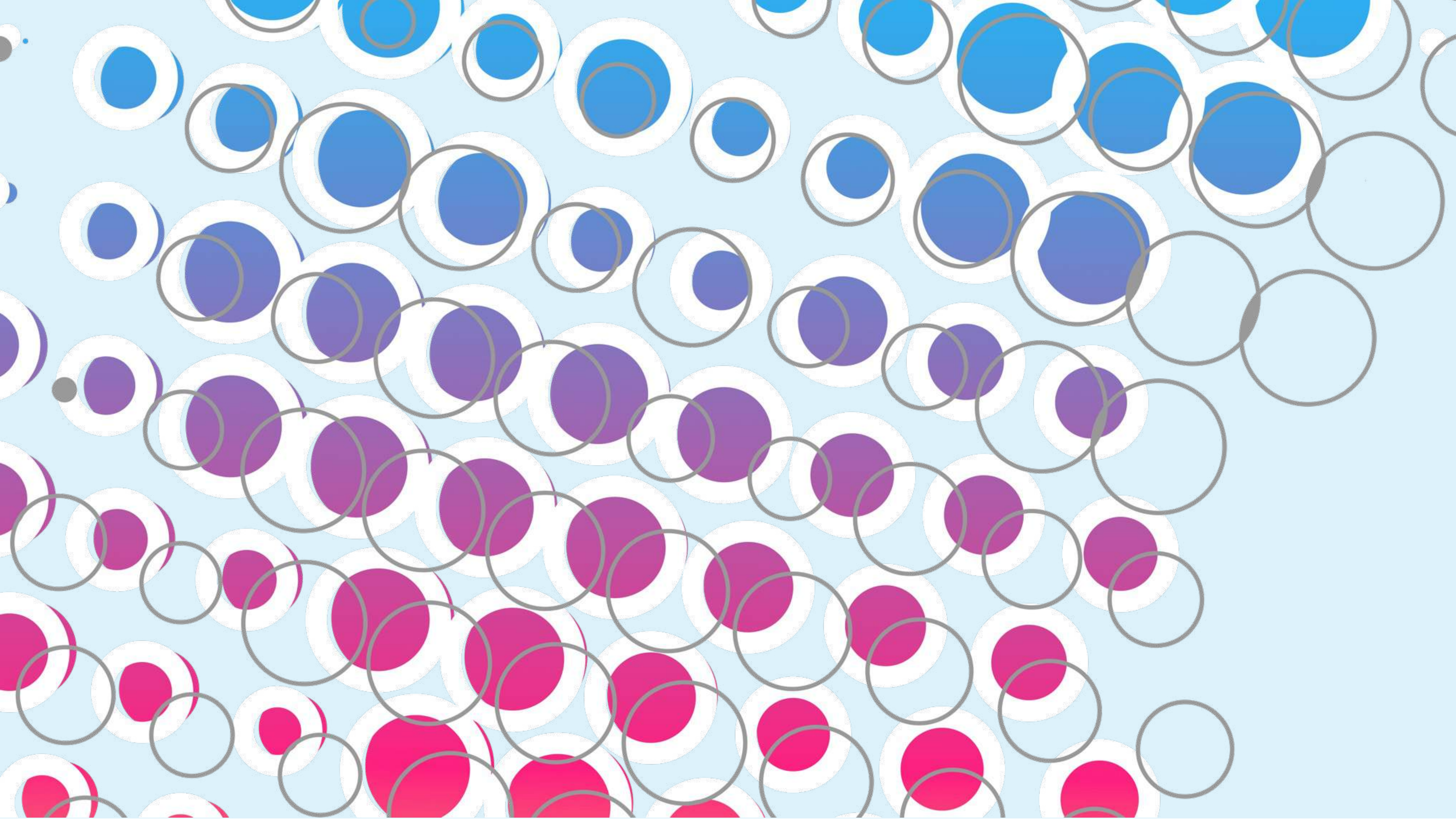

ACROSS HEALTH

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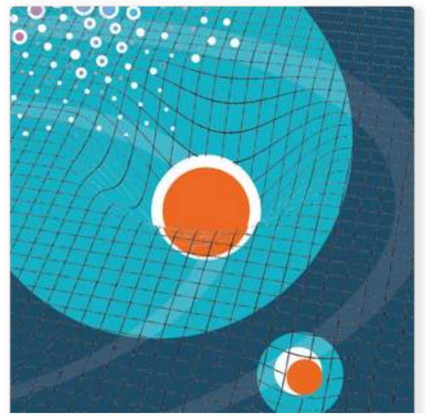
THE STATE OF OMNICHANNEL IN BIOPHARMA 2022 GLOBAL TRENDS REPORT

Insights and **highlights** from our **2022 Navigator365™** and **Maturometer™ research**

HCP
engagement



INDUSTRY
performance

CHANNEL
metrics

LAUNCH
trends

BENCHMARK
analysis

PAYER
highlights

Welcome to our first annual Global Trends Report on the state of omnichannel customer engagement in biopharma.

In this report, we aim to share some of 2022'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 specialist and payer 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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INTRODUCTION

Necessity is the mother of invention, and faced with Covid-19 lockdowns, biopharma strongly accelerated its digital investments – with many HCPs truly appreciating this unprecedented boost of "anytime, anywhere" digital offerings.

Since the restrictions were lifted, however, the in-person channels have seen a rapid rebound. And while this may appear a bit unexpected, it's easy to see why the industry would pursue a 'business as usual' approach. Next to the fact that many physicians were keen to re-engage in-person after such a long period ("skin hunger"), it's also quite complex and time-consuming to achieve omnichannel excellence at scale – indeed, the boost of digital channels in 2020–2021 might be better characterized as "multichannel" (firing more channels at the customer) rather than true omnichannel (with the customer at the centre). Reps and MSLs tend to know their customers and can adapt to them in a truly flexible way; no need for personalized modular content – customer-facing teams can adapt their topics seamlessly and instantly – or even a 360° view of the customer in the CRM, since actionable customer information sits "in the head" of the rep/MSL. It's probably not a coincidence then, that HCP satisfaction with biopharma's digital offerings plateaued in 2022 after the past few years of steady gains.

The 'digital divide' provides a clear indicator of a lack of equilibrium and shows that HCPs' demand for omnichannel engagement continues to outstrip the supply from biopharma. It's clear that HCPs still appreciate a richer, more personalized and high-Cx omnichannel mix ("right time, right content, right channel"), and innovative customer-centric companies have jumped on the unique opportunity to gain a competitive edge. Averages often hide a huge variation, and assuming that the industry as a whole is moving back to the old normal – permanently – would be a big mistake.

As we move further into this decade, innovators will continue to grow their competitive edge – an efficient and effective channel and content mix in tune with customer needs – resulting in a superior Cx as well as higher sales and margins. Rigorous benchmarking and other customer insights will further fuel their go-to-market leadership.

Omnichannel: despite the benefits being simple to understand, nobody ever said it would be easy to implement at scale. But now, more than ever, it's the flywheel for healthy long-term growth in an increasingly multistakeholder- and customer-led environment.

ABOUT US

Across Health is an end-to-end boutique consultancy and trusted advisor 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.*

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DATA SOURCES

Navigator365™ Core

Since research began in 2013, the Across Health 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 accessible via a self-service, cloud-based platform through highly interactive tools and reports.

Maturometer™

Each year, the Across Health **Maturometer™** surveys life science industry colleagues 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.

Navigator365™ Cx Benchmark

Navigator365™ Cx Benchmark allows you to compare your brand to key competitors – and take key decisions at the Cx, content, channel and functional level (marketing, sales, medical, patient).

Navigator365™ Payer

Based on the proven strengths of Navigator365™ Core, **Navigator365™ Payer** offers highly actionable insights into the dynamic omnichannel payer landscape: channels, content/context, media and competition.

DATASETS BY REGION

US
United States

EU5
France
Germany
Italy
Spain
United Kingdom

APAC
Australia
China
Japan
Singapore
South Korea

LATAM
Argentina
Brazil
Mexico

EU
Europe in Maturometer™ 2022 data: EU5 + Austria, Belgium, Bulgaria, Denmark, Greece, Netherlands, Romania, Switzerland, Sweden

1. HCP engagement

POWERED BY Navigator365™ Core

HCP engagement

HCP ENGAGEMENT KPIs

Looking at specialists in particular, we see that, when it comes to commercial engagement with biopharma, over half prefer an omnichannel approach – and the demand increases when we look at medical (educational) engagement.

Probing the much-touted concept of the 'omnichannel rep' (engagement with a rep via remote detailing, email and F2F) reveals that fewer than 10% of specialists are being served by all three channels – 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 lower still for the critical launch phase, which arguably benefits from a balanced omnichannel go-to-market approach even more.

The journey towards a superior omnichannel customer experience with biopharma clearly has a way to go yet. But some companies are ahead of the curve and reaping the benefits already (*see Benchmark section*).

↓ Decrease (>10% decrease vs 2021)   ↑ Increase (>10% increase vs 2021)

HCP PERSPECTIVE (specialists)	US 2021	US 2022	EU5 2021	EU5 2022	APAC 2021	APAC 2022	LATAM 2021	LATAM 2022	GLOBAL* 2021	GLOBAL* 2022
	n=2071	n=2208	n=5041	n=4718	n=734	n=796	n=1075	n=482	n=8921	n=8204
HCPs who PREFER OMNICHANNEL engagement with pharma (COMMERCIAL) (% who prefer digital-only + % who prefer mix of digital and F2F)	49%	49%	54%	55%	70%	63% ↓	61%	59%	59%	57%
HCPs who PREFER OMNICHANNEL engagement with pharma (MEDICAL) (% who prefer digital-only + % who prefer mix of digital and F2F)	63%	64%	68%	69%	78%	73%	73%	73%	71%	70%
HCPs reached by the OMNICHANNEL REP (engaged by rep, remote rep and rep email in the past 3 months)	10%	8% ↓	10%	9% ↓	6%	7% ↑	13%	6% ↓	10%	8% ↓
HCPs reached by the OMNICHANNEL MSL (engaged by MSL, remote MSL and MSL email in the past 3 months)	8%	7% ↓	8%	9% ↑	5%	4% ↓	6%	6%	7%	7%
HCPs who view pharma digital as (VERY) IMPORTANT	53%	53%	61%	62%	60%	57%	75%	80%	62%	63%
HCPs (VERY) SATISFIED with biopharma's digital offerings	41%	44%	43%	45%	46%	44%	55%	51%	46%	46%
HCPs (VERY) SATISFIED with biopharma's digital offerings AT LAUNCH†	N/A	38%	N/A	34%	N/A	35%	N/A	41%	N/A	37%

N/A: data not available
**Global: US, EU5, APAC and LATAM averaged (mean)*
†Not all specialists were asked the launch question: US (n=2108), EU5 (n=4617), APAC (n=564), LATAM (n=306) and Global (n=7595)

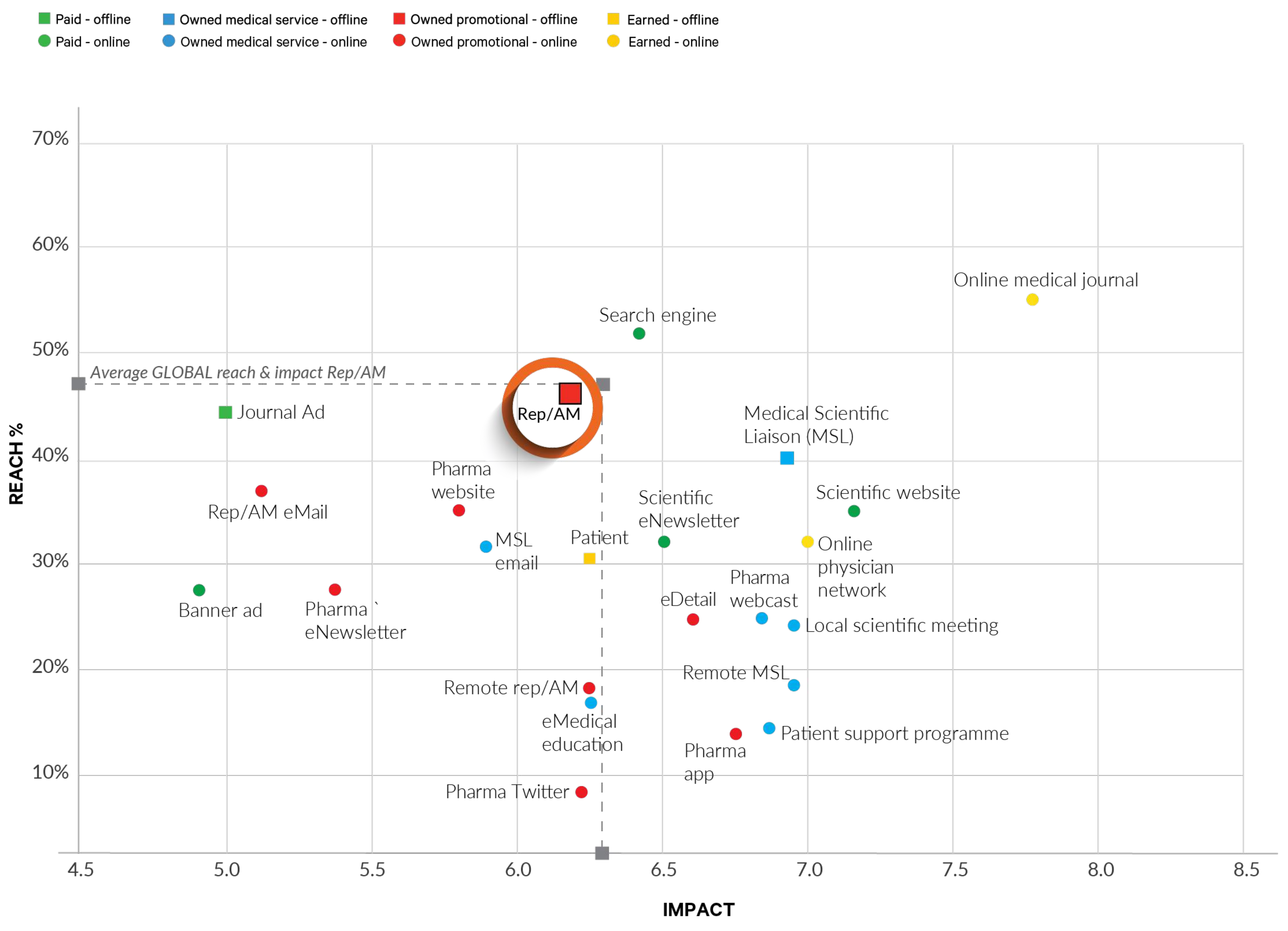
Source: Navigator365™ Core, all specialists, consolidated data

CHANNEL PERFORMANCE (1/2)

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.

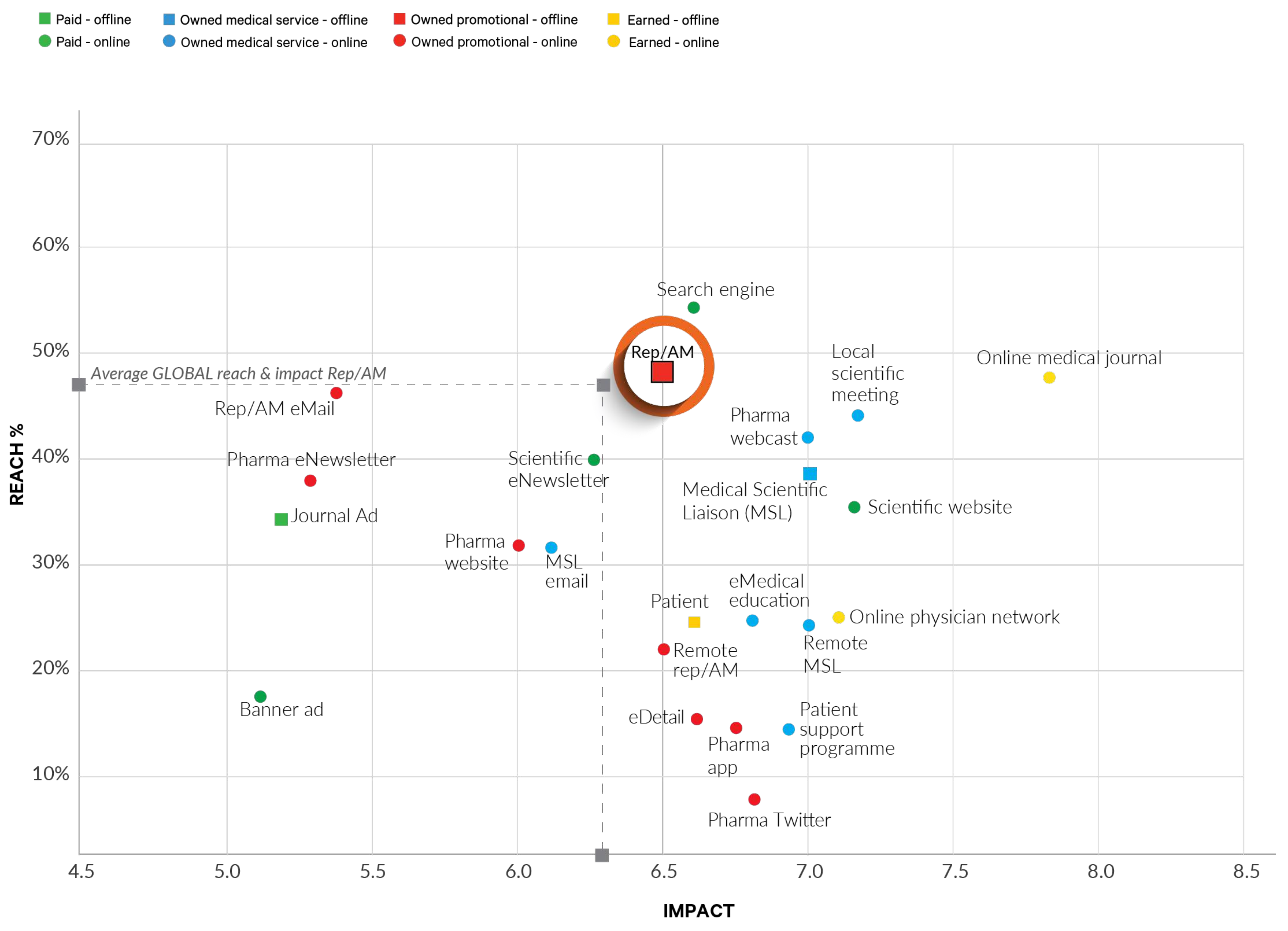
While the full omnichannel catalogue covers over 50 channels, the following four charts plot a subset of key channels in order to give a topline view on the channel landscape among specialists in each of our four focus markets in 2022.

PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, US, 2022



Source: Navigator365™ Core, US, all specialists, 2022 (n=2208)

PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, EU5 2022



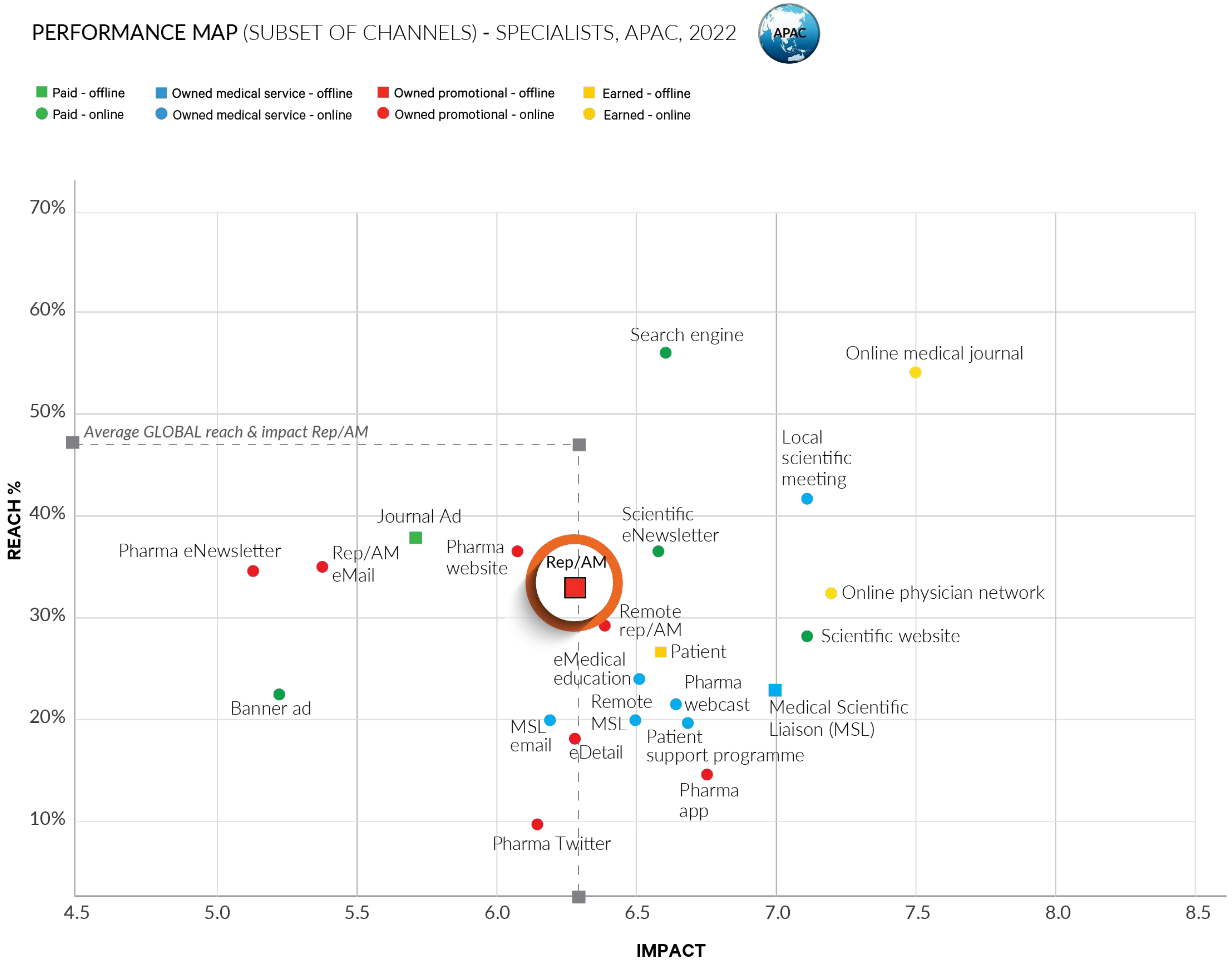
Source: Navigator365™ Core, EU5, all specialists, 2022 (n=4718)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

CHANNEL PERFORMANCE (2/2)

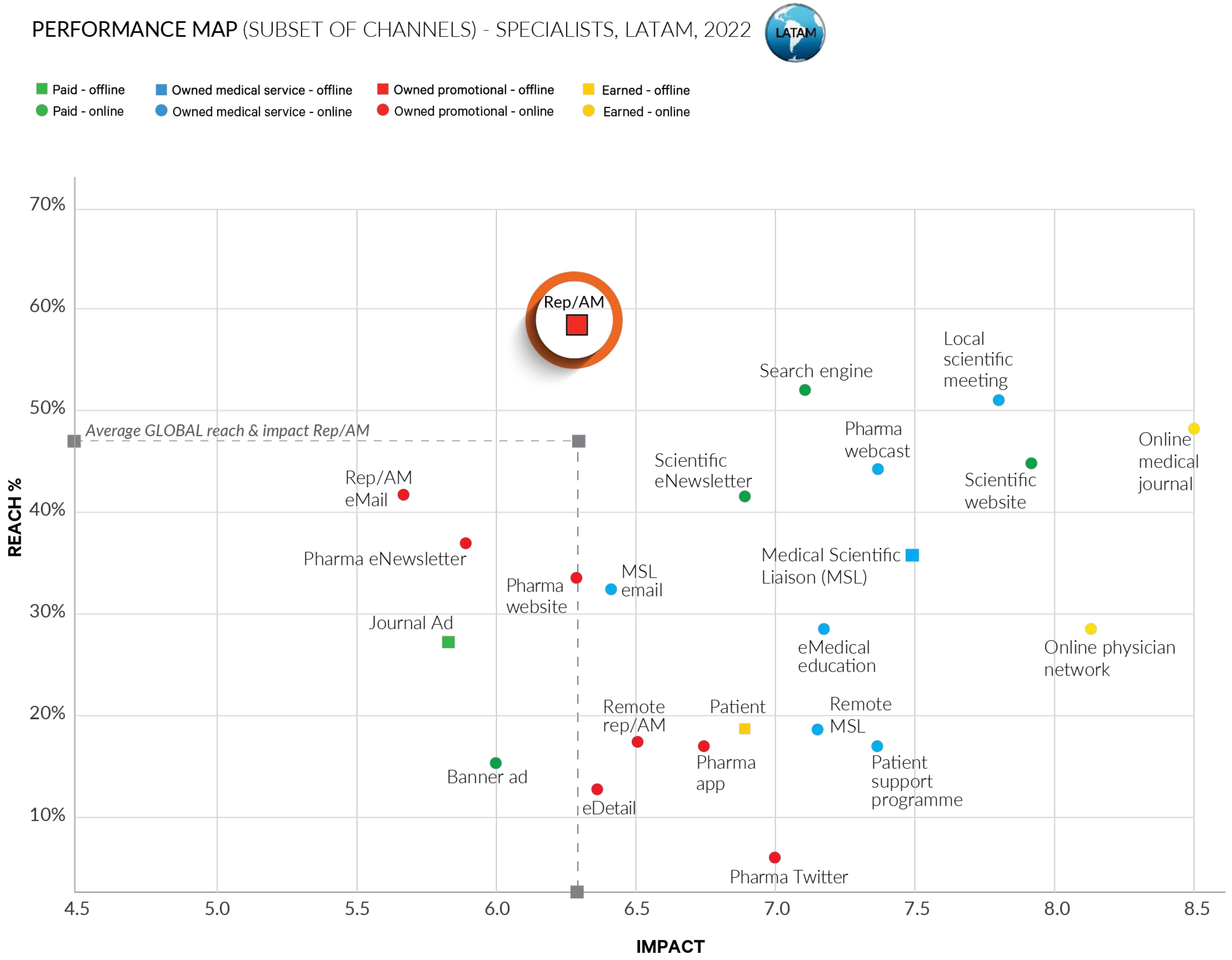
Comparing regions, we see that LATAM shows a remarkably higher reach for their F2F reps (but not for MSLs), with APAC showing the lowest reach for both reps and MSLs (perhaps because the China research coincided with a new series of Covid lockdowns in that country). Despite these differences, the impact of both channels remains remarkably consistent across all four regions. In general, channels tend to be regarded as more impactful by LATAM specialists, and less impactful in the US.

PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, APAC, 2022



Source: Navigator365™ Core, APAC, all specialists, 2022 (n=796)

PERFORMANCE MAP (SUBSET OF CHANNELS) - SPECIALISTS, LATAM, 2022



Source: Navigator365™ Core, LATAM, all specialists, 2022 (n=482)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

THE DIGITAL DIVIDE

The **digital divide** assesses whether biopharma is meeting specialists' channel preferences on both promotional and 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).

For all four regions, demand for omnichannel is still outstripping supply, and while the divide is smaller for commercial vs education, even in promotional efforts there is clearly still room for improving biopharma supply, particularly in APAC and LATAM. The much larger divide for education confirms there is a strong opportunity for biopharma's Medical Affairs teams.

DIGITAL DIVIDE - PROMOTIONAL	US 2021	US 2022	EU5 2021	EU5 2022	APAC 2021	APAC 2022	LATAM 2021	LATAM 2022
	n=2071	n=2208	n=5041	n=4718	n=734	n=796	n=1075	n=482
HCPs preferring digital or mix	49%	49%	54%	55%	70%	63%	61%	59%
epharma reach	35%	33%	41%	38%	30%	35%	42%	38%
DIGITAL DIVIDE	14%	16%	13%	17%	40%	28%	19%	21%

DIGITAL DIVIDE - EDUCATIONAL	US 2021	US 2022	EU5 2021	EU5 2022	APAC 2021	APAC 2022	LATAM 2021	LATAM 2022
	n=2071	n=2208	n=5041	n=4718	n=734	n=796	n=1075	n=482
HCPs preferring digital or mix	63%	64%	68%	69%	78%	73%	73%	73%
epharma reach	27%	25%	35%	33%	28%	24%	43%	36%
DIGITAL DIVIDE	36%	39%	33%	36%	50%	49%	30%	37%

*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')***

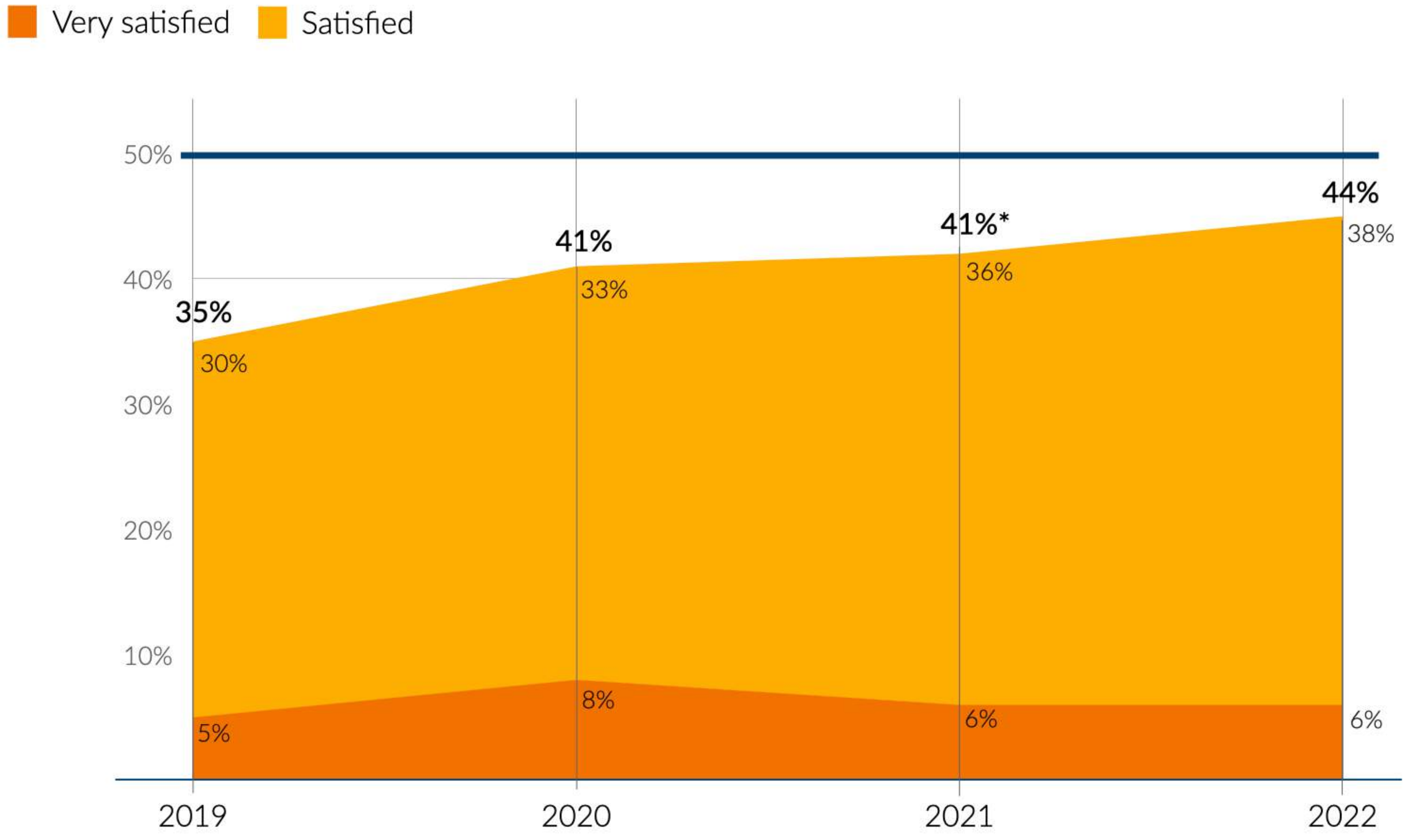
Source: Navigator365™ Core, all specialists, consolidated data

HIGHLIGHT

HCP SATISFACTION WITH BIOPHARMA'S DIGITAL OFFERINGS IS SLOWLY INCREASING, BUT OVER HALF OF SPECIALISTS REMAIN DISSATISFIED OR NEUTRAL

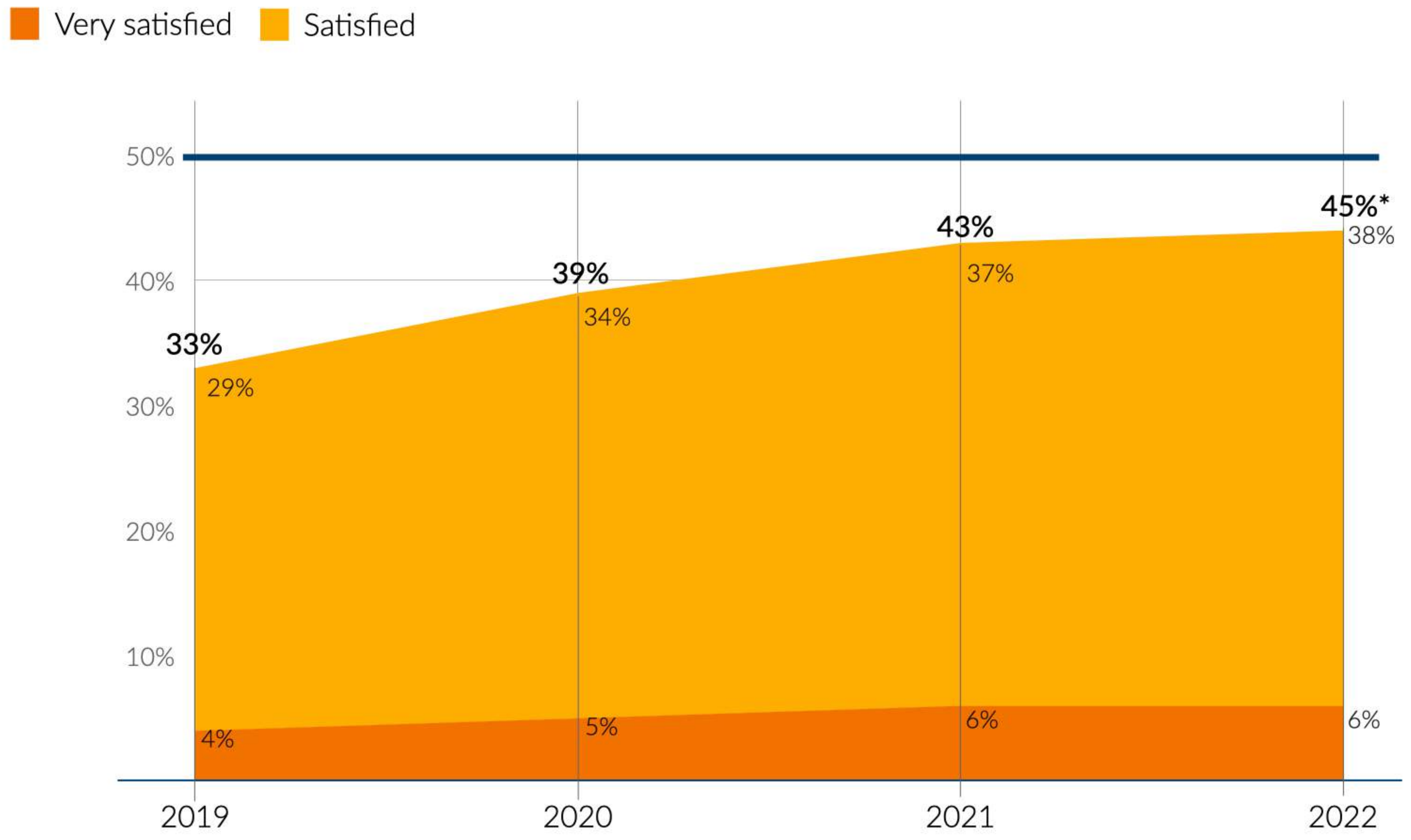
Taking specialists in the US as an example, we see a strong pandemic-related increase in satisfaction in 2020, followed by a much smaller increase in the years after; at the same time, however, over half of HCPs remain dissatisfied or neutral with biopharma's digital efforts. Combined with the fact that the proportion of HCPs describing themselves as "very satisfied" has remained very small, this shows there is still significant room for improvement. This trend is remarkably similar for EU5.

SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, US, 2019-2022



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

SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, EU5, 2019-2022



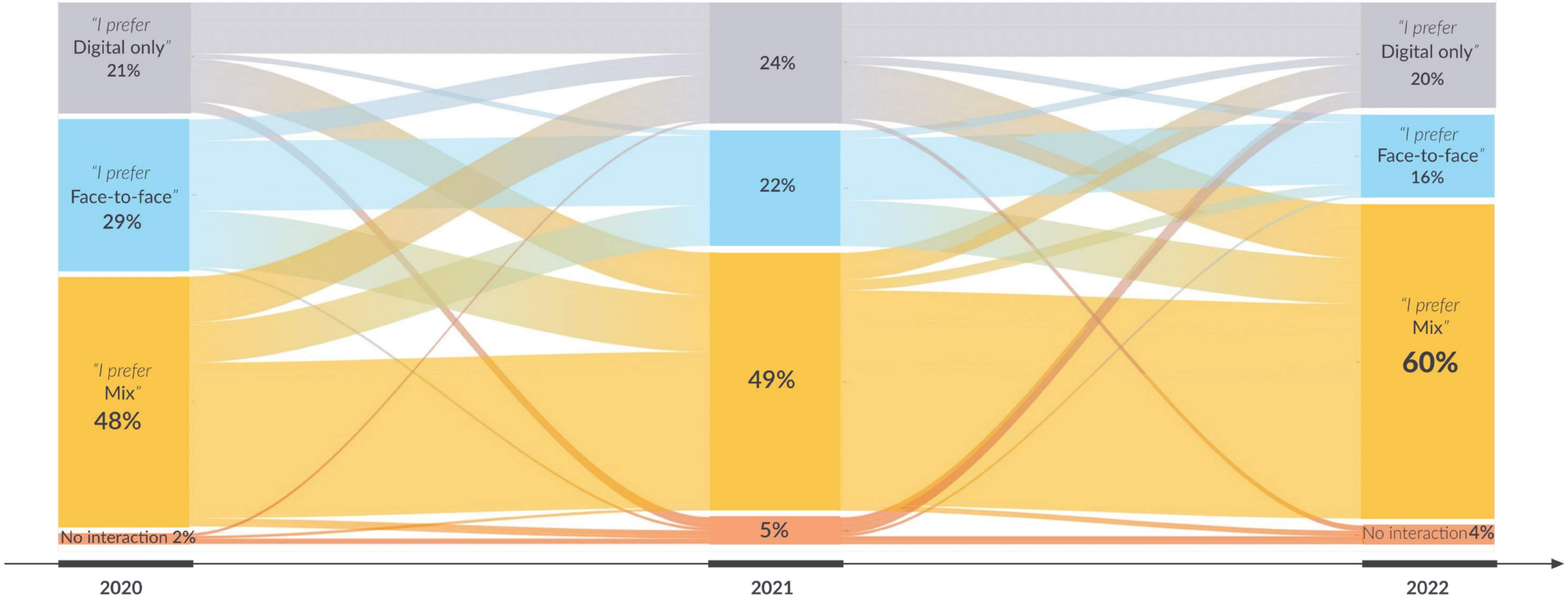
**Total due to rounding*
Source: Navigator365™ Core, EU5 specialists, 2019 (n=4885), 2020 (n=5529), 2021 (n=5041) and 2022 (n=4718)

HIGHLIGHT

UK SPECIALISTS' PREFERENCE FOR F2F ENGAGEMENT ONLY CONTINUES TO DECLINE WHILE ALMOST TWO-THIRDS PREFER AN OMNICHANNEL (MIX) APPROACH

The Navigator365™ Core database can track (anonymized) individual respondents who participated in multiple waves, revealing considerable dynamics over time – as illustrated by this Sankey diagram showing data from UK specialists. While the digital-only segment remains stable at all three timepoints, the F2F group shows a decline vs 2020. More importantly, the "mix" group has expanded strongly, again confirming the burning platform for omnichannel engagement to create and sustain a superior customer experience.

HCP PREFERENCES FOR (COMMERCIAL) COMMUNICATION WITH BIOPHARMA OVER TIME – SPECIALISTS, UK 2020–2022



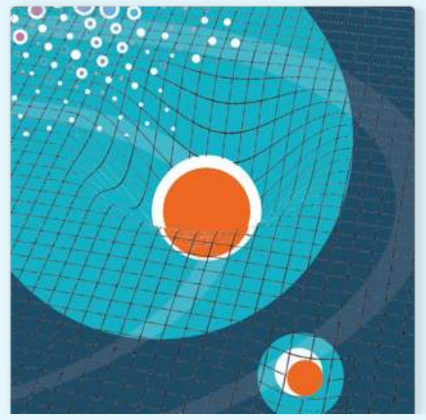
Each line running from left to right represents a respondent's preferred format of engagement with pharma (commercial). A straight line indicates that the respondent's preference stayed the same at all three timepoints. For those respondents whose preference did change, you can follow their trajectories through the three timepoints.

Source: Navigator365™ Core, UK specialists, 2020–2022 (n=195)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

2. INDUSTRY
performance

POWERED BY Maturometer™



INDUSTRY
performance

OMNICHANNEL MATURITY: THE FOUR DIMENSIONS OF SUCCESSFUL CHANGE

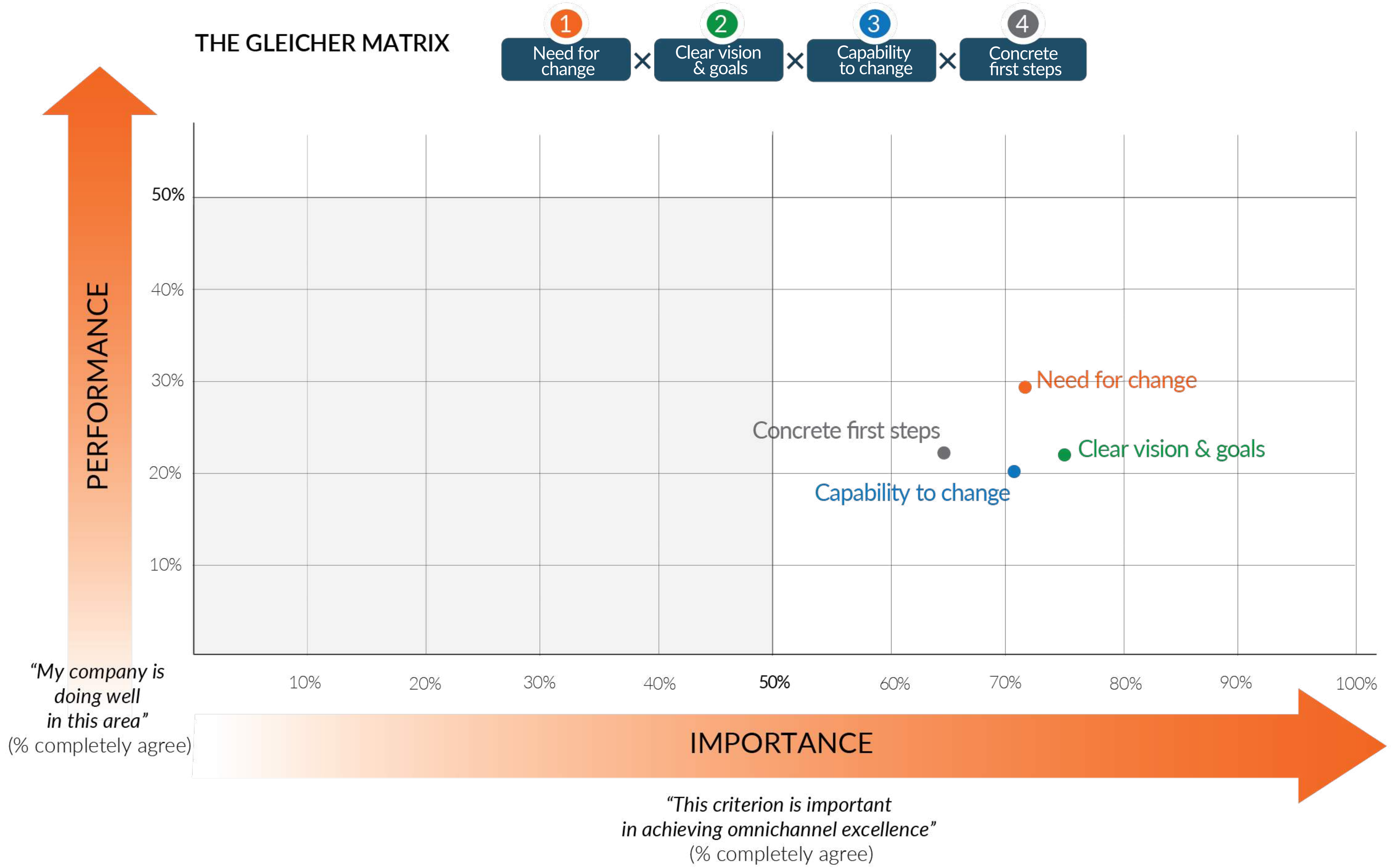
Gleicher states there are four key drivers or dimensions for successful change, and they all need to be present in order to ensure robust and lasting change. Even if only one of the four is missing, the result will be subpar. In the following pages we look at how colleagues in the biopharma industry in three regions (US, EU and APAC) rate these dimensions – or more accurately, the individual component enablers within them – in terms of importance vs current performance.

In general, the industry understands the importance of the requirements to change (the US respondents create a rather more distinct regional picture), but still has a way to go when it comes to performing well on most items.

1		2		3		4		
Need for change	×	Clear vision & goals	×	Capability to change	×	Concrete first step	=	Successful change
	×	Clear vision & goals	×	Capability to change	×	Concrete first step	=	Slow start
Need for change	×		×	Capability to change	×	Concrete first step	=	Lack of coordination
Need for change	×	Clear vision & goals	×		×	Concrete first step	=	Frustration
Need for change	×	Clear vision & goals	×	Capability to change	×		=	Lack of action

Variation of Gleicher's Formula. Source: Dannemiller and Jacobs, Changing the way organizations change. A revolution of common sense. The Journal of Applied Behavioural Science (1992)

THE GLEICHER MATRIX



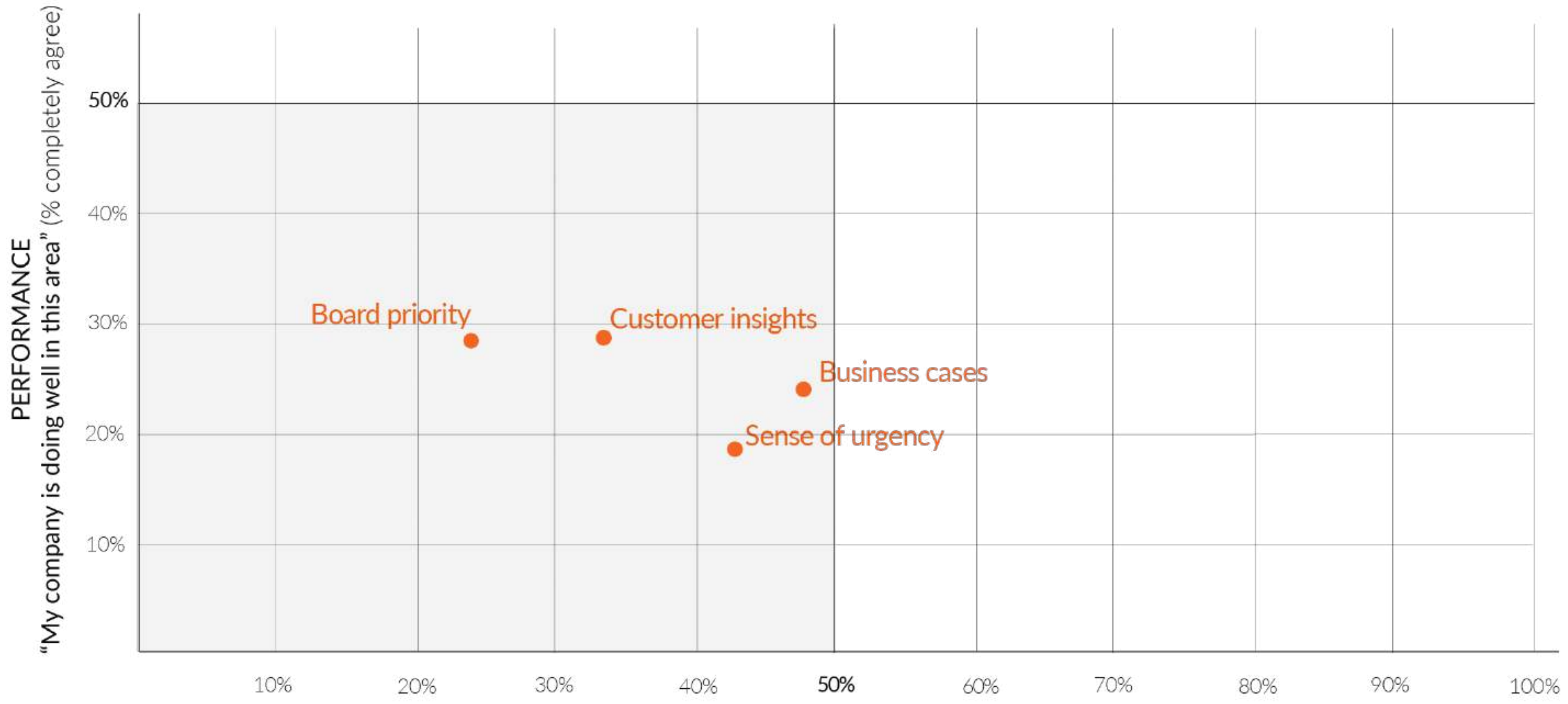
Source: Maturometer™ 2022, EU Biopharma (n=217)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

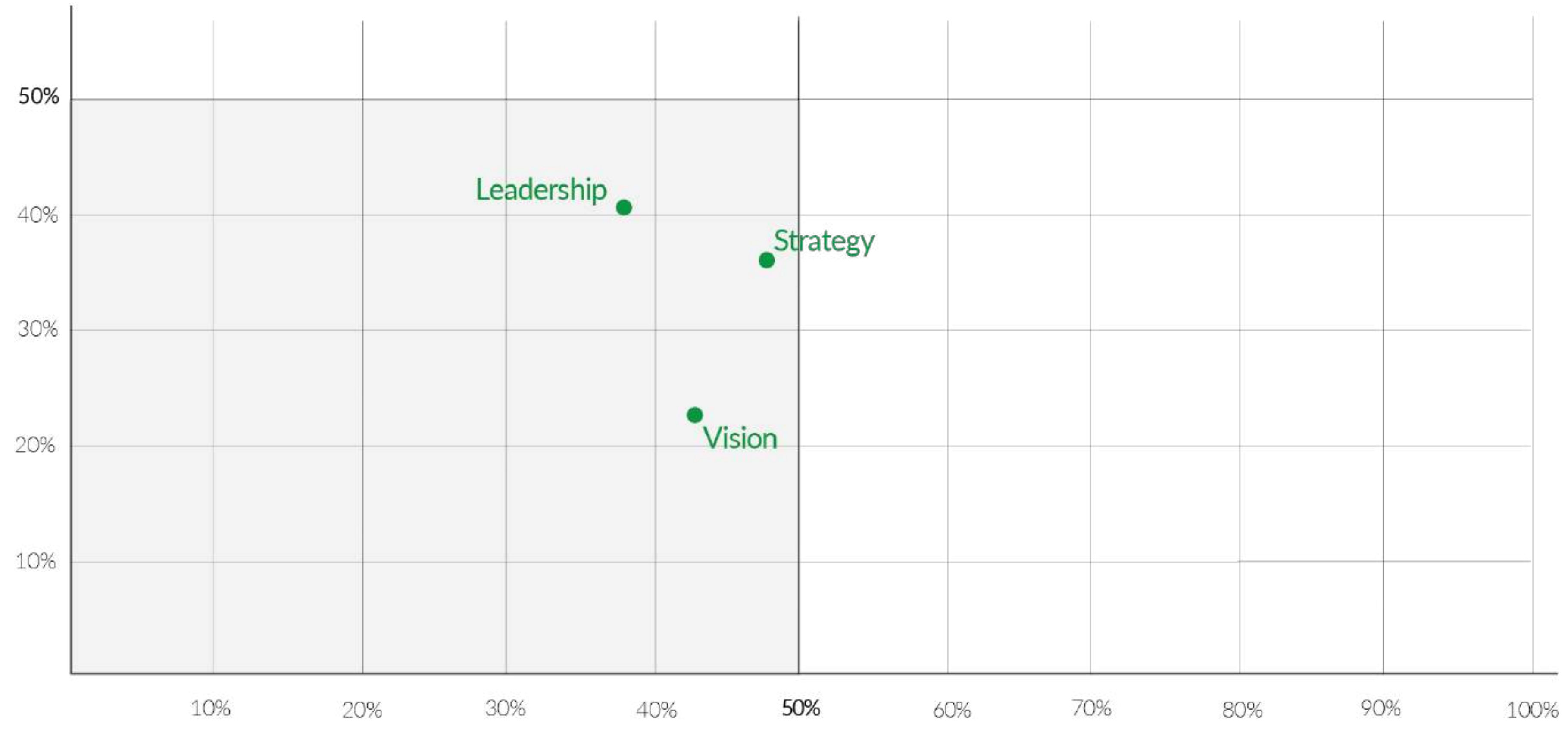
MATURITY: US

Compared with EU and APAC respondents, US respondents tend to assign a lower importance to almost all dimensions and enablers (most datapoints tend to sit to the left of the charts) while commonly (but not always) rating themselves higher in terms of performance.

