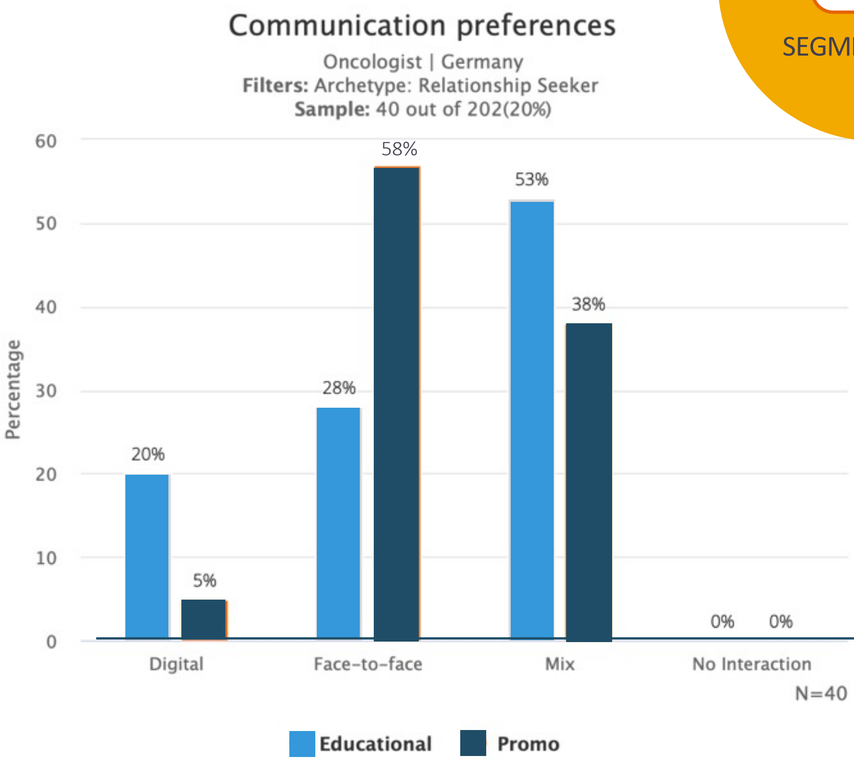
Archetype analysis for German Oncologists

SEGMENTATION

Independent archetype (56%)



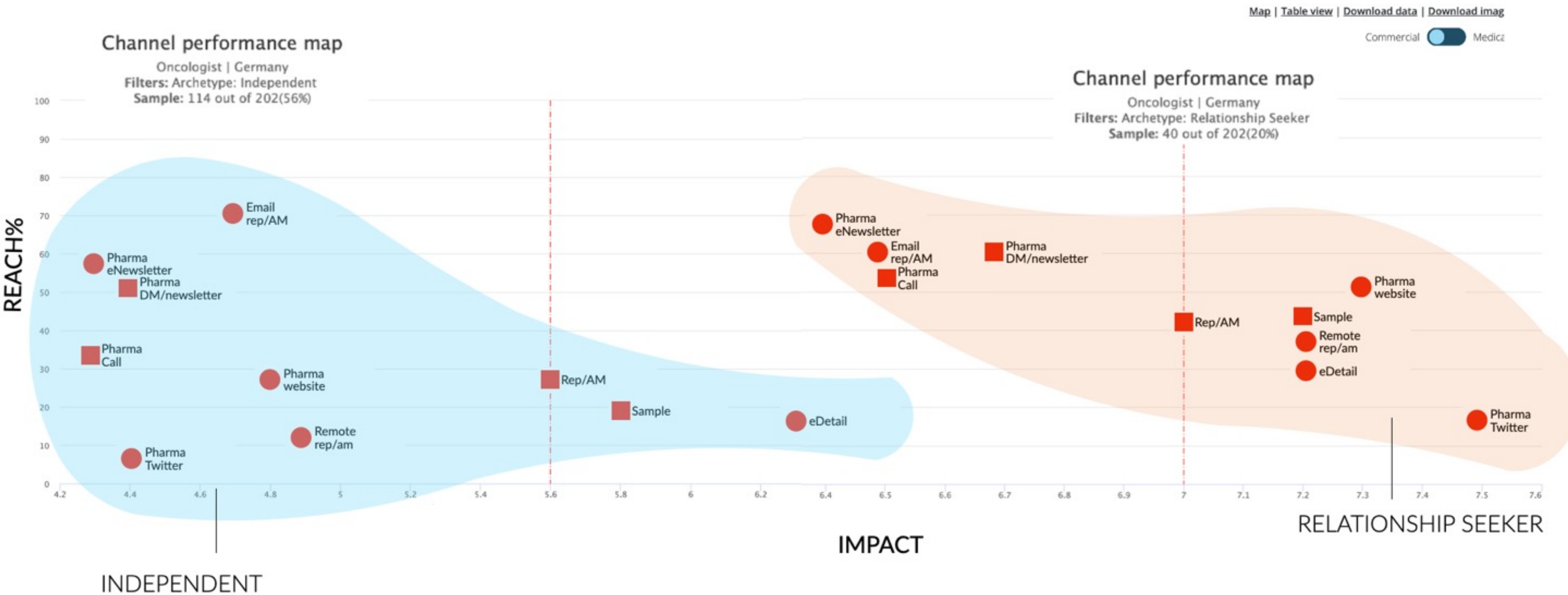
Relationship seekers (20%)



