

Omnichannel transformation:  
Where's the industry at?

# Maturometer™ 2024

WEBINAR #5 – TUESDAY 17/09



PRECISION AQ™

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# Your hosts for today



**PAULINE SCHOLLER**

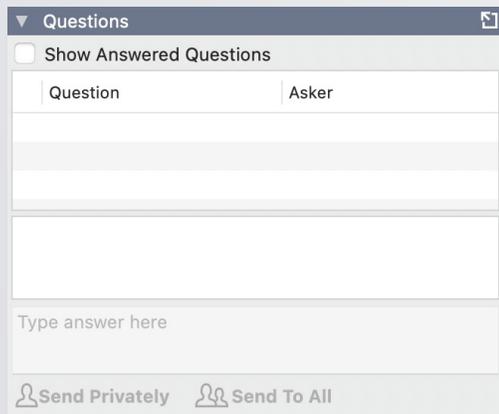


**SANDER GEYSEN**



# Ground rules

- This webinar will take around 40 minutes
- You can submit questions at any time via the “Questions” box. Questions will be summarized and addressed after the webinar.



Question	Asker

Type answer here

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

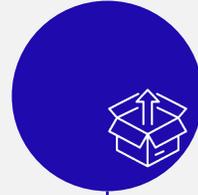




**Respondent  
overview**



**The industry's  
maturity level**



**Drivers of industry  
maturity level**



**What does the  
future hold**





**Respondent  
overview**



**The industry's  
maturity level**



**Drivers of industry  
maturity level**

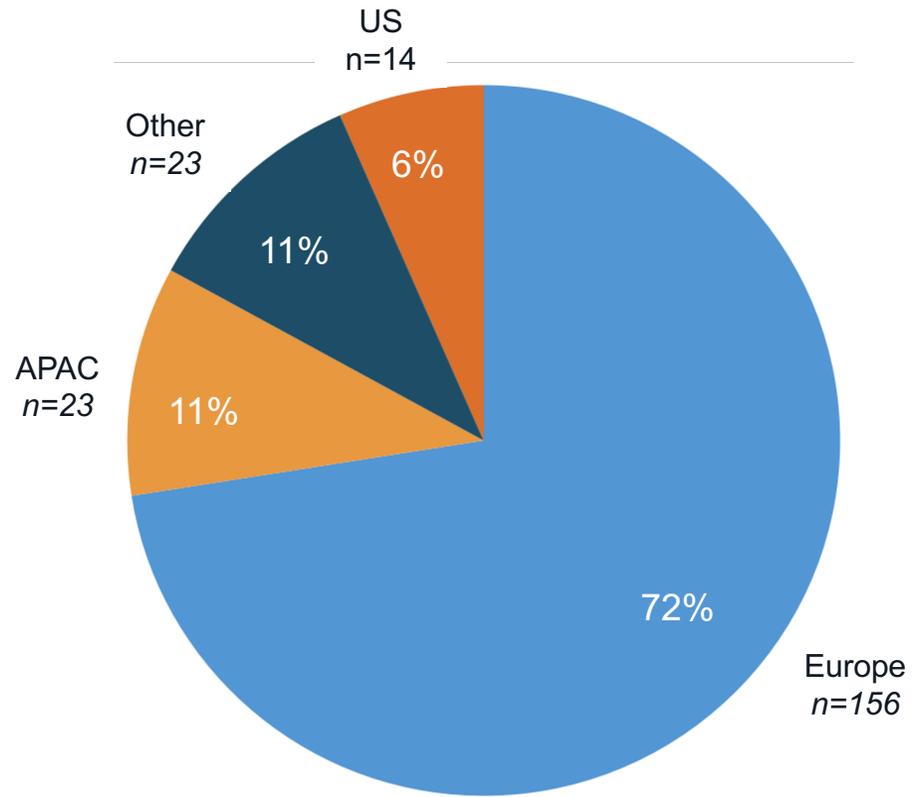


**What does the  
future hold**

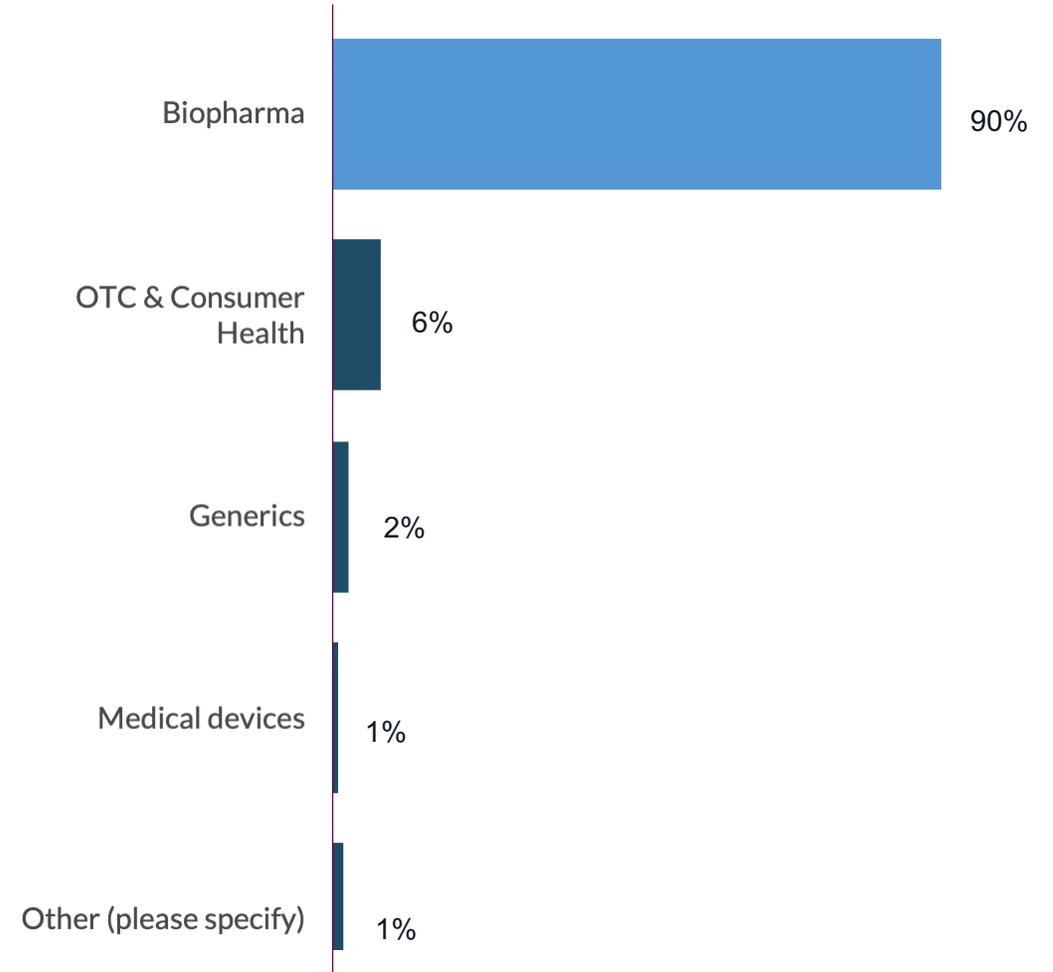


# Profile of respondents

## Regional split of respondents

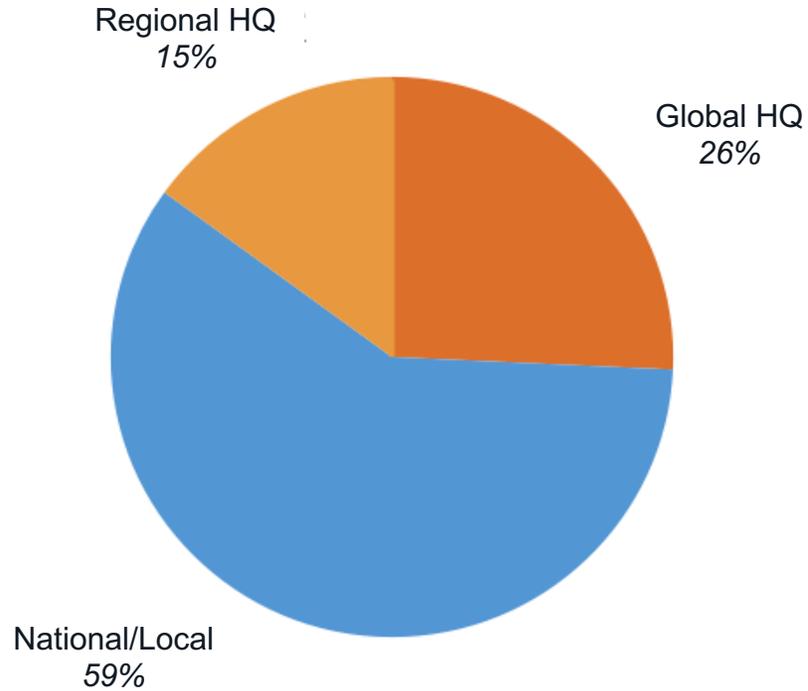


## Industry representation

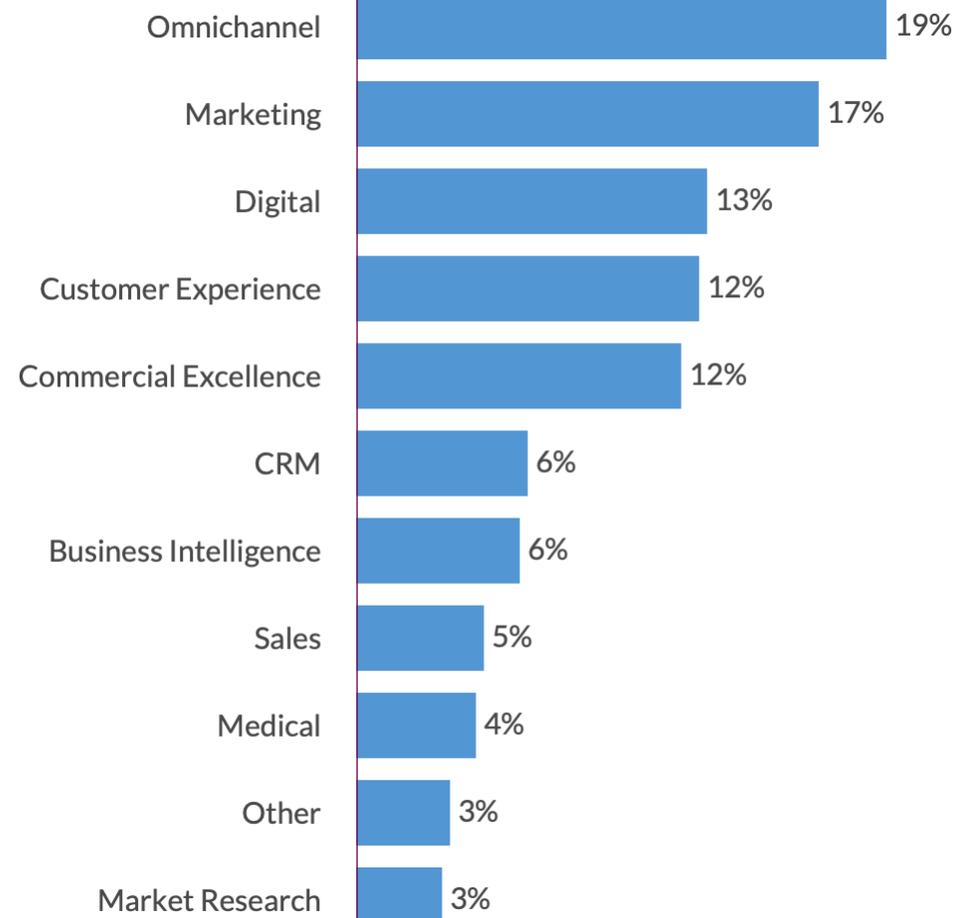