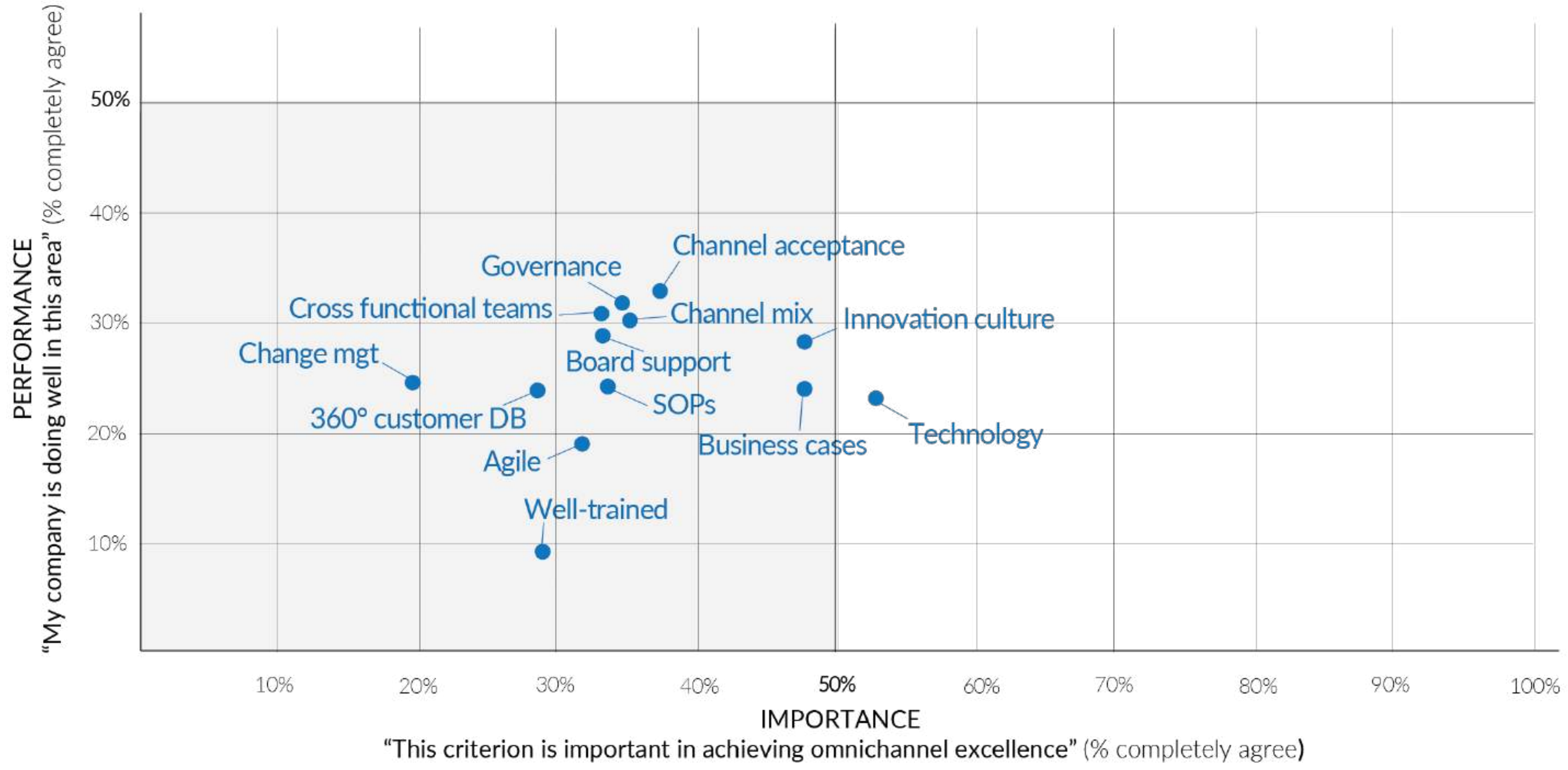
GLEICHER MATRIX: **THE NEED FOR CHANGE** - BIOPHARMA, US, 2022



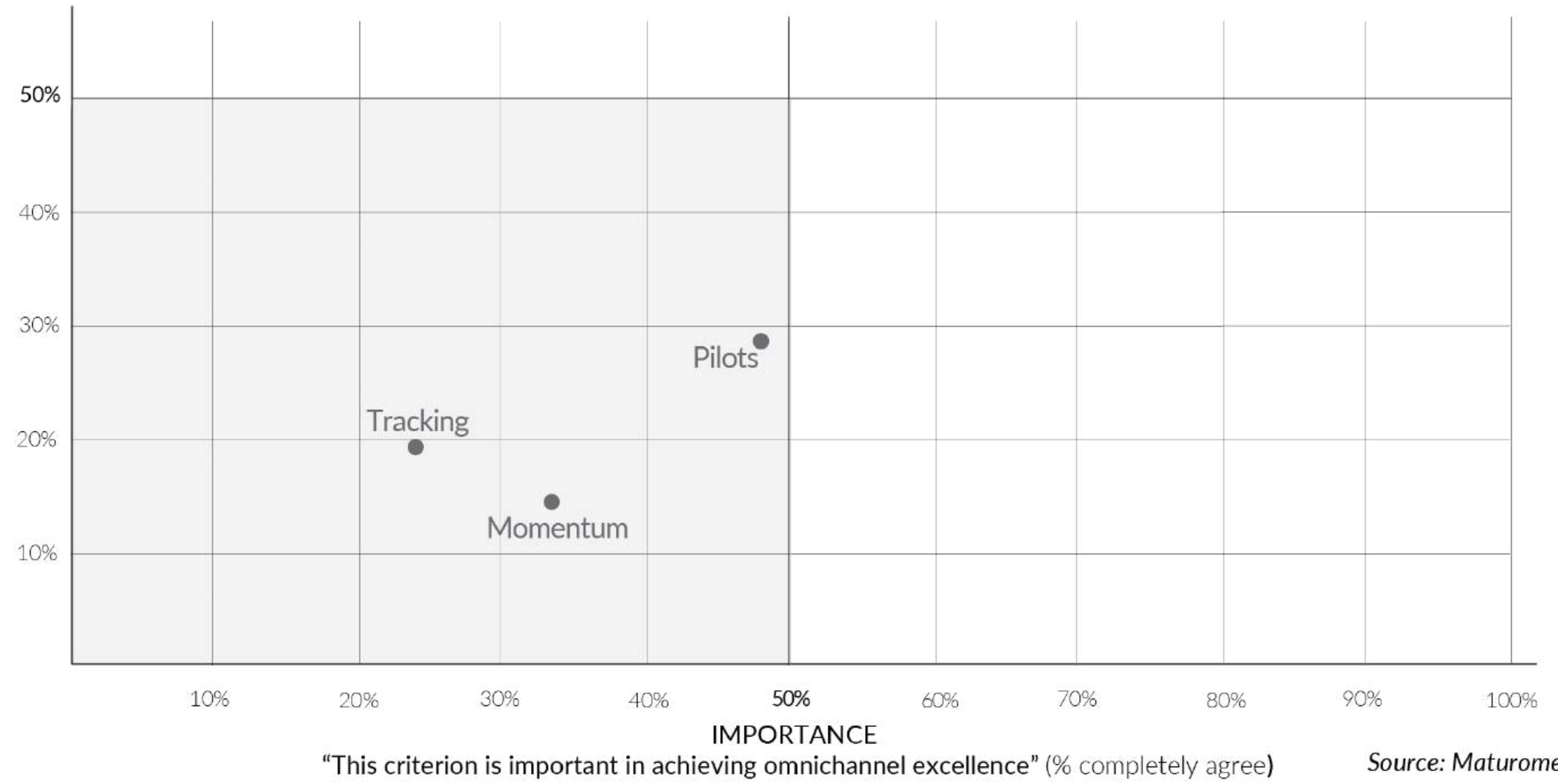
GLEICHER MATRIX: **VISION & GOALS** - BIOPHARMA, US, 2022



GLEICHER MATRIX: **CAPABILITY TO CHANGE** - BIOPHARMA, US, 2022



GLEICHER MATRIX: **FIRST STEPS** - BIOPHARMA, US, 2022

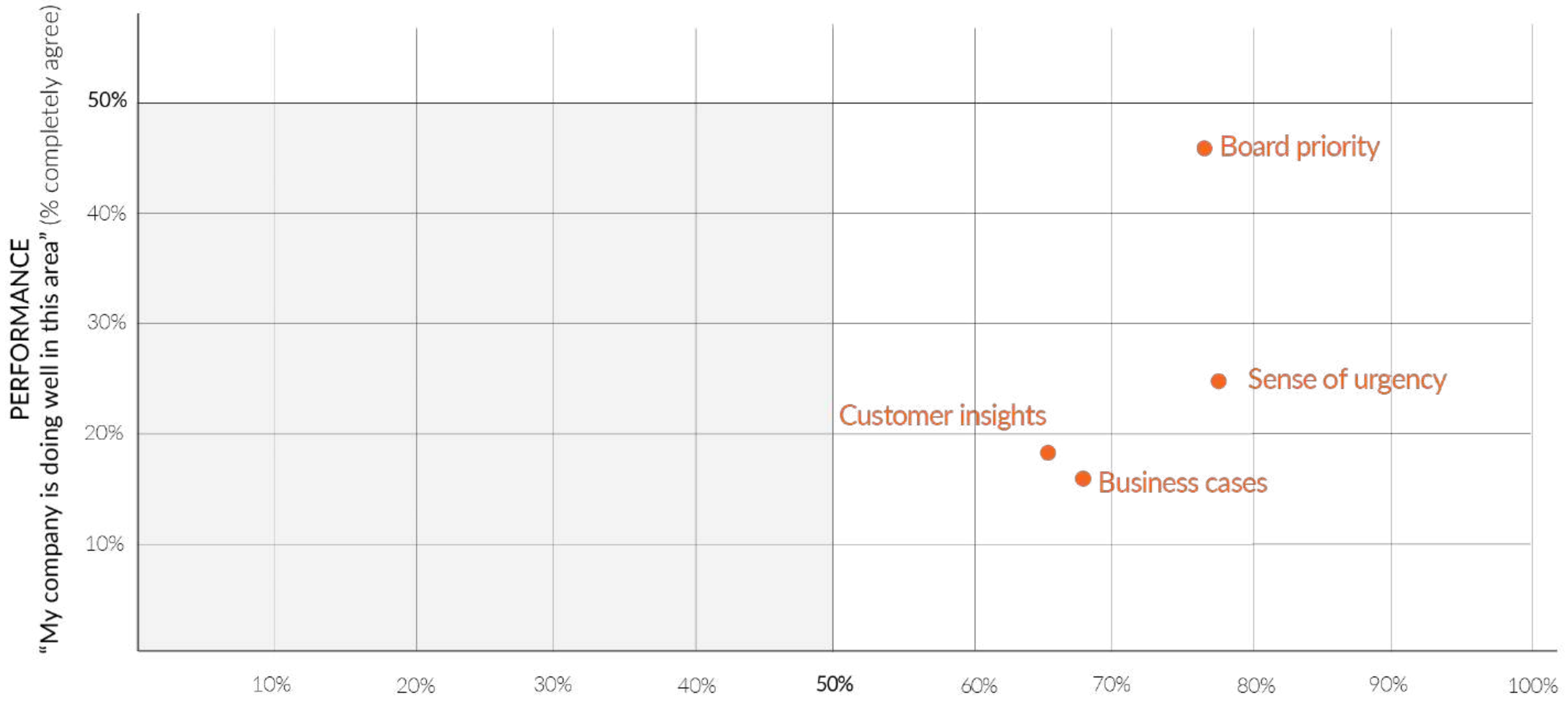


Source: Maturometer™ 2022, US Biopharma (n=21)

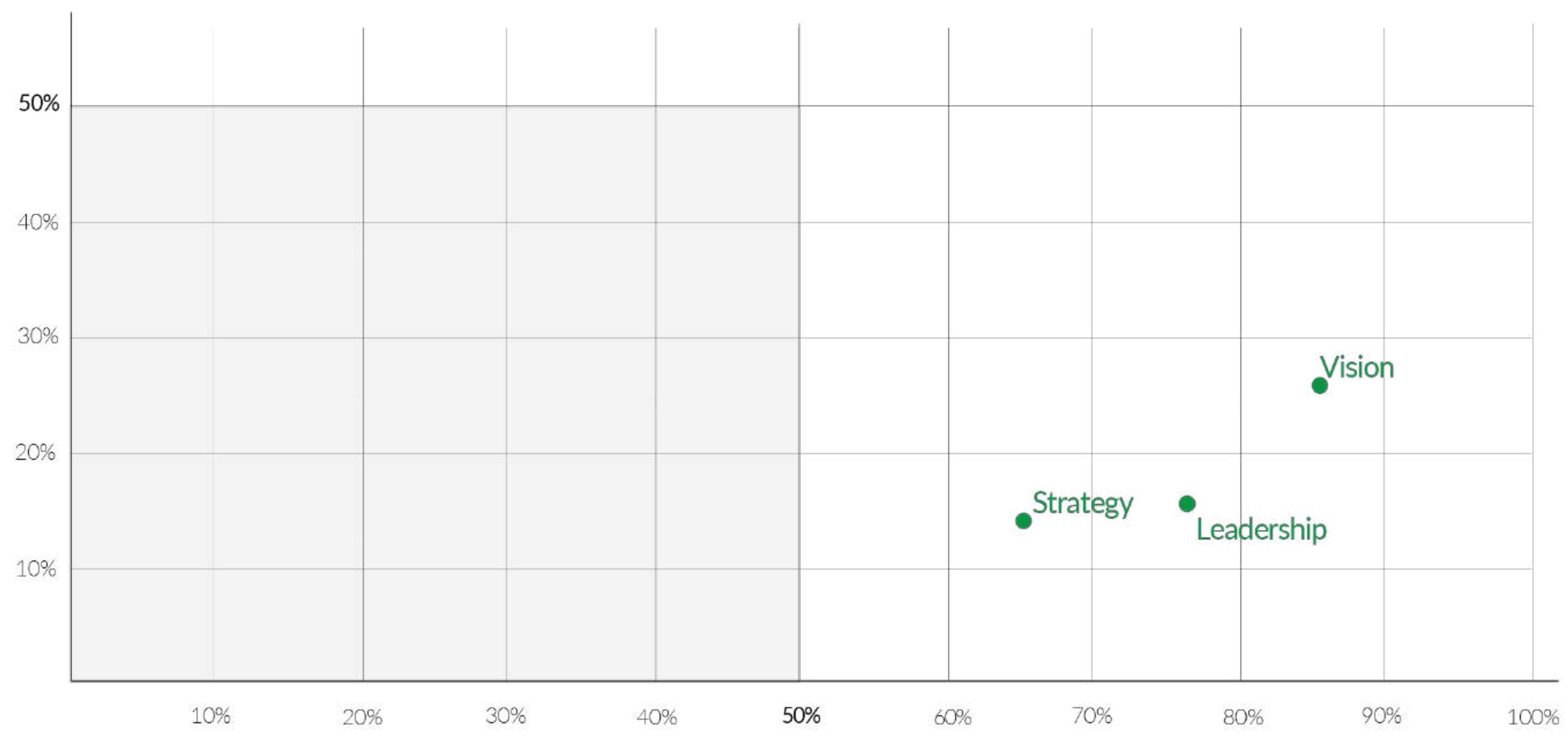
MATURITY: EUROPE

In contrast to the US, the European datapoints tend to sit further to the right on the charts, indicating that respondents attach a higher importance to the key levers for successful change. However, what the EU biopharma industry finds important is not what the industry is performing well on. While the strong Board priority is encouraging, most datapoints tend to sit nearer the bottom of the charts, indicating a poorer evaluation of achievement so far.

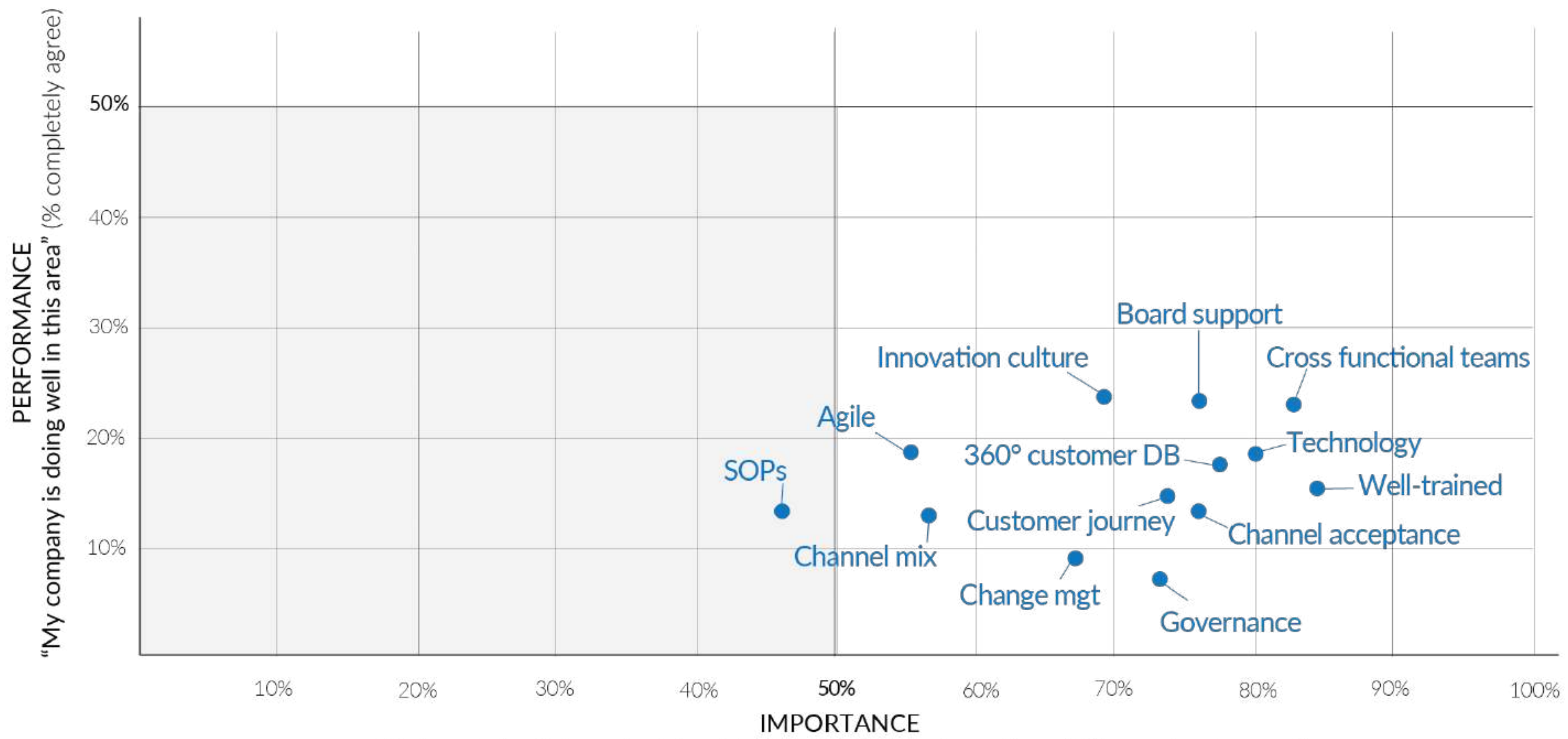
GLEICHER MATRIX: **THE NEED FOR CHANGE -** BIOPHARMA, EU, 2022



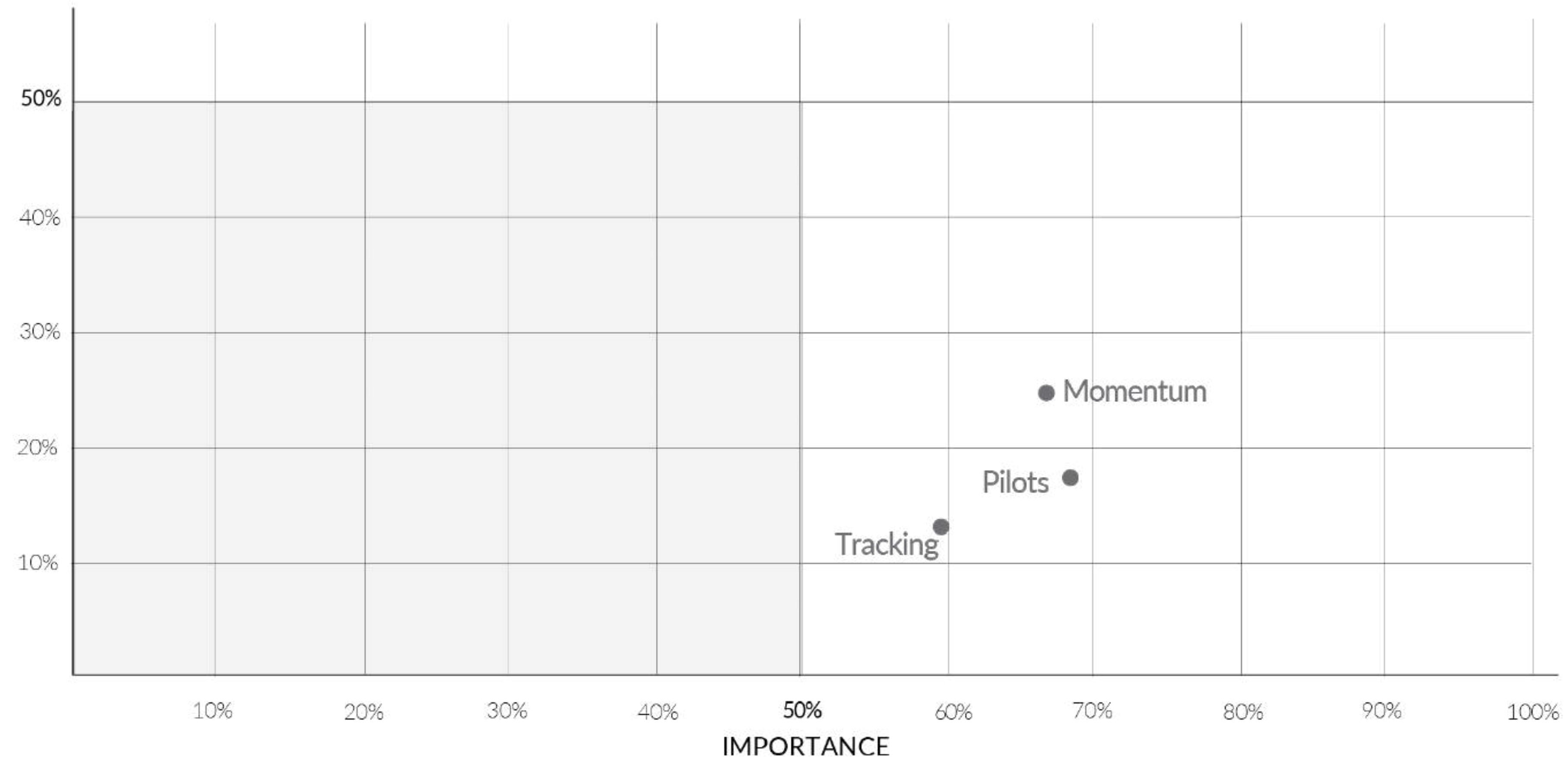
GLEICHER MATRIX: **VISION & GOALS -** BIOPHARMA, EU, 2022



GLEICHER MATRIX: **CAPABILITY TO CHANGE -** BIOPHARMA, EU, 2022



GLEICHER MATRIX: **FIRST STEPS -** BIOPHARMA, EU, 2022

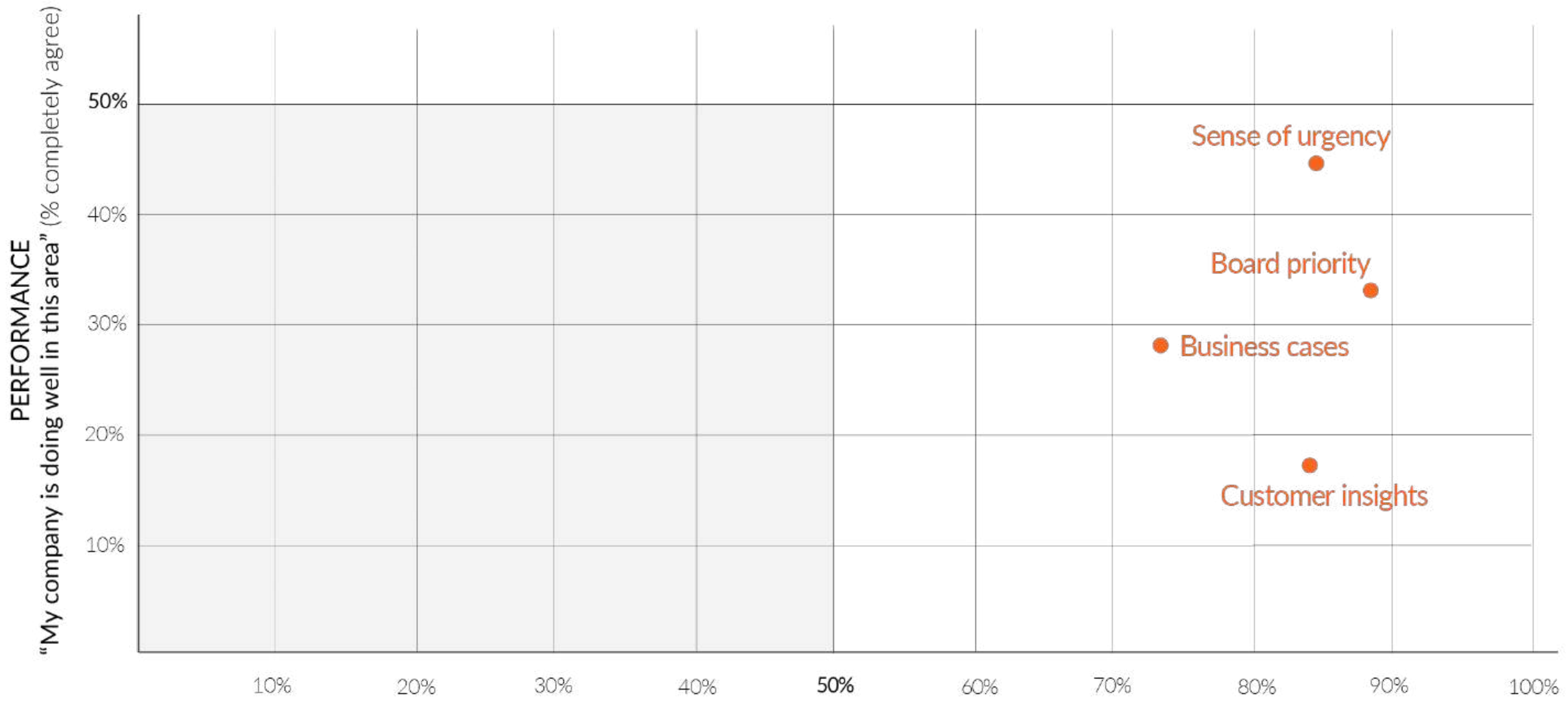


Source: Maturometer™ 2022, EU Biopharma (n=127)