Source: Navigator365™ Core Oncologists GER

2021 Q4, Independent N = 114 - Relationship seeker N = 40

SEGMENTATION

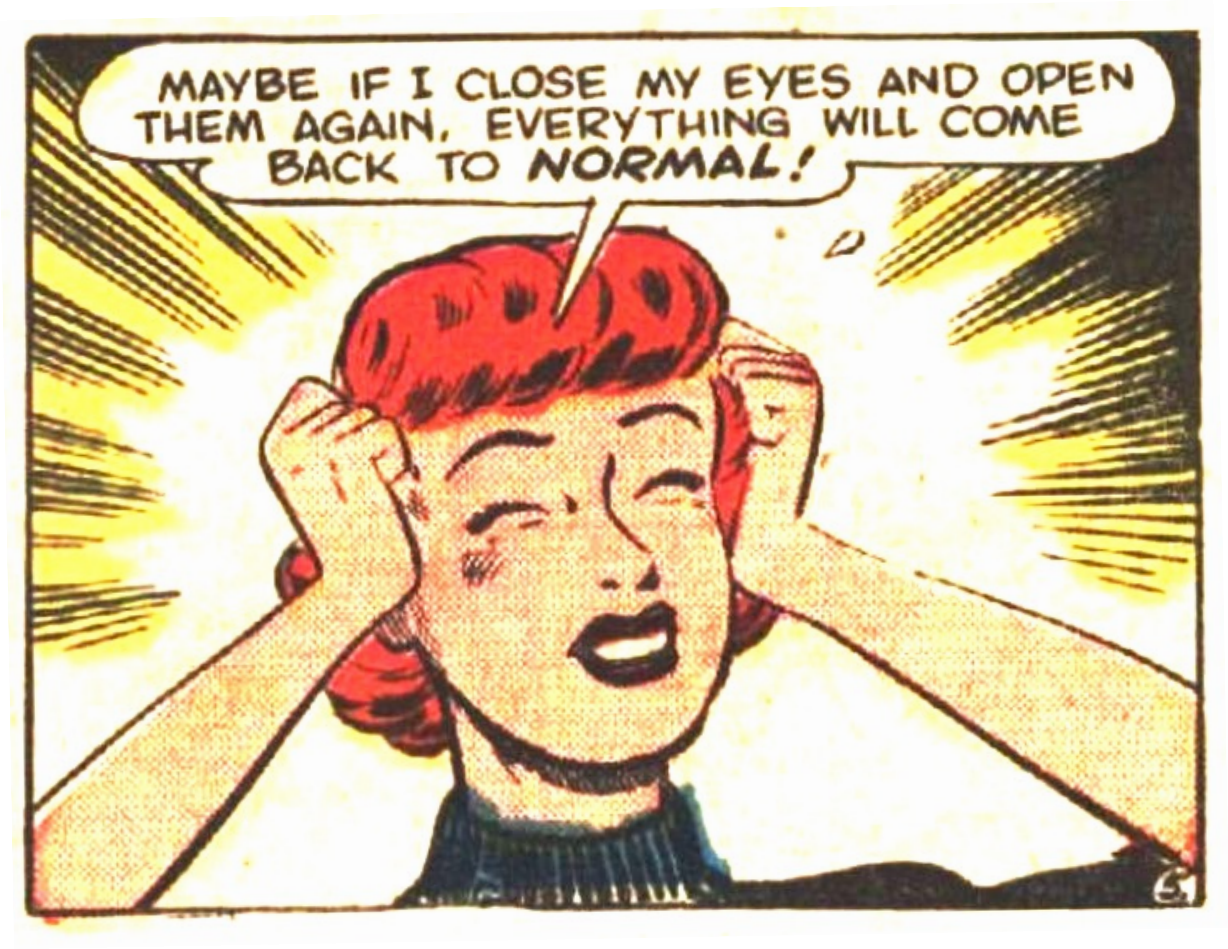


Source: Navigator365™ Core Oncologists GER

Agenda

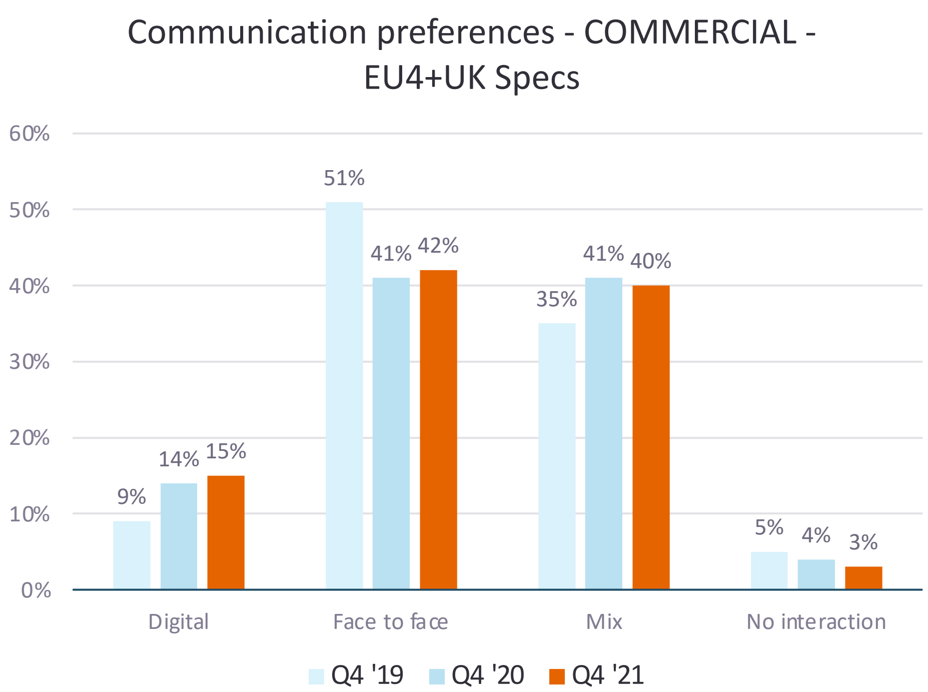
BC AC

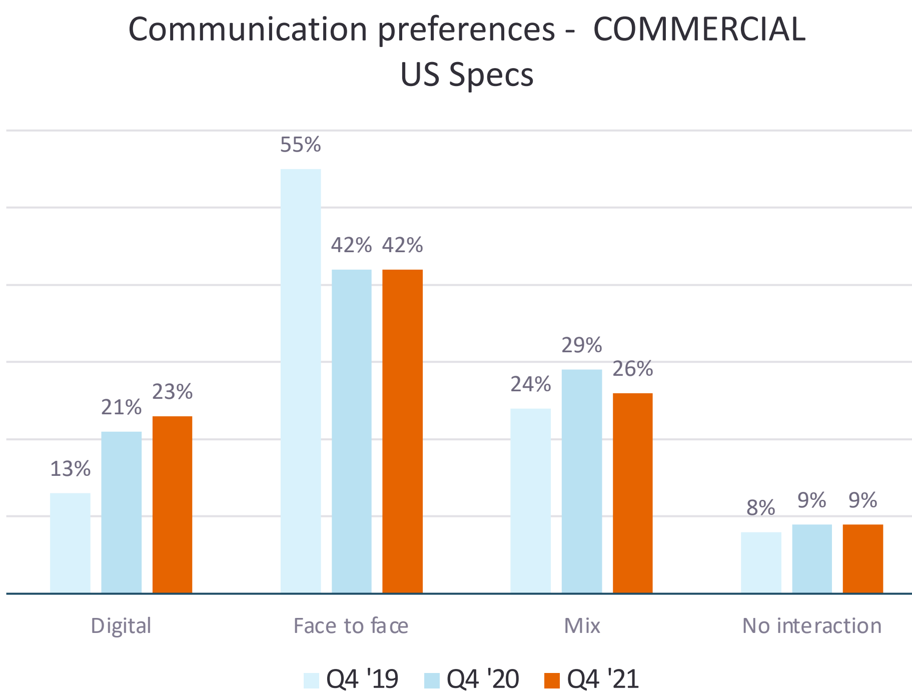
BEFORE CORONA | **AFTER CORONA**


MAYBE IF I CLOSE MY EYES AND OPEN THEM AGAIN, EVERYTHING WILL COME BACK TO NORMAL!

In **Commercial**, a majority (55% EU4+UK ; 49% US) now want at least SOME digital

More segmented approaches OMNICHANNEL are needed going forward



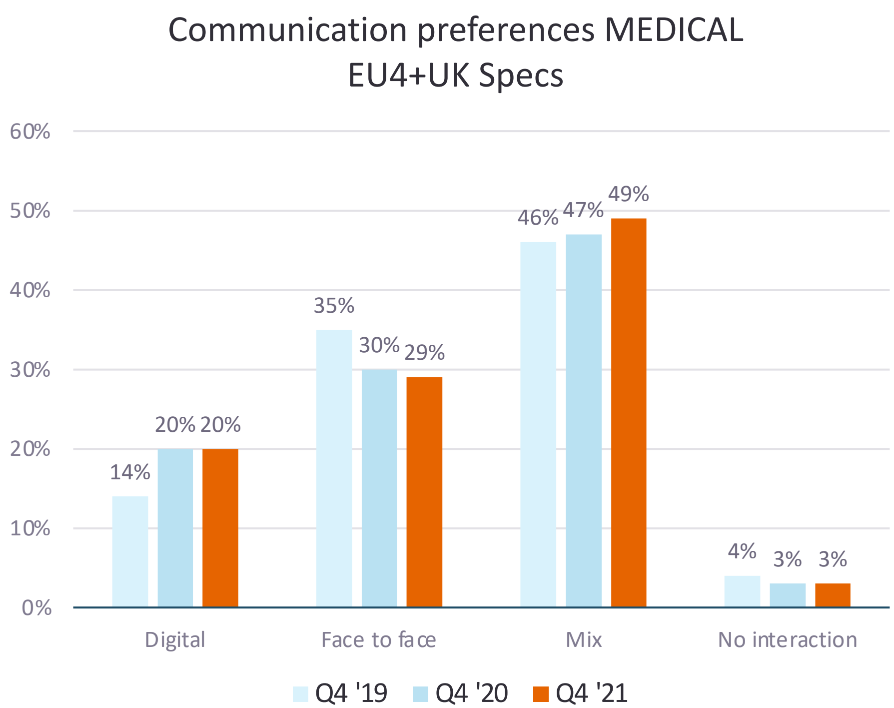


Source: Navigator365™ Core Specialists EU4+UK + US

Q4, N = 5,112 - 2020 Q4, N = 3,779 - 2021 Q4, N = 6,145

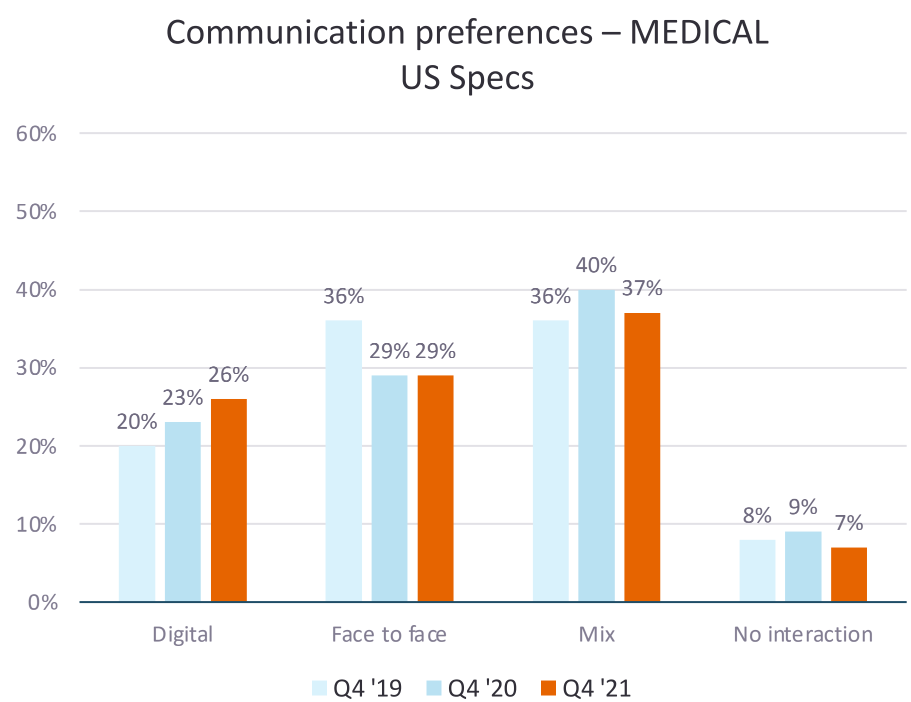
In the **Medical** sphere, 69% of EU4+UK HCPs (63% US) now want at least SOME digital

