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Reimagine customer engagement

engagement  
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ACROSS HEALTH

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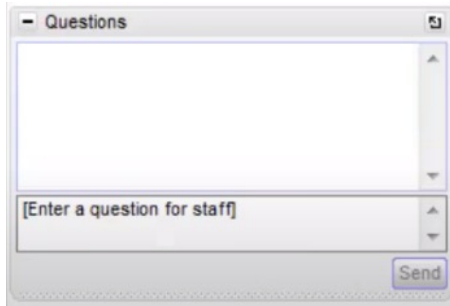
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Post-COVID Omnichannel HCP engagement  
in Romania - key trends

Webinar – MONDAY 11/07

# Ground rules

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



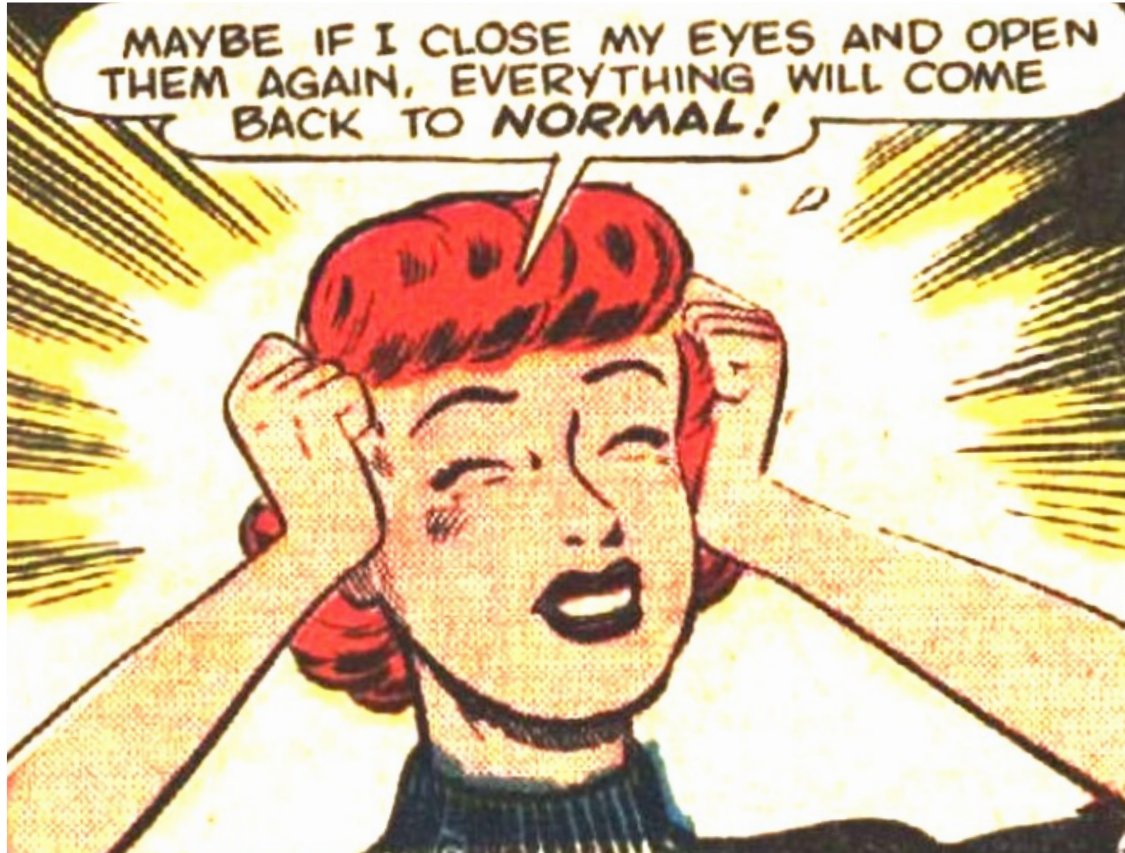
- **Please give us your feedback!**
  - Right after the webinar a short satisfaction survey will be launched. We would love to know your opinion!
- The webinar will be **recorded** and made available after the session. We will send you an email with the details



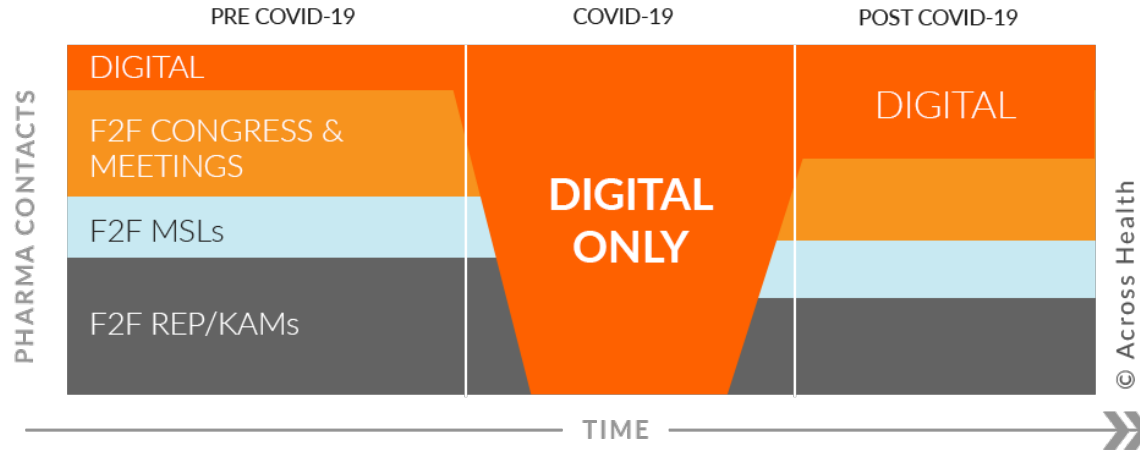
**BC ⚡ AC**

**BEFORE  
CORONA**

**AFTER  
CORONA**

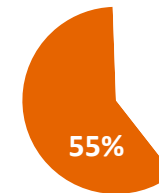


# Biopharma needs to re-think the GTM model; COVID-19 has significantly disrupted the traditional business model

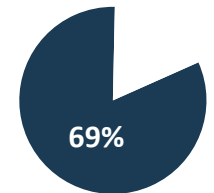


Post-COVID, HCPs want and expect to receive pharma content via digital/mix of channels<sup>1</sup>

