

REPORT

# THE STATE OF OMNICHANNEL IN BIOPHARMA **2024**

INSIGHTS AND HIGHLIGHTS  
FROM OUR NAVIGATOR365™  
AND MATUROMETER™ RESEARCH



PRECISION AQ™



THE STATE OF  
OMNICHANNEL  
IN BIOPHARMA  
2024

Welcome to our latest annual trends report on the state of omnichannel customer engagement in biopharma – we hope you enjoy the new look!

In this report, we aim to share some of 2024's most interesting insights and trends pulled from our Navigator365™ and Maturometer™ research, to create a unique snapshot of what biopharma and its HCP and Payer audiences have been thinking and doing in the omnichannel space.

We look forward to hearing your thoughts!



Ruud Kooi

EVP, Managing Director  
Omnichannel Solutions

**Precision AQ**

*The new name for Across Health*

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## About us

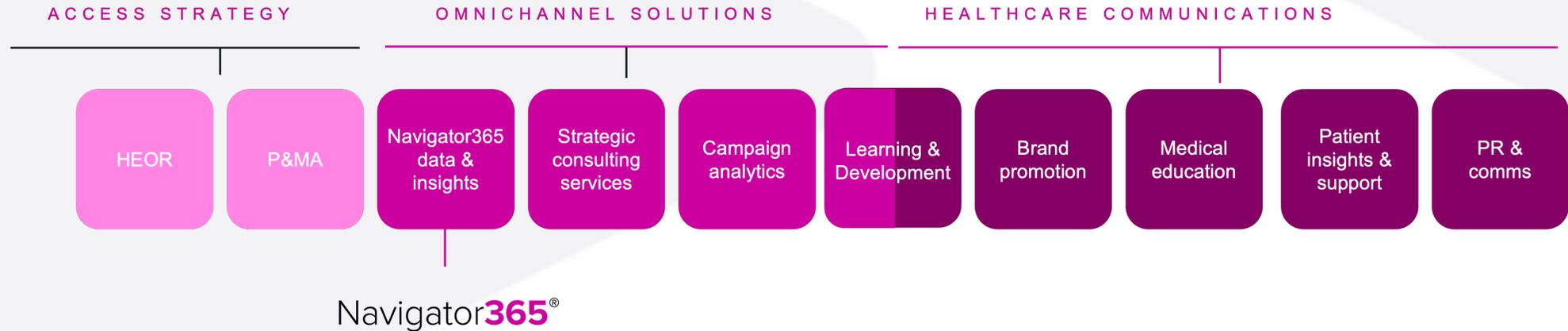
Across Health, along with the entire Precision Value & Health team (of which we have been a part since February 2021), is now unified under one name: **Precision AQ**. This new brand marks a pivotal moment as it **unites Across Health with all other Precision teams under one cohesive identity**.

Having joined forces with over 1,200 life-science experts, advisors and creatives across 100+ diverse fields, we continue to partner with our clients to deliver evidence-based omnichannel engagement strategies while empowering access to life-changing medicine for all.



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## Introduction

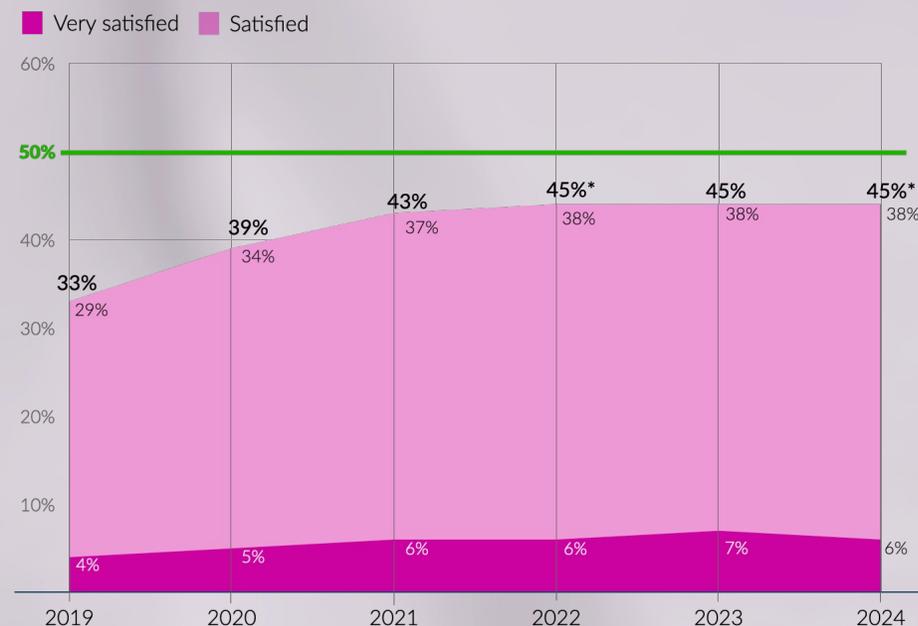
In recent years, the pharmaceutical industry has experienced major changes in how it engages healthcare professionals (HCPs), with digital and omnichannel strategies becoming central to many companies' efforts. In 2023, digital budgets accounted for almost a third (32%) of marketing allocations – an all-time high. However, 2024 marked a decline, with **digital budgets dropping to 2020 levels (24%)**.

This decrease coincides with a **plateau in satisfaction levels**, as both pharma staff and HCPs reporting stagnation in their digital engagement experiences. Additionally, **self-reported digital knowledge within the biopharma sector has fallen** for the third consecutive year, prompting questions about whether organisations have the expertise to navigate an increasingly digital/omnichannel world effectively.

Despite these setbacks, **HCP demand for digital and omnichannel engagement continues to exceed supply. Industry leaders are setting higher standards** for systematic, company-wide omnichannel approaches, excelling across online and offline channels. Their success highlights the importance of consistency, integration, and customer-focused strategies in today's restricted access environment.

The need for robust evidence and strategic benchmarking remains stronger than ever. With budget constraints, aligning investments with, by now, firmly established HCP expectations is vital. And if pharma is going to pursue exciting new technologies like AI it must first **ensure the foundational capabilities are in place**. While the challenges are significant, so are the opportunities for companies willing to innovate and prioritise omnichannel consistency.

SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, EU5, 2019-2024



\*Total due to rounding

Source: Navigator365™ Core, EU5 specialists, 2019 (n=4885), 2020 (n=5529), 2021 (n=5041), 2022 (n=4718), 2023 (n=4031) and 2024 (n=3877)

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# HCP engagement

1. Key HCP engagement KPIs
2. Channel performance maps
3. The digital divide
4. HCP satisfaction with biopharma's digital offerings
5. Channel affinity: F2F vs non-personal channels
6. Use of ChatGPT by UK cardiologists
7. The value of AI according to German specialists

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# 1. Key HCP engagement KPIs

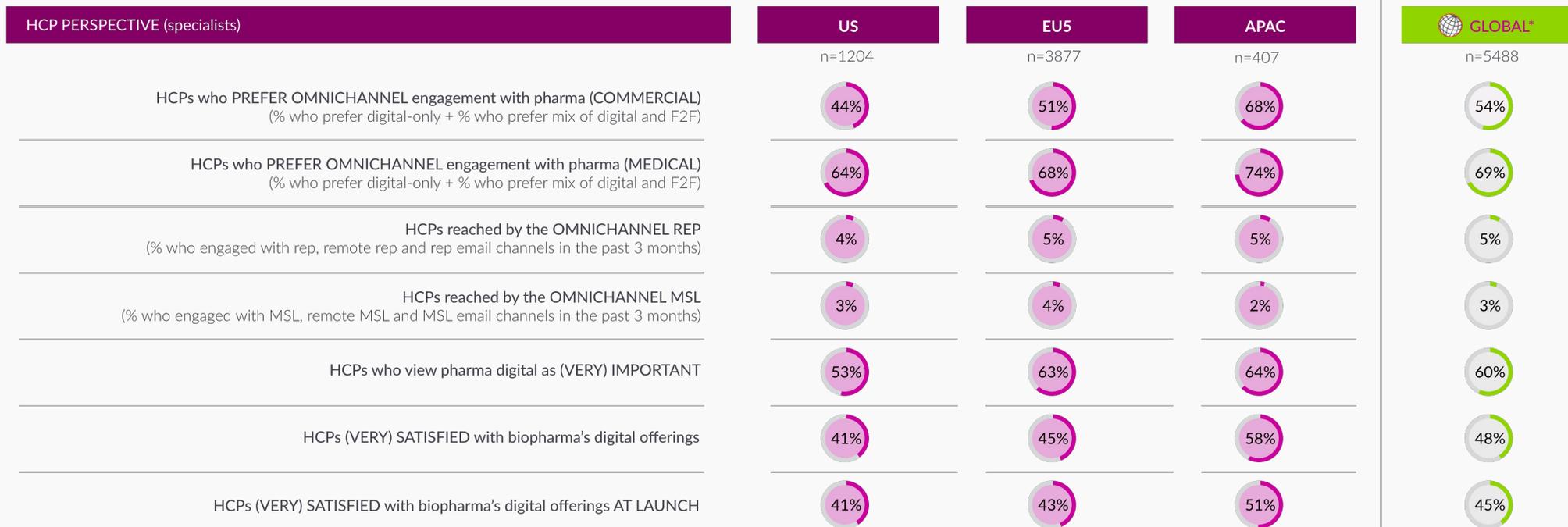
When it comes to commercial engagement with biopharma (traditionally achieved largely via the rep visit), around **half of specialists prefer an omnichannel approach** (defined here as a preference for either digital-only engagement or digital combined with in-person interaction). The demand shifts even higher when we look at medical (educational) engagement.

Yet, **no more than 5% of specialists are being served by the so-called 'omnichannel rep'** (engagement with a rep via remote detailing, email and F2F visits), and the results are even 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 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 forward-thinking leaders a big opportunity to pull further ahead from the competition.

## HCP ENGAGEMENT KPIs – SPECIALISTS, 2024



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

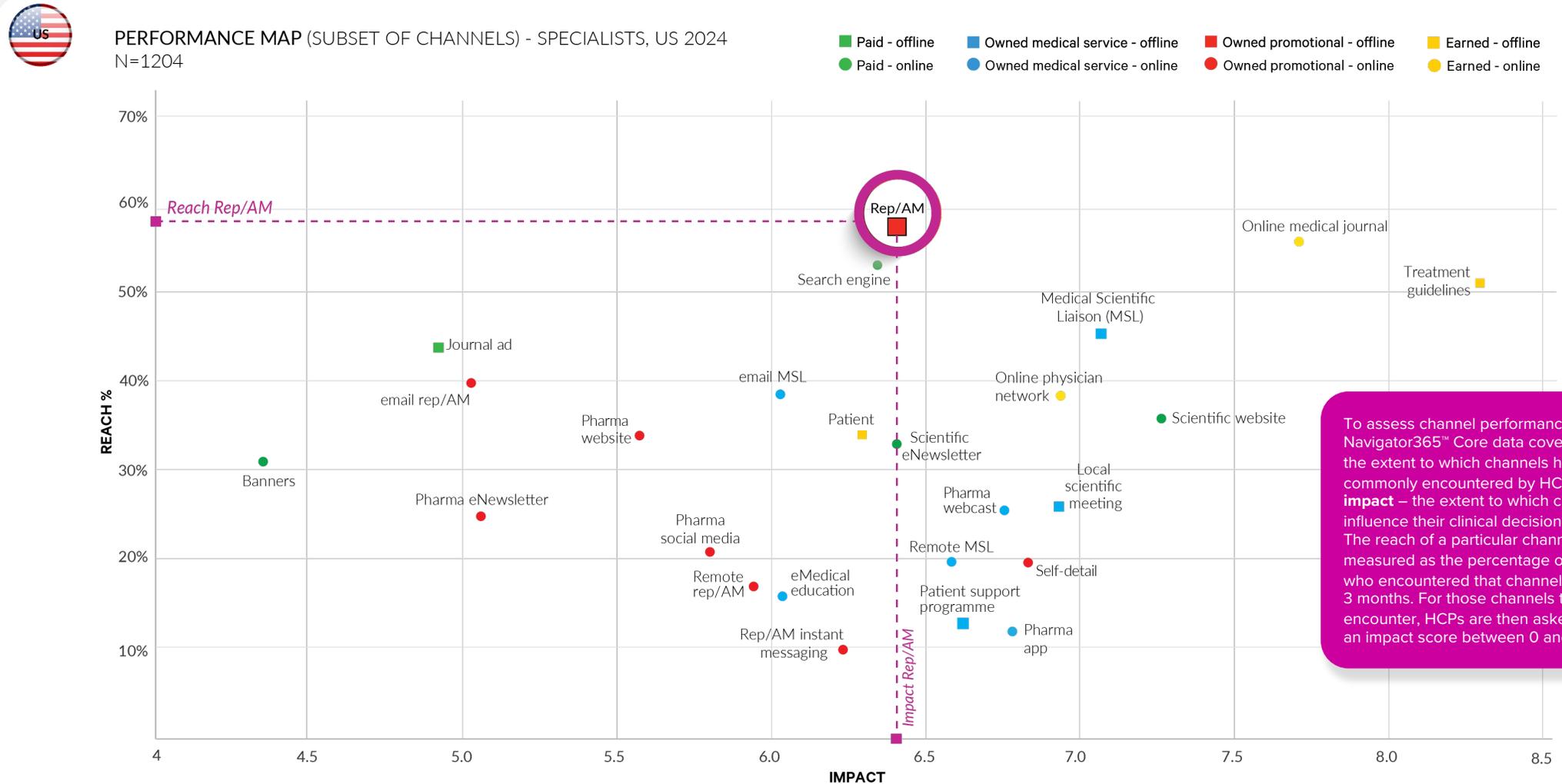
Source: Navigator365™ Core, all specialists, 2024, consolidated data



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## 2. Channel performance (US)

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 2024.



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.

Source: Navigator365™ Core, US, all specialists, 2024 (n=1204)





## 2. Channel performance (APAC)

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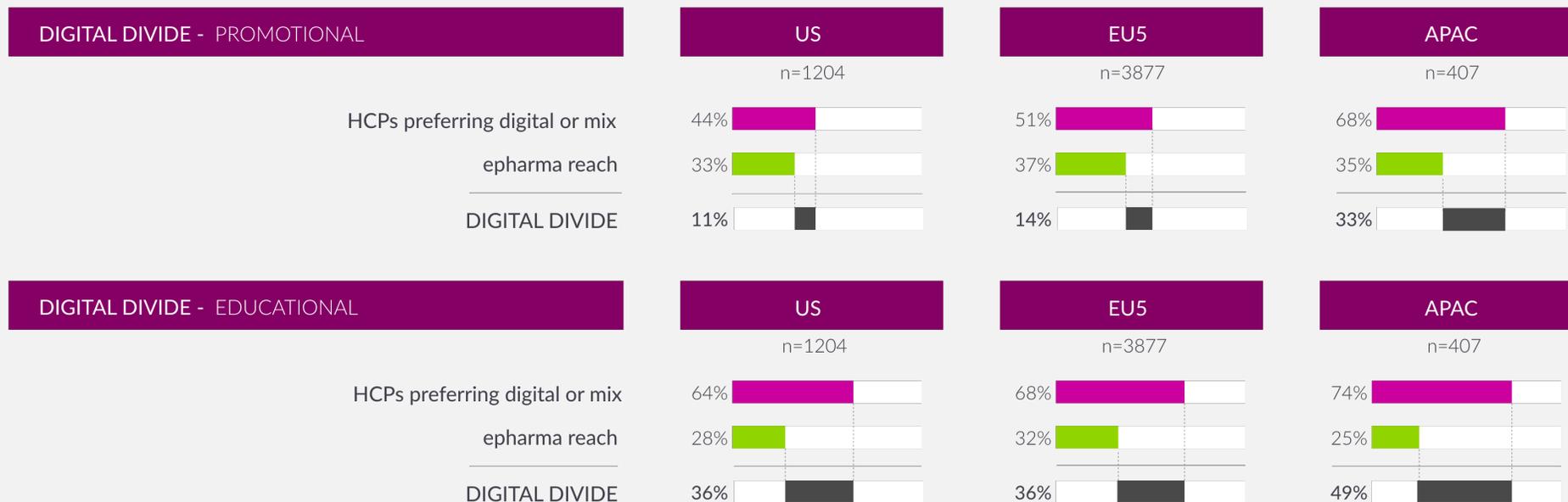


### 3. Digital divide shows pharma is not meeting HCP demand for digital/omnichannel engagement

**The digital divide assesses how well biopharma is meeting specialists' channel preferences.** 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 and even lower supply. While this gap shows pharma's failure to meet HCP needs, it also offers a big chance for companies to stand out from competitors.

