



ACROSS
HEALTH

a precision value & health team



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Reimagine customer engagement



 The webinar series

Omnichannel maturity: What's the industry up to? (Maturometer™ 2023)

Webinar #4 – THURSDAY 05/10

Ground rules

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

▼ Questions

Show Answered Questions

Question	Asker

Type answer here

- 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



Your hosts for today



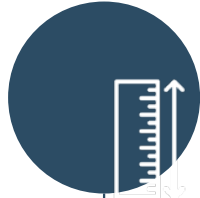
JAN KEUPPENS



SANDER GEYSEN



Respondent
overview



The industry's
maturity level



Drivers of industry
maturity level

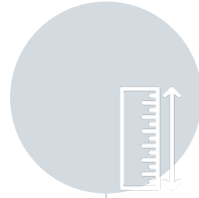


Your company's
situation

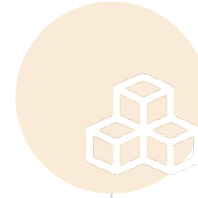




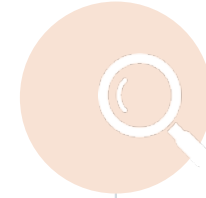
Respondent
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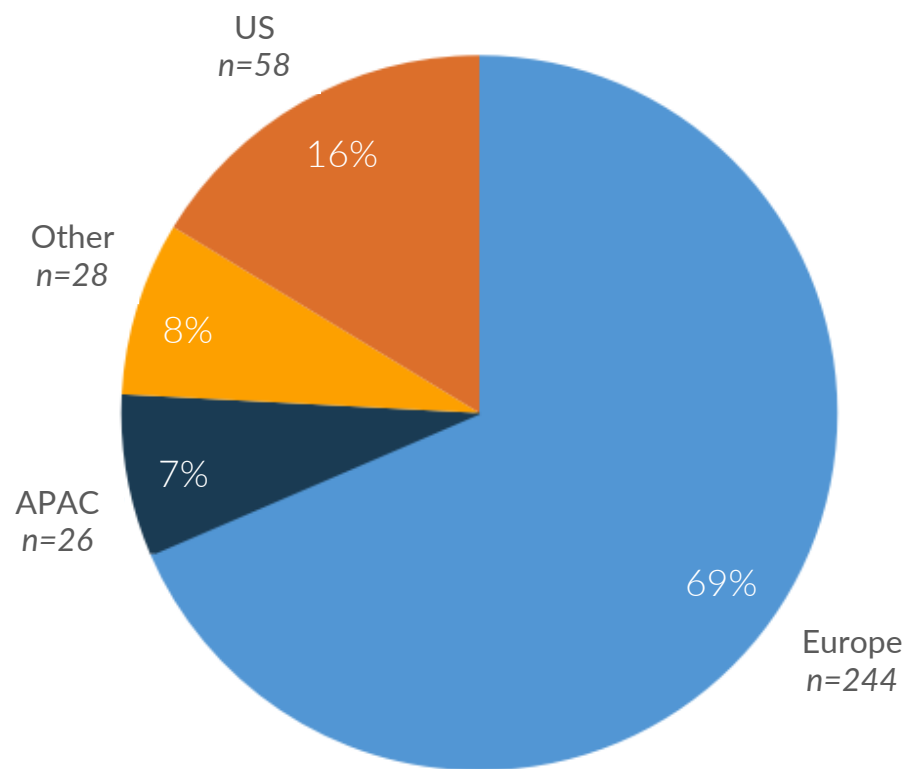