OC Promo preference



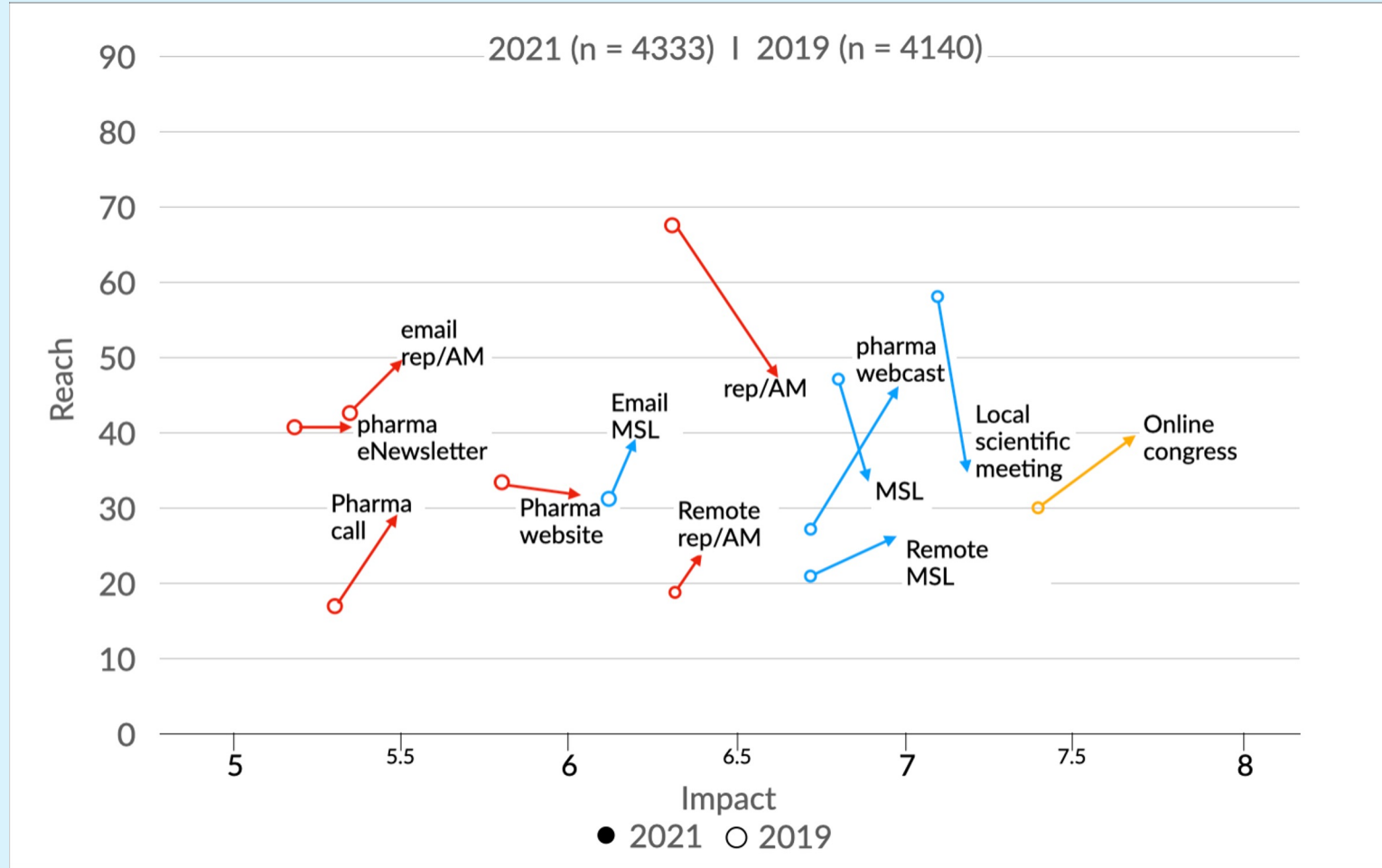
OC Education preference



Digital adoption is set to further accelerate post-COVID-19. This represents an **important opportunity** for pharma companies to deliver against HCPs' strong demand for omnichannel engagement

Source: Across Health Navigator™365 (Q4' 21 EU4 + UK specialists – N= 6145)

# Omnichannel is here to stay...Among EU4+UK specialists, reach AND impact of most pharma digital channels increased while impact of F2F is not going down



Source: Navigator365™ Core Specialists EU4+UK

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

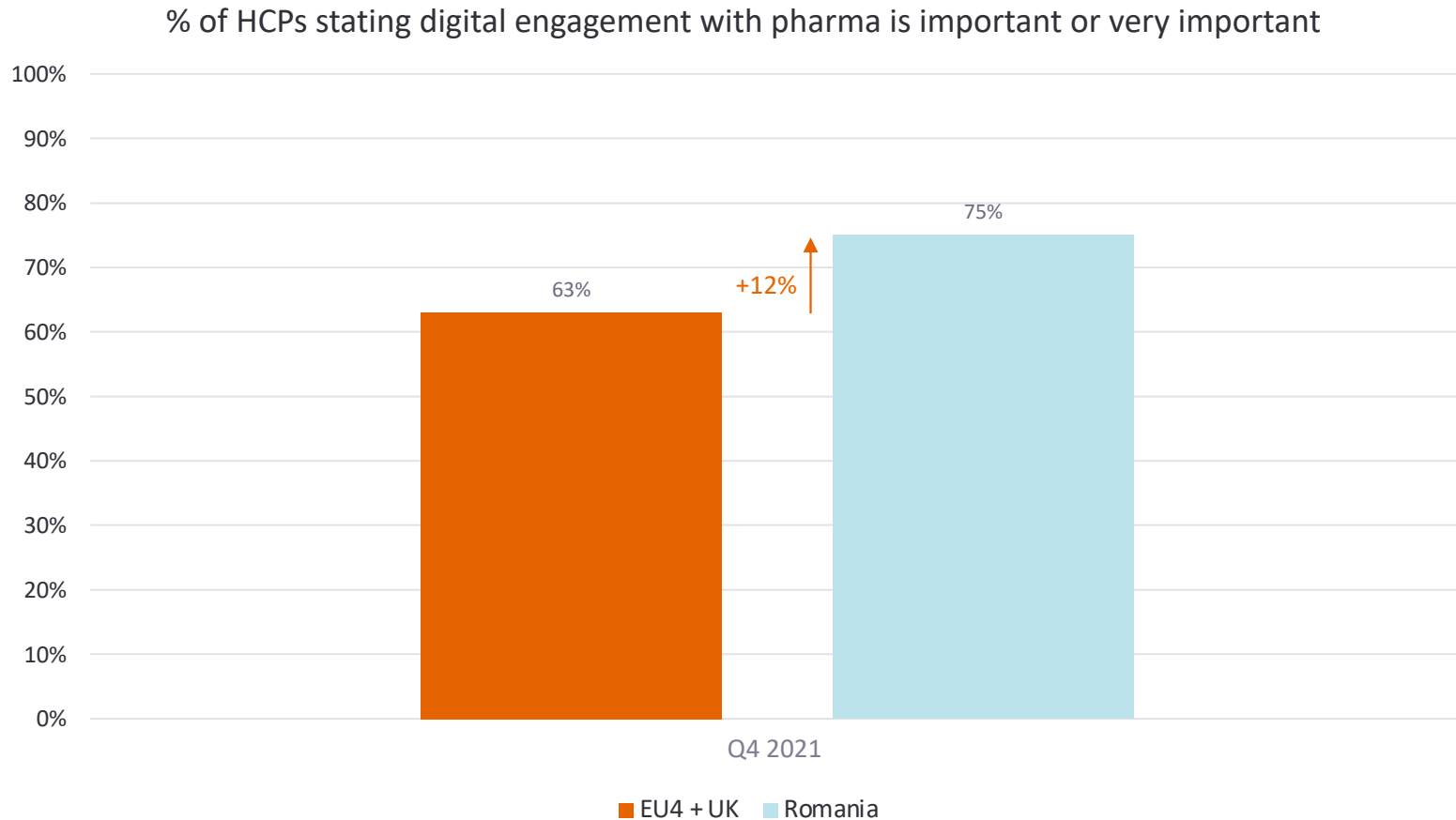
# Poll

Did we observe the same shift in Romania?