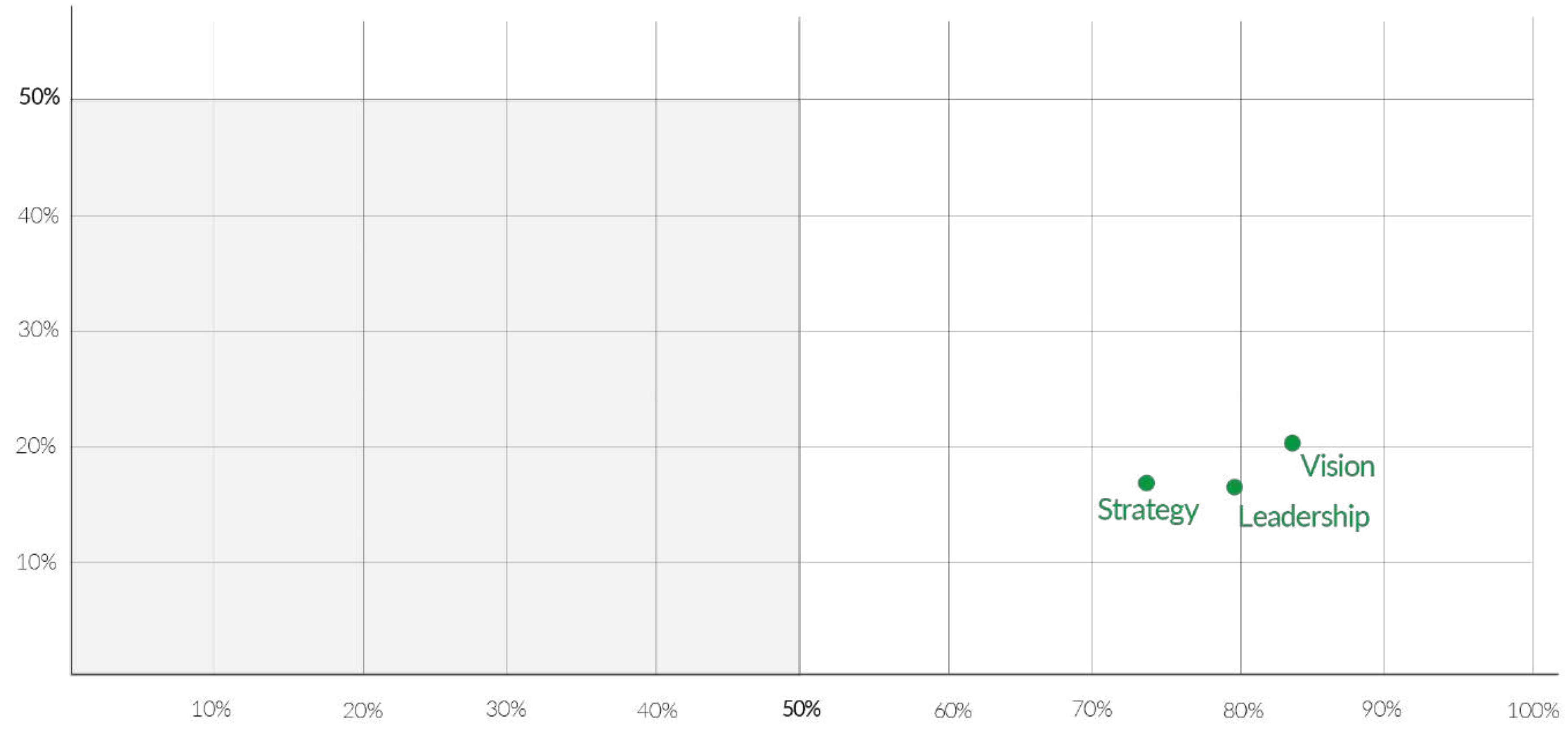
MATURITY: APAC

The picture in APAC is similar to that of Europe, with perhaps an even more modest evaluation of achievement. Here one of the highest performing enablers is a strong sense of urgency in terms of the need for change. Like Europe, the industry in this region struggles to take the first steps to achieving the vision and strategy.

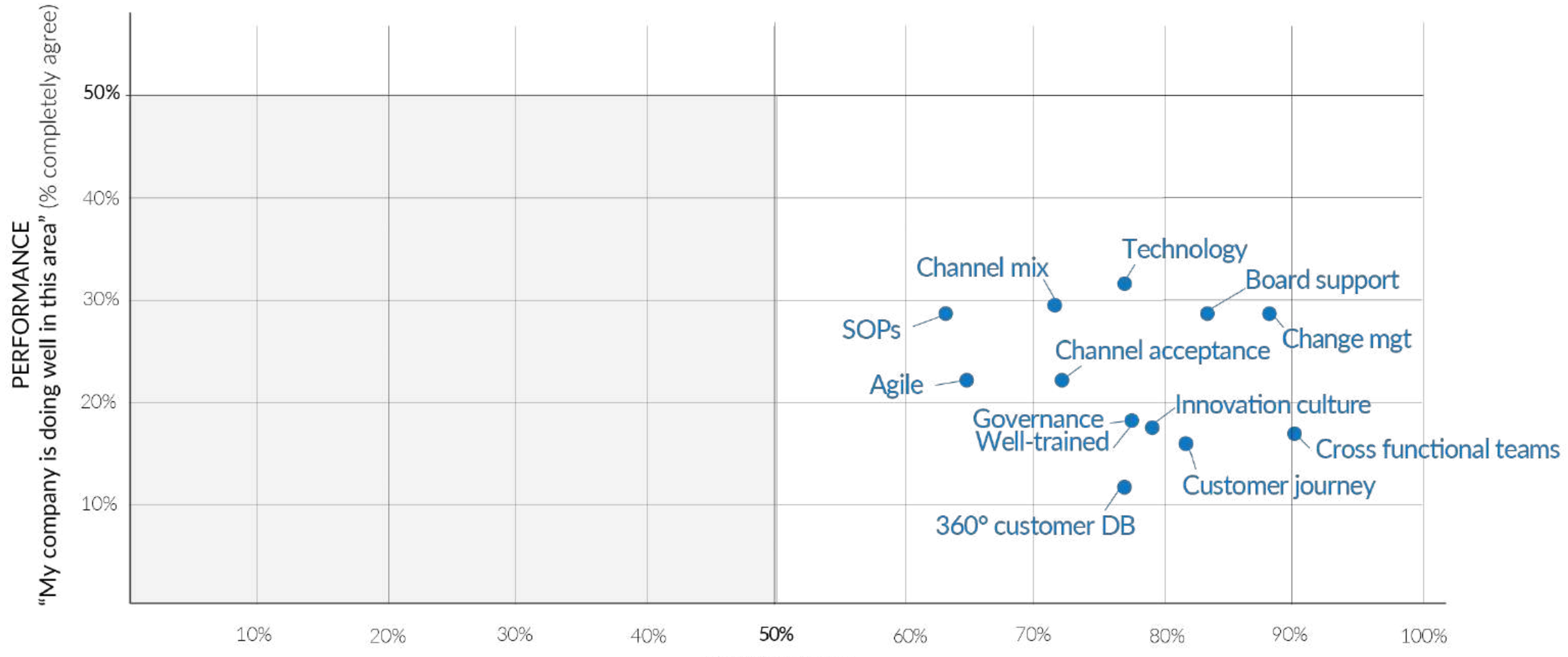
GLEICHER MATRIX: **THE NEED FOR CHANGE** - BIOPHARMA, APAC, 2022



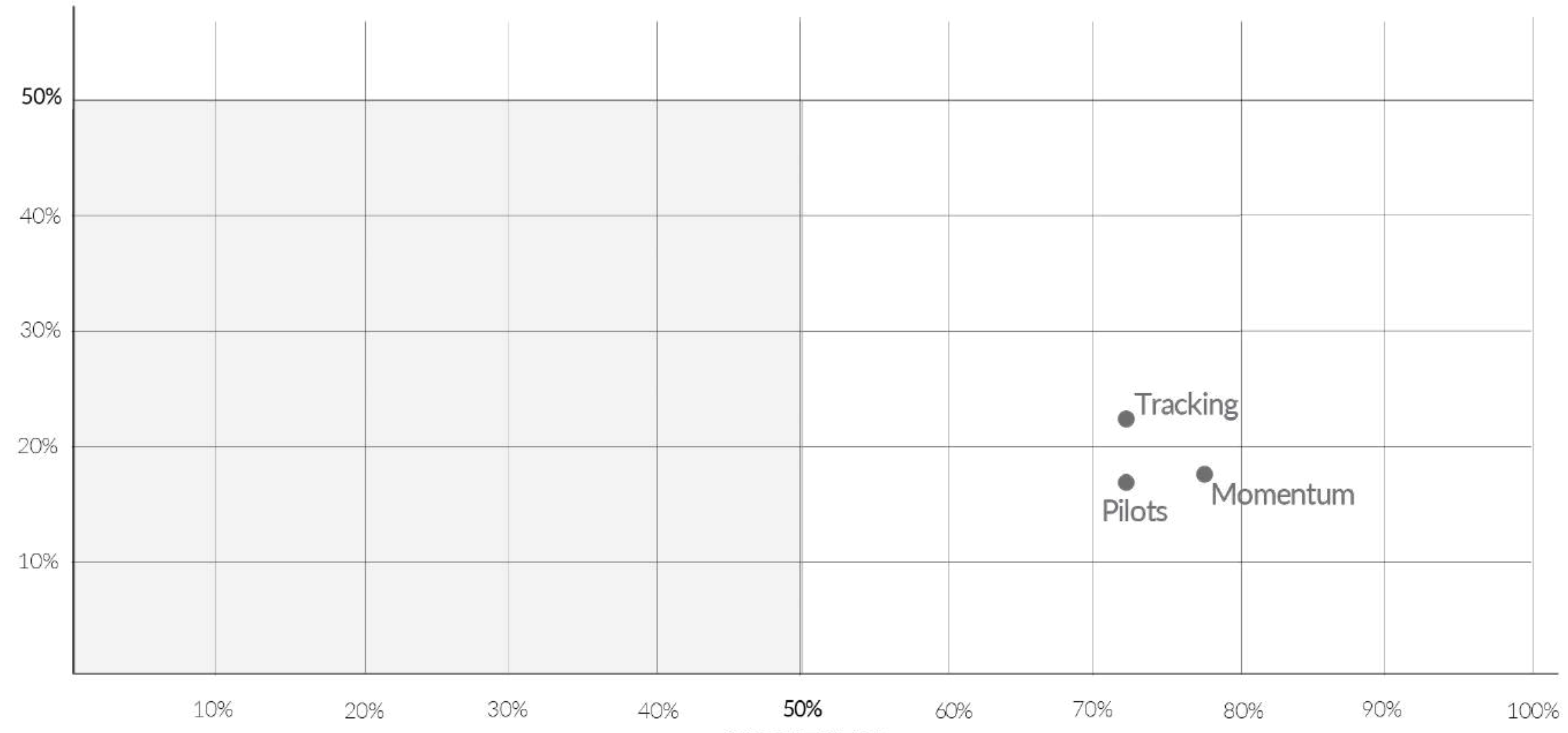
GLEICHER MATRIX: **VISION & GOALS** - BIOPHARMA, APAC, 2022



GLEICHER MATRIX: **CAPABILITY TO CHANGE** - BIOPHARMA, APAC, 2022



GLEICHER MATRIX: **FIRST STEPS** - BIOPHARMA, APAC, 2022



Source: Maturometer™ 2022, APAC Biopharma (n=18)

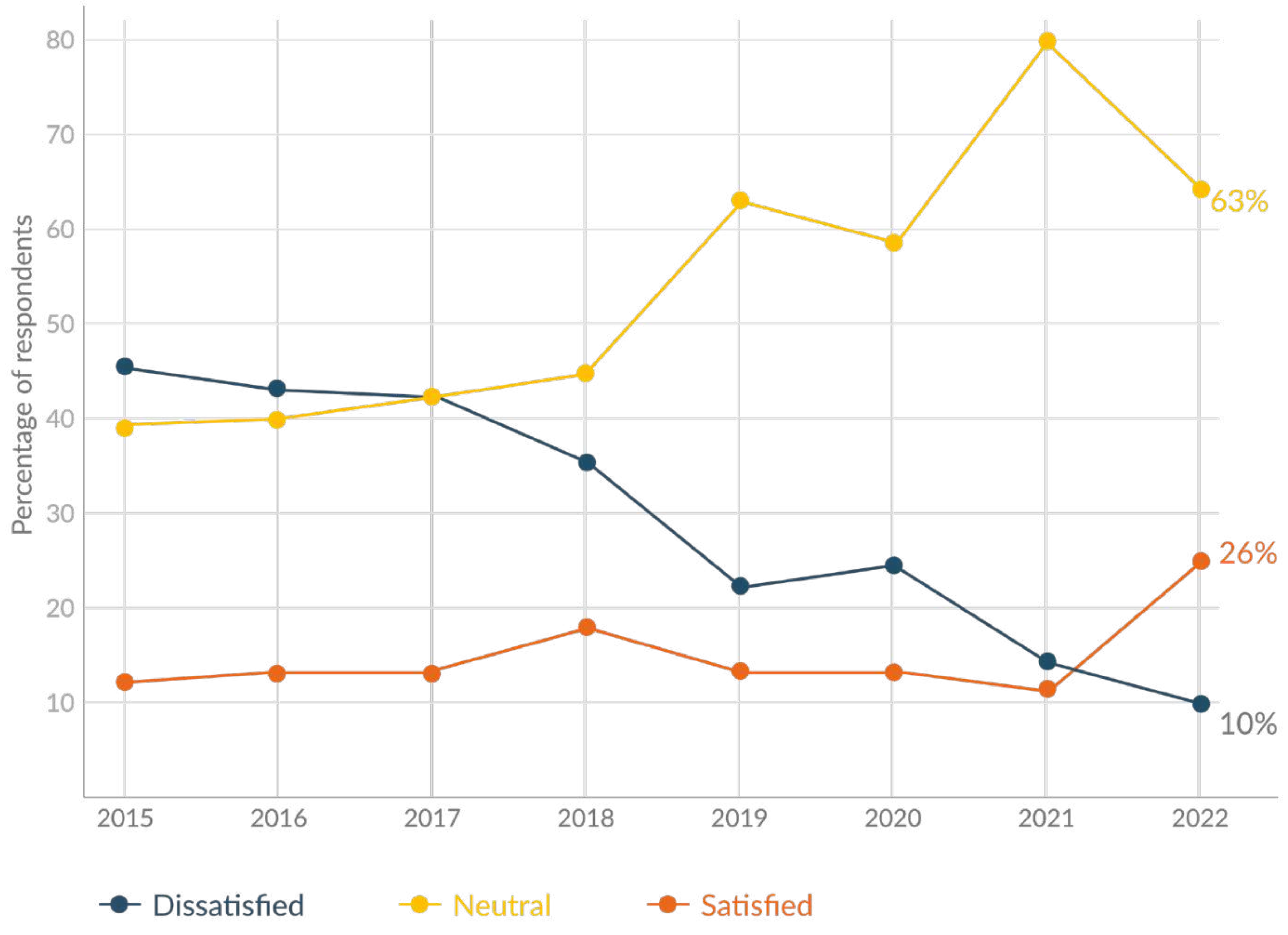
NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

BIOPHARMA SATISFACTION WITH ITS OWN DIGITAL EFFORTS AND DIGITAL BUDGETS

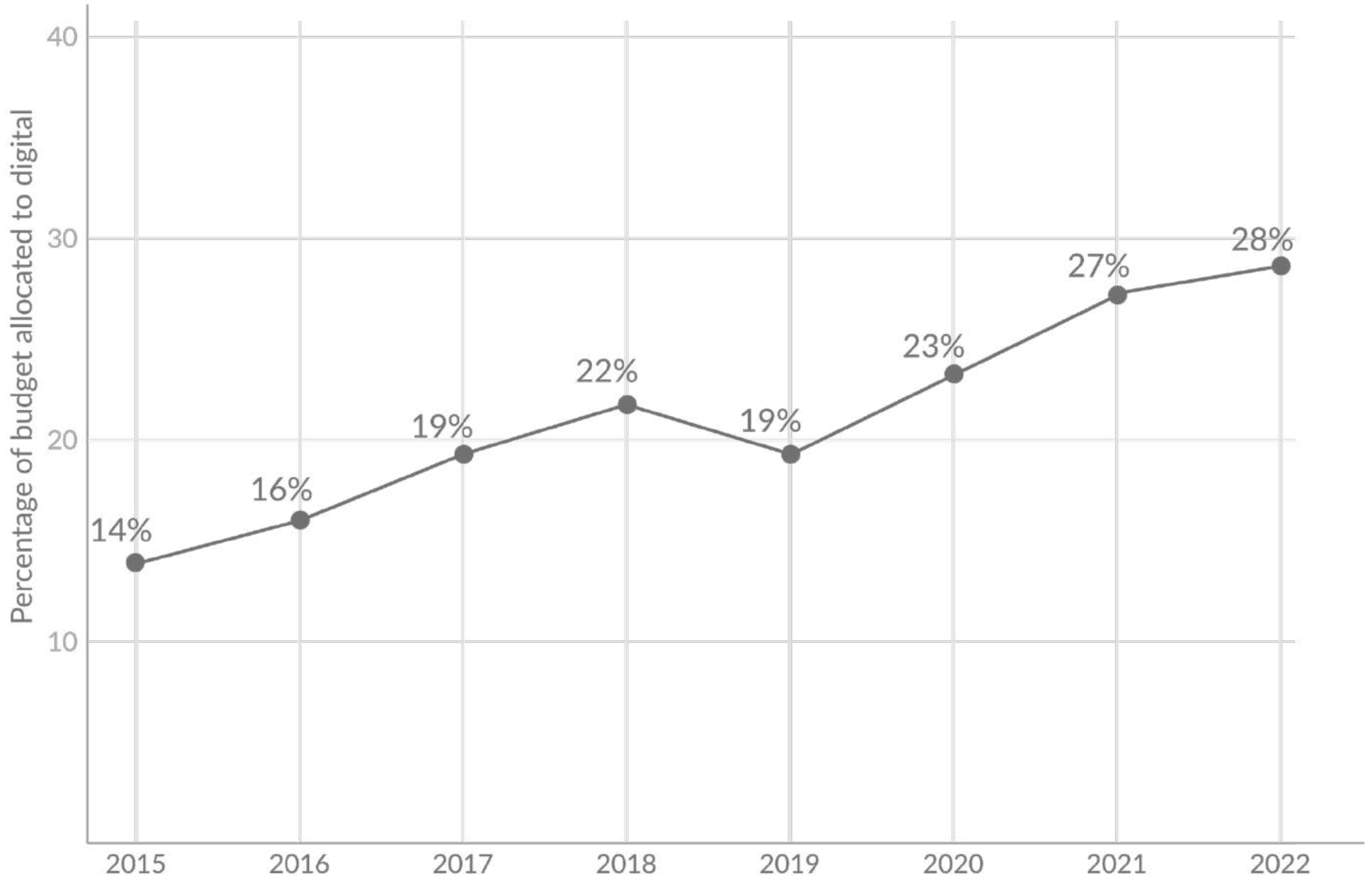
It has taken a number of years but biopharma colleagues' satisfaction with their own digital offerings finally had a bit of a boost in 2022, more than doubling from 11% to 26%. While this is certainly cause for encouragement, almost three-quarters of colleagues remain either neutral about or unhappy with biopharma's digital efforts – a sign that the industry knows there's still plenty of room for improvement. In addition, as we've seen, HCP satisfaction levels are barely increasing, so there are no grounds for complacency.

Meanwhile, digital budgets seem to be levelling off after a few straight wins since 2019 – but is this good enough (considering the average B2B spend on digital is around 50% of marketing budget)? As the Gleicher plots have shown, the industry as a whole is struggling to take those essential first steps, and the relatively small budgets are likely contributing to this inability to achieve the vision and strategy. So it is perhaps no surprise to see that most respondents remain on the fence when it comes to satisfaction in their own digital offerings.

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



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



Source: Maturometer™ 2022, EU Biopharma (n=127)

HIGHLIGHT

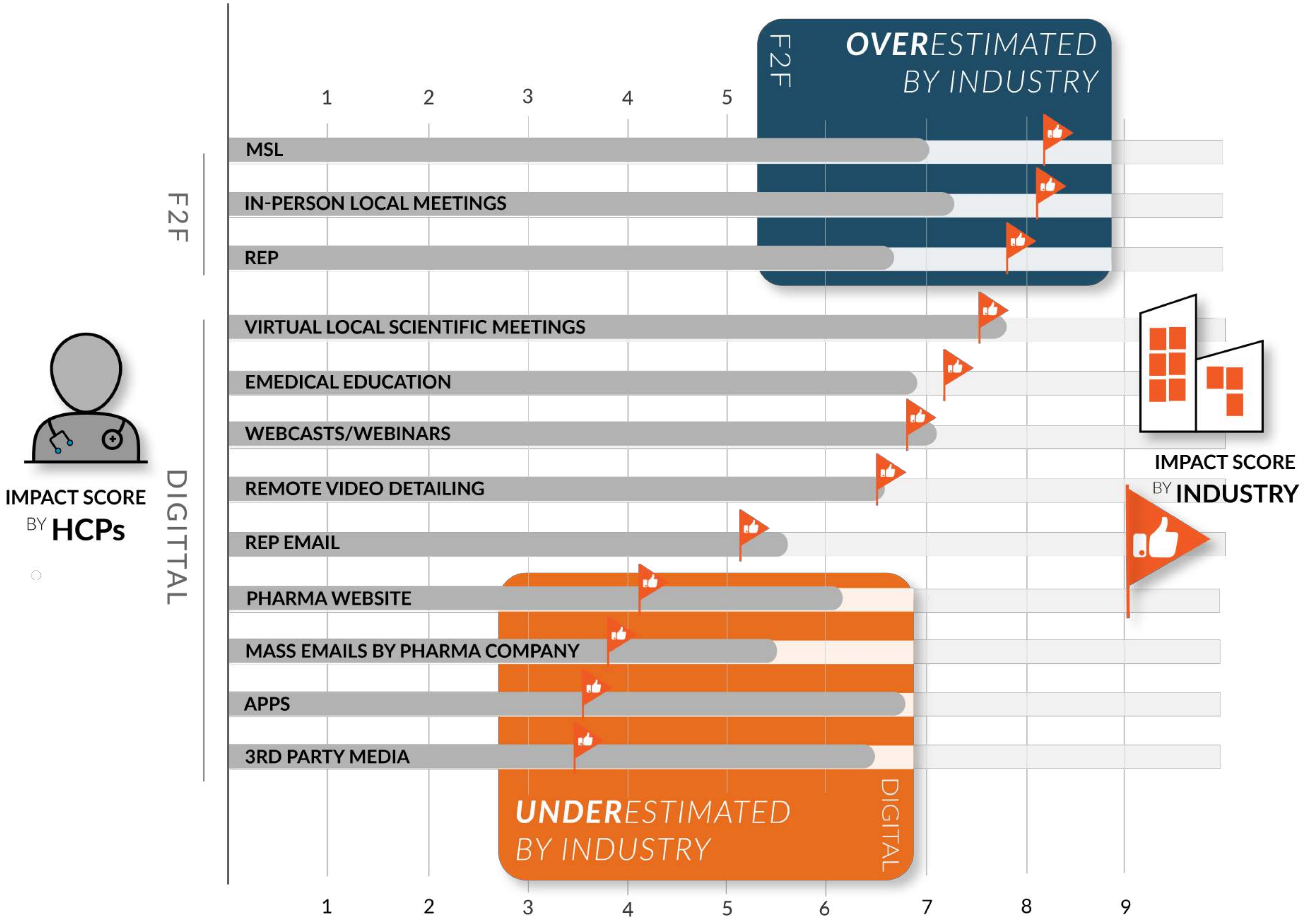
BIOPHARMA CONTINUES TO OVERVALUE THE IMPACT OF F2F CHANNELS WHILE UNDERESTIMATING DIGITAL

When asked to rate various channels (by giving a score of 0–10) in terms of how well they influence HCPs' prescribing behaviour, European biopharma continues to rate the MSL, meetings and rep visits – traditionally the mainstay channels of customer engagement – as the most impactful.