# Profile of respondents

## Geographic scope



## Function representation





**The following report is focused on  
European respondents  
active in Biopharma**





Respondent  
overview



The industry's  
maturity level



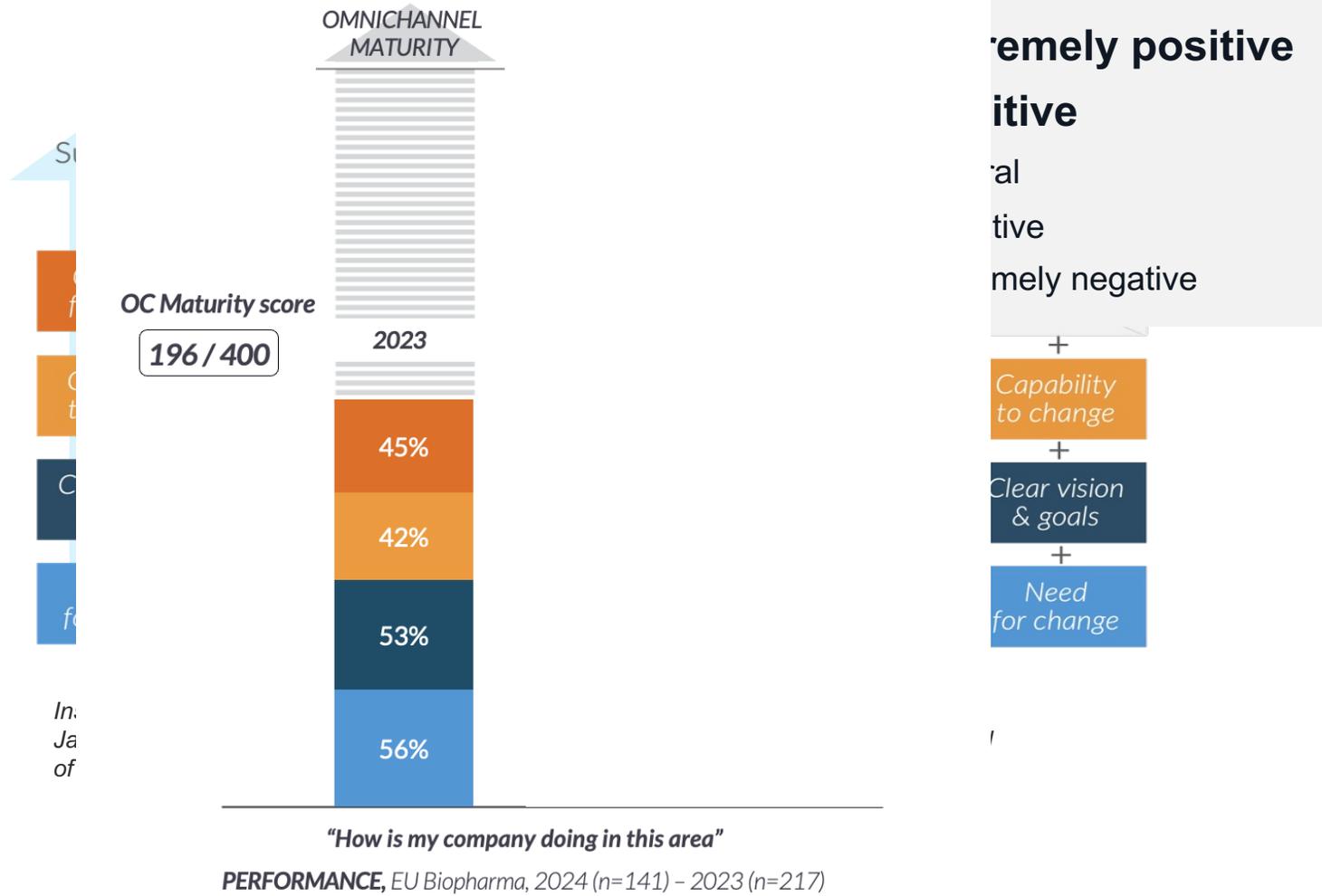
Drivers of industry  
maturity level



What does the  
future hold



# The OC Maturity Index

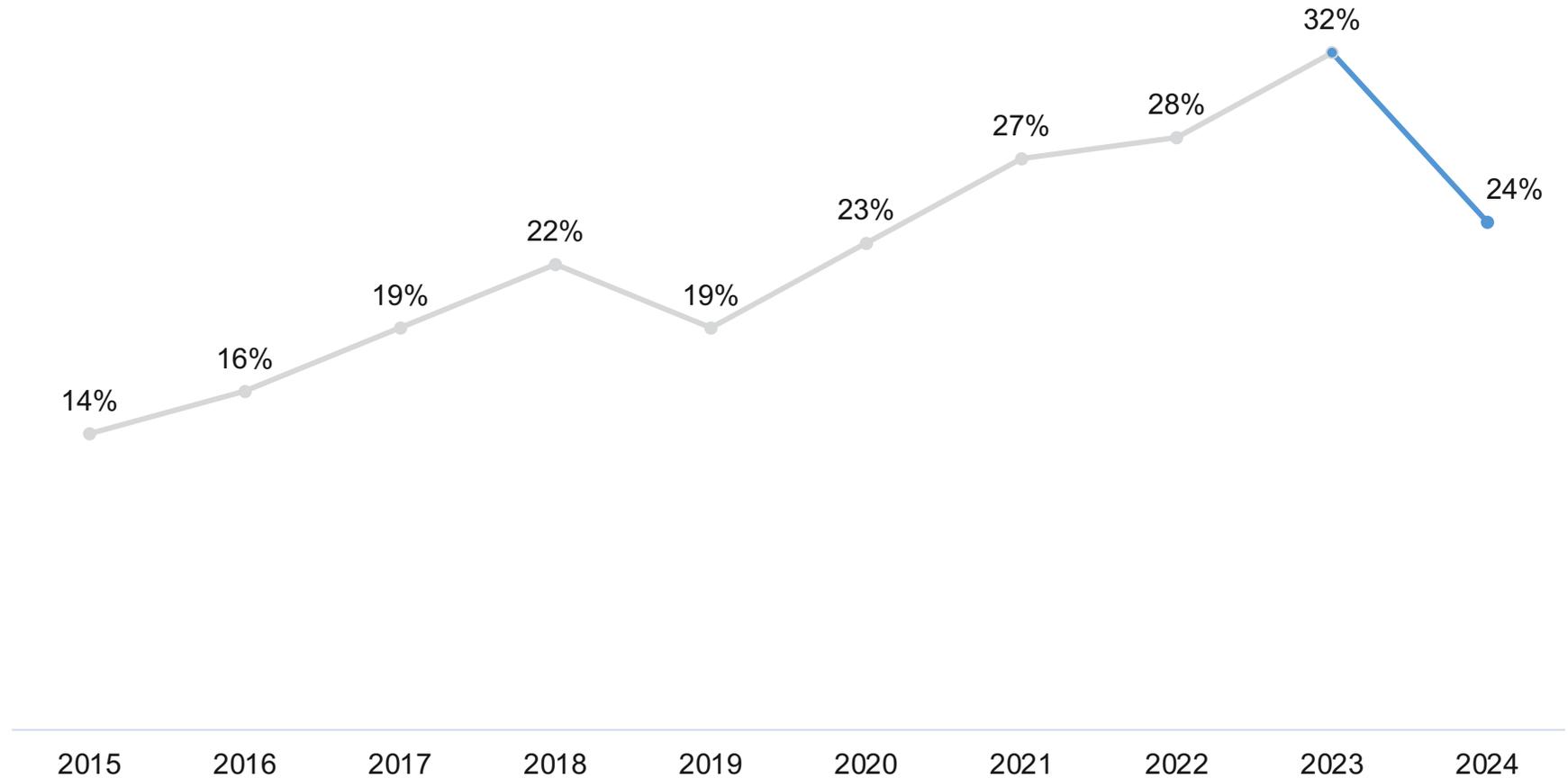


? Which percentage of your budget is allocated to digital initiatives this year?

Digital budgets have declined, returning to 2020 levels.

What could be the reason for this?

- ROI questions
- Fully satisfied with current activities
- Internal disconnect between teams



Maturometer™ 2024, EU Biopharma, n=96

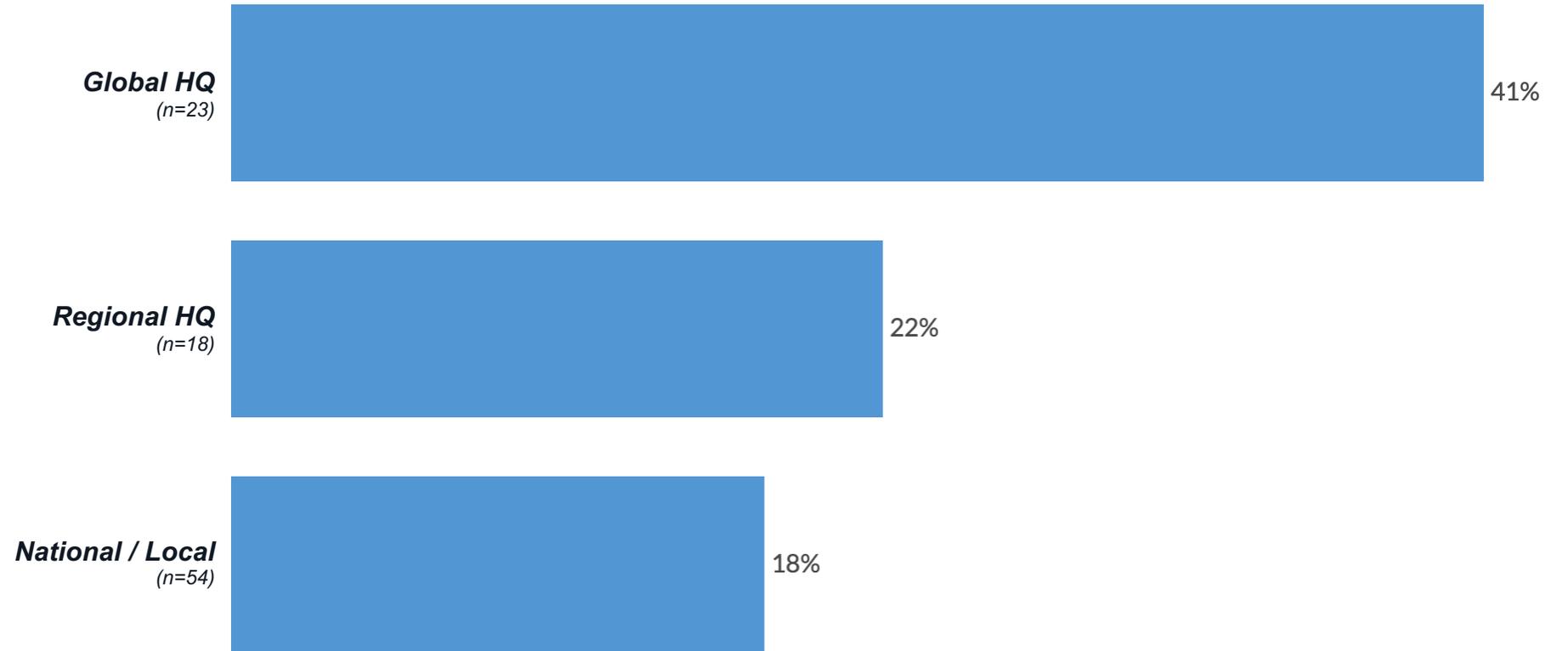


## POLL: Is the percentage of budget allocated to digital similar for both global and local teams?

- Yes, both global and local teams allocate a **similar portion** of their budget to digital.
- No, **global teams allocate a larger portion** of their budget to digital.
- No, **local teams allocate a larger portion** of their budget to digital.