1. YES, even more outspoken vs EU5
2. YES, about the same shift vs EU5
3. YES, but less outspoken vs EU5
4. NO, HCP engagement preference didn't change



# 3 out of 4 Romanian specialists believe that digital engagements with pharma are (very) important



Source:  Navigator365™ Core Specialists EU4+UK + Romania

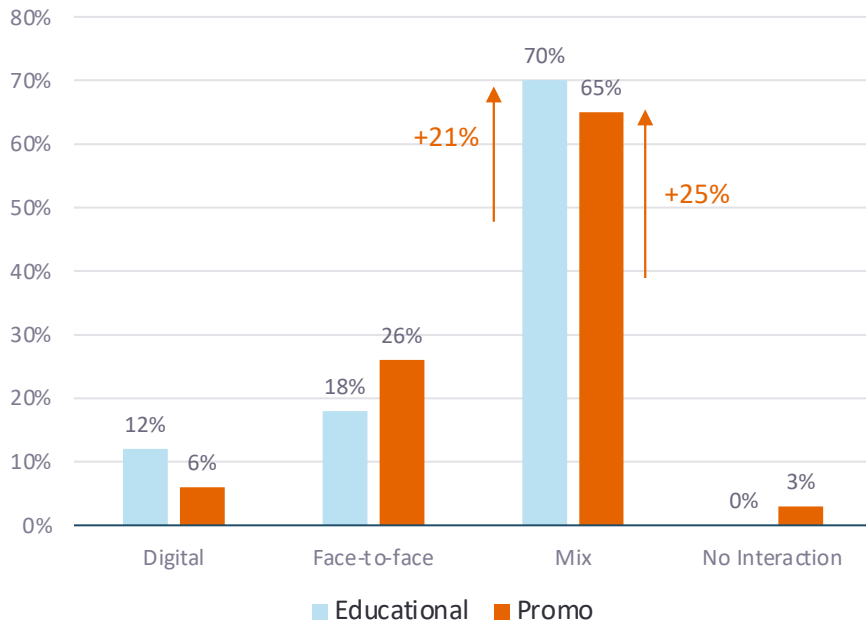
2021 Q4: EU4 + UK, n = 3.098 - Romania, n = 267



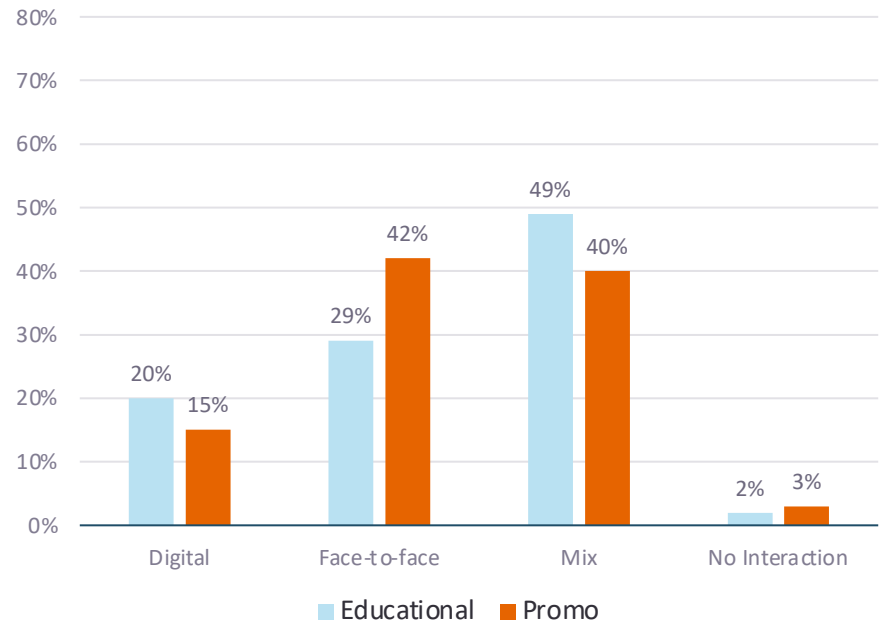
# Large majority of Romanian specialists are “Omnichannel” HCPs

This OC preference is considerably higher than that of EU4 + UK specialists

### Communication preferences - Romanian Specs



### Communication preferences - EU4+UK Specs



Source:  Navigator365™ Core Specialists EU4+UK + Romania

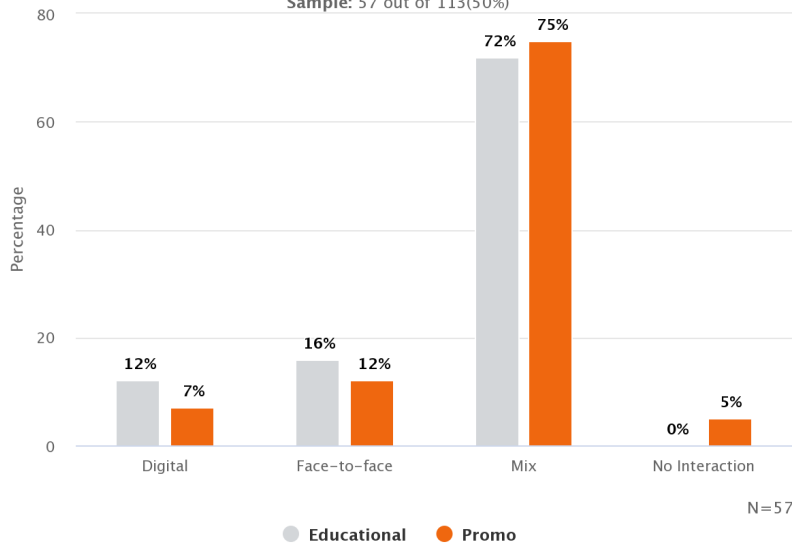
2021 Q4: EU4 + UK, n = 2.230 - Romania, n = 267

# Trend towards OC preference is only further going to accelerate!

## Digital natives

### Communication preferences

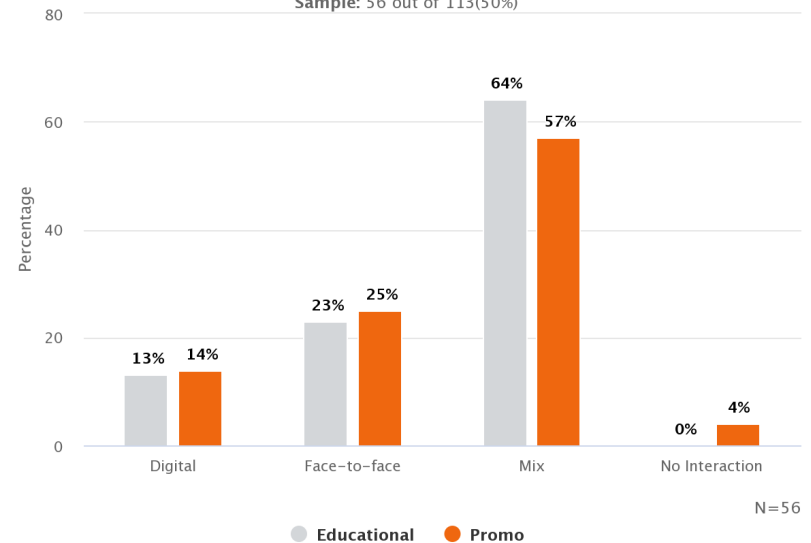
Hematologist, Oncologist, Rheumatologist | Romania  
 Filters: Age: -30, 31-35, 36-40  
 Sample: 57 out of 113 (50%)