Your company's
situation

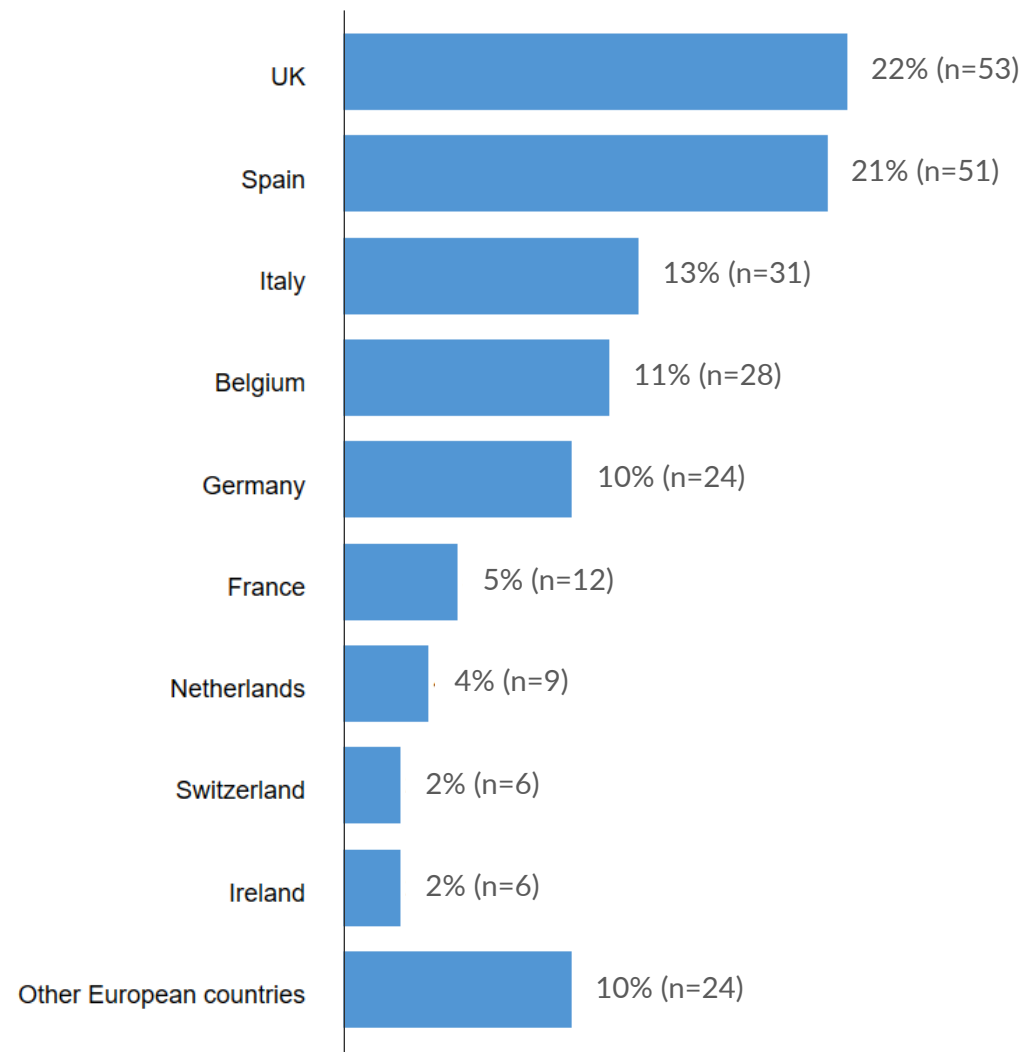


Profile of respondents

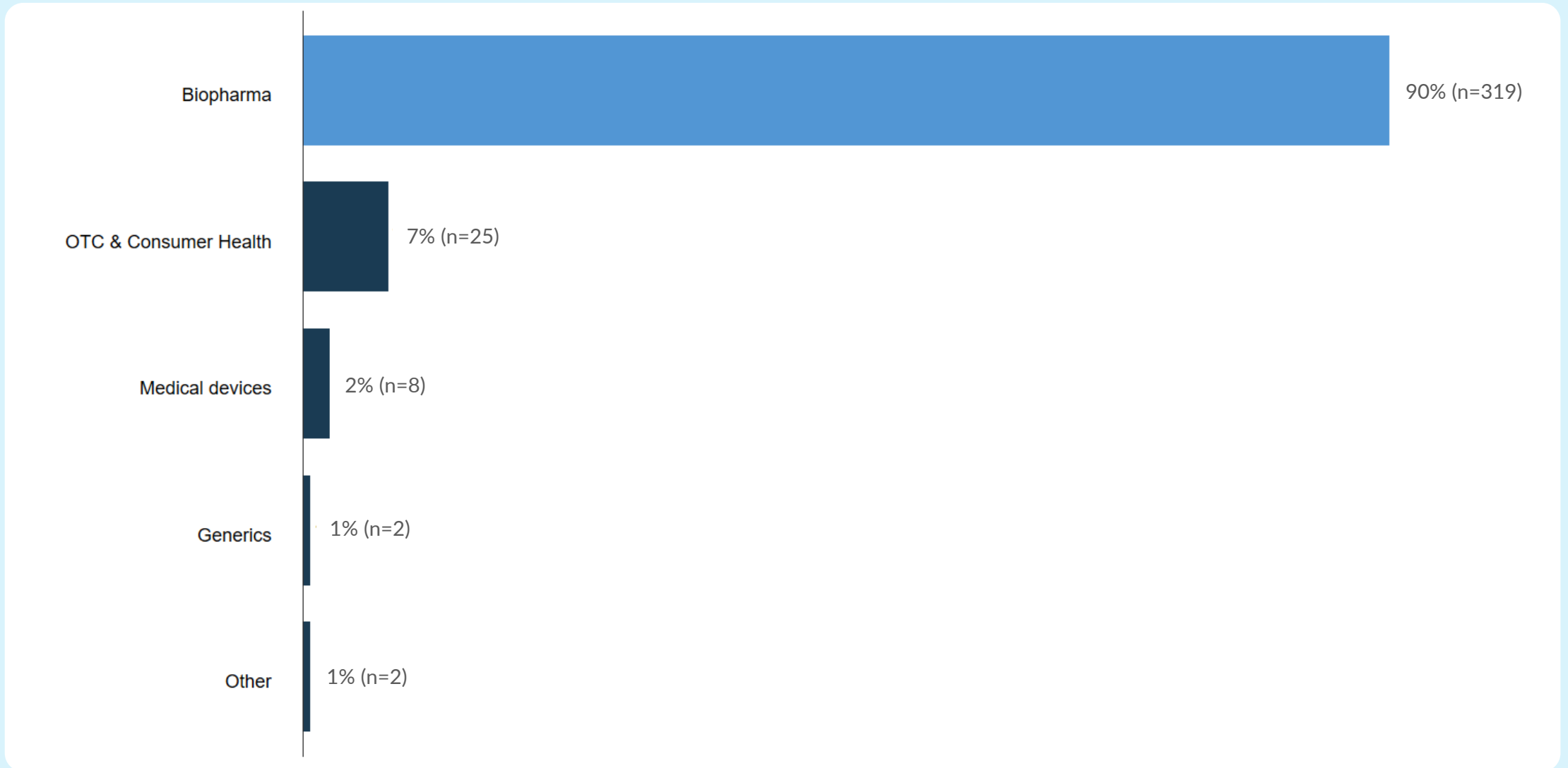
Regional split of respondents



European country representation



Profile of respondents

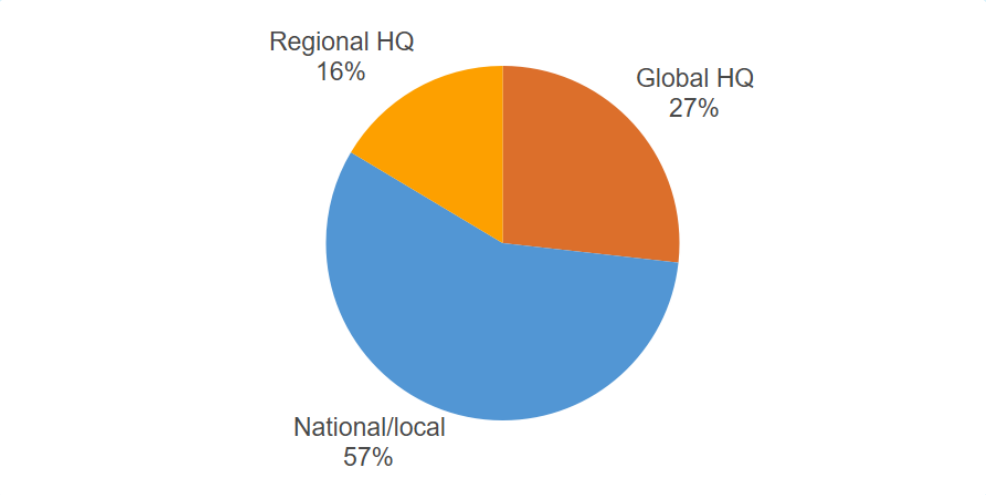




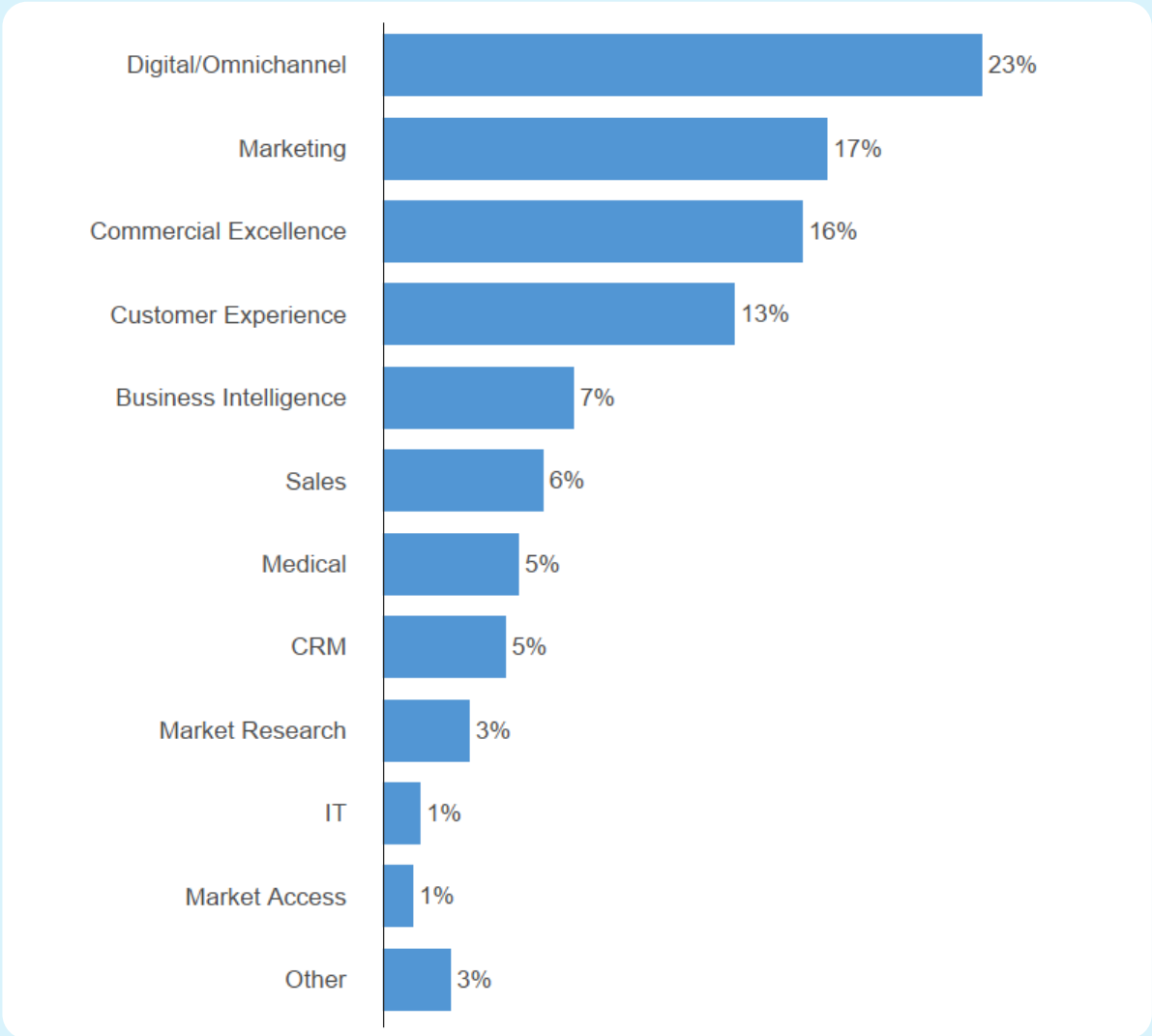
The following report
focuses on Europe Biopharma

Profile of respondents: Europe Biopharma (n=217)

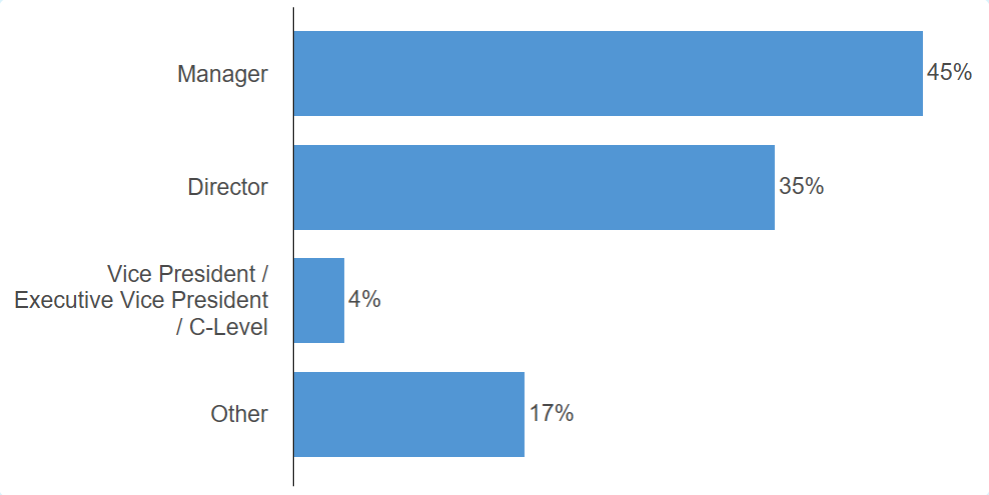
Main geographic scope

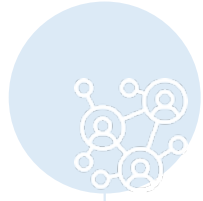


Function

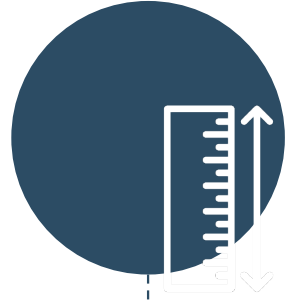


Position

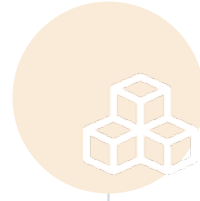




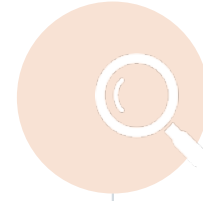
Respondent
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maturity level