#### DIGITAL DIVIDE - ALL SPECIALISTS, 2024



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, 2024, consolidated data

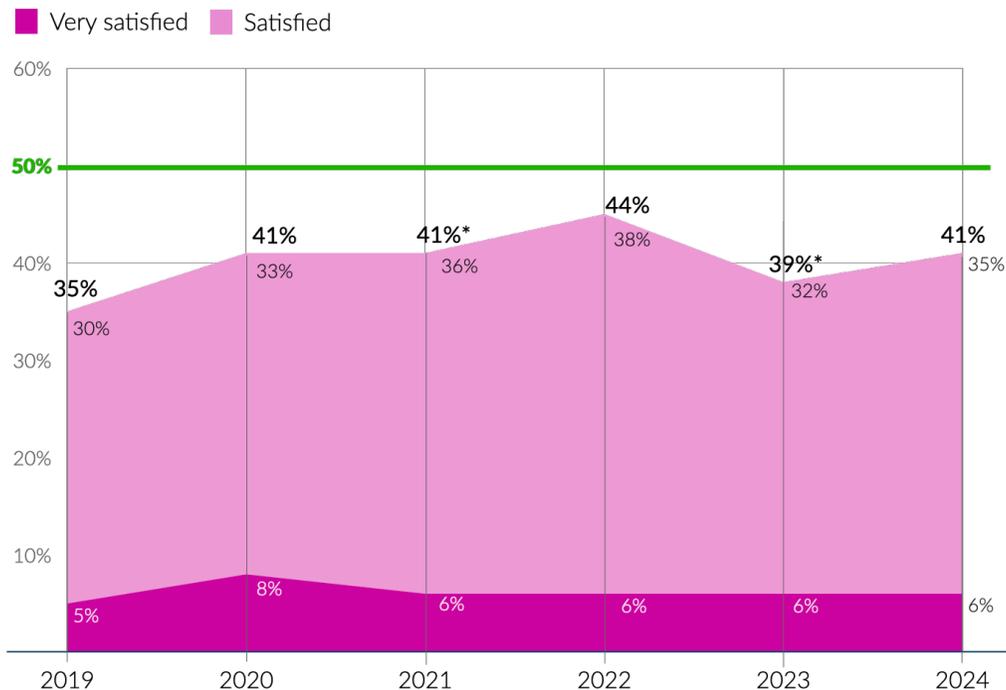


## 4. HIGHLIGHT: HCP satisfaction with biopharma's digital offerings has stagnated and remains below 50%

In the US, satisfaction among specialists saw a pandemic-related rise but has since dropped. Most HCPs remain either neutral about – or, worse, dissatisfied with – biopharma's digital efforts, with the proportion describing themselves as "very satisfied" showing almost no change for the past few years. A similar trend is seen in EU5, where satisfaction initially improved but has since levelled off. Clearly a more coordinated organisation-wide approach is critical if the industry is to break through that (so far) elusive 50% barrier, let alone excel.



SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, US, 2019-2024

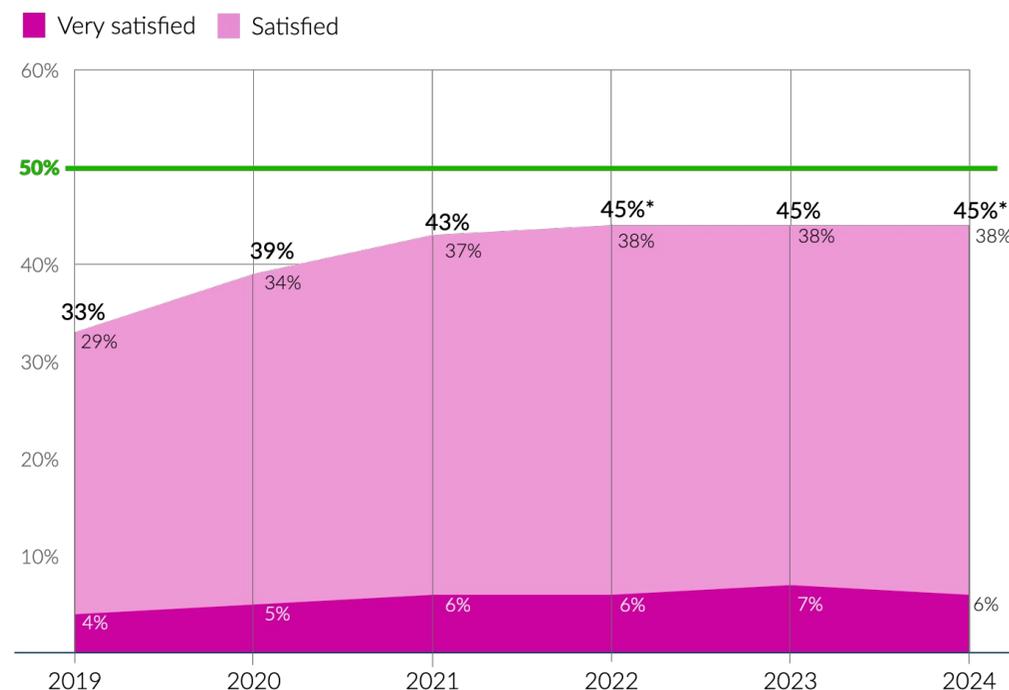


\*Total due to rounding

Source: Navigator365™ Core, US specialists, 2019 (n=818), 2020 (n=1303), 2021 (n=2071), 2022 (n=2208), 2023 (n=1956) and 2024 (n=1204)



SATISFACTION WITH PHARMA DIGITAL OFFERINGS - SPECIALISTS, EU5, 2019-2024



\*Total due to rounding

Source: Navigator365™ Core, EU5 specialists, 2019 (n=4885), 2020 (n=5529), 2021 (n=5041), 2022 (n=4718), 2023 (n=4031) and 2024 (n=3877)

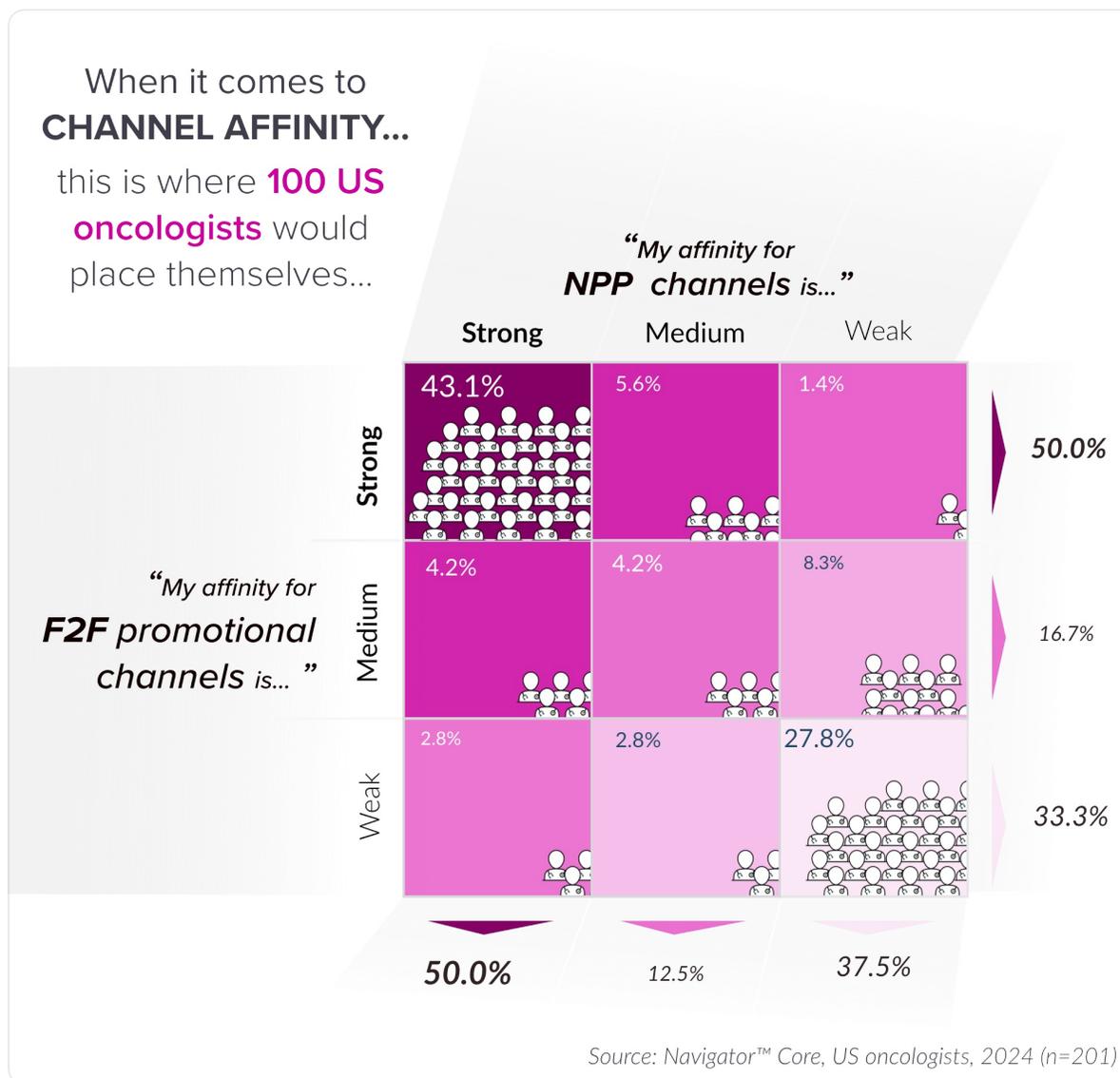


## 5. HIGHLIGHT: Omnichannel engagement beats an “either/or” approach to face-to-face and non-personal channels

**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 half of this audience with strong commercial NPP, regardless of these customers’ level of affinity for F2F.**

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.

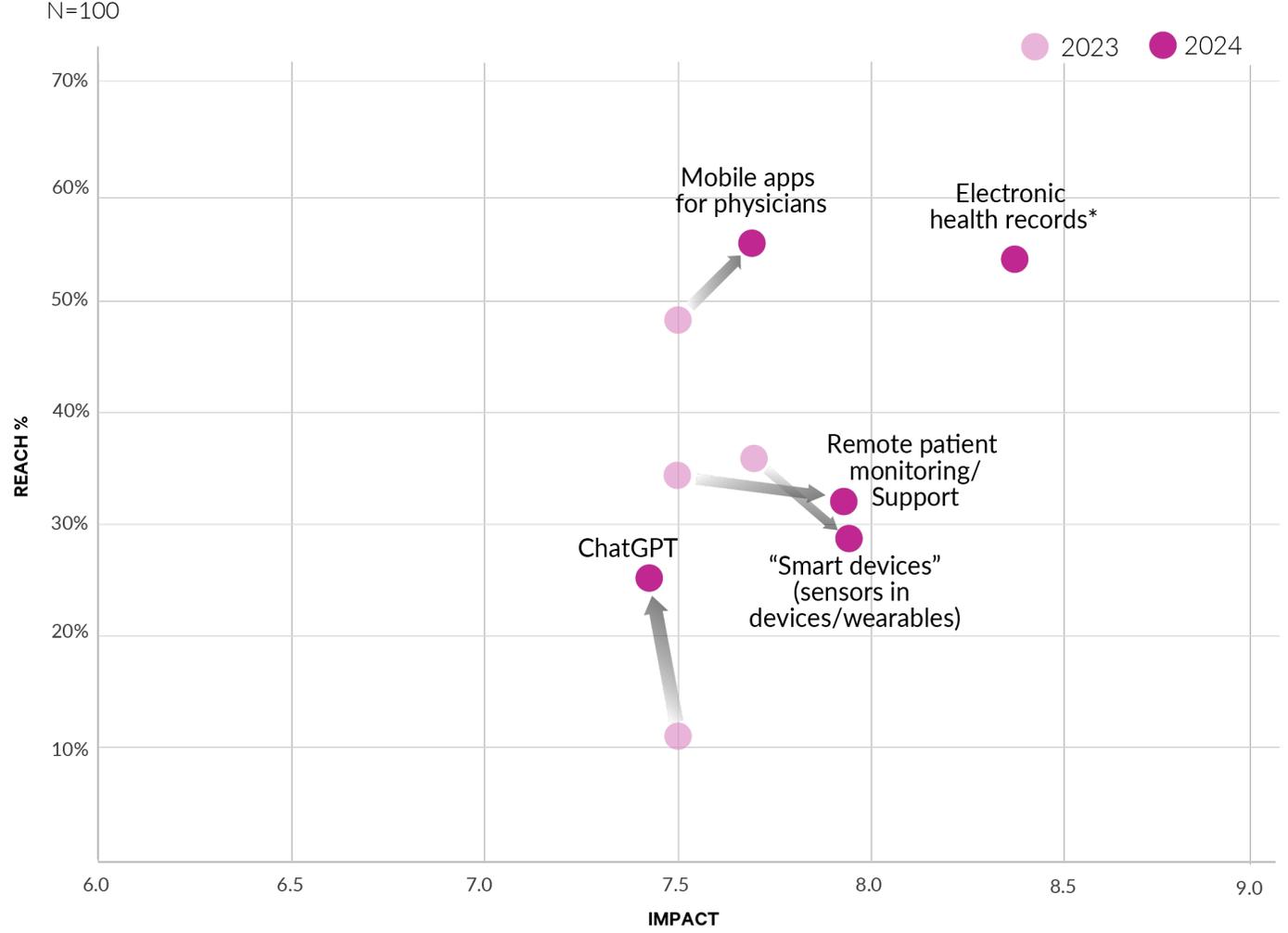
Meanwhile, at the other end of the continuum, as shown in the bottom right corner of the table, is the group that expresses a weak affinity for both F2F and NPP channels. For this group (the second biggest segment), which appears to be reluctant to engage directly with pharma channels, leveraging 3rd-party media or peer-to-peer communication through digital platforms may be beneficial.