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

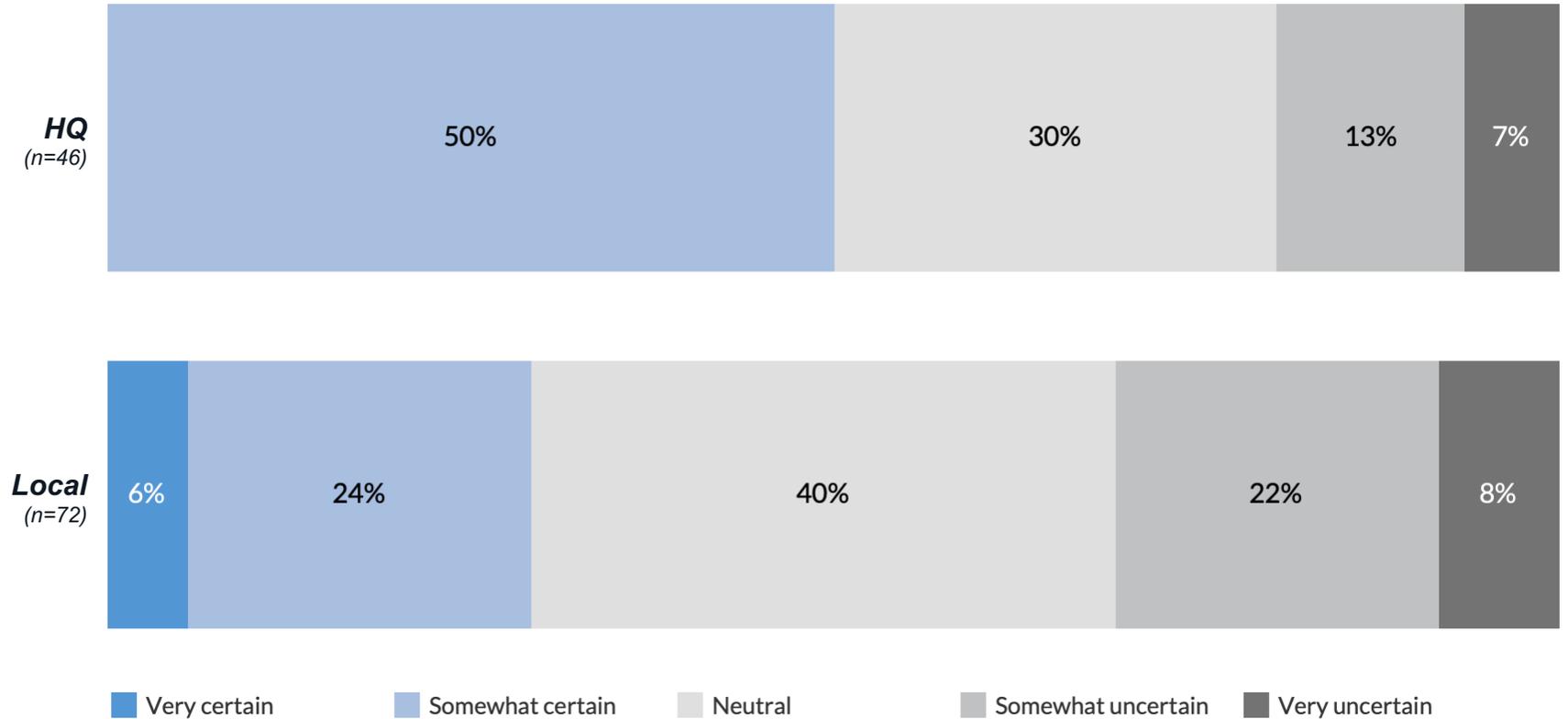


**Global HQ allocates more than twice the percentage of their budget to digital vs local teams.**



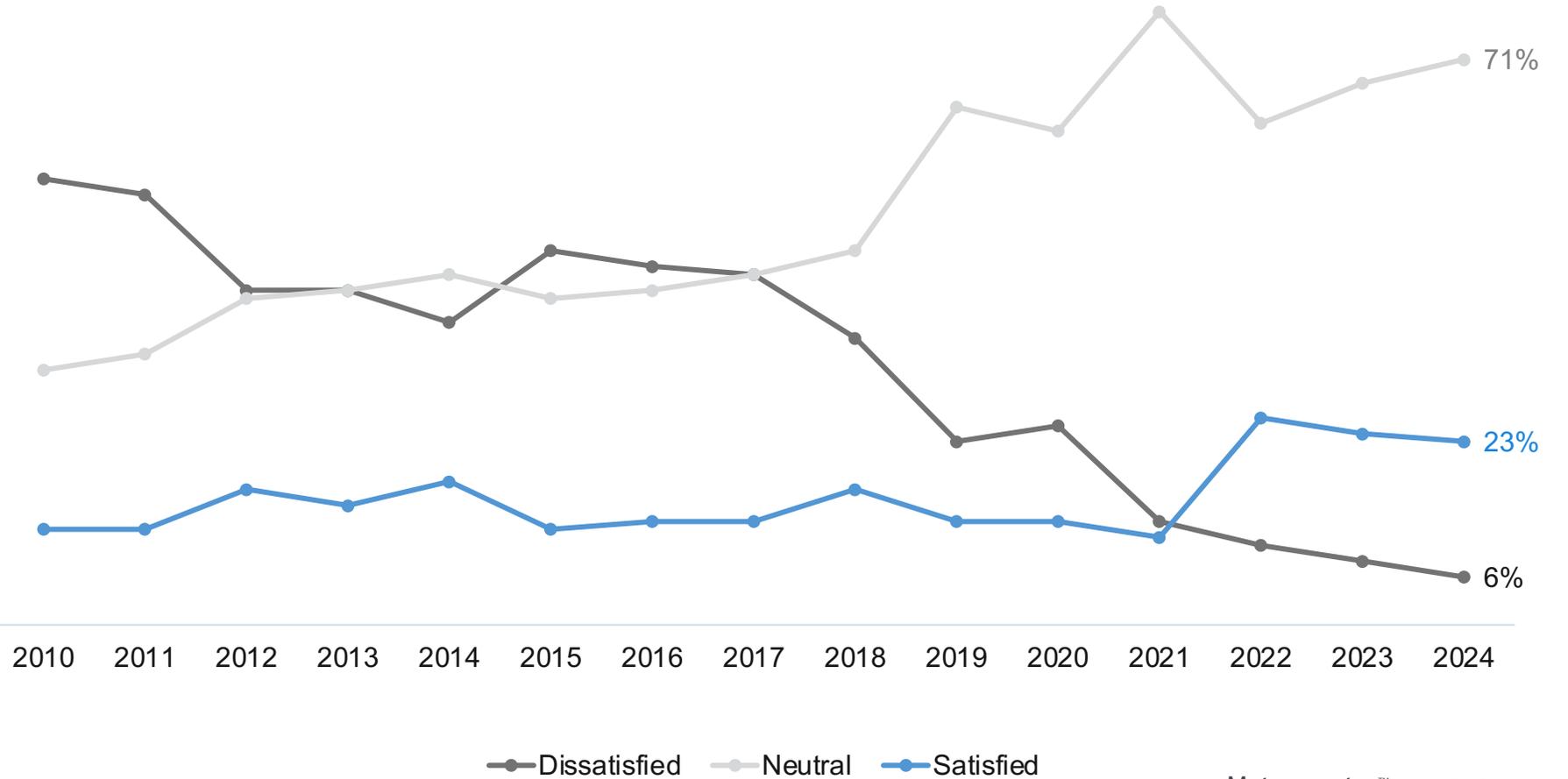
How certain are you that your omnichannel investments and measurements are optimal?

HQ decision-makers are more confident in their omnichannel investments than local staff.



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

Though few are dissatisfied, most respondents are neutral (not satisfied) with omnichannel efforts.



Maturometer™ 2024, EU Biopharma n=141





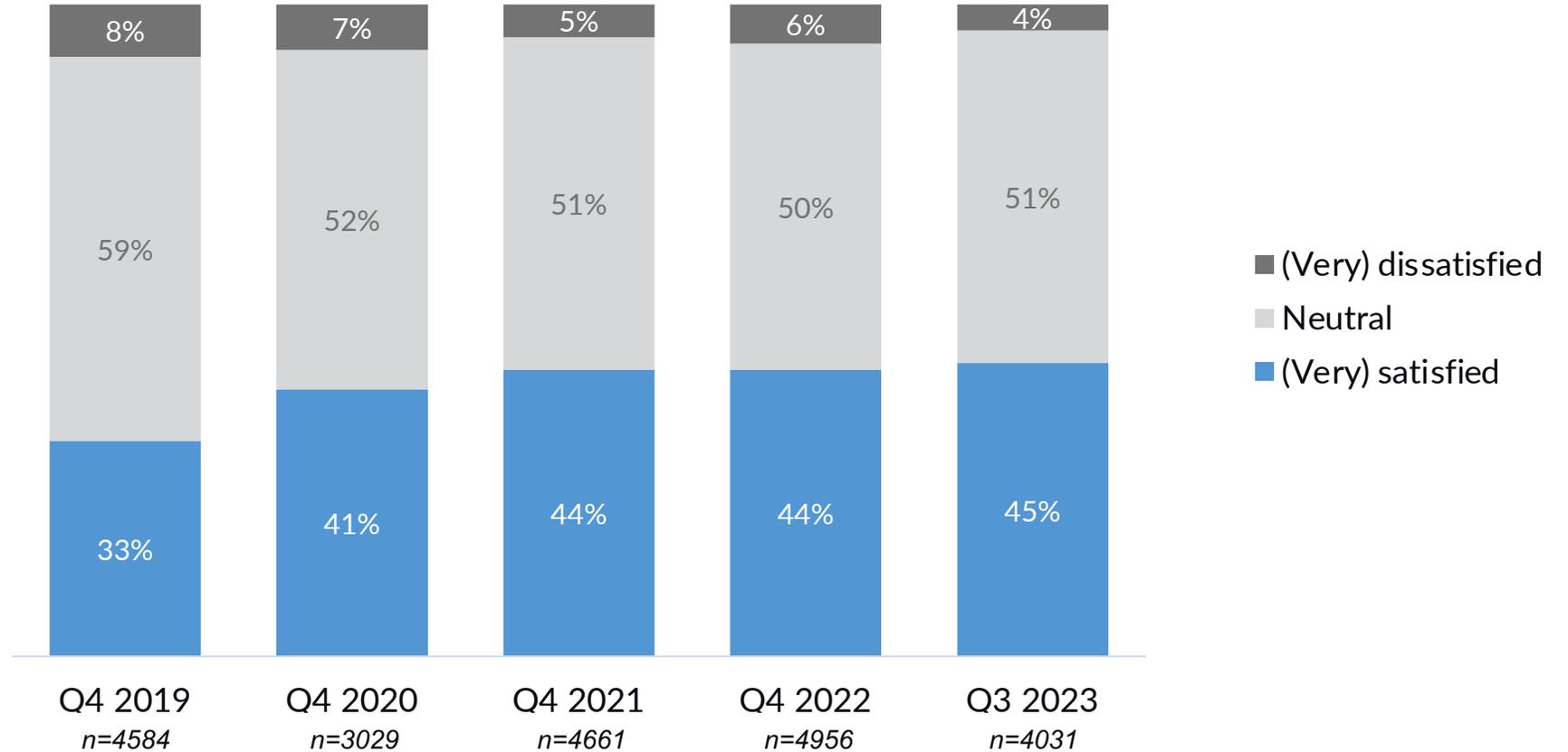
What is the perception of HCPs?



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

HCP satisfaction with omnichannel has remained stable for years now.

Will we see a change in the 2024 results coming out end of September?



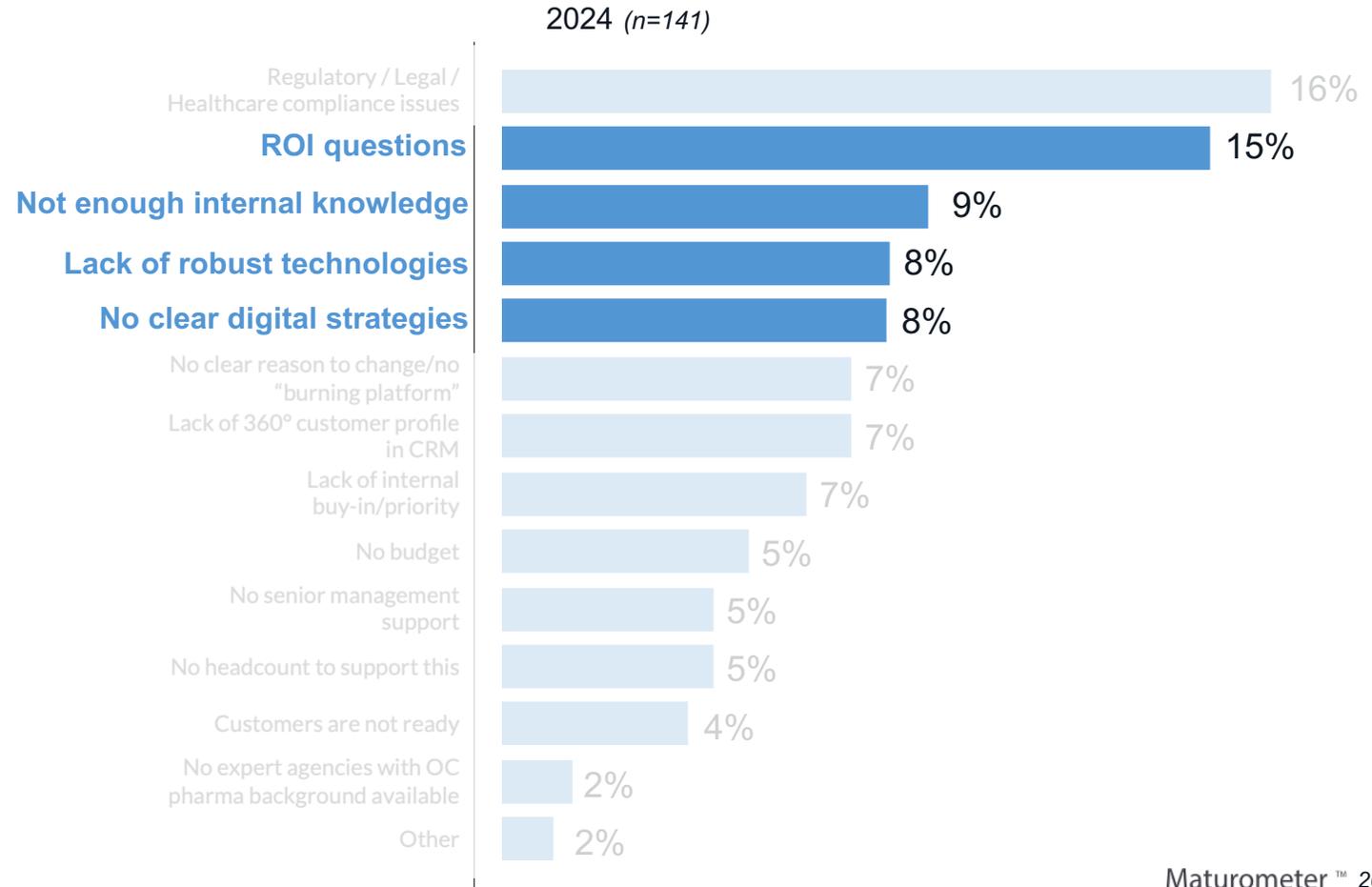
Source: Navigator365™ Core 2019-2023



**?** *What are potential bottlenecks for digital in your organization?*

**Key manageable barriers for omnichannel in the industry today are:**

- **ROI questions**
- **Internal knowledge gaps**
- **Lack of technology**
- **Clear strategies**