Drivers of industry
maturity level

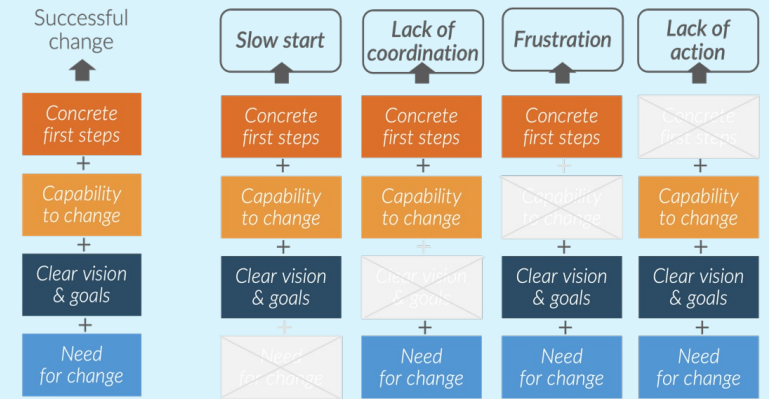
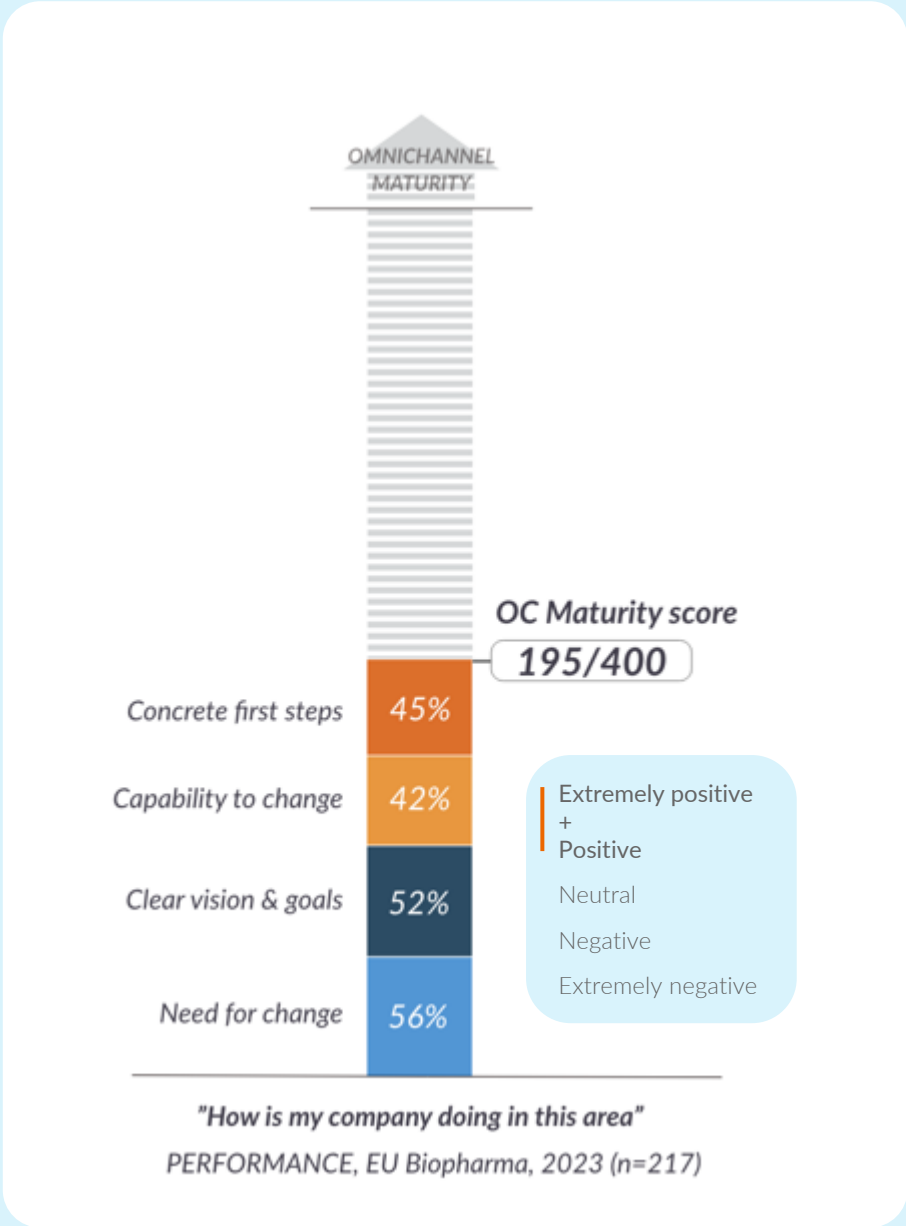
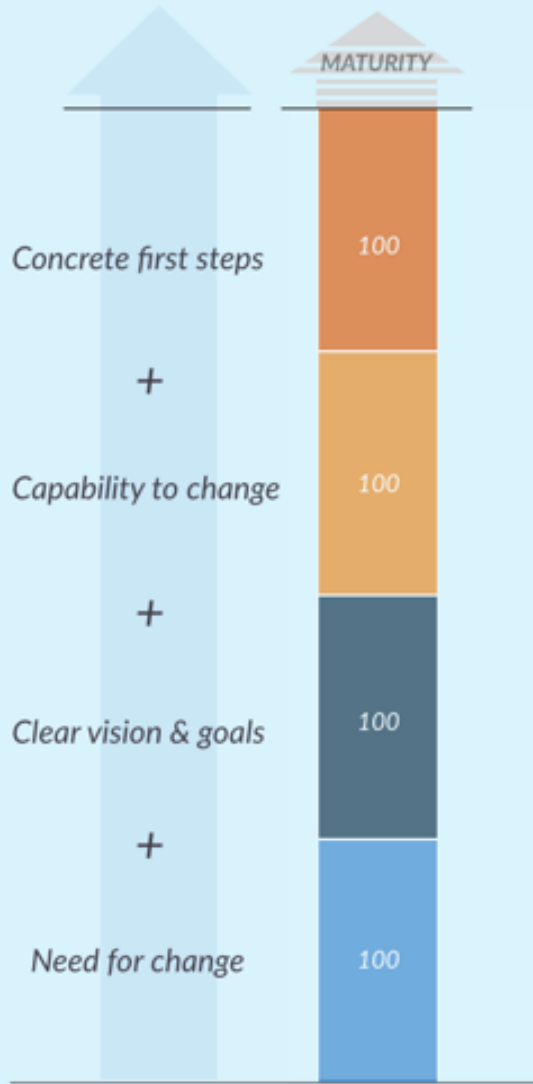


Your company's
situation



The OC Maturity Index

The OC Maturity Index



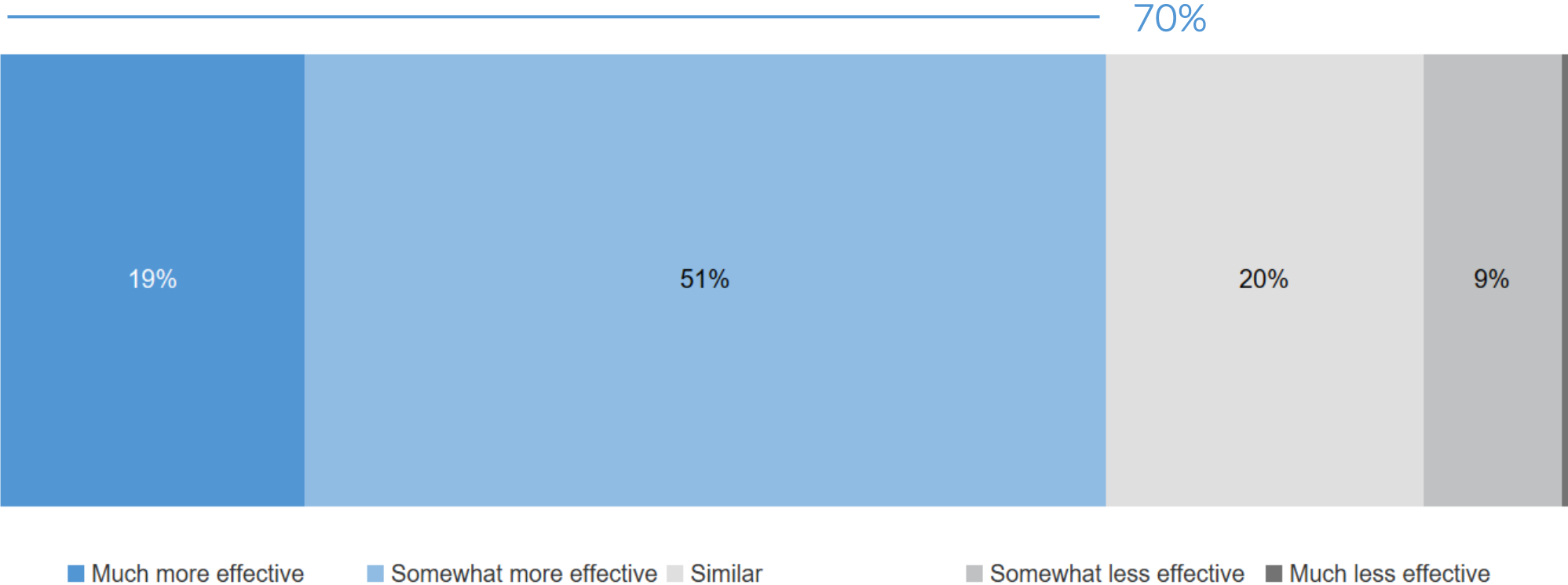
Inspired by Dannemiller's variation of the Gleicher formula (Source: Dannemiller and Jacobs, Changing the way organizations change. A revolution of common sense. Journal of Applied Behavioural Science (1992))