## Digital immigrants

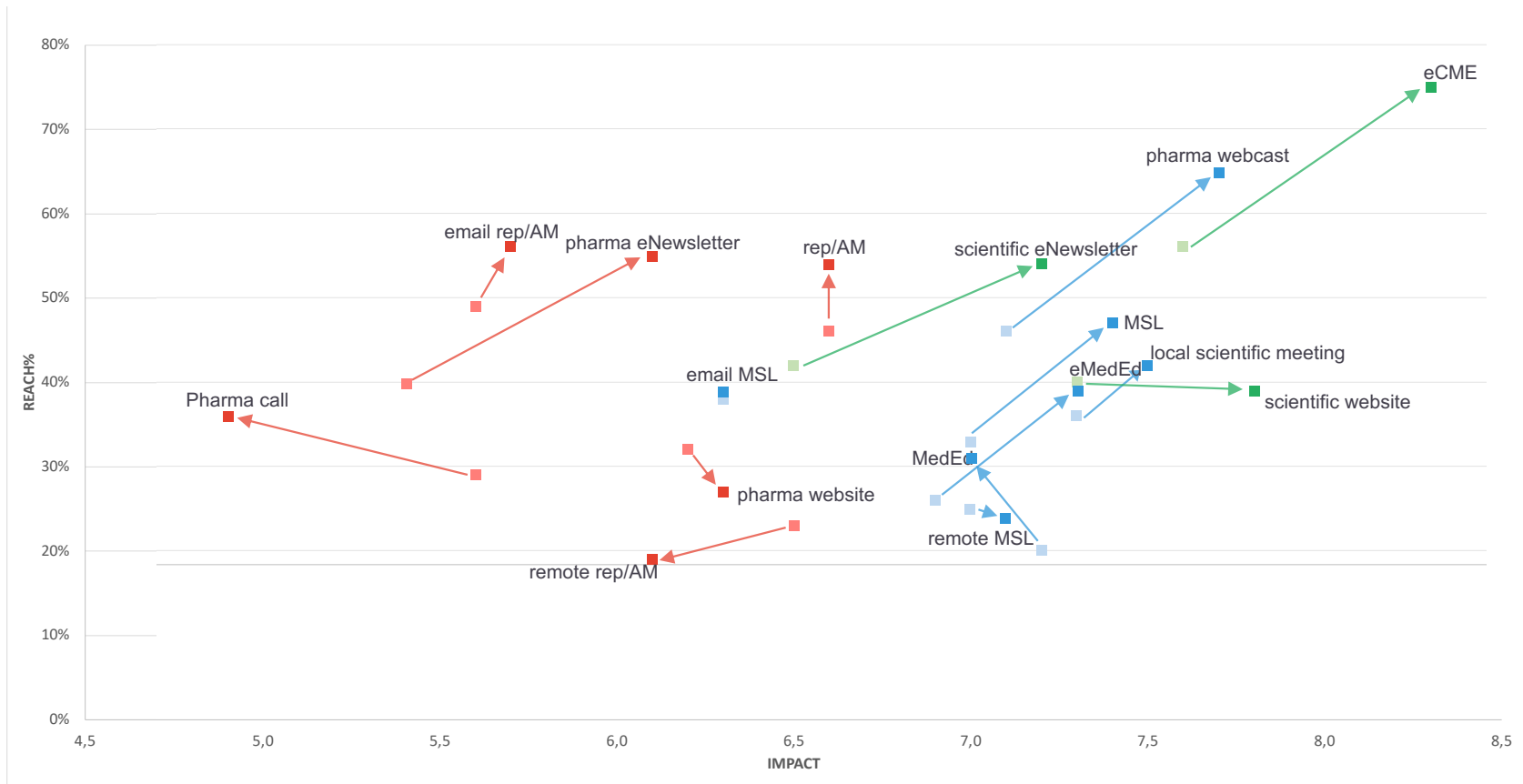
### Communication preferences

Hematologist, Oncologist, Rheumatologist | Romania  
 Filters: Age: 41-50, 51-60, 60+  
 Sample: 56 out of 113 (50%)



Source:  Navigator365™ Core Specialists EU+UK + Romania

# Reach and impact of key digital channels is higher in Romania vs EU5



■ Owned promo – EU4+UK    
 ■ Owned medical – EU4+UK    
 ■ Paid – EU4+UK  
■ Owned promo – ROM    
 ■ Owned medical – ROM    
 ■ Paid – ROM

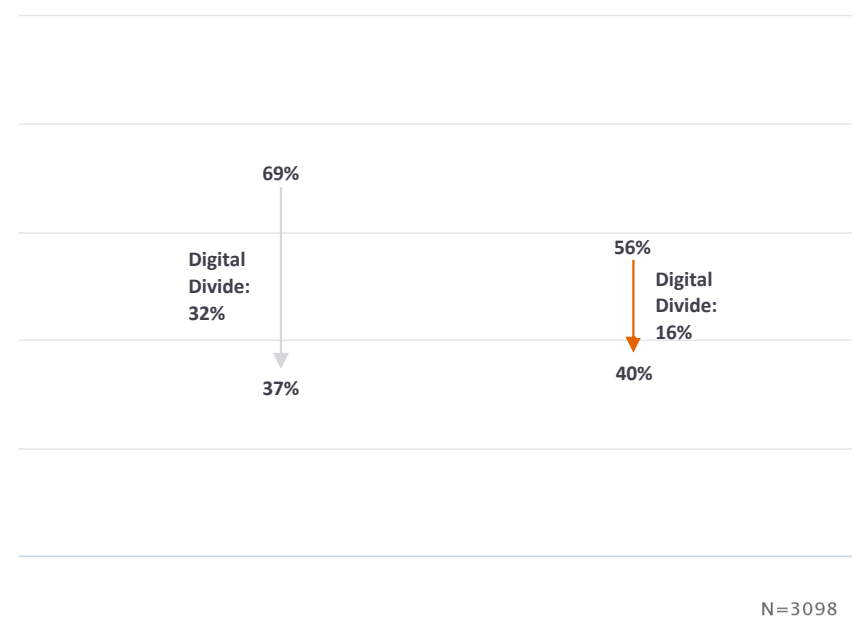
Source: Navigator365™ Core Specialists EU4+UK + Romania

# When looking at both the digital demand and supply, there is a clear **GAP** between what HCPs want (demand) and what pharma actually offers (supply)

Digital divide – Romanian specs



Digital divide – EU4+UK specs

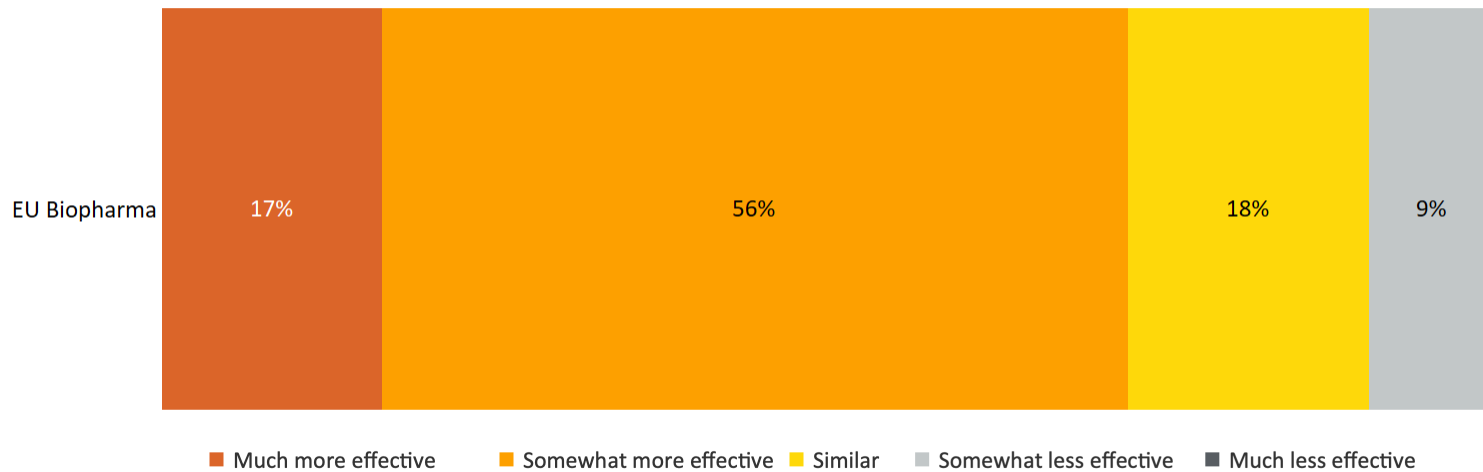


Digital divide = (% preferring digital/mix) - (% epharma reach)