## 6. HIGHLIGHT: Use of ChatGPT by UK cardiologists has increased significantly in a year

Asking UK cardiologists about their use of health tech tools, only one of the top 5 shows a significant vertical shift: ChatGPT (representing generative AI tools in general) saw its reach increase from 11% in 2023 to 25%. This means **a quarter of UK cardiologists had used a generative AI tool like ChatGPT in their daily practice** (not surprisingly, we see a similar trend for other countries and regions covered by our Navigator365™ data) – what will it look like in 2025?

HEALTH TECH PERFORMANCE MAP (TOP 5 TOOLS BY REACH) - CARDIOLOGIST, UK 2024  
N=100



\*2023 data not available

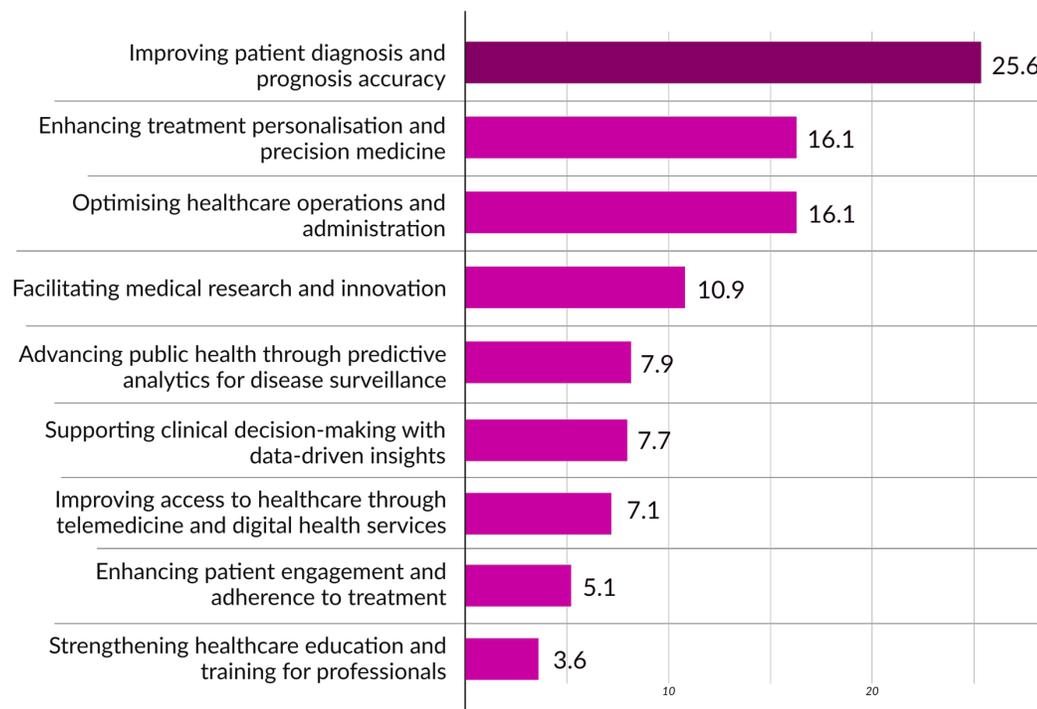
Source: Navigator365™ Core, UK, cardiologists, 2024 (n=100)



## 7. HIGHLIGHT: The value of AI according to German specialists

Asked to indicate their key areas in healthcare where AI might add the most value, our sample of German specialists rank 'improving patient diagnosis and prognosis accuracy' as the number one area. 'Enhancing treatment personalisation' and 'optimising healthcare operations' also score well. Notably, all options received a score, suggesting there's not one overriding area where AI could bring value.

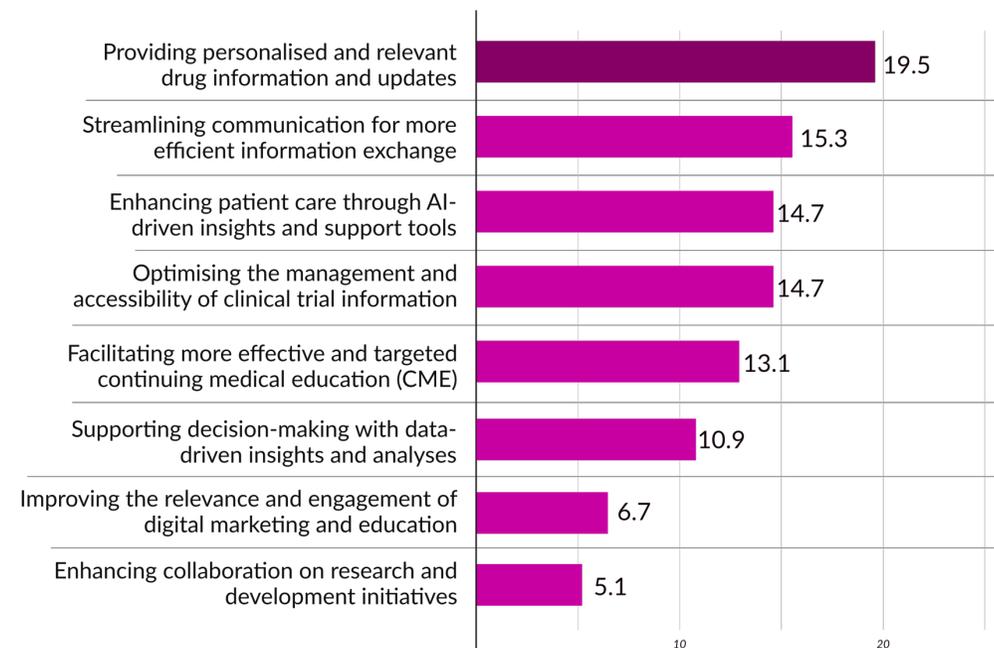
AREAS OF VALUE FOR AI IN HEALTHCARE - SPECIALISTS, GERMANY, 2024  
N=782



HCPs were asked to distribute 100 points to no more than 3 options  
Score = sum of points averaged among HCPs

Looking at where AI could enhance HCPs' interactions with pharma, Germany specialists clearly see a role for AI in improving the relevance and accessibility of pharma-provided information. This sits nicely alongside our 'What drives an optimal Cx?' data (see *Benchmark section*) that clearly indicate that HCPs are looking for service that is both valuable to them and convenient.

AREAS OF VALUE FOR AI IN PHARMA - SPECIALISTS, GERMANY, 2024  
N=782



Source: Navigator365™ Core, DE, specialists, 2024 (n=782)



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# LAUNCH trends

1. Preferred time for first engagement with new product content
2. Segmented view of preferred time for first engagement

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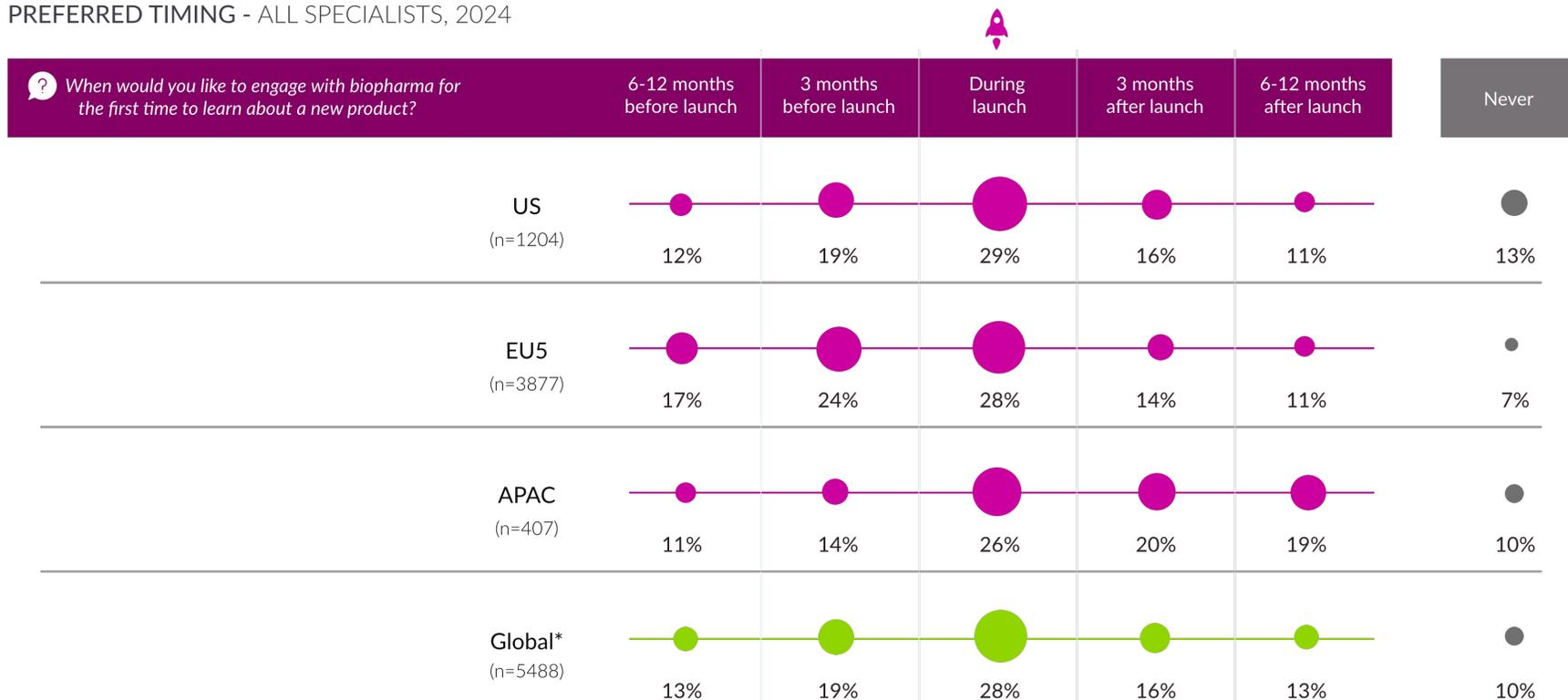
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# 1. Around a third of specialists prefer to start learning about a new product months before launch

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 (41%) and the lowest in APAC (25%).

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 and collecting nominative-level HCP insights through digital interactions will allow the Commercial team to have their own campaign fully optimised and ready to go on day 1 post-approval.

PREFERRED TIMING - ALL SPECIALISTS, 2024



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

Source: Navigator365™ Core, all specialists, 2024





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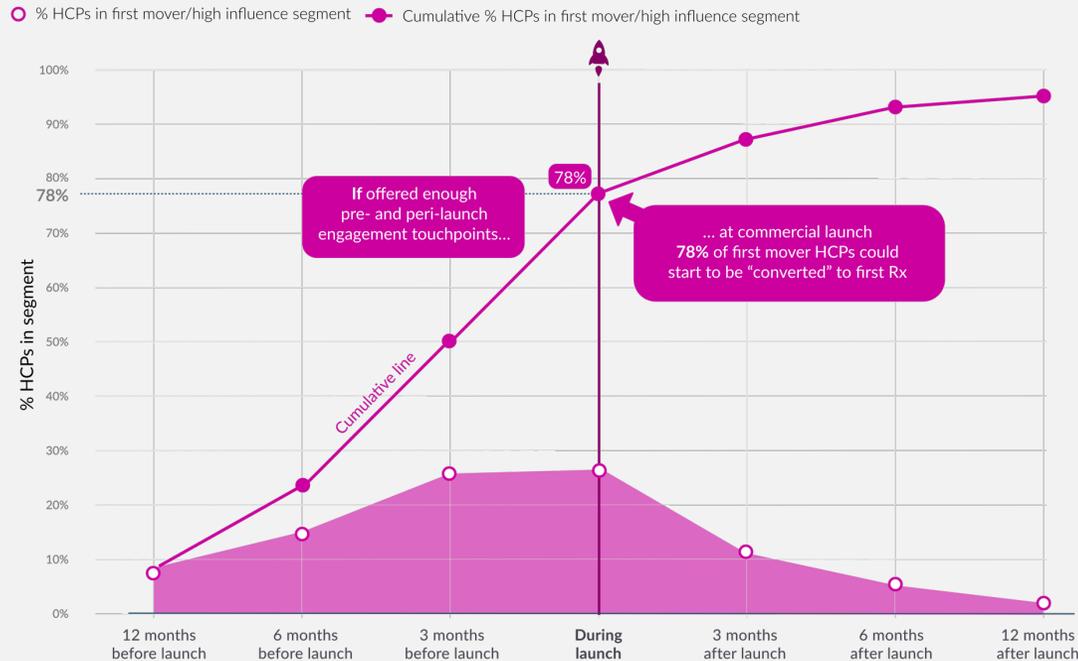
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## 2. HIGHLIGHT: Over a quarter of EU5 specialists are influential “first movers”, most of whom would benefit from pre-launch engagement

Based on the question “When do you start prescribing new products?” our research tells us that 49% of EU5 specialists categorise 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” (37%) while “late majority” (14%) HCPs won’t prescribe until a full safety profile is established. Incorporating specialists’ self-reported level of influence into the equation, identifies the **26% of prescribers who are both first mover & highly networked** – these are your top priority pre-launch segment.

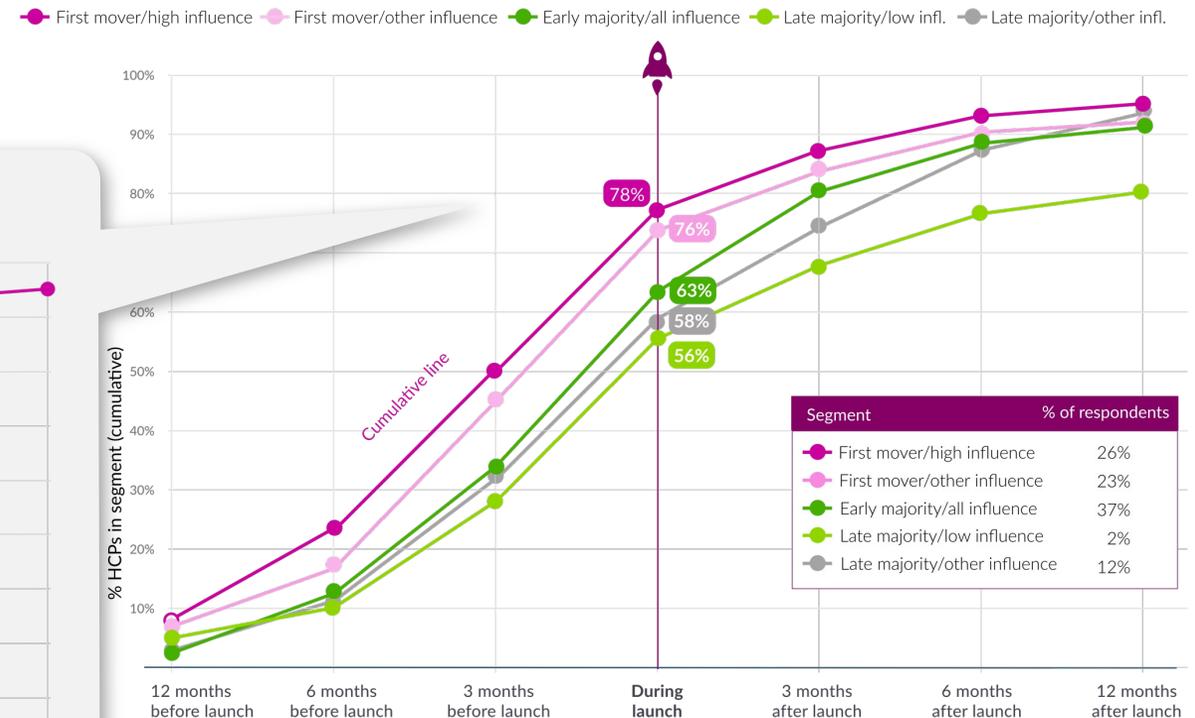
Offering enough pre-launch engagement touchpoints means this crucial segment can start the customer journey much sooner and can be “converted” to first Rx at commercial launch faster than HCPs who are still at the top or middle of the funnel at that stage.