Has the market lost faith in the potential of omnichannel?

Pharma continues to view omnichannel as more effective than the traditional approach

How effectively do you think the current omnichannel engagement model is vs the “old normal” (ie, the approach before 2020/covid)?



Maturometer™ 2023, EU Biopharma, n=217

Poll

How did **budget spent on digital** evolve in '23 vs last year?

1. Digital budgets **went up**



2. Digital budgets **remained stable**

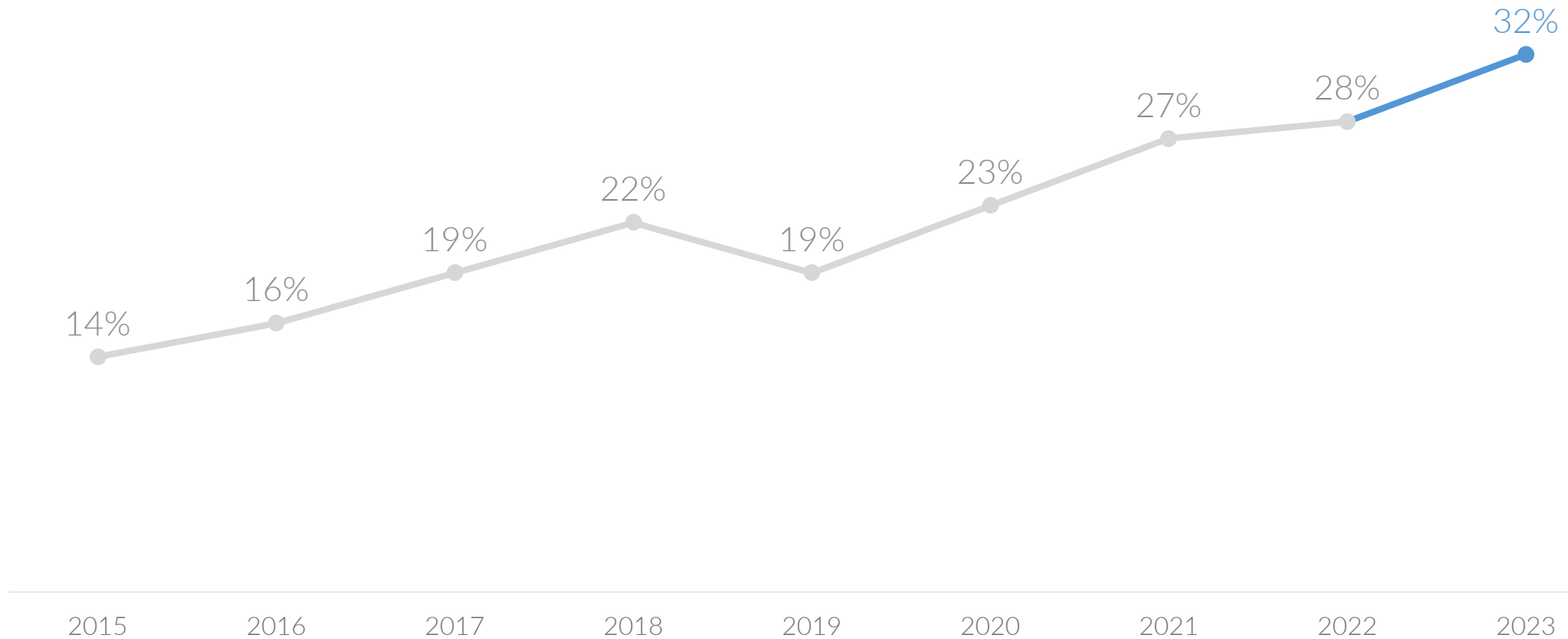


3. Digital budgets **went down**



Digital budgets continue to climb – hitting an all-time high of 32% – but still lag behind B2B

🗨️ Which percentage of your marketing budget is allocated to digital initiatives this year?



 Maturometer™ 2023, EU Biopharma, n=129



Money well spent?



Poll

How did **pharma and HCP satisfaction** evolve in '23?

