

Biopharma in transition: **AI, market access & customer engagement insights**

WEBINAR #1 – THURSDAY 3/27



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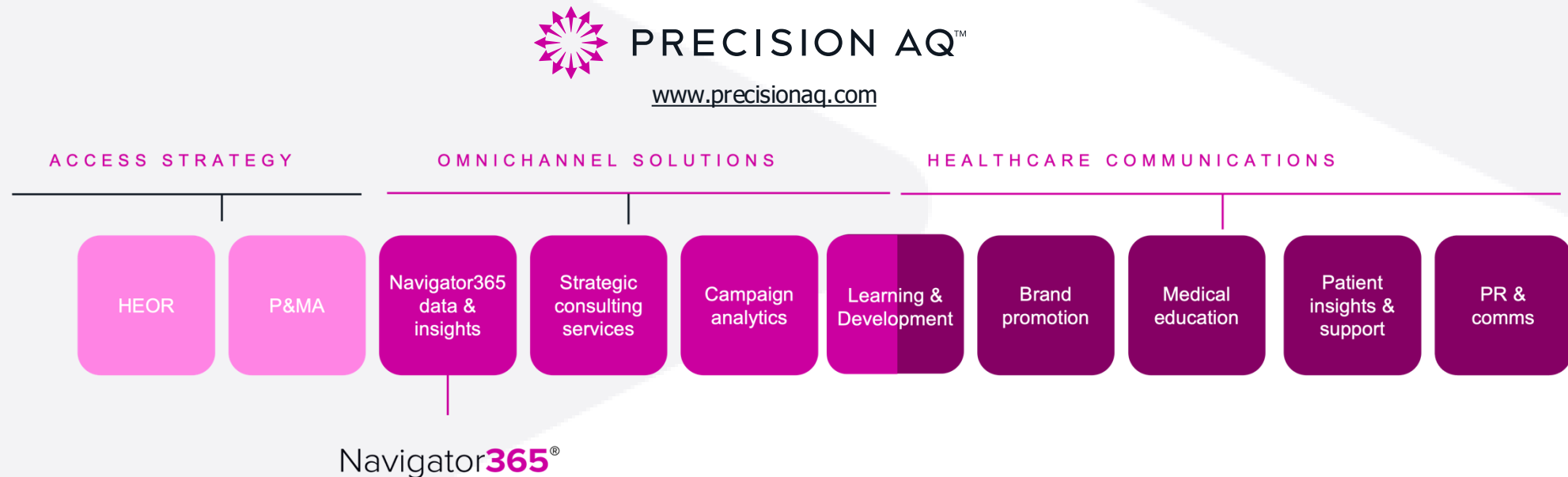
PRECISION AQ™



Precision AQ, the new name of Across Health!

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.



Your hosts for today

Ruud
Kooi



Helen
Laurence



Alex
Grosvenor



Ground rules

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



REPORT

THE STATE OF OMNICHANNEL IN BIOPHARMA 2024

INSIGHTS AND HIGHLIGHTS
FROM OUR NAVIGATOR365™
AND MATUROMETER™ RESEARCH



The 2024 Precision AQ Global Trends Report aims to share some of last year's most interesting insights and trends pulled from our industry-leading Navigator365™ and Maturometer™ research.

And we have included a sneak preview of our new 2025 AI quarterly surveys!



**AI is a hot topic in many industries,
and pharma is no exception!**



POLL

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

1. Not being considered
2. Interested
3. Key priorities identified
4. First pilots planned/in the field
5. Full rollout planned/ongoing