REPEAT: more segmented – OMNICHANNEL - approaches are needed going forward



Source: Navigator365™ Core Specialists EU4+UK

2019 Q4, N = 4,104 - 2020 Q4, N = 2,780 - 2021 Q4, N = 4,333

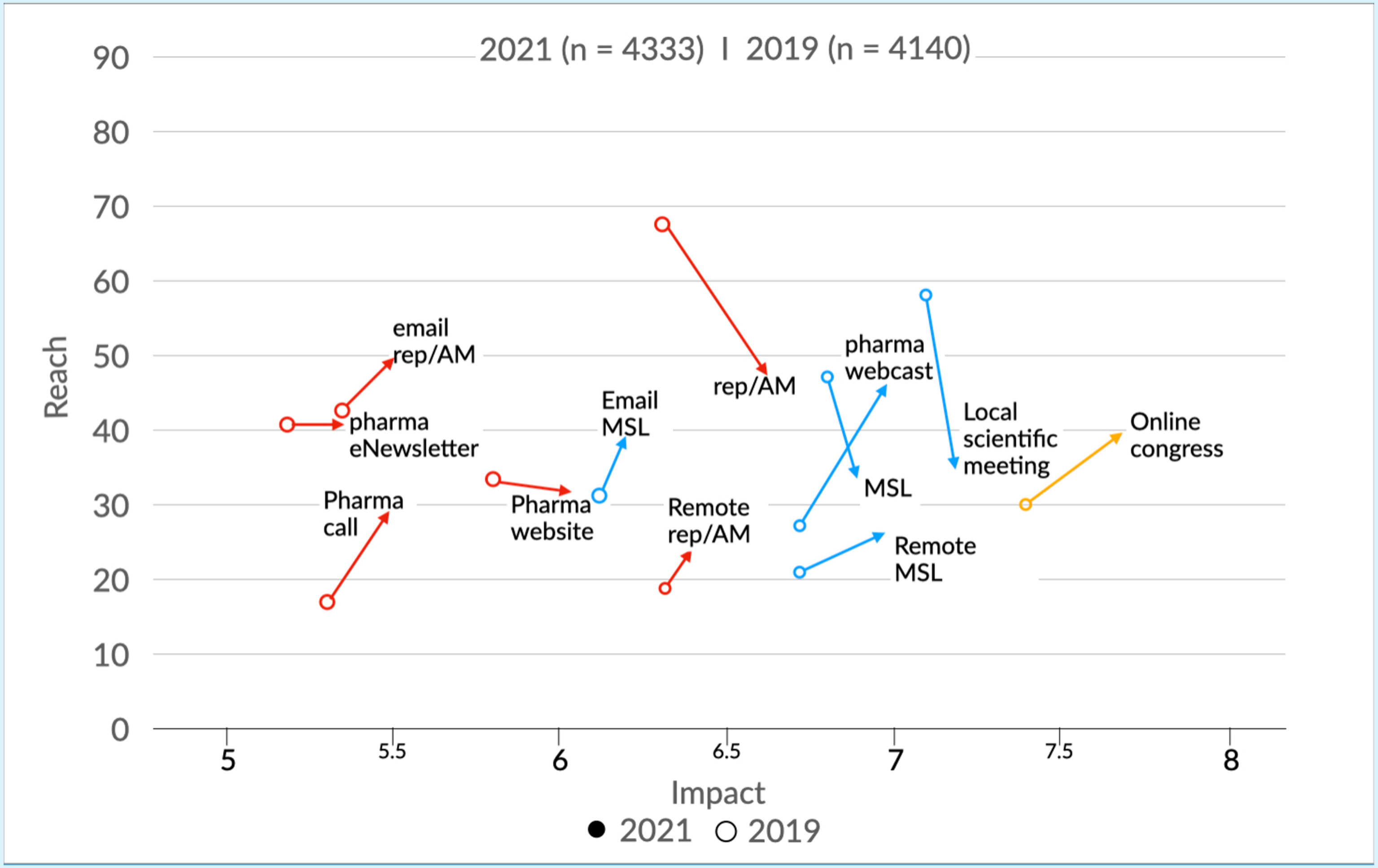


Source: Navigator365™ Core Specialists US

2019 Q4, N = 1008 - 2020 Q4, N = 1000 - 2021 Q4, N = 1812

Reimagine customer engagement Webinars

Omnichannel is here to stay…Among EU4+UK specialists, reach AND impact of most pharma digital channels increased while impact of F2F is going up too (“Less is more?”)



Source: Navigator365™ Core Specialists EU4+UK

2019 Q4, N = 4,104 - 2021 Q4, N = 4,333

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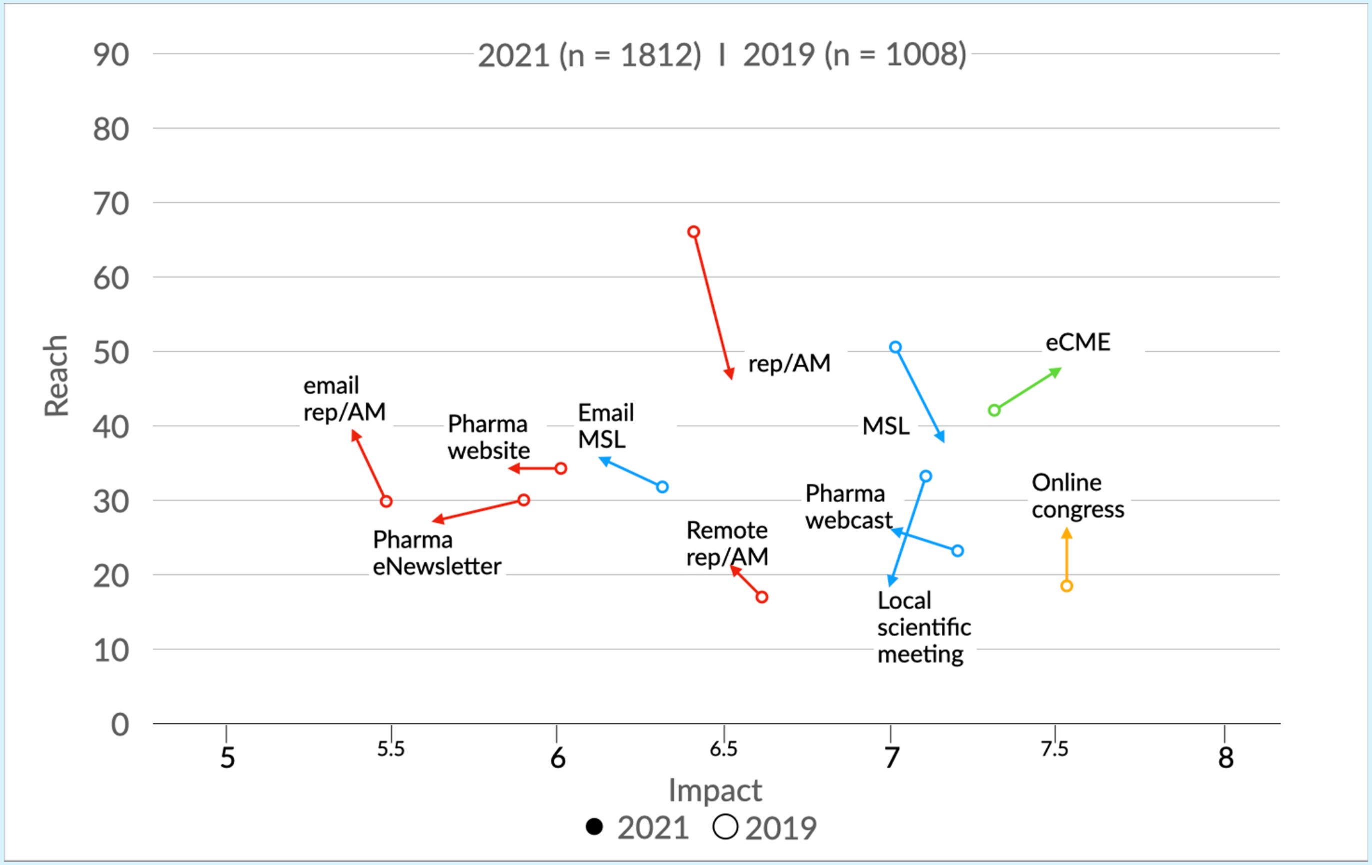
ACROSS HEALTH

Among US specialists, reach BUT NOT impact of most pharma digital channels increased – Impact of F2F not decreasing



“Pump up the volume” without customer focus is a dangerous strategy

READ BLOG POST

Navigator™ 365
Your compass for omnichannel customer engagement in life sciences

Source: Navigator365™ Core Specialists US

2019 Q4, N = 1008 - 2021 Q4, N = 1812

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ACROSS HEALTH

“We are evolving into a more focused and innovative biopharma company, and evolving the way we engage with healthcare professionals in an increasingly digital world. Now, physicians can have access to information about medicines through a digital route rather than through field forces, necessarily. If there is a disruption and it helps, we don’t want to be the ones it will happen to. We want to be the ones who will do it.”

