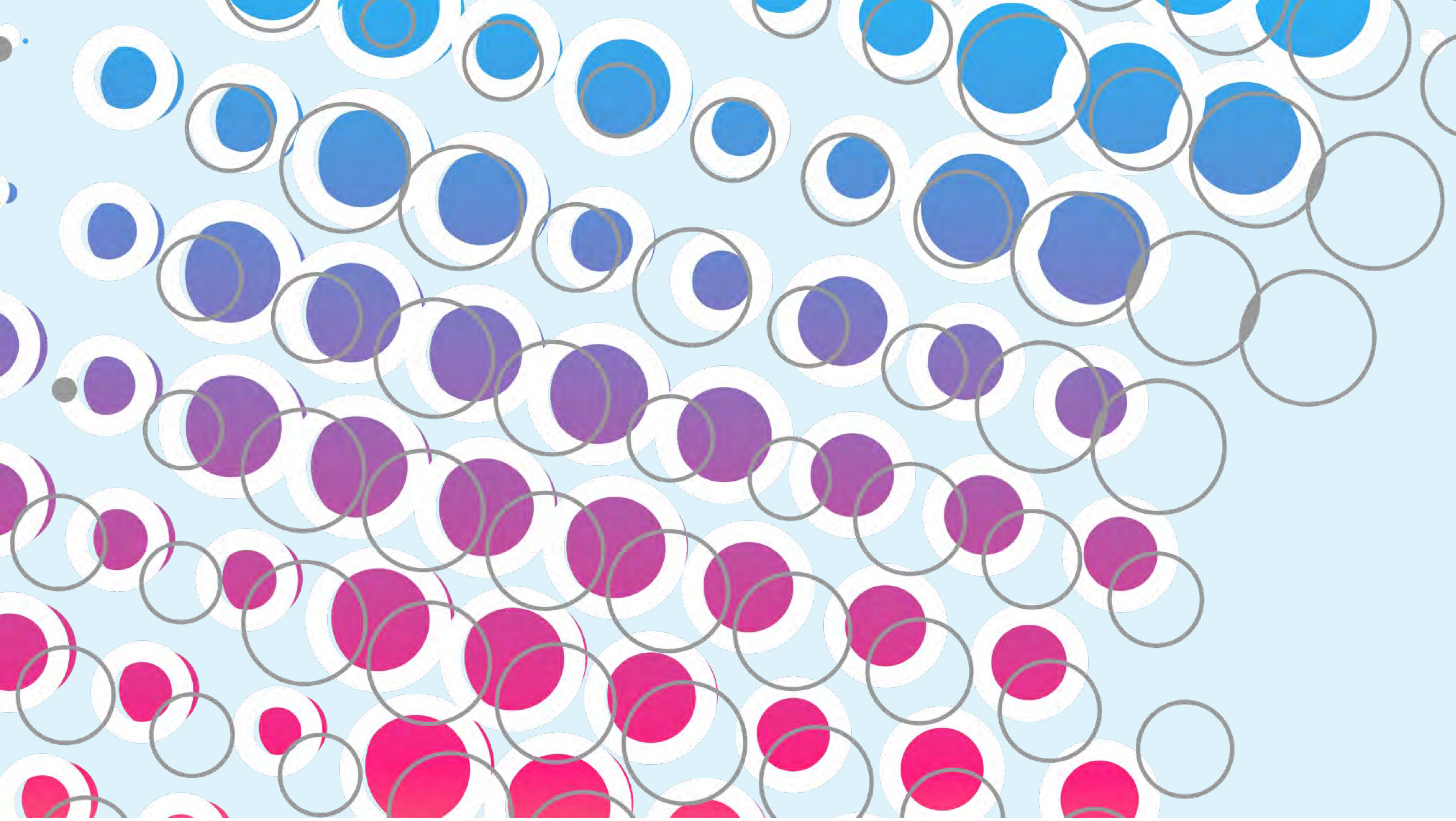


ACROSS HEALTH

a precision value & health team

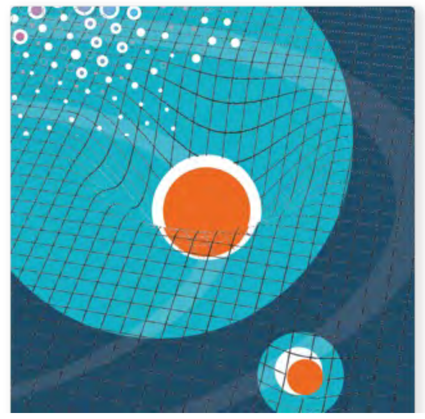
THE STATE OF OMNICHANNEL IN BIOPHARMA 2023
GLOBAL TRENDS REPORT

Insights and **highlights** from our **2023 Navigator365™** and **Maturometer™ research**

HCP
engagement

LAUNCH
trends

BENCHMARK
analysis



INDUSTRY
performance

CHANNEL
metrics

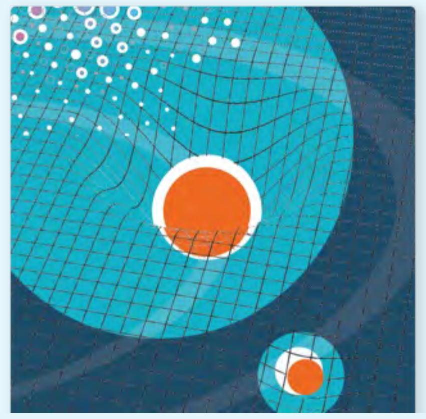
Welcome to this year's Global Trends Report on the state of omnichannel customer engagement in biopharma.

In this report, we aim to share some of 2023's most interesting insights and trends pulled from our industry-leading **Navigator365™** and **Maturometer™** research, to create a unique snapshot of what biopharma and its HCP audiences have been thinking and doing in the omnichannel space.

We look forward to your thoughts!

Ruud Kooi
MD Across Health

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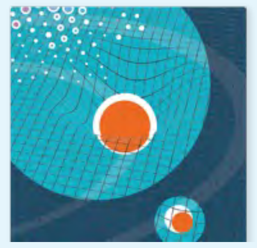

INDUSTRY


CHANNEL

INTRODUCTION

Since Covid-19, the pharmaceutical industry has witnessed a surge in digital budgets as companies strive to leverage the power of online channels to complement – and sometimes substitute for – their traditional channels for connecting with healthcare professionals (HCPs). As of 2023, the share of marketing budgets allocated to digital and omnichannel has continued to climb, hitting an all-time high of 32%.

However, amidst this growth in digital investments, a conspicuous and perplexing trend has emerged. Despite these substantial financial allocations towards digital and omnichannel initiatives, there seems to be a disconnect with the satisfaction levels of HCPs (and biopharma staff), which have, at best, plateaued or even declined (to less than 40% in the US). This must surely leave pharma stakeholders questioning the efficacy of their strategies.

This paradox underscores the complexity of effective transformation and raises critical questions about the (mis)alignment of pharma's digital engagement efforts with the constantly evolving needs and expectations of its HCP audience.

In this context, creating a robust evidence base becomes imperative for allocating budgets strategically. Benchmarking against industry competition can serve as a compass, guiding pharmaceutical companies to discern best practices, identify gaps in their approaches, and tailor their omnichannel strategies accordingly. By establishing a regular benchmark, companies can ensure that their omnichannel investments are not only in line with industry averages but also positioned to surpass them, fostering a competitive edge in an increasingly customer-centric and access-restricted landscape.

This year's annual report aims to offer some key evidence, fuelled by the latest HCP and industry insights pulled from our Navigator365™ and Maturometer™ research, to help accelerate your journey towards delivering an unparalleled omnichannel customer experience.

ABOUT US

Across Health provides end-to-end consultancy and trusted advice to senior leaders of innovative multinational healthcare organizations.

At Across Health, we develop, execute and measure pragmatic, evidence-based omnichannel customer engagement strategies and companywide digital innovation and transformation programmes that unlock growth opportunities and strengthen your competitive advantage.

Across Health is a proud member of ***Precision Value & Health****, the commercialization services division of Precision Medicine Group.*

ACROSS HEALTH
a precision value & health team

DATA SOURCES

Navigator365™ **Core**

Since research began in 2013, Across Health's Navigator365™ has surveyed more than 65,000 physicians in over 25 therapeutic areas worldwide on their omnichannel preferences and behaviour. **Navigator365™ Core** collates this research into 50 million+ datapoints that are utilized by our consultants to substantiate their strategic recommendations, as well as being accessible via a self-service, cloud-based platform through highly interactive tools and reports.

Navigator365™ **Cx Benchmark**

Navigator365™ Cx Benchmark delivers actionable HCP customer experience insights on your brand and up to six key competitors, giving you the information you need to make evidence-based decisions at the Cx, content, channel and functional level (marketing, sales, medical, patient) – and track progress over time.

Maturometer™

Each year, Across Health's **Maturometer™** surveys life science industry staff to provide a unique overview of what companies are planning and doing in the omnichannel space. It is the most widely referenced research on the state of omnichannel maturity in the industry.

DATASETS BY REGION

US	EU5	APAC	EU
United States	France	Australia	*Europe in Maturometer™ 2023 data: EU5 + Albania, Andorra, Austria, Belgium, Bulgaria, Croatia, Denmark, Ireland, Finland, Netherlands, Poland, Portugal, Romania, Slovakia, Sweden, Switzerland*
	Germany	China	
	Italy	India	
	Spain	Indonesia	
	United Kingdom	South Korea	
		Thailand	
		Vietnam	

1. HCP engagement

POWERED BY Navigator365™ Core

HCP
engagement

KEY HCP ENGAGEMENT KPIs

On the commercial front, around half of specialists prefer to be engaged by biopharma via an omnichannel approach (this increases to two-thirds in APAC) – the demand increases when we look at medical (educational) engagement.

Yet fewer than 10% of specialists are being served by the much-touted 'omnichannel rep' (engagement with a rep via remote detailing, email **and** F2F), and the results are similar if not more underwhelming in the medical setting (omnichannel MSL).

Finally, despite the majority of specialists viewing biopharma digital as important, satisfaction remains under 50% in most regions. Satisfaction levels are similar (or in some cases lower still) for the critical launch phase, which is where an omnichannel approach to engagement is arguably even more vital (especially for pre-launch educational activities).

So the journey towards a superior omnichannel customer experience with biopharma clearly has a way to go yet, offering early leaders a big opportunity to outperform the competition.

HCP ENGAGEMENT KPIs – SPECIALISTS, 2023

	US	EU5	APAC	GLOBAL*
HCP PERSPECTIVE (specialists)	2023	2023	2023	2023
	n=1956	n=4031	n=661	n=6648
HCPs who PREFER OMNICHANNEL engagement with pharma (COMMERCIAL) (% who prefer digital-only + % who prefer mix of digital and F2F)	47%	51%	66%	55%
HCPs who PREFER OMNICHANNEL engagement with pharma (MEDICAL) (% who prefer digital-only + % who prefer mix of digital and F2F)	65%	67%	77%	70%
HCPs reached by the OMNICHANNEL REP (% who engaged with rep, remote rep and rep email channels in the past 3 months)	7%	9%	7%	8%
HCPs reached by the OMNICHANNEL MSL (% who engaged with MSL, remote MSL and MSL email channels in the past 3 months)	6%	8%	4%	6%
HCPs who view pharma digital as (VERY) IMPORTANT	49%	64%	68%	60%
HCPs (VERY) SATISFIED with biopharma's digital offerings	39%	45%	53%	46%
HCPs (VERY) SATISFIED with biopharma's digital offerings AT LAUNCH	39%	44%	49%	44%

Global: US, EU5 and APAC averaged (mean)

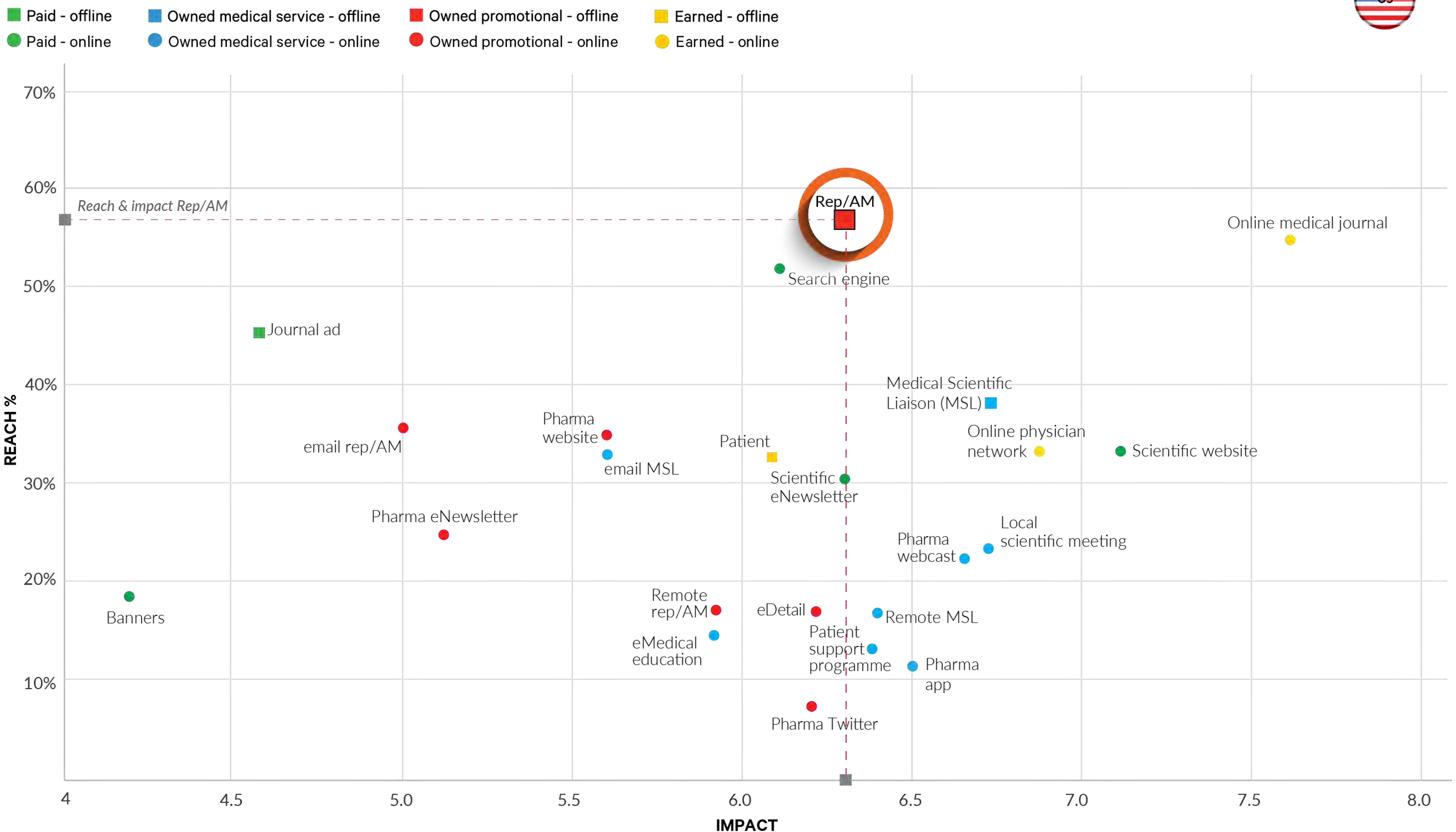
Source: Navigator365^{TM} Core, all specialists, 2023, consolidated data

CHANNEL PERFORMANCE (US)

To assess channel performance, Navigator365™ Core data covers **reach** *– the extent to which channels have been commonly encountered by HCPs – and* **impact** *– the extent to which channels influence their clinical decision-making. The reach of a particular channel is measured as the percentage of HCPs who encountered that channel in the past 3 months. For those channels they did encounter, HCPs are then asked to give an impact score between 0 and 10.*

While the full omnichannel catalogue covers over 50 channels, the following three charts plot a subset of key channels in order to give a topline view on the channel landscape among specialists in each of our three focus markets in 2023.

PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, US 2023

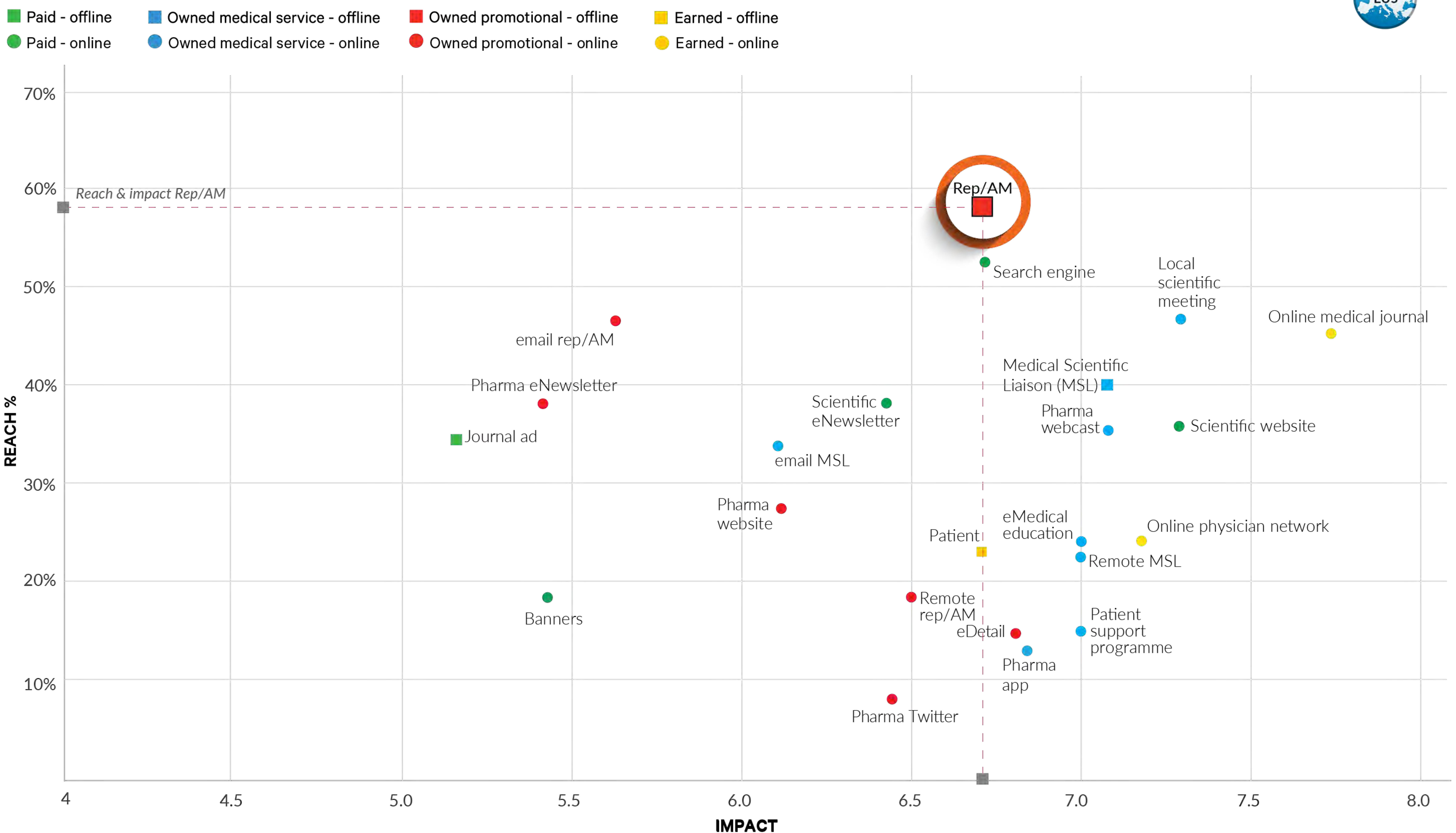


Source: Navigator365™ Core, US, all specialists, 2023 (n=1956)

CHANNEL PERFORMANCE (EU5)

To assess channel performance, Navigator365™ Core data covers ***reach*** *– the extent to which channels have been commonly encountered by HCPs – and* ***impact*** *– the extent to which channels influence their clinical decision-making. The reach of a particular channel is measured as the percentage of HCPs who encountered that channel in the past 3 months. For those channels they did encounter, HCPs are then asked to give an impact score between 0 and 10.*

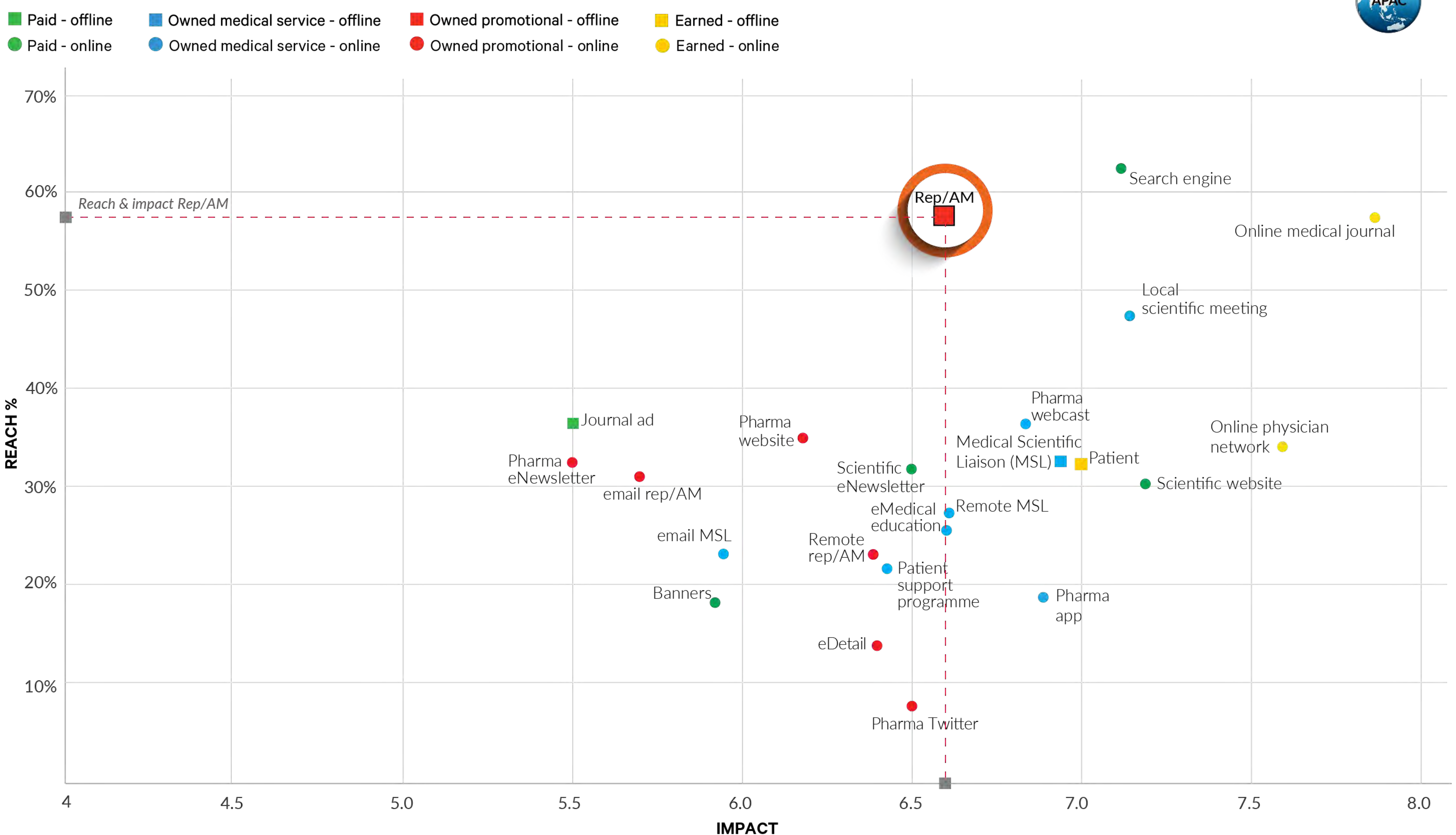
PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, EU5 2023



Source: Navigator365™ Core, EU5, all specialists, 2023 (n=4031)

CHANNEL PERFORMANCE (APAC)

PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, APAC 2023



Source: Navigator365™ Core, APAC, all specialists, 2023 (n=661)

To assess channel performance, Navigator365™ Core data covers ***reach*** *– the extent to which channels have been commonly encountered by HCPs – and* ***impact*** *– the extent to which channels influence their clinical decision-making. The reach of a particular channel is measured as the percentage of HCPs who encountered that channel in the past 3 months. For those channels they did encounter, HCPs are then asked to give an impact score between 0 and 10.*

THE DIGITAL DIVIDE

The **digital divide** assesses whether biopharma is meeting specialists' channel preferences on either promotional or medical educational fronts. It reflects the gap between what specialists WANT (% of HCPs preferring digital-only engagement with biopharma or a mix of digital and F2F) vs what they GET (% average reach of the top 3 online promo channels for the promotional setting, and the top 3 eMedical biopharma channels in the educational setting).