1. Satisfaction from pharma & HCPs **went up**



2. Satisfaction from pharma & HCPs **remained stable**



3. Satisfaction from pharma & HCPs **went down**

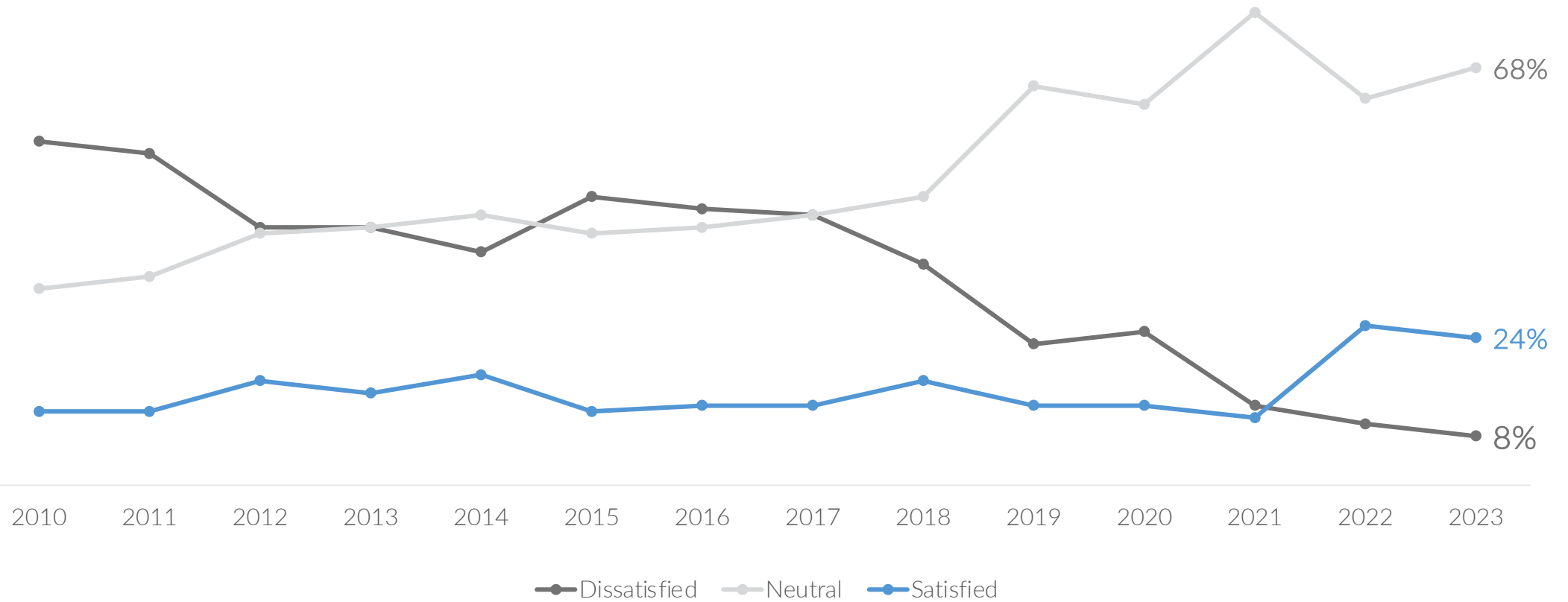


4. Satisfaction from pharma & HCPs **did not correlate**



Satisfaction levels among pharma staff do not follow increased budgets

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



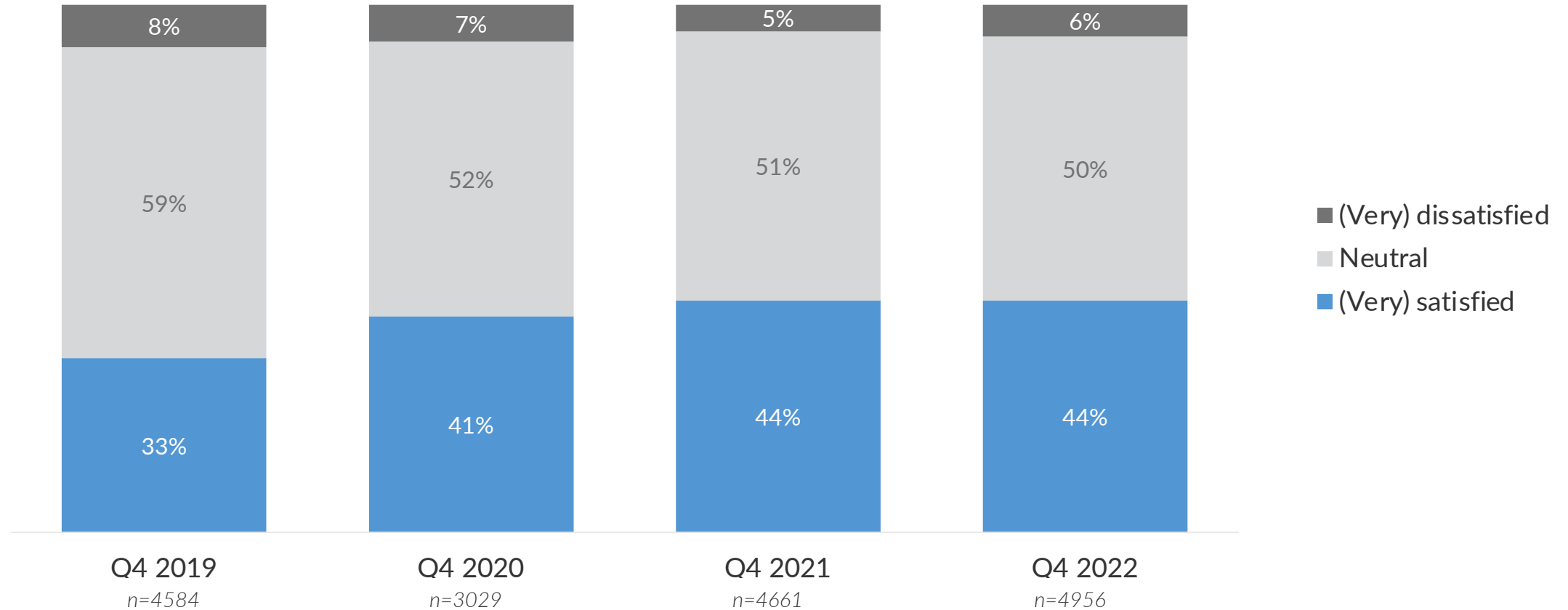
Maturometer™ 2023, EU Biopharma, n=217



What is the perception of HCPs?

Rising pharma budgets have not boosted HCP satisfaction either

? % of EU5 specialists satisfied with pharma's digital offerings



Navigator365™ Core 2019-2022, EU5

We have:

- Motivation
- Substantial budgets

We miss:

- Internal satisfaction
- External satisfaction

Why?



Why?

Hypothesis

1. Selective enabler investment



Maturometer™ 2023

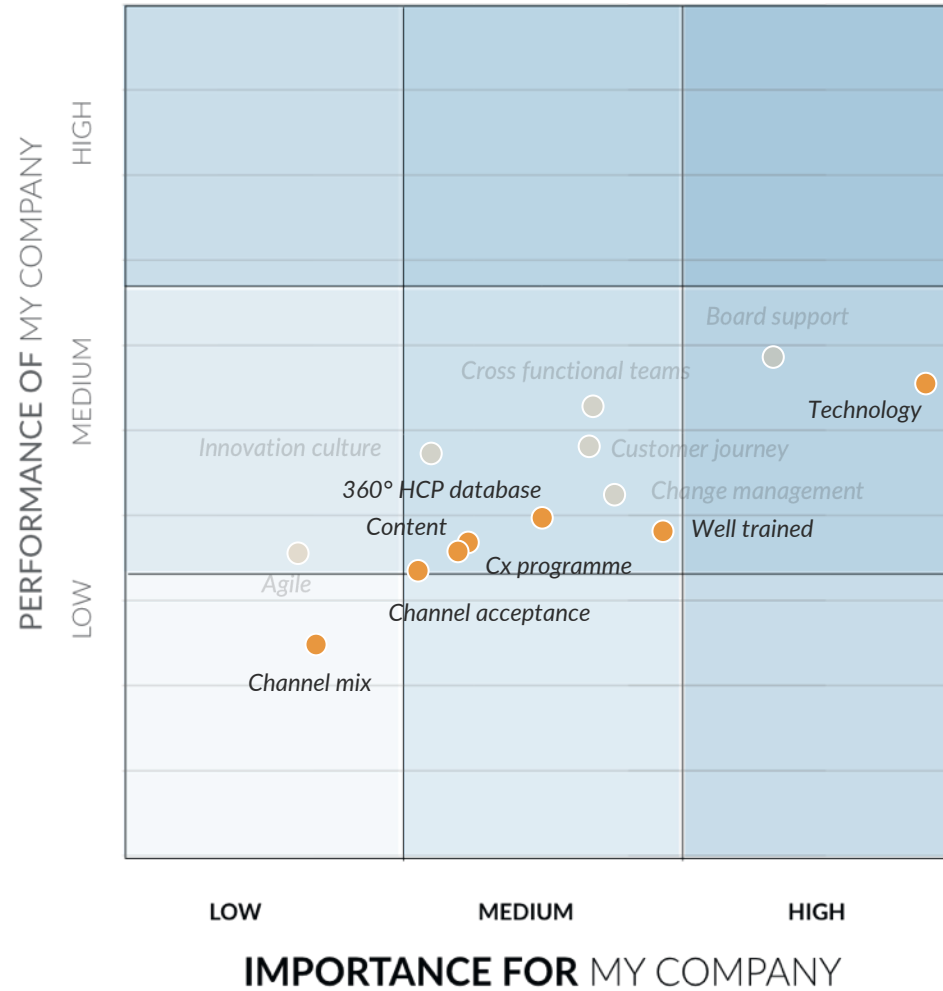
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HOW DO YOU ASSESS THE RELATIVE IMPORTANCE OF THESE 'CAPABILITY TO CHANGE' ENABLERS?



 Maturometer™ 2023, EU Biopharma, n=217

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Why?

Hypothesis

1. Selective enabler investment

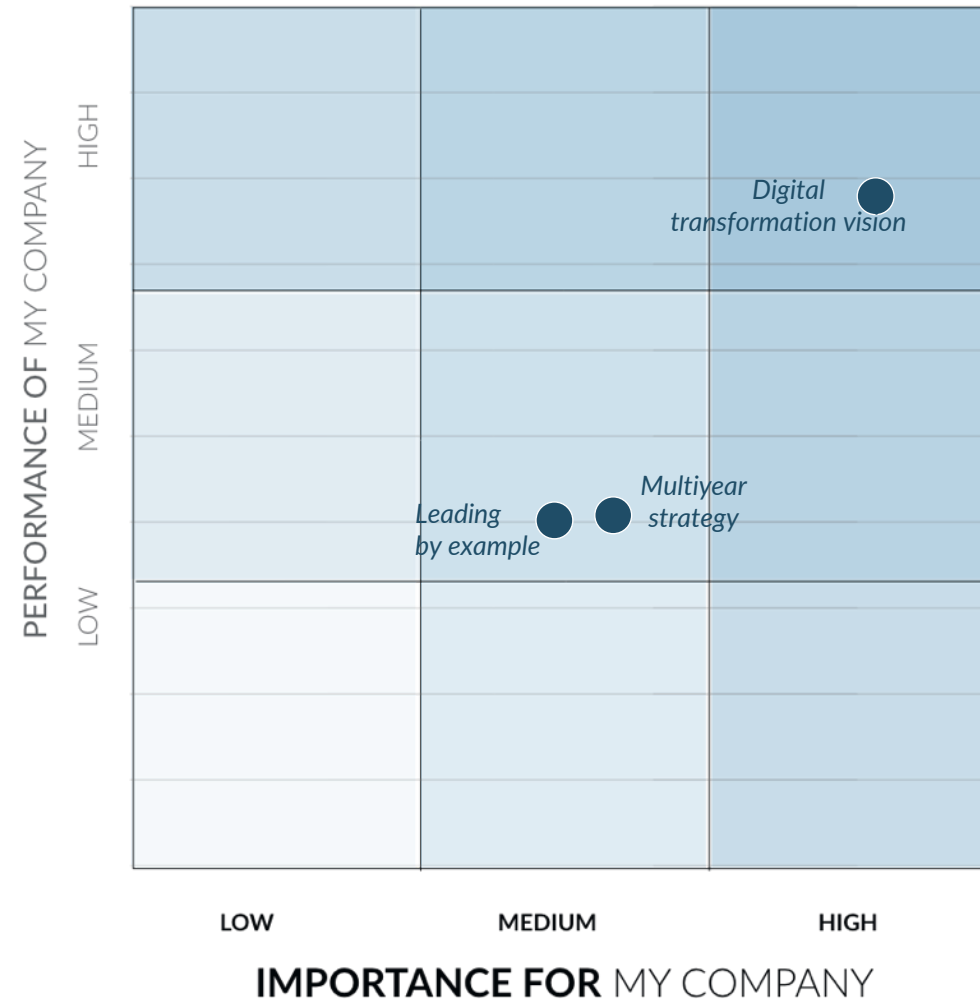


2. The vision to strategy paradox





HOW DO YOU ASSESS THE RELATIVE IMPORTANCE OF THESE 'CLEAR VISION & GOALS' DRIVERS?