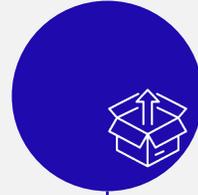




Respondent  
overview



The industry's  
maturity level



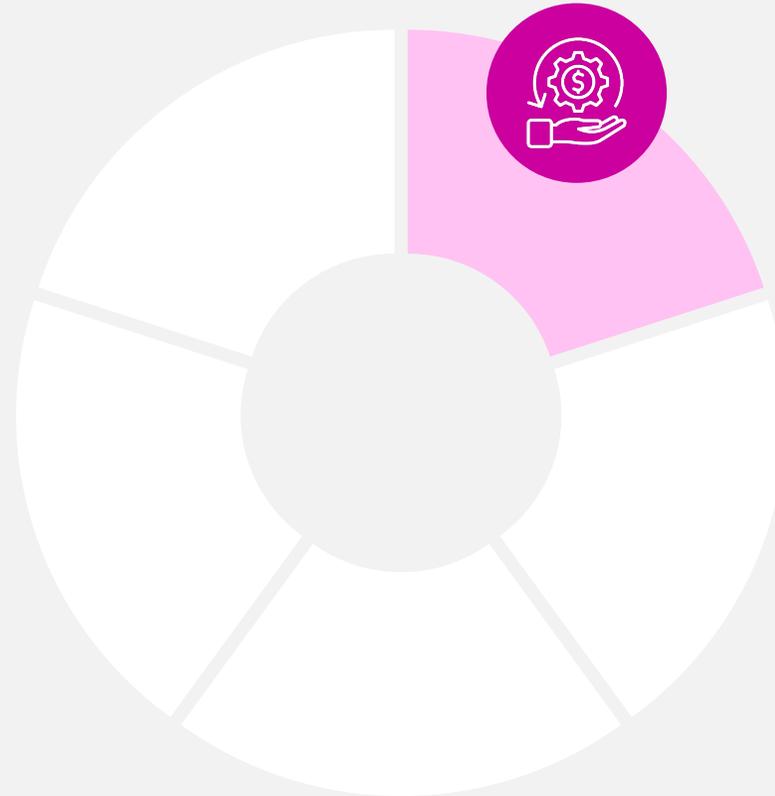
Drivers of industry  
maturity level



What does the  
future hold

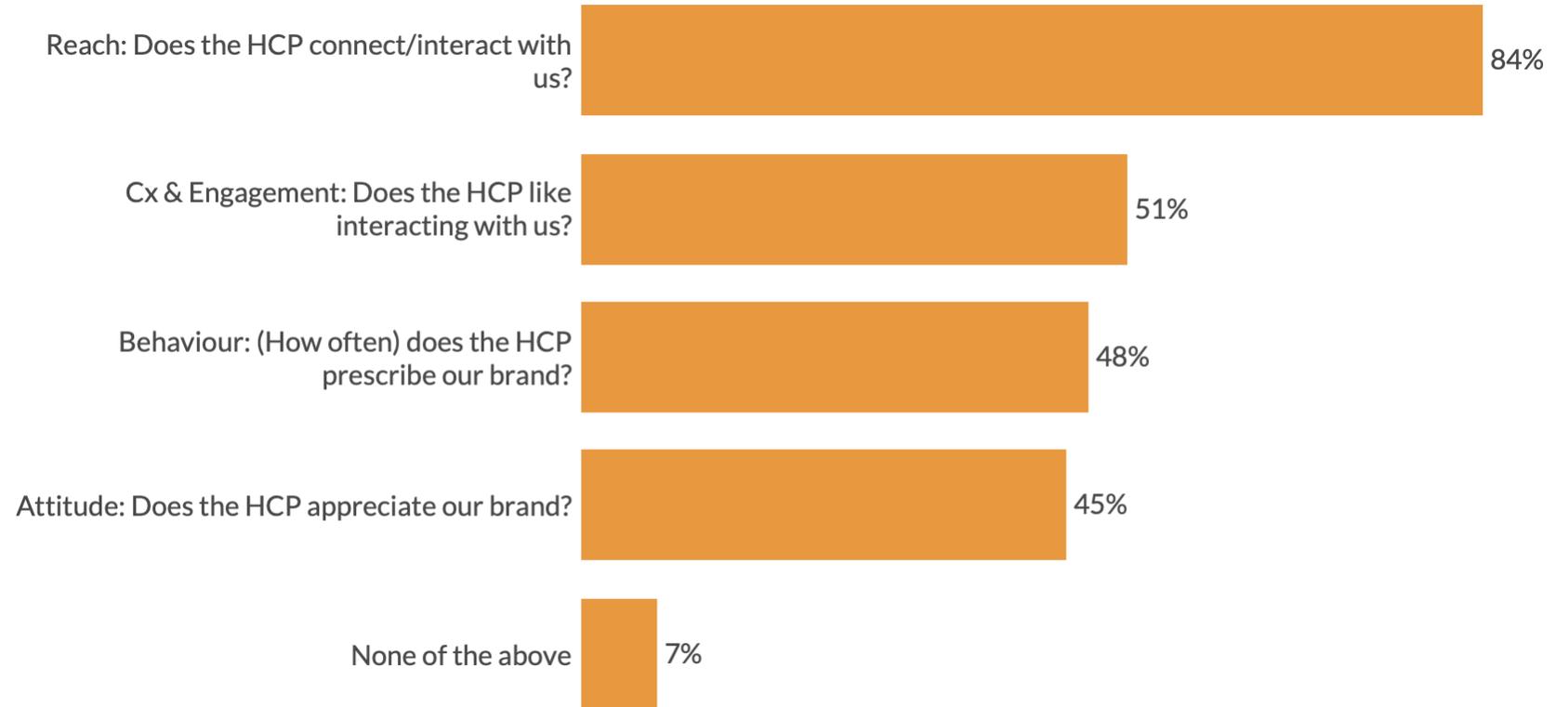


# 1. Unanswered ROI questions



**Pharma is strongly dependent on reach KPIs, and misses out on connecting those with conversion KPIs (attitude/behaviour) to measure true ROI.**

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

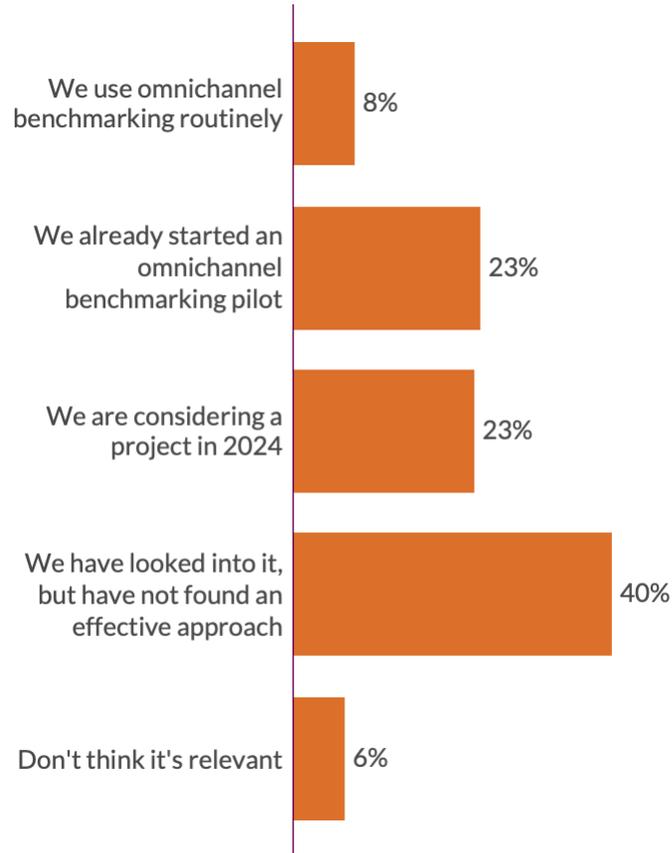


Maturometer™ 2024, EU Biopharma, n=141



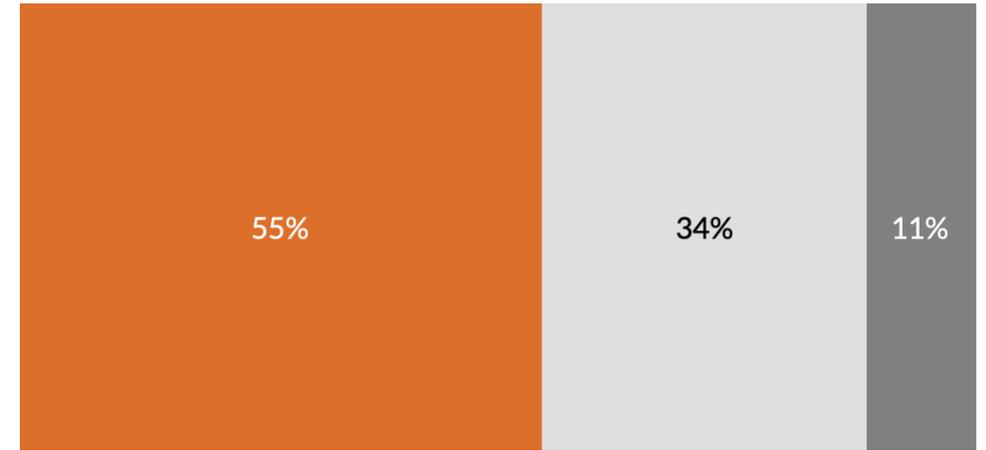
**Few are benchmarking today, and satisfaction with those that do is low.**

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



Maturometer™ 2024, EU Biopharma, n=141

*How satisfied are you with your current omnichannel benchmarking activities?*



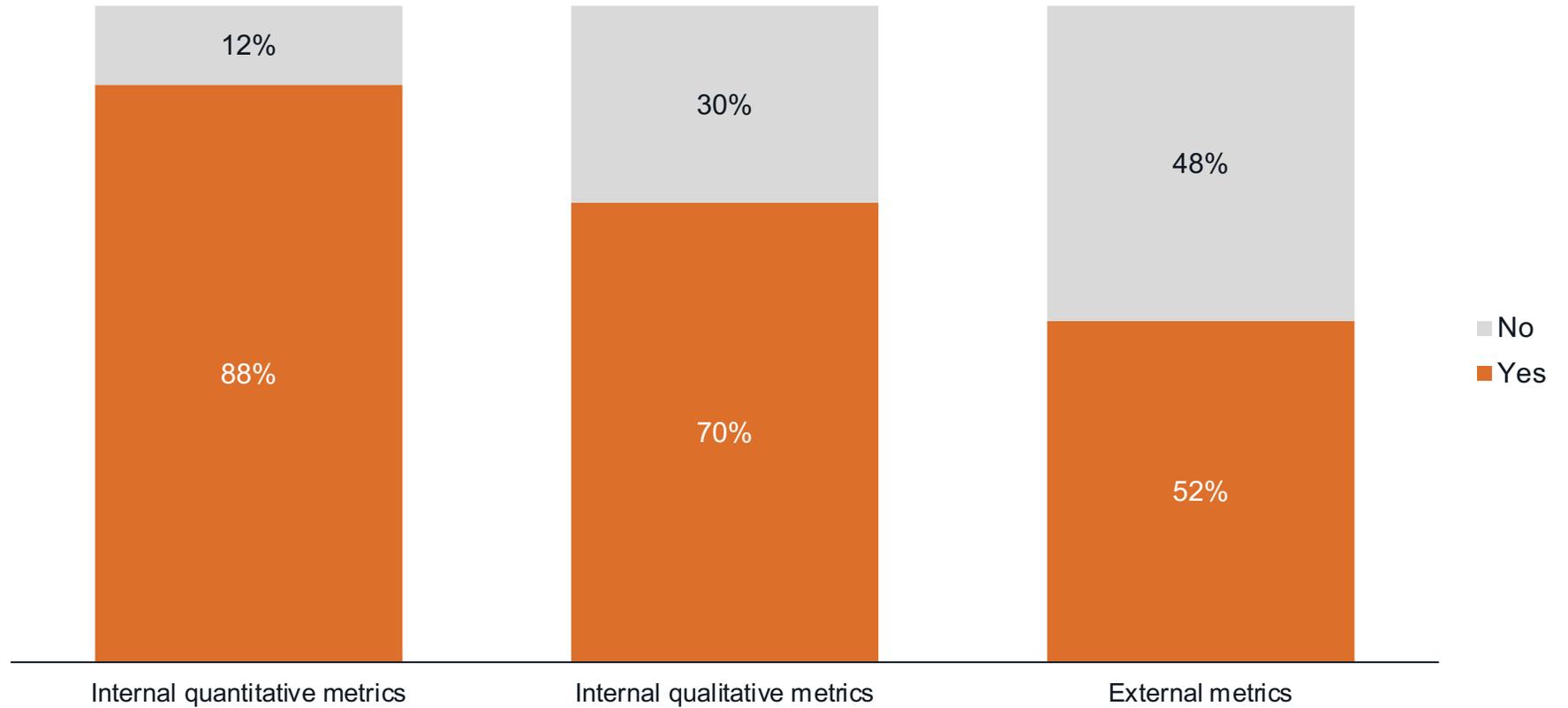
■ Satisfied    ■ Neutral    ■ Dissatisfied