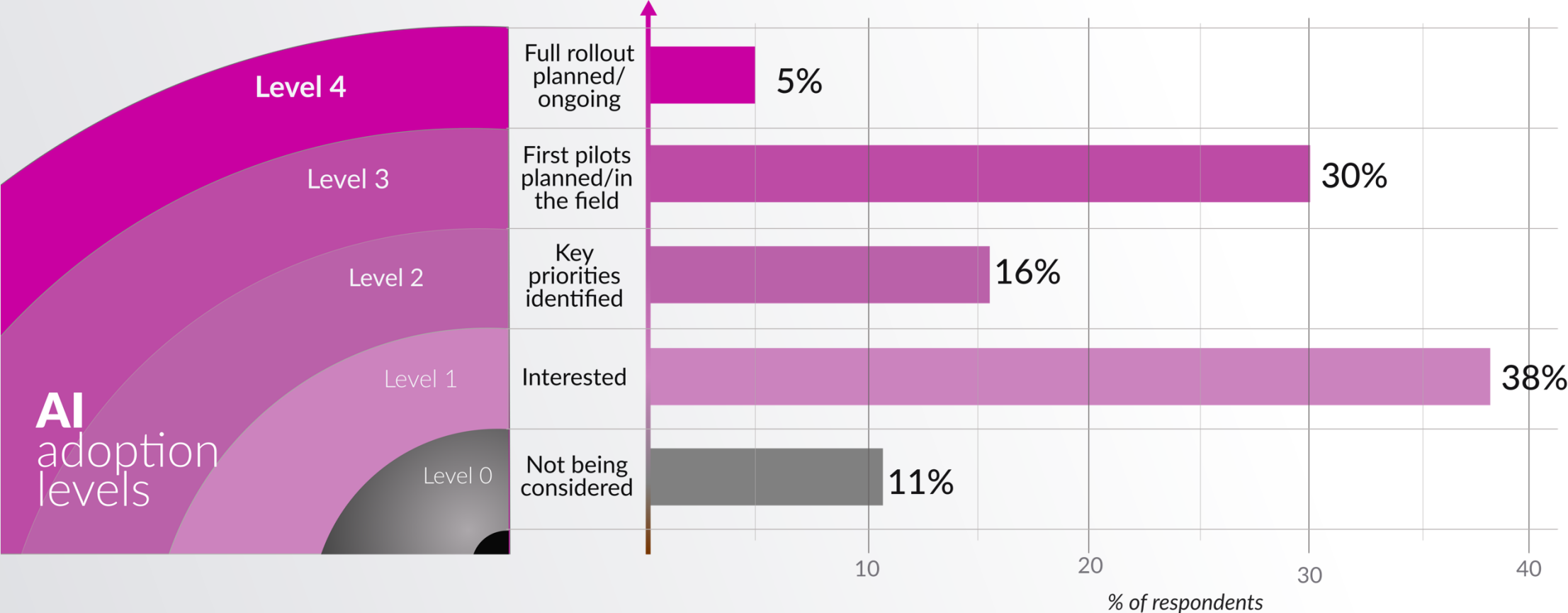
**What's the state of AI in customer engagement
according to your industry colleagues?**



What's biopharma's level of interest in AI?

The majority (89%) of European biopharma respondents report some interest in AI in their organisation