When it comes to biopharma's promotional activities, demand from specialists for omnichannel engagement is still outstripping supply across all three regions, and particularly in APAC. In the educational context, the much larger divide here is a consequence of both higher demand versus promotional engagement and even lower supply. This gap not only reflects a failure from pharma Medical to meet HCPs' needs, but also creates a significant opportunity for (or risk of) competitor differentiation.

DIGITAL DIVIDE - ALL SPECIALISTS, 2023

DIGITAL DIVIDE - PROMOTIONAL	US 2023 n=1956	EU5 2023 n=4031	APAC 2023 n=661
HCPs preferring digital or mix	47%	51%	66%
epharma reach	32%	37%	33%
DIGITAL DIVIDE	15%	14%	33%

DIGITAL DIVIDE - EDUCATIONAL	US 2023 n=1956	EU5 2023 n=4031	APAC 2023 n=661
HCPs preferring digital or mix	65%	67%	77%
epharma reach	24%	30%	28%
DIGITAL DIVIDE	41%	37%	49%

*The digital divide is defined as the delta between **the % of HCPs preferring digital or mix** and **the average % reach of the top 3 online educational or promo channels ('epharma reach')***

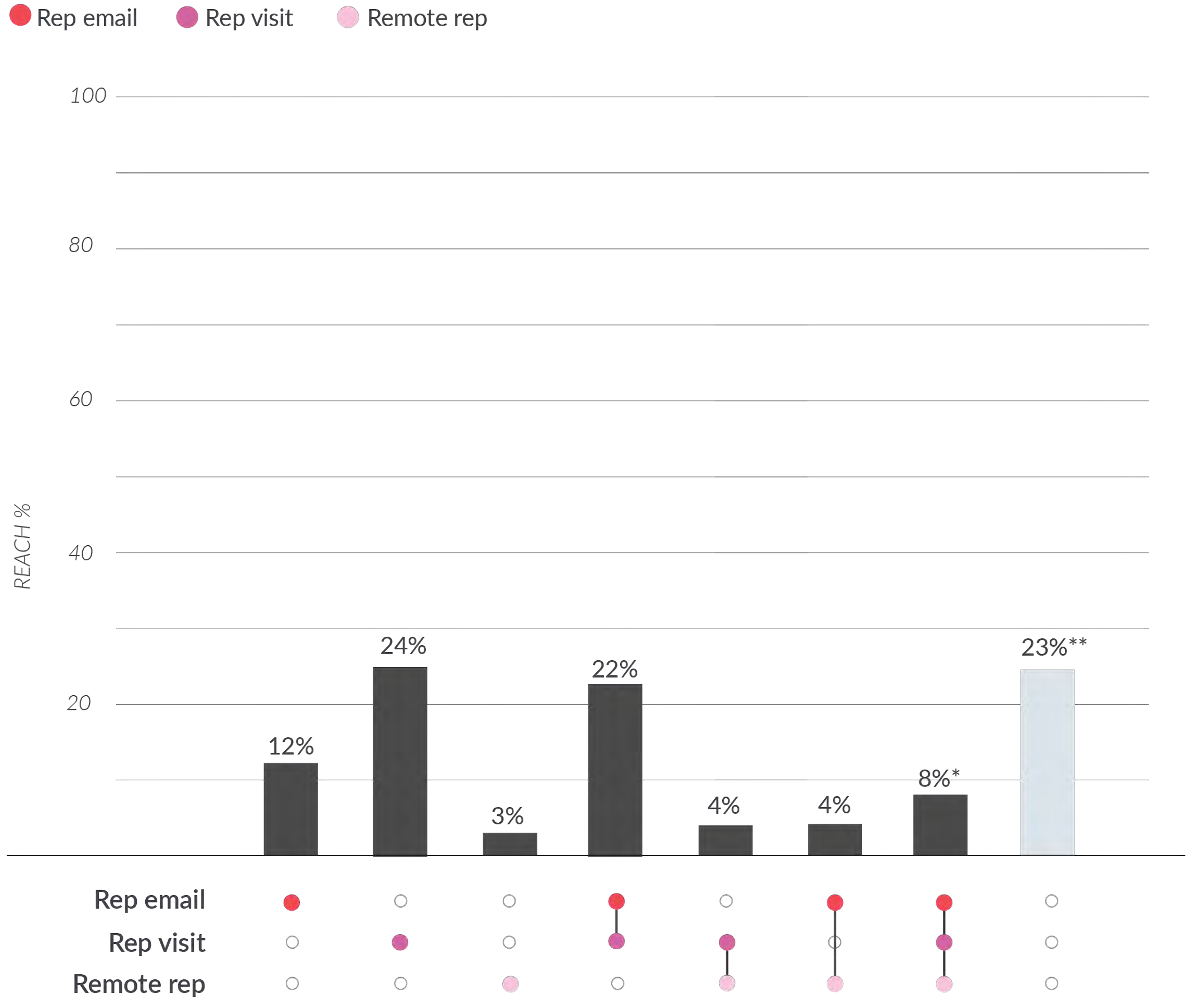
Source: Navigator365^{TM} Core, all specialists, 2023, consolidated data

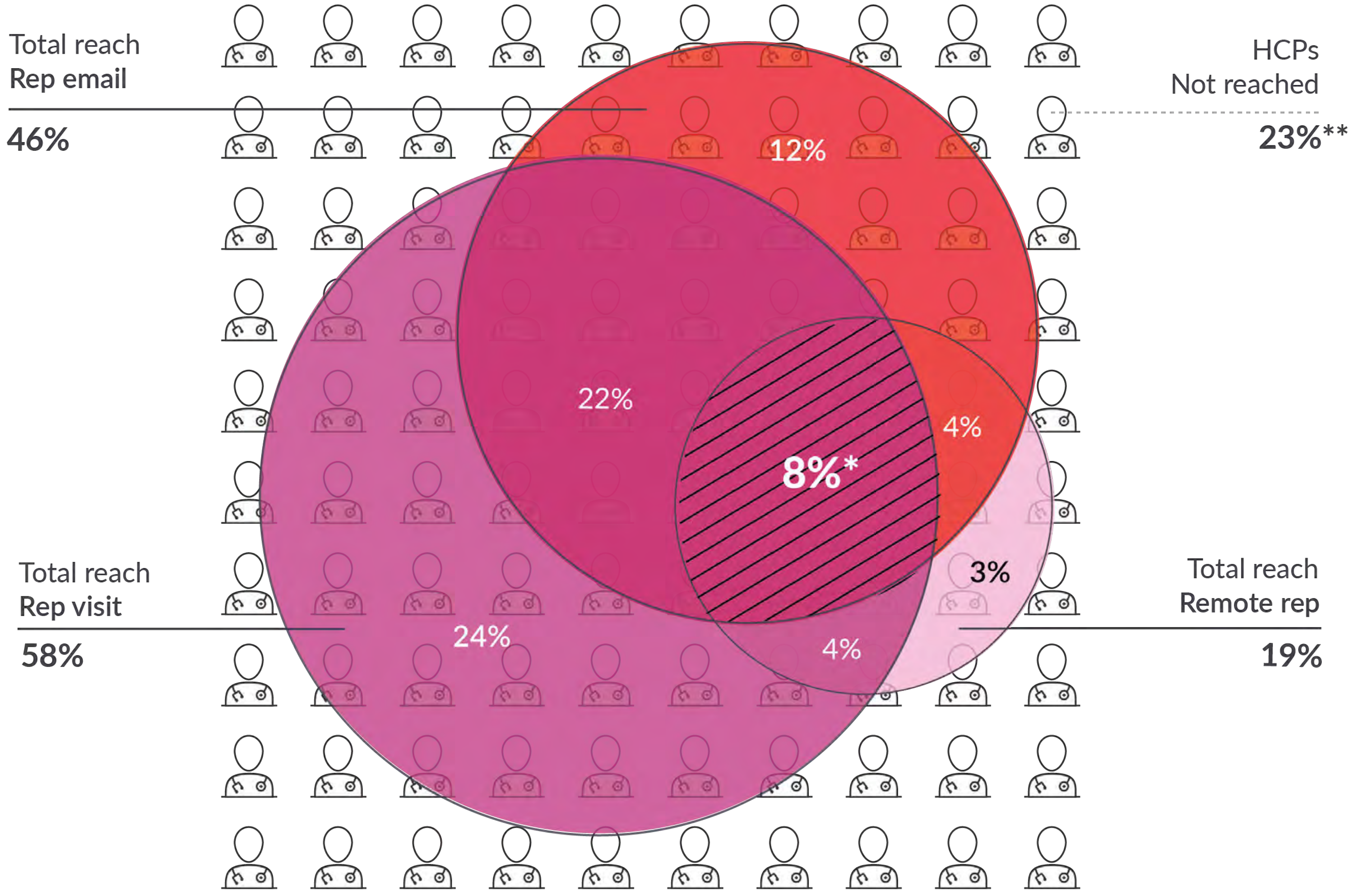
HIGHLIGHT

THE OMNICHANNEL REP

Despite the potential advantages of the omnichannel rep model in terms of enhancing impact and efficiency, only 8% of cardiologists in EU5 report engagement through all three channels (visit + email + remote). Meanwhile, just under a quarter only receive in-person rep visits, while almost a fifth of cardiologists engage exclusively through non-F2F channels (email and/or remote without visits). Also, almost a quarter are not reached by any of these three key biopharma rep channels.

OC REP REACH - CARDIOLOGISTS, EU5, 2023





*8% of the HCPs interviewed are reached in a truly omnichannel fashion (a mix of F2F, rep email and remote rep interactions)

**23% of the HCPs interviewed are not reached by any rep channel

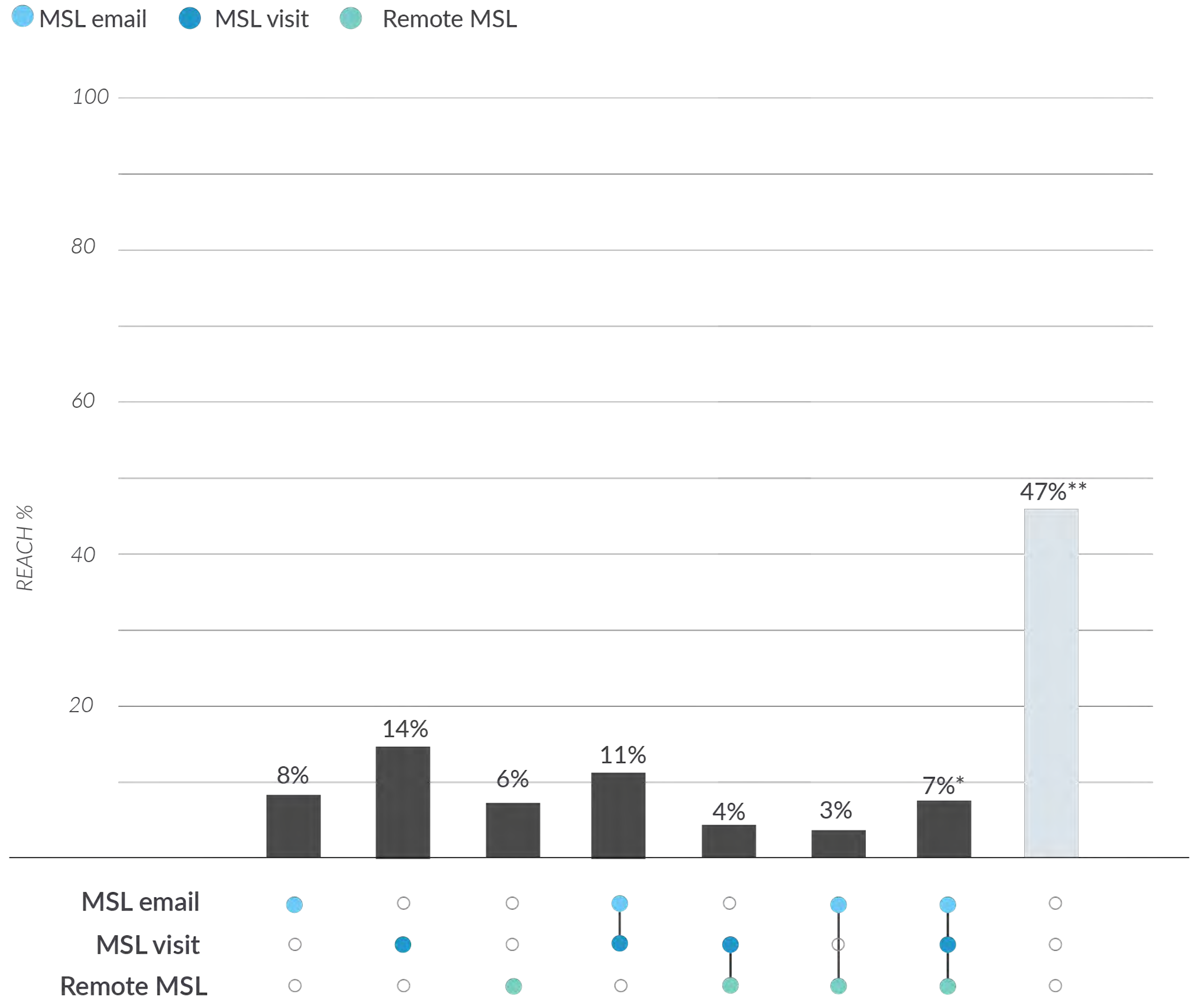
Source: Navigator365™ Core, EU5 cardiologists, 2023 (n=505)

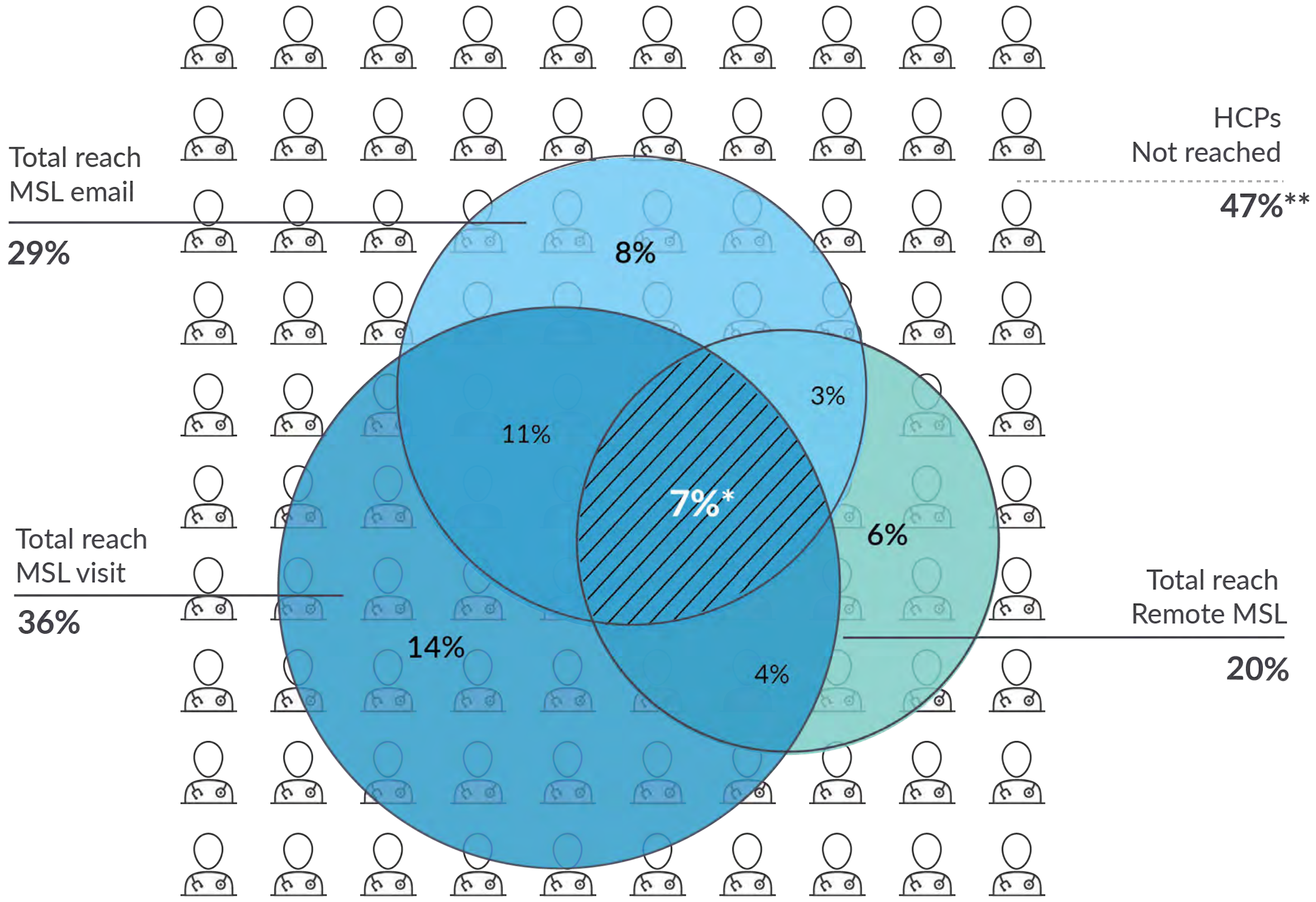
HIGHLIGHT

THE OMNICHANNEL MSL

The picture is not too dissimilar in the medical context, where only 7% of EU5 cardiologists report engaging with all three MSL channels. In addition, 14% only receive MSL visits, while 17% engage only through non-F2F channels. MSL email appears to be underleveraged compared with the use of email by commercial reps (29% vs. 46%), while remote engagement appears to be utilized at a similar level between both MSLs and reps. Finally, as many as 47% of EU5 cardiologists do not engage with any of the three MSL channels at all.

OC MSL REACH - CARDIOLOGISTS, EU5, 2023





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*7% of the HCPs interviewed are reached in a truly omnichannel fashion (a mix of F2F, MSL email and remote MSL interactions)

**47% of the HCPs interviewed are not reached by any MSL channel

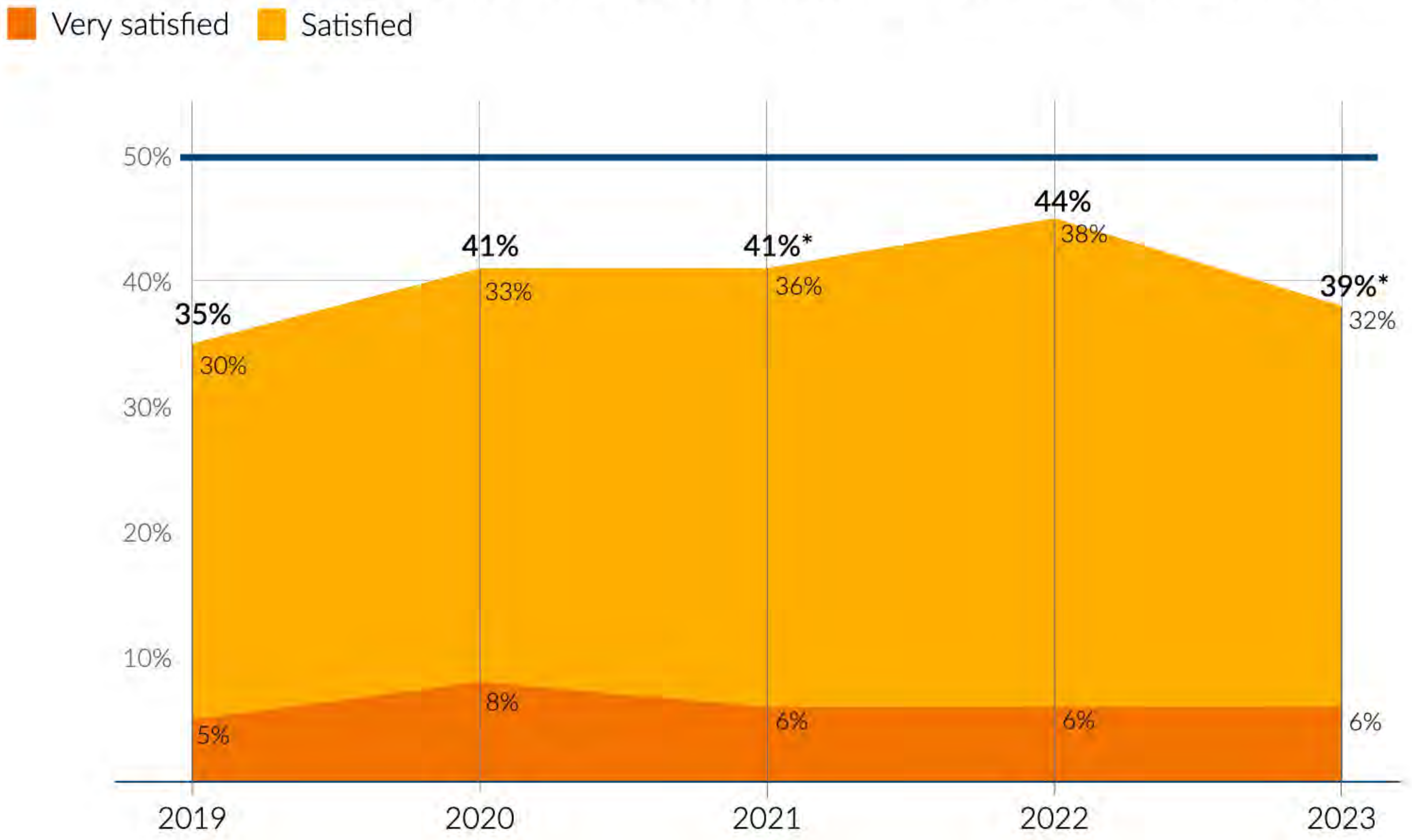
Source: Navigator365™ Core, EU5 cardiologists, 2023 (n=505)

HIGHLIGHT

HCP SATISFACTION WITH BIOPHARMA’S DIGITAL OFFERINGS HAS PLATEAUED AND REMAINS BELOW 50%

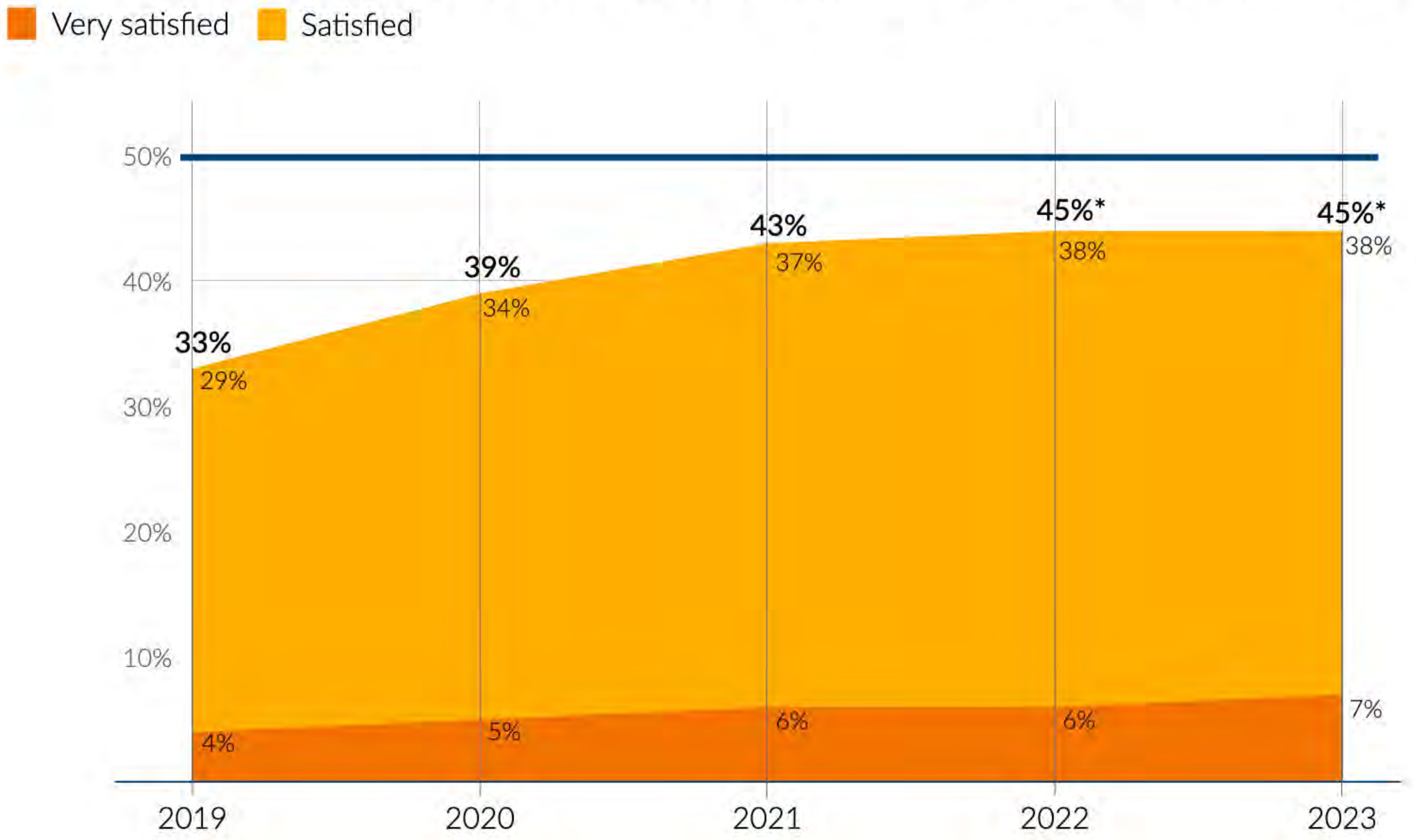
Looking first at specialists in the US, we initially see a strong pandemic-related increase in satisfaction which appears to have declined since, leaving the remaining HCPs either dissatisfied with or, at best, neutral about biopharma’s digital efforts. Combined with the fact that the proportion of HCPs describing themselves as ”very satisfied” has remained very small, this shows there is still significant room for improvement – and this despite much larger digital budgets (*see Industry section*). This trend is similar for EU5, which has seen a gradual levelling off after an initial improvement.

SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, US, 2019-2023



**Total due to rounding*
Source: Navigator365TM Core, US specialists, 2019 (n=818), 2020 (n=1303), 2021 (n=2071), 2022 (n=2208) and 2023 (n=1956)

SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, EU5, 2019-2023



**Total due to rounding*
Source: Navigator365TM Core, EU5 specialists, 2019 (n=4885), 2020 (n=5529), 2021 (n=5041), 2022 (n=4718) and 2023 (n=4031)

HIGHLIGHT

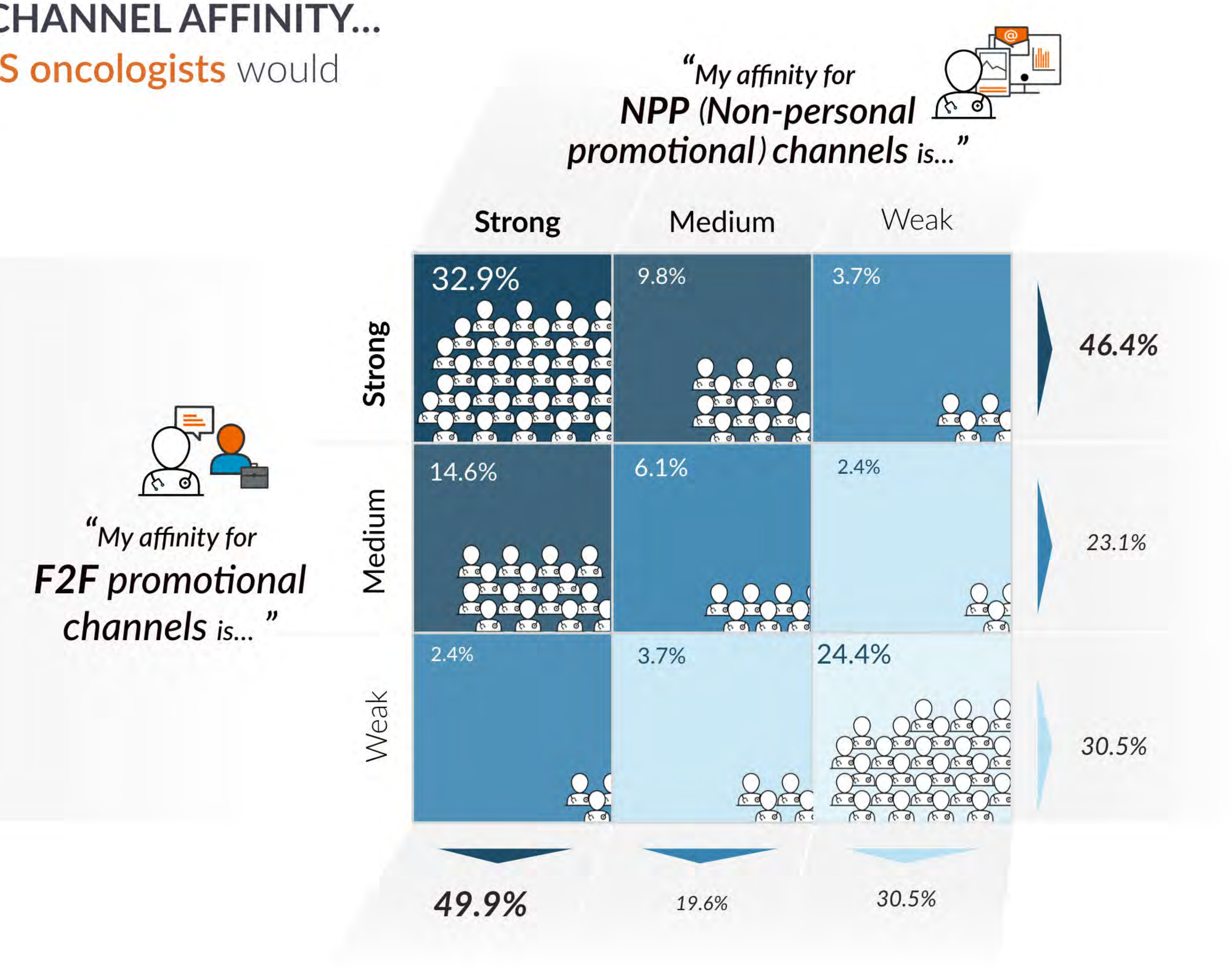
OMNICHANNEL ENGAGEMENT BEATS AN "EITHER/OR" APPROACH TO F2F AND NON-PERSONAL CHANNELS

US oncologists who express a strong affinity for F2F promo channels also tend to show a strong affinity for non-personal (NPP) channels (these are channels that do not involve direct, one-on-one interaction). In addition, the totals at the bottom of the columns show that biopharma has the potential to reach almost half of this audience with strong commercial NPP (49.9%), regardless of these customers' level of affinity for F2F. This segment is bigger than the segment with a strong F2F preference (46.4%).

These insights suggest that rooting your go-to-market approach in traditional "either/or" thinking (big focus on F2F for top segments and "NPP-only" for lower-tier segments) is suboptimal, and that omnichannel should indeed be the default option.

Meanwhile, at the other end of the continuum, as shown in the bottom right corner of the table, is the group that expresses a weak affinity for both F2F and NPP channels. The fact that this group is the second biggest segment (24.4%) further reinforces the need to provide diverse channel and content options across your audiences.

When it comes to **CHANNEL AFFINITY...** this is where **100 US oncologists** would place themselves...



	Strong	Medium	Weak	
Strong	32.9%	9.8%	3.7%	46.4%
Medium	14.6%	6.1%	2.4%	23.1%
Weak	2.4%	3.7%	24.4%	30.5%
	49.9%	19.6%	30.5%	

Source: Navigator™ Core, US oncologists, 2023 (n=200)

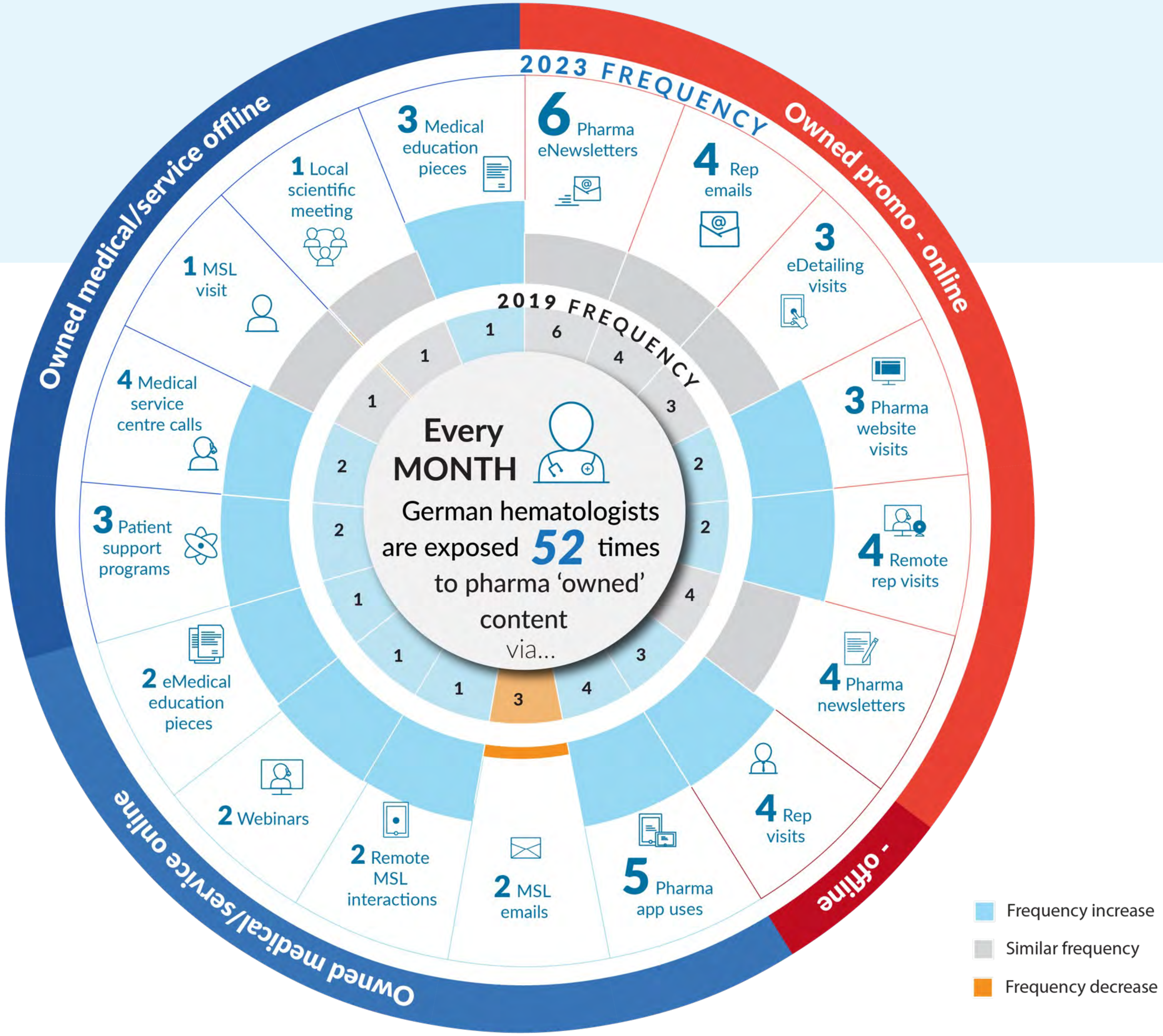
HIGHLIGHT

A MONTH IN THE (OMNICHANNEL) LIFE OF A GERMAN HEMATOLOGIST

Each month, German hematologists have over 50 interactions with biopharma content through medical and commercial 'owned' channels – both offline and online. In addition, they are exposed to biopharma content via paid (and possibly earned) channels.

When comparing the 2023 data with the corresponding numbers from 2019 – just prior to the pandemic – what's interesting is that almost all of these 17 biopharma-owned channels (whether offline or online) either stayed at a similar level or increased in frequency – we see only one channel (MSL email) experiencing a decline. Notably, most of the engagement growth occurred in the medical channels, which increased by 9 interactions a month, compared with an increase of 4 among the promotional channels.

Overall, the number of average monthly engagements rose from 41 to 52 which suggests that, for this therapy area and this market at least, engagement with pharma has not only 'bounced back' since the pandemic but actually surpassed pre-Covid levels. Perhaps investments in evidence-based customer-centric mix planning are starting to pay off, with the omnichannel approach boosting not only digital engagement but helping to drive interest in offline channels too?

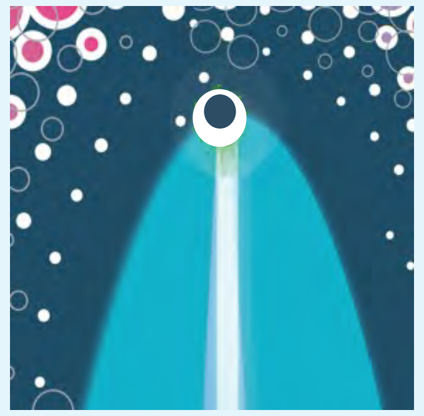


🟦 Frequency increase
⬜ Similar frequency
🟧 Frequency decrease

Source: Navigator365™ Core, German hematologists, 2019 (n=143) and 2023 (n=100)

2. LAUNCH
trends

POWERED BY Navigator365™ Core



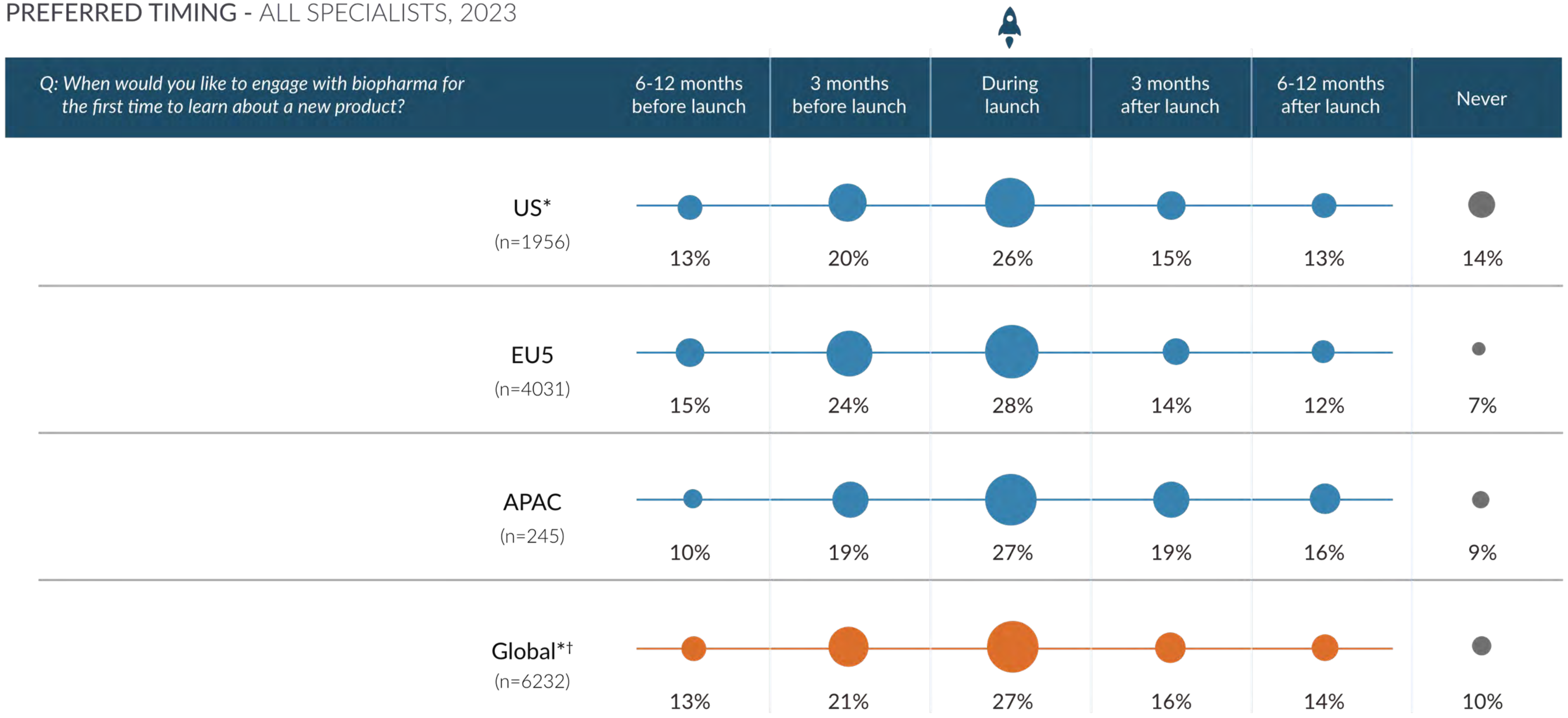
LAUNCH
trends

AROUND A THIRD OF SPECIALISTS PREFER TO START LEARNING ABOUT A NEW PRODUCT MONTHS BEFORE LAUNCH

Around a third of specialists say their preferred time for first engagement with pharma content about a new product is at least 3 months prior to launch – though there is some variation between regions, with the highest level of pre-launch interest seen in EU5 (39%) and the lowest in APAC (29%).

This opens a critical window for Market Access and Medical teams to connect with this crucial audience of possible innovators and early adopters through omnichannel data dissemination and disease education before launch. Learnings from the market during this time can also ensure Commercial has their own campaign ready to go on day 1 post-approval.

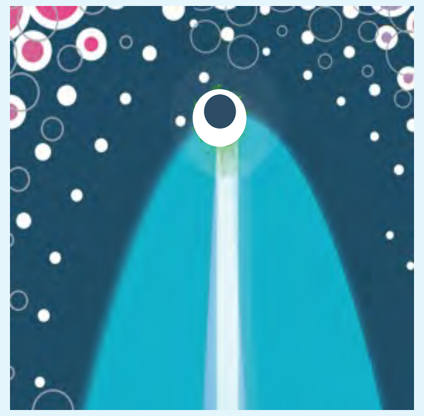
PREFERRED TIMING - ALL SPECIALISTS, 2023



Q: When would you like to engage with biopharma for the first time to learn about a new product?	6-12 months before launch	3 months before launch	During launch	3 months after launch	6-12 months after launch	Never
US* (n=1956)	13%	20%	26%	15%	13%	14%
EU5 (n=4031)	15%	24%	28%	14%	12%	7%
APAC (n=245)	10%	19%	27%	19%	16%	9%
Global*† (n=6232)	13%	21%	27%	16%	14%	10%

** Total does not equal 100% due to rounding*
† Global: US, EU5 and APAC averaged (mean)

Source: Navigator365™ Core, all specialists, 2023



IN THE LAUNCH SETTING, SPECIALISTS ARE SPLIT FAIRLY EVENLY BETWEEN IN-PERSON ENGAGEMENT WITH A REP AND AN OMNICHANNEL APPROACH

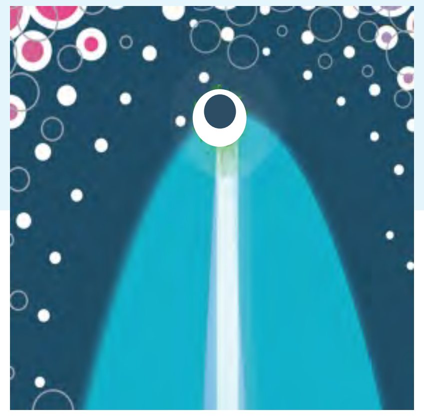
It's unsurprising that specialists continue to show a strong interest in F2F engagement when it comes to the setting of a new product launch; however, across our key markets, those specialists who prefer an omnichannel approach (digital-only or a mix) also have a significant presence – particularly in APAC. Adding digital to the launch mix therefore aligns to customer preferences, improving customer experience and launch engagement impact.

PREFERRED REP FORMAT - ALL SPECIALISTS, 2023

Q: In terms of engagement with reps in a launch setting, which option do you prefer?	Mainly in-person	Mix of in-person and digital or digital only	Prefer not to engage with biopharma reps
US (n=1956)	49%	44%	6%
EU5 (n=4031)	52%	46%	2%
APAC (n=245)	35%	60%	4%
Global*† (n=6232)	45%	50%	4%

** Total does not equal 100% due to rounding*
† Global: US, EU5 and APAC averaged (mean)

Source: Navigator365™ Core, all specialists, 2023



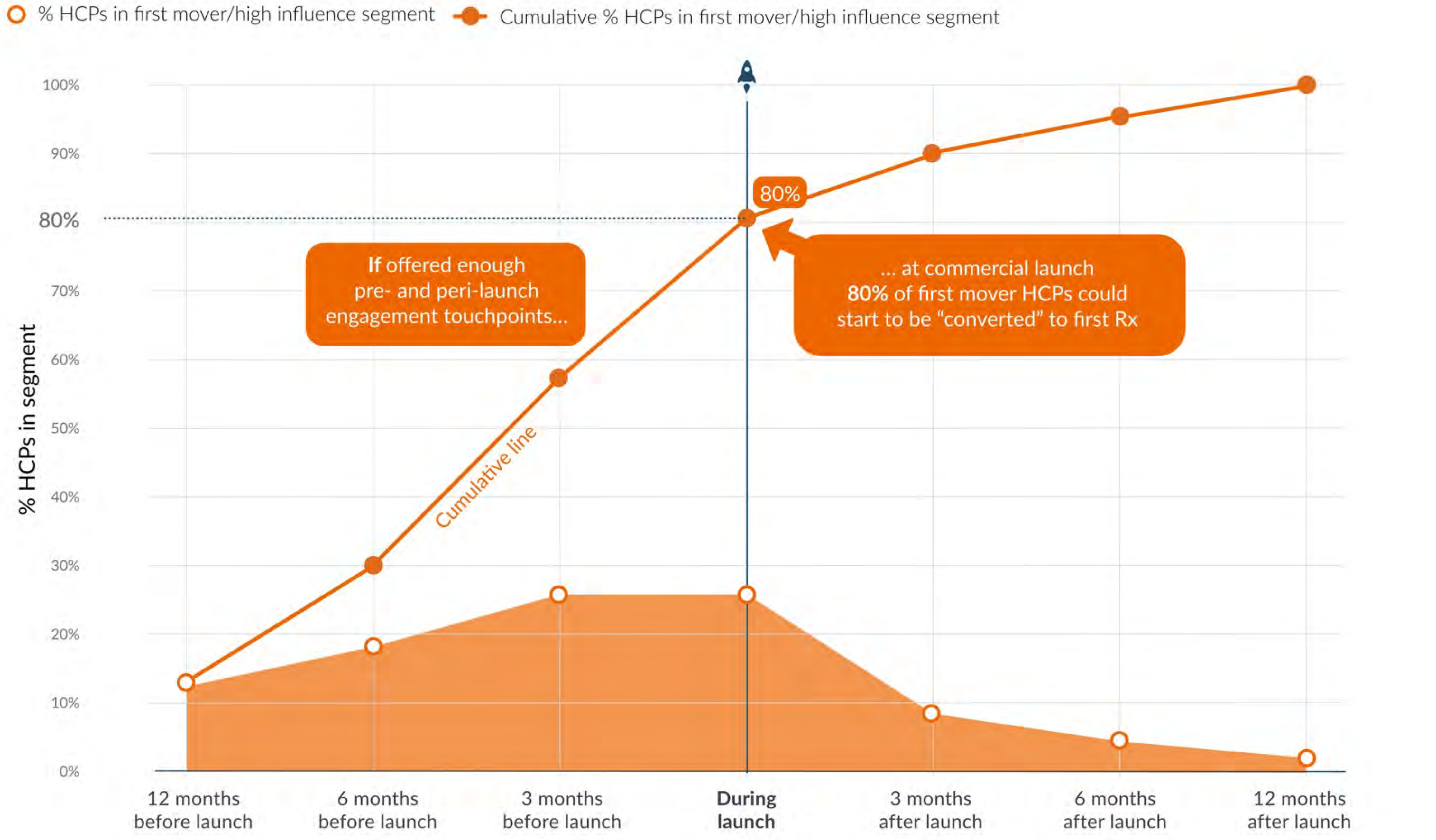
HIGHLIGHT

OVER A QUARTER OF EU5 SPECIALISTS ARE INFLUENTIAL “FIRST MOVERS”, MOST OF WHOM WOULD BENEFIT FROM PRE-LAUNCH ENGAGEMENT

Based on the question “When do you start prescribing new products?” our research tells us that 47% of EU5 specialists categorize themselves as “first movers” who typically prescribe new products as soon as they are available; those who wait for initial (positive) feedback are "early majority” (39%) while "late majority” (14%) HCPs won’t prescribe until a full safety profile is established. Incorporating specialists’ self-reported level of influence to the equation, identifies the 26% of prescribers who are both first mover & highly networked – these are your top priority pre-launch segment.