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



Source: Navigator365™ Core, EU specialists, 2024 (n=1013)

PREFERRED TIME OF FIRST ENGAGEMENT FOR LAUNCH PRODUCT - ALL SEGMENTS



Source: Navigator365™ Core, EU specialists, 2024 (n=3850)



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# BENCHMARK analysis

1. Which companies are leading at the channel level in US?
2. Which companies are leading at the channel level in EU5?
3. What drives an optimal customer experience (Cx)?
4. How competitive Cx benchmarking could lead to improved business outcomes

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and Navigator365™ Cx Benchmark

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# 1. Which companies are leading at the channel level in US?

When we ask over 900 US specialists which companies are excelling across eight critical engagement channels – offline and online – the same names crop up again and again. What’s more, the data show these channel leaders are often far outpacing the second-place companies (the percentage figure shows the margin between the leader and the second closest company).

## Which companies are leading (US)?



	Rep	Remote rep	Website	MSL	Remote MSL	Webcast	Offline medical conference	Patient support programme	
<b>CARDIOLOGISTS</b> (n=150)	AstraZeneca (23%)	AstraZeneca (31%)	AstraZeneca (20%)	AstraZeneca (43%)	AstraZeneca (15%)	AZ & Abbott (38%)	AstraZeneca (10%)	Pfizer (4%)	23%
<b>DERMATOLOGISTS</b> (n=152)	abbvie (48%)	abbvie (48%)	abbvie (35%)	abbvie (54%)	abbvie (25%)	abbvie (32%)	abbvie (61%)	abbvie (12%)	39%
<b>HEMATOLOGISTS</b> (n=147)	AstraZeneca (27%)	abbvie (14%)	AstraZeneca (25%)	AstraZeneca (12%)	Novartis & BMS (8%)	AstraZeneca (23%)	AstraZeneca (23%)	Bristol Myers Squibb (6%)	17%
<b>NEUROLOGISTS</b> (n=150)	abbvie (39%)	abbvie (3%)	abbvie (37%)	abbvie (49%)	abbvie (29%)	ALEXION (8%)	abbvie (20%)	abbvie (20%)	26%
<b>ONCOLOGISTS</b> (n=150)	AstraZeneca (28%)	AstraZeneca (41%)	AstraZeneca (20%)	AstraZeneca (29%)	AstraZeneca (10%)	Bristol Myers Squibb (1.1%)	AstraZeneca (33%)	AstraZeneca (4%)	22%
<b>RHEUMATOLOGISTS</b> (n=152)	abbvie (48%)	abbvie (38%)	abbvie (42%)	abbvie (51%)	abbvie (33%)	abbvie (62%)	abbvie (42%)	abbvie (37%)	44%
	average margin 36%	29%	30%	40%	20%	29%	32%	14%	

7x AstraZeneca

8 in a row! abbvie

5x AstraZeneca

7x abbvie

7x AstraZeneca

8 in a row! abbvie

% = % margin between leader company and second place company

Source: Navigator365™ Core, US specialists, 2024

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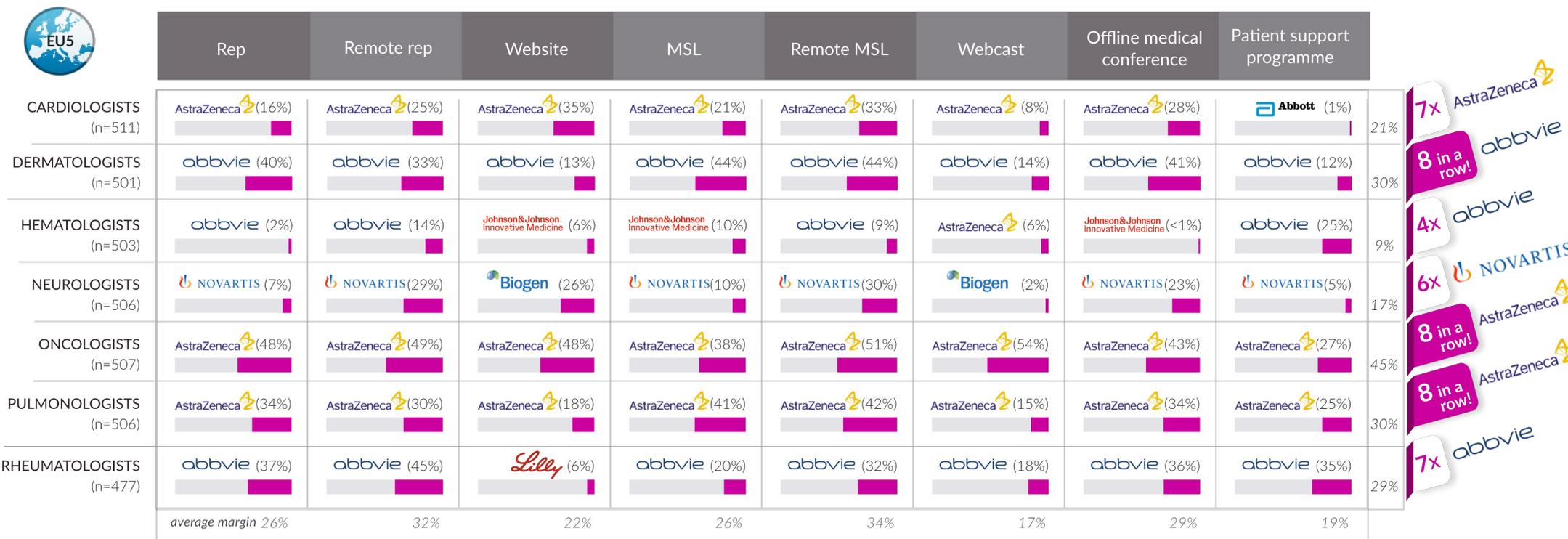
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## 2. Which companies are leading at the channel level in EU5?

Surveying 3500 European specialists gives a similar picture. Our data show that HCPs increasingly favour an omnichannel customer-centred approach while access becomes more and more restricted. Disconnected engagement efforts and isolated “pockets of excellence” are no longer sufficient. The likes of AstraZeneca, Abbvie and Novartis are setting a new standard for consistency in omnichannel HCP engagement, showing that companywide, systematic approaches are key to leading in today’s competitive landscape.

### Which companies are leading (EU5)?



% = % margin between leader company and second place company

Source: Navigator365™ Core, EU specialists, 2024

Don't see your specialty of interest here? Please **get in touch**.

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### 3. What drives an optimal Cx?

As in other sectors, customer experience (the overall perception and impression a customer has of your brand based on their interactions across all touchpoints) is becoming a critical factor in biopharma engagement with HCPs. As expectations evolve, delivering personalised, seamless interactions is key to building trust and driving meaningful connections. Asking specialists to rank in importance these seven key drivers shows that respondents from our three key markets are looking for a customer experience from pharma that is both valuable to them, in terms of the quality and relevance of the information that is being communicated, and convenient. It's clear that pharma needs to engage in a way that puts the customer at the centre of any interaction, by providing the information the HCP needs at a time and in a way that suits them best.

DRIVER:	GLOBAL	US	EU5	APAC
	n=4314	n=399	n=2517	n=1398
Knowledgeable staff	1st	1st	1st	1st
Easy to contact/engage with	2nd	2nd	2nd	2nd
Fast response/feedback	3rd	3rd	4th	3rd
Respects my time	4th	4th	3rd	4th
Knows my professional interests	5th	5th	5th	5th
I can get information & service through any channel	6th	6th	7th	6th
Knows & respects my channel preference	7th	7th	6th	7th

Source: Navigator365™ Cx Benchmark, all specialists, 2024

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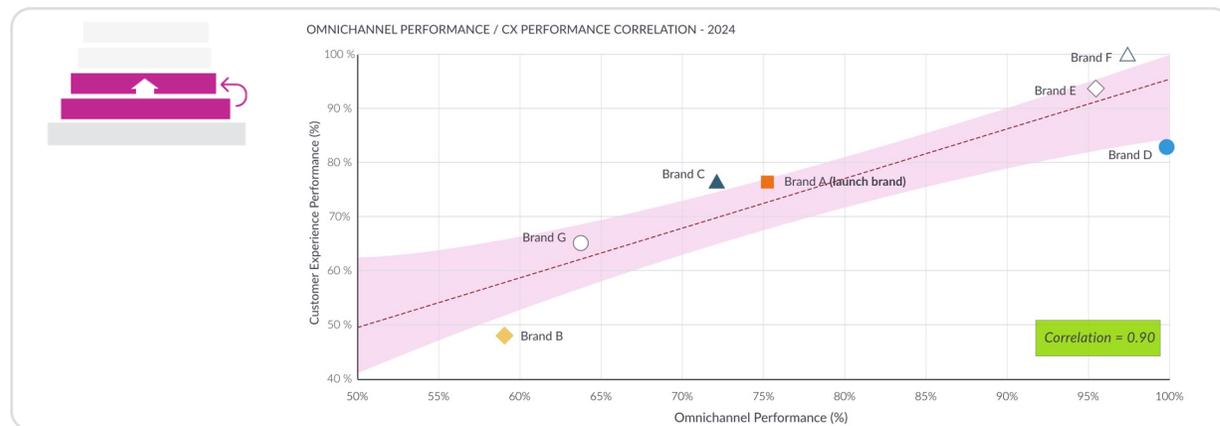
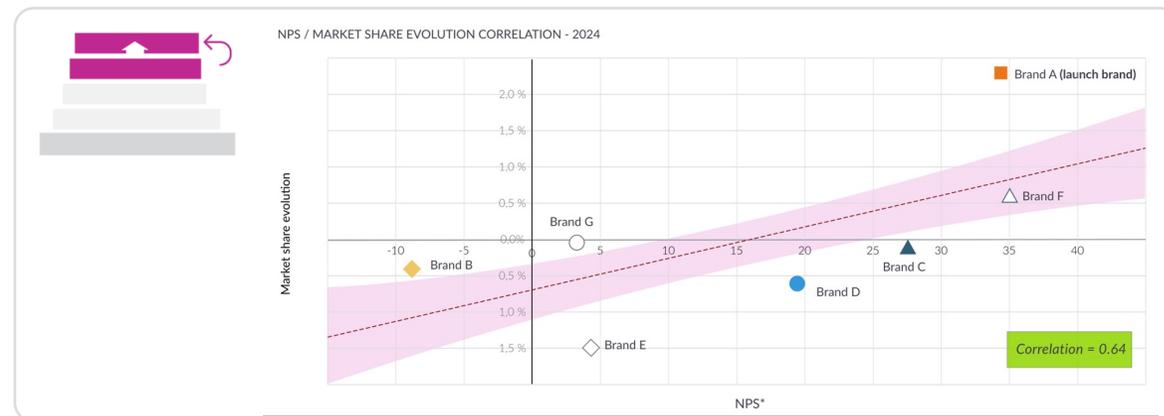
## 4. HIGHLIGHT: How competitive Cx benchmarking could lead to improved business outcomes



Competitive Cx benchmarking is not just about understanding where you stand; it's about leveraging that insight to enhance omnichannel engagement, boost customer satisfaction, and ultimately drive better business outcomes. Only with an understanding of relative position as well as the capability to plan and execute evidence-driven strategies that drive greater performance can companies hope to close the gap with the omnichannel leaders (see earlier in this section).

Navigator365™ brand-level benchmarking data reveal a positive correlation between omnichannel engagement and Cx performance. Cx is proven to have a substantial influence on NPS. And – as shown by coupling recent Cx Benchmark data (n=252 prescribers across 5 markets) with client-provided data – NPS\* is a key predictor of sales and market share evolution.

\* Net Promoter Score (NPS) is calculated by subtracting the percentage of detractors from the percentage of promoters.



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# INDUSTRY performance

1. Omnichannel maturity: The four dimensions of successful change
2. Industry satisfaction
3. Evolution of digital budgets
4. Digital knowledge levels continue to decline
5. Pharma must connect 'reach' with conversion KPIs to measure true ROI
6. HQs plan to shift to co-created campaigns
7. The state of AI in omnichannel customer engagement

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**Maturometer™**

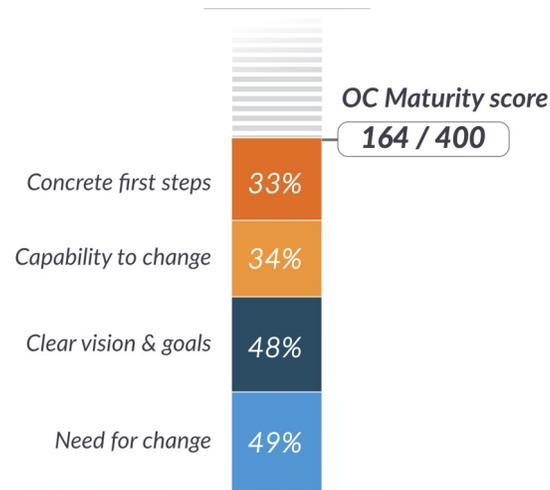
more information: [precisionaq.com/intl-maturometer](https://precisionaq.com/intl-maturometer)