 Maturometer™ 2023, EU Biopharma, n=217

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Why?



Hypothesis





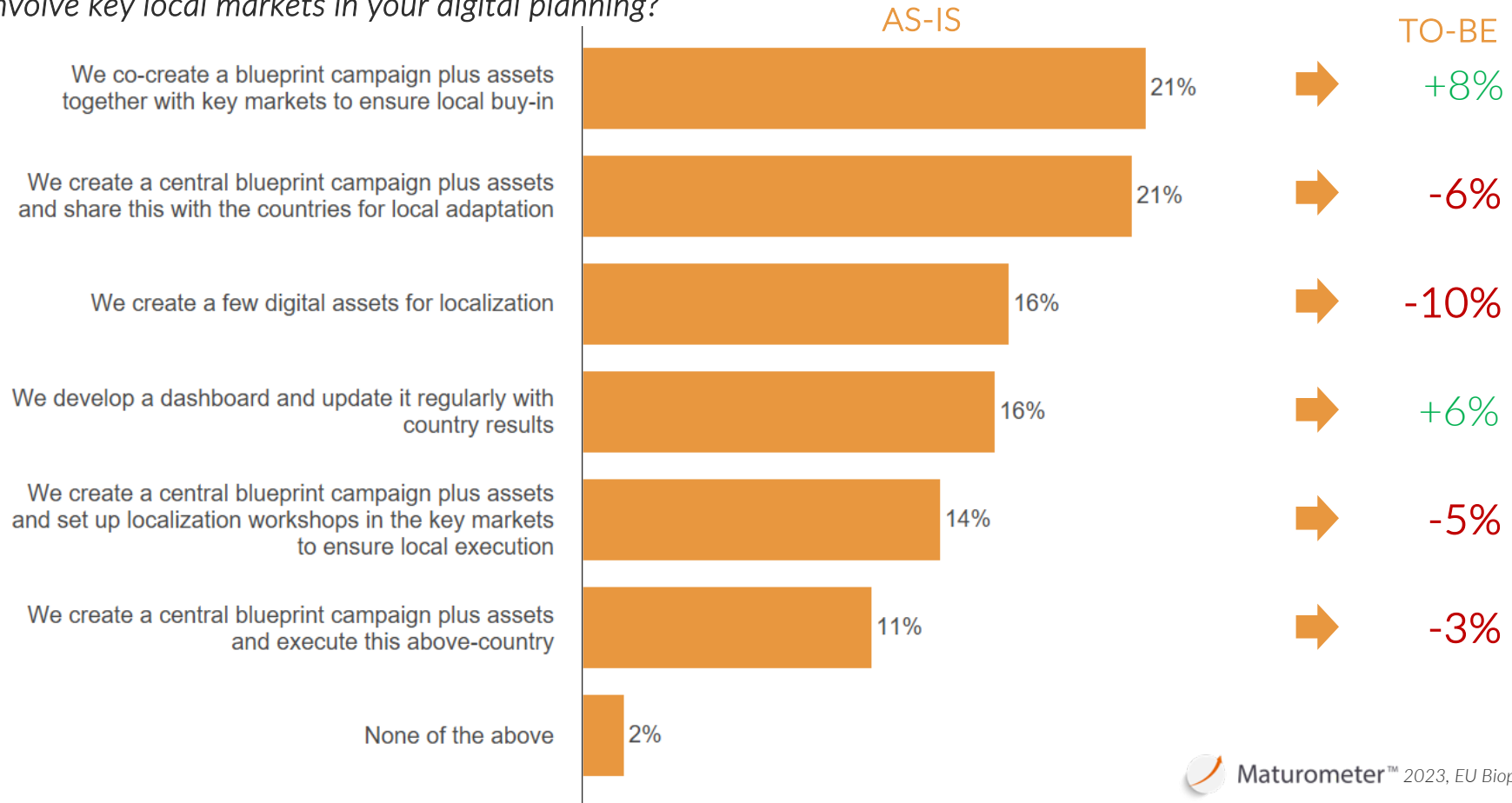
GLOBAL

LOCAL



More co-creation of campaigns and assets between HQ & local markets should improve business outcomes

🗨️ How do you involve key local markets in your digital planning?

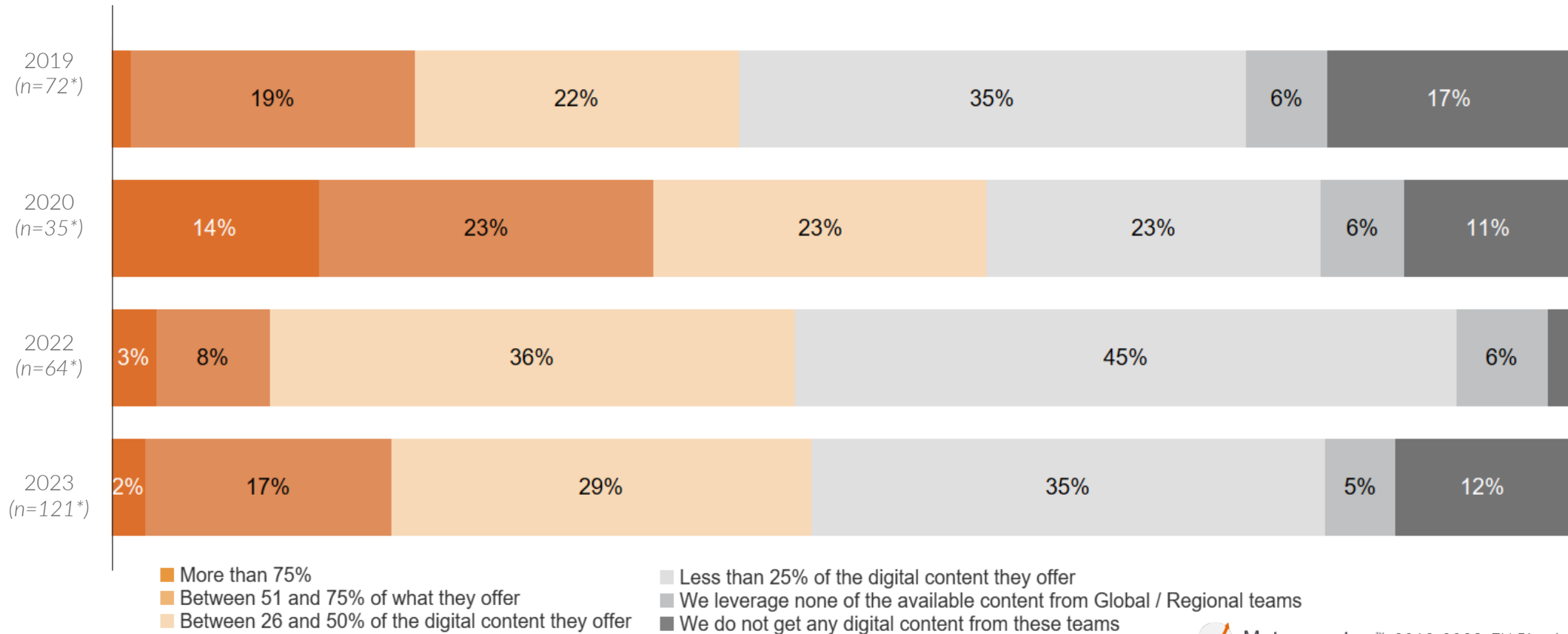


Maturometer™ 2023, EU Biopharma, n=92*

*Respondents working at the HQ level

Utilization of digital content from HQ by local markets is dropping to pre-C19 levels again