Maturometer™ 2024, EU Biopharma, n=44



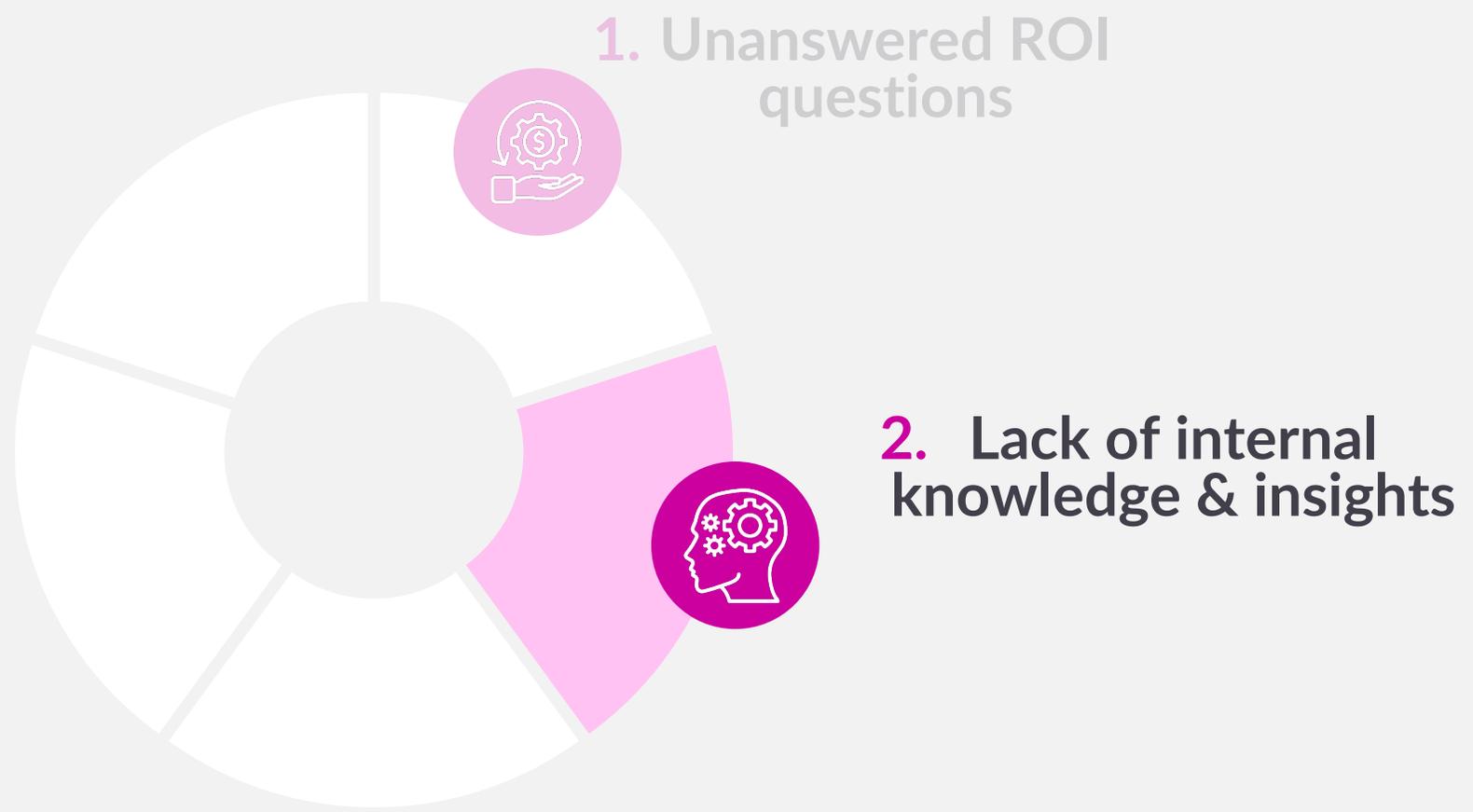
**Benchmarking satisfaction is low due to focus on internal metrics.**

*Which omnichannel benchmarking parameters are you considering?*



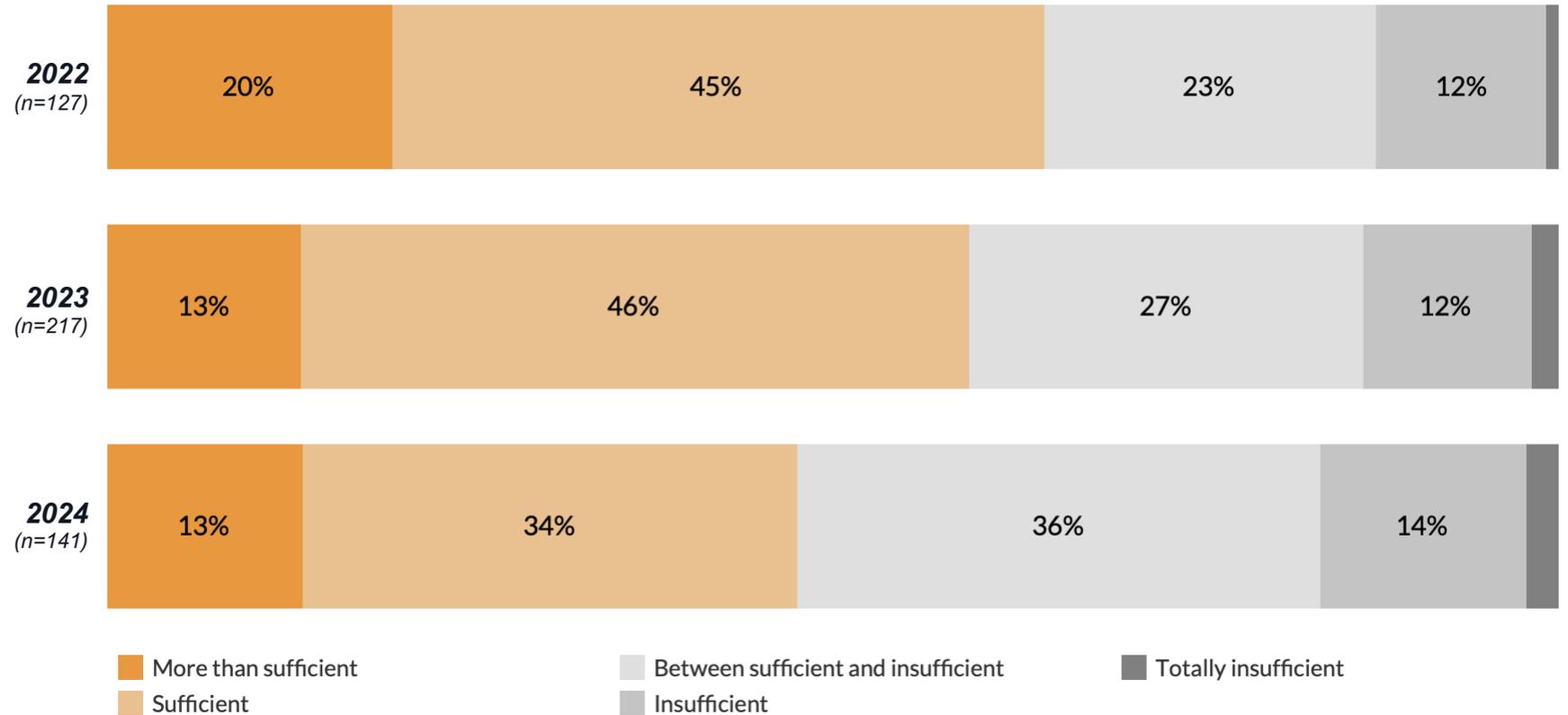
Maturometer™ 2024, EU Biopharma, n=141





Digital knowledge levels are going down for a third year in a row.

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



Maturometer™ 2022 - 2024, EU Biopharma

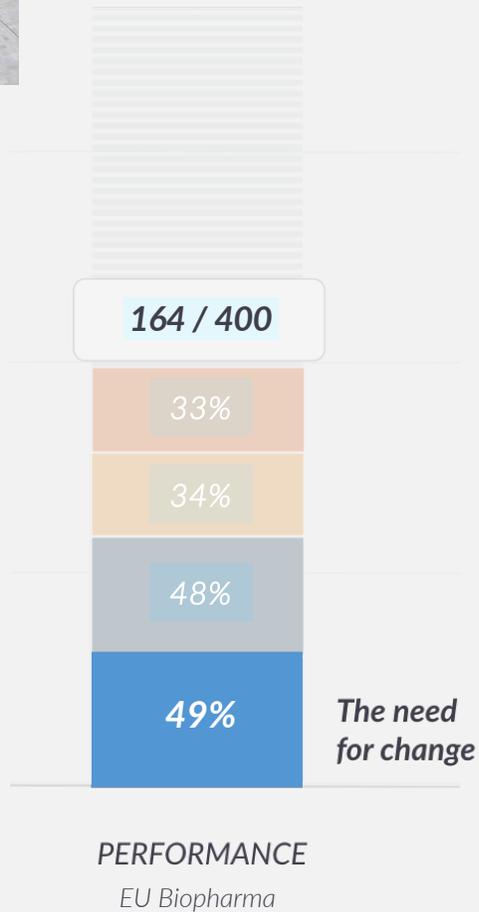


# Maturometer 2024

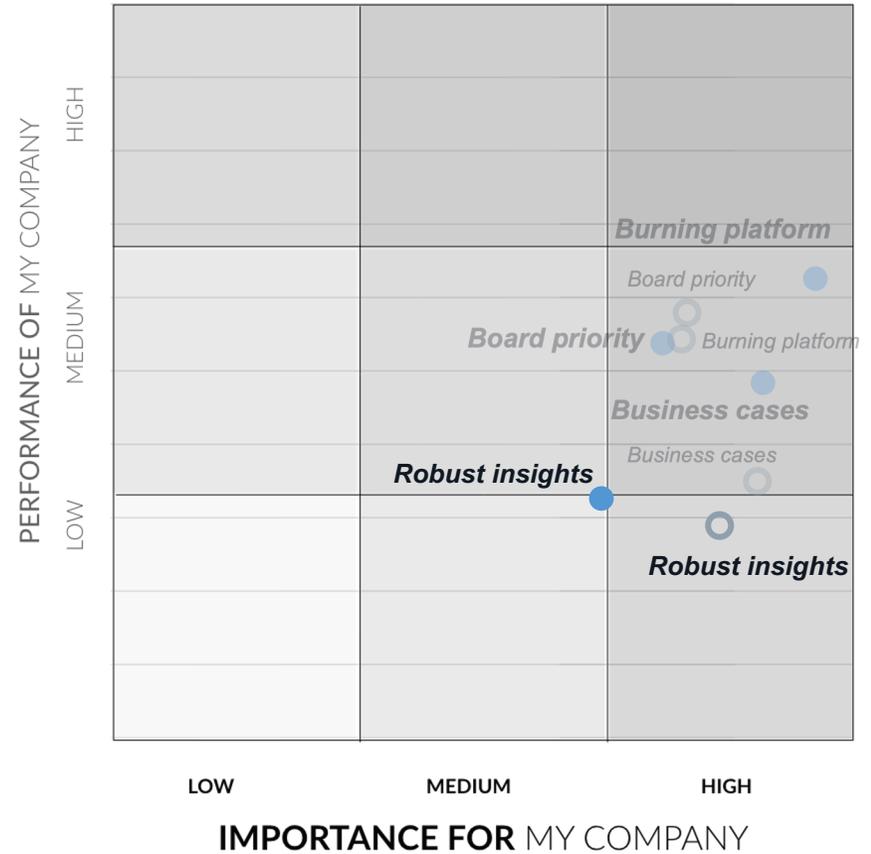


In a context of low “internal knowledge”, it is expected insights are gathered externally.

Despite confirming the importance of such insights, the industry is (surprisingly) underleveraging customer insights.



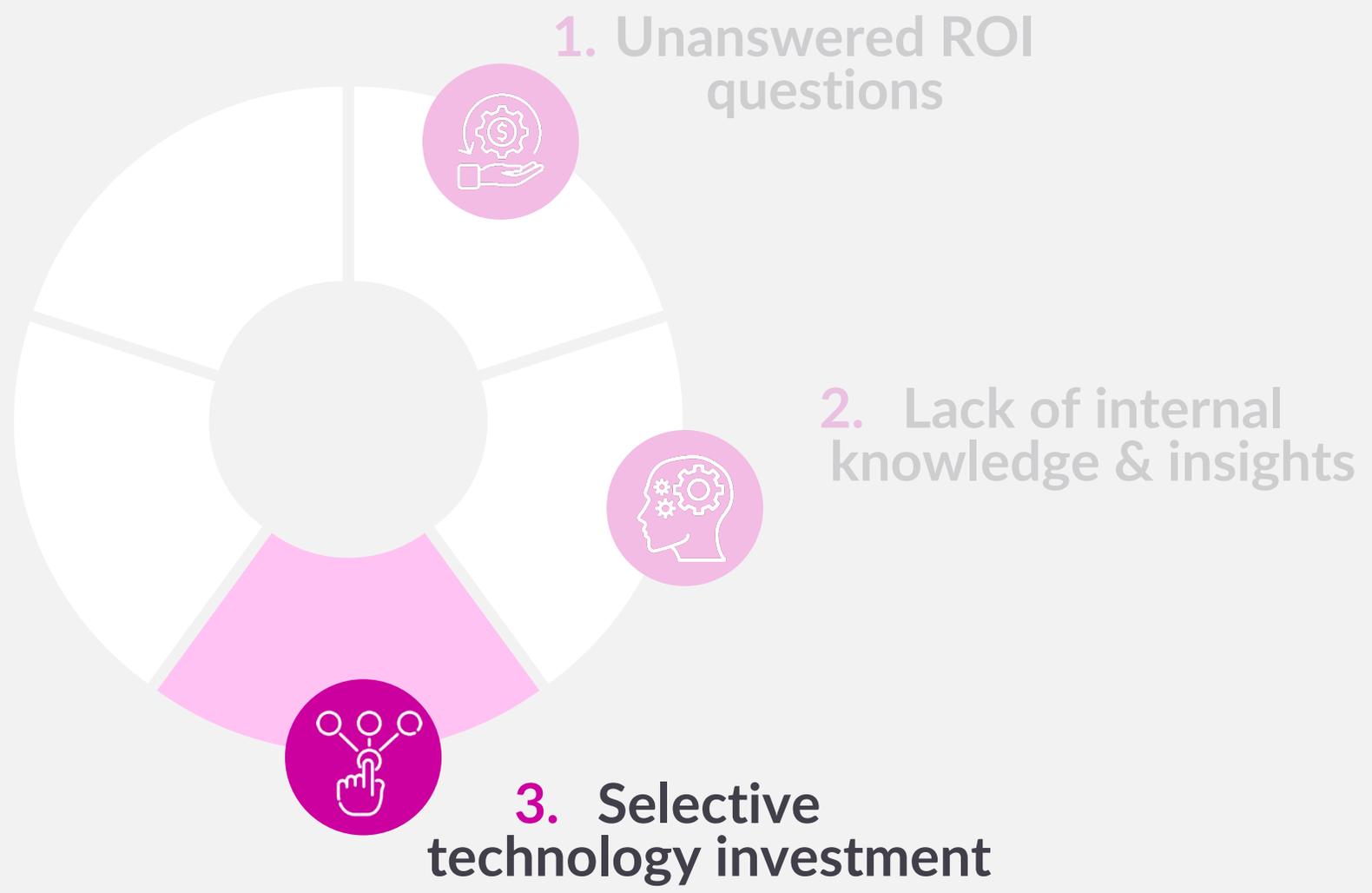
HOW DO YOU ASSESS THE RELATIVE IMPORTANCE OF THESE ‘NEED FOR CHANGE’ DRIVERS?