Source:  Navigator365™ Core Specialists EU4+UK + Romania

# Among EU Biopharma there is also a widespread agreement that omnichannel is more effective vs the pre-covid approach

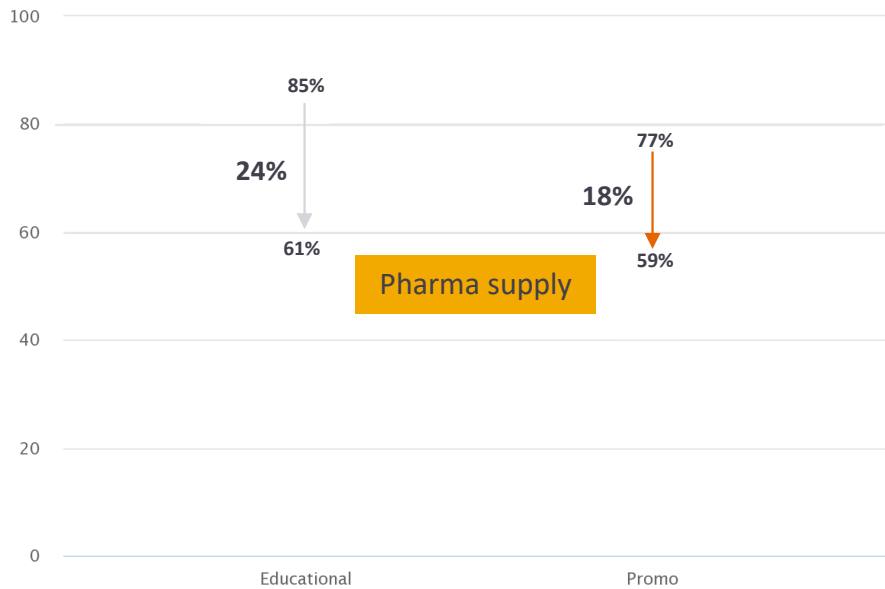
🗨️ HOW EFFECTIVELY DO YOU THINK THE CURRENT OMNICHANNEL ENGAGEMENT MODEL IS VERSUS THE “OLD NORMAL” (IE, THE APPROACH BEFORE 2020/COVID)?



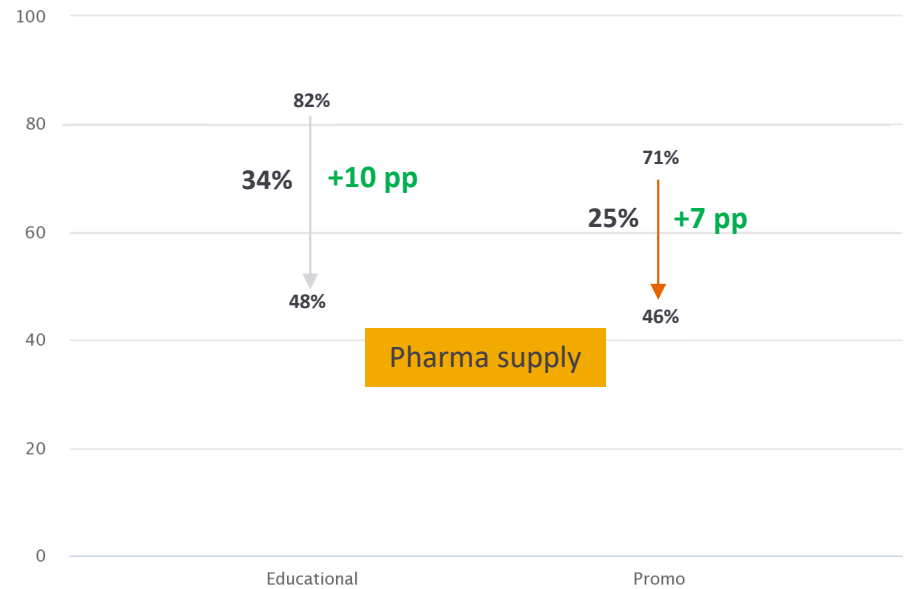
EU Biopharma 2022 n=127

# However, Romanian HCP engagement data suggests that pharma digital supply has decreased again despite stable demand

Digital divide – Romanian specs – 2020



Digital divide – Romanian specs – 2021



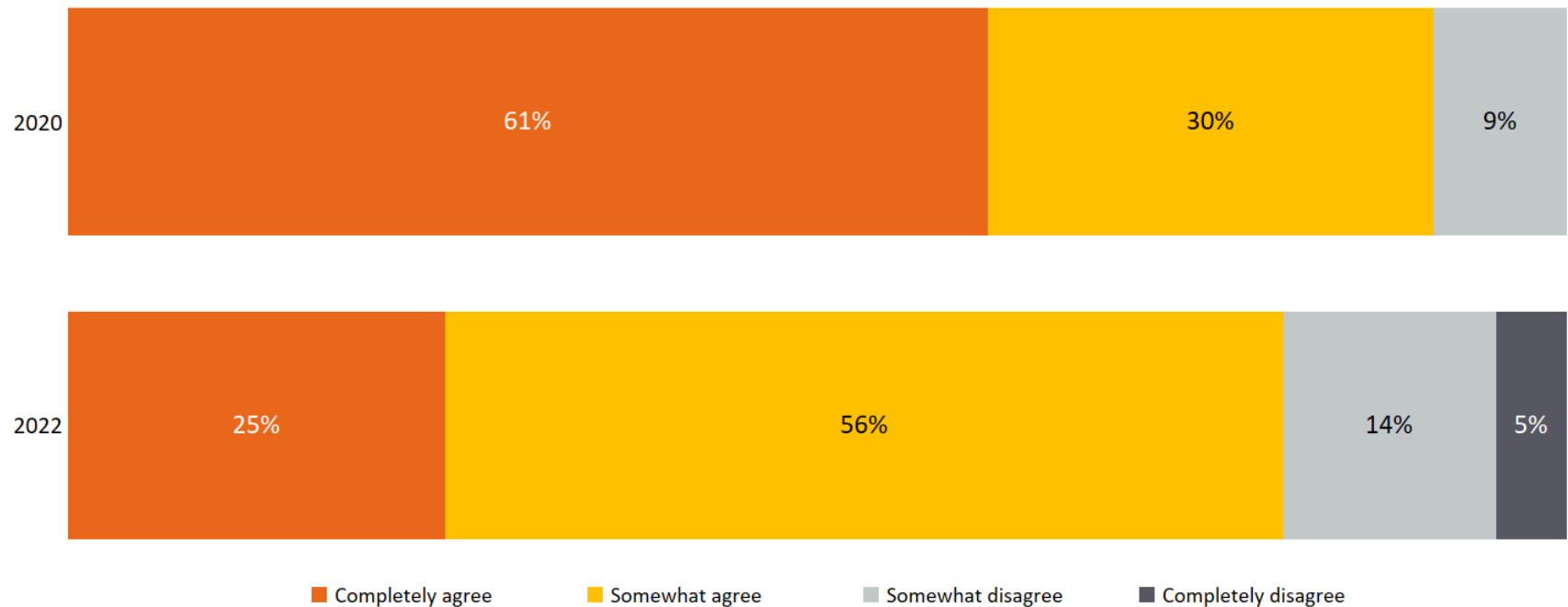
Digital divide = (% preferring digital/mix) - (% epharma reach)

Source:  Navigator365™ Core Specialists EU4+UK + Romania

2021 Q4: EU4 + UK, n = 3.098 - Romania, n = 267

Compared to 2020, the sense of urgency has dropped further in EU, suggesting a more paced approach (or deprioritization?)