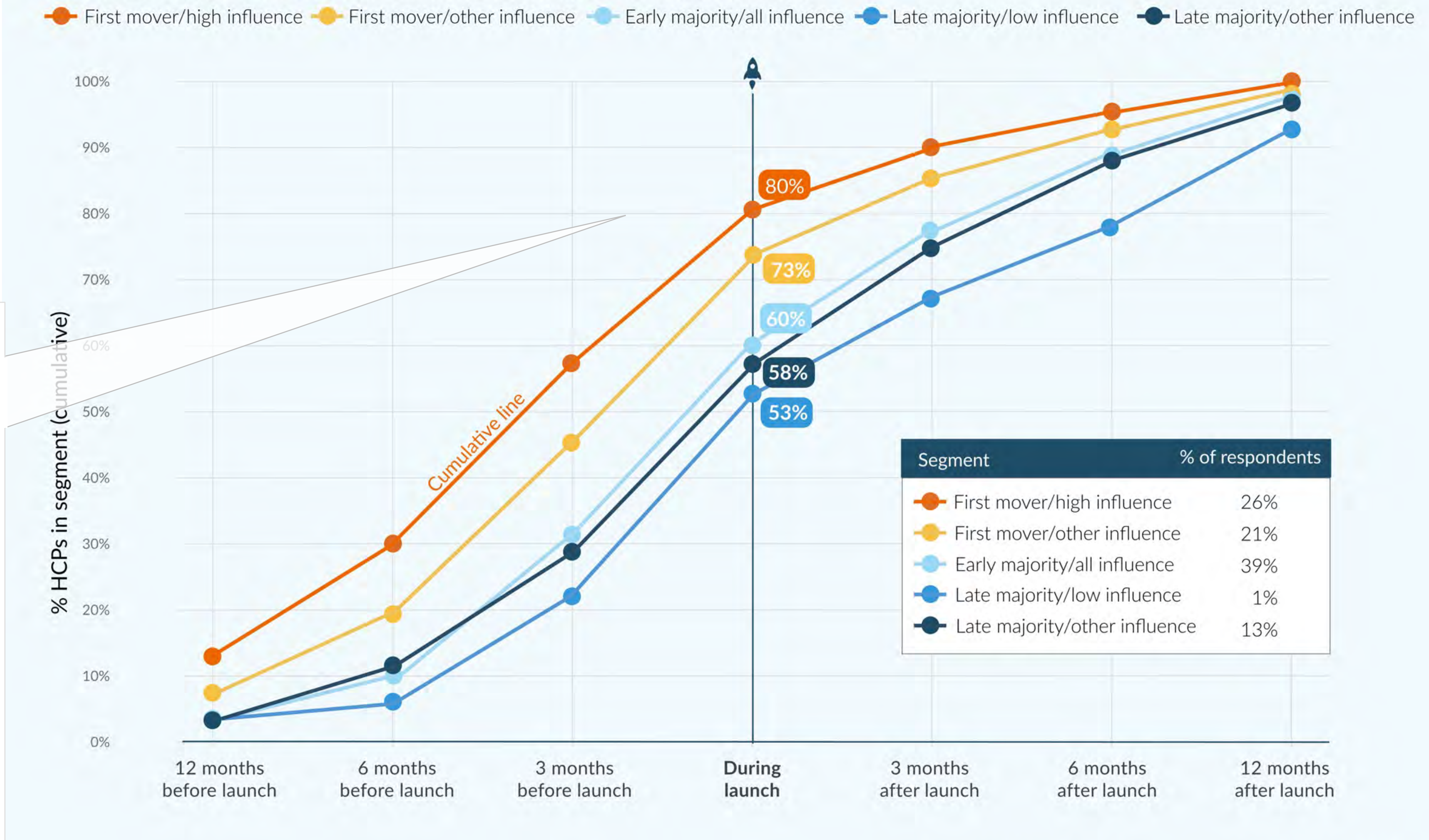
Offering enough pre-launch engagement touchpoints means this crucial segment can start the customer journey much sooner and can be "converted" to first Rx at commercial launch faster than HCPs who are still at the top or middle of the funnel at that stage.

PREFERRED TIME OF FIRST ENGAGEMENT FOR LAUNCH PRODUCT - **FIRST MOVER SEGMENT**



Source: Navigator365™ Core, EU specialists, 2023 (n=1036)

PREFERRED TIME OF FIRST ENGAGEMENT FOR LAUNCH PRODUCT - **ALL SEGMENTS**



Segment	% of respondents
First mover/high influence	26%
First mover/other influence	21%
Early majority/all influence	39%
Late majority/low influence	1%
Late majority/other influence	13%

Source: Navigator365™ Core, EU specialists, 2023 (n=3987)

3. BENCHMARK
analysis

POWERED BY Navigator365™ **Core** AND Navigator365™ **Cx Benchmark**

BENCHMARK
analysis

WHICH COMPANIES ARE LEADING AT THE CHANNEL LEVEL? (1/2)

In workshops, we often get the question “Who is ahead in the omnichannel space?”. In earlier times, we would have said: “There is no consistent pharma leader, only local pockets of excellence – in fact, the customer is ahead of pharma.” However, two years post-Covid and we see more and more consistency cropping up, strongly suggesting a robust companywide and systematic omnichannel strategy and execution at certain companies.

When we ask over 1600 US specialists which companies are leading in eight key offline and online channels, the same names crop up again and again, with AbbVie in particular leading the way across the range of channels (the percentage figure shows the margin between the leader and the second closest company) – the picture is less homogeneous in the areas of endocrinology, pulmonology and hematology.

LEADING COMPANY PER CHANNEL – SPECIALISTS, US, 2023

US

	Rep	Remote rep	Website	MSL	Remote MSL	Webcast	Offline scientific meeting	Patient support programme		
DERMATOLOGISTS (n=201)	abbvie (65%)	abbvie (65%)	abbvie (56%)	abbvie (67%)	abbvie (62%)	abbvie (48%)	abbvie (51%)	abbvie (79%)	62%	8 x abbvie
RHEUMATOLOGISTS (n=200)	abbvie (38%)	abbvie (43%)	abbvie (39%)	abbvie (39%)	abbvie (26%)	abbvie (30%)	abbvie (43%)	abbvie (51%)	39%	8 x abbvie
NEUROLOGISTS (n=200)	abbvie (26%)	abbvie (33%)	Biogen (6%)	abbvie (29%)	abbvie (6%)	abbvie (10%)	abbvie (27%)	abbvie (23%)	20%	7x abbvie
CARDIOLOGISTS (n=200)	Abbott (12%)	Abbott (39%)	Abbott (3%)	Abbott (14%)	Abbott (6%)	AstraZeneca (5%)	Abbott (42%)	NOVARTIS(27%)	19%	6x Abbott
ONCOLOGISTS (n=200)	Bristol Myers Squibb (1%)	AstraZeneca (10%)	Bristol Myers Squibb(15%)	Bristol Myers Squibb(6%)	Bristol Myers Squibb(30%)	AstraZeneca (26%)	Bristol Myers Squibb (6%)	Bristol Myers Squibb(17%)	14%	6x Bristol Myers Squibb
ENDOCRINOLOGISTS (n=201)	Lilly (10%)	novo nordisk(18%)	novo nordisk (8%)	Lilly (12%)	novo nordisk(11%)	Lilly (16%)	novo nordisk (9%)	novo nordisk(50%)	17%	5x novo nordisk
PULMONOLOGISTS (n=201)	AstraZeneca (2%)	GSK (27%)	GSK (2%)	GSK (15%)	AstraZeneca (26%)	GSK (4%)	GSK (20%)	AstraZeneca (43%)	17%	5x GSK
HEMATOLOGISTS (n=201)	ALEXION (8%)	Genentech (3%)	ALEXION (29%)	abbvie (25%)	MERCK (3%)	abbvie (15%)	abbvie (7%)	AMGEN (33%)	15%	3x abbvie
	average margin 20%	30%	20%	26%	21%	19%	26%	40%		

% = % margin between leader company and second place company

Source: Navigator365™ Core, US specialists, 2023 (n=1604)

WHICH COMPANIES ARE LEADING AT THE CHANNEL LEVEL? (2/2)

Asking over 4000 European specialists gives a similar (if even less varied) picture, with AstraZeneca and AbbVie (again) leading the pack in a number of therapeutic areas.

LEADING COMPANY PER CHANNEL – SPECIALISTS, EU5, 2023

EU5

	Rep	Remote rep	Website	MSL	Remote MSL	Webcast	Offline scientific meeting	Patient support programme		
DERMATOLOGISTS (n=505)	abbvie (26%)	abbvie (36%)	abbvie (29%)	abbvie (46%)	abbvie (22%)	abbvie (18%)	abbvie (41%)	abbvie (40%)	*32%*	8 x abbvie
ONCOLOGISTS (n=506)	AstraZeneca (35%)	AstraZeneca (39%)	AstraZeneca (22%)	AstraZeneca (36%)	AstraZeneca (34%)	AstraZeneca (34%)	AstraZeneca (46%)	AstraZeneca (4%)	*31%*	8 x AstraZeneca
PULMONOLOGISTS (n=501)	AstraZeneca (23%)	AstraZeneca (38%)	AstraZeneca (37%)	AstraZeneca (26%)	AstraZeneca (26%)	AstraZeneca (19%)	AstraZeneca (21%)	AstraZeneca (31%)	*28%*	8 x AstraZeneca
RHEUMATOLOGISTS (n=502)	abbvie (30%)	abbvie (15%)	abbvie (26%)	abbvie (33%)	abbvie (12%)	abbvie (11%)	abbvie (28%)	abbvie (10%)	*21%*	8 x abbvie
CARDIOLOGISTS (n=505)	AstraZeneca (9%)	AstraZeneca (15%)	AstraZeneca (9%)	AstraZeneca (15%)	AstraZeneca (22%)	AstraZeneca (27%)	AstraZeneca (1%)	Abbott (1%)	*12%*	7x AstraZeneca
HEMATOLOGISTS (n=505)	Johnson&Johnson Innovative Medicine (14%)	abbvie (8%)	Johnson&Johnson Innovative Medicine (1%)	Johnson&Johnson Innovative Medicine (18%)	Johnson&Johnson Innovative Medicine (13%)	Johnson&Johnson Innovative Medicine (17%)	Johnson&Johnson Innovative Medicine (27%)	Johnson&Johnson Innovative Medicine (1%)	*12%*	7x Johnson&Johnson Innovative Medicine
ENDOCRINOLOGISTS (n=503)	novo nordisk (9%)	Lilly (7%)	novo nordisk (1%)	Lilly (14%)	Lilly (12%)	Lilly (13%)	Lilly (5%)	Lilly (11%)	*9%*	6x Lilly
NEUROLOGISTS (n=504)	NOVARTIS (8%)	Biogen (8%)	Biogen (16%)	NOVARTIS (27%)	Biogen (7%)	Biogen (11%)	NOVARTIS (4%)	Biogen (7%)	*11%*	5x Biogen
	average margin 19%	*21%*	*18%*	*27%*	*19%*	*19%*	*22%*	*13%*		

% = % margin between leader company and second place company

Source: Navigator365^{TM} Core, EU5 specialists, 2023 (n=4031)

WHAT DRIVES AN OPTIMAL CX?

When it comes to Cx drivers related to biopharma engagement, specialists of all stripes rate 'knowledgeable staff' as the most important dimension. 'Easy to engage with' comes a close second (first in the US) – with 'Respect my time' also scoring well, it's clear that HCPs are looking for pharma to engage in a way that puts the customer at the centre of any interaction, at a time and in a way that suits them best.

	GLOBAL	US	EU5	APAC
Driver	n=2096	n=1036	n=1680	n=453
Knowledgeable staff	1st	2nd	1st	1st
Easy to contact/engage with	2nd	1st	2nd	2nd
Respects my time	3rd	3rd	3rd	4th
Fast response/feedback	4th	4th	4th	3rd
Knows my professional interests	5th	5th	5th	6th
I can get information & service through any channel	6th	6th	6th	5th
Knows & respects my channel preference	7th	7th	7th	7th

Source: Navigator365™ Cx Benchmark, all specialists, 2023

HIGHLIGHT

SEARCHING FOR THE “ULTIMATE” KPI FOR HCP CUSTOMER EXPERIENCE IN BIOPHARMA

Biopharma is showing an increasing interest in optimizing customer experience – and measuring it to prove its business impact. Pharma companies are busy exploring several macro-level KPIs commonly used in other industries, including Net Promoter Score (NPS), Customer Effort Score (CES) and Customer Satisfaction (CSAT). But are these KPIs all equally relevant (and actionable)?

To address this important question, we first took a deep dive into our Navigator365™ Core and Navigator365™ Cx Benchmark data. We took the top-5 pharma companies at the overall therapy area level (Core) with a deeper dive into their respective breast cancer brands (Cx Benchmark) for four of the top-5 pharma companies (as one did not have an actively promoted brand in this space).

This ‘big picture’ table shows that the first position (highlighted) is not consistently awarded – all three measures at the company level reveal different leaders. The picture is the same at the brand level – with one new leader. Interestingly, Pfizer, AstraZeneca and Merck are relatively consistent at company level, but some companies show strong swings.

The deltas between the scores for the leading (high) and last (low) company tend to be small (see HILO) – except for brand-level NPS, which stands out as the most differentiating of the KPIs tested.

	COMPANY LEVEL*			BRAND LEVEL**	
Company	CSAT	CES	NPS	CES	NPS
Merck	**1st** (72%)	2nd (48%)	**1st** (4)	2nd (64%)	**1st** (37)
Pfizer	3rd (71%)	2nd (48%)	2nd (2)	3rd (60%)	3rd (7)
Novartis	5th (66%)	**1st** (50%)	3rd (-2)	3rd (60%)	4th (0)
AstraZeneca	4th (68%)	4th (45%)	4th (-5)	**1st** (66%)	2nd (24)
Bristol Myers Squibb	**1st** (72%)	5th (44%)	5th (-6)	-	-
HILO delta	*6%*	*6%*	*10*	*6%*	*37*

CSAT: Customer Satisfaction
CES: Customer Effect Score
NPS: Net Promotor Score

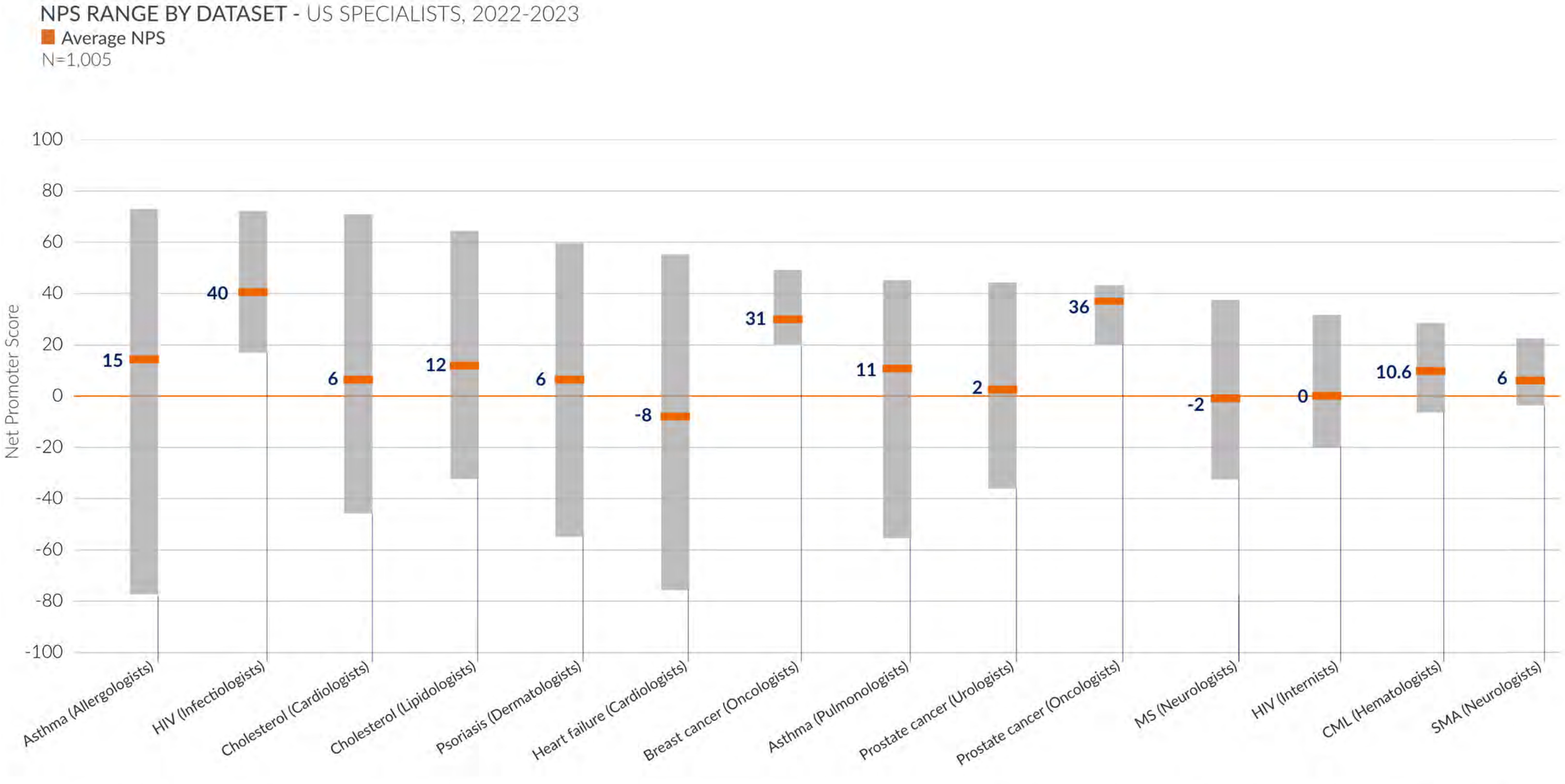
**Source: Navigator365™ Core, US oncologists, 2023 (n=200)*
***Source: Navigator365™ Cx Benchmark, US breast cancer, 2023 (n=101)*

HIGHLIGHT

NPS VARIES DRAMATICALLY BETWEEN INDICATIONS AND TREATER TYPES (US, ALL BRANDS)

Navigator365™ Cx Benchmark allows for in-depth benchmarking at the brand level and includes NPS as a standard (in addition to key channels, content types, Cx attributes, frequency, recency, and CES, among others). Looking at fourteen Cx Benchmarks conducted in the US between Q4 2022 and Q1 2023 (n=1,005; average 72 respondents and 5 brands per Cx Benchmark report), we plotted the range of brands' overall NPS across the various therapy areas. All maximum NPS are positive (the average maximum NPS is 50), with the highest score seen in Asthma (73); the lowest maximum NPS scores go to HIV (33), CML (29) and SMA (23).

Between treater types, scores can vary for the same brands, with the most dramatic differences seen in HIV-infectiologist (72) vs HIV-internist (33), and Asthma-allergologist (73) vs Asthma-pulmonologist (46). For Cholesterol-cardiologist (71) and Cholesterol-lipidologist (65), the maximum scores are similar. Averaging all the minimum NPS we get -28 – only three of our Cx Benchmarks have a minimum NPS that does not dip below zero: HIV-infectiologist (18), Breast cancer-oncologist (21) and Prostate cancer-oncologist (20). Since scores can therefore vary strongly not only between indications but also between treater types, benchmarking should be done at this level.



Net Promotor Score (NPS) is calculated by subtracting the percentage of detractors from the percentage of promotors.