● HQ  
○ Local

HQ EU Biopharma - n=57  
Local EU Biopharma - n=83

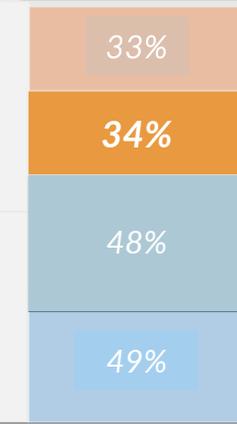




# Maturometer 2024



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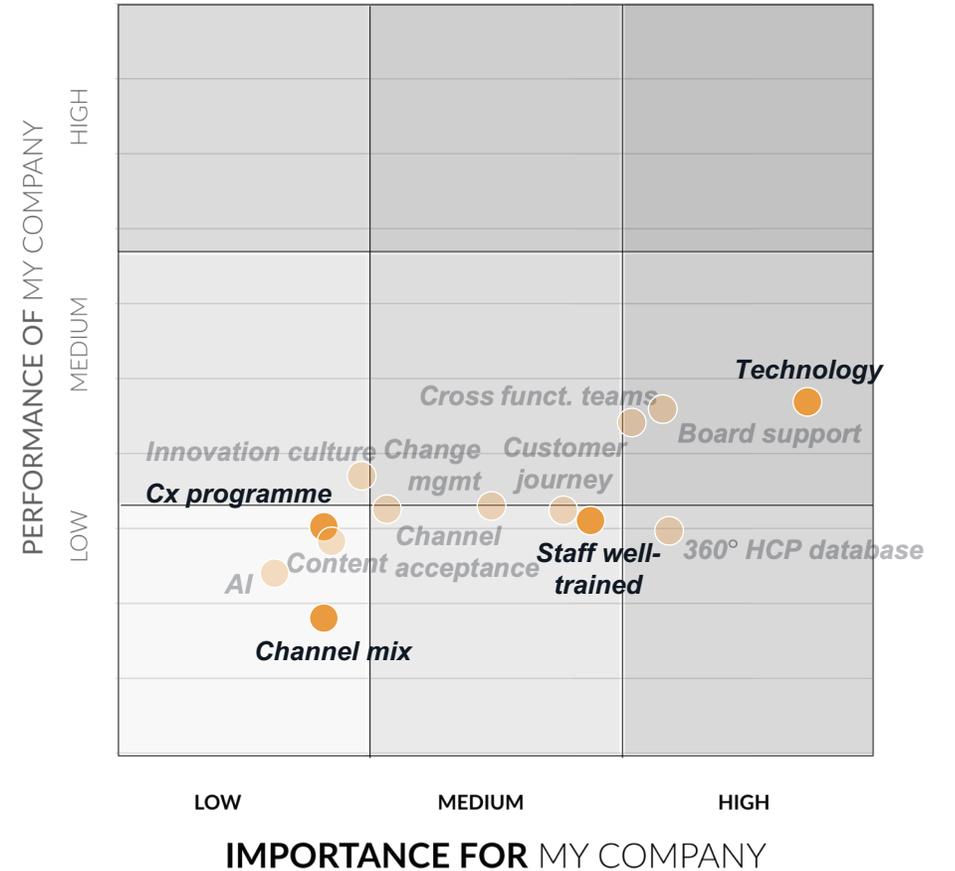


Capability to change

PERFORMANCE  
EU Biopharma

Biopharma continues to focus on technology while seemingly neglecting some of the basics, such as channel mix, customer experience, and training.