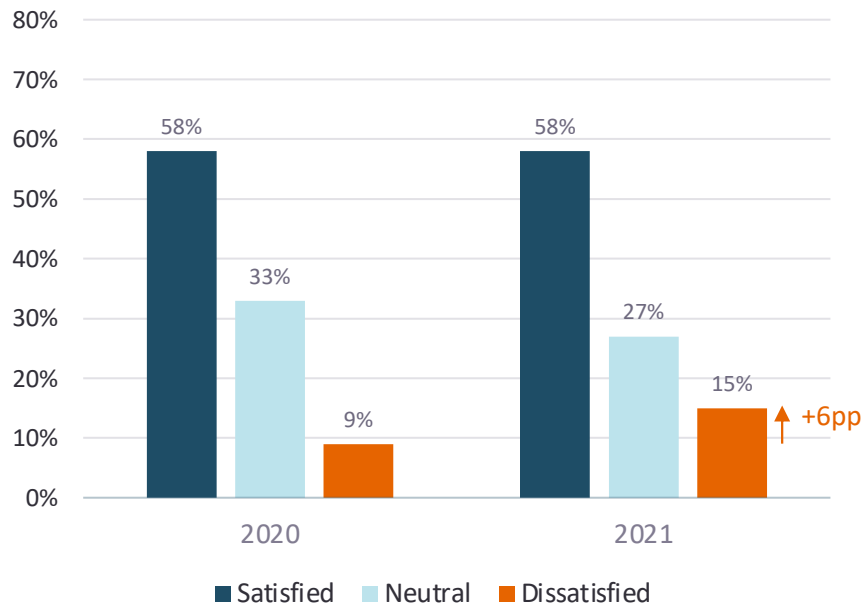
 MY COMPANY HAS A STRONG SENSE OF URGENCY TO CHANGE THE TRADITIONAL CUSTOMER ENGAGEMENT MODEL