***Source:** Navigator365™ Cx Benchmark, US specialists, Q4 2022–Q1 2023*

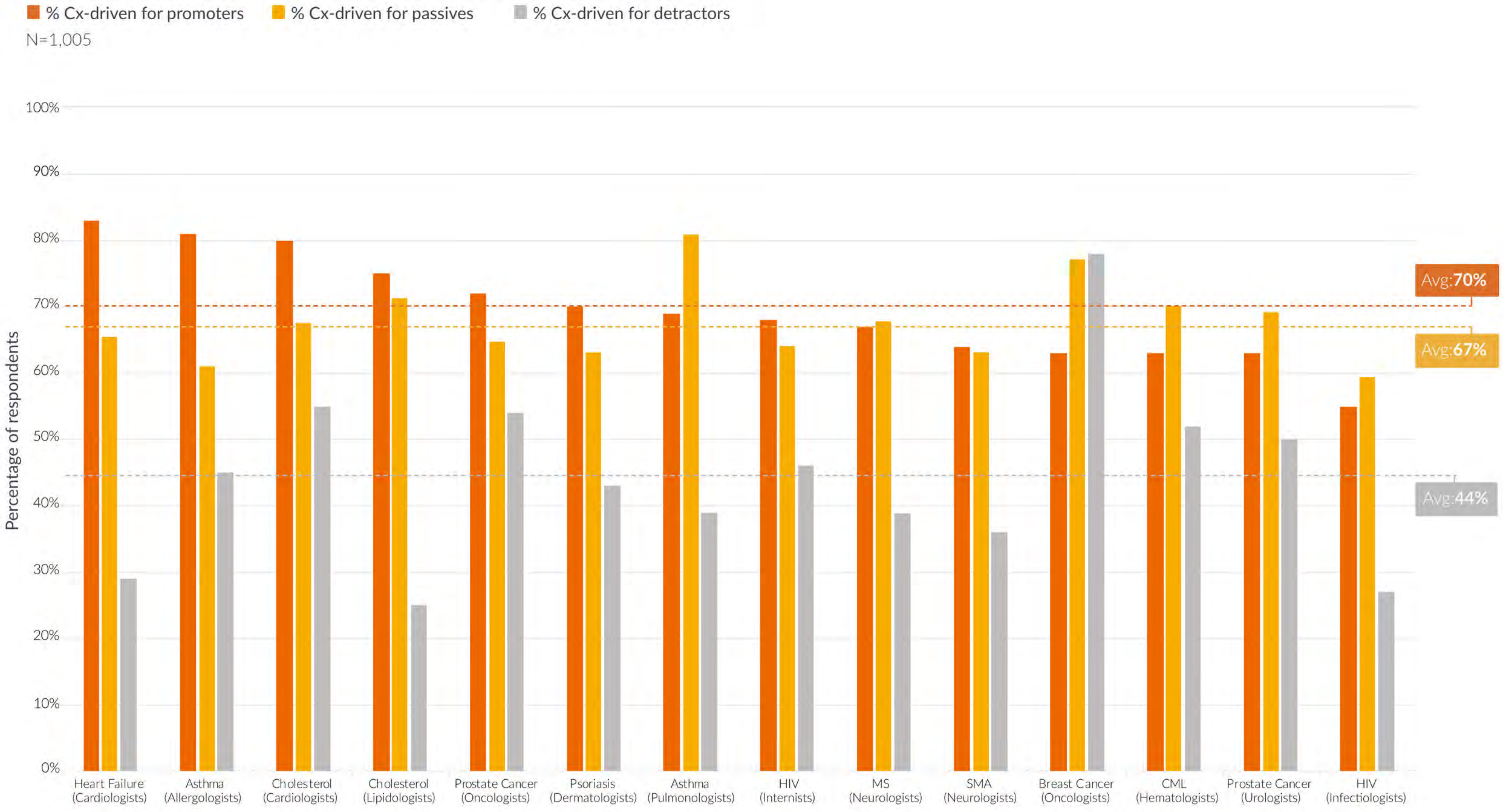
HIGHLIGHT

HIGH NPS RATINGS FROM PROMOTER HCPs ARE DRIVEN LARGELY BY CUSTOMER EXPERIENCE

Higher-scoring respondents – both passives and promoters – tend to attribute their NPS rating to Cx-related factors (defined as: high-quality omnichannel engagements) rather than brand attributes (drug characteristics such as efficacy and tolerability, etc). In heart failure, for instance, 83% of brand promoters state that their score was mainly driven by Cx; the average for promoters across all 14 benchmark surveys is 70%. Since promoters tend to prescribe significantly more than passives, the difference between an “OK” and a “great” experience – one that might bump a passive score up to a promoter score – has the potential to have a large effect and therefore represents a significant opportunity.

If you look at the NPS drivers for detractors, the picture is almost the opposite – on average only 44% say their low score is driven by Cx factors, with most linking instead to brand attributes. It does make sense that Cx is less likely to have an influence if HCPs feel that the (brand) basics are not already in place. We’d go so far as to say that efficacy and other brand attributes should be at least on par with other brands – if you do not have that, your chances of hitting a high NPS are non-existent. But once you are at that level (or close to it), you can win the hearts (and heads) of customers by improving Cx.

% OF SPECIALISTS WHOSE NPS RATING WAS DRIVEN BY CX FACTORS



***Source:** Navigator365™ Cx Benchmark, US specialists, Q4 2022–Q1 2023*

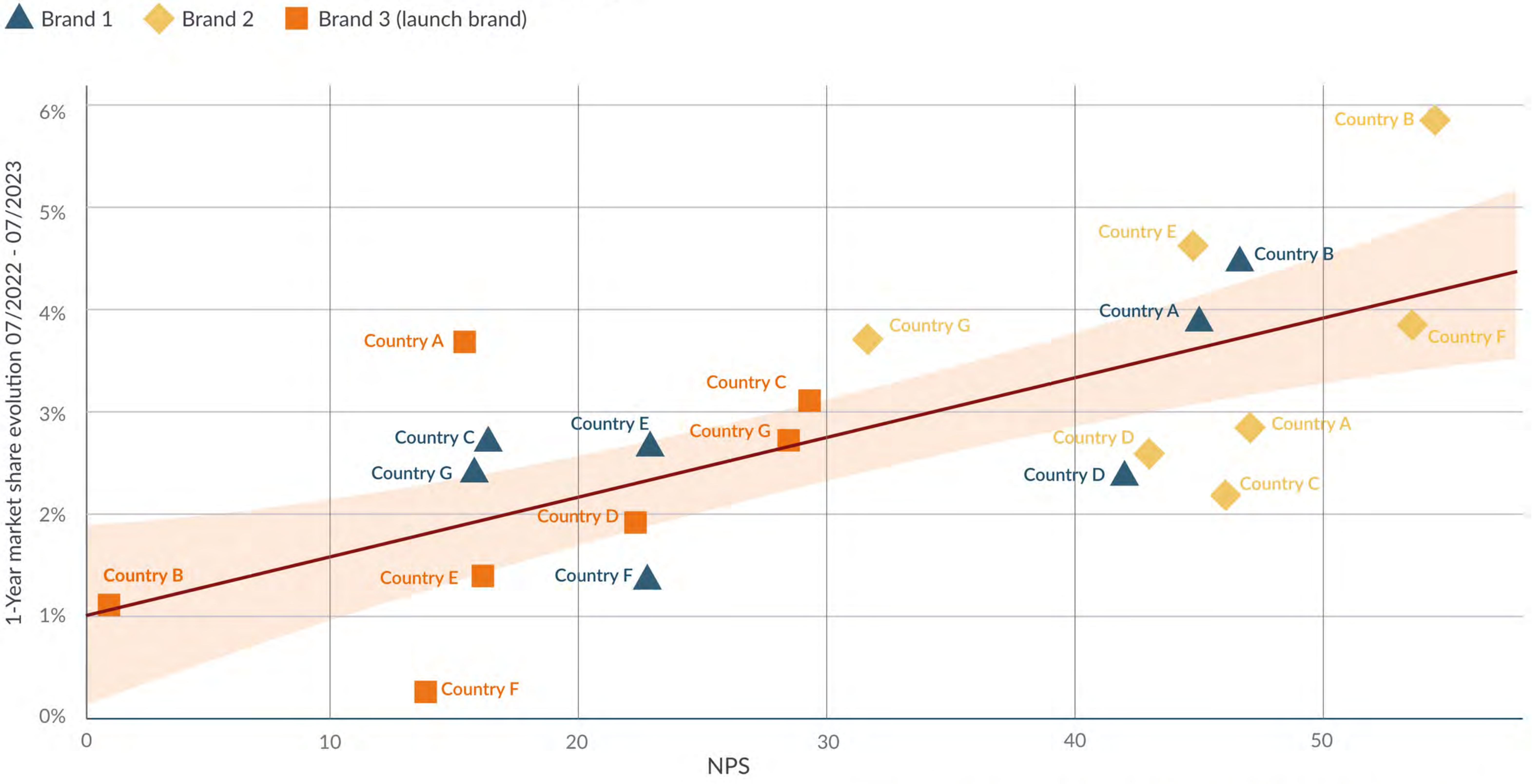
HIGHLIGHT

A HIGHER NPS CORRESPONDS TO INCREASED MARKET SHARE

In a recent collaboration with a client, we set out to test the claim that higher NPS implies not just loyal customers but also a superior revenue and/or market share evolution. Our client provided 12-month market share evolution data (Y axis) for three specialty brands (two growth brands and one recently launched product, shown in orange) across seven countries. We then plotted the brand NPS scores (adjusted for country-specific differences) from a 2023 Navigator365™ Cx Benchmark (X axis).

The chart reveals a compelling correlation between the two dimensions, particularly for the two growth brands – for the recently launched brand, the pattern is less clear for certain markets, which may be due to the small number of promoters/loyal users in the early PLC stage (worth noting that in our Navigator365™ Cx Benchmark research we often see relatively low NPS numbers for launch brands).

NPS / MARKET SHARE EVOLUTION CORRELATION - 2022-2023

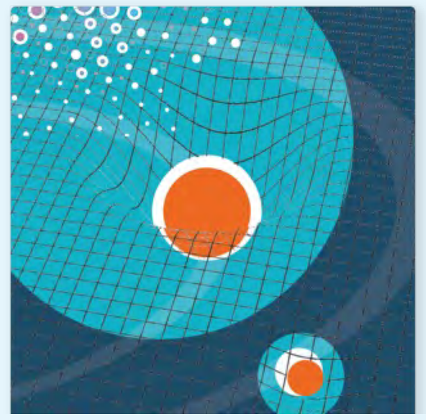


Source: Navigator365™ Cx Benchmark (n=301) and client data, 2022-2023

**Net Promoter Score (NPS) is calculated by subtracting the percentage of detractors from the percentage of promoters. Only prescribers are taken into consideration and a correction was applied to mitigate country-specific biases.*

4. INDUSTRY
performance

POWERED BY Maturometer™



OMNICHANNEL MATURITY: THE FOUR DIMENSIONS OF SUCCESSFUL CHANGE

The Across Health OC Maturity Index* gives an overall picture of the industry's performance across four key dimensions needed for successful change. Within each of the four dimensions, respondents are asked to assess their company's performance across a number of individual drivers. Those who give a 'positive' or 'extremely positive' response contribute to the overall score for each dimension out of a maximum possible 100 points. Combining these four dimension scores reflects the industry's total maturity level, quantified with a maximum aggregate score of 400.

Successful change

Concrete first steps

+

Capability to change

+

Clear vision & goals

+

Need for change

*Inspired by Dannemiller's variation of the Gleicher formula (Source: Dannemiller and Jacobs, Changing the way organizations change. A revolution of common sense. Journal of Applied Behavioural Science [1992])

INDUSTRY
performance

OMNICHANNEL MATURITY
Europe Biopharma, 2023

While there is a sense of urgency about the ***need for change*** *– to move beyond the traditional engagement model – the industry is (surprisingly) underleveraging customer insights.*

And while most respondents feel their organization has a ***clear vision for digital transformation****, the translation of that vision into a measurable multiyear strategy is often missing. In addition, leadership could be more supportive and lead by example.*

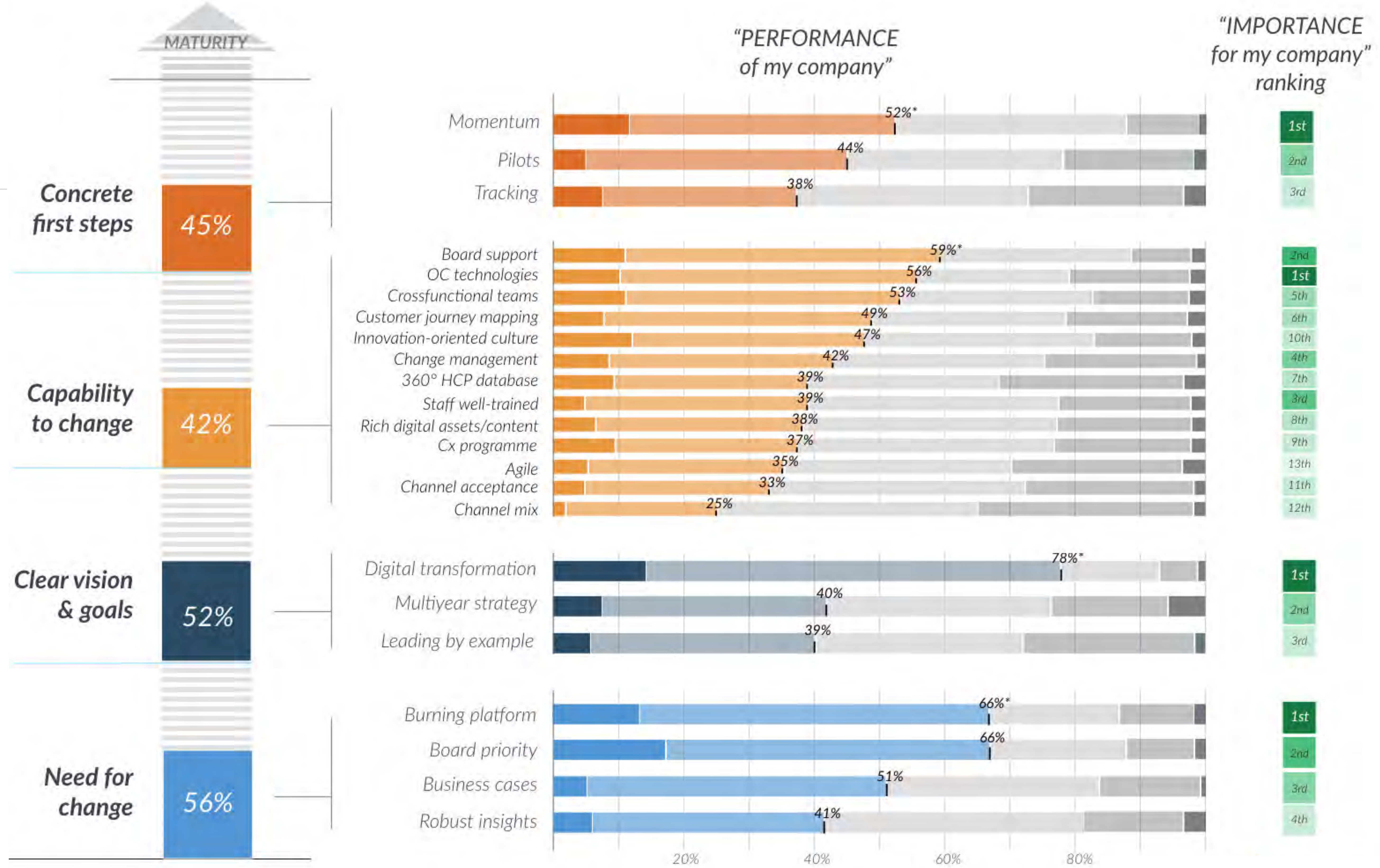
When it comes to ***'Capability to change'*** *enablers, board support, technologies and cross-functional teams show promise, but cannot outweigh weakness in Cx and channel acceptance/mix. Is the industry's capability to change being hindered by selective (over)investment in some enablers over others?*

Finally, in terms of ***concrete first steps****, the industry is struggling to translate its efforts into highly visible success stories.*

OC Maturity score

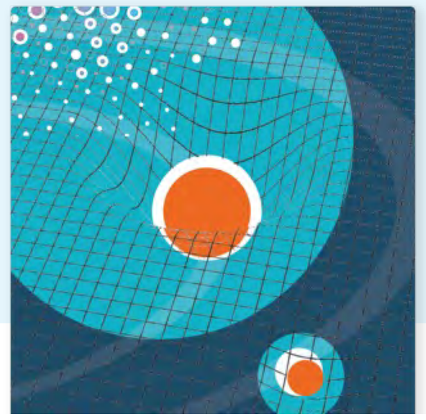
195/400

The following pages will look at each of the four dimensions (and their constituent drivers/enablers) in turn…



* Totals of Extremely positive and Positive answers are used to arrive at the index score.

Source: Maturometer^{TM} 2023, EU Biopharma (n=217)



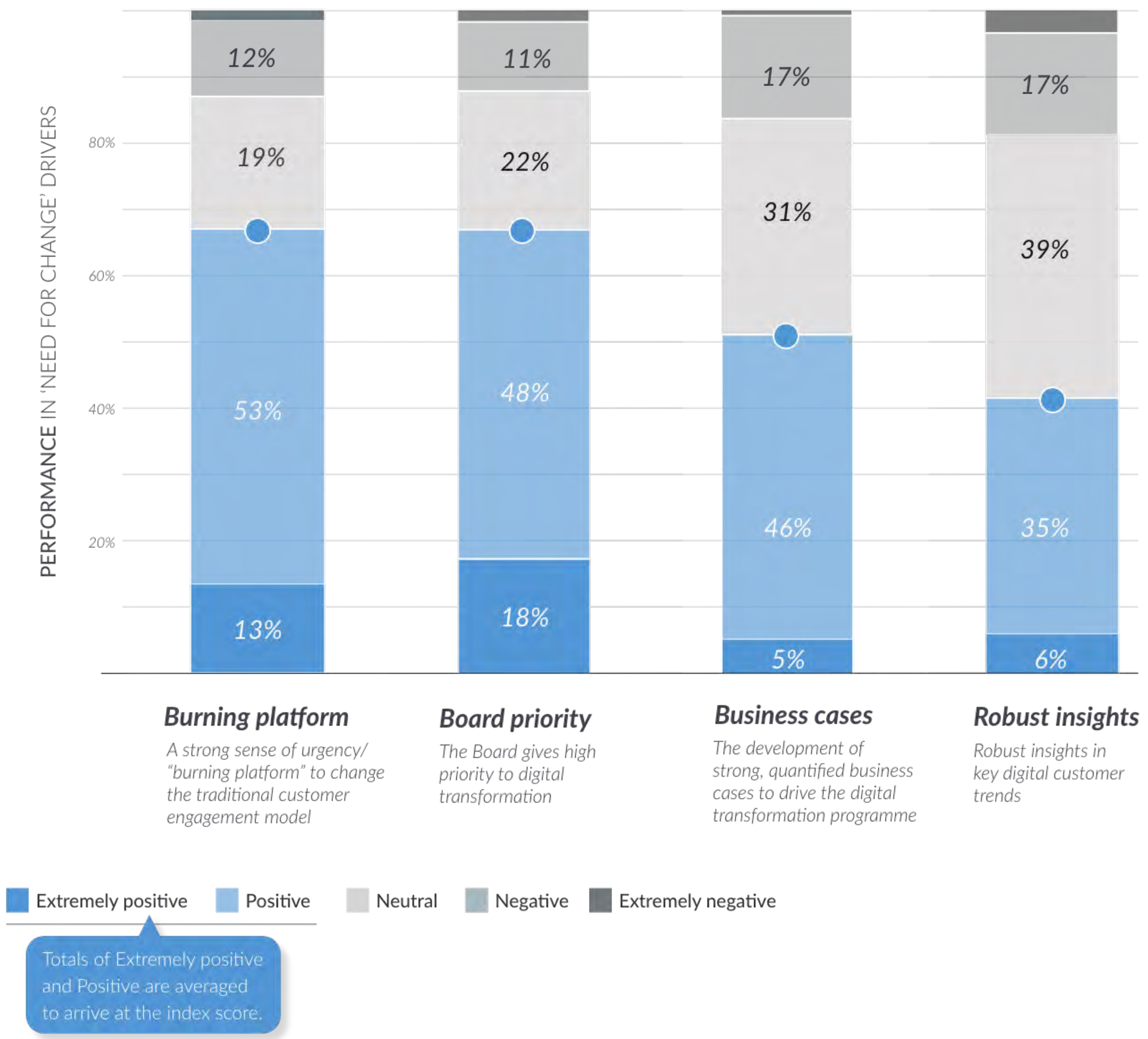
THE NEED FOR CHANGE

EU biopharma has a good sense of urgency to improve upon traditional customer engagement, coupled with prioritization at the board level. However, the lack of well-structured business cases and a failure to leverage robust customer insights are holding the industry back...at a time when customer centricity and customer experience should be a key focus.

CLEAR VISION & GOALS

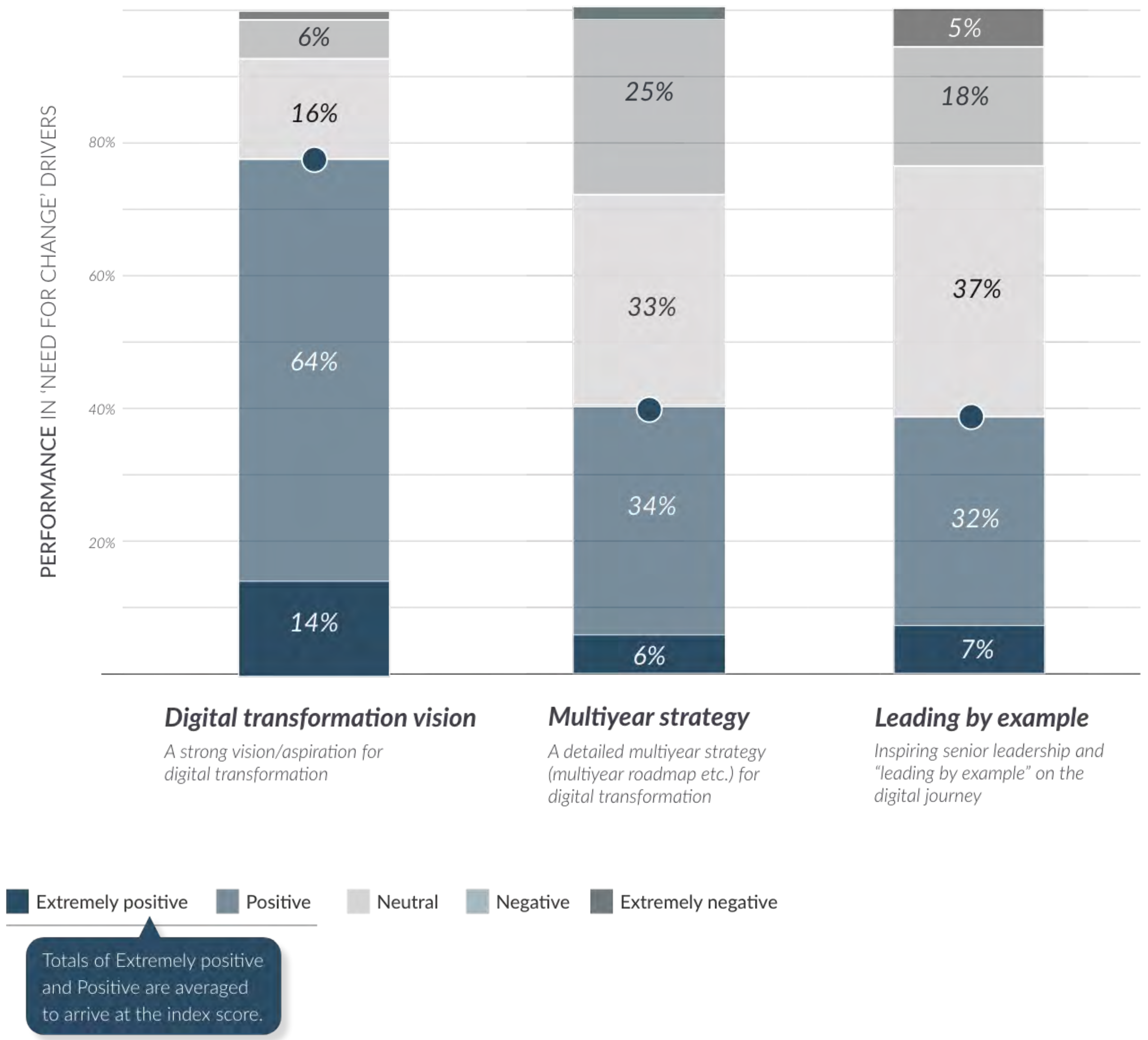
Despite a strong vision for transformation, there's a need for inspiration from senior leadership and a clear strategy.

HOW DO YOU ASSESS YOUR COMPANY'S PERFORMANCE ON THESE ***'NEED FOR CHANGE'*** *DRIVERS?*



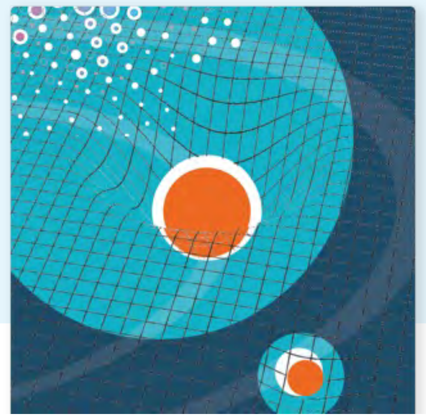
Totals of Extremely positive and Positive are averaged to arrive at the index score.