Albert Bourla, CEO Pfizer

“Pharma companies must take the time to align our strategies for adopting technology to the needs of our business, address the cultural issues that prevent us from harnessing the full power of digital tech in our workforce and workplace, and **avoid chasing the next shiny object**. As an industry, we need to have the courage and preparedness to abandon our old ways and begin building a fortified foundation of strategic digitization.”

Paul Hudson, CEO Sanofi

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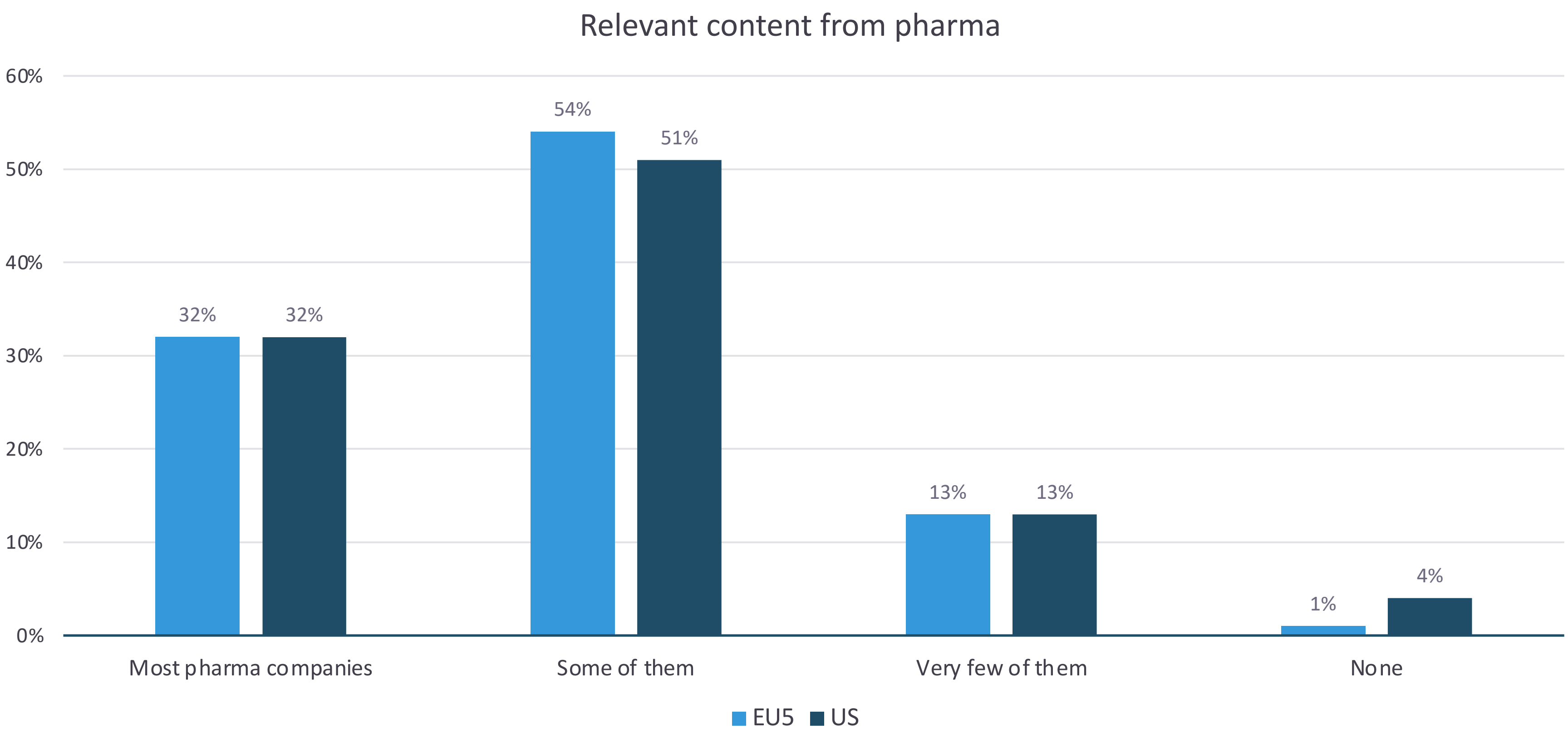
ACROSS HEALTH

The competitive landscape

Despite the pandemic, little change has been observed in content relevance from pharma - > 50% of specialists still identifies "some" companies as offering relevant content to them

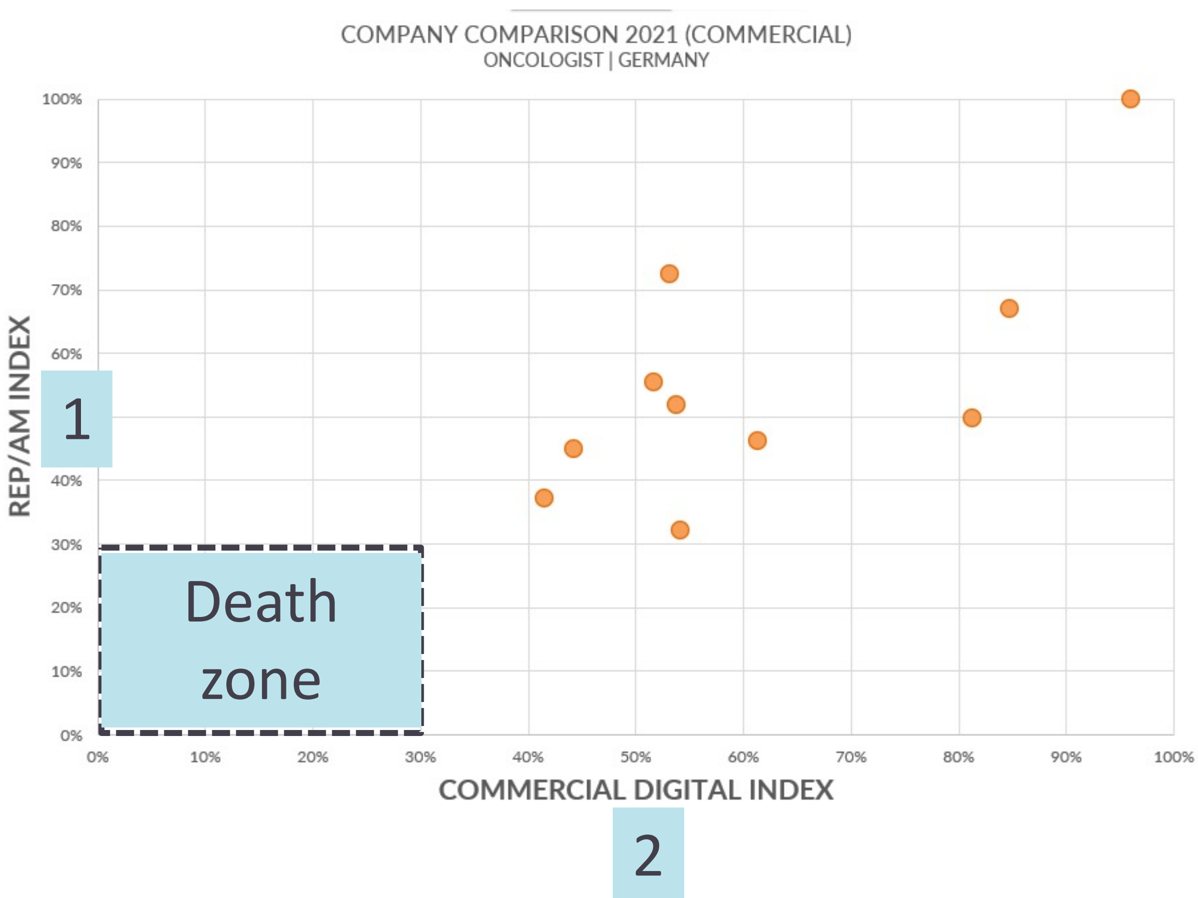


Source: Navigator365™ Core Specialists

EU4+UK 2021 Q4, N = 4,333 - US 2021 Q4, N = 1812

Omnichannel progress tracked via the offline/online index

Methodology



Source: Navigator365™ Core BENCHMARK

1 ***Rep index** = average of company scores for the rep channel expressed as an index vs the leader (who gets 100%)*