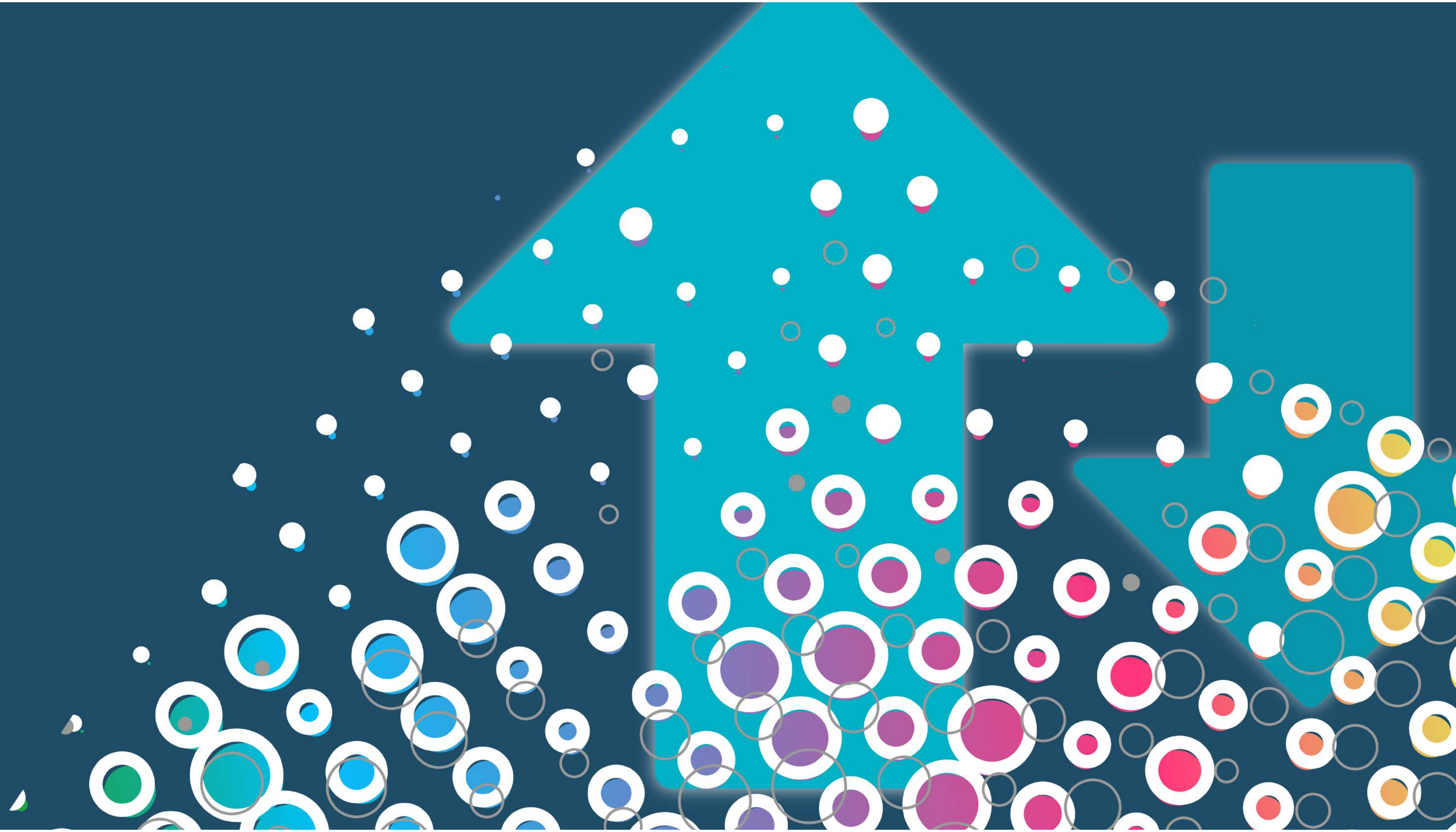
Incorporating corresponding insights from the specialists themselves, however, reveals a disconnect between the impact scores of physicians vs biopharma's estimates. Indeed, biopharma continues to overvalue the impact of 'traditional' F2F channels while significantly underestimating several digital channels – for a handful of channels, specialists and industry are fairly well aligned.

TO WHAT EXTENT DO THESE CHANNELS IMPACT CLINICAL DECISION MAKING?

EU SPECIALIST HCPs vs. EU BIOPHARMA INDUSTRY



Source: Across Health Navigator365™ Core, EU5 Specialists 2022 (n=4718) & Maturometer™ 2022, EU Biopharma (n=127)



3. CHANNEL metrics

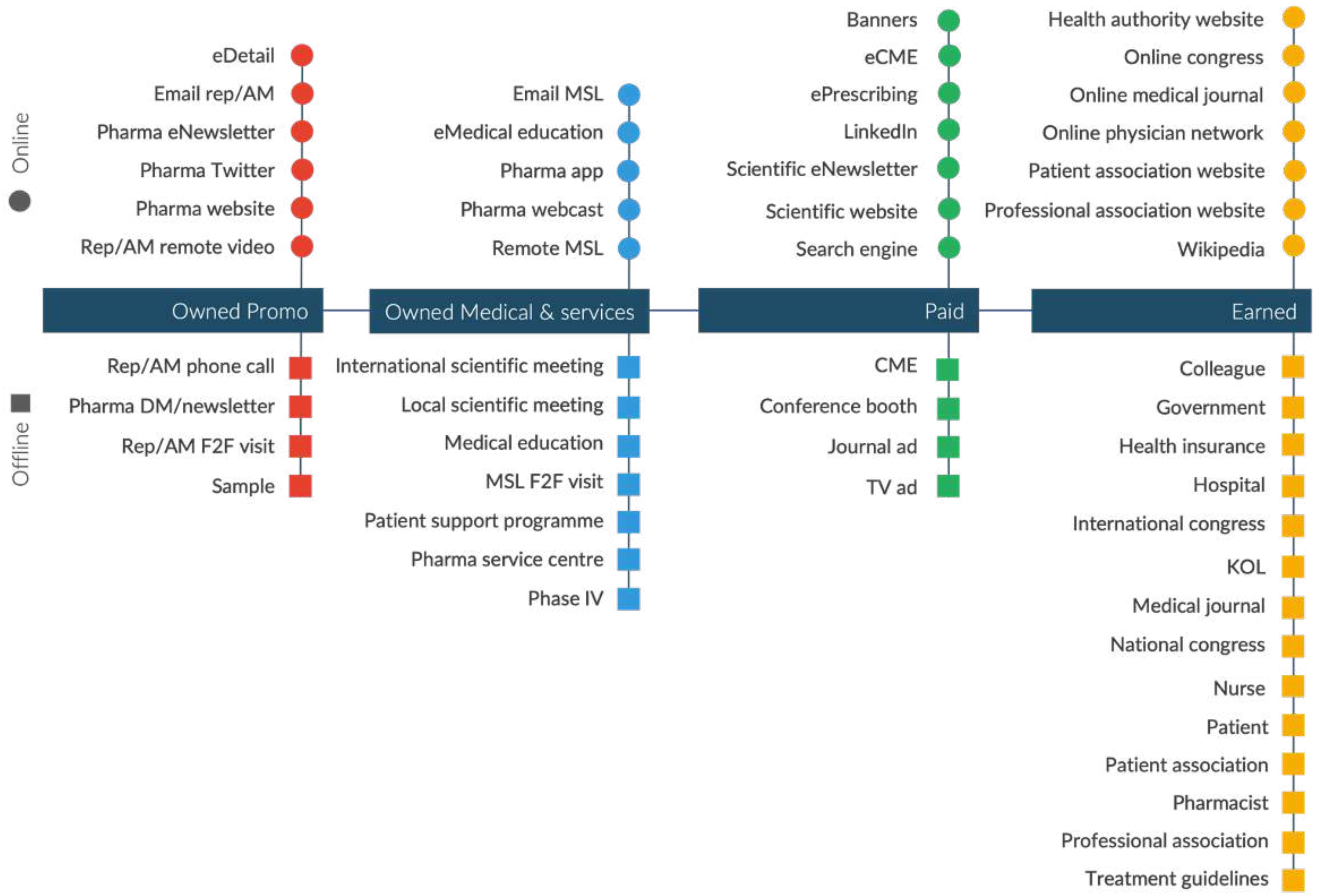
POWERED BY Navigator365™ Core

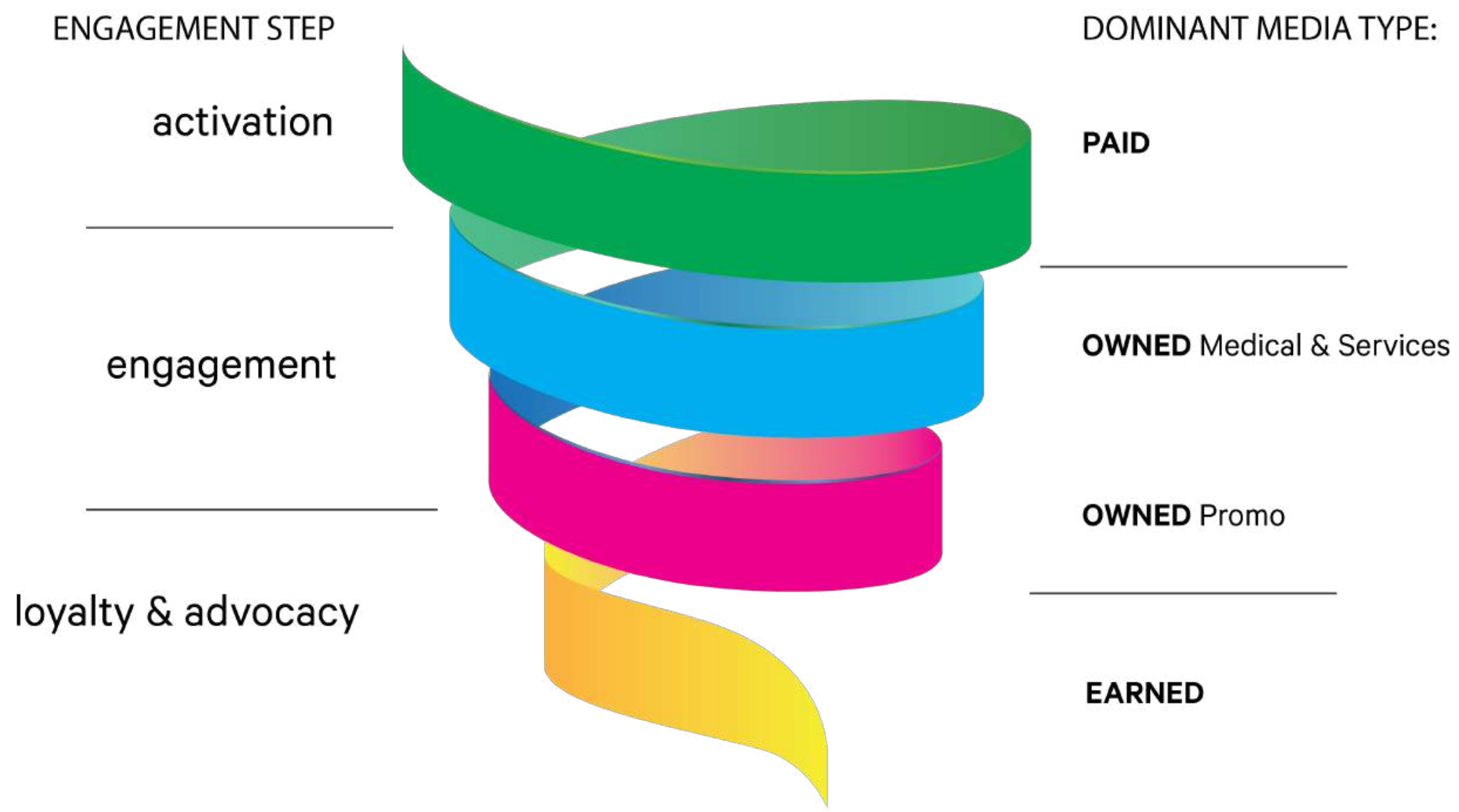
CHANNEL
metrics

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. The Across Health Navigator365™ 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:





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 highest among LATAM HCPs (though not significantly so) where reach is lowest. The US shows the exact opposite, with the lowest impact among the four regions (again, not significantly so) – perhaps not surprising considering the sheer volume of biopharmaceutical advertising in this market.

		Banner	Rep
US (n=2208)	... reach versus...	27%	46%
	... impact versus...	4.8	6.2
	...days between contact versus...	3.4	5.5
EU5 (n=4718)	... reach versus...	18%	49%
	... impact versus...	5.1	6.5
	...days between contact versus...	3.9	5.4
APAC (n=796)	... reach versus...	23%	32%
	... impact versus...	5.3	6.3
	...days between contact versus...	5.3	9.3
LATAM (n=482)	... reach versus...	15%	59%
	... impact versus...	6.0	6.3
	...days between contact versus...	4.8	7.5

Source: Navigator365™ Core, all specialists, 2022

SEARCH ENGINE MARKETING

With search engine marketing, you 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, among APAC HCPs this channel has almost double the reach of the rep. At the other end of the spectrum, LATAM is the only region where this channel has a lower reach than the rep. In addition, frequency is much higher and impact is comparable to the rep across the regions.

		Search engine	Rep
US (n=2208)	... reach versus...	51%	46%
	... impact versus...	6.4	6.2
	...days between contact versus...	2.0	5.5
EU5 (n=4718)	... reach versus...	54%	49%
	... impact versus...	6.6	6.5
	...days between contact versus...	1.8	5.4
APAC (n=796)	... reach versus...	56%	32%
	... impact versus...	6.6	6.3
	...days between contact versus...	2.5	9.3
LATAM (n=482)	... reach versus...	51%	59%
	... impact versus...	7.1	6.3
	...days between contact versus...	1.9	7.5

Source: Navigator365™ Core, all specialists, 2022

EMEDICAL

Leading biopharma companies are increasing 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.

		eMedical education	Webcast		MSL
US (n=2208)		18%	25%	... reach versus...	40%
		6.3	6.5	... impact versus...	6.9
		7.7	11.7	...days between contact versus...	15.3
EU5 (n=4718)		25%	42%	... reach versus...	39%
		6.8	7.0	... impact versus...	7.0
		12.3	16.4	...days between contact versus...	14.1
APAC (n=796)		24%	23%	... reach versus...	23%
		6.5	6.6	... impact versus...	7.0
		11.8	12.2	...days between contact versus...	17.2
LATAM (n=482)		29%	45%	... reach versus...	35%
		7.2	7.4	... impact versus...	7.5
		13.0	15.2	...days between contact versus...	18.7

Source: Navigator365™ Core, all specialists, 2022

OMNICHANNEL MSL

MSLs provide a critical service to HCPs and thought leaders, in terms of data dissemination and advanced education.

		Remote MSL	MSL email		MSL
US (n=2208)		19%	32%	... reach versus...	40%
		6.9	5.9	... impact versus...	6.9
		9.1	8.4	...days between contact versus...	15.3
EU5 (n=4718)		24%	32%	... reach versus...	39%
		7.0	6.1	... impact versus...	7.0
		11.2	8.6	...days between contact versus...	14.1
APAC (n=796)		20%	20%	... reach versus...	23%
		6.5	6.3	... impact versus...	7.0
		17.5	15.2	...days between contact versus...	17.2
LATAM (n=482)		19%	33%	... reach versus...	35%
		7.2	6.4	... impact versus...	7.5
		10.1	9.6	...days between contact versus...	18.7

Source: Navigator365™ Core, all specialists, 2022

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

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, remote detailing has not gained further traction post-pandemic, as the relatively low reach numbers indicate (the only exception – again – being APAC). Conversely, rep email has a higher reach (and similar frequency) vs rep visits across all regions, while impact is lower. Finally, the combination of rep email and the age-old self-detailing channel can be a great alternative to remote or F2F, but is strongly underleveraged, except in the US.

		Remote detailing	Rep email	Self-detailing	REP
US (n=2208)	... reach versus...	19%	37%	23%	46%
	... impact versus...	6.3	5.2	6.6	6.2
	...days between contact versus...	7.8	5.9	8.1	5.5
EU5 (n=4718)	... reach versus...	22%	46%	15%	49%
	... impact versus...	6.5	5.4	6.6	6.5
	...days between contact versus...	9.8	6.3	8.4	5.4
APAC (n=796)	... reach versus...	29%	34%	19%	32%
	... impact versus...	6.4	5.4	6.3	6.3
	...days between contact versus...	14.4	8.2	5.6	9.3
LATAM (n=482)	... reach versus...	18%	42%	12%	59%
	... impact versus...	6.5	5.6	6.4	6.3
	...days between contact versus...	9.3	6.3	9.5	7.5

Source: Navigator365™ Core, all specialists, 2022

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, under 20% of HCPs are exposed to pharma-owned mobile apps, the only exception being APAC, which is renowned as a 'mobile first' region. Importantly, for these relatively small engaged HCP audiences, the impact of this channel is remarkably similar across all four markets – and higher than the rep.

		Smartphone app	Rep
US (n=2208)	... reach versus...	14%	46%
	... impact versus...	6.7	6.2
	...days between contact versus...	3.6	5.5
EU5 (n=4718)	... reach versus...	14%	49%
	... impact versus...	6.8	6.5
	...days between contact versus...	3.9	5.4
APAC (n=796)	... reach versus...	24%	32%
	... impact versus...	6.8	6.3
	...days between contact versus...	6.6	9.3
LATAM (n=482)	... reach versus...	17%	59%
	... impact versus...	6.7	6.3
	...days between contact versus...	4.6	7.5

Source: Navigator365™ Core, all specialists, 2022

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

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 – it also leverages 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.

		eNewsletter		Rep
US (n=2208)		27%	... reach versus...	46%
		5.4	... impact versus...	6.2
		6.2	...days between contact versus...	5.5
EU5 (n=4718)		39%	... reach versus...	49%
		5.3	... impact versus...	6.5
		5.0	...days between contact versus...	5.4
APAC (n=796)		34%	... reach versus...	32%
		5.2	... impact versus...	6.3
		5.9	...days between contact versus...	9.3
LATAM (n=482)		37%	... reach versus...	59%
		5.8	... impact versus...	6.3
		5.9	...days between contact versus...	7.5

Source: Navigator365™ Core, all specialists, 2022

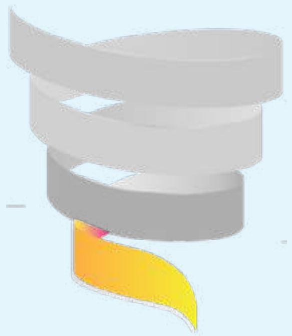
WEBSITE ENGAGEMENT

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 the four regions. A truly self-service platform where medical, commercial, customer service and access come together remains rare in biopharma, but is clearly the future.

		Website		Rep
US (n=2208)		35%	... reach versus...	46%
		5.8	... impact versus...	6.2
		7.2	...days between contact versus...	5.5
EU5 (n=4718)		30%	... reach versus...	49%
		6.1	... impact versus...	6.5
		7.7	...days between contact versus...	5.4
APAC (n=796)		37%	... reach versus...	32%
		6.1	... impact versus...	6.3
		6.9	...days between contact versus...	9.3
LATAM (n=482)		34%	... reach versus...	59%
		6.3	... impact versus...	6.3
		7.5	...days between contact versus...	7.5

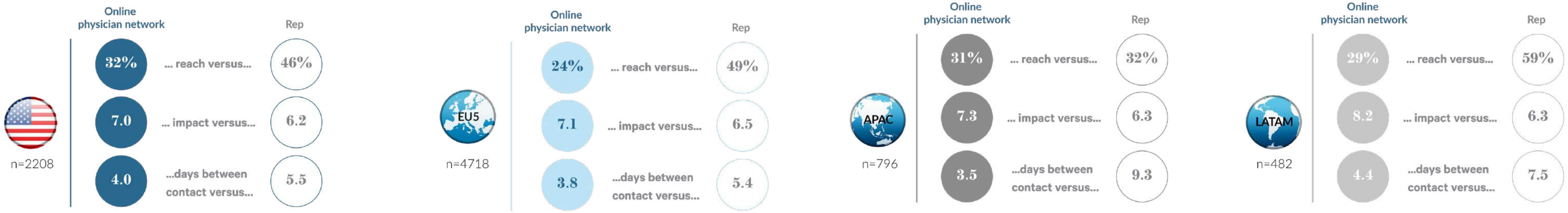
Source: Navigator365™ Core, all specialists, 2022

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.



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 four markets, but particularly so in LATAM, where this channel carries a lot of influence when it comes to HCPs' clinical decision making. APAC is the only region where reach is on a par with the rep (albeit because rep reach was notably lower than in the other three markets – perhaps due to evolving Covid situation in China, as mentioned earlier).



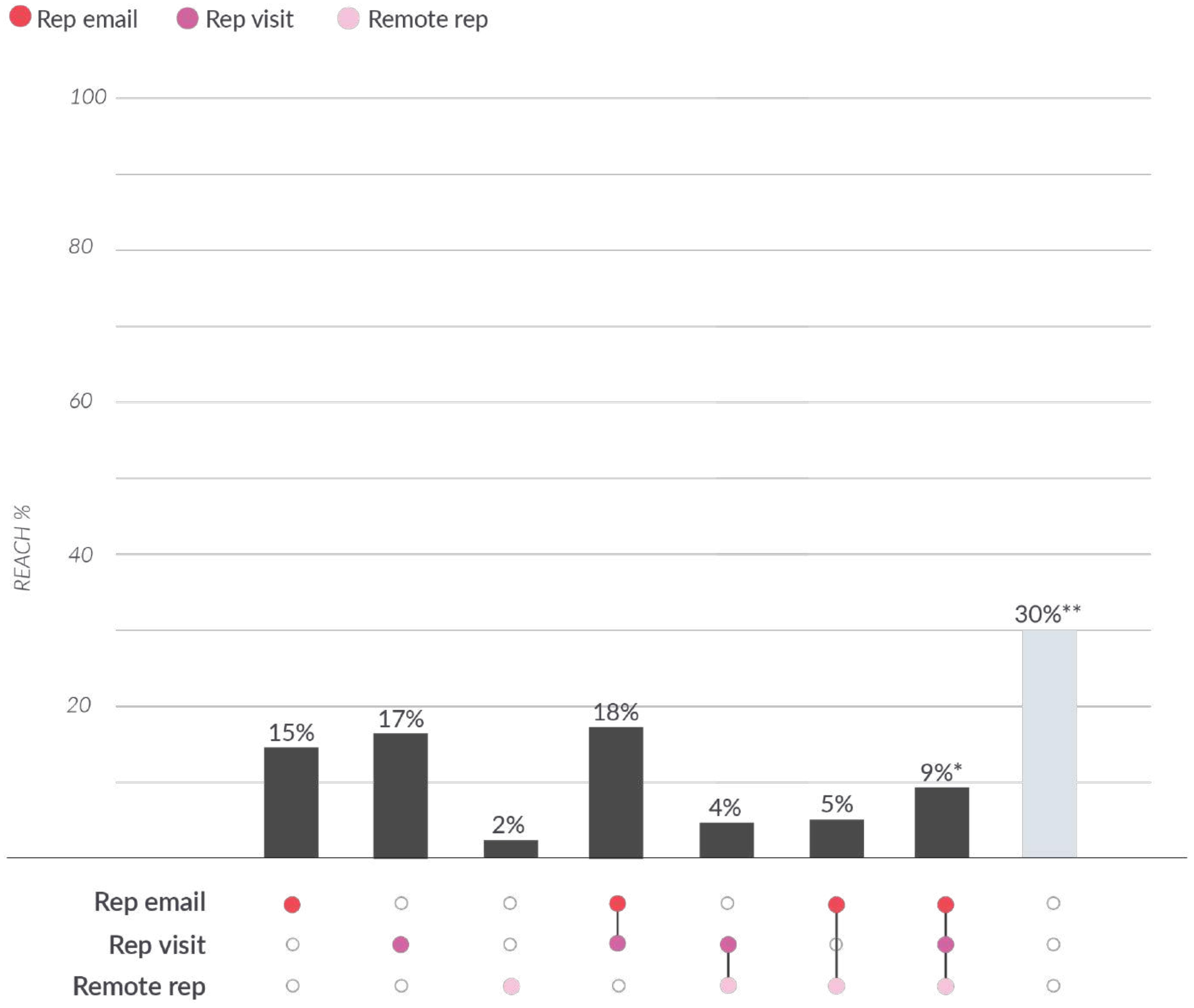
Source: Navigator365™ Core, all specialists, 2022

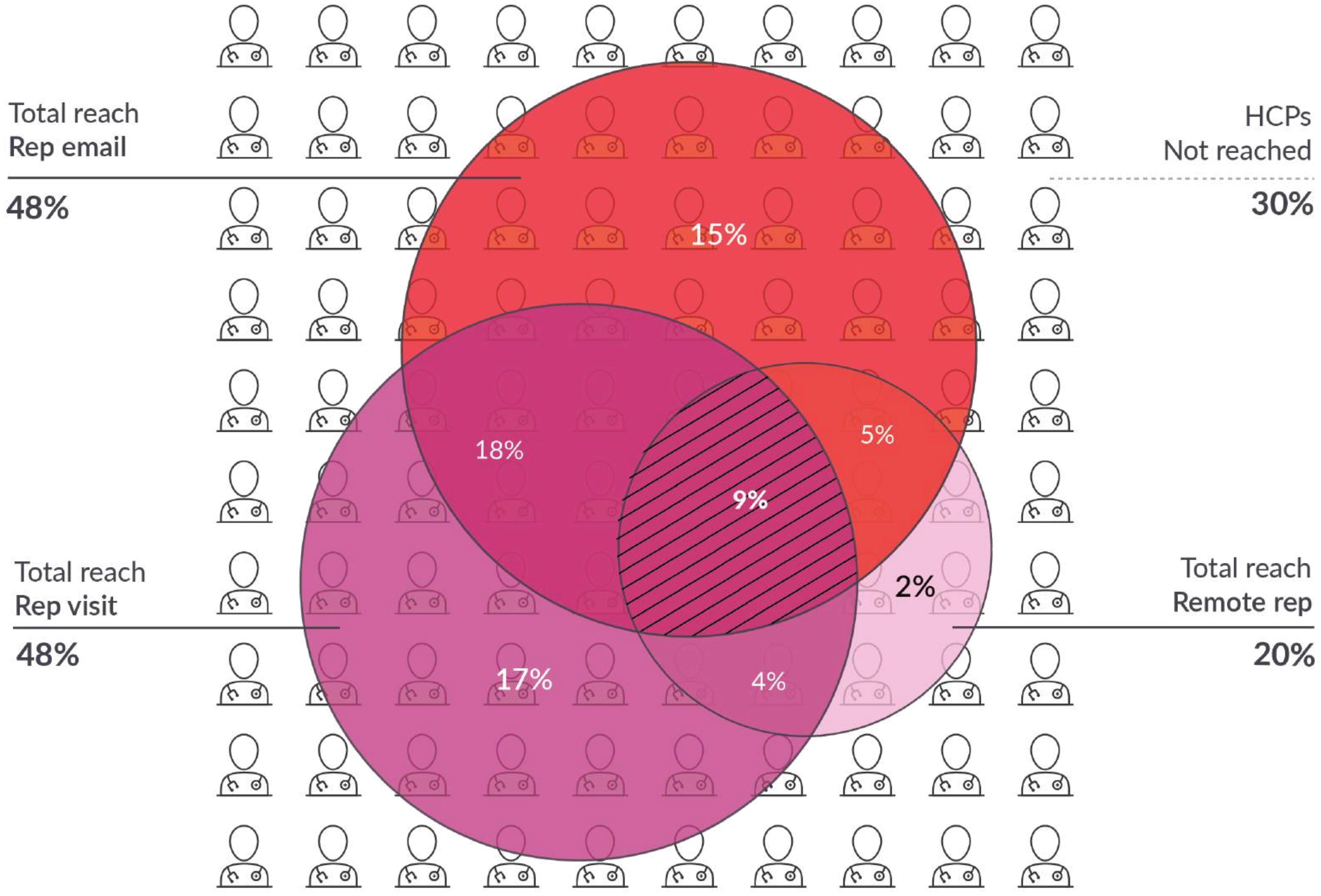
HIGHLIGHT

THE OMNICHANNEL REP: STILL EARLY DAYS (1/2)

Despite biopharma's strong focus on the omnichannel rep, only 9% of cardiologists in EU5 encounter this much-touted experience (visit + email + remote). Indeed, 17% only receive rep visits, while almost a quarter report they engage only through non-F2F channels. Also, almost a third are not reached by any of these three biopharma rep channels.