HOW DO YOU ASSESS YOUR COMPANY'S PERFORMANCE ON THESE ***'CLEAR VISION & GOALS'*** *DRIVERS?*



Totals of Extremely positive and Positive are averaged to arrive at the index score.

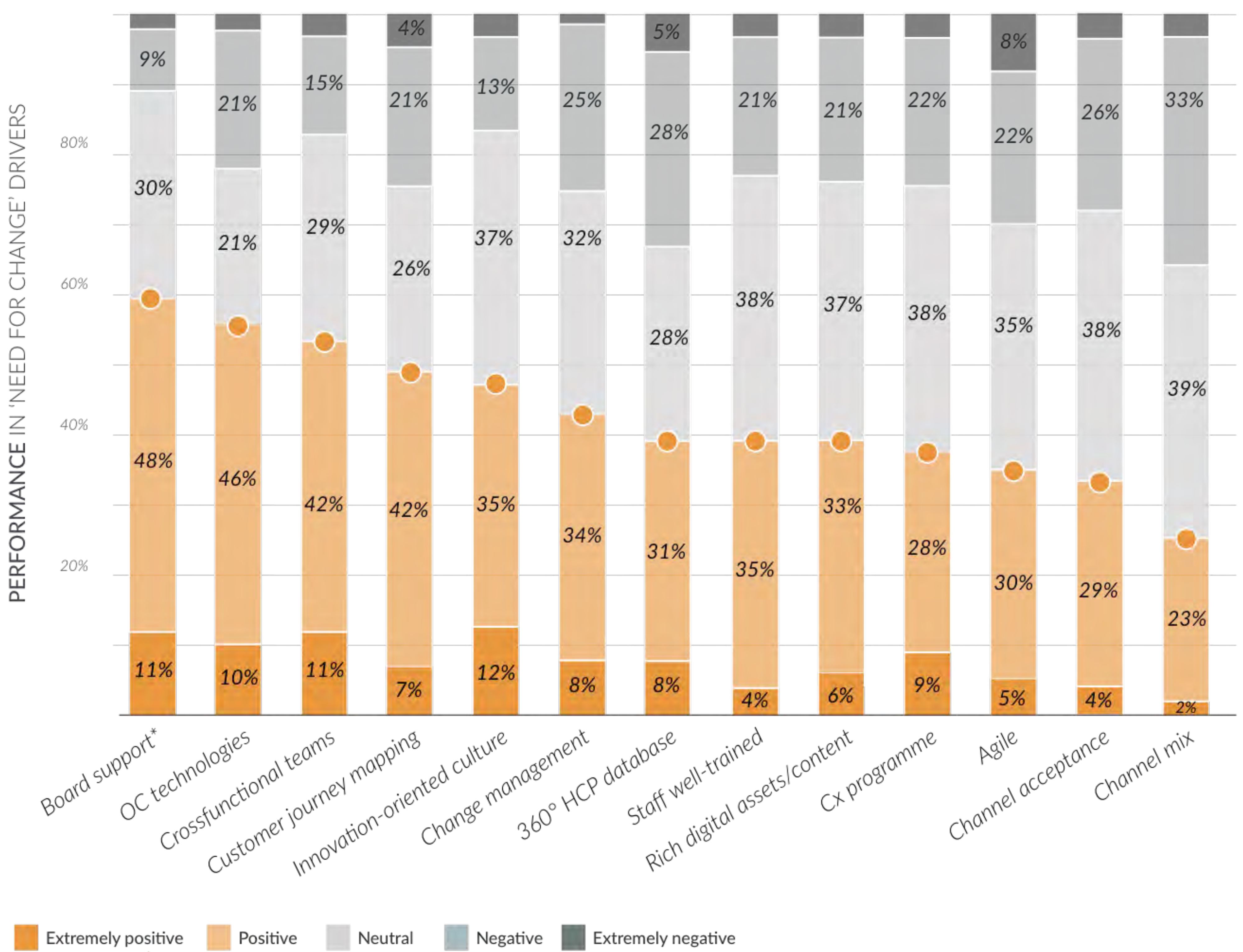
Source: Maturometer^{TM} 2023, EU Biopharma (n=217)



CAPABILITY TO CHANGE

Despite some fairly high-scoring enablers, 'Capability for change' scores the lowest of the four dimensions due to shortcomings in many elements, including staff training, channel mix & acceptance and Cx programmes.

*HOW DO YOU ASSESS YOUR COMPANY'S PERFORMANCE ON THESE **'CAPABILITY TO CHANGE'** ENABLERS?*

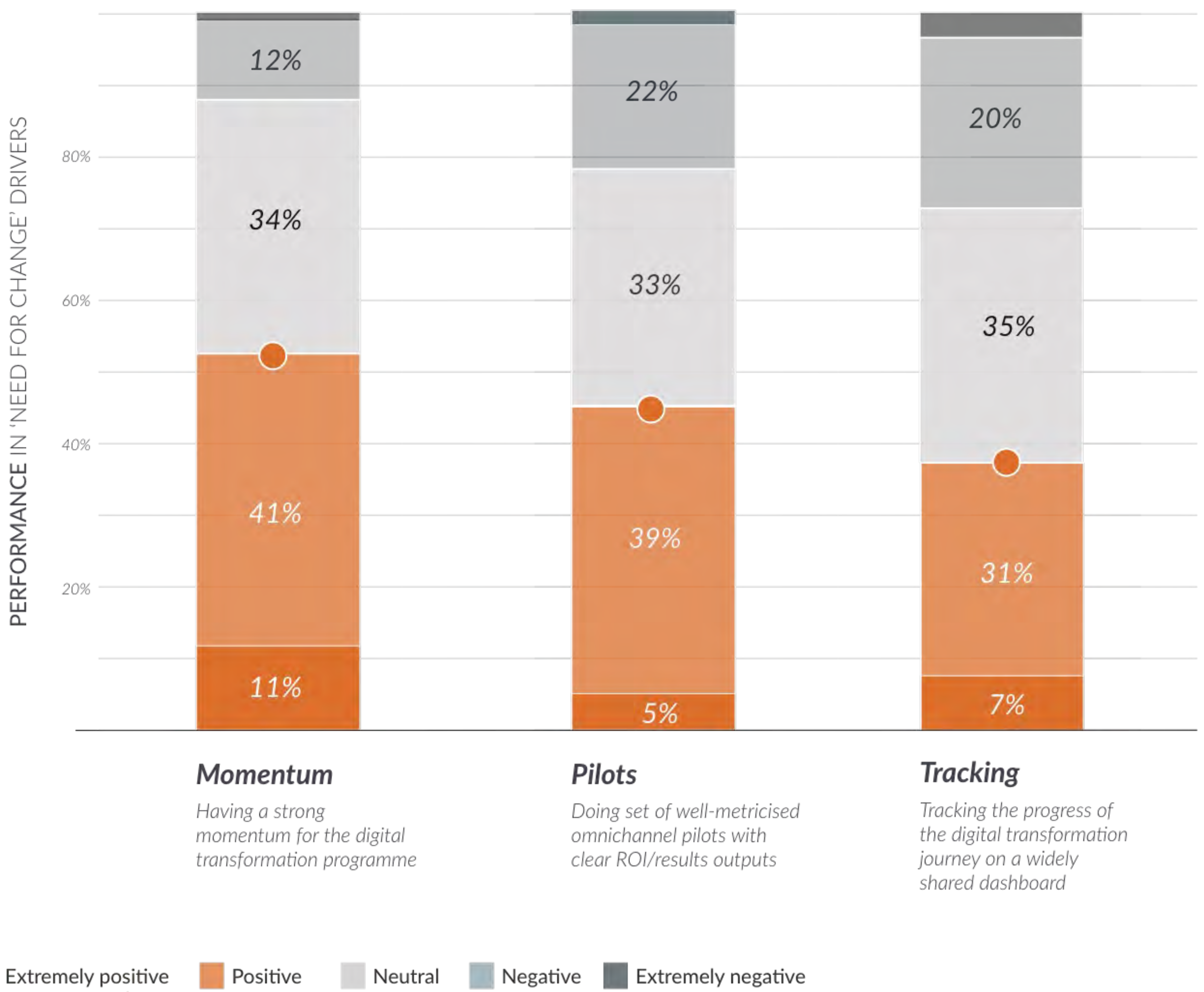


Totals of Extremely positive and Positive are averaged across all drivers

CONCRETE FIRST STEPS

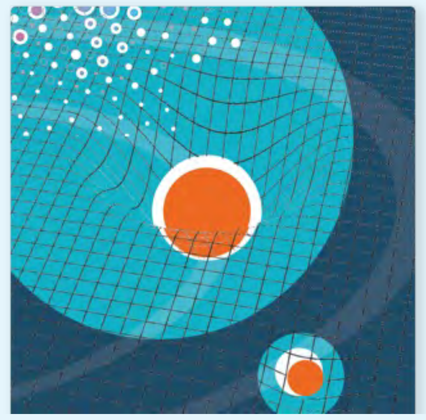
With many respondents asking for strong KPIs and ROI, robust tracking and highly measurable pilots should lead to a faster adoption (and where needed, evidence-based course correction) of any multiyear strategy...but this remains a weakness.

*HOW DO YOU ASSESS YOUR COMPANY'S PERFORMANCE ON THESE **'CONCRETE FIRST STEP'** DRIVERS?*



Totals of Extremely positive and Positive are averaged to arrive at the index score.

Source: Maturometer^{TM} 2023, EU Biopharma (n=217)



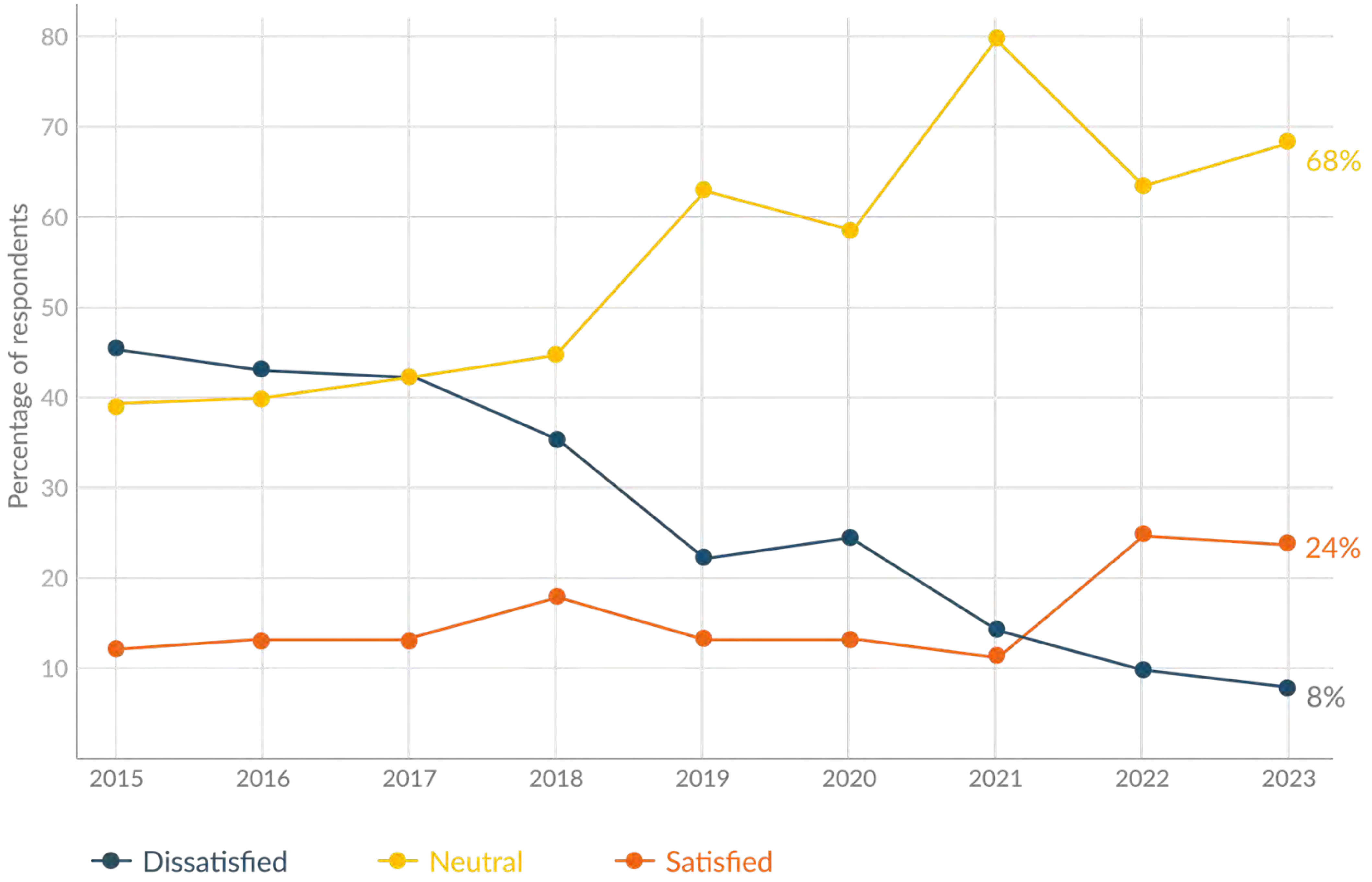
BIOPHARMA SATISFACTION WITH ITS OWN DIGITAL EFFORTS IS PLATEAUING...

After a boost in 2022, pharma staff satisfaction with their own current digital activities appears to be plateauing already – only 1 in 4 is satisfied. The segment of dissatisfied respondents has been declining since 2016 to an almost negligible 8% in 2023, but over three-quarters remain unconvinced either way.

...EVEN AS SHARE OF BUDGET HITS AN ALL-TIME HIGH

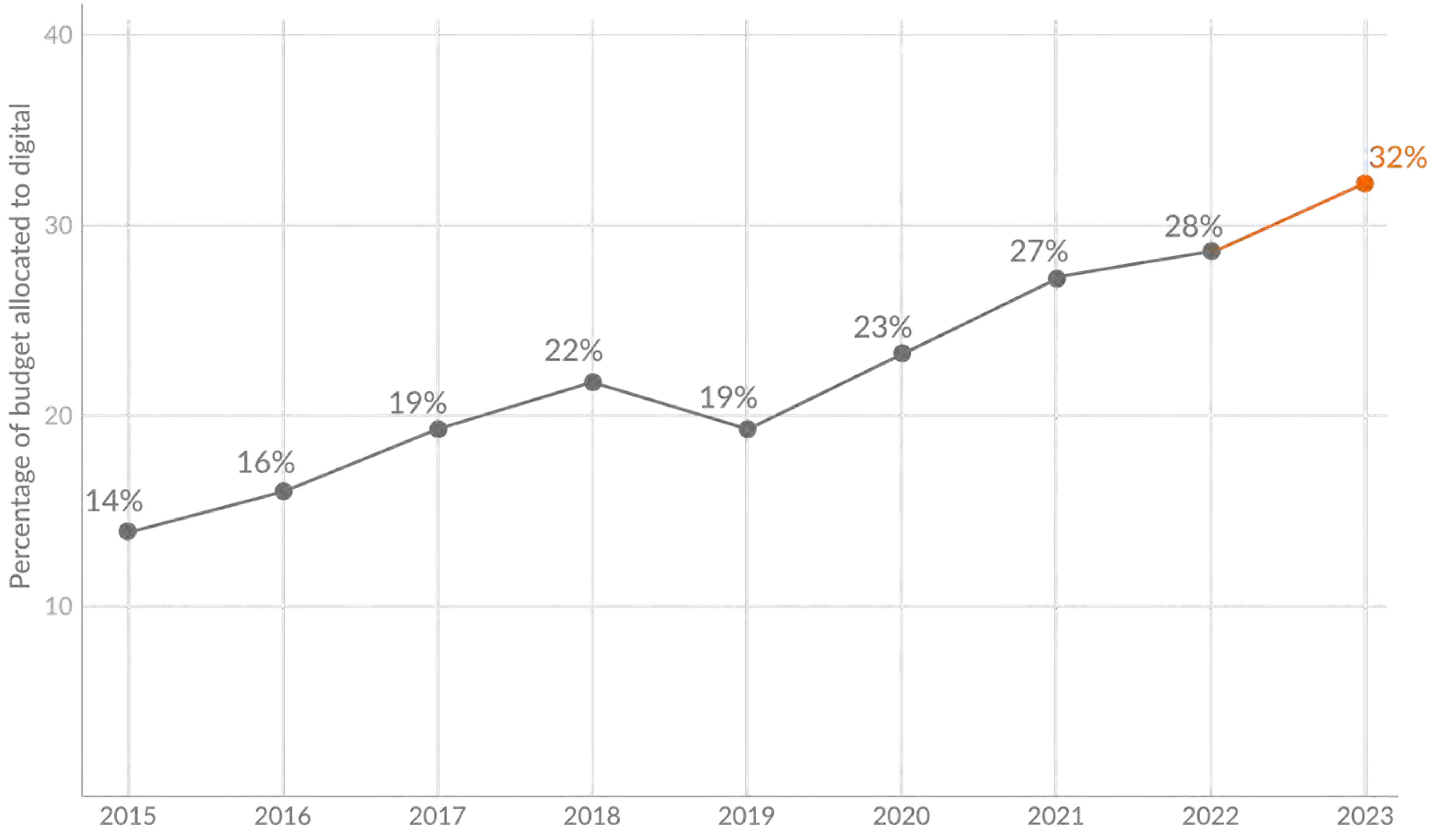
Despite digital's share of budget increasing to an all-time high of almost a third, this figure remains notably lower than the approximately 50% that B2B industries allocate to digital. So while the year-on-year increase points to a continued belief in omnichannel investment, the discrepancy vis-à-vis the B2B industry suggests that the budget allocated to digital efforts might not be sufficient to achieve the desired customer impact (as the plateauing HCP satisfaction we saw earlier would seem to suggest). This confirms there is still significant room for improvement. Perhaps budgets are partly spent on the wrong things, at the expense of key success factors like customer insights, channel mix, measurement, skills etc?

Q: How satisfied are you with your current digital/omnichannel activities?

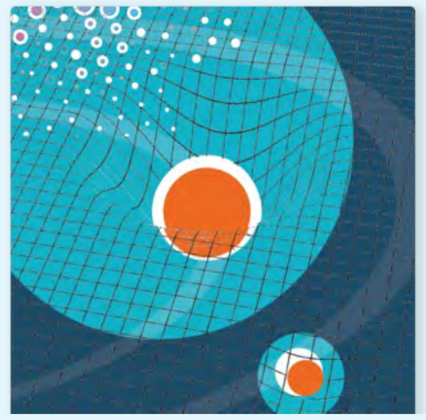


Source: Maturometer™ 2023, EU Biopharma (n=217)

Q: What percentage of this year's marketing budget was allocated to digital initiatives?



Source: Maturometer™ 2023, EU Biopharma (n=217)

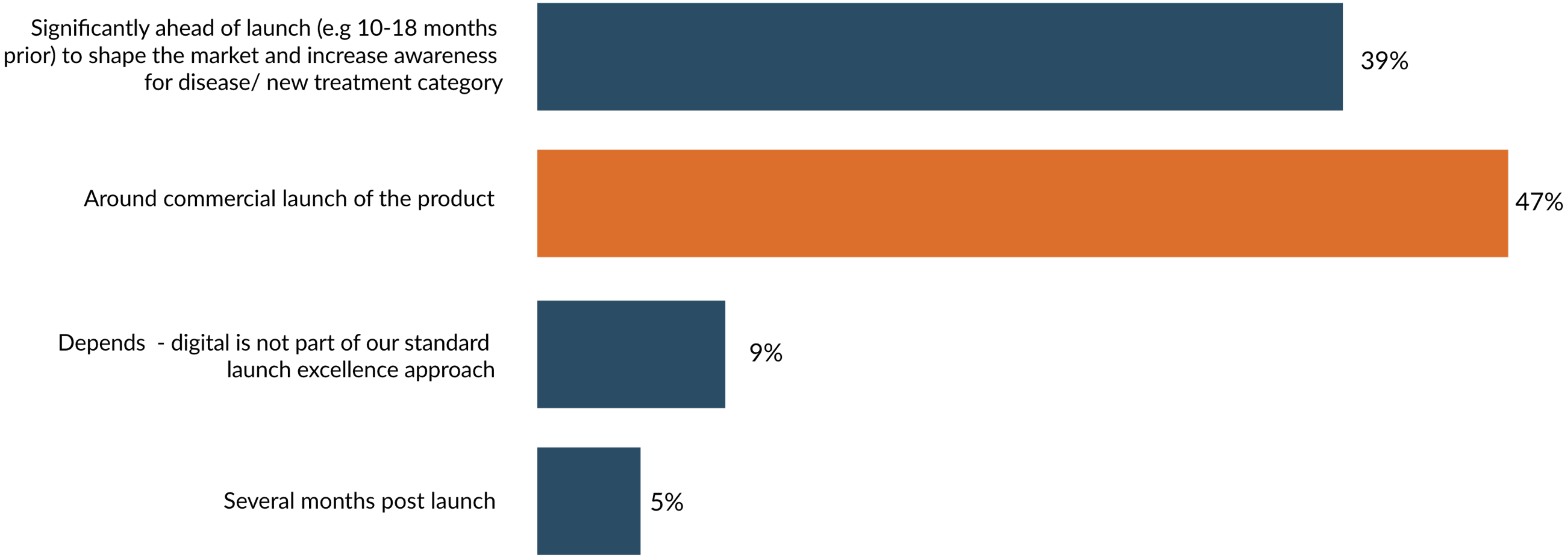


HIGHLIGHT

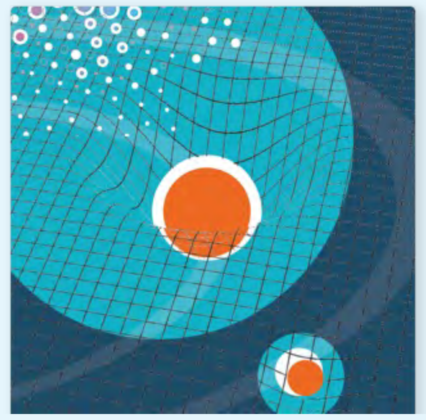
FEWER THAN 40% OF EUROPEAN BIOPHARMA COMPANIES INITIATE THEIR DIGITAL ACTIVITIES SIGNIFICANTLY AHEAD OF LAUNCH

Despite the critical importance of the pre-launch window (with around a third of specialists interested in engaging with biopharma at this early stage), only 39% of European biopharma respondents say they start their digital activities significantly ahead of launch. In addition, starting the planning early does not imply that actual omnichannel touchpoints already occur well before launch… indeed, omnichannel engagement planning would need to start even earlier in order to be ready to reach customers in the pre-launch phase.

Q: When does your company normally start with digital activities to support the launch of a product?