2 ***Commercial digital index** = average of company scores for commercial digital activities expressed as an index vs the leader by channel (100% is max score per channel)*

- *Website*
- *Rep email*
- *Marketing email*
- *Remote rep*
- *Rep with tablet*

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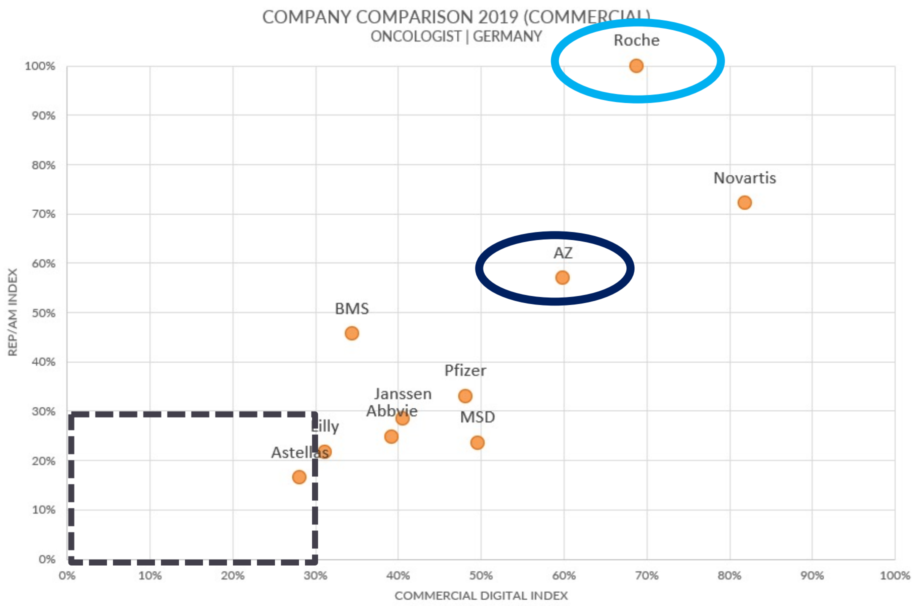
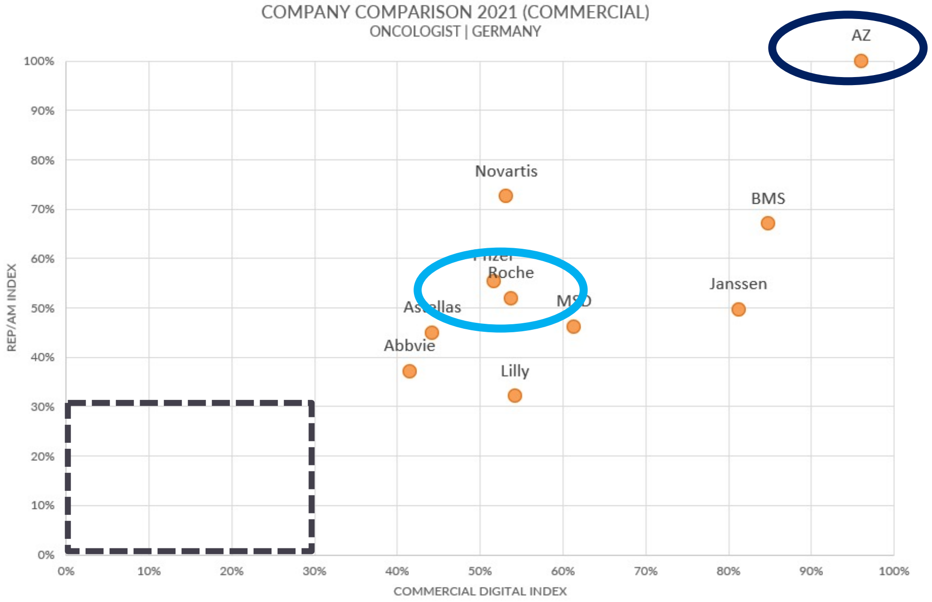
ACROSS HEALTH

Two years of pandemic have already resulted in significant shifts in the competitor landscape – Oncology Commercial, Germany

Omnichannel benchmark of leading Onco companies in Germany COMMERCIAL



Q4 2019



Q4 2021

AND the average MCQ of the digital promo channels has improved:
From 70% of rep impact (2019) to 90% of rep impact (2021)

Source: Navigator365™ Core BENCHMARK

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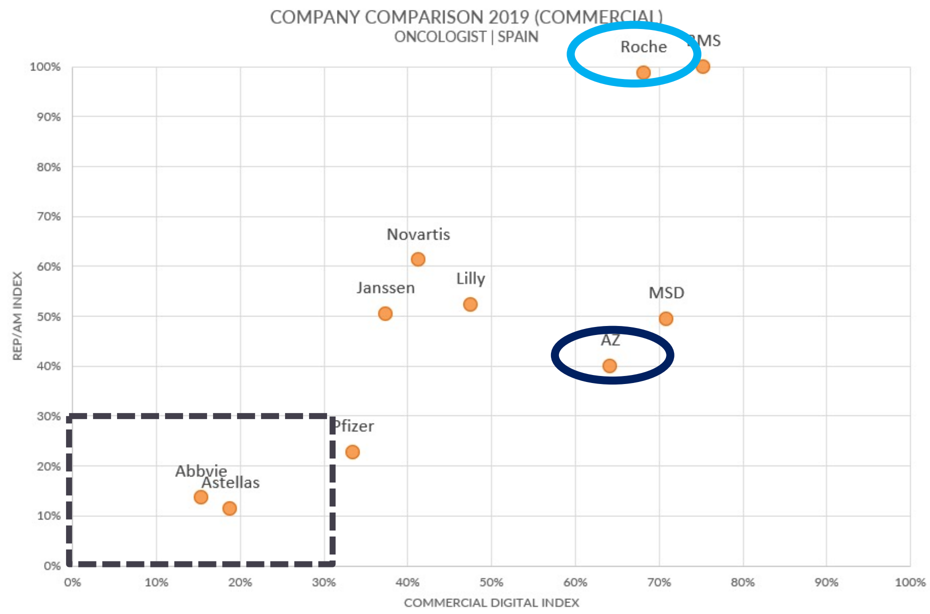
German Oncologists Q4 ‘19 (n = 100) vs Q4 ‘21 (n = 200)

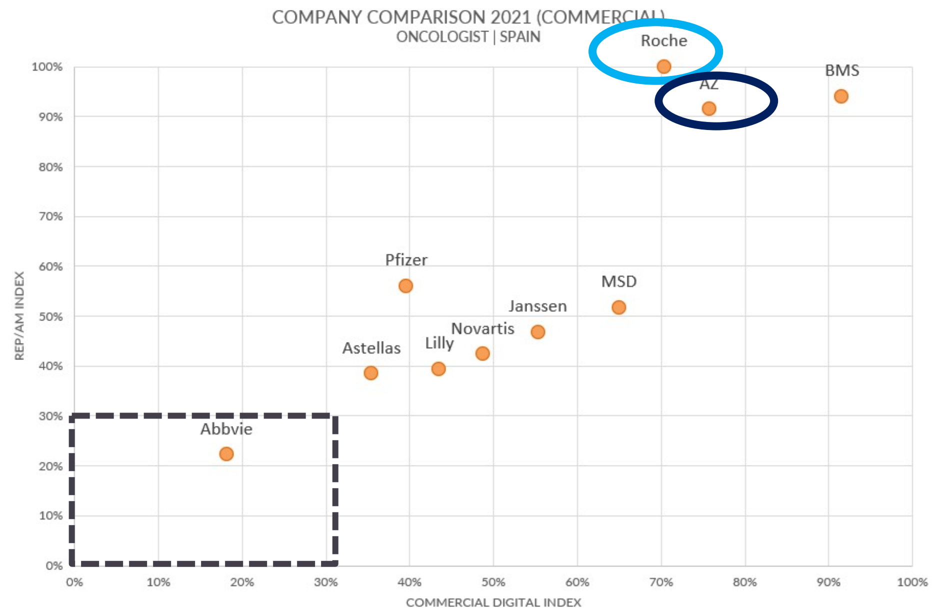
ACROSS HEALTH

The trend is very similar in Spain for AZ – Roche is holding on (and so is BMS)…but will they in 2022 as well?