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

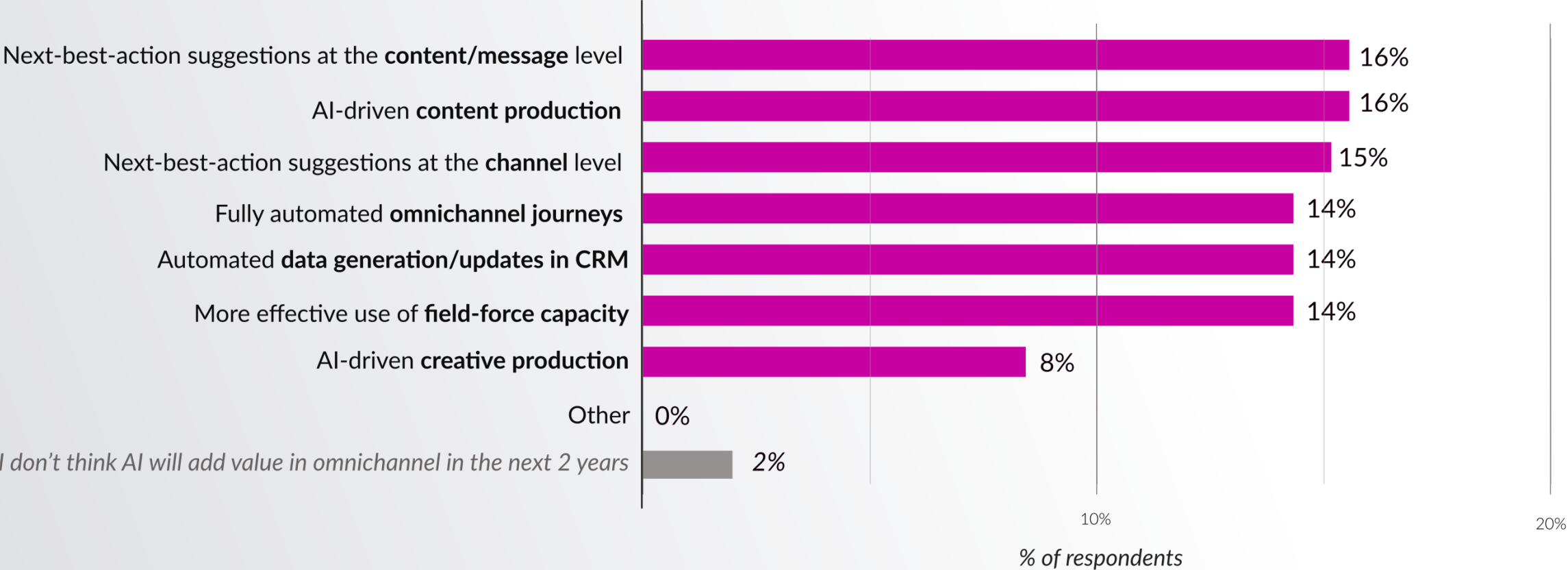


Biopharma believes AI will add value to omnichannel engagement

However, there is no clear consensus on how AI might best be deployed to drive meaningful business outcomes



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



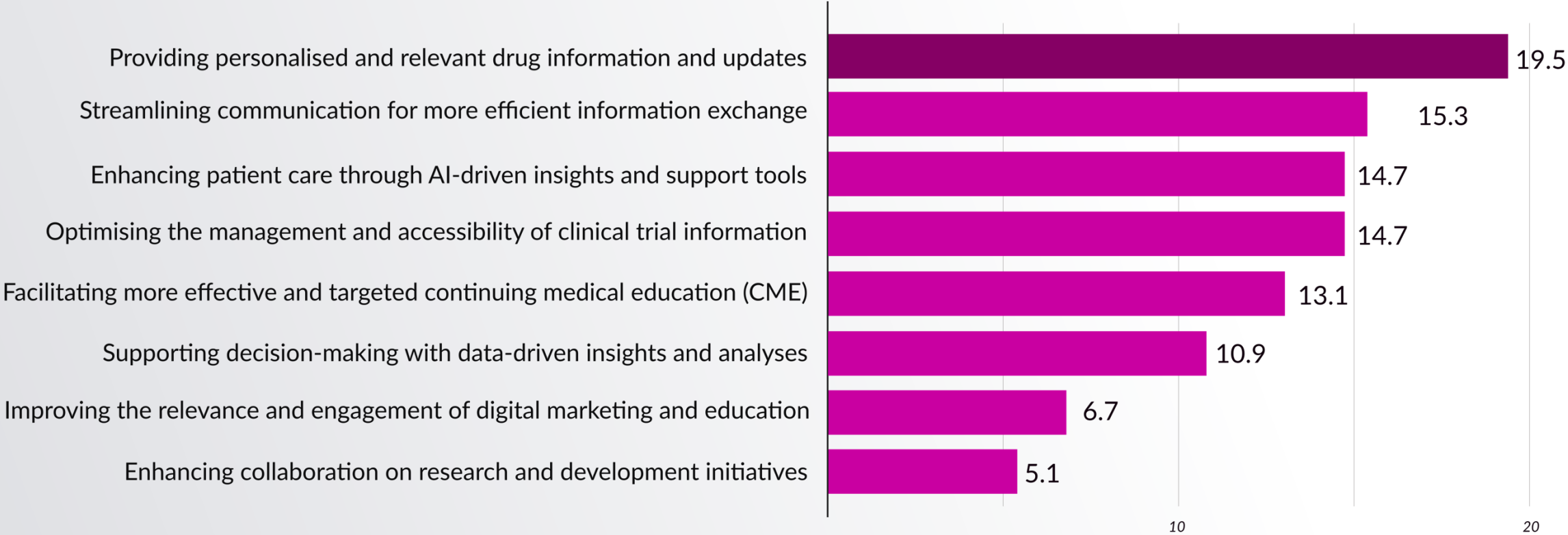
What do HCPs currently think of AI?