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

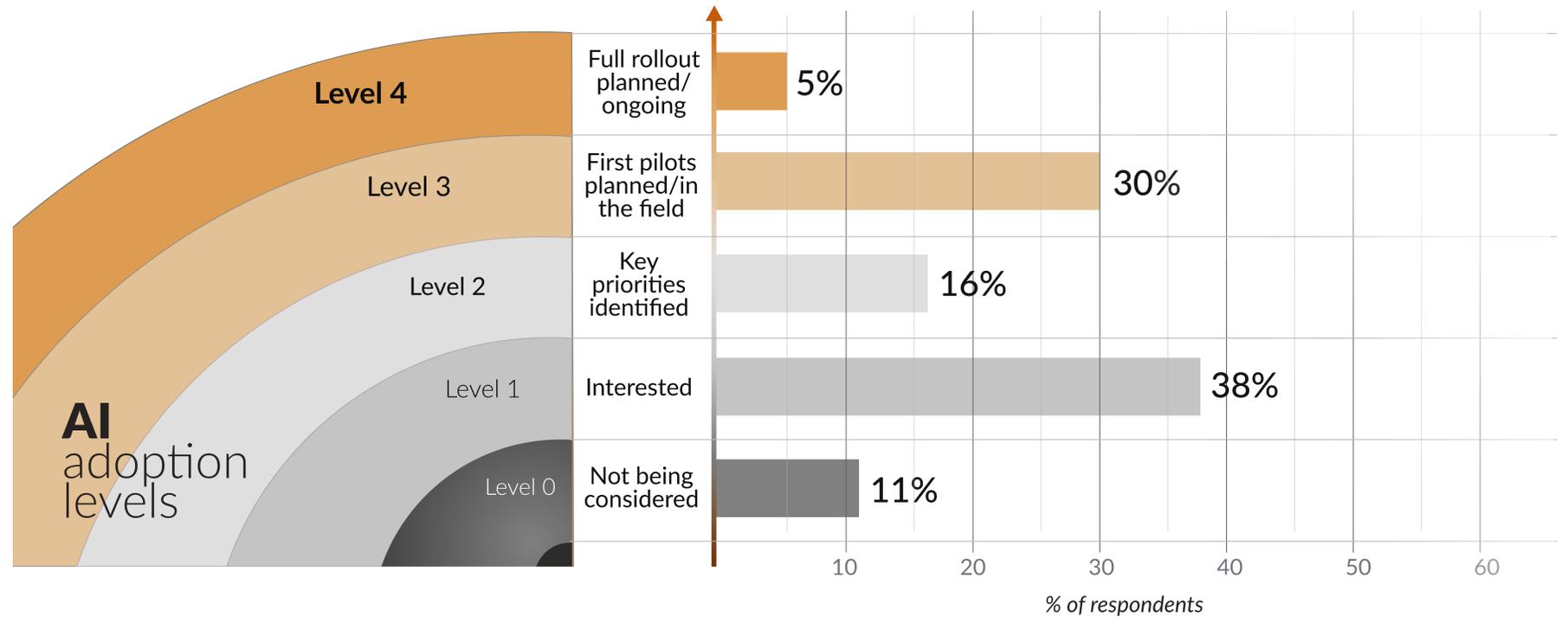


Maturometer™ 2024, EU Biopharma n=141



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

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

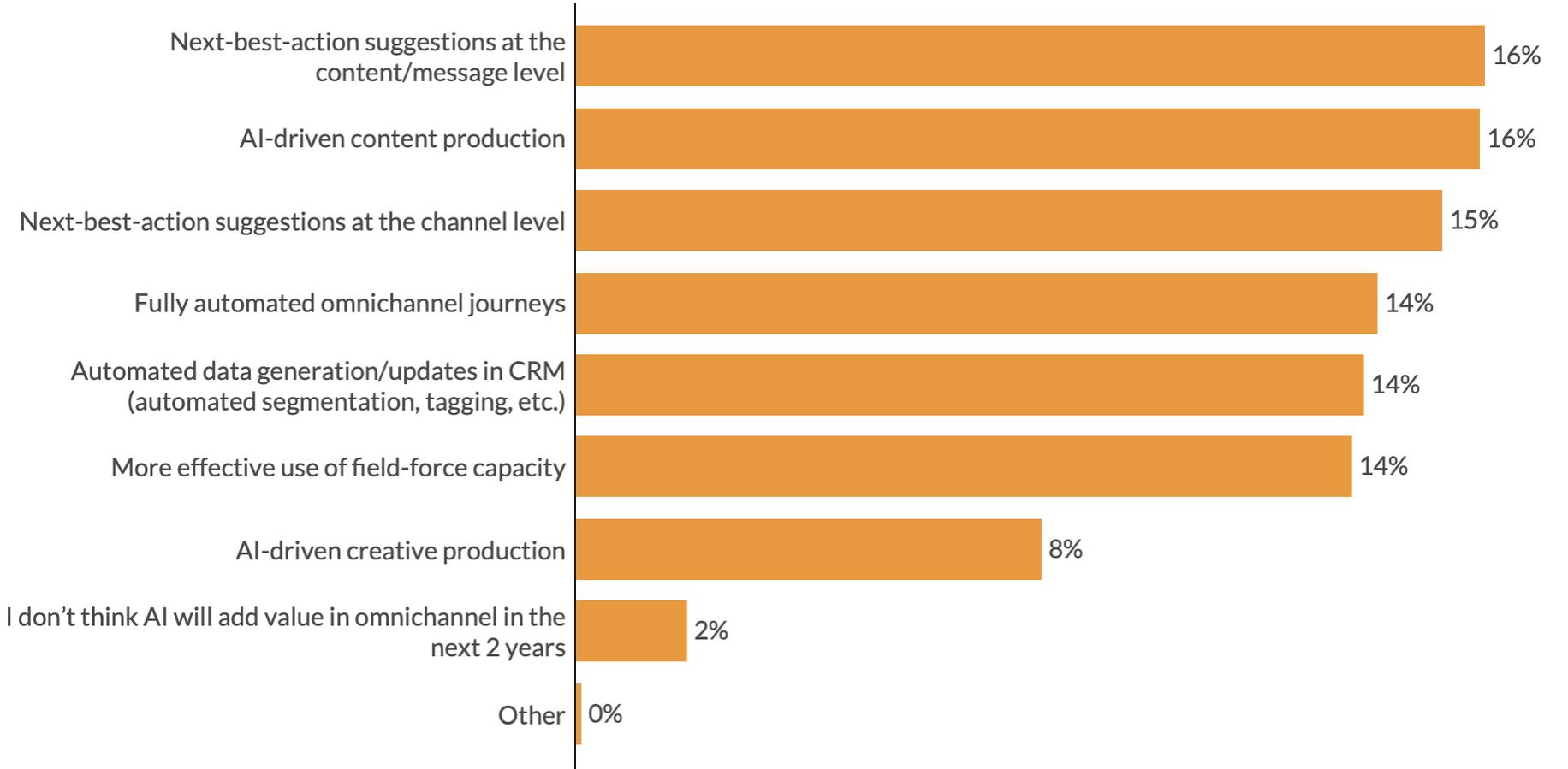


Maturometer™ 2024, EU Biopharma, n=141



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

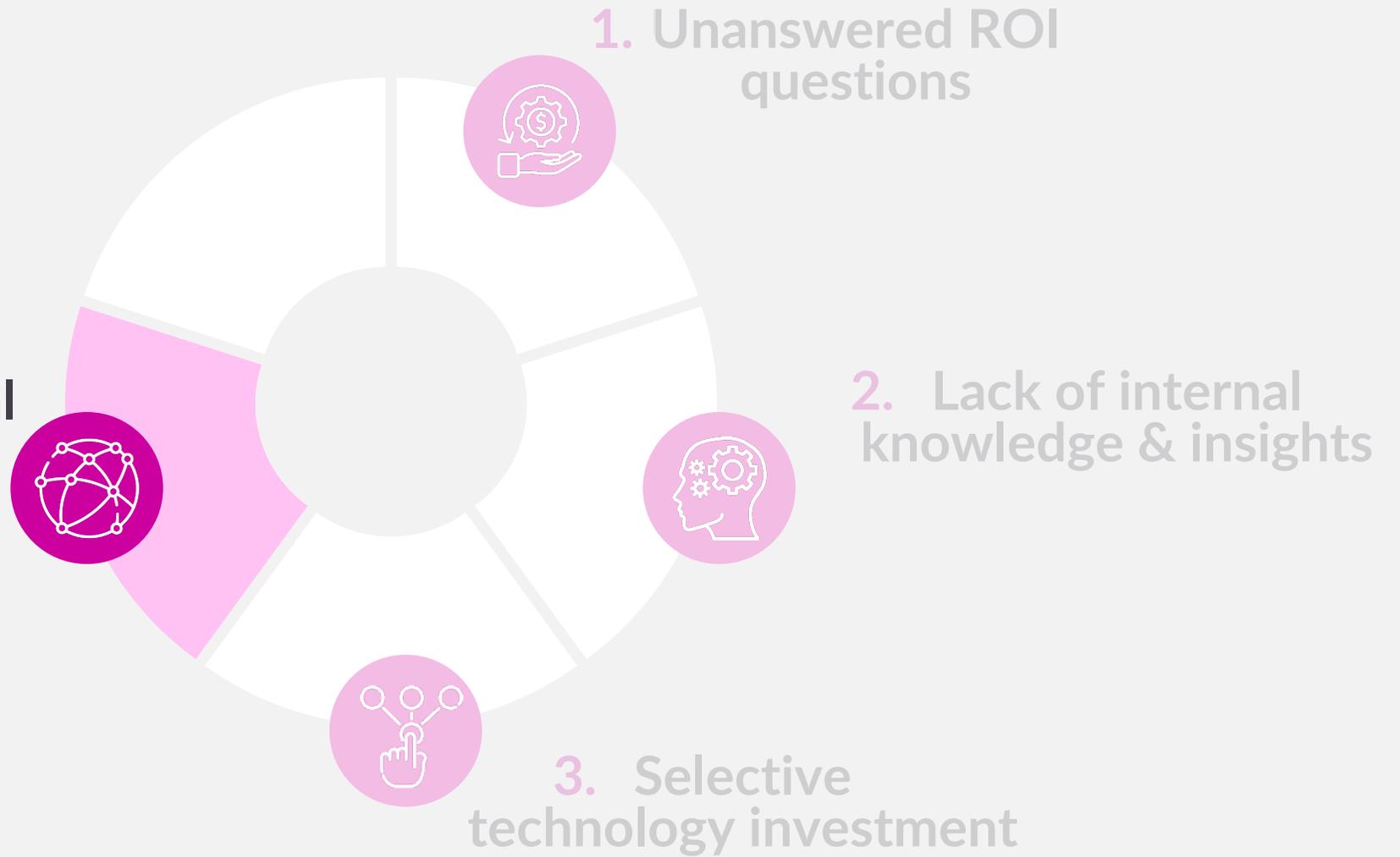
*What AI solutions will have the biggest value in the omnichannel space in the next 2 years?*



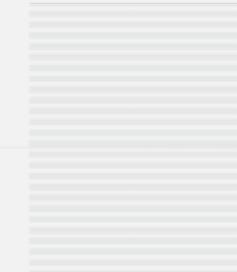
Maturometer™ 2024, EU Biopharma, n=141



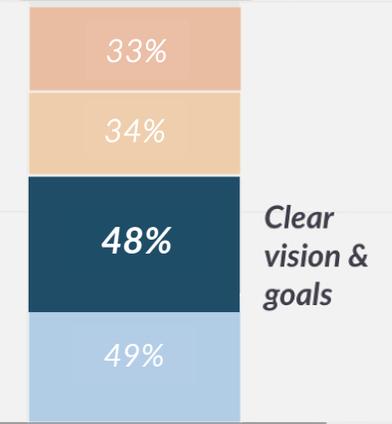
**4. Effective global-to-local strategy formulation**



# Maturometer 2024



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The industry has a clear idea of “where it wants to be” in 2–3 years (vision); however, they are struggling to formulate a plan on “how to get there” (strategy).

HQ is more optimistic on this topic than Local.

PERFORMANCE  
EU Biopharma

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



● HQ  
○ Local

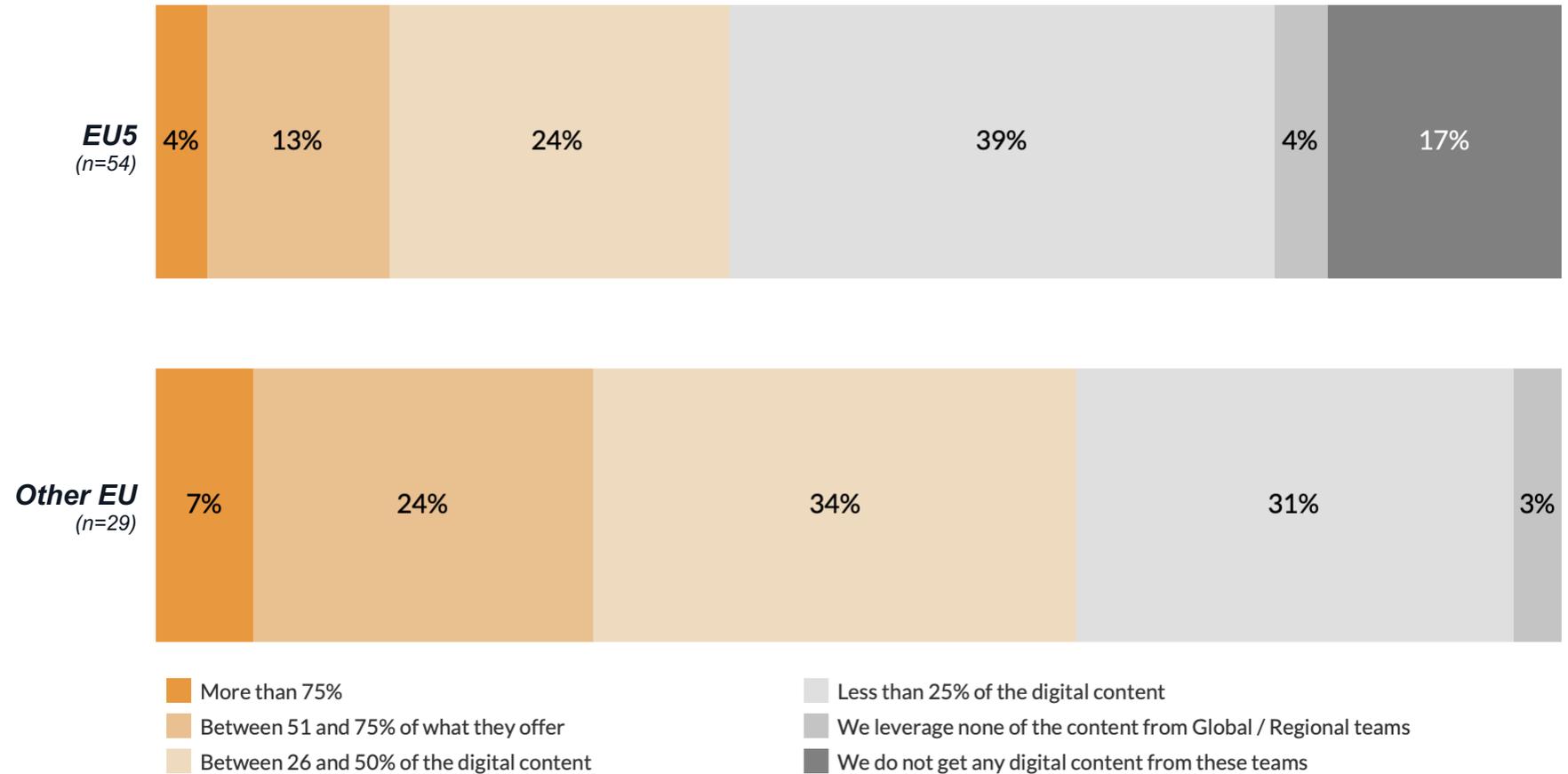
HQ EU Biopharma – n=57  
Local EU Biopharma – n=83



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

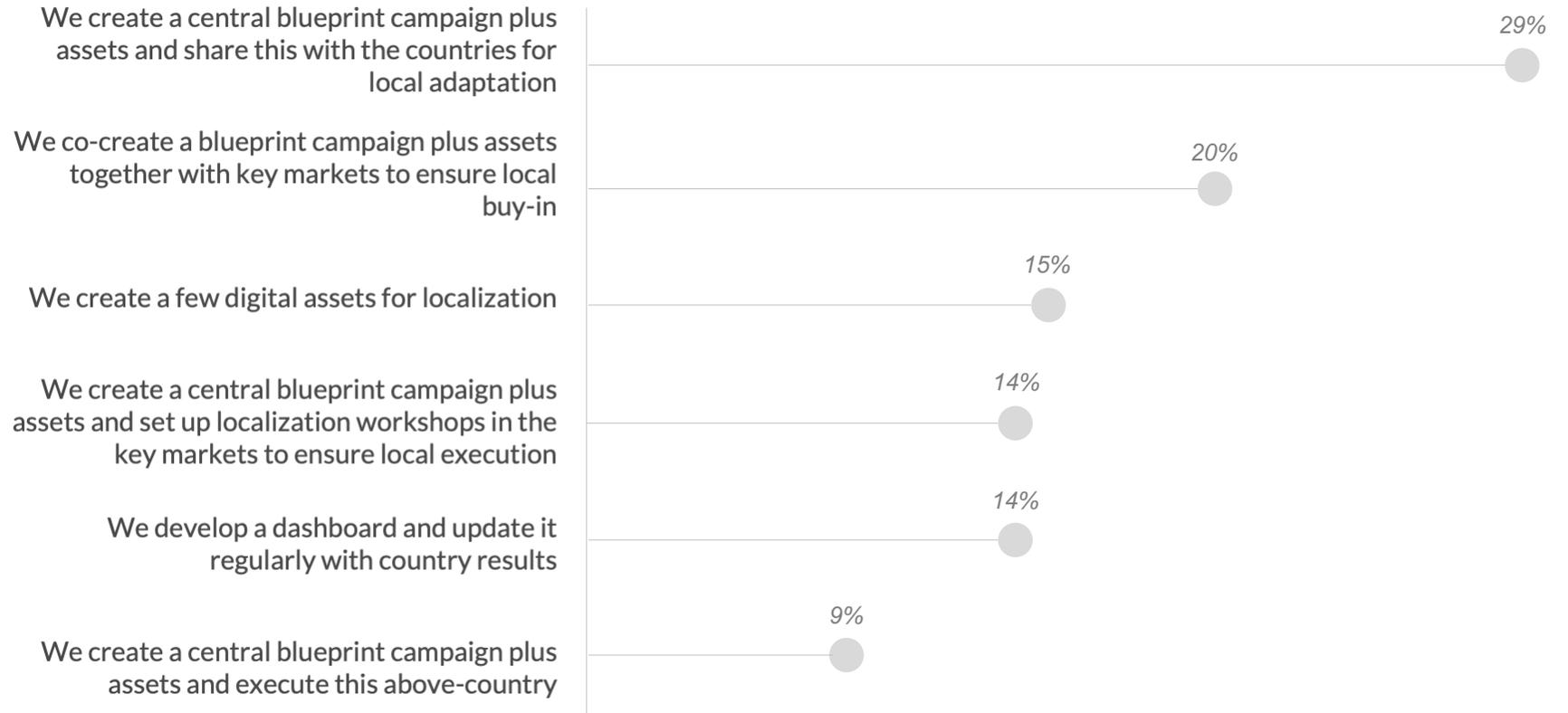
But is HQ-produced content tailored to those smaller markets?