Source: Maturometer™ 2023, EU Biopharma (n=155)

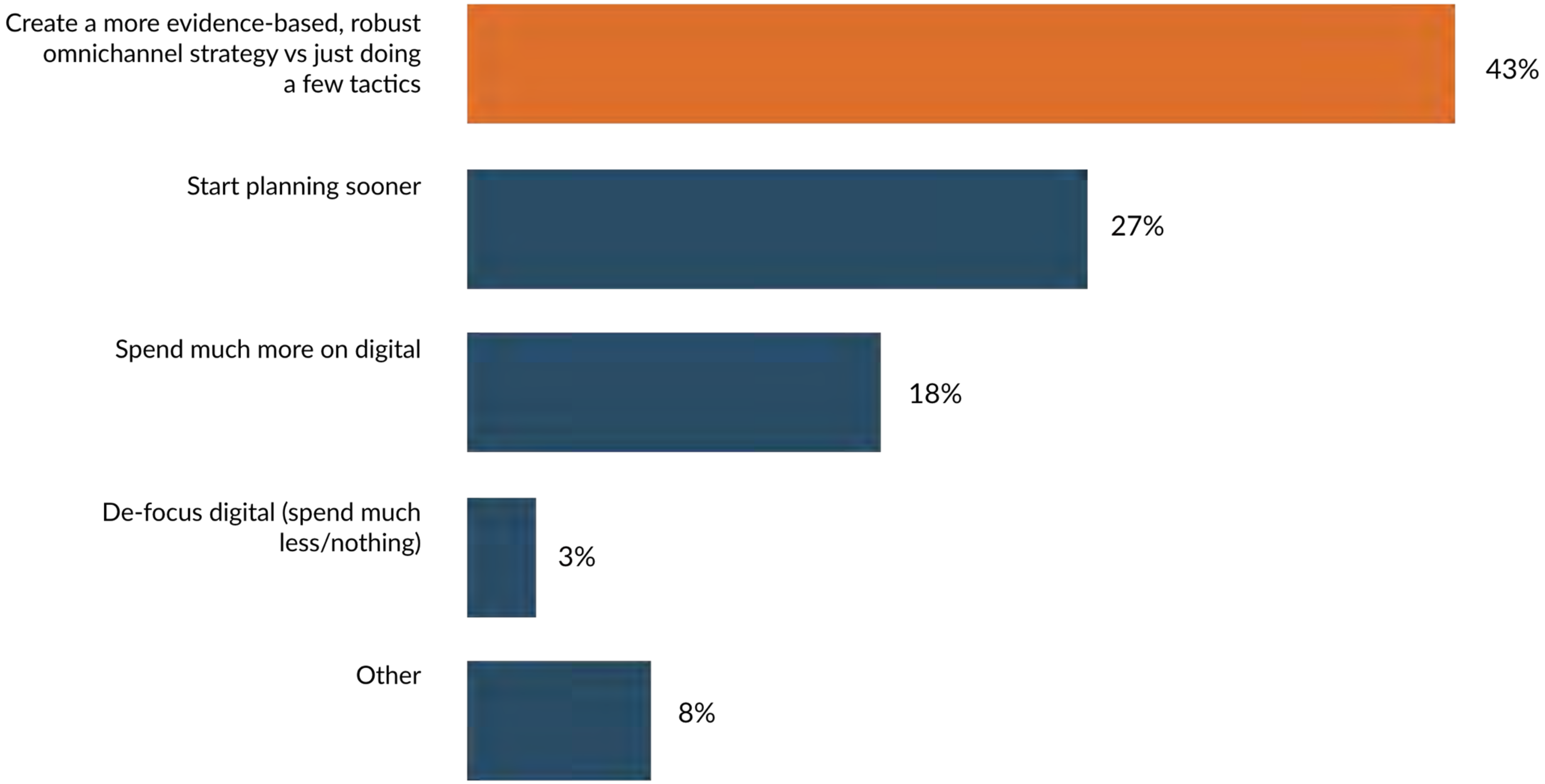


HIGHLIGHT

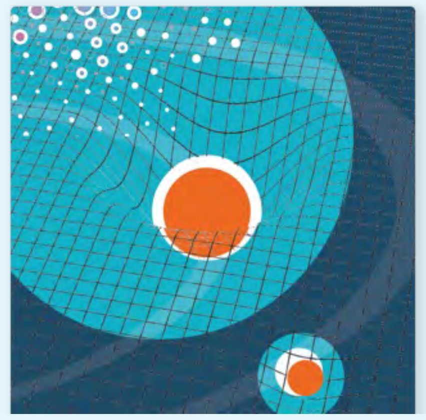
BIOPHARMA PLANS TO LISTEN MORE TO WHAT THEIR CUSTOMERS WANT AT LAUNCH

As biopharma continues to see omnichannel mix planning as a key challenge, leveraging fresh evidence-based customer trends is key to success for any phase in the product lifecycle – and even more so in the critical peri-launch phase. What is reassuring is that 43% plan to utilize customer channel affinity research to inform their future planning, while the second and third focus areas “start planning sooner” and “spend more on digital” should come as no surprise in view of the earlier Navigator365™ Core launch insights.

Q: What do you plan to do differently for your next launch?



Source: Maturometer™ 2023, EU Biopharma (n=155)



HIGHLIGHT

WHILE OVERALL DIGITAL MARKETING BUDGETS CONTINUE TO RISE, MOST RESPONDENTS SPEND (MUCH) LESS THAN 30% ON DIGITAL IN A LAUNCH CONTEXT

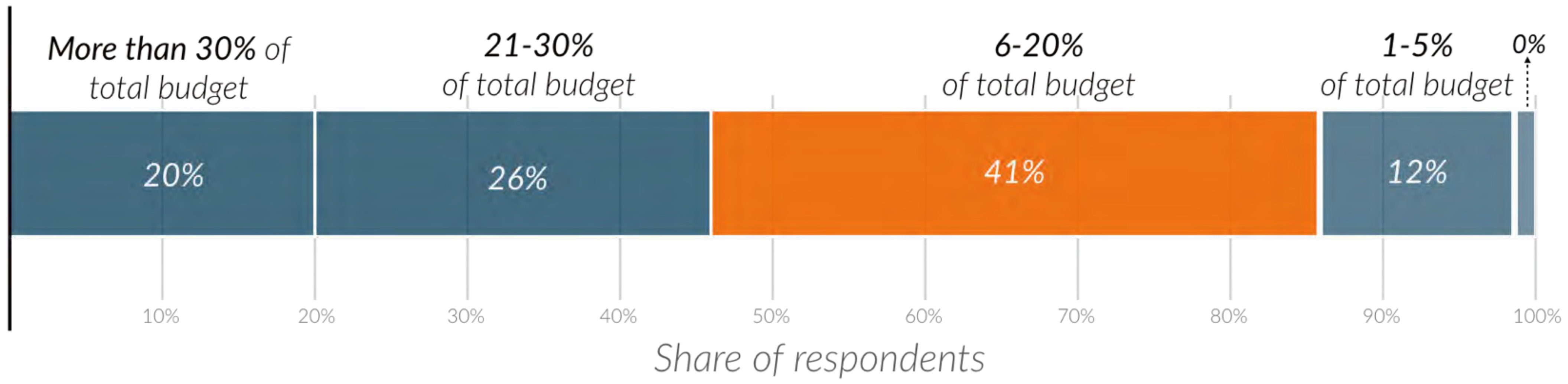
The industry has a significant opportunity to augment its F2F engagements around launch with a robust mix of medical and commercial digital activities – in particular, omnichannel is ideal for data dissemination and disease education prior to launch, with the aim of advancing potential future prescribers on the knowledge ladder before commercial can enter the picture. Yet the importance of this does not seem to be reflected at all in the share of total launch budgets allocated to digital elements – and remains at odds with the trend for larger overall digital spend seen earlier.

HIGHLIGHT

ONLY A THIRD OF NATIONAL/LOCAL TEAMS ARE GETTING RELEVANT DIGITAL LAUNCH SUPPORT FROM HQ

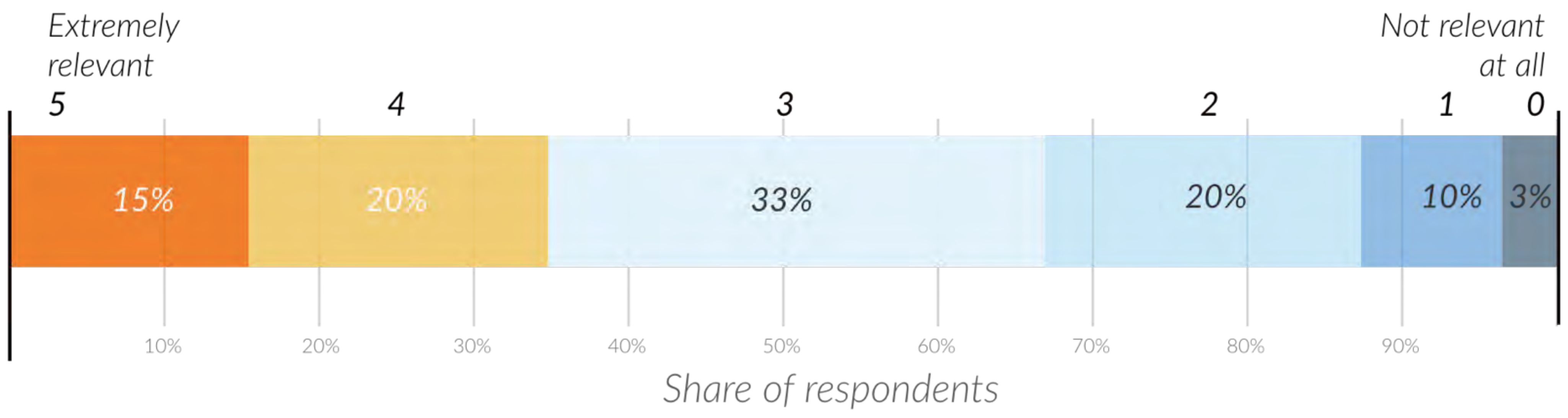
Our data show that very little of the digital content provided by Global/Regional is being leveraged by local markets (less than 20% say they utilize at least half of digital content from HQ – *data not shown here*). So it is perhaps no surprise to learn that, when it comes to digital support for launches, only 35% of respondents view the support they get from Global as relevant to their local market. Hopefully the plans for an earlier, strongly integrated cocreation of assets and campaigns will be reflected in improved relevance in next year's survey.

Q: How important is the digital component of your launch brands?

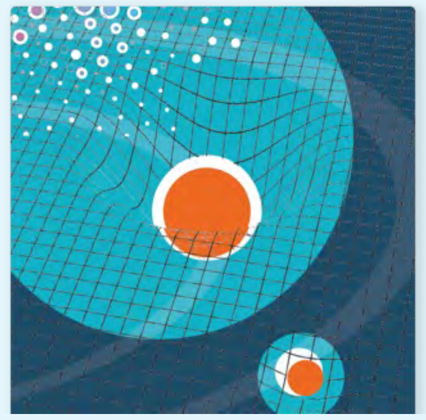


Source: Maturometer™ 2023, EU Biopharma (n=155)

Q: How relevant is the digital launch support from headquarters for your own market?



Source: Maturometer™ 2023, EU Biopharma (n=155)

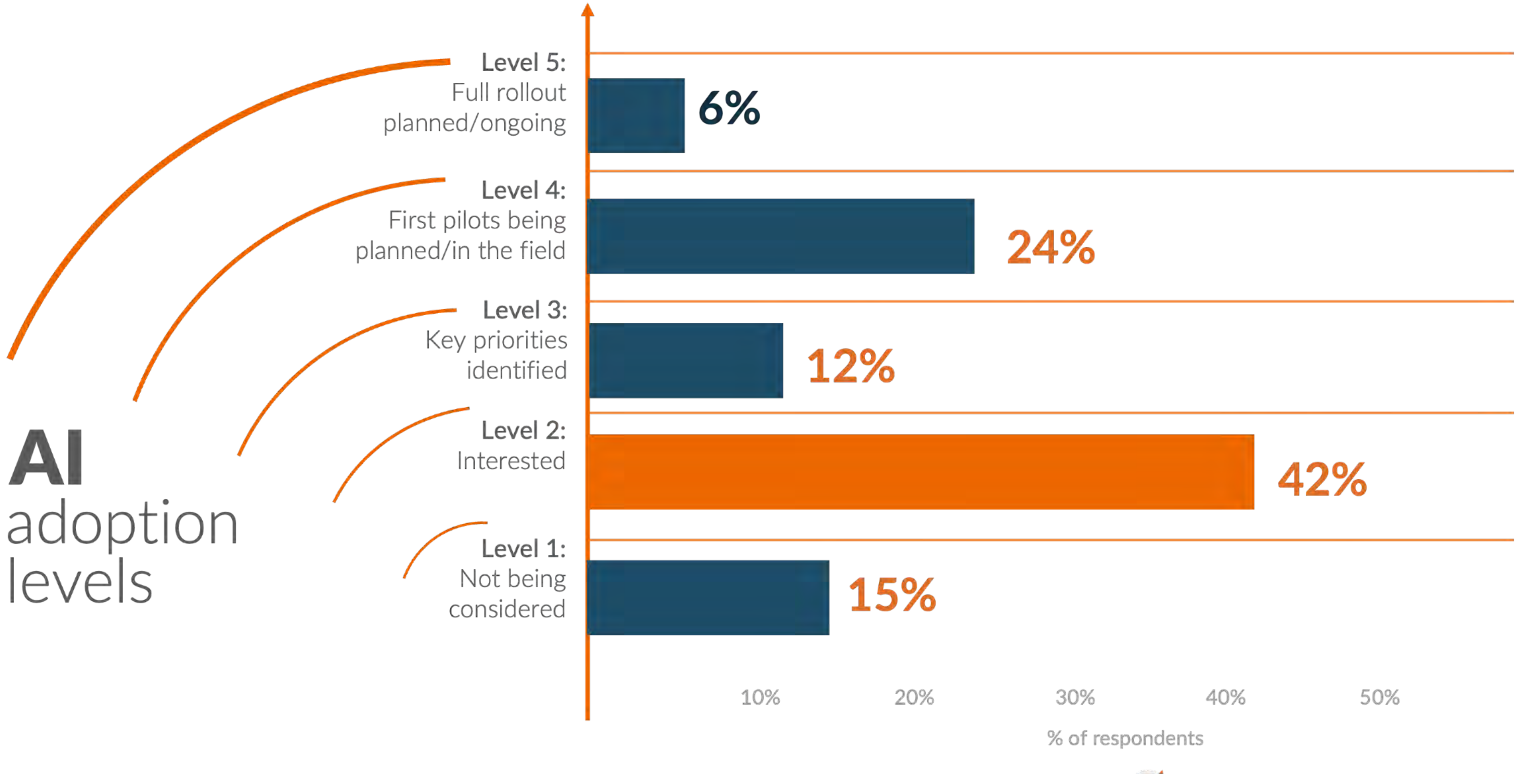


HIGHLIGHT

WHAT'S BIOPHARMA'S LEVEL OF INTEREST IN AI?

When asked "What's the current level of adoption of AI in your company's customer engagement efforts?" only 15% of European biopharma respondents reported no interest at all in AI in their organization. In fact, the data indicate a strong inclination to incorporate AI in customer engagement efforts – though so far just under a third have progressed as far as pilots and beyond. Of these 30%, only 6% state that their AI initiatives are fully underway, with the remaining 24% having pilots either already in the field or still in the planning stage.

What's the current level of adoption of AI in your company's customer engagement efforts?



Source: Maturometer™ 2023, EU Biopharma (n=217)

5. CHANNEL
metrics

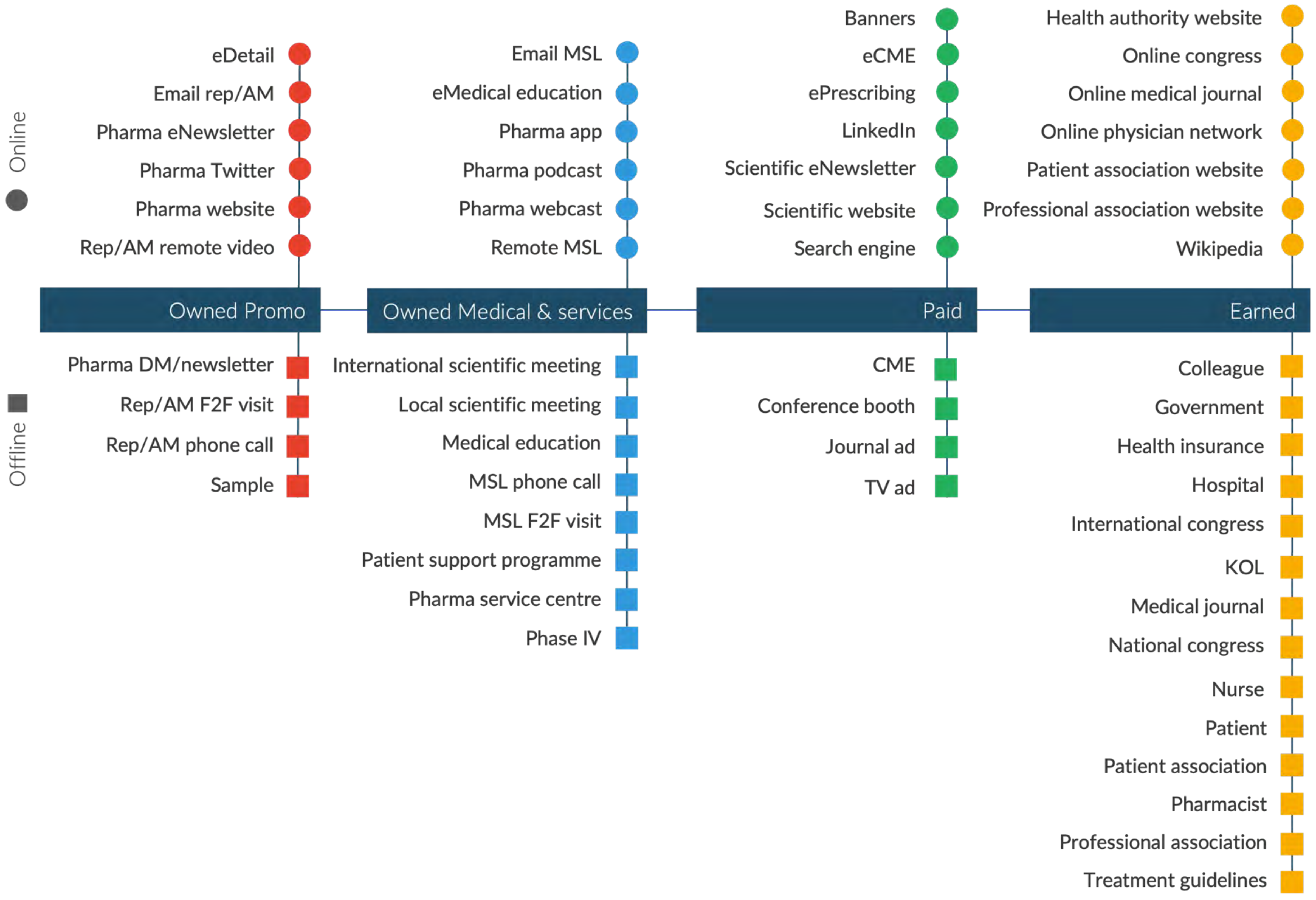
POWERED BY Navigator365™ Core

CHANNEL
metrics

ACROSS HEALTH NAVIGATOR365™ CORE

Channels come in many shapes and forms: push-pull, online-offline, social, mobile, etc... Forrester created an insightful framework, where channels are categorized as either owned, paid, or earned. Navigator365™ Core leverages this framework, translates it to the pharma context and adds key offline channels to the digital set, making this a second-to-none omnichannel research in life sciences. Since the research began in 2013, over 65,000 HCPs have been surveyed.

The 50+ channels include:



● Online

■ Offline

Owned Promo

- Online: eDetail, Email rep/AM, Pharma eNewsletter, Pharma Twitter, Pharma website, Rep/AM remote video
- Offline: Pharma DM/newsletter, Rep/AM F2F visit, Rep/AM phone call, Sample

Owned Medical & services

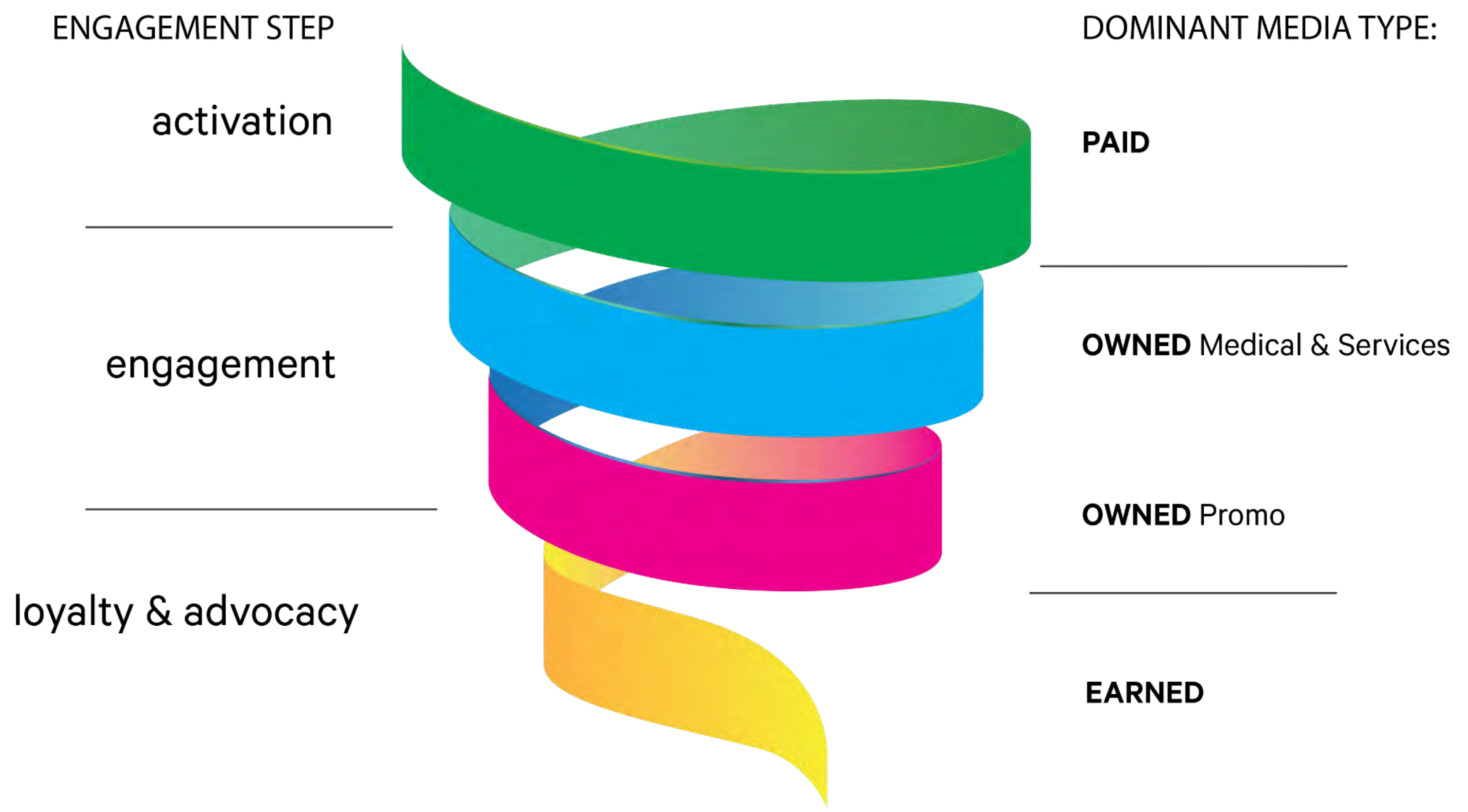
- Online: Email MSL, eMedical education, Pharma app, Pharma podcast, Pharma webcast, Remote MSL
- Offline: International scientific meeting, Local scientific meeting, Medical education, MSL phone call, MSL F2F visit, Patient support programme, Pharma service centre, Phase IV

Paid

- Online: Banners, eCME, ePrescribing, LinkedIn, Scientific eNewsletter, Scientific website, Search engine
- Offline: CME, Conference booth, Journal ad, TV ad

Earned

- Online: Health authority website, Online congress, Online medical journal, Online physician network, Patient association website, Professional association website, Wikipedia
- Offline: Colleague, Government, Health insurance, Hospital, International congress, KOL, Medical journal, National congress, Nurse, Patient, Patient association, Pharmacist, Professional association, Treatment guidelines



ENGAGEMENT STEP

activation

engagement

loyalty & advocacy

DOMINANT MEDIA TYPE:

PAID

OWNED Medical & Services

OWNED Promo

EARNED

Channel – and content – types can be more or less aligned with stages in the customer journey, although several channels can be leveraged across more than one stage – take, for instance, the pharma website, which can be instrumental in the activation, engagement and loyalty & advocacy stages.