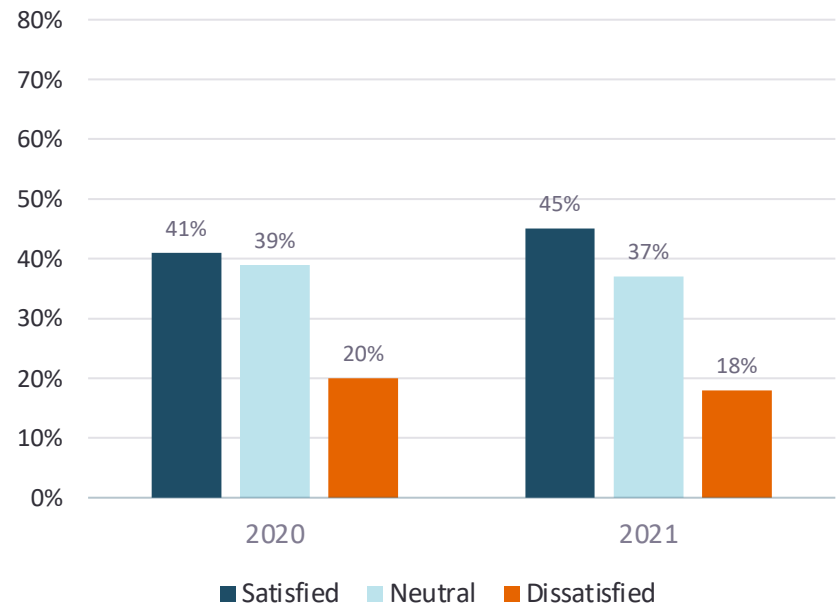
 Maturometer™ 2022

# Sustaining COVID OC engagement levels will be imperative to keep HCP satisfaction levels high

### % of Romanian HCPs satisfied with Pharma's digital offerings



### % of EU4+UK HCPs satisfied with Pharma's digital offerings

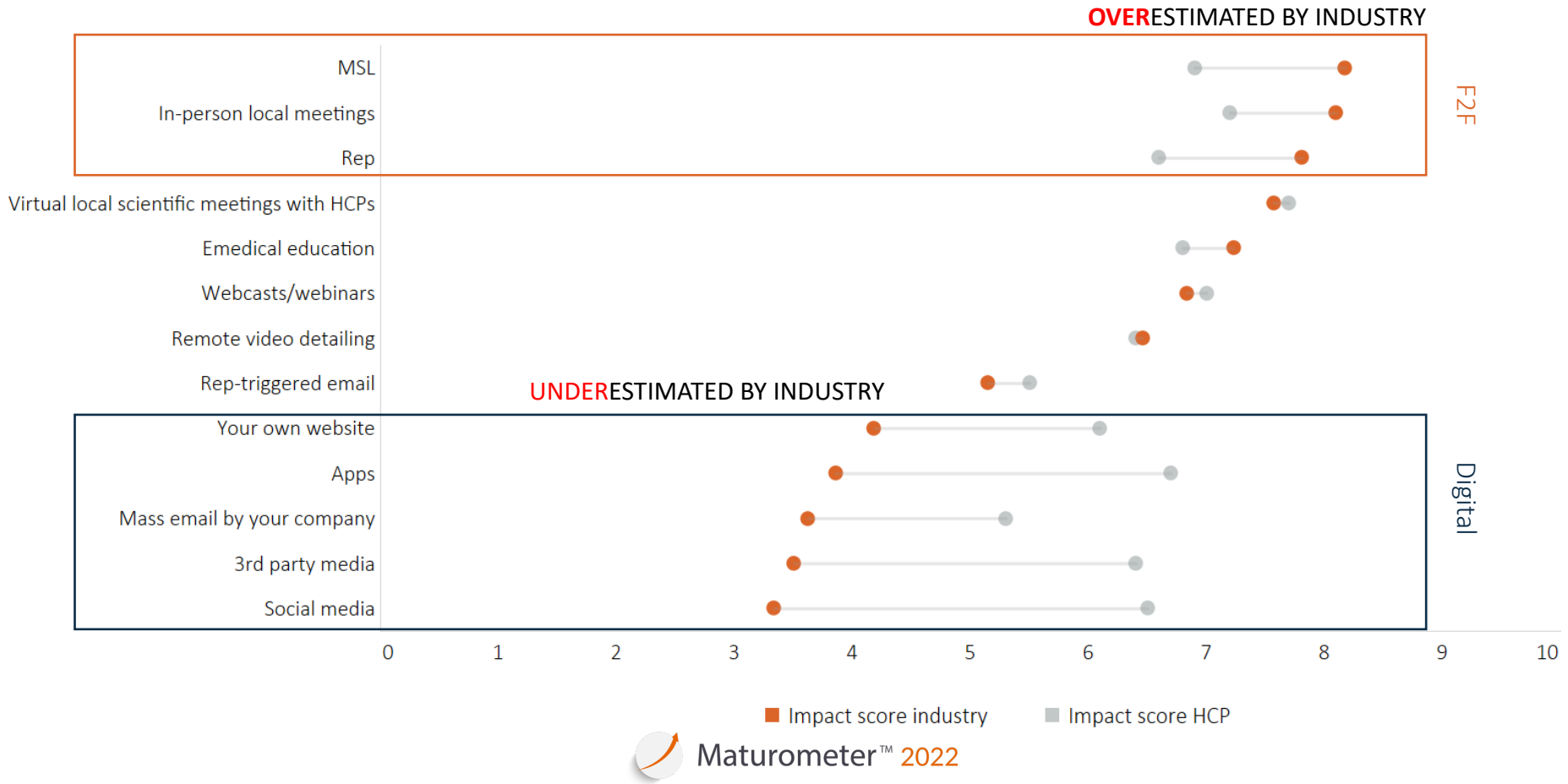


Source:  Navigator365™ Core Specialists EU4+UK + Romania



# Pharma continues to overvalue the impact of F2F channels vs strongly underestimating several digital channels

TO WHAT EXTENT DO THESE CHANNELS IMPACT THE PRESCRIBING BEHAVIOR?



What should we do? The answer can't be just about pumping up the “digital” volume

Quality must also take a much more dominant place in the mix !

## Biggest challenges in 2022

# 1. Balancing quantity and quality (48%)

# 2. Digital fatigue (41%)



**“Doctors disappointed in pharma's digital pandemic efforts”**

**FIERCE**  
Pharma

February 1, 2021

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

(Across Health 2021)

*“Promotional models are obsolete”*

(Iqvia 2021)

# Dynamic segmentation will be key moving forward !

## Archetype analysis for Romanian specialists

### 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

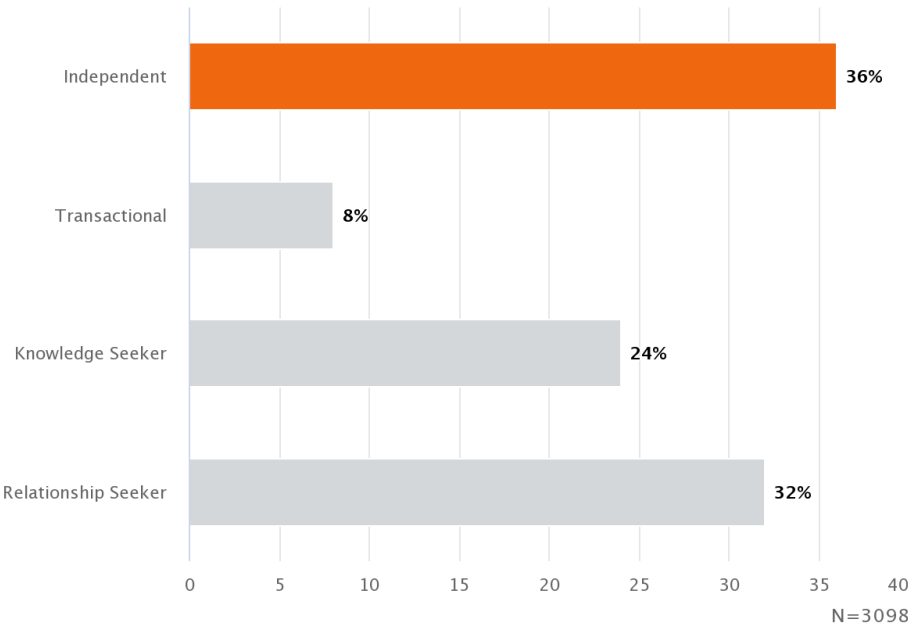
# The Romanian market is mainly dominated by 2 HCPs archetypes

## Relationship seekers and Independents

### Archetype spread



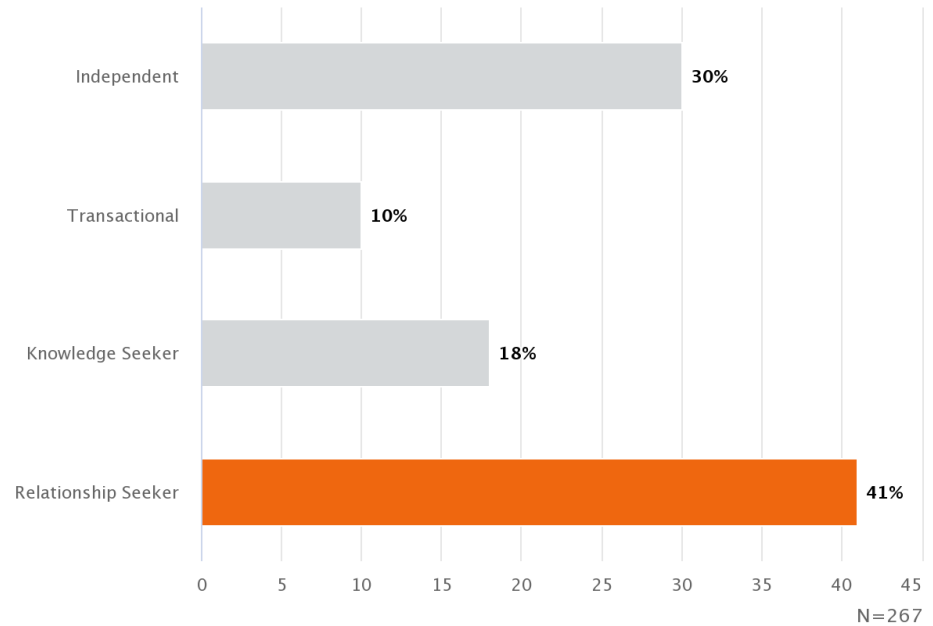
Dermatologist,Gastroenterologist,Hematologist,Neurologist,Oncologist,Rheumatologist | France,Germany,Italy,Spain,United Kingdom | n=3098