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



**HQ currently tends to create central blueprints and assets which are then shared for local adaptation.**

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



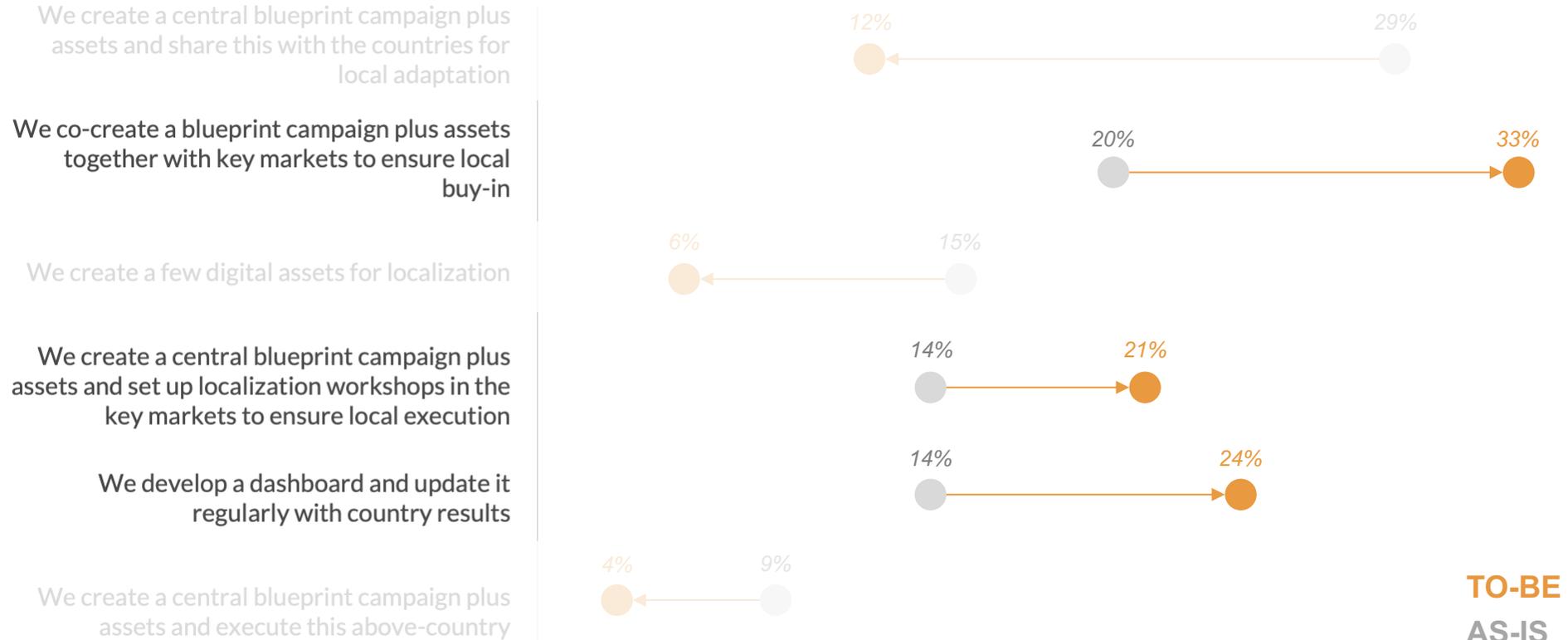
AS-IS

Maturometer™ 2024, EU Biopharma n=53



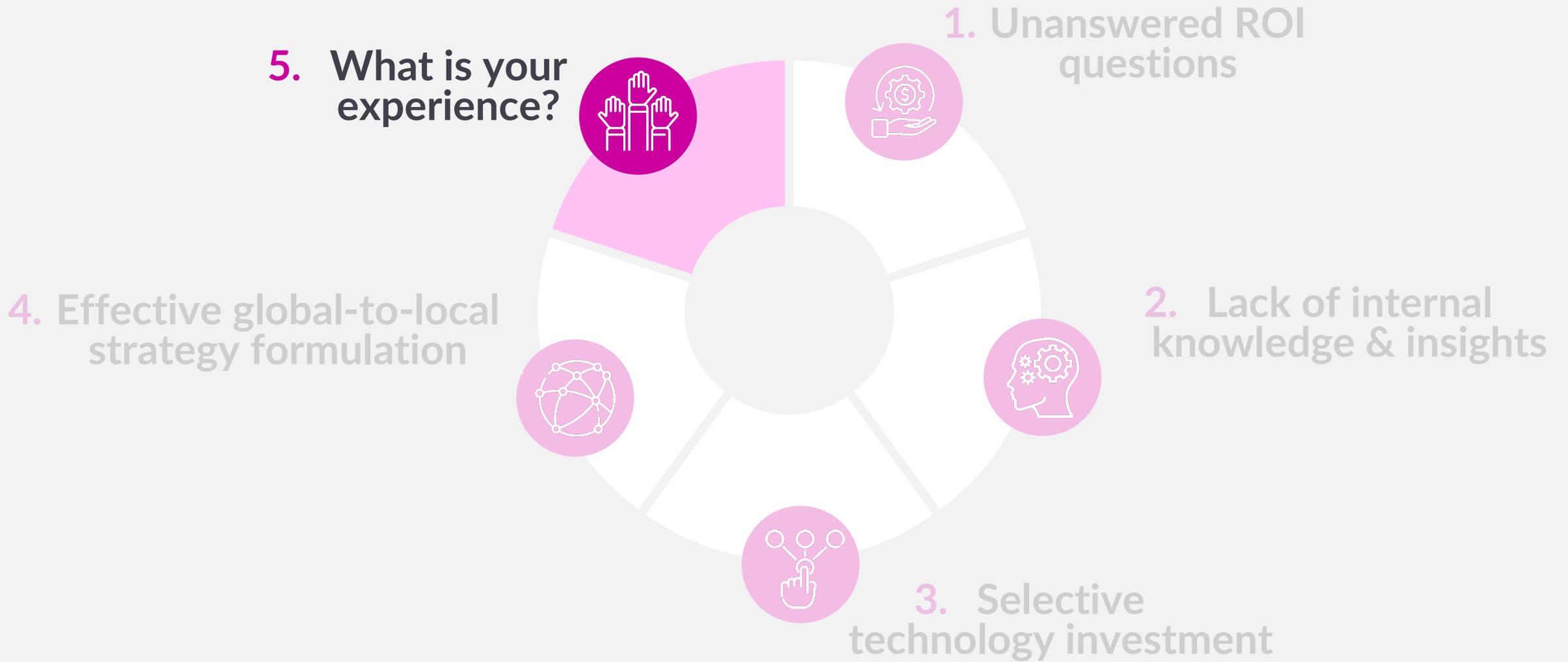
HQs plan to shift to co-created campaigns and improve local performance measurement.

? How do you want to involve key local markets in your digital planning **in the future?**



Maturometer™ 2024, EU Biopharma n=53





## POLL:

Do you believe budgets for digital and omnichannel in your organization are under pressure as well?

- Yes
- No
- Don't know



## POLL:

Which of the following barriers do you believe is primarily responsible for this in your organization?

- Unanswered ROI questions
- Lack of internal knowledge and insights
- Lack of foundational enablers (channel mix, customer experience programs, content production, etc.)
- Ineffective global-to-local strategy formulation
- Other





**Respondent  
overview**



**The industry's  
maturity level**



**Drivers of industry  
maturity level**

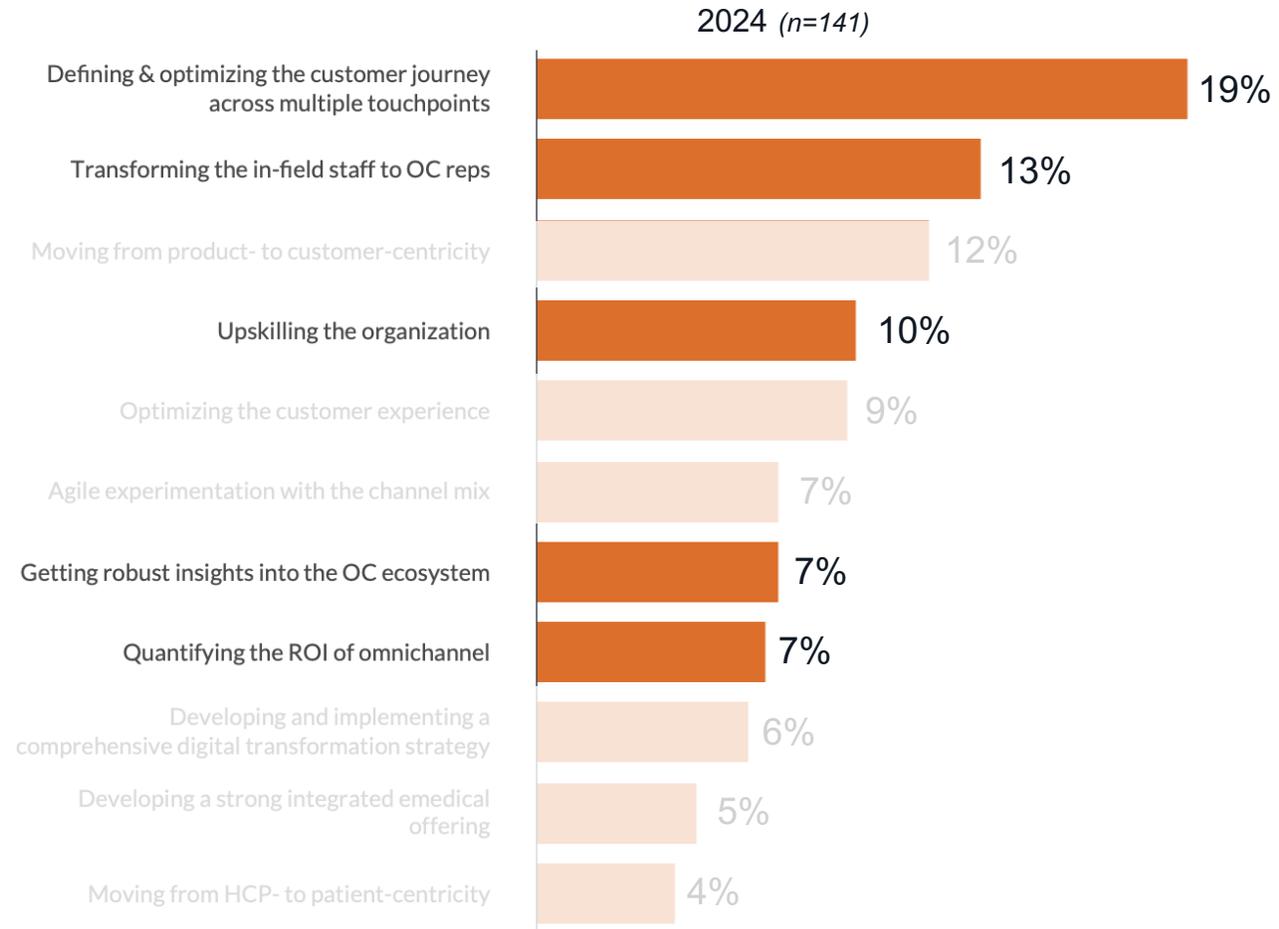


**What does the  
future hold**



*?* Please indicate the importance of these topics to your organization in the next 2 years

**When looking at pharma's ambition for the next 2 years – a lot matches to the challenges that were highlighted.**



Maturometer™ 2024, EU Biopharma



# Thank you!

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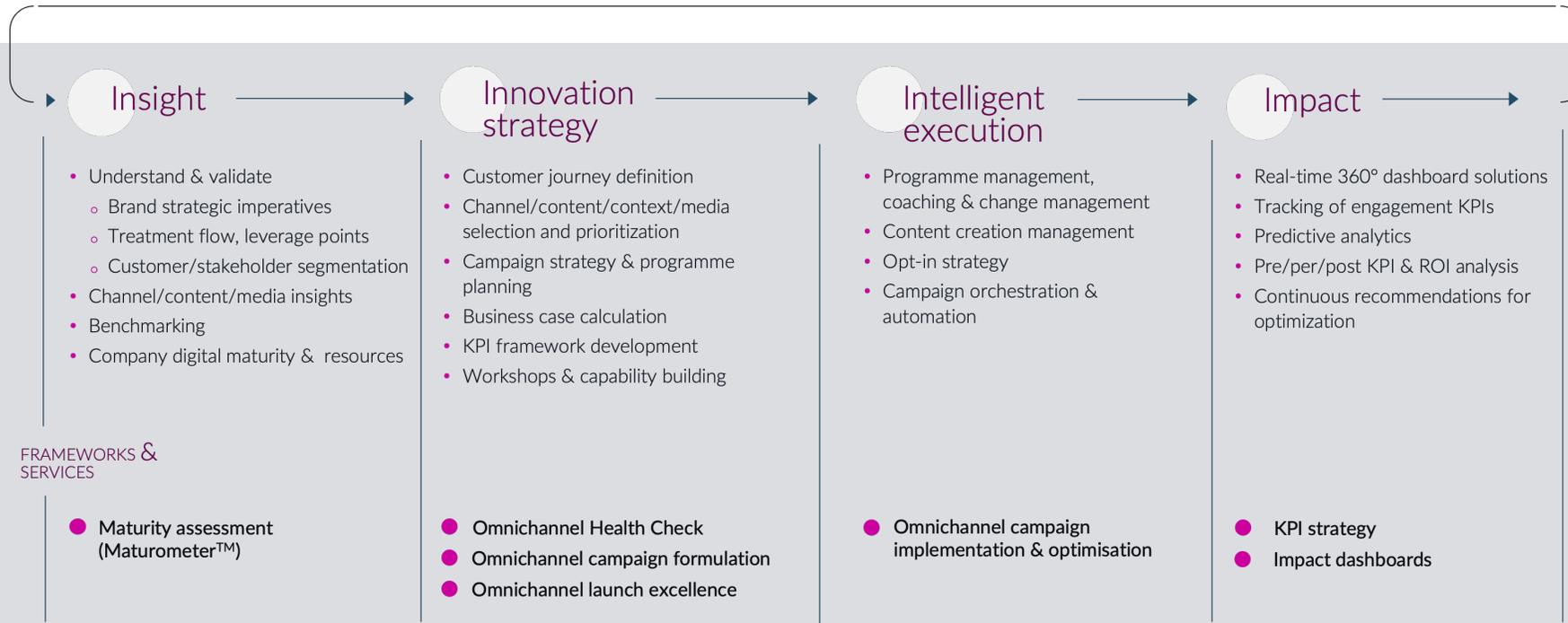
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# Our omnichannel solutions offering



**We are...**  
 omnichannel enthusiasts  
 industry experts  
 digital strategists  
 data analysts  
 trusted advisors

**We offer...**  
 end-to-end and cross-functional omnichannel consulting, products and upskilling – built on a robust evidence base – to boost your customer engagement

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PRODUCTS

## Navigator365™ REIMAGINE CUSTOMER ENGAGEMENT



Omnitopia™

SERVICES



PRODUCTS



# Please give us your feedback!

Right after the webinar a short satisfaction survey will be launched.  
We would love to know your opinion!



**Talk to us** about how our strategic consulting services – fuelled by the latest HCP and industry insights pulled from our **Navigator365™** and **Maturometer™** research – can help accelerate your journey towards delivering an unparalleled omnichannel customer experience.





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# Descriptions drivers/enablers