Omnichannel benchmark of leading Onco players in Spain COMMERCIAL



Q4 2019



Q4 2021

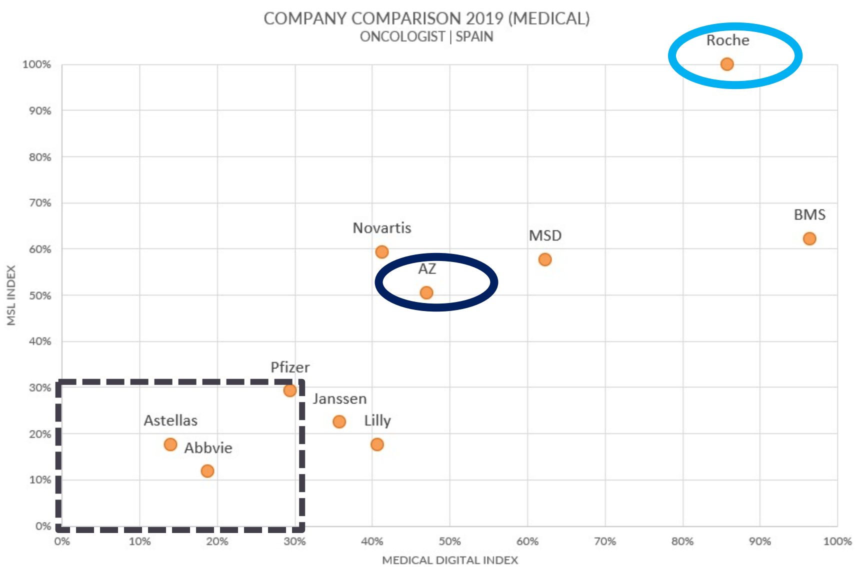
AND the average MCQ of the digital promo channels has improved here too:
From 70% of rep impact (2019) to 100% of rep impact (2021)

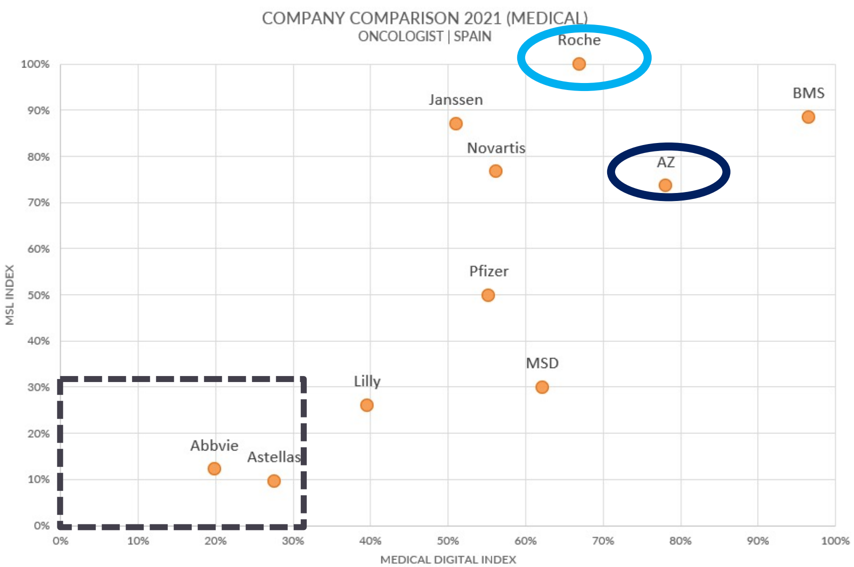
Source: Navigator365™ Core BENCHMARK

German Oncologists Q4 '19 (n = 100) vs Q4 '21 (n = 200)

And how about Medical? Let's stay in Spain…similar picture

Omnichannel benchmark of leading Oncology players in Spain MEDICAL





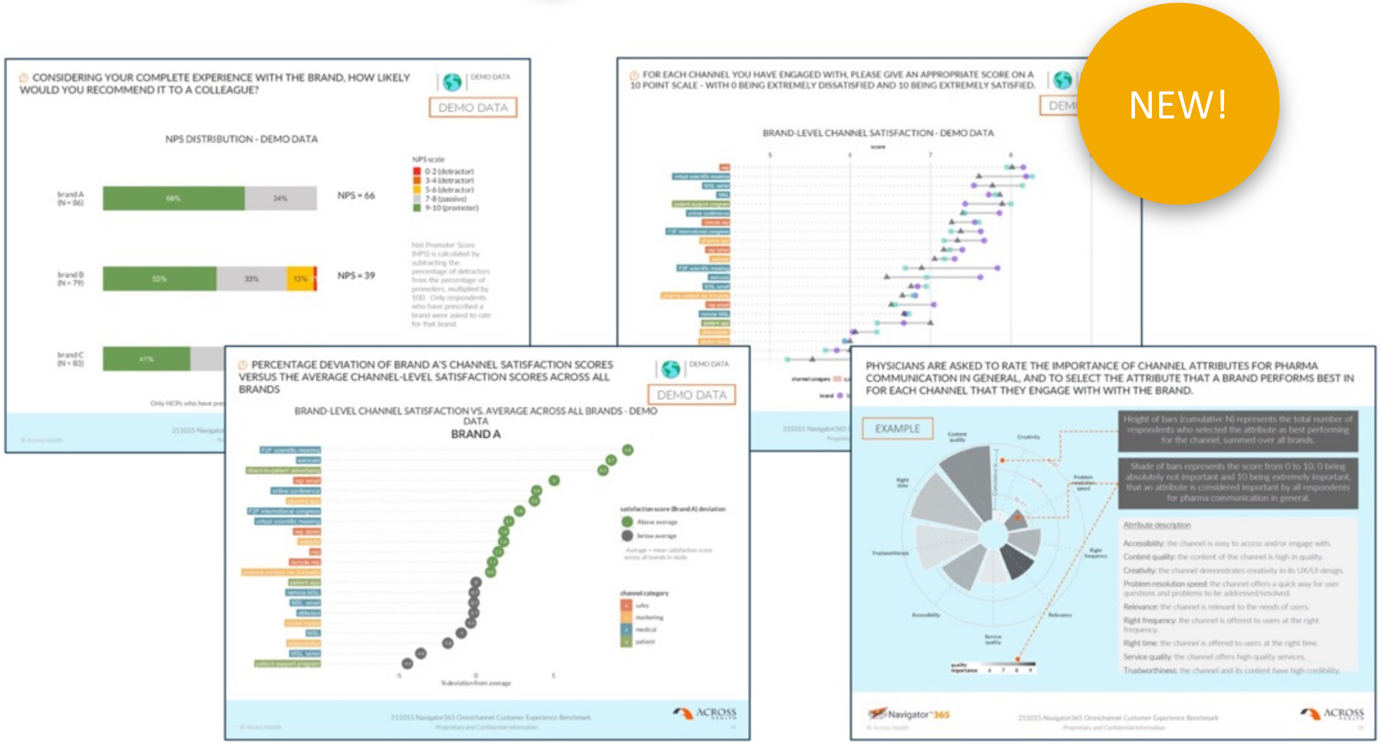
MSL index *= average of company scores for the MSL channel expressed as an index vs the leader (who gets 100%)*
MEDICAL digital index *= average of company scores for medical digital activities expressed*

MSL tablet
MSL email
Remote MSL
Emeded
webcast

Want to know how well you are doing vs your competitors AT THE BRAND LEVEL?