HCPs also find it hard to predict the *main* value for AI. Although the #1 value now is in personalised drug information and updates

In 2024, a quarter of German specialists already used a generative AI tool like ChatGPT in their daily practice

AREAS OF VALUE FOR AI IN PHARMA - 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

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

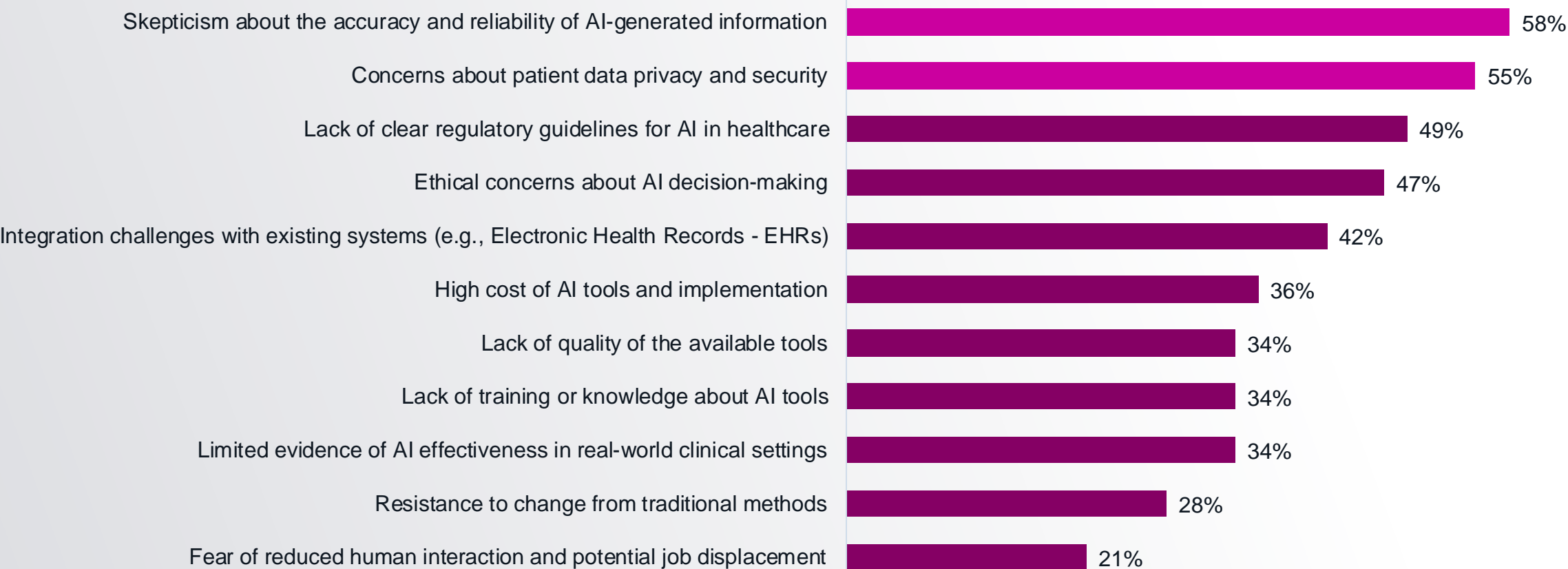


Concerns around reliability and security dominate

What do you see as the main barriers to adopting AI tools in your practice?