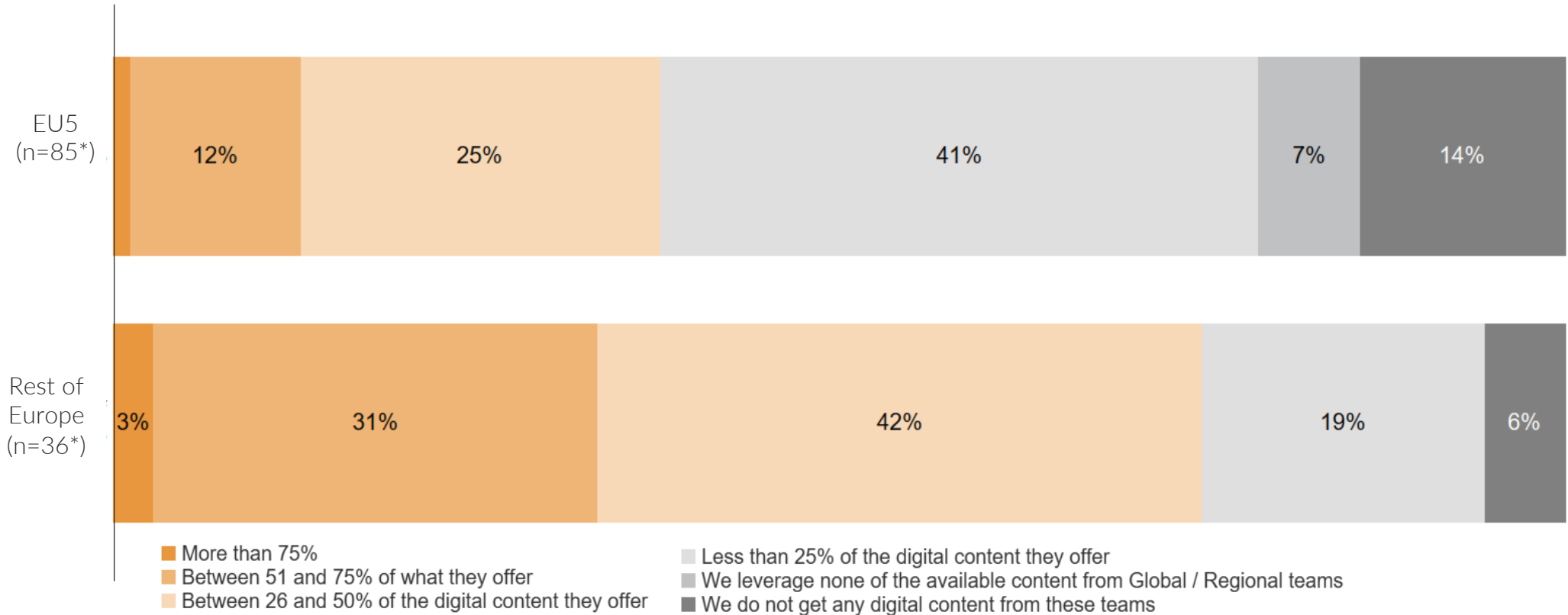
🗨️ To what extent do you leverage digital content from the Global/Regional teams?



Maturometer™ 2019-2023, EU Biopharma
 *Respondents working at the national/local level

Unsurprisingly, smaller European markets tend to rely more heavily on HQ-generated content

🗨️ To what extent do you leverage digital content from the Global/Regional teams?



 **Maturometer™ 2023, EU Biopharma**
*Respondents working at the national/local level

We have:

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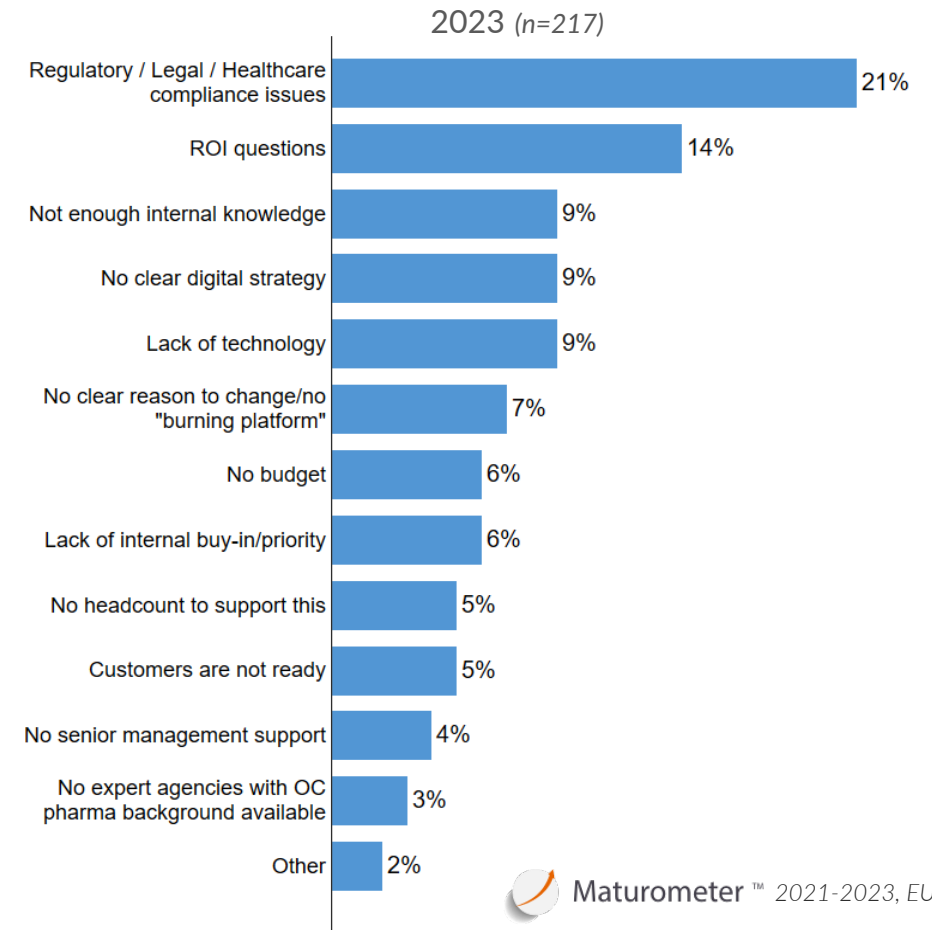
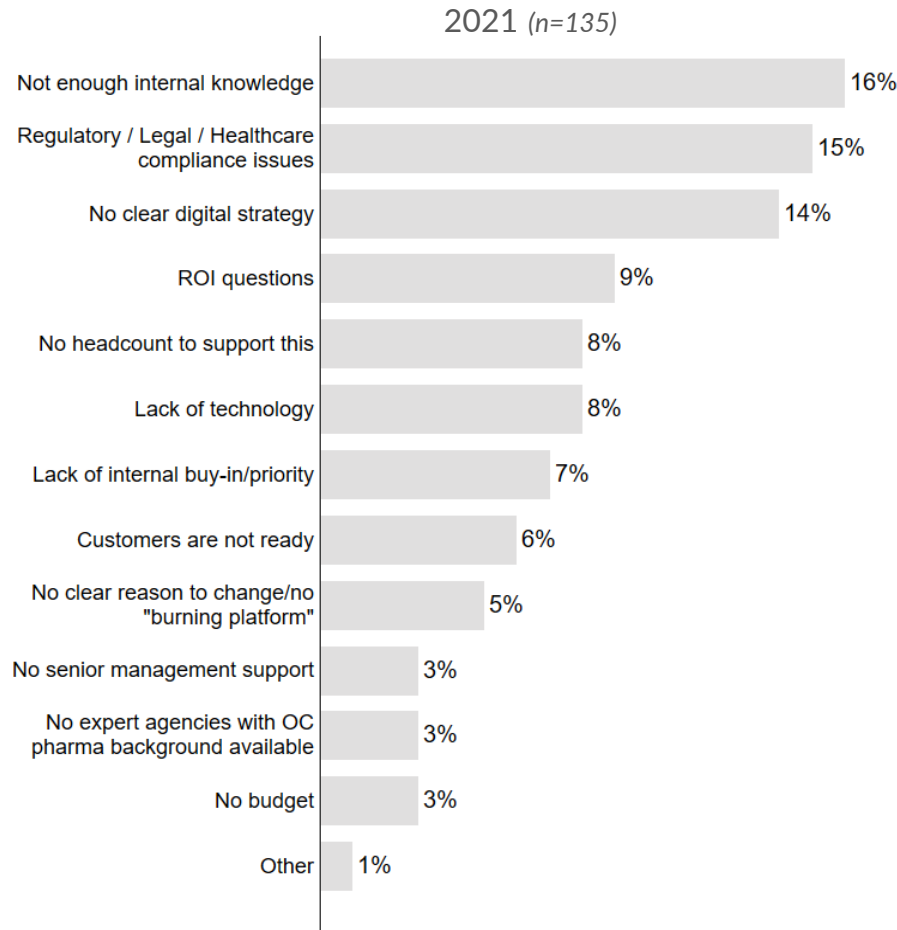
Why?