# 1. Omnichannel maturity: The four dimensions of successful change

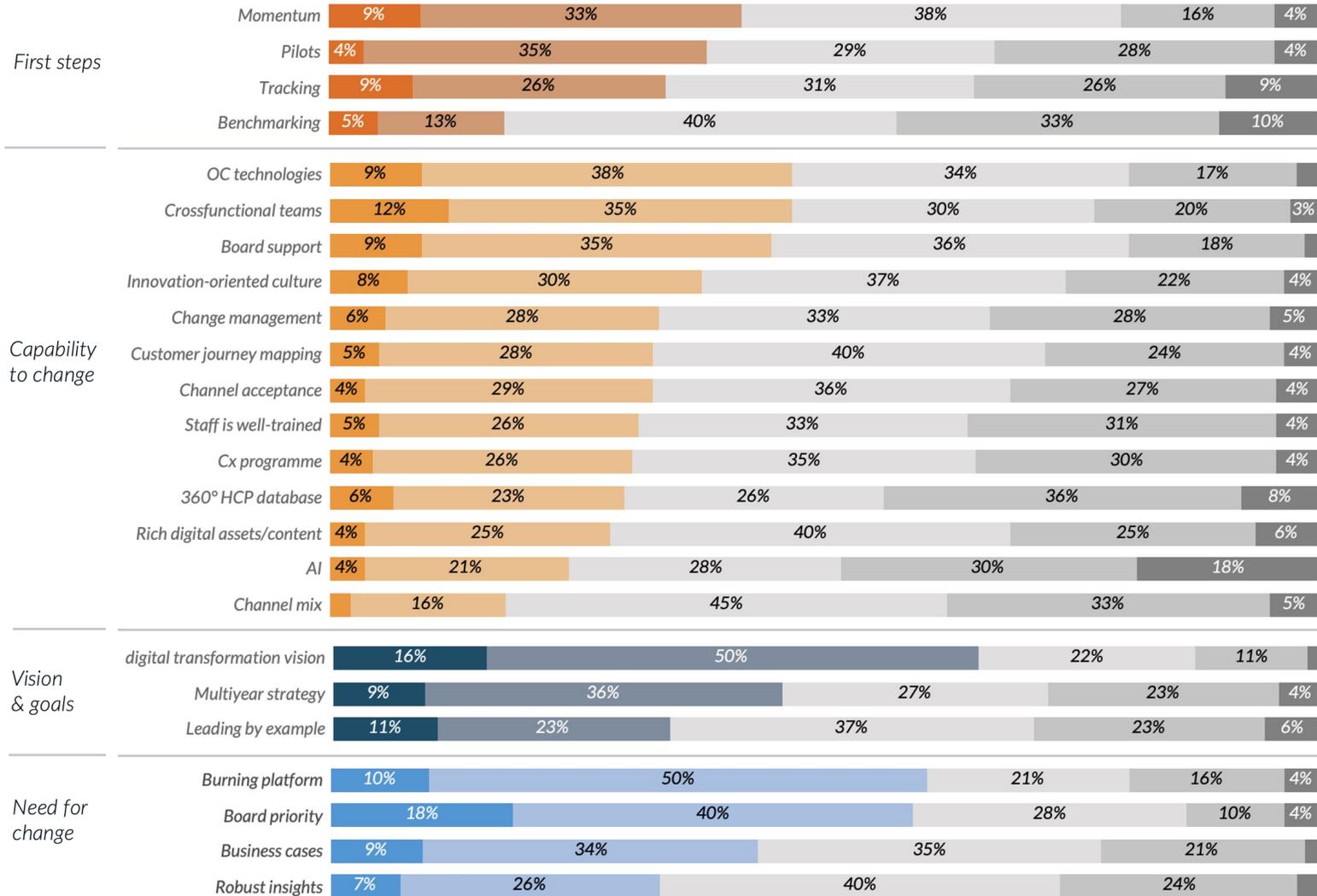
The Precision AQ Omnichannel Maturity Index\* gives an overall picture of the industry's performance across four key dimensions needed for successful change.

Within each of the four dimensions, respondents from the pharma industry 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.

*\*Inspired by Dannemiller's variation of the Gleicher formula (Source: Dannemiller and Jacobs, Journal of Applied Behavioural Science, 1992)*



"How is my company doing in this area"  
PERFORMANCE, EU Biopharma, 2024 (n=141)



Totals of Extremely positive and Positive answers (coloured bars) are used to arrive at the index score.

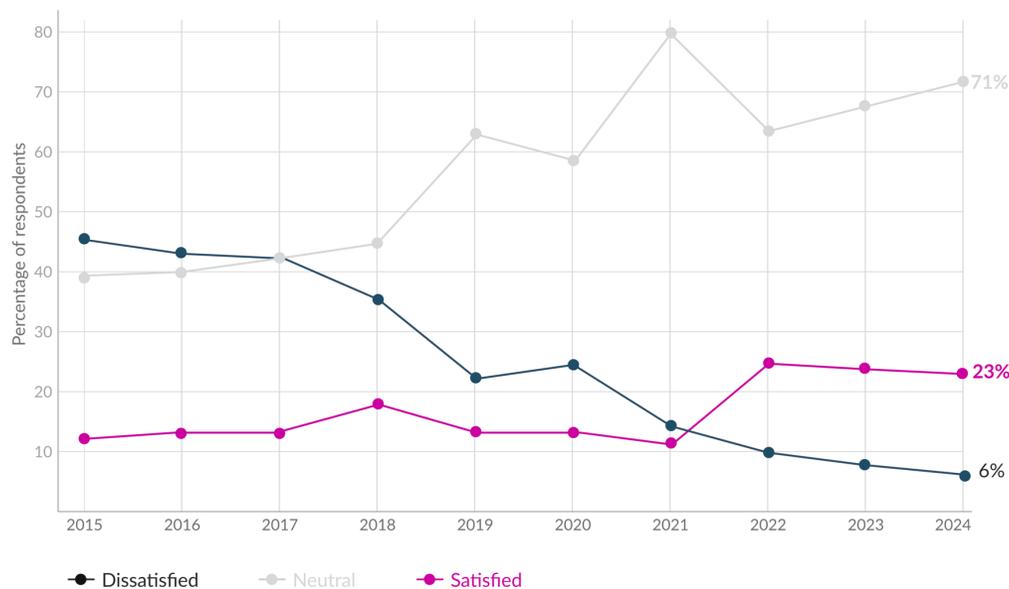
Source: Maturometer™ 2024, EU Biopharma, n=141



## 2. Though few are dissatisfied, most staff are neutral about (not satisfied with) their omnichannel efforts

Although the proportion of ‘dissatisfied’ respondents is decreasing, we’re not seeing much movement into the ‘satisfied’ category, which remains stable but low at 23%. Instead, the ‘neutral’ segment is growing. Can we identify what’s preventing the neutrals from becoming satisfied?

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

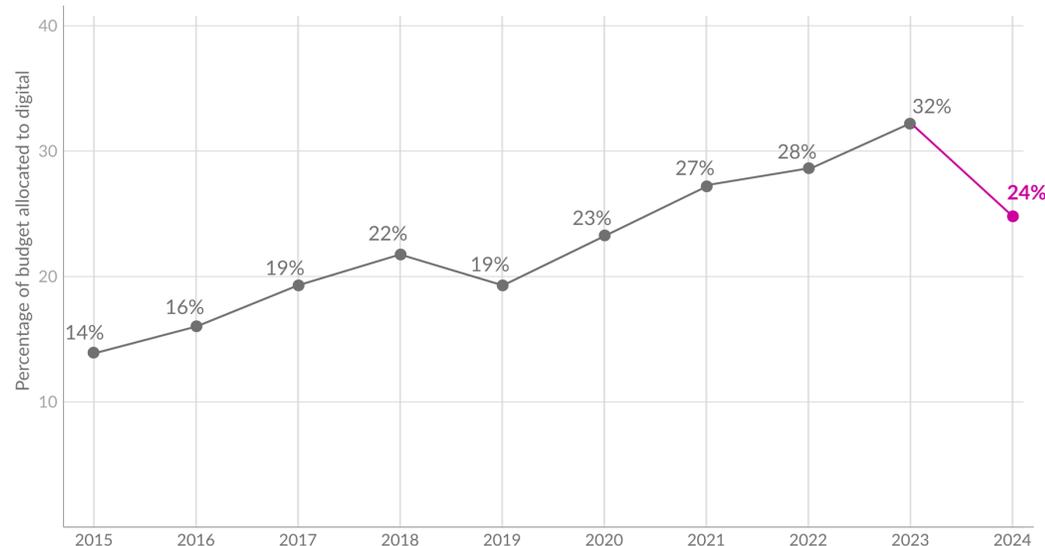


Source: Maturometer™ 2024, EU Biopharma (n=141)

## 3. Share of budget going to digital has declined, returning to 2020 levels

Alongside the decline in the overall maturity score, digital budgets have fallen back to 2020 levels after years of growth. Is this due to the industry failing to demonstrate robust impact from their omnichannel initiatives? If so, this highlights the need for external benchmarking to help prioritise investments strategically. This drop has widened the gap between pharma and B2B, with B2B estimated to allocate about 56% of its total budget to digital efforts (Gartner, 2022).

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



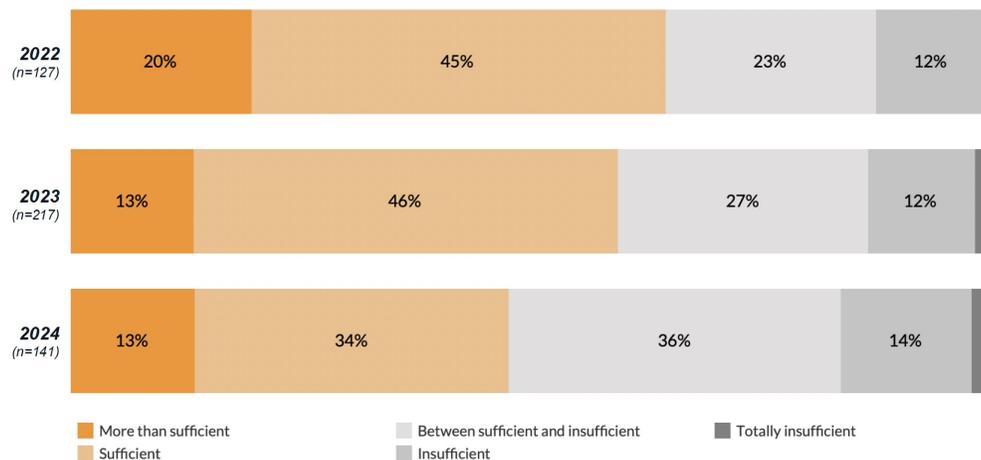
Source: Maturometer™ 2024, EU Biopharma (n=96)



## 4. HIGHLIGHT: Digital knowledge levels continue to decline for a third year in a row

The industry states that digital knowledge levels are going down. In a fast-moving world, are digital opportunities increasing faster than teams can keep pace with? Could more effective upskilling help here?

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

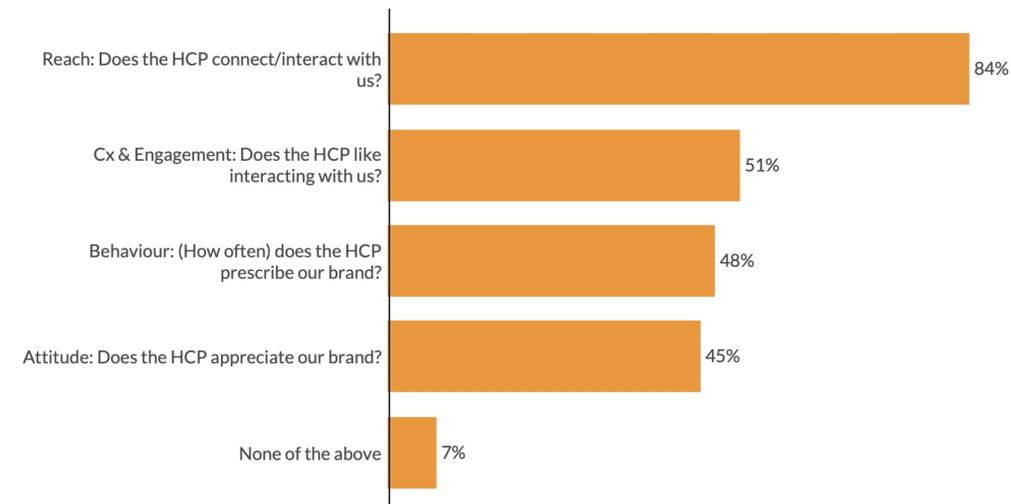


Source: Maturometer™ 2022-2024, EU Biopharma

## 5. HIGHLIGHT: Pharma must connect 'reach' with conversion KPIs to measure true ROI

When it comes to impact measurement (our data show ROI concerns remain a key barrier for digital), pharma is still very much focused on operational reach metrics (channel interaction levels). To gain a more comprehensive view of success, pharma needs to connect reach with outcome-oriented KPIs that can indicate attitudinal/behavioural conversion.

? Which of the following items can you track at the individual level throughout the launch cycle?



Source: Maturometer™ 2024, EU Biopharma (n=141)



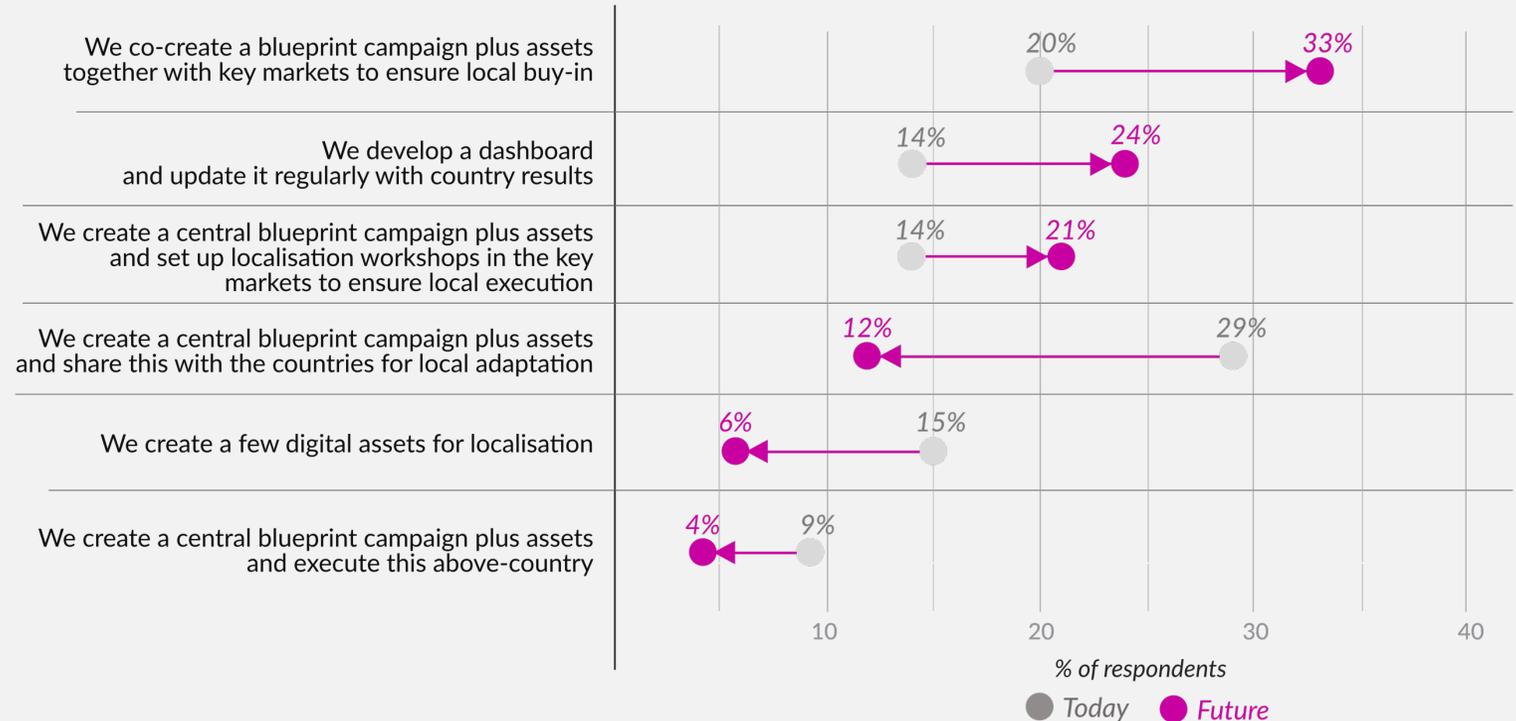
## 6. HIGHLIGHT: Headquarters plan to shift to co-created campaigns and improve local performance measurement

Today's reality is that many of the campaign blueprints and assets are still created centrally. However, HQs plan to shift from centrally-created campaigns and assets to greater co-creation with key markets to ensure better global-to-local buy-in.