OC REP REACH - CARDIOLOGISTS, EU5, 2022





*9% of the HCPs interviewed are reached in a truly omnichannel fashion (a mix of F2F, rep email and remote rep interactions)

**30% of the HCPs interviewed are not reached by any rep channel

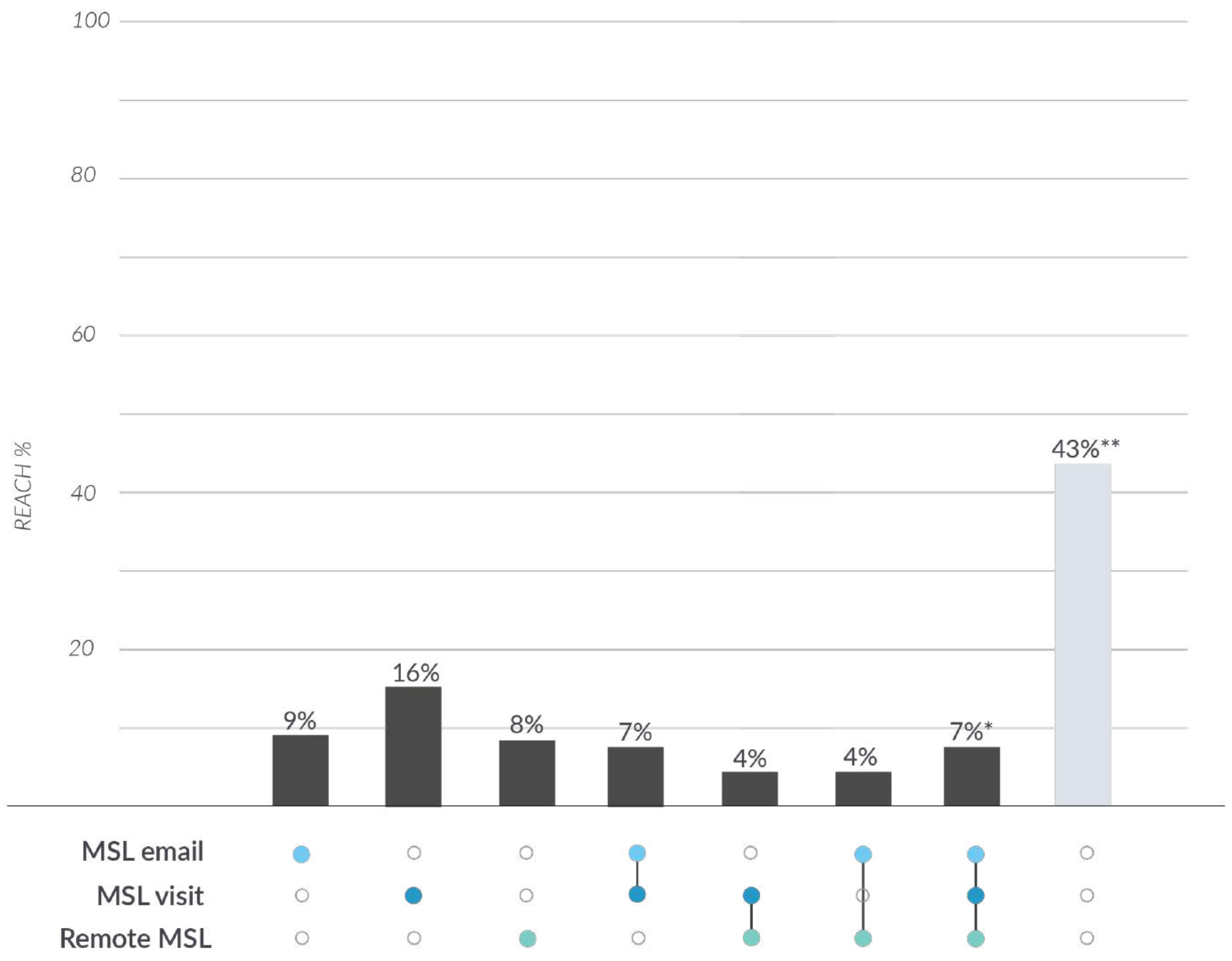
Source: Navigator365™ Core, EU5 cardiologists, 2022 (n=506)

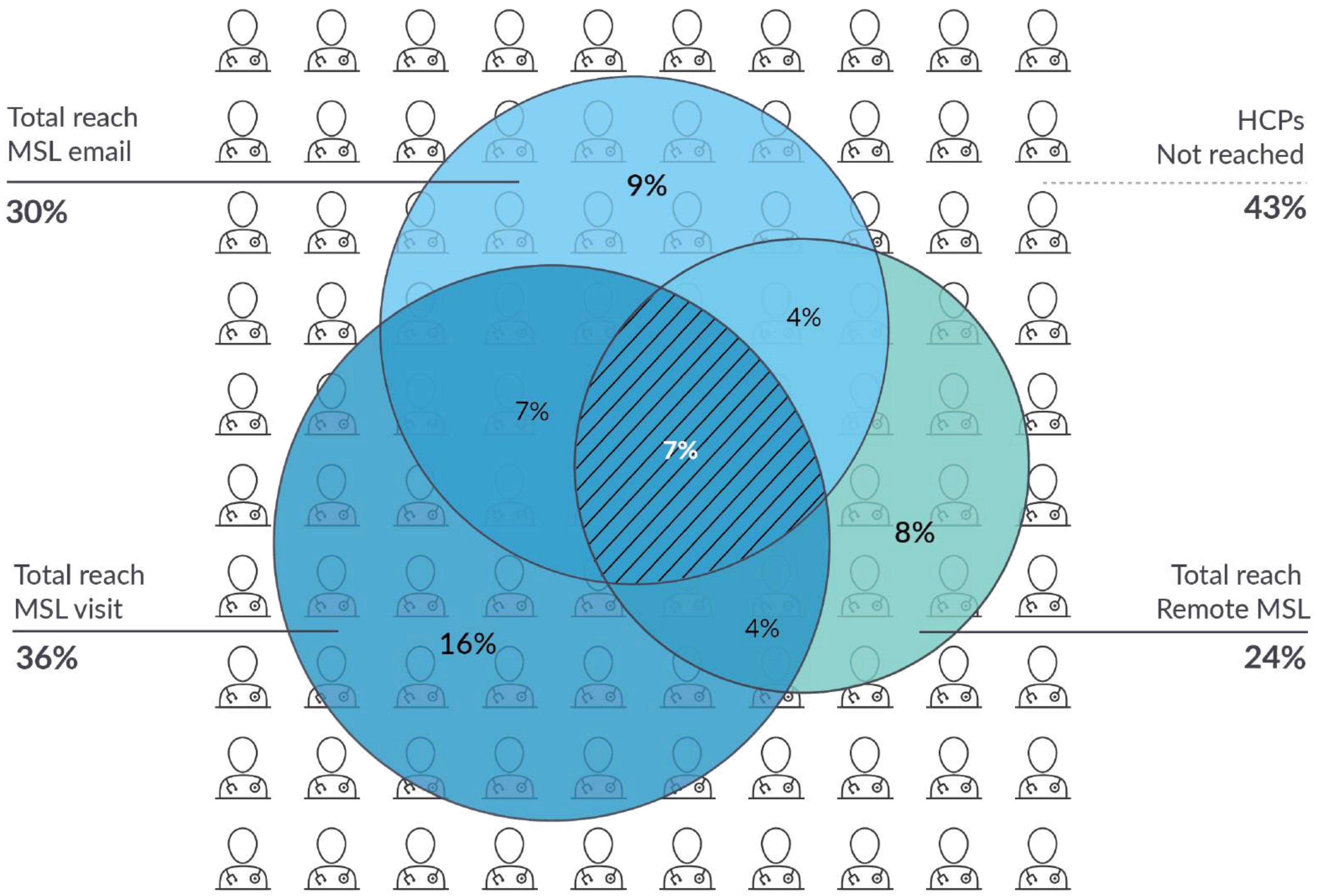
HIGHLIGHT

THE OMNICHANNEL MSL: STILL EARLY DAYS (2/2)

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, 16% only receive MSL visits, while just over a fifth engage only through non-F2F channels. Remote MSL is used more frequently vs remote rep, while MSL email appears to be underleveraged. Finally, as many as 43% do not engage with any of the three MSL channels at all.

OC MSL REACH - CARDIOLOGISTS, EU5, 2022





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

**43% of the HCPs interviewed are not reached by any MSL channel

Source: Navigator365™ Core, EU5 cardiologists, 2022 (n=506)

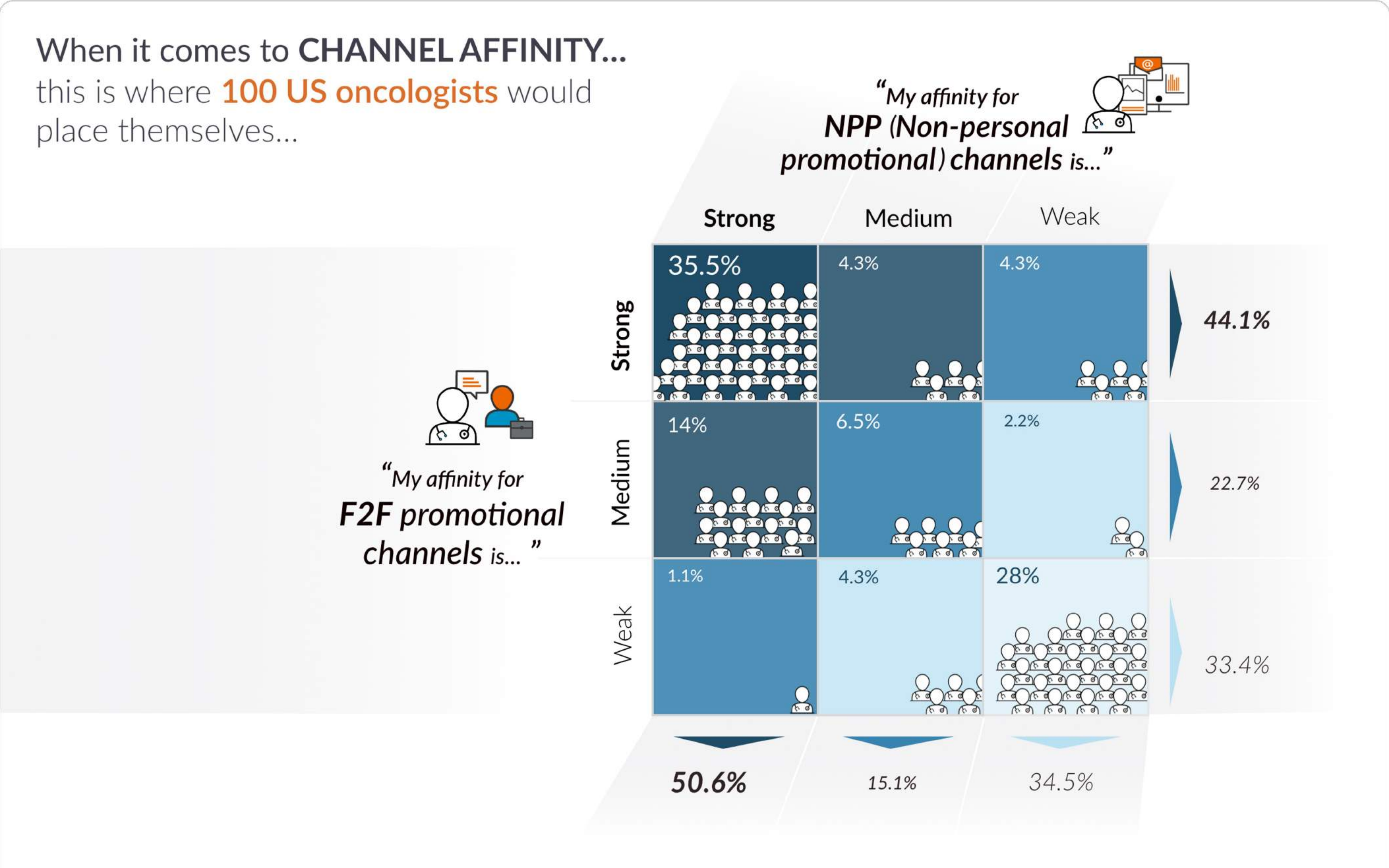
HIGHLIGHT

THE PROBLEM WITH TAKING 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 more than half of this audience with strong commercial NPP (50.6%), regardless of their level of affinity for F2F. This segment is bigger than the segment with a strong F2F preference (44.1%).

These insights suggest that rooting your go-to-market approach in traditional "either/or" thinking (either big focus on F2F for top segments and "NPP-only" for lower-tier segments) is clearly 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, the second biggest segment is the group that expresses a weak affinity for both F2F and NPP channels (28%). If this is a key segment for your brand, other channels and/or content may have to be used.



Source: Navigator™ Core, US oncologists, 2022 (n=200)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

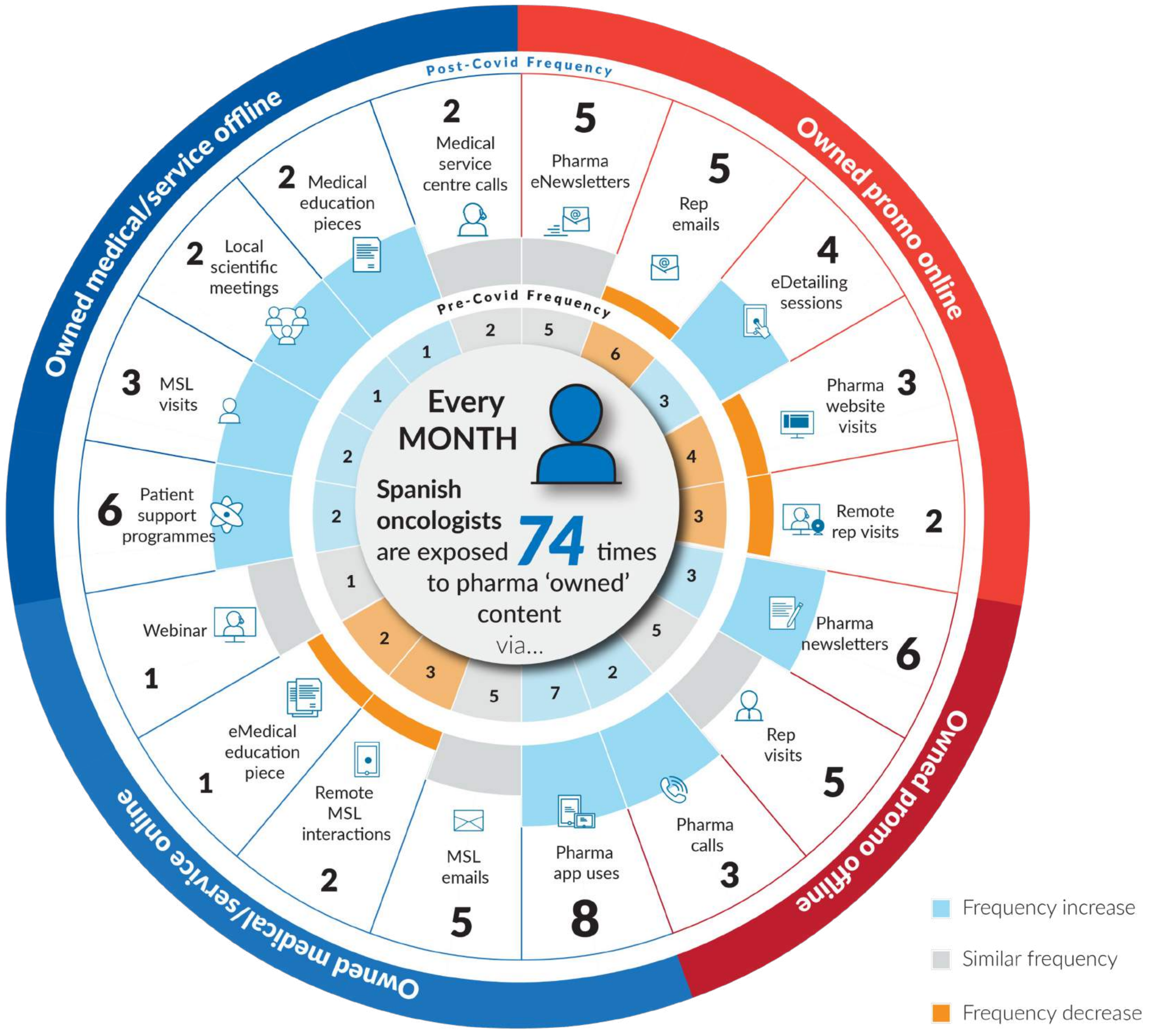
HIGHLIGHT

A MONTH IN THE (OMNICHANNEL) LIFE OF A SPANISH ONCOLOGIST

Each month, Spanish oncologists have over 70 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 2022 data with the corresponding numbers from 2019 – just prior to the pandemic – we see that of these 18 biopharma-owned channels, most (6/8) offline channels increased in frequency vs 2019, compared with only two out of ten for the online channels. Could this suggest we are getting back to the old normal? Is it another illustration of "skin hunger"? A stronger medical orientation of HCPs/pharma? Or is it biopharma that wants to go back to the old normal and needs more time to launch its omnichannel experiences at scale?

At any rate, it's clear that evidence-based customer-centric mix planning is a dynamic discipline – and the past is in no way a predictor of future success.



Source: Navigator365™ Core, Spanish oncologists, 2019 (n=100) and 2022 (n=101)

4. LAUNCH
trends

POWERED BY Navigator365™ Core AND Maturometer™

PREFERRED TIME FOR FIRST ENGAGEMENT WITH PHARMA CONTENT ABOUT A NEW PRODUCT

Around a third of specialists want to start learning about a new product before launch – though there is some variety between regions, with the highest level of pre-launch interest seen in LATAM (51%) and the lowest in APAC (25%).

This offers a great opportunity for omnichannel data dissemination and disease education prior to launch, advancing potential future prescribers on the knowledge ladder well before commercial can enter the picture. Such learnings can then power dynamic targeting efforts (next-best customer, next-best channel, next-best message, etc) for the commercial teams from day 1 post-approval.

LAUNCH
trends

PREFERRED TIMING - ALL SPECIALISTS, 2022

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=2018)	10%	21%	28%	15%	12%	13%
EU5 (n=4617)	12%	22%	29%	9%	12%	10%
APAC (n=564)	7%	18%	31%	19%	13%	12%
LATAM (n=306)	16%	35%	25%	14%	7%	3%
Global* (n=7595)	11%	24%	28%	14%	11%	10%

*Global: US, EU5, APAC and LATAM averaged (mean)

Source: Navigator365™ Core, all specialists, 2022

PREFERRED ENGAGEMENT APPROACH WITH REP IN A LAUNCH SETTING

Unsurprisingly, specialists across the globe continue to have a strong interest in F2F engagement in the setting of a new product launch; however in all regions, digital is an important ingredient (digital-only and mix). By adding digital to the launch mix, customer experience and the rather low satisfaction (*see HCP engagement KPIs earlier*) should improve – in addition, adding digital may halve the time to conversion… and boost performance in the often critical first 6 months of launch.

PREFERRED REP FORMAT - ALL SPECIALISTS, 2022

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=2018)	45%	48%	7%
EU5 (n=4617)	47%	51%	3%
APAC (n=564)	36%	53%	10%
LATAM (n=306)	47%	52%	1%
Global* (n=7595)	44%	51%	5%

Global: US, EU5, APAC and LATAM averaged (mean)

Source: Navigator365™ Core, all specialists, 2022

HCP SATISFACTION WITH BIOPHARMA DIGITAL AT LAUNCH

HCP satisfaction with biopharma's digital offering at launch is lower than the overall satisfaction score for biopharma digital (see HCP engagement KPIs earlier) – and these low scores are similar across all four regions. This creates another interesting opportunity for the industry – augment your F2F engagements around launch with a robust mix of medical and commercial digital activities – in a customer-centric way.

SATISFACTION WITH DIGITAL - ALL SPECIALISTS, 2022

Q: On a scale of 0 to 5, how satisfied were you with digital communication during recent product launches?	Dissatisfied (score 0-2)	Neutral (score 3)	Satisfied (Score 4 or 5)
US* (n=2018)	27%	34%	38%
EU5 (n=4617)	28%	38%	34%
APAC (n=564)	24%	41%	35%
LATAM (n=306)	24%	35%	41%
Global† (n=7595)	26%	37%	37%

**Total does not equal 100% due to rounding*

†Global: US, EU5, APAC and LATAM averaged (mean)

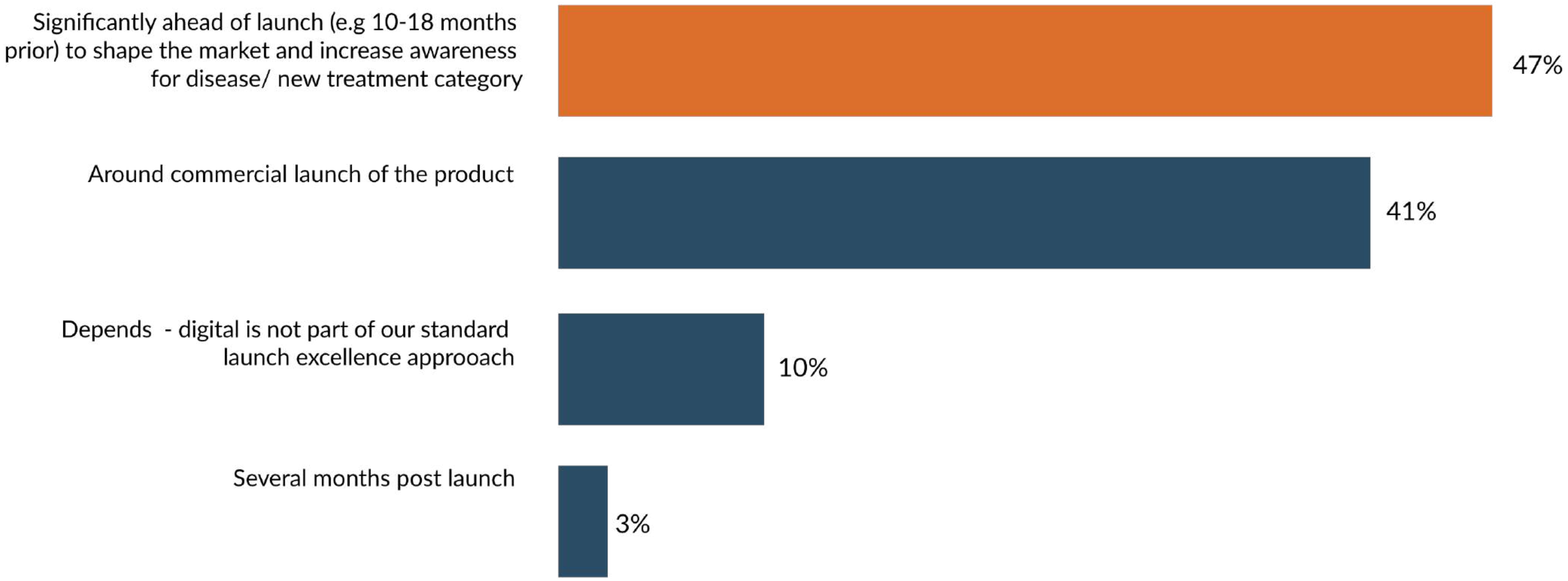
Source: Navigator365™ Core, all specialists, 2022

HIGHLIGHT

FEWER THAN HALF 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), data from the 2022 Maturometer™ show that only 47% of European biopharma colleagues 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™ 2022, EU Biopharma (n=127)

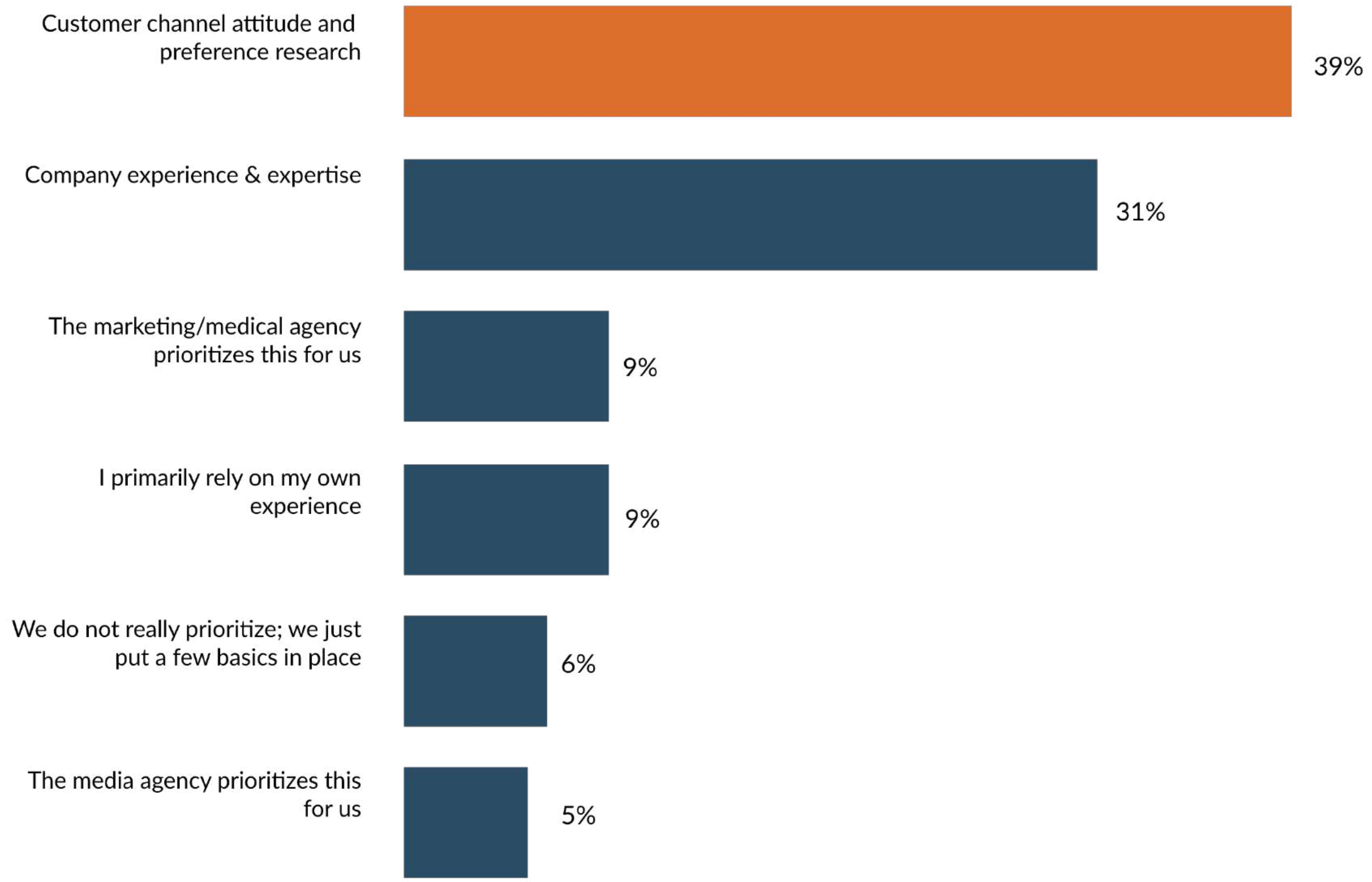
HIGHLIGHT

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 perilaunch phase. Maturometer™ data further reveal that, despite the clear need to understand the (new) customer engagement landscape, only 39% actually undertake this effort.