Navigator365 Core 365 Cx Benchmark offers an opportunity to run a brand-level analysis for all your key channels and attributes

Navigator365™ Cx Benchmark



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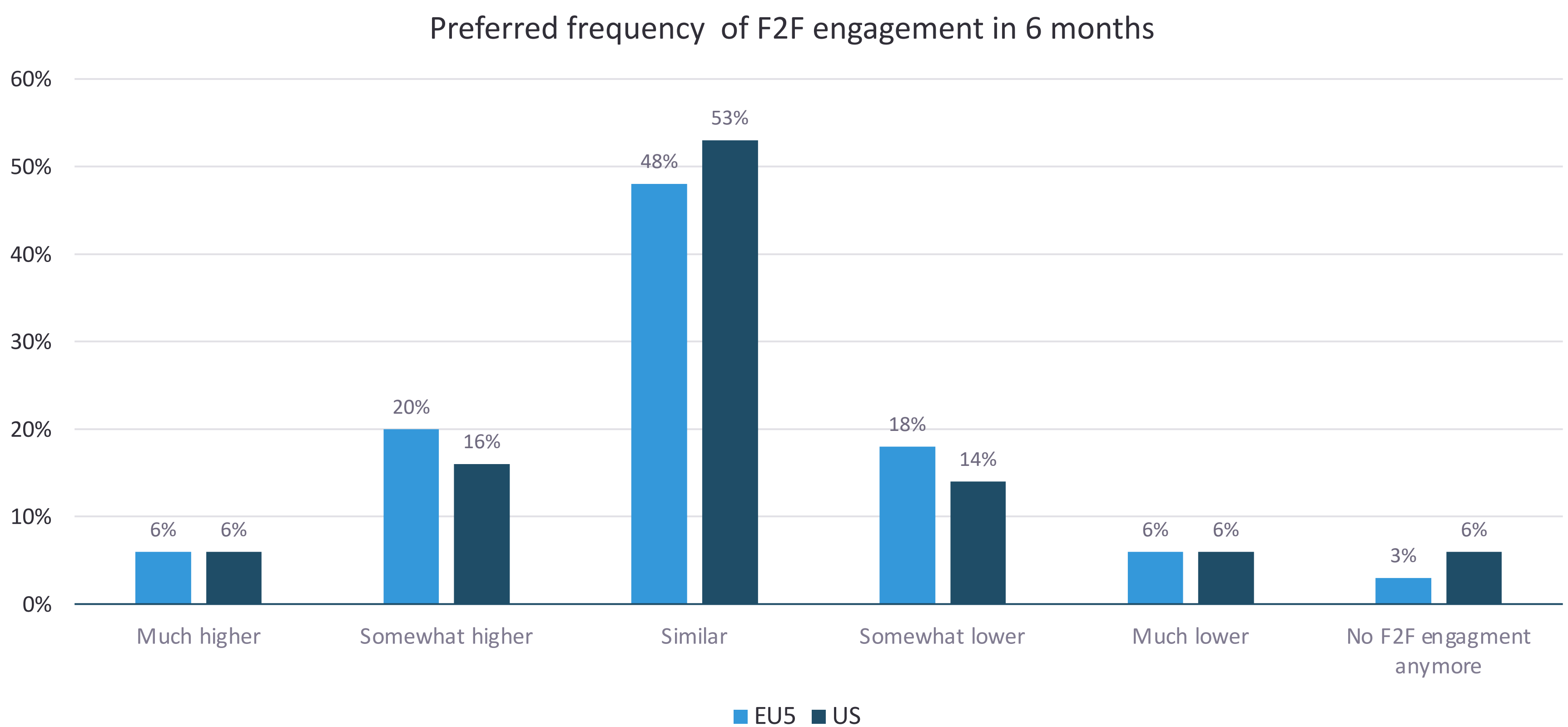
4	Reimagine the future

Most specialists are happy with current (reduced) F2F rep volume at this stage

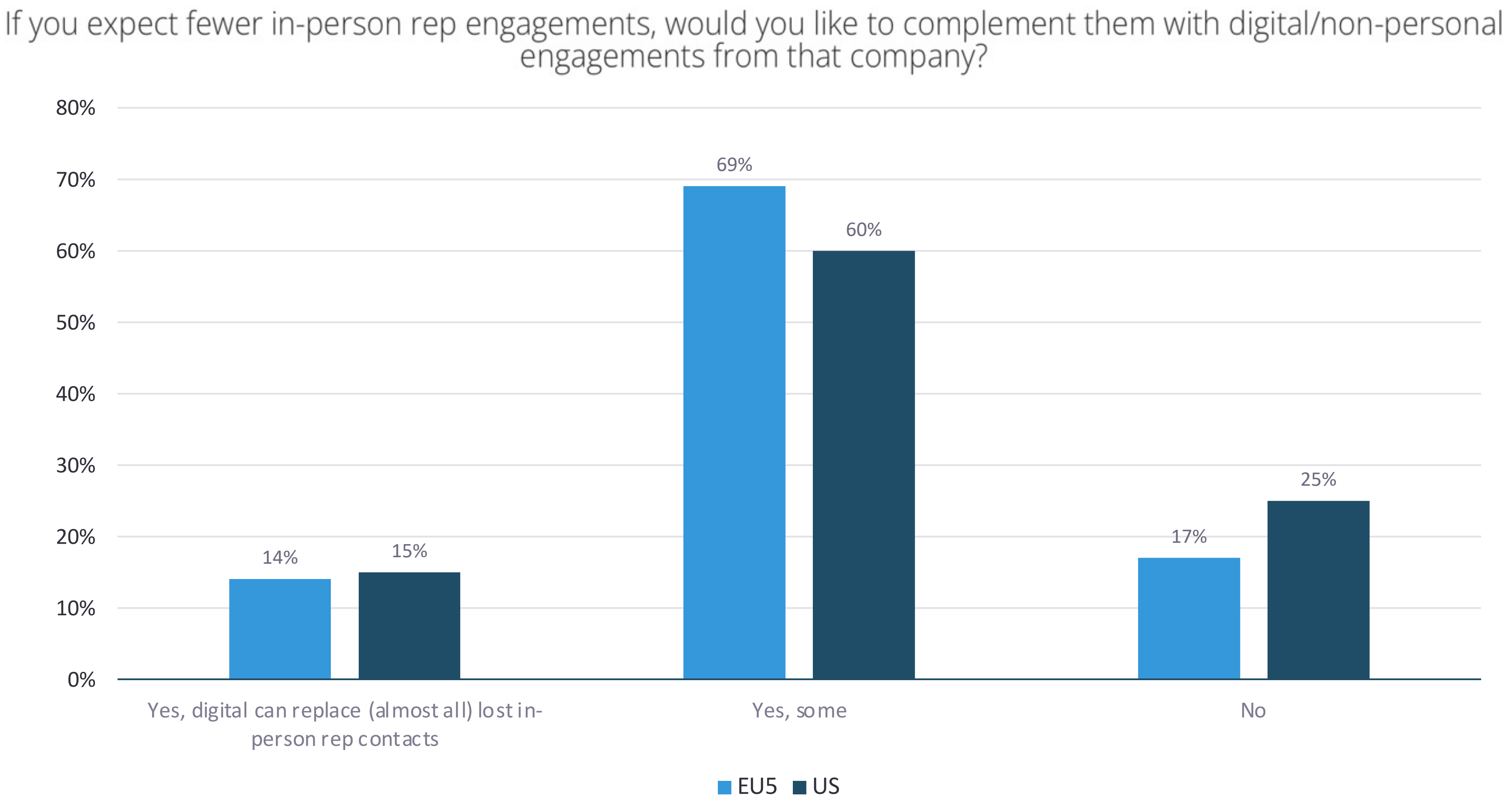
Looking to 6 months from now, how would you like to engage with sales reps in terms of face-to-face visits?



Source: Navigator365™ Core Specialists

Q4 '21, N = 3,829 (EU4+UK); N = 1,611 (US)

And are happy (83% EU4+UK; 75% US) with some digital compensation for this



% among HCPs who did not select "No changes" in previous question

Source: Navigator365™ Core Specialists

EU4+UK + US Q4 '21, N = 2557 ; N = 999

Your predictions for 2022

Results of Customer engagement survey (Jan 21)

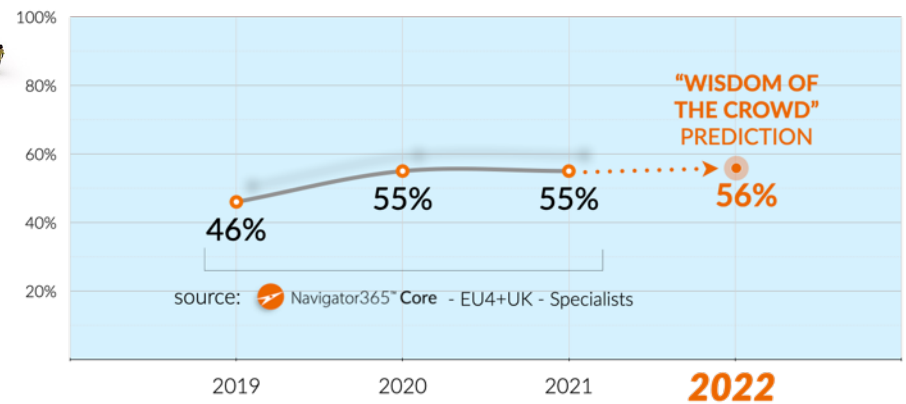
Reimagine customer engagement Webinars

ACROSS HEALTH

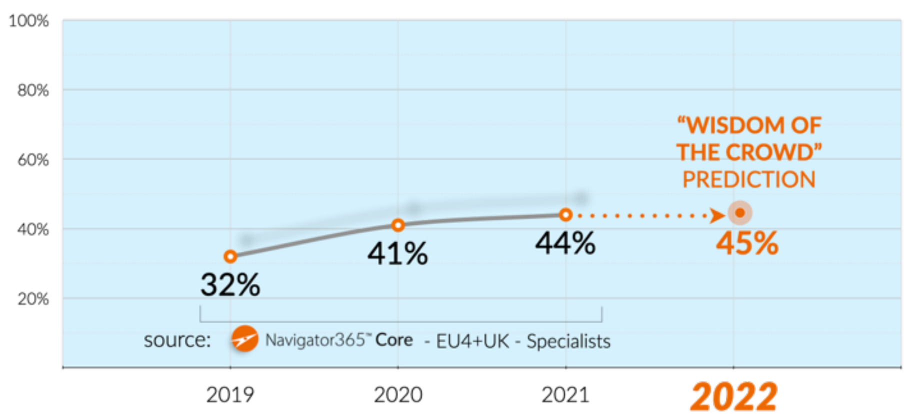
Your prediction for 2022!