Respondents also expressed a desire to improve performance measurement across markets. To achieve this, they will need: 1) An external party to consistently measure (across countries) key attitudinal KPIs with HCPs at the brand level, and/or 2) Reliable interaction data that is stored and interpreted consistently across brands, teams and countries.



HOW DO YOU (PLAN TO) INVOLVE LOCAL MARKETS IN YOUR DIGITAL PLANNING TODAY VS IN THE FUTURE?



Source: Maturometer™ 2024, EU Biopharma, n=53

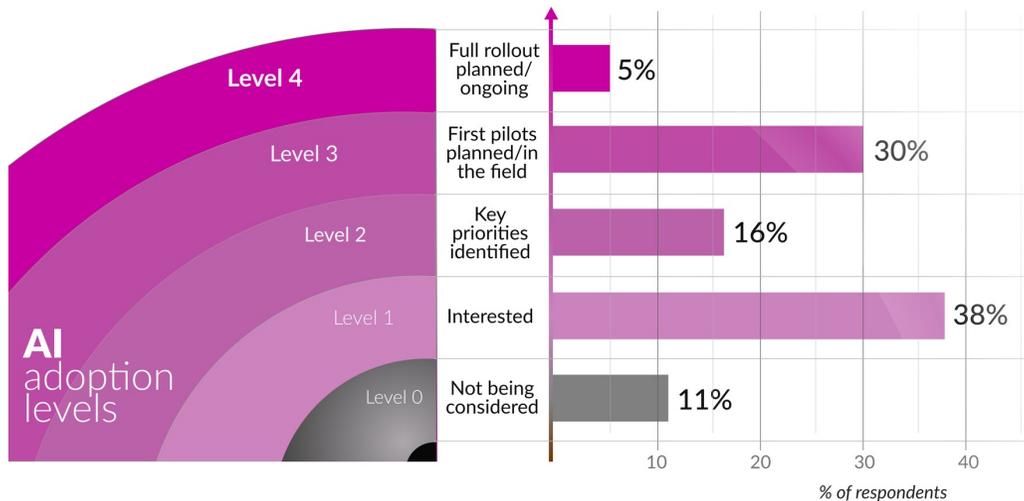


## 7. HIGHLIGHT: The state of AI in customer engagement

### There is significant interest in AI, but its effective implementation remains challenging

AI is a hot topic in many industries, and pharma is no exception. There is strong interest in incorporating AI into customer engagement efforts. But it's still early days for most companies... Are they finding it challenging to turn their AI ambitions into reality because the basics – particularly reliable and robust (and well structured) customer data – are not yet in place?

WHAT'S THE CURRENT LEVEL OF **ADOPTION OF AI** IN YOUR COMPANY'S CUSTOMER ENGAGEMENT EFFORTS?

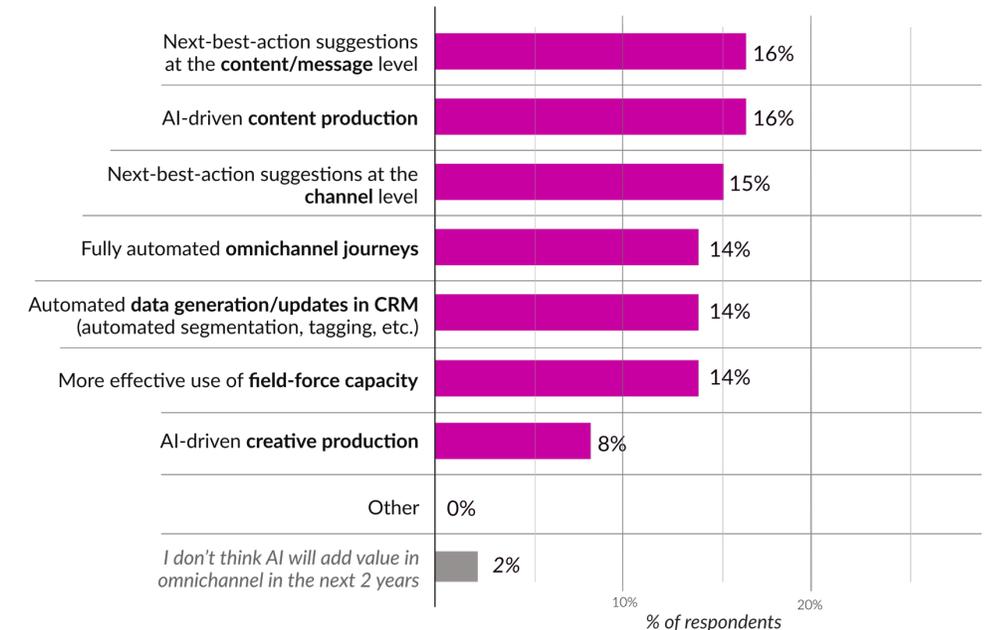


Source: Maturometer™ 2024, EU Biopharma, n=141

### 98% believe AI will add value, but there is no clear idea of where it will impact yet

While the overwhelming majority of respondents believe AI will add value to omnichannel customer engagement in the next 2 years, the wide range of responses suggests that most companies are still exploring exactly how AI might benefit their business. Pharma should be careful not to invest too much into these technologies without first having the foundational capabilities in place.

WHAT **AI SOLUTIONS** WILL HAVE THE BIGGEST VALUE IN THE OMNICHANNEL SPACE IN THE NEXT 2 YEARS?



Source: Maturometer™ 2024, EU Biopharma, n=141

more information: [precisionaq.com/intl-maturometer](https://precisionaq.com/intl-maturometer)



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## PAYER highlights

1. Payer engagement is crucial for pharma success
2. What do Payers think about biopharma's digital offerings?
3. Digital engagement is not meeting the needs of Payers
4. Preferred period for Payer-related info from pharma
5. Role of the pharma AM for Payers

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#### Navigator365™ Core

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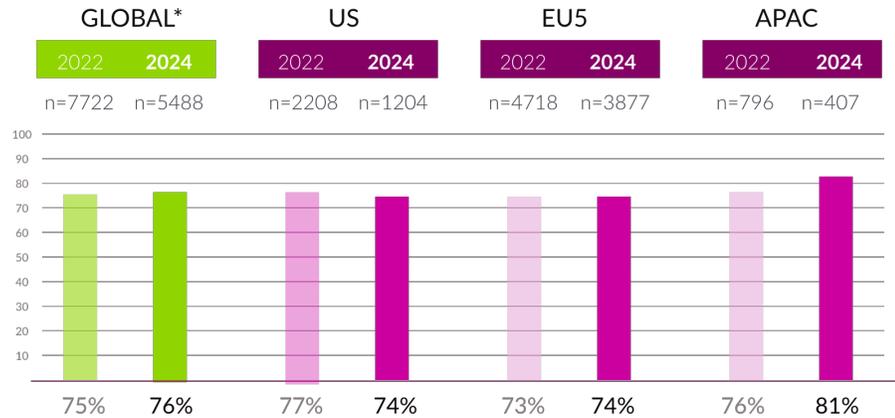
#### and Navigator365™ Payer

[precisionaq.com/intl-navigator365-payer](https://precisionaq.com/intl-navigator365-payer)

# 1. Payer engagement is crucial for pharma success

**Payers play a critical role in the allocation of healthcare resources**, and continue to exert a significant influence on specialists' clinical decision-making in all markets, particularly in APAC, where 'Payer power' (defined as the difference in influence between treatment guidelines and rep channels) was 81% more impactful than the rep.

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

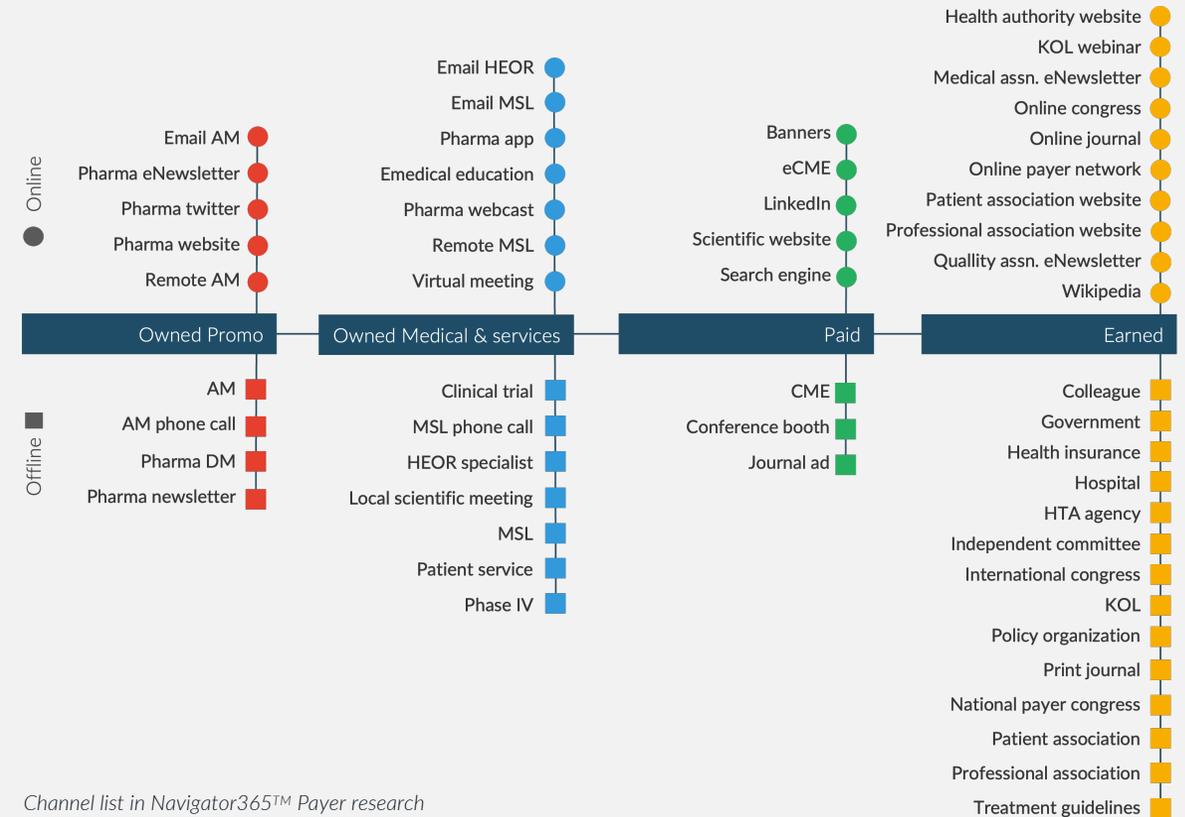


\*Global: US, EU5, APAC averaged (mean)

Source: Navigator365™ Core, all specialists, consolidated data

## Navigator365™ Payer

**Navigator365™ Payer** is based on the successful Navigator365™ Core and leverages similarly robust primary research among payers rather than HCPs, with a focus on payer-specific channels (shown below). On the following pages we share some highlights from research conducted among (subnational) payers in France and Spain in 2024.



Channel list in Navigator365™ Payer research

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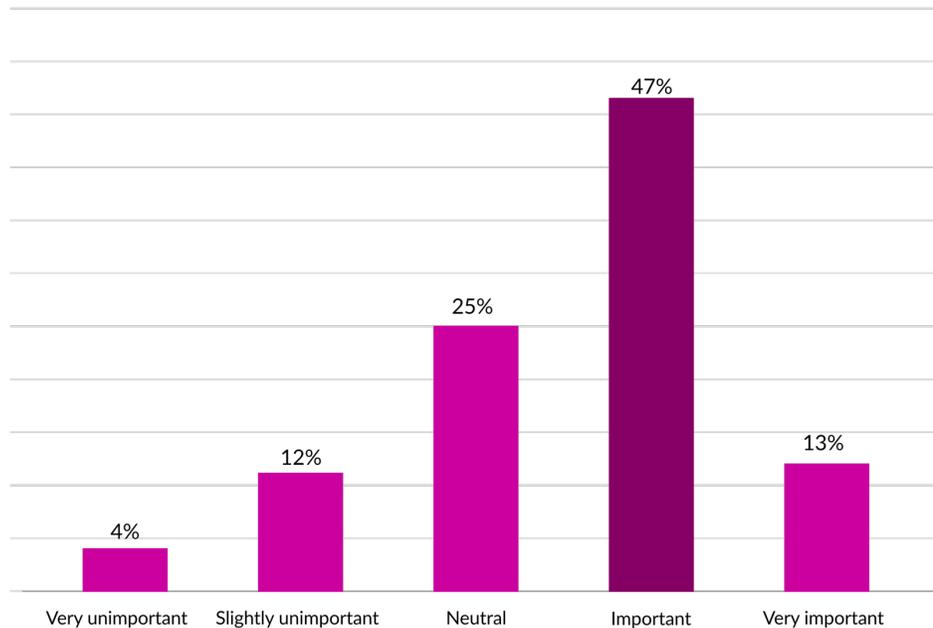
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## 2. HIGHLIGHT: What do French Payers think about biopharma’s digital offerings?

Just like with HCPs, payer engagement preferences have evolved quickly and biopharma needs to apply the same lessons when it comes to engaging effectively with these highly influential stakeholders.

The majority (60%) of French payers rate biopharma digital channels as (very) important. However, only a quarter say that “most biopharma companies” are providing them with digital content that is relevant to them as payers. On a positive note, almost half (49%) of respondents feel that the quality of online payer-related content offered to them by pharma has improved over the past year [data not shown here].