DISPLAY (BANNER) ADVERTISING

Using sophisticated targeting methods, display advertising continues to be of relevance when fully integrated into your overall customer engagement strategy. The data show that the impact of banner advertising is higher among European and APAC HCPs, where reach is lowest. The US shows the exact opposite, with the lowest impact among the three regions – perhaps not surprising considering the sheer volume of biopharmaceutical advertising in this market.

n=1956

Banner		Rep
29%	... reach versus...	57%
4.2	... impact versus...	6.3
3.1	...days between contact versus...	4.6

EU5

n=4031

Banner		Rep
19%	... reach versus...	59%
5.4	... impact versus...	6.7
3.8	...days between contact versus...	5.8

APAC

n=661

Banner		Rep
18%	... reach versus...	58%
5.9	... impact versus...	6.6
4.8	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023

SEARCH ENGINE MARKETING

With search engine marketing, you need to make sure you can be found – because if you can't be found, you may just as well not exist! Perhaps unsurprising for a very online market, reach is highest among APAC HCPs – this is the only region where this channel has a higher reach (and impact) than the rep – while frequency is identical between the three regions.

n=1956

Search engine		Rep
52%	... reach versus...	57%
6.1	... impact versus...	6.3
1.9	...days between contact versus...	4.6

EU5

n=4013

Search engine		Rep
52%	... reach versus...	59%
6.7	... impact versus...	6.7
1.8	...days between contact versus...	5.8

APAC

n=661

Search engine		Rep
62%	... reach versus...	58%
7.1	... impact versus...	6.6
1.8	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023

EMEDICAL

Leading biopharma companies continue to increase their investment in eMedical channels, such as eMedical education and webcasts, resulting in higher reach and impact. As medical content lends itself very well to digitization and personalization, this trend will continue, and physicians will increasingly favour companies that offer them a strong omnichannel medical experience.

n=1956

eMedical education	Webcast		MSL
15%	22%	... reach versus...	39%
5.9	6.7	... impact versus...	6.7
12.0	10.9	...days between contact versus...	13.4

EU5
n=4013

eMedical education	Webcast		MSL
23%	35%	... reach versus...	40%
7.0	7.1	... impact versus...	7.1
11.7	14.5	...days between contact versus...	13.3

APAC
n=796

eMedical education	Webcast		MSL
25%	36%	... reach versus...	32%
6.6	6.7	... impact versus...	6.9
9.0	15.0	...days between contact versus...	10.7

Source: Navigator365™ Core, all specialists, 2023

OMNICHANNEL MSL

MSLs provide a critical service to HCPs and thought leaders, in terms of data dissemination and advanced education – and smart integration of digital channels within the mix enables MSLs to focus their in-person visits where they really matter.

n=1956

Remote MSL	MSL email		MSL
18%	32%	... reach versus...	39%
6.4	5.6	... impact versus...	6.7
10.8	8.5	...days between contact versus...	13.4

EU5
n=4031

Remote MSL	MSL email		MSL
22%	33%	... reach versus...	40%
7.0	6.1	... impact versus...	7.1
12.6	7.8	...days between contact versus...	13.3

APAC
n=661

Remote MSL	MSL email		MSL
20%	23%	... reach versus...	32%
6.6	5.9	... impact versus...	6.9
9.2	7.4	...days between contact versus...	10.7

Source: Navigator365™ Core, all specialists, 2023

OMNICHANNEL REP

Omnichannel rep engagement can lead to increased efficiency and effectiveness for biopharma, as well as a superior customer experience. Nevertheless, despite the high impact scores that are almost comparable to in-person visits, remote detailing has not gained further traction post-pandemic, as the relatively low reach numbers indicate (APAC performing slightly better here). Conversely, rep email has a higher reach but a lower impact. Finally, the combination of rep email and the age-old self-detailing channel can be a great alternative to remote or F2F engagement, but remains significantly underleveraged.

	Remote detailing	Rep email	Self-detailing		Rep
n=1956	17%	35%	18%	... reach versus...	57%
	5.9	5.0	6.2	... impact versus...	6.3
	7.3	6.1	7.2	...days between contact versus...	4.6
EU5 n=4031	19%	45%	14%	... reach versus...	59%
	6.5	5.6	6.8	... impact versus...	6.7
	8.9	5.2	7.2	...days between contact versus...	5.8
APAC n=661	26%	31%	13%	... reach versus...	58%
	6.4	5.7	6.4	... impact versus...	6.6
	9.1	6.5	5.6	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023

MOBILE ENGAGEMENT

With few companies having adopted a 'mobile-first' strategy, there's still ample opportunity to take advantage of the full mobile spectrum. The potential benefits are enormous as mobile activities continue to evolve and hold the potential to change almost every part of the biopharma industry they touch. Nevertheless, fewer than 20% of HCPs are exposed to pharma-owned mobile apps (APAC, renowned as a 'mobile first' region, is where this channel seems to be making the most progress, albeit with lower frequency). Importantly, for these relatively small but engaged HCP audiences, the impact of this channel is remarkably similar across all four markets – and higher than the rep.

	Smartphone app		Rep
n=1956	11%	... reach versus...	57%
	6.5	... impact versus...	6.3
	3.6	...days between contact versus...	4.6
EU5 n=4031	13%	... reach versus...	59%
	6.8	... impact versus...	6.7
	3.9	...days between contact versus...	5.8
APAC n=661	19%	... reach versus...	58%
	6.8	... impact versus...	6.6
	6.1	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023

EMAIL ENGAGEMENT

Email is an essential part of every company's communication mix. Next to rep and MSL email (see previous pages), biopharma also leverages eNewsletters (the owned channel – in addition to 3rd-party eNewsletters). This channel tends to be owned by marketing (or, increasingly, medical) and has a similar impact as rep email (but lower vs MSL email). At the same time, reach tends to be lower, particularly in the US. Getting the balance right between the different types of email and offline communications remains a challenge in a truly customer-oriented, omnichannel world.

n=1956

eNewsletter		Rep
25%	... reach versus...	57%
5.1	... impact versus...	6.3
6.3	...days between contact versus...	4.6

EU5
n=4031

eNewsletter		Rep
39%	... reach versus...	59%
5.4	... impact versus...	6.7
4.8	...days between contact versus...	5.9

APAC
n=661

eNewsletter		Rep
33%	... reach versus...	58%
5.4	... impact versus...	6.6
7.4	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023

WEBSITE ENGAGEMENT

The website should be the heart of any omnichannel strategy – the hub to which all other engagement activities throughout the customer journey are linked. Nevertheless, reach and impact remain much and somewhat lower, respectively, than the rep (in most B2B industries, these two metrics are higher). Hence, there is still a lot of opportunity to tap into this key channel in biopharma… across all regions. A truly self-service platform where medical, commercial, customer service and access come together remains rare in biopharma, but is clearly the future.

n=1956

Website		Rep
35%	... reach versus...	57%
5.6	... impact versus...	6.3
7.0	...days between contact versus...	4.6

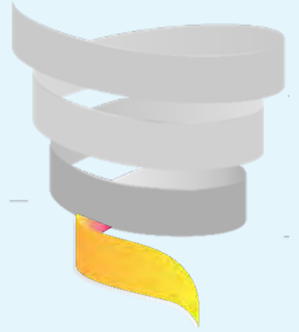
EU5
n=4031

Website		Rep
28%	... reach versus...	59%
6.1	... impact versus...	6.7
6.2	...days between contact versus...	5.8

APAC
n=661

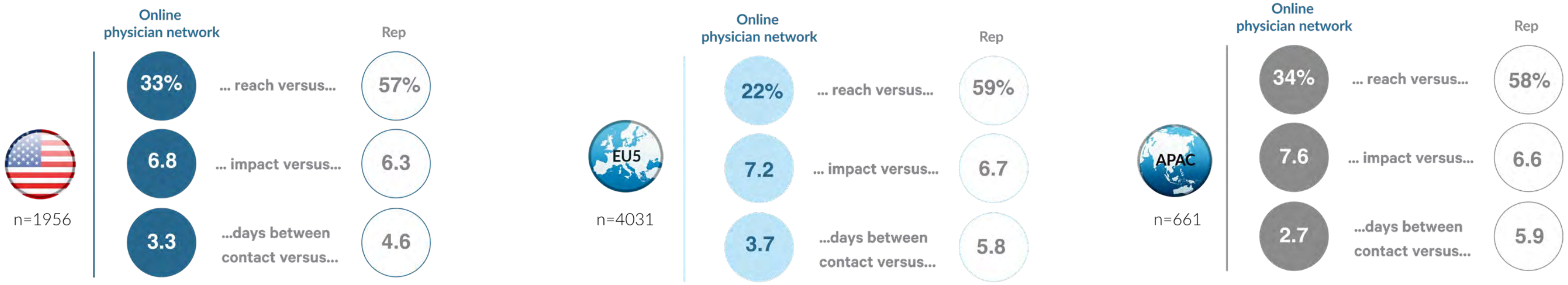
Website		Rep
35%	... reach versus...	58%
6.2	... impact versus...	6.6
6.1	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023



SOCIAL MEDIA ENGAGEMENT (ONLINE PHYSICIAN NETWORKS)

While traditional marketing tactics are mostly one-way, social media marketing can be two-way. Like most earned channels, the impact of the online physician network is high and surpasses that of the rep across all three markets, but particularly so in APAC, where this channel carries a lot of influence when it comes to HCPs' clinical decision making.



n=1956

Online physician network		Rep
33%	... reach versus...	57%
6.8	... impact versus...	6.3
3.3	...days between contact versus...	4.6

EU5
n=4031

Online physician network		Rep
22%	... reach versus...	59%
7.2	... impact versus...	6.7
3.7	...days between contact versus...	5.8

APAC
n=661

Online physician network		Rep
34%	... reach versus...	58%
7.6	... impact versus...	6.6
2.7	...days between contact versus...	5.9

Source: Navigator365™ Core, all specialists, 2023

How we
can help you

PRODUCTS

SERVICES

CONTACTS

About
ACROSS HEALTH

Across Health offers **end-to-end omnichannel consulting services – built on a robust evidence base –** to boost your customer engagement

ACROSS HEALTH

a precision value & health team

Discover how **our strategic consulting services** can help you develop a dynamic and executable omnichannel customer engagement strategy **that puts the customer at the centre of every interaction.**

Our **interactive and engaging workshops** offer a hands-on approach, bringing our proprietary data to life and offering unique insights and actionable strategies tailored to your brand's specific challenges and opportunities.

Co-create your own transformative journey with the support of our expert guidance and exclusive data insights.

www.across.health/ecosystem

Insight

- Understand & validate:
  - brand strategic imperatives
  - treatment flow, leverage points
  - customer/stakeholder segmentation
- Channel/content/media insights
- Benchmarking
- Company digital maturity & resources

Innovation strategy

- Customer journey definition
- Channel/content/context/media selection and prioritization
- Campaign strategy & programme planning
- Business case calculation
- KPI framework development
- Workshops & capability building

Intelligent execution

- Programme management, coaching & change management
- Content creation management
- Opt-in strategy
- Campaign orchestration & automation
- Self-service "execution at scale" package for affiliates

Impact

- Real-time 360° dashboard solutions
- Tracking of engagement KPIs
- Predictive analytics
- Pre/peri/post KPI & ROI analysis
- Continuous recommendations for optimization

FRAMEWORKS & SERVICES

- Maturity assessment (Maturometer™)

- Digital transformation strategy
- Omnichannel customer-centric strategy
- Omnichannel Launch Excellence

- Omnichannel campaign execution

- Impact measurement
- Dashboards
- Predictive analytics

PRODUCTS

Navigator365™

Navigator365™ **Cx Benchmark** → Navigator365™ **Core** / Navigator365™ **Payer** → Navigator365™ **Planner** → Navigator365™ **Tracker**

Omnitopia™

Navigator365™

The **Navigator365™ platform** is the centrepiece of our proprietary data offering. It provides the insights, evidence and tools needed to plan, execute and measure an effective evidence-based omnichannel customer engagement strategy.

- Covers over 50 on- and offline channels (owned, paid and earned)
- Trusted by more than 50 life science companies in over 40 countries

Uniquely actionable research
for omnichannel customer engagement
& resource optimization

Navigator365™ Core

Navigator365™ Core collates our research on the omnichannel preferences and behaviour of over 65,000 physicians in over 25 therapeutic areas worldwide. These 50 million+ datapoints are utilized by our consultants to substantiate their strategic recommendations, as well as being accessible via a self-service, cloud-based platform through highly interactive tools and reports

Navigator365™ Planner

Turn strategic thinking into practical campaign planning. Fuelled by powerful insights from Navigator365™ Core, **Navigator365™ Planner** helps you build a robust omnichannel plan.

For in-depth benchmarking at the brand level...

Navigator365™ Cx Benchmark

Benchmark your brand for omnichannel leadership. **Navigator 365™ Cx Benchmark** offers a wealth of actionable benchmarking insights to help you take the right strategic channel and content optimization decisions versus your key competitors - at the brand level.

For insights into the payer landscape...

Navigator365™ Payer

Navigator 365™ Payer provides valuable insights to help you navigate the omnichannel payer landscape, in terms of channels, content, media and competition.

For an assessment of omnichannel maturity...

Maturometer™

An in-house **Maturometer™** assessment allows you to measure and benchmark your company's omnichannel maturity – internally and against our historic database – and prioritize key areas of digital transformation for future progress and competitive advantage.

For capability-building at scale...

Omnitopia™

The best way to learn is to do. **Omnitopia™** is an online multiplayer 'game' that effectively simulates the experience of planning and executing a real omnichannel campaign in a truly competitive setting.

COVERAGE 2022–2023

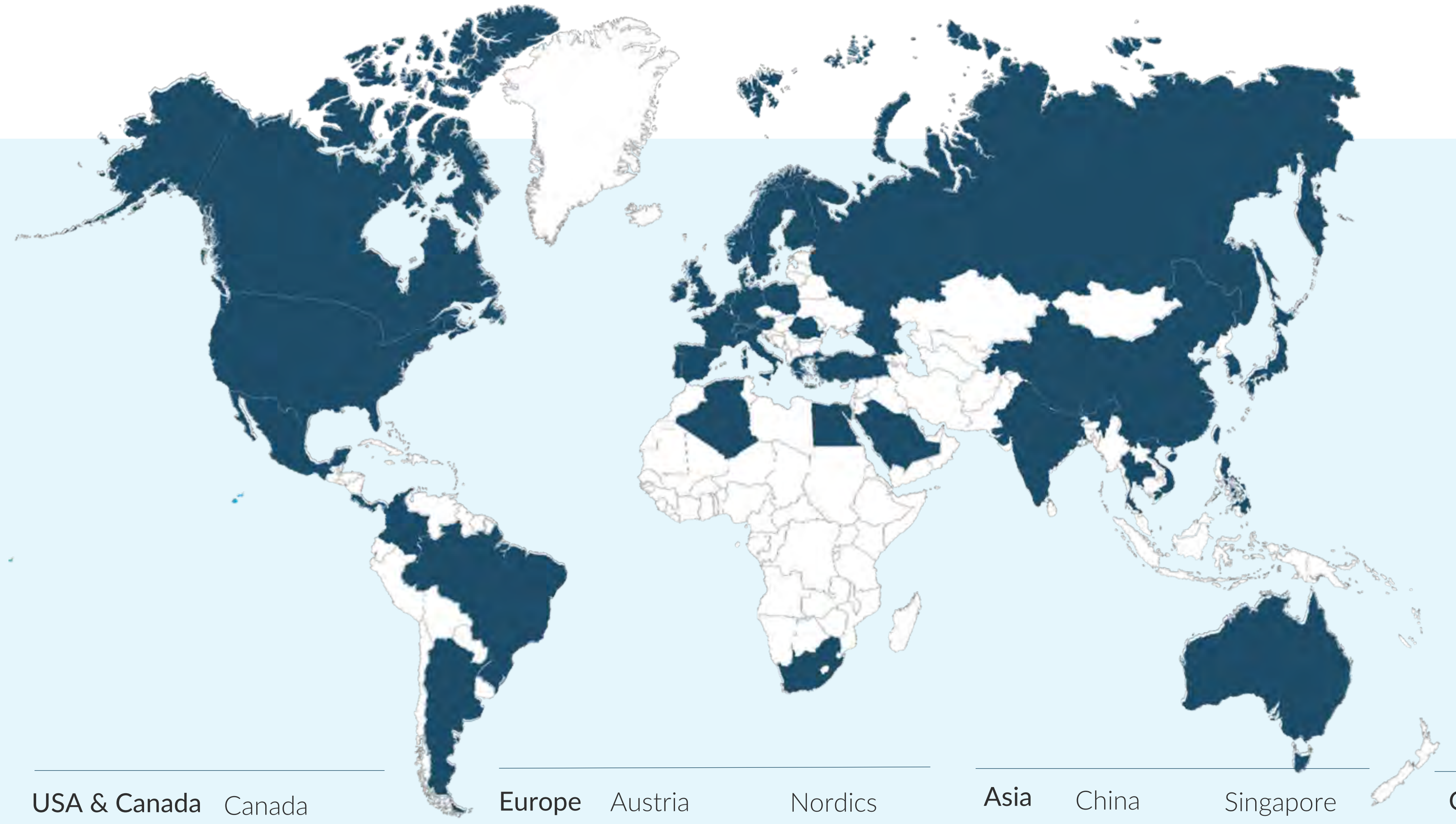
Navigator365™

Navigator365™ Core

THERAPEUTIC AREAS*

- CARDIOLOGY
- DERMATOLOGY
- ENDOCRINOLOGY
- GENERAL PRACTICE (GP)
- HEMATOLOGY
- NEUROLOGY
- ONCOLOGY
- PULMONOLOGY
- RHEUMATOLOGY

GEOGRAPHIC MARKETS



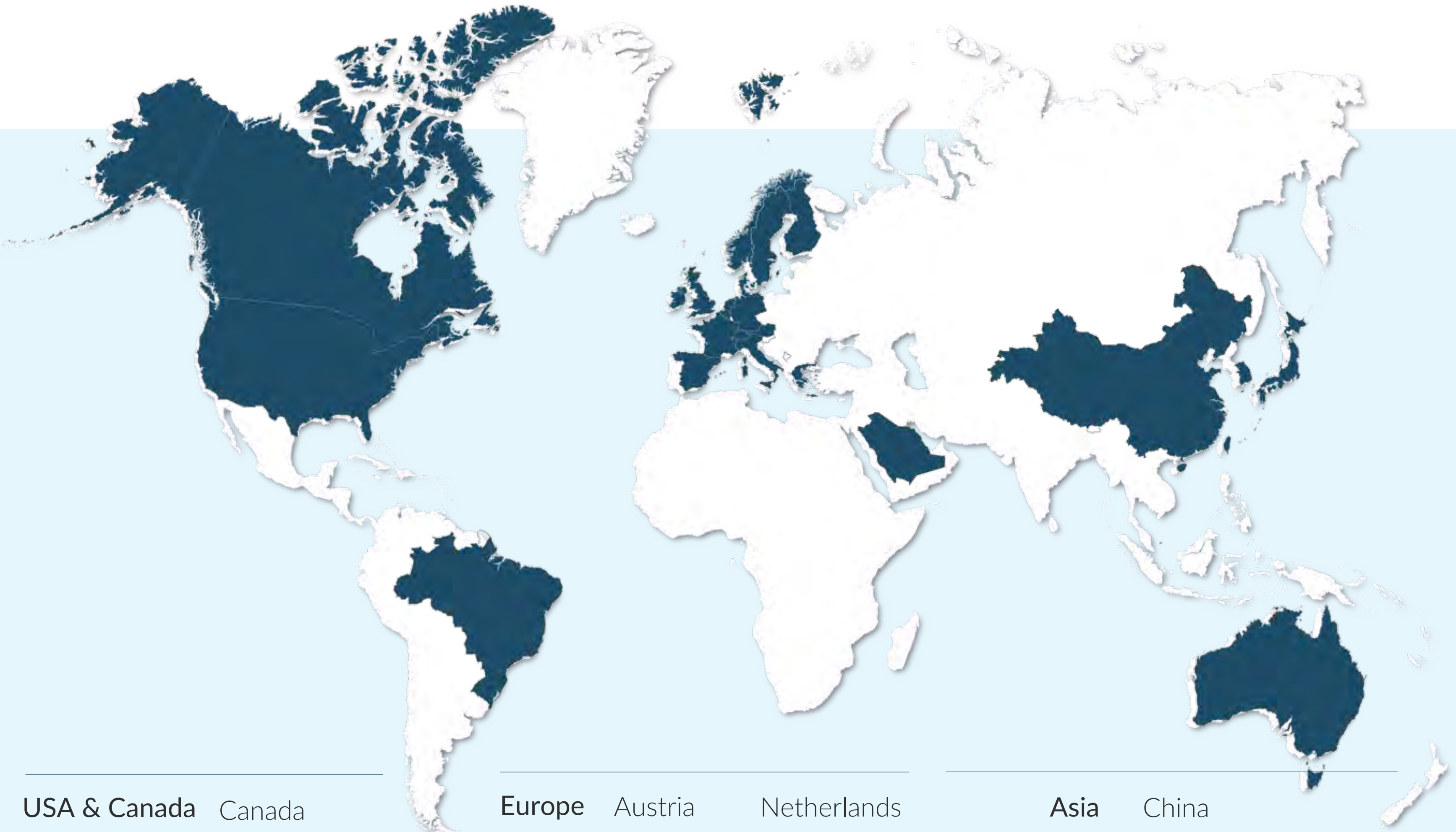
USA & Canada	Canada United States
LATAM	Argentina Brazil CENCA Colombia Mexico
Europe	Austria Belgium France Germany Greece Italy Netherlands Nordics Poland Portugal Romania Spain Sweden Switzerland UK
Asia	China India Japan Philippines Russia Singapore South Korea Taiwan Thailand Turkey Vietnam
Middle East & Africa	Algeria Egypt Saudi Arabia South Africa
Oceania	Australia

Navigator365™ Cx Benchmark

INDICATIONS

- ACUTE LEUKEMIA
- ADULT NUTRITION
- ASTHMA
- BIRTH CONTROL & MENOPAUSAL HORMONE THERAPY
- BREAST CANCER
- CF
- CHOLESTEROL
- CHRONIC LEUKEMIA
- CIPD
- COLORECTAL CANCER
- COPD
- DERMOCOSMETICS
- HEART FAILURE
- HIV
- IBD
- LUNG CANCER
- LUPUS
- MIGRAINE
- MS
- OVARIAN CANCER
- POLYCYTHEMIA VERA
- PROSTATE CANCER
- PsA
- PSORIASIS
- RENAL CANCER
- RHEUMATOID ARTHRITIS
- RSV
- SCHIZOPHRENIA
- SMA

GEOGRAPHIC MARKETS



USA & Canada	Canada United States
LATAM	Brazil
Europe	Austria Belgium Denmark Finland France Germany Greece Italy Netherlands Norway Spain Sweden Switzerland UK
Asia	China Japan South Korea Taiwan
Middle East & Africa	Saudi Arabia
Oceania	Australia

*Other TAs are possible; please contact your account manager or **customercare@a-cross.com** for more information

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We'd love to hear from you!

Let's connect

Talk to us about how we can help you plan and define your next omnichannel customer engagement strategy.

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a precision value & health team

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Across Health provides end-to-end consultancy and trusted advice to senior leaders of innovative multinational healthcare organizations.

At Across Health, we develop, execute and measure pragmatic, evidence-based omnichannel customer engagement strategies and companywide digital innovation and transformation programmes that unlock growth opportunities and strengthen your competitive advantage.

Across Health is a proud member of ***Precision Value & Health****, the commercialization services division of Precision Medicine Group.*