HCPs were asked to select all that apply

N=53



% among HCPs

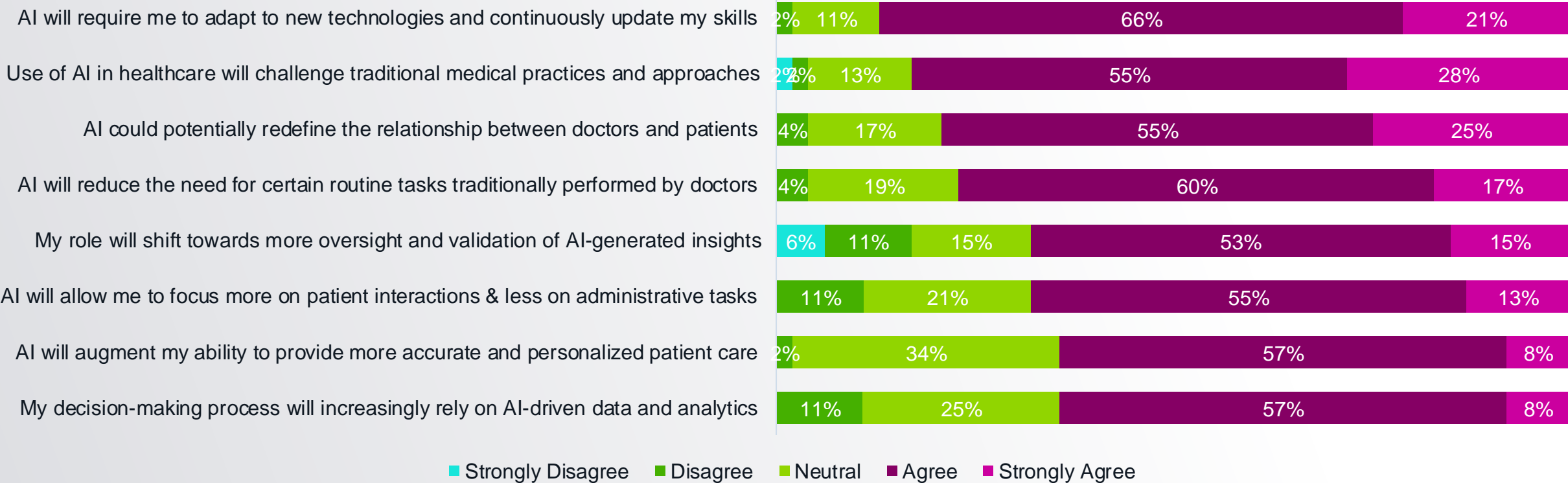


Most HCPs are already convinced that AI will have a disrupting and leading impact on their role as healthcare provider

How will AI impact your role as a healthcare provider over the next 5–10 years?

HCPs were asked to indicate their level of agreement on a given scale
N=53; US ; Q1 2025

PREVIEW

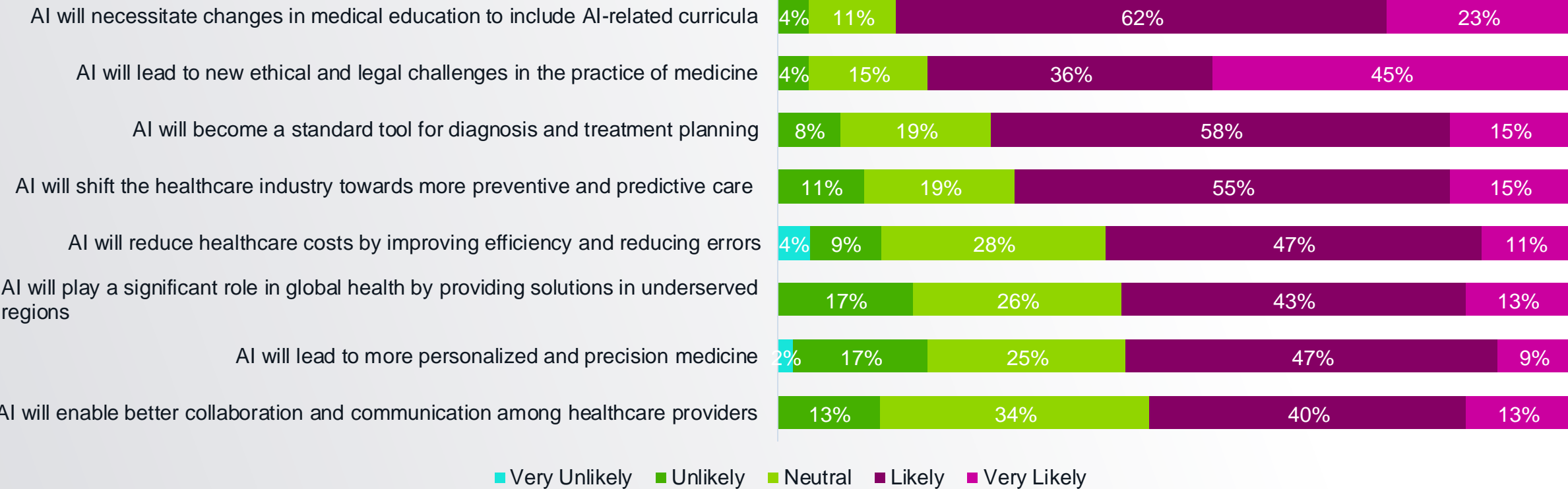


... and, speaking generally, they see benefits on the horizon

How likely do you think the following changes are as AI becomes more prevalent in healthcare over the next 5–10 years?