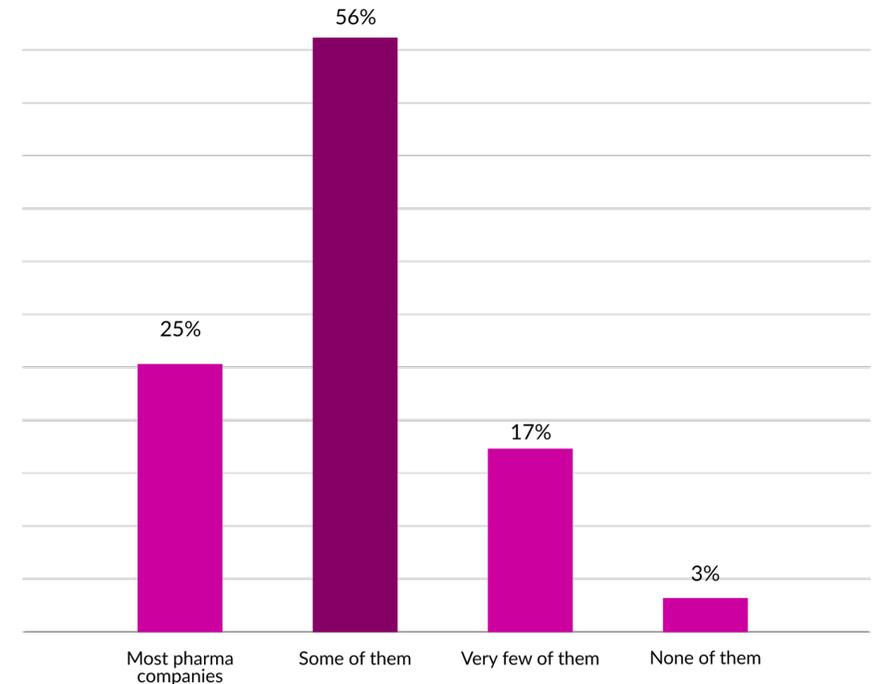
IMPORTANCE OF BIOPHARMA DIGITAL – PAYERS, FRANCE, 2024



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

Source: Navigator365™ Payer, French Payers, 2024 (n=77)

RELEVANT DIGITAL CONTENT FROM BIOPHARMA – PAYERS, FRANCE, 2024



% among respondents

Source: Navigator365™ Payer, French Payers, 2024 (n=77)





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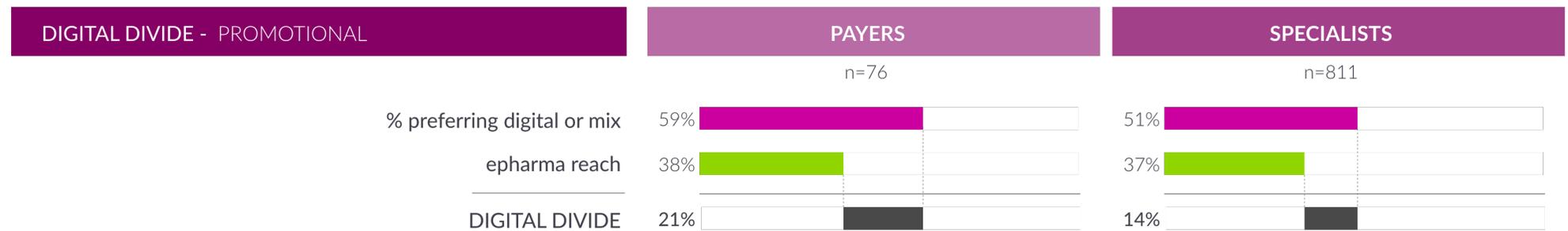
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### 3. HIGHLIGHT: Digital engagement from biopharma not meeting the needs of Spanish Payers

While 59% of Spanish 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 38%, creating a large opportunity to close this 'digital divide'.

Interestingly, when we look at the communication preferences of Spanish prescribers, only slightly fewer (51%) prefer digital-only or a mix. With this larger digital divide for payers (21%) than for prescribers (14%), customer-centric innovative biopharma companies can quickly create a sustainable competitive edge.

#### DIGITAL DIVIDE PROMOTIONAL - PAYERS VS SPECIALISTS, SPAIN, 2024



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')**

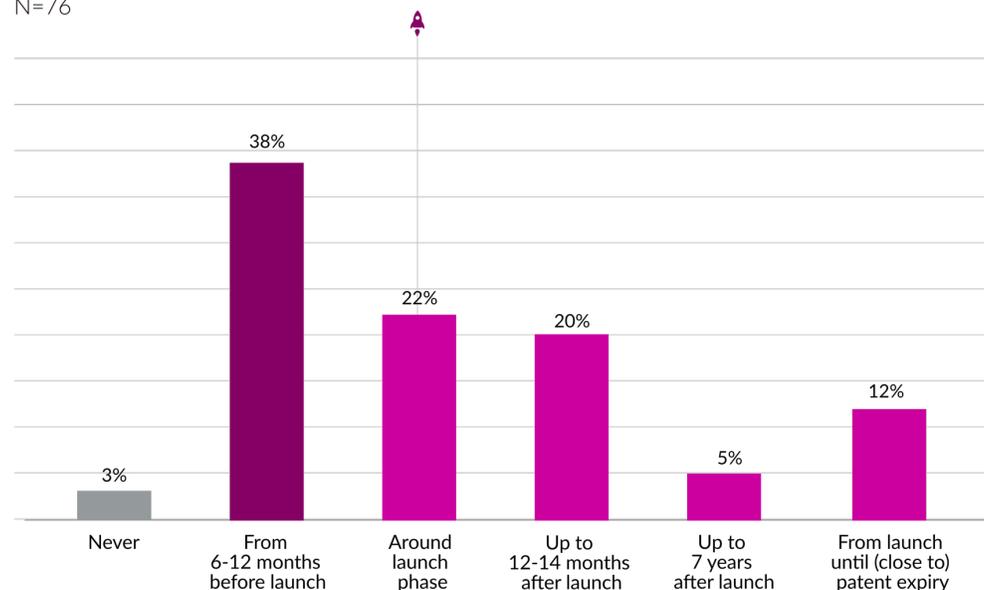
Source: Navigator365™ Payer, ES Payers, 2024 (n=76) and Navigator365™ Core, Specialists, 2024 (n=811)



## 4. HIGHLIGHT: Over a third of Spanish Payers prefer to hear from pharma no later than 6 months before launch...

Similar to HCPs (see *Launch section earlier*), the majority of payers (60%) in Spain would prefer to receive payer-related information from pharma either during or before launch, with almost 40% requesting pharma-provided info as early as a year prior to launch. It's clear that planning your engagement cannot start soon enough!

PREFERRED PERIOD FOR PAYER-RELATED INFO FROM PHARMA - PAYERS, SPAIN, 2024  
N=76



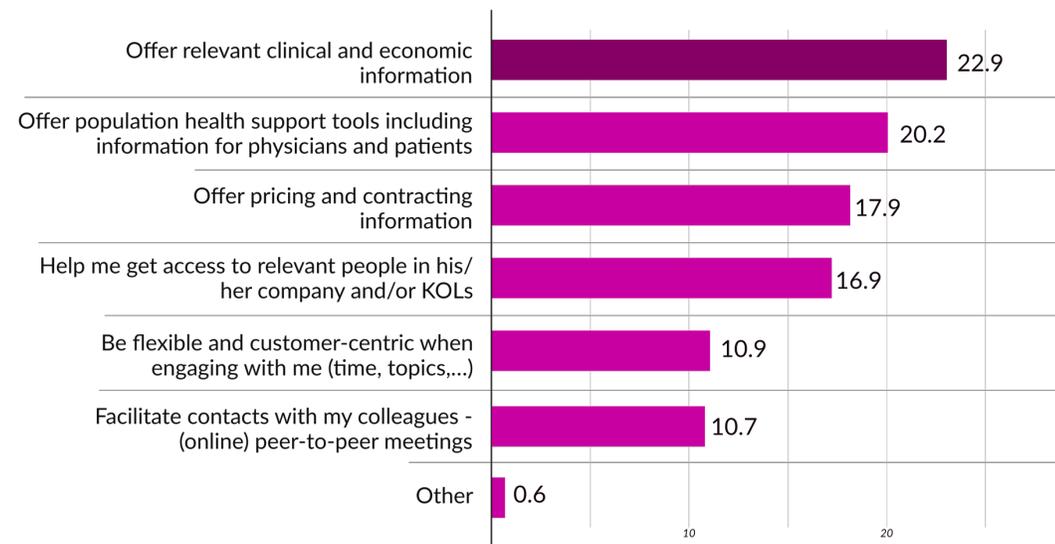
% among respondents

Source: Navigator365™ Payer, Spanish Payers, 2024 (n=76)

## 5. ...and rank 'offer relevant information' as the most important role of the pharma AM

When asked "What is the most important thing your AM could do to support you and your decision-making process?", the results show that, like HCPs, payers prioritise relevance of information provided by pharma, as well as valuing convenience and ease of access to the right people when they need it.

MOST VALUABLE CONTRIBUTION OF AM - PAYERS, SPAIN, 2024  
N=76



HCPs were asked to distribute 100 points to no more than 3 options  
Score = sum of points averaged among HCPs

Source: Navigator365™ Payer, Spanish Payers, 2024 (n=76)



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# CHANNEL metrics

1. About Navigator365™ Core
2. 2024 channel metrics

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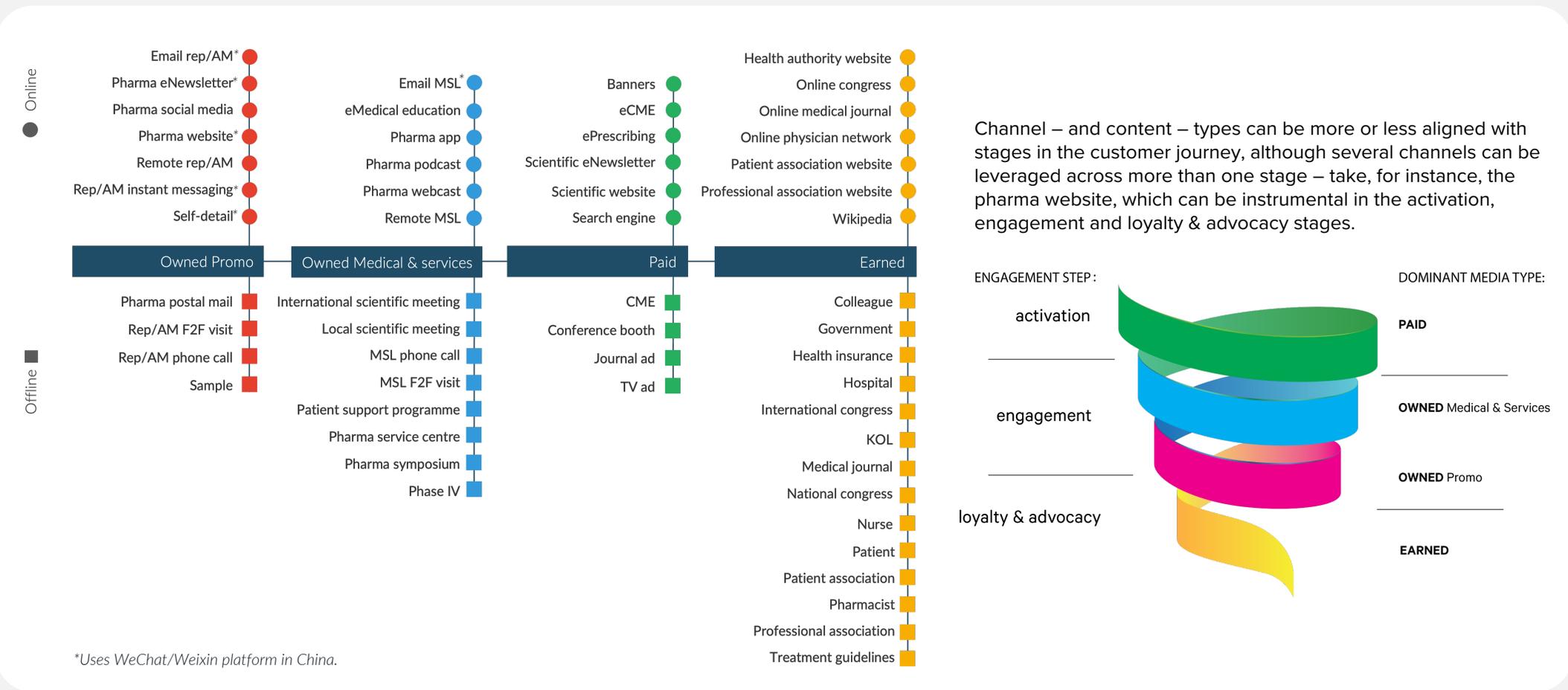
Navigator365™ Core

more information: [precisionaq.com/intl-navigator365-core](https://precisionaq.com/intl-navigator365-core)

# 1. About Navigator365™ Core

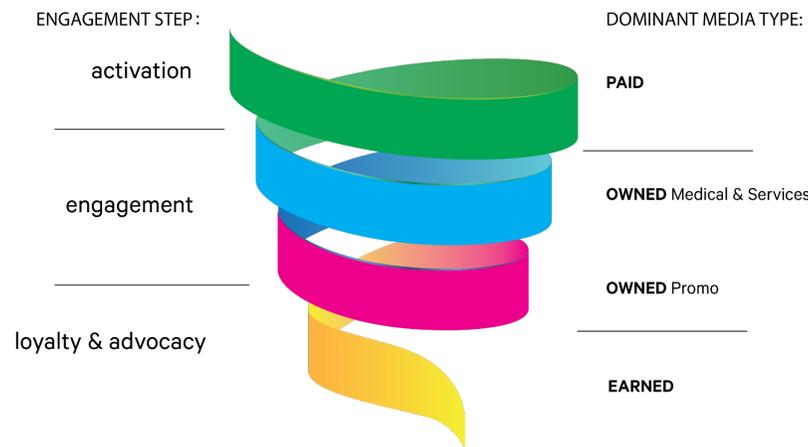
Channels come in many shapes and forms: push-pull, online-offline, social, mobile, etc... Forrester created an insightful framework, where channels are categorised as either owned, paid, or earned. Navigator365™ Core leverages this framework, translates it to the pharma context and adds key offline channels 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:



\*Uses WeChat/Weixin platform in China.

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.

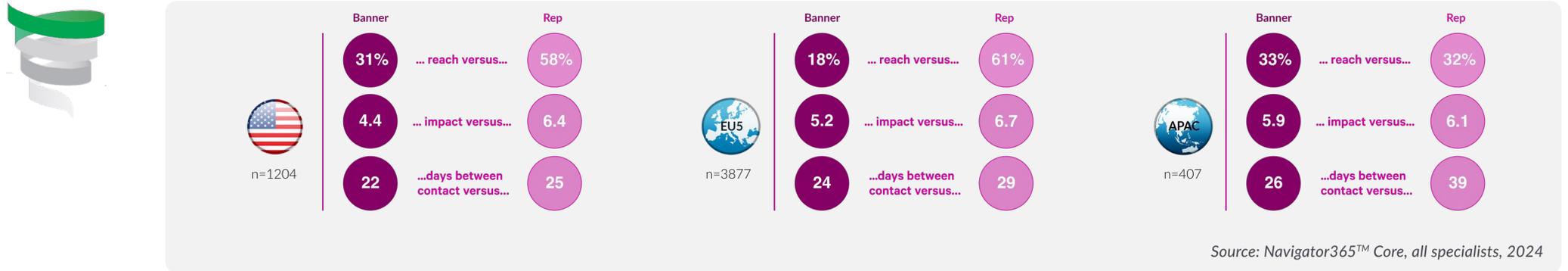


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## 2. Channel metrics

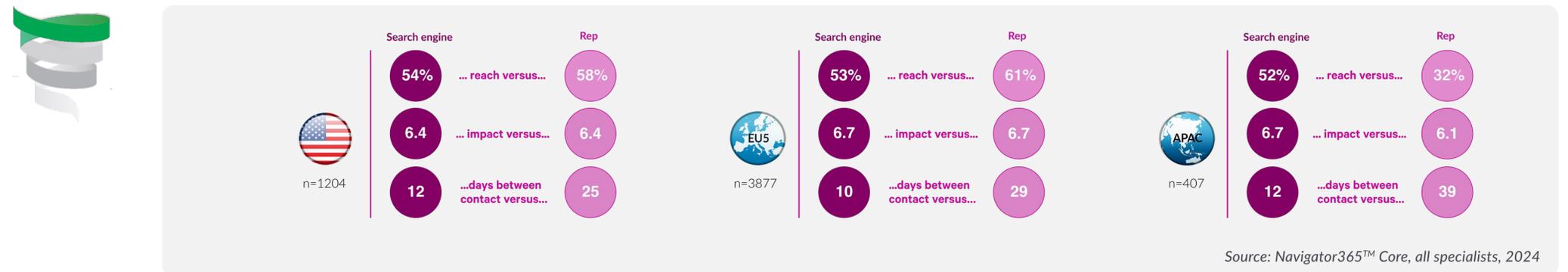
### DISPLAY (BANNER) ADVERTISING

Using sophisticated targeting methods, online 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 lowest among US HCPs – perhaps not surprising considering the sheer volume of biopharmaceutical advertising in this market – while EU5 shows the exact opposite. In contrast, APAC defies this inverse relationship with both high reach and the highest impact among the three regions.