### Archetype spread



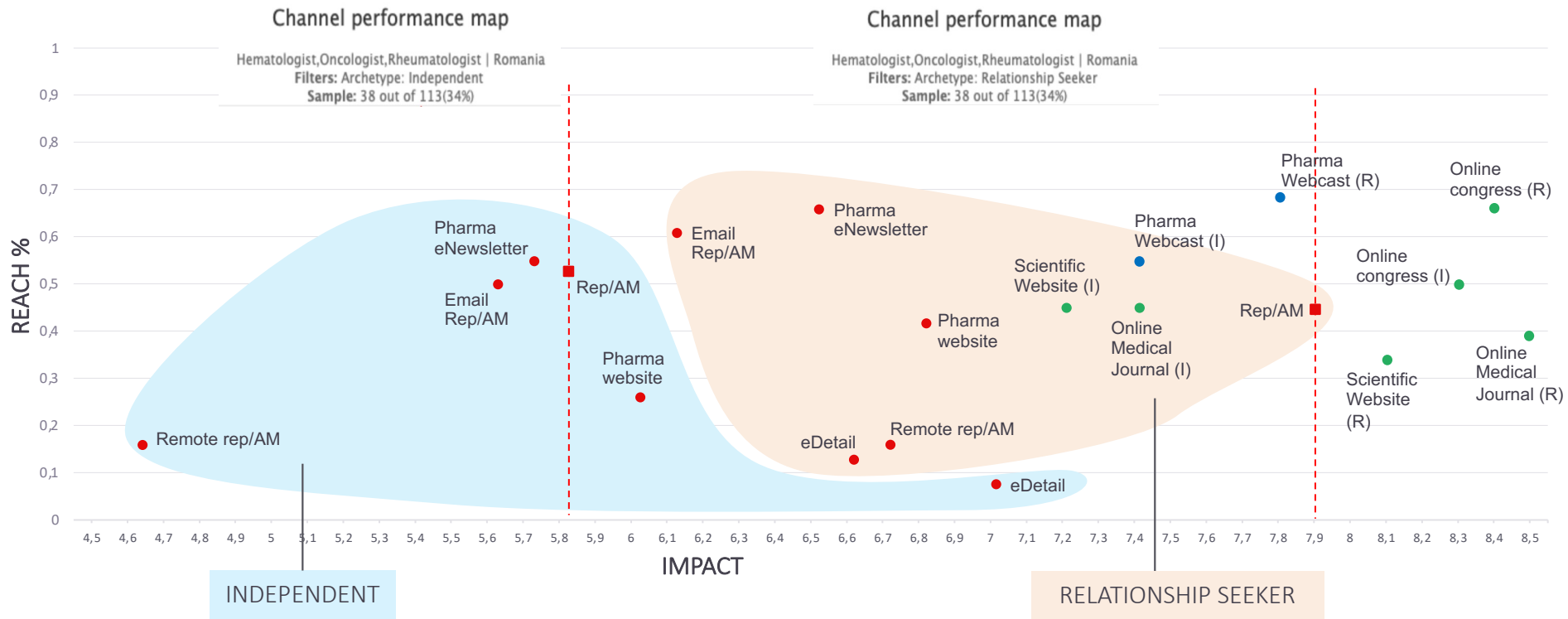
Dermatologist,Gastroenterologist,Hematologist,Neurologist,Oncologist,Rheumatologist | Romania | n=267



Source:  Navigator365™ Core Specialists EU4+UK + Romania

# Dynamic targetting will be key moving forward !

More segmented – OMNICHANNEL - approaches are needed



Source: Navigator365™ Core Specialists Romania

2021 Q4, Independent N = 38 - Relationship seeker N = 38

# Poll

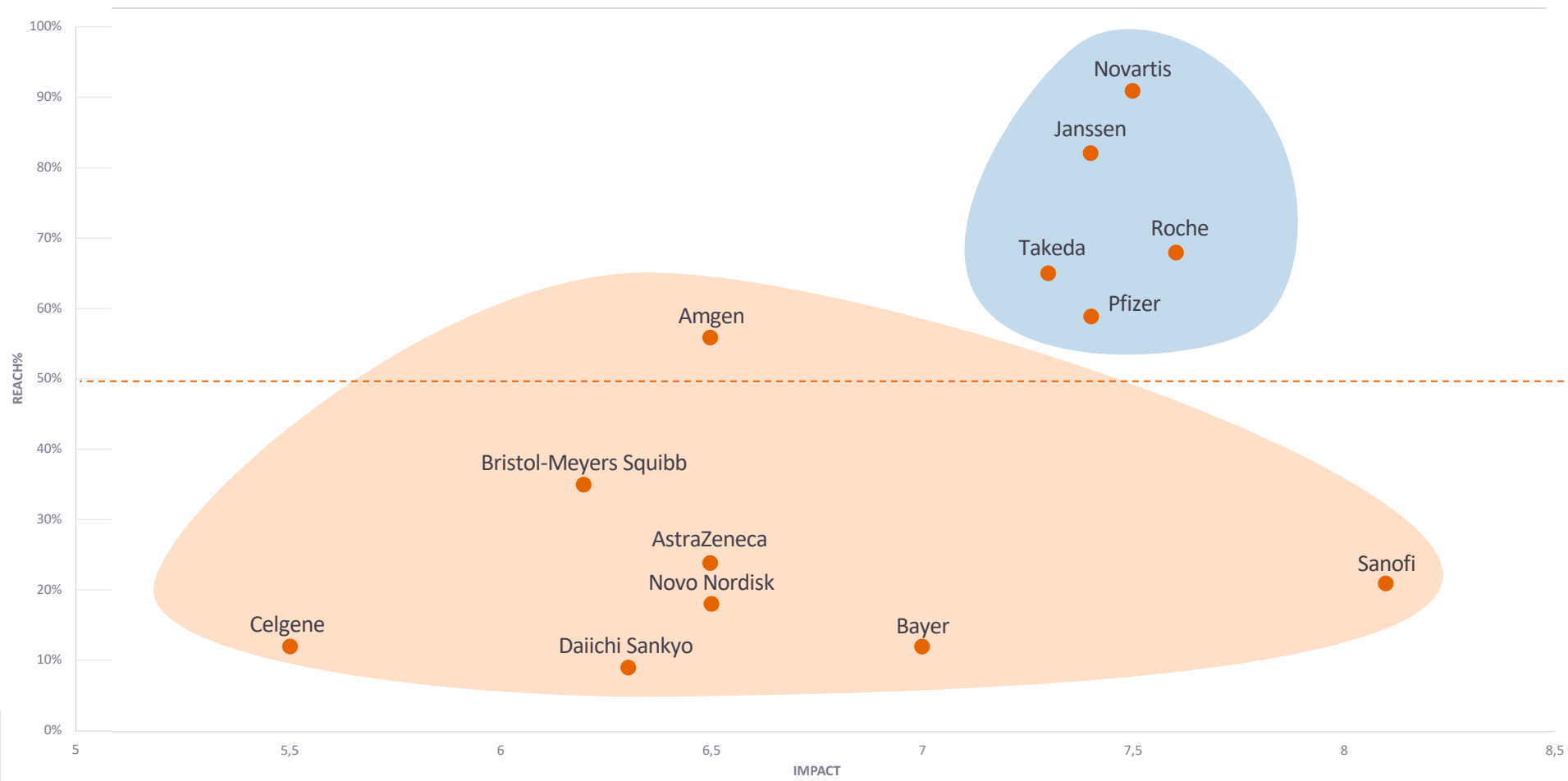
What % of digital reach is feasible in Romania?

1. >80%
2. Between 50 and 80%
3. Between 25 and 50%
4. <25%



Evidence suggests that it is feasible to reach a significant % of HCPs through digital channels in Romania ... and quite some companies have a significant upside still

### Pharma digital communication performance map – Hematology ROMANIA



Source: Navigator 365 Core – Romanian HCPs (2021)



“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*





# Navigator365™

Uniquely actionable research  
for omnichannel customer engagement  
& resource optimization

 **15k+** HCPs surveyed annually

 **40+** geographic markets worldwide

 **9+** therapeutic areas covered

 **50+** channels covered (owned/paid/earned)

 **44m+** data points for in-depth analysis

 **50+** companies use it for mix decisions

Over 5,000 biopharma users on the interactive data platform

 85% find Navigator365™ (much) better than competition (Maturometer™2022)

Want to know more? Then simply sign up for the remaining 2 webinars



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 The webinar series

2022

- 1. Looking back & forward: Key trends in the HCP mix*
- 2. Tips for your 2023 omnichannel budget planning*
- 3. Omnichannel Launch Excellence: Medical & Commercial best practices*
- 4. Omnichannel maturity: what's the industry up to? (Maturometer 2022)*

<http://www.across.health/2022-webinars>



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Question time!

## Please give us your feedback!

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# Navigator™ 365

Your compass for omnichannel customer engagement in life sciences

<https://www.across.health/navigator365>



<https://www.across.health>