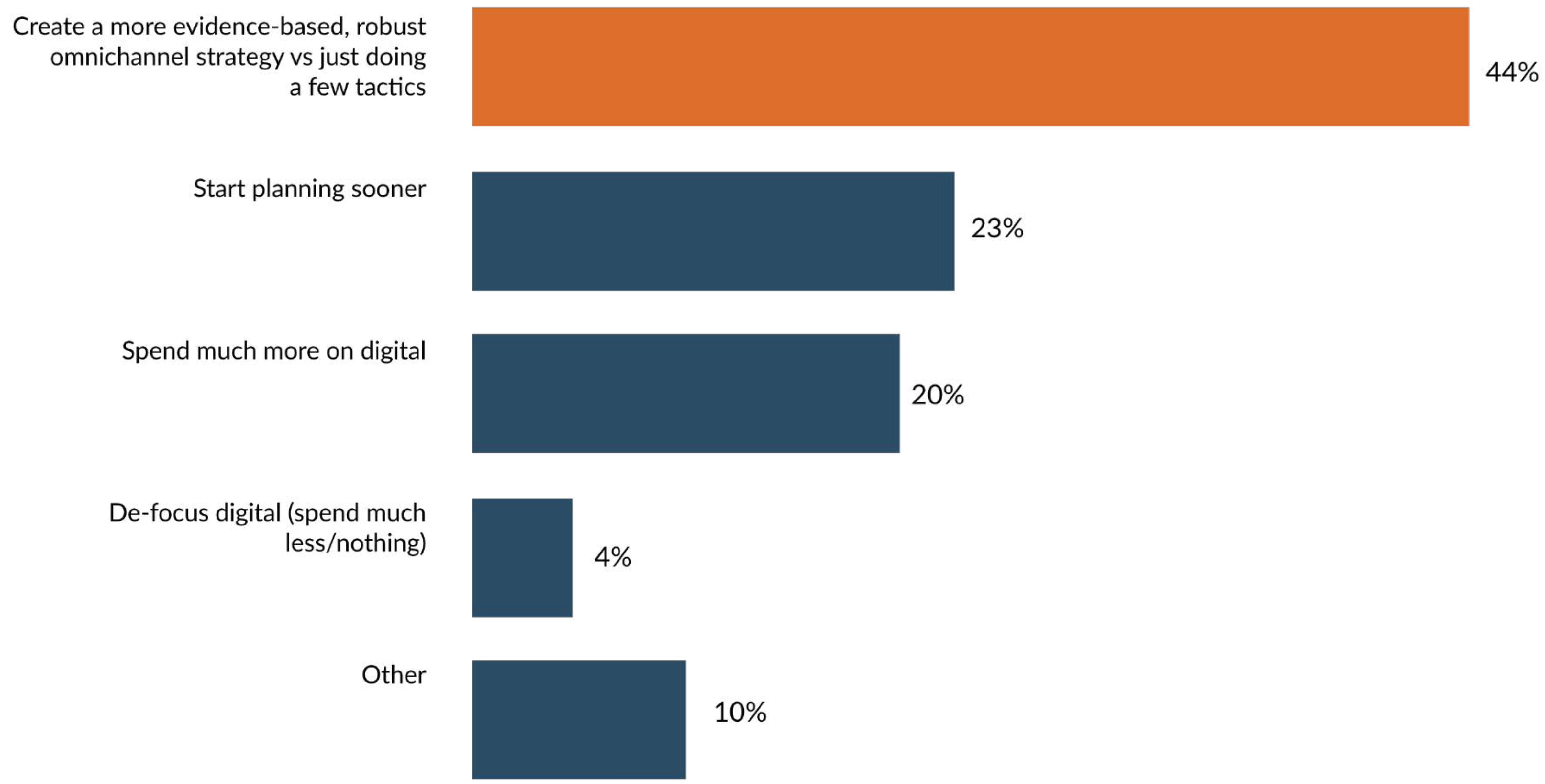
What is reassuring is that 44% plan to utilize customer channel affinity research to inform their future planning, while the second and third focus areas "start planning sooner" and "spend more on digital" should come as no surprise in view of the earlier Navigator365™ Core launch insights.

Q: How do you prioritize digital channels for a product launch?



Source: Maturometer™ 2022, EU Biopharma (n=127)

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



Source: Maturometer™ 2022, EU Biopharma (n=127)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

5. BENCHMARK
analysis

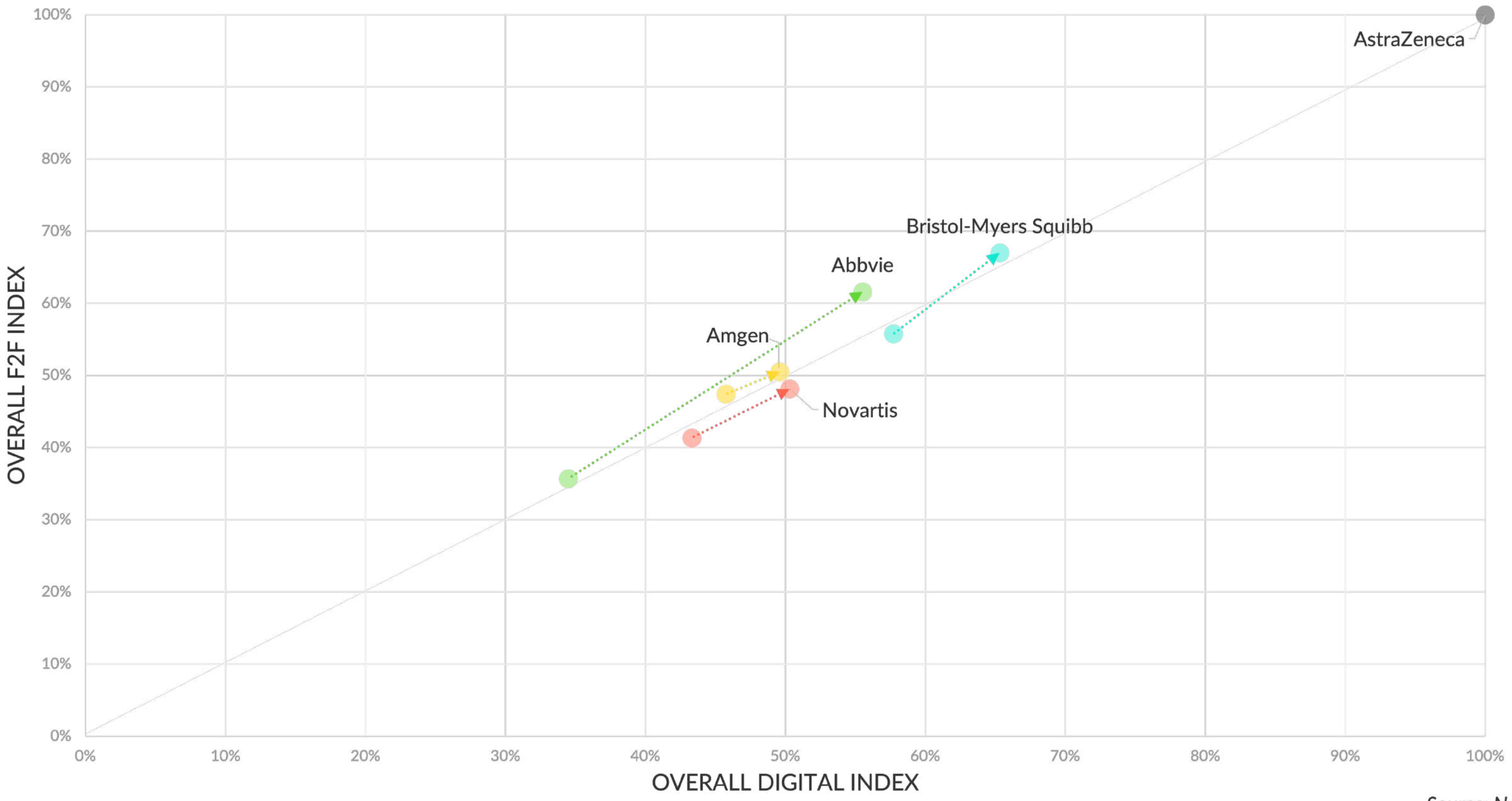
POWERED BY Navigator365™ **Core** AND Navigator365™ **Cx Benchmark**

EVOLUTION OF F2F AND DIGITAL EXCELLENCE IN ONCOLOGY

Taking oncologists as an example (other therapy areas are available in Navigator365™ Core), let's look at how the top 5 companies were ranked according to their performance across all F2F and all digital channels – and how these positions change from 2021 to 2022. AstraZeneca held on to the top spot in both dimensions for another year, while BMS, Abbvie, Novartis and Amgen all made improvements (some quite significant) in terms of both digital and F2F excellence.

BENCHMARK
analysis

EVOLUTION OF F2F AND DIGITAL EXCELLENCE – ONCOLOGISTS, GLOBAL, 2021–2022



F2F channels: rep, rep tablet, MSL, MSL tablet, offline scientific meetings; *digital channels:* remote rep, remote MSL, rep email, MSL email, pharma email, pharma website, webcasts, eMedical education, online conferences

Index *= company's score divided by the leading score, therefore the leading company has an index of 100%*

Source: Navigator365™ Core, oncologists, 2021 (n=1560), 2022 (n=907)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

WHAT DRIVES AN OPTIMAL CX?

When it comes to Cx drivers related to biopharma engagement, specialists of all stripes rate 'fast response/ feedback' as the most important dimension across all regions, followed by 'knowledgeable staff'. 'Knows my professional interests' also scores well, indicating that personalization has a role to play, while of the omnichannel criteria, 'knows and respects my channel preference' is regarded as important, particularly among European and APAC specialists. Although 'getting information through any channel' and 'easy to engage with' have a lower importance, improving these would clearly contribute to a world-class customer experience.

	GLOBAL	US	EU5	APAC	LATAM
Driver	n=2096	n=659	n=1154	n=182	n=101
Fast response/feedback	1st	1st	1st	1st	1st
Knowledgeable staff	2nd	3rd	2nd	2nd	3rd
Knows my professional interests	3rd	2nd	3rd	6th	2nd
Knows & respects my channel preference	4th	7th	4th	4th	5th
Respects my time	5th	4th	5th	5th	4th
I can get information & service through any channel	6th	6th	6th	3rd	7th
Easy to contact/engage with	7th	5th	7th	7th	6th

Source: Navigator365™ Cx Benchmark, all specialists, 2022

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

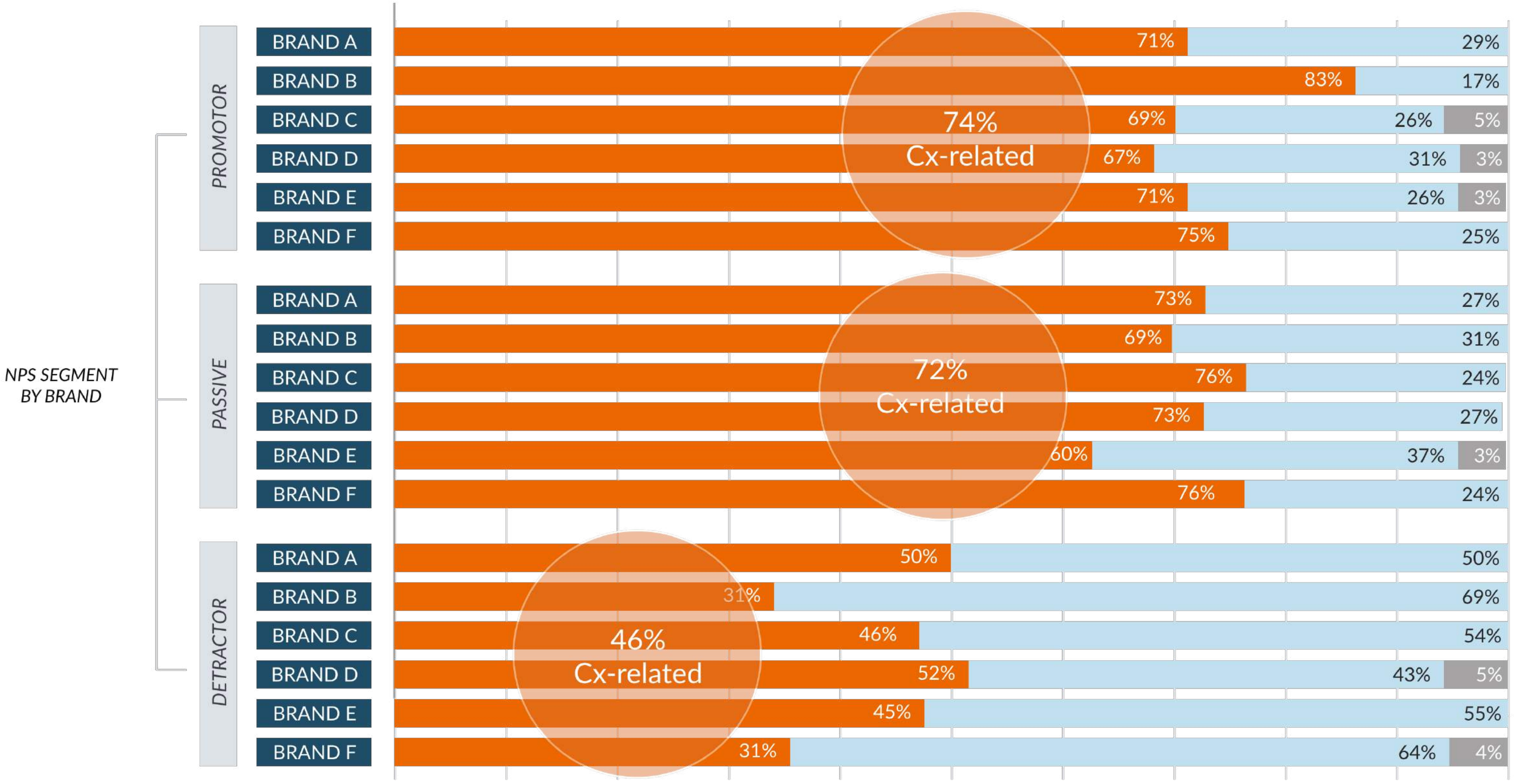
HIGHLIGHT

PROMOTER NPS SCORES DRIVEN BY CX RATHER THAN BRAND ATTRIBUTES
NAVIGATOR365™ CX BENCHMARK (US, ASTHMA BRANDS)

Passives (NPS 7–8) and promoters (NPS 9–10) attribute over 70% of their NPS scores to Cx-related factors (defined as: high-quality omnichannel engagements), and since promoters tend to prescribe significantly more than passives, the difference between an "OK" and a "great" experience has the potential to have a large effect. On the other hand, detractors (NPS of 0–6) tend to link their low score to brand attributes (efficacy, tolerability, etc), which could imply that trying to convince them through a great Cx is not likely to improve their score – it makes sense that the (brand) basics need to be in place first. Of course it's not always this simple – the brand vs Cx divide in promoters may be affected by other factors. One example is product complexity; hardly surprising that in MS, we see a larger portion of promoter scores driven by brand attributes vs less complex product categories.

PROMOTOR NPS SCORE DRIVERS - ASTHMA BRANDS, US, 2022

Q: Is your score driven by Cx or by brand attributes (or a mix of both)?



Source: Navigator365™ Cx Benchmark, 2022

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

HIGHLIGHT

OVERALL LEADERSHIP IN OCE APPEARS TO BE DRIVEN BY THE COMMERCIAL DIMENSION NAVIGATOR365™ BENCHMARK (GERMANY, BREAST CANCER)

In this snapshot of German oncologists' views on breast cancer treatments, Enhertu ranks top in terms of overall leadership in omnichannel customer engagement (OCE) – which appears to be driven largely by the commercial dimension – though Verzenios and Ibrance are not far behind. Ibrance (currently ranked third in overall OCE leadership after Enhertu and Verzenios) might look at upping its medical offerings in order to improve its position. Patient leadership does not appear to affect the overall ranking (yet) with overall OCE leader Enhertu ranked fifth in this dimension, significantly lower than first-place Ibrance.

BRAND VIGNETTE - ONCOLOGISTS, GERMANY, 2022

Brands: Enhertu, Ibrance, Kisqali, Perjeta, Verzenios

RANKED:	1st	2nd	3rd	4th	5th
BRAND					
NPS	Enhertu	Kisqali, Verzenios (-3%)		(-5%)	(-10%)
Patient centricity	Enhertu	Kisqali (-25%)	(-35%)	(-44%)	(-46%)
Overall OCE leadership	Enhertu	Verzenios (-2%)	Ibrance (-4%)	(-9%)	(-9%)
OCE & CX					
Commercial OCE leadership	Enhertu	Ibrance (-12%)	Perjeta (-18%)	(-23%)	(-26%)
Medical OCE leadership	Verzenios	Enhertu (-5%)	Kisqali (-10%)	(-19%)	(-21%)
Patient OCE leadership	Ibrance	Kisqali (-15%)	Perjeta (-22%)	(-25%)	(-32%)

Source: Navigator365™ Cx Benchmark, German Oncologists, 2022 (n=50)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

6. PAYER highlights

POWERED BY Navigator365™ Payer

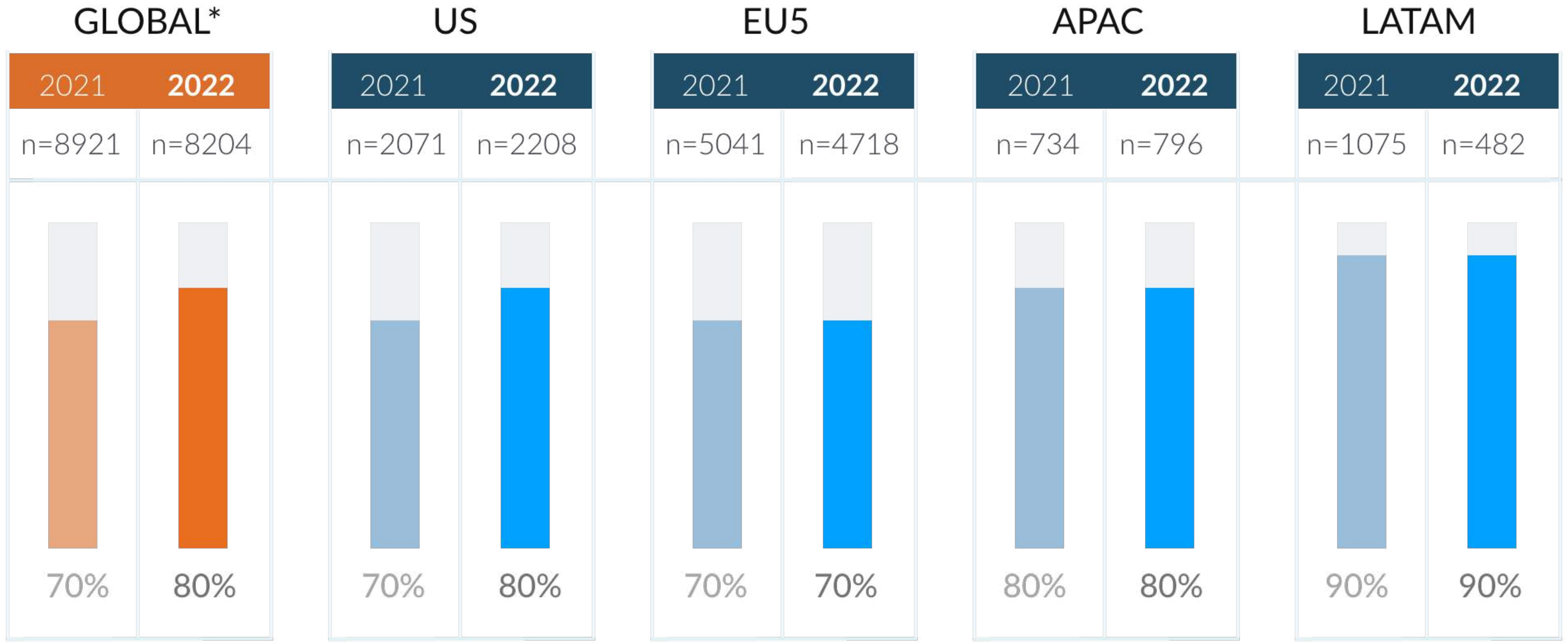
PAYER
highlights

PAYER POWER

Payers continue to exert a significant influence on specialists' clinical decision-making in all markets, but particularly in LATAM, where, for the second year running, 'Payer power' was 90% more impactful than the rep.

In this section, we explore a new resource – Navigator365™ Payer – which is based on the successful Navigator365™ Core and leverages similarly robust primary research to offer valuable insights into the Payer landscape. In 2022, this initial research was conducted primarily among payers in the US, and will be expanded into other markets in the future.

'Payer power'
(how much more impactful are treatment guidelines vs the rep)



*Global: US, EU4+UK, APAC and LATAM averaged (mean)

Source: Navigator365™ Core, all specialists, consolidated data

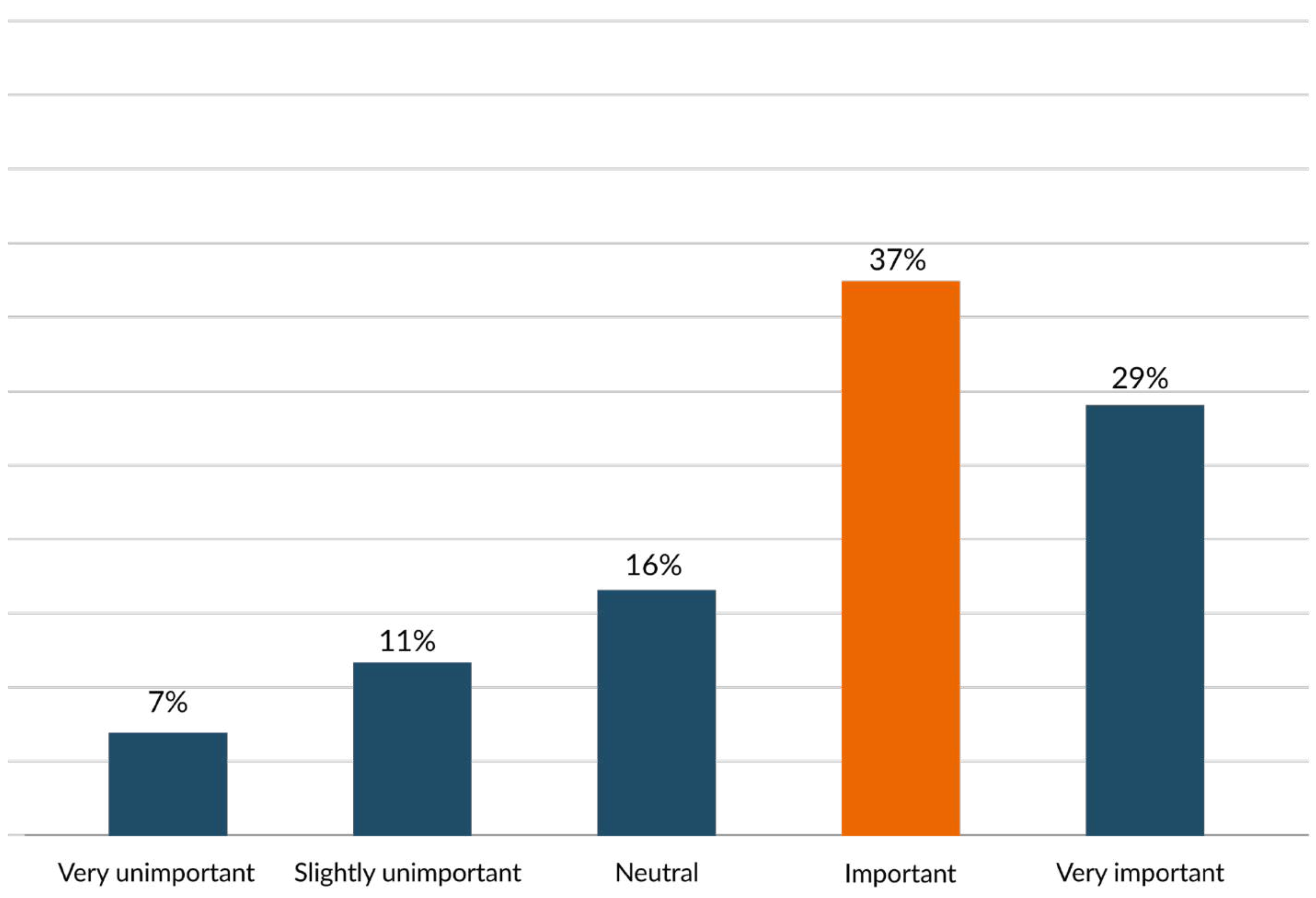
WHAT DO PAYERS THINK ABOUT BIOPHARMA'S DIGITAL OFFERINGS?