### SEARCH ENGINE MARKETING

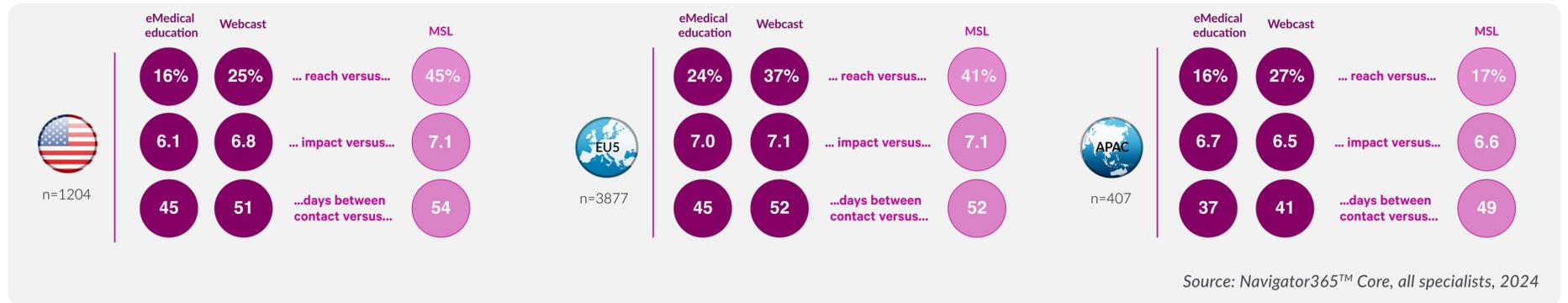
With search engine marketing, you need to make sure you can be found – because if you can't be found, you may just as well not exist! While APAC used to lead in this area, living up to its reputation as a very online market, now reach, impact and frequency are remarkably similar between all three regions.



## 2. Channel metrics

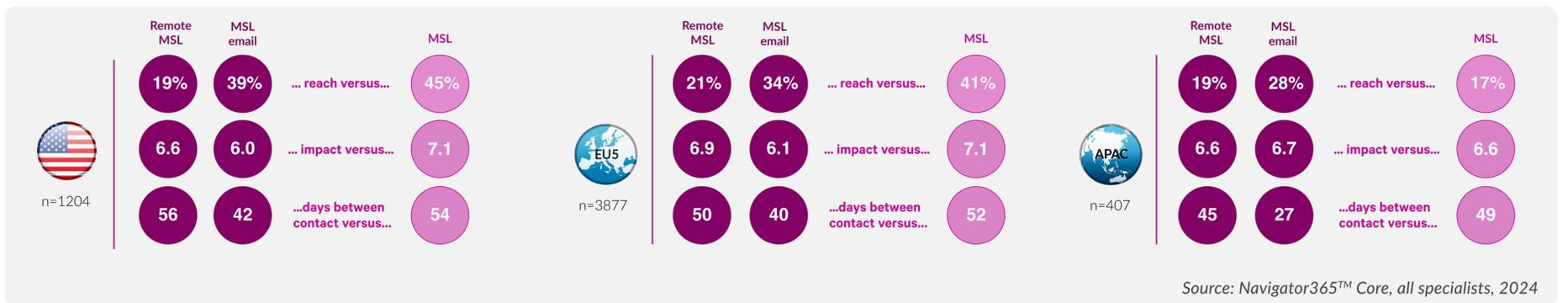
### EMEDICAL

Leading biopharma companies continue to increase their investment in eMedical channels, such as eMedical education and webcasts, resulting in impact scores that, in EU5 and APAC at least, are on a par with face-to-face MSL visits. Our digital divide data shown earlier strongly suggests that many physicians are keen to engage with companies that offer them a strong digital/omnichannel medical experience.



### 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.



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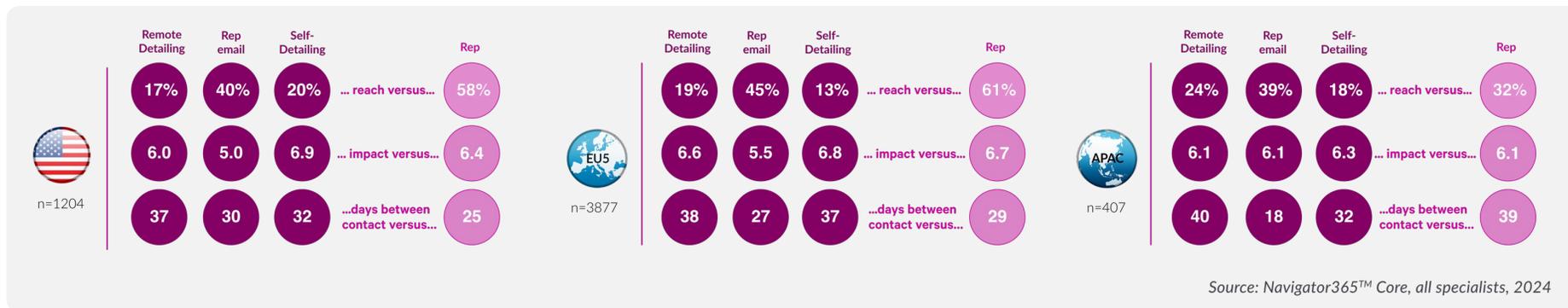
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## 2. Channel metrics

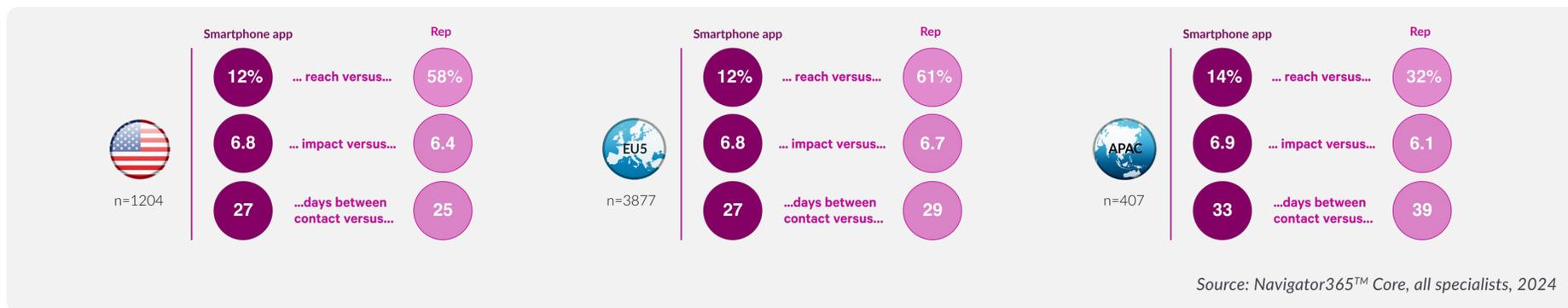
### OMNICHANNEL REP

Omnichannel rep engagement can lead to increased efficiency and effectiveness for biopharma, as well as a superior customer experience. Nevertheless, despite impact scores that are comparable to in-person visits, the reach data show remote detailing has yet to really gain traction (APAC performing slightly better here). In contrast, rep emails show a better reach. Combining rep email with an option to self-detail offers a good alternative to remote or F2F engagement, but this has yet to be fully exploited.



### MOBILE ENGAGEMENT

Surprisingly, fewer than 15% of HCPs are exposed to pharma-owned mobile apps (APAC, renowned as a 'mobile first' region, shows the highest reach, but only just, and with lower frequency). Importantly, for these relatively small but engaged HCP audiences, the impact of this channel is remarkably similar across all three markets – and higher than the rep.



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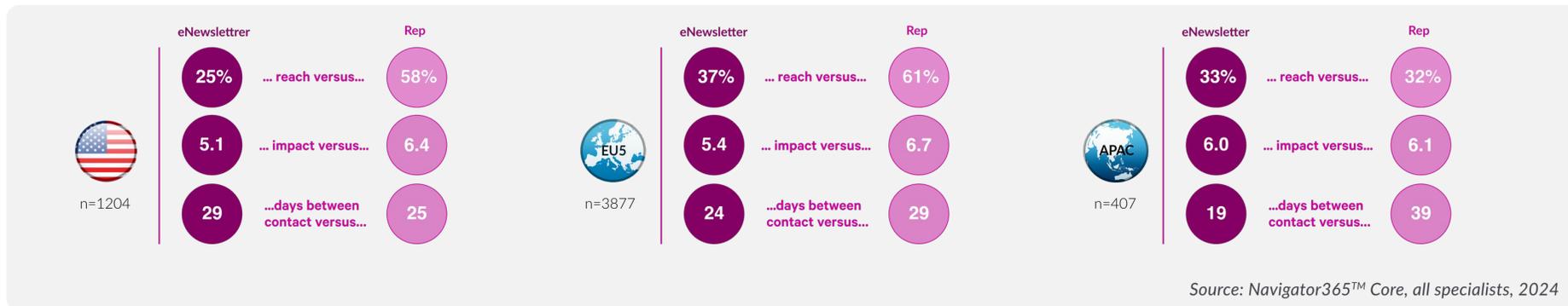
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## 2. Channel metrics

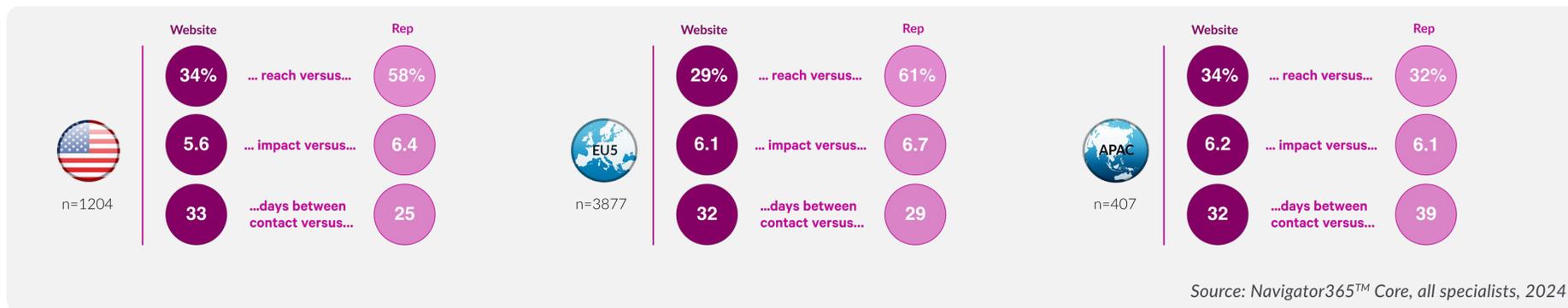
### EMAIL ENGAGEMENT

Email remains an integral 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). Getting the balance right between the different types of email and offline communications is crucial in a truly customer-oriented, omnichannel world – and this is where HCP insights can be invaluable.



### 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. While frequency of interaction with pharma websites is remarkably similar between our three focus regions, it's only APAC where the website performs better than the rep in terms of both reach and impact (note in-person rep access appears significantly lower here).



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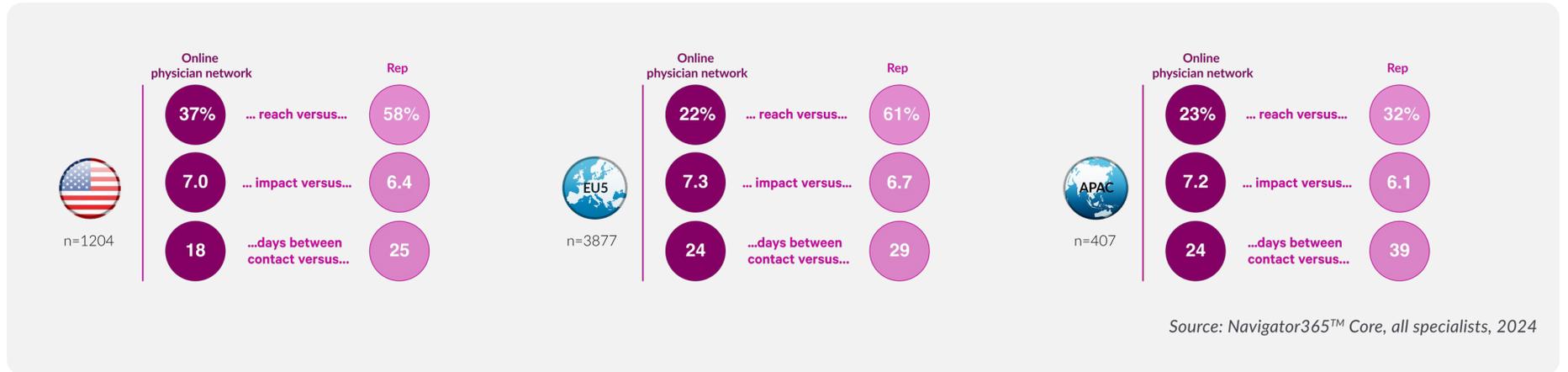
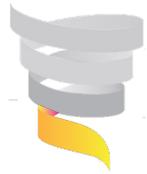
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## 2. Channel metrics

### SOCIAL MEDIA ENGAGEMENT (ONLINE PHYSICIAN NETWORKS)

Like most earned channels, online physician networks carry a lot of influence when it comes to HCPs' clinical decision making, surpassing F2F rep impact across all three markets. Reach is highest in the US, where the interval between interactions is also the shortest.



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## About Navigator365™

The **Navigator365™ platform** is the centrepiece of our proprietary data offering. It provides the insights, evidence and tools needed to plan, execute, measure and amplify 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**



### 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 optimisation decisions versus your key competitors - at the brand level.



### 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 60 million+ datapoints are utilised by our consultants to substantiate their strategic recommendations, and are accessible via the Navigator365 self-service platform through highly interactive tools and reports.



### Maturometer™

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



[www.precisionaq.com/Navigator365](http://www.precisionaq.com/Navigator365)



### Navigator365™ Payer

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



### Navigator365™ Matrix

Today's HCPs often look online for fresh ideas and reliable opinions. **Navigator365™ Matrix** is a unique tool that helps you identify and activate the right digital opinion leaders (DOLs) to advance your omnichannel brand strategy.



### 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.



## About this report

Armed with the latest intelligence from Navigator365™ and Maturometer™, this year's report is designed to guide you in building stronger, more impactful omnichannel engagement strategies that truly resonate with HCPs and set your organisation apart.



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-  Navigator365™ Cx Benchmark
-  Navigator365™ Payer
-  Maturometer™

### DATASETS BY REGION



US  
United States



EU5  
France  
Germany  
Italy  
Spain  
UK



APAC  
China  
Japan  
Philippines



EU  
EU5 + Albania, Austria,  
Belgium, Bulgaria, Croatia,  
Czech Republic, Denmark,  
Greece, Hungary, Malta,  
Netherlands, Poland,  
Portugal, Romania, Slovenia,  
Sweden, Switzerland



# We'd love to hear from you!



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## Let's connect

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

[Contact us](#)