MLR issues continue to pose an important obstruction for digital success, with uncertainties around ROI running a close second

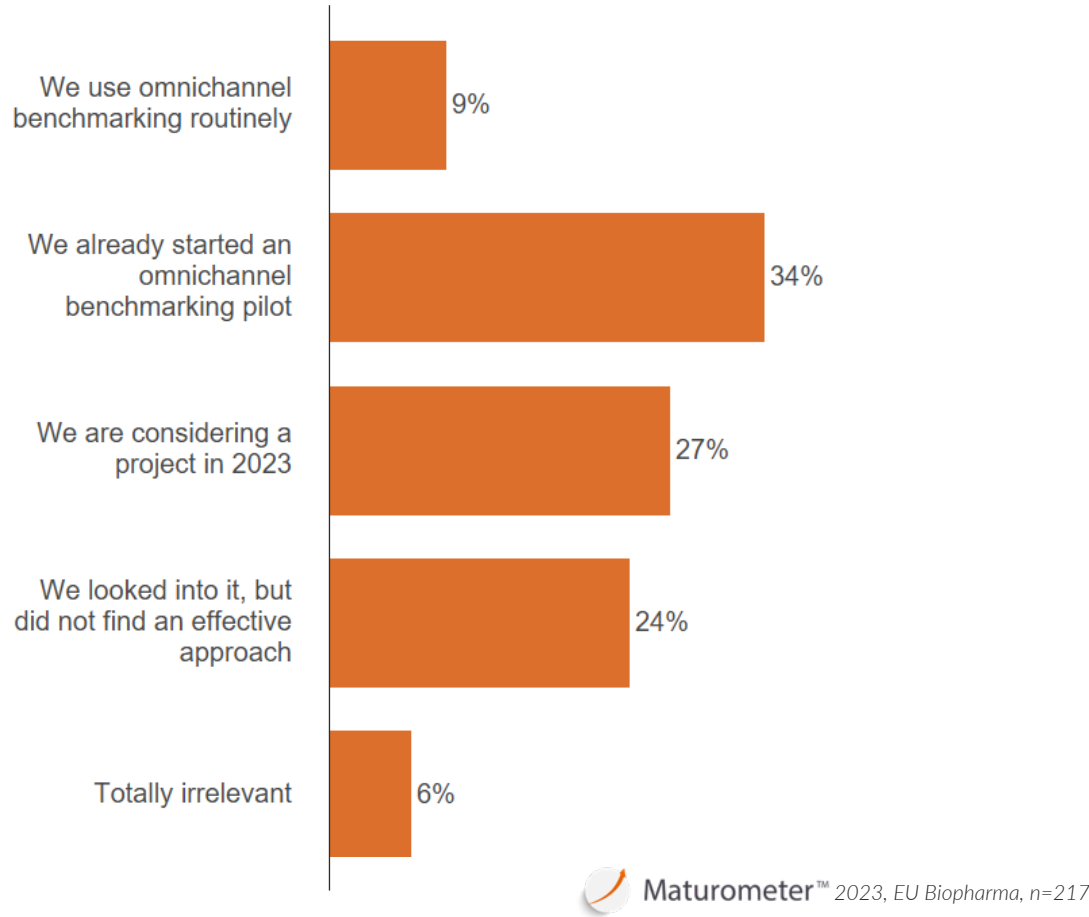
? What are potential bottlenecks for digital in your organization?



Maturometer™ 2021-2023, EU Biopharma

Very few respondents are benchmarking routinely, though most are either considering it or have a pilot underway

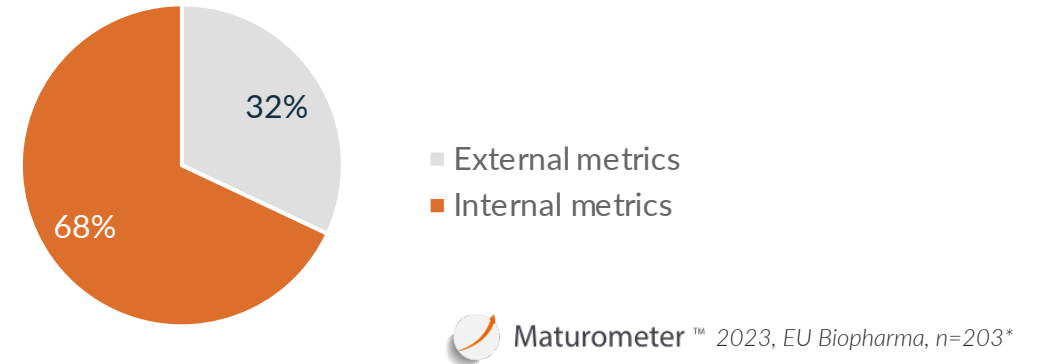
How important is benchmarking as a driver for omnichannel excellence for you?



How satisfied are you with your current omnichannel benchmarking activities?



Which omnichannel benchmarking parameters are you tracking/considering?



*Respondents that don't consider benchmarking irrelevant
 **Respondents have experience with omnichannel benchmarking

We have:

- Motivation
- Substantial budgets

We miss:

- Internal satisfaction
- External satisfaction



Hypothesis

5. Uneven digital skill levels

4. The ROI bottleneck

1. Selective enabler investment

2. The vision to strategy paradox

3. Global-to-local efficiency gap



Maturometer™ 2023

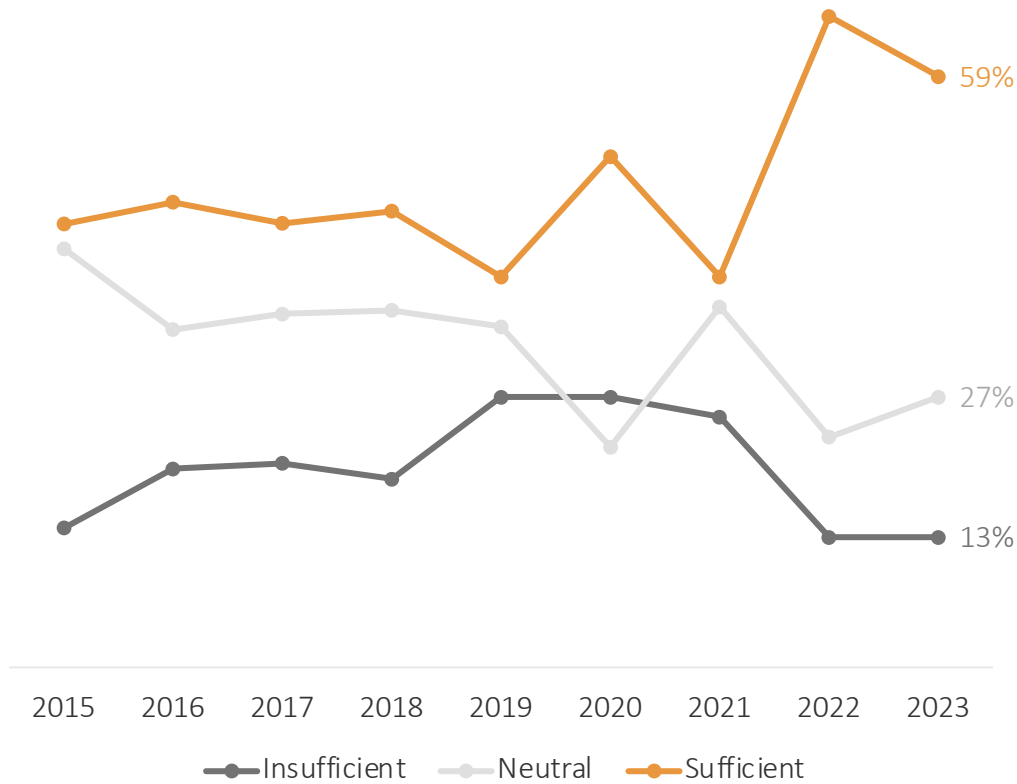
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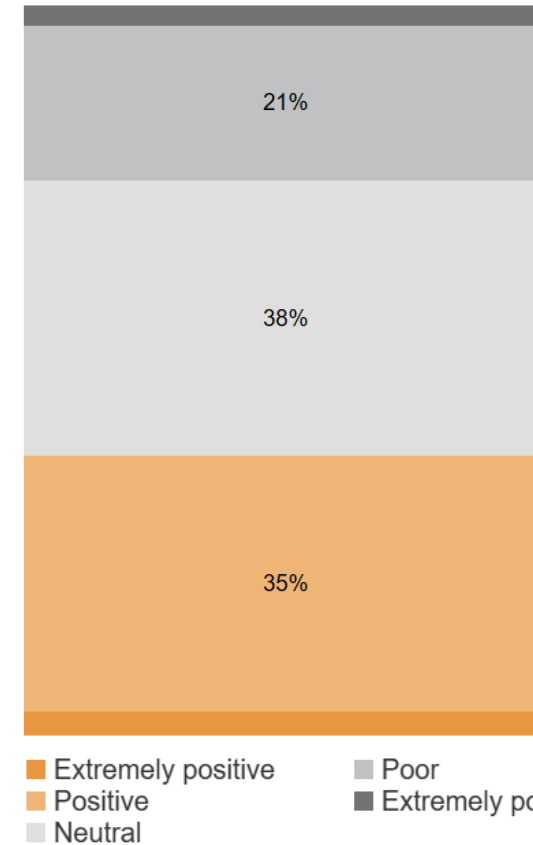
A disconnect between self-reported knowledge of digital and company-level capabilities indicates an uneven knowledge distribution

Do you feel that you have sufficient knowledge of all opportunities offered by digital for your business activities?



Maturometer™ 2019- 2023, EU Biopharma

The company's staff is well trained in digital



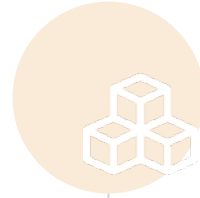
Maturometer™ 2023, EU Biopharma, n=217



Respondent
overview



The industry's
maturity level



Drivers of industry
maturity level



Your company's
situation





Poll

What is the your **main blocker for being more/fully mature** when it comes to digital?



Questions?



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Reimagine customer engagement



The webinar series

2023

UPCOMING:

- Omnichannel Launch Excellence: From global to local

THURSDAY, NOV. 9TH 16H CET



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