Just like with HCPs, payer engagement preferences have evolved quickly – digital dynamics have accelerated and biopharma needs to think radically differently about the 'rules of engagement' for this highly influential audience.

Two-thirds of US payers rate biopharma digital channels as (very) important (Navigator365™ Payer US) – almost a third of them giving a "very important" score. However, only 26% say that "most biopharma companies" are providing them with digital content that is relevant to them as payers.

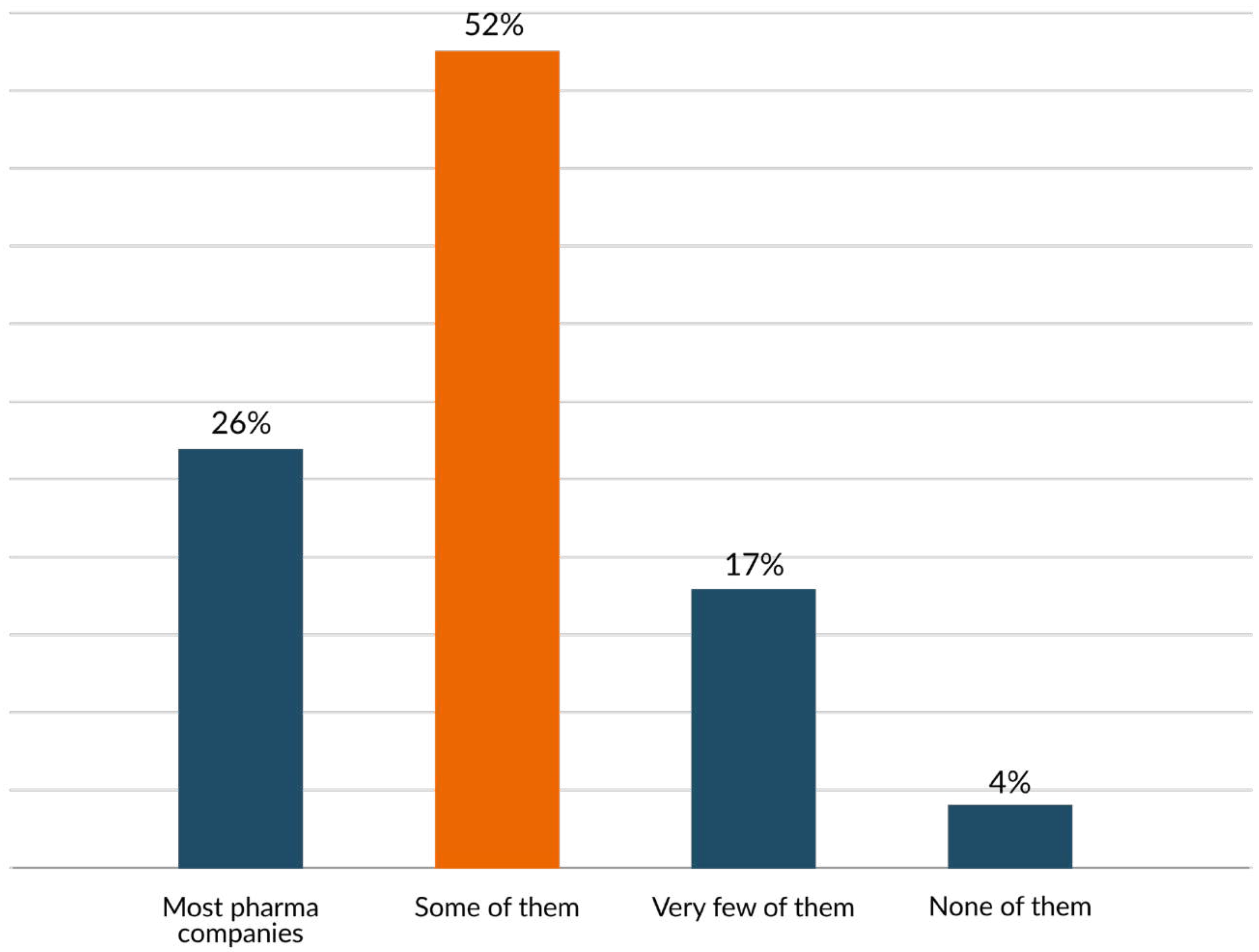
Interestingly, US payers attach a higher importance to digital channels than US prescribers (66% vs 53% find biopharma digital [very] important). The importance of an effective payer-centric omnichannel strategy therefore cannot be underestimated.

IMPORTANCE OF BIOPHARMA DIGITAL – PAYERS, US, 2022



Importance of pharma digital channels to respondents on a 0-10 scale
Score grouping: Very important = 9-10; important = 7-8; neutral = 5-6; slightly unimportant = 3-4; very unimportant = 0-2

RELEVANT DIGITAL CONTENT FROM BIOPHARMA – PAYERS, US, 2022



% among respondents

Source: Navigator365™ Payer, US payers, 2022 (n=167)

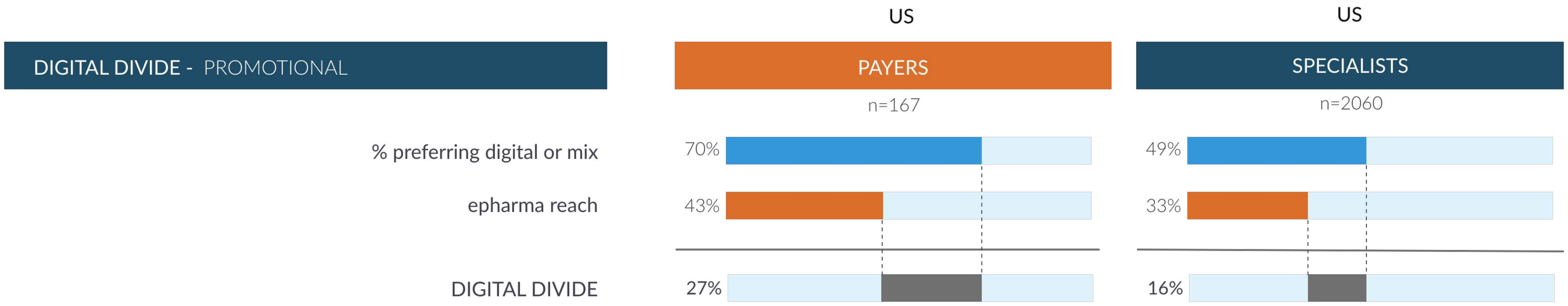
HIGHLIGHT

DIGITAL ENGAGEMENT FROM BIOPHARMA IS NOT YET MEETING THE NEEDS OF PAYERS

While 70% of payers prefer to engage with biopharma via digital-only or a mix of digital and F2F for commercial content, the reach of the top commercial digital channels is only 43%, creating a large opportunity to close this ‘digital divide’.

Interestingly, when we look at the communication preferences of US prescribers, only 49% want digital-only or a mix. With a markedly bigger digital divide for payers (26%) than for prescribers (16%), customer-centric innovative biopharma companies can quickly create a sustainable competitive edge.

DIGITAL DIVIDE PROMOTIONAL - PAYERS VS SPECIALISTS, US, 2022



*The digital divide is defined as the delta between the **% of respondents preferring digital or mix and the average % reach of the top 3 online promo channels (‘ePharma reach’)** for each of the two groups*

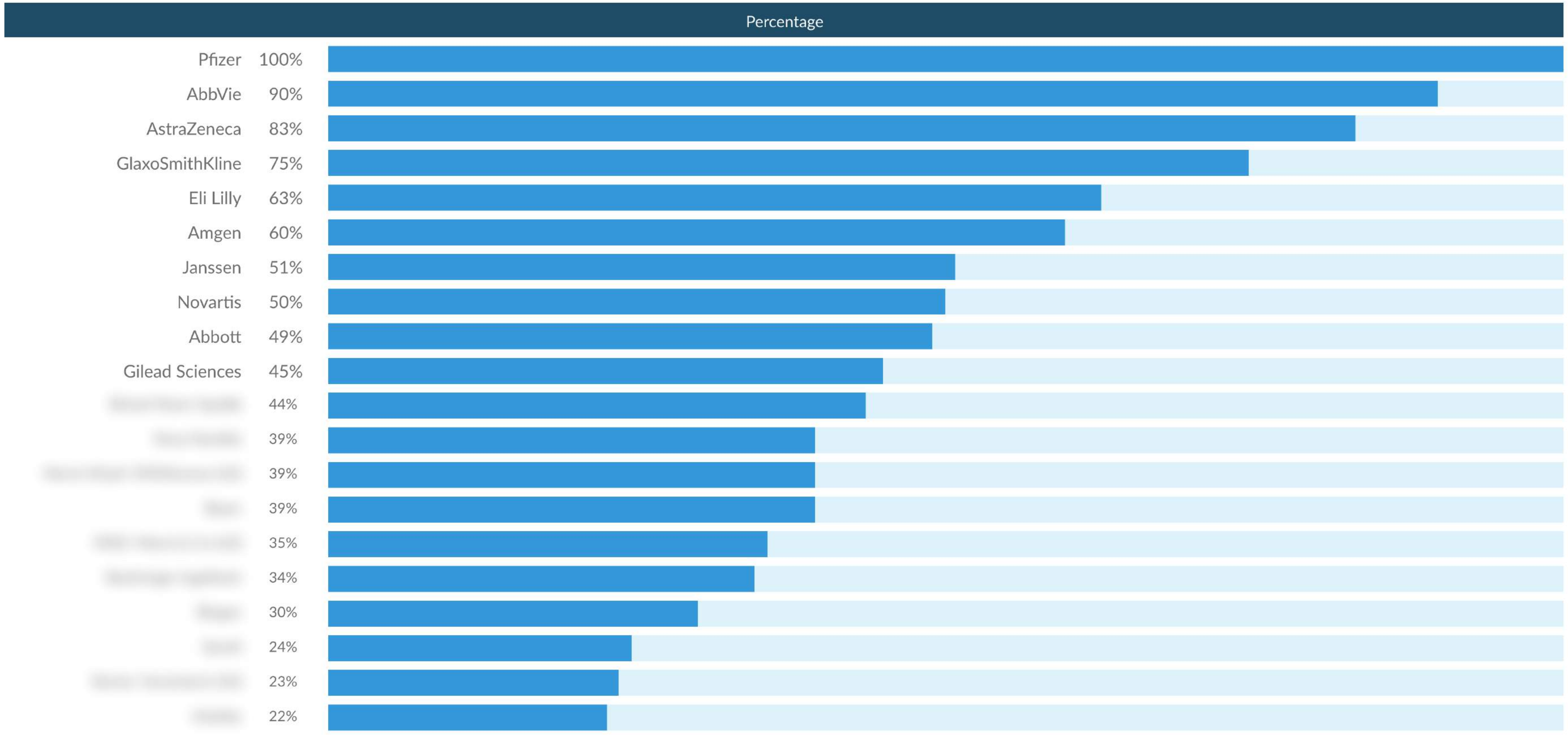
Source: Navigator365™, US Payers, 2022 (n=167), Navigator365™ Core, US Specialists, 2022 (n=2060)

HIGHLIGHT

WHICH BIOPHARMA COMPANIES ARE RANKED TOP BY US PAYERS?

So how well are companies executing on the omnichannel promise vs the competition? When it comes to overall engagement quality scores (for 20 online and offline channels), Pfizer, Abbvie and AstraZeneca constitute the top 3. Scores then start dropping quickly – the number 10 (Gilead) achieves only 45% of the leader score, and the company ranked 20th only 22%. This is yet another illustration of the clear business case for ramping up omnichannel efforts quickly.

OVERALL COMPANY SCORES – PAYERS, US, 2022



Companies are ranked according to their overall company score, which reflects their scores across 20 key channels and health technology

Source: Navigator365TM Payer, US Payers, 2022 (n=101)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

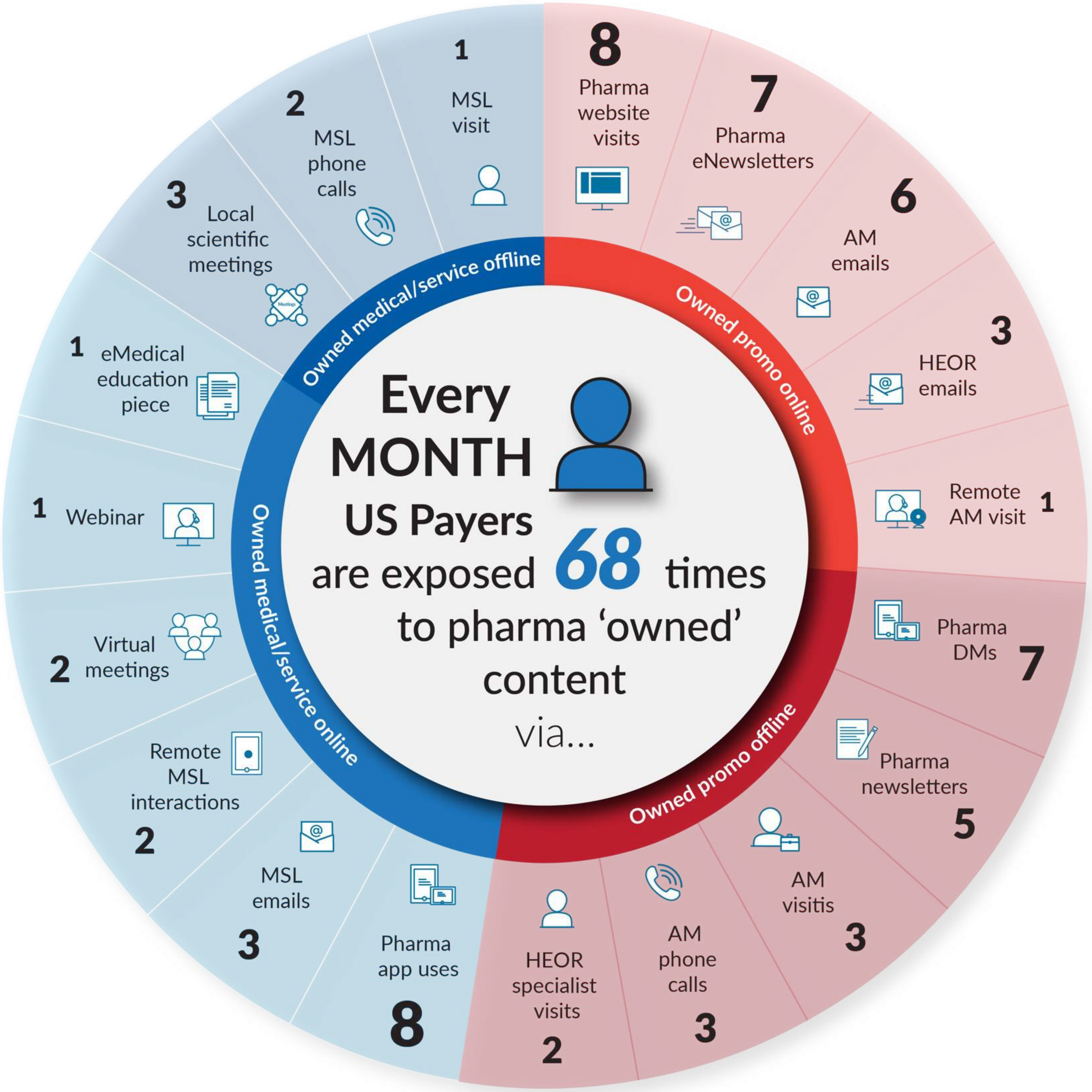
HIGHLIGHT

HOW OFTEN ARE US PAYERS EXPOSED TO PHARMA CHANNELS IN A TYPICAL MONTH?

Payers, too, are accessing key information through digital channels. Taking US payers as an example, the 2022 Navigator365™ data shown earlier tells us that 66% rate biopharma digital channels as important or very important. And when it comes to engaging with the industry in either a promotional or educational context, a large majority (70%) prefer digital-only or omnichannel (digital + F2F) engagement over a purely F2F approach.

Just how often are payers exposed to biopharma content and what channels are they interacting with? Navigator365™ Payer US shows that in a typical month, a payer may have around 70 interactions, both offline and online, with biopharma content, via almost 20 biopharma-owned channels. There will be additional exposure through paid (and possibly earned) channels.

Clearly, US payers live in an omnichannel world already, probably even more than prescribers, In view of payers' ever increasing importance across the globe, developing a robust omnichannel strategy for the different types of payers is a core component of any successful launch or growth brand.



Source: Navigator365™ Payer, US payers, 2022 (n=167)

NOTE: Results may vary significantly over time as well as between countries, therapeutic areas and customer segments.

How we
can help you

PRODUCTS

SERVICES

CONTACTS

About
ACROSS HEALTH

ACROSS HEALTH
a precision value & health team

Across Health brings **omnichannel products, services & frameworks** together in a unique end-to-end fashion

www.across.health

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

- Insight: Maturity assessment (Maturometer™)
- Innovation strategy: Digital transformation strategy; Omnichannel customer-centric strategy; Omnichannel Launch Excellence
- Intelligent execution: Omnichannel campaign execution
- Impact: Impact measurement; Dashboards; Predictive analytics

PRODUCTS

Navigator365™

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

Omnitopia™

ACROSS HEALTH
a precision value & health team

Navigator365™

The Navigator365™platform is the centerpiece of our omnichannel offerings. It provides you with the insights, evidence and tools you need 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

Since research began in 2013, the Across Health 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 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 omnichannel maturity measuring...

Maturometer™

An in-house Maturometer™ assessment allows you to measure and benchmark your company's omnichannel maturity – internally and against our historic database – as well as 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 aims to help participants to better understand the key concepts of evidence-driven omnichannel customer engagement. Omnitopia™ effectively simulates the experience of planning and executing a real omnichannel campaign in a truly competitive setting. Available in three different settings: Commercial, Medical and Field Commercial.

Navigator365™

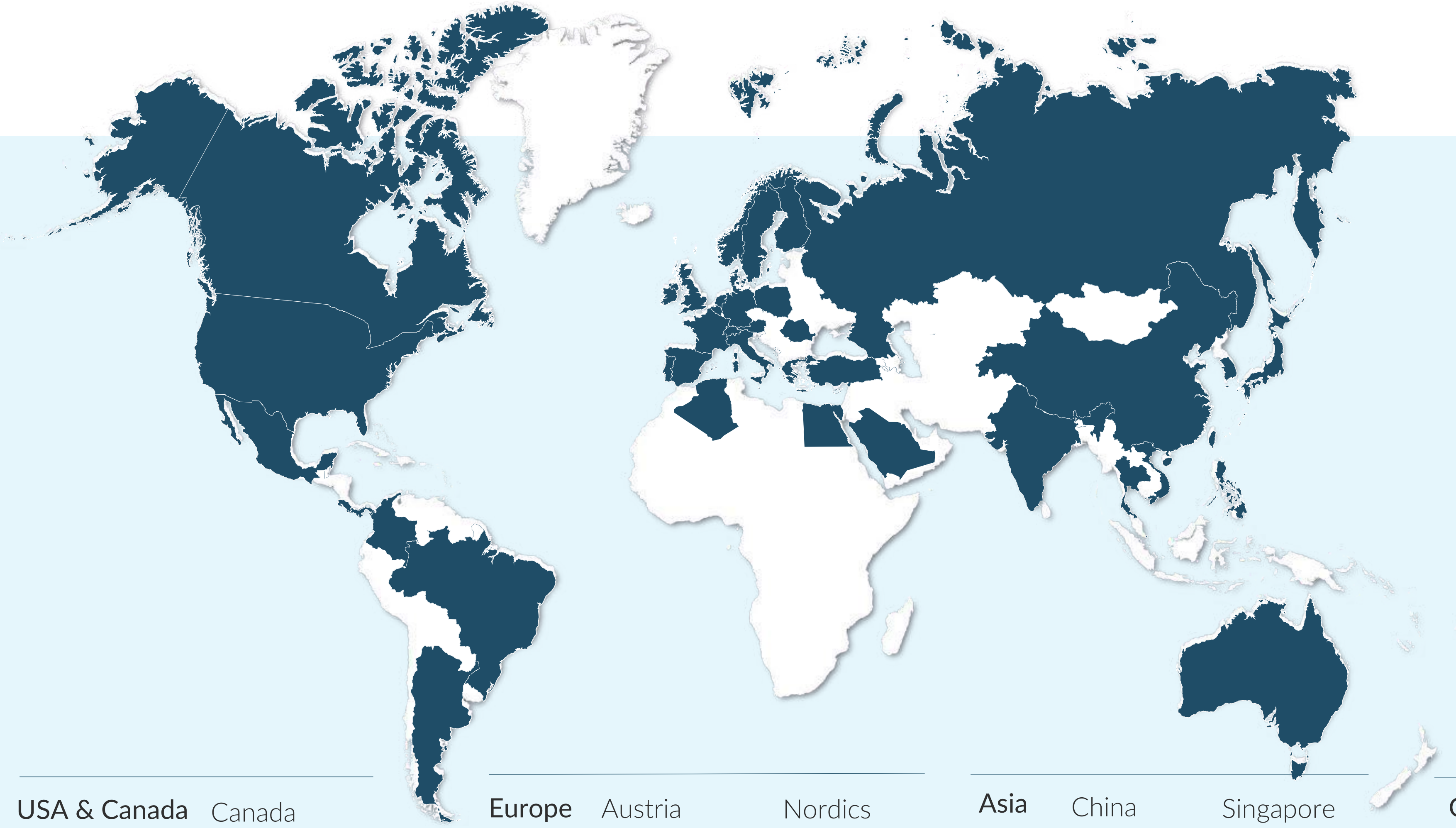
COVERAGE 2021-2022

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 & North Africa: Algeria, Egypt, Saudi Arabia

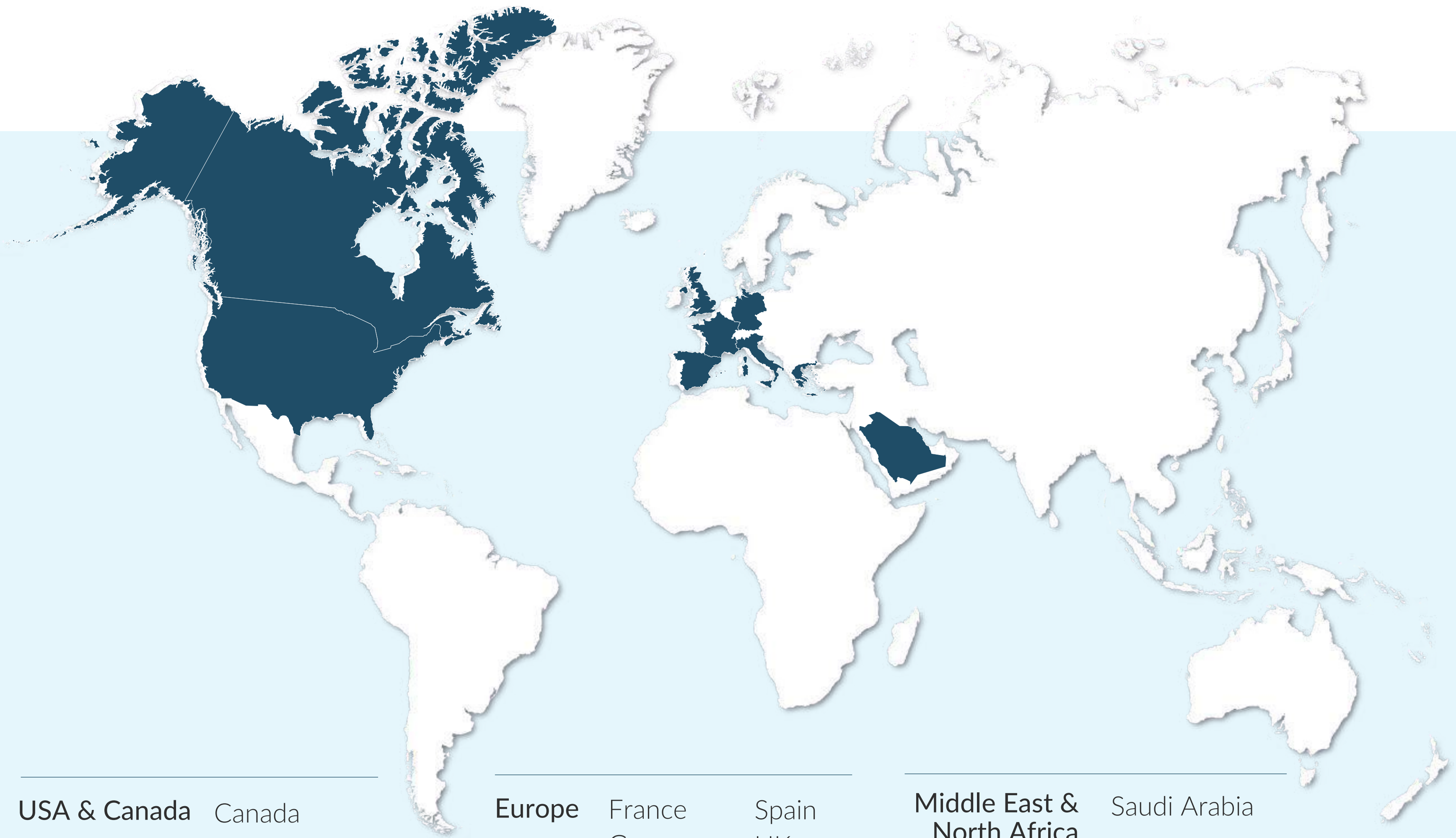
Oceania: Australia

Navigator365™ Cx Benchmark

INDICATIONS

- ACUTE LEUKEMIA
- ASTHMA
- BIRTH CONTROL & MENOPAUSAL HORMONE THERAPY
- BREAST CANCER
- CF
- CHOLESTEROL
- CHRONIC LEUKEMIA
- COPD
- HEART FAILURE
- LUNG CANCER
- LUPUS
- MS
- OVARIAN CANCER
- PROSTATE CANCER
- PSORIASIS
- RENAL
- RHEUMATOID ARTHRITIS
- SMA

GEOGRAPHIC MARKETS



USA & Canada: Canada, United States

Europe: France, Germany, Greece, Italy, Spain, UK

Middle East & North Africa: Saudi Arabia

*Next to the standard ('Tier 1' set) TAs listed here, other TAs are possible; please contact your account manager or customercare@a-cross.com for more information

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