The wisdom of crowds

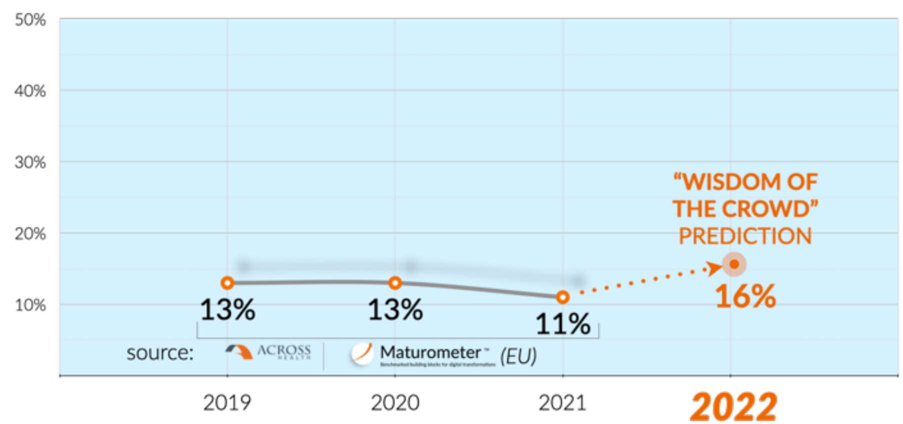
1. HCP PREFERENCE for digital-only+mixed approach (commercial)



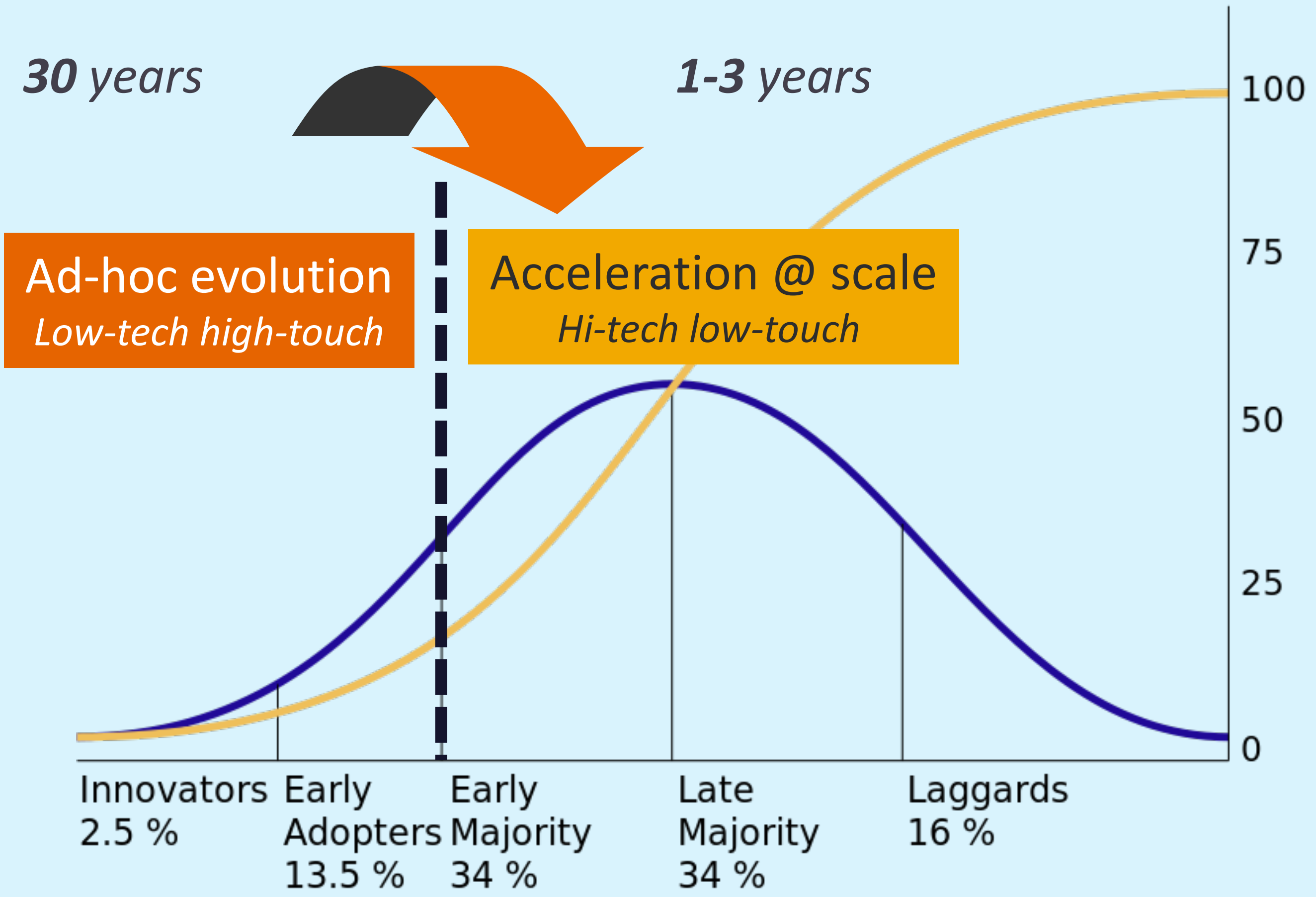
2. HCP SATISFACTION with pharma digital communication



3. PHARMA SATISFACTION with pharma digital offerings



We have reached the tipping point!
What is needed? Transformation @ Scale



Poll

Among HCPs, the pandemic triggered a shift in favour of OC engagement. In the next 5 years, do you think HCPs' preference will:

1. Remain in place as the new equilibrium
2. Further increase in favour of more digital/omnichannel
3. Shift a bit back to the ‘old normal’

Please give us your feedback!

Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!

Navigator™ 365

Your compass for omnichannel customer engagement in life sciences

https://www.across.health/navigator365

ACCELERATE & SCALE YOUR OMNICHANNEL JOURNEY WITH OUR INTEGRATED OFFERINGS

INDUSTRY-LEADING OMNICHANNEL EXCELLENCE **PRODUCT PLATFORM**

Highly scalable, end-to-end cloud-based OCE platform **Navigator 365™**

>80%
find Navigator365 **(much) better** than competition

>50
companies use it for OCE insights, planning & tracking

>5,000
biopharma **users** on the Navigator365 platform

>60,000
omnichannel **HCP profiles** across 20+ therapeutic areas and 20+ countries

Core I Cx Benchmark I Powertools I Planner I Tracker

Boost your company's OCE skills through our blended **capability-building offering**

Scala 365™

Game I elearning I workshops

BEST-IN-CLASS OMNICHANNEL EXCELLENCE **SERVICES**

End-to-end strategic OCE services (OCE insights, strategy, execution, impact)

Presence in **Europe, Asia** and **US**

Highly metricized methodology for **Maximizing the Mix** (IQVIA-tracked cases)

Brought to you by **>60** highly experienced omnichannel natives

Seamless access to top-notch medical writing, creative services, PR, access & HEOR offerings *(from Precision Value & Health, our parent company)*

VOICE OF THE CUSTOMER

23% annual revenue growth rate (CAGR) since 2007

Serving **18** of the top 20 biopharma companies - and over **40 companies** in total

NPS = 74

Want to know more? Then simply sign up for the remaining 3 webinars

ACROSS HEALTH

Reimagine customer engagement

The webinar series

2022

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Question time!