HCPs were asked to rate the likelihood on a given scale
N=53

PREVIEW



Open invitation co-creating our quarterly AI Navigator365 survey

If you are interested in joining us to co-create our quarterly AI tailored Navigator365 survey, scan the QR and leave your details.

We are looking for your co-creation to:

- decide on countries to include
- decide on speciality groups to include
- receive your desired AI question suggestions
- deliver maximum insight value and superior actionability for our 10,000+ pharmaco Navigator365 users!

If you leave your contact details, we will be in touch soon!

Deadline registrations is April 11th.



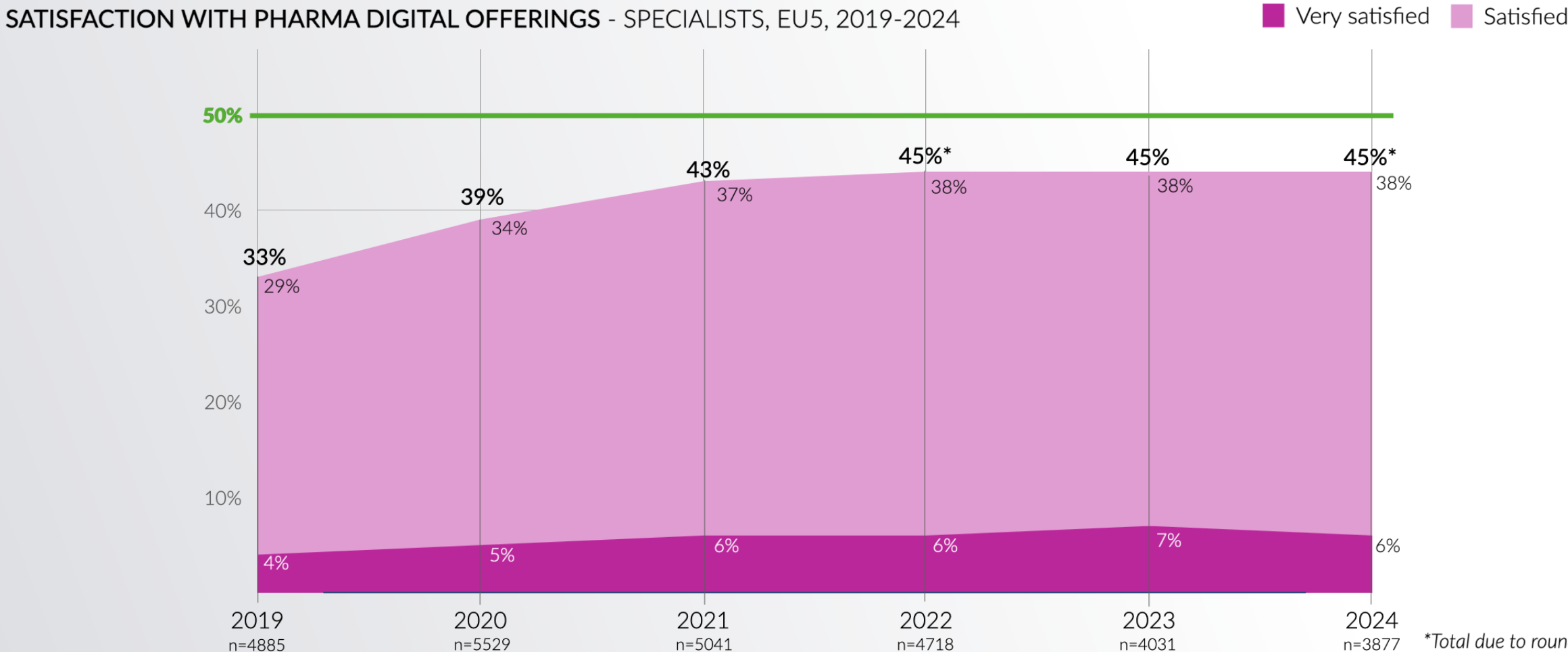
So, those HCP expectations are sky high!

Do those first AI initiatives already result in higher HCP satisfaction with pharma's current digital offerings?



Unfortunately, not yet. HCP satisfaction with biopharma's digital offerings has stagnated and remains below 50%

After small but steady gains, HCP satisfaction with biopharma's digital offerings appears to have plateaued



AI is not the silver bullet, like digital, multichannel and omnichannel weren't either in the past...

But AI will help us unlock potential to better and easier service our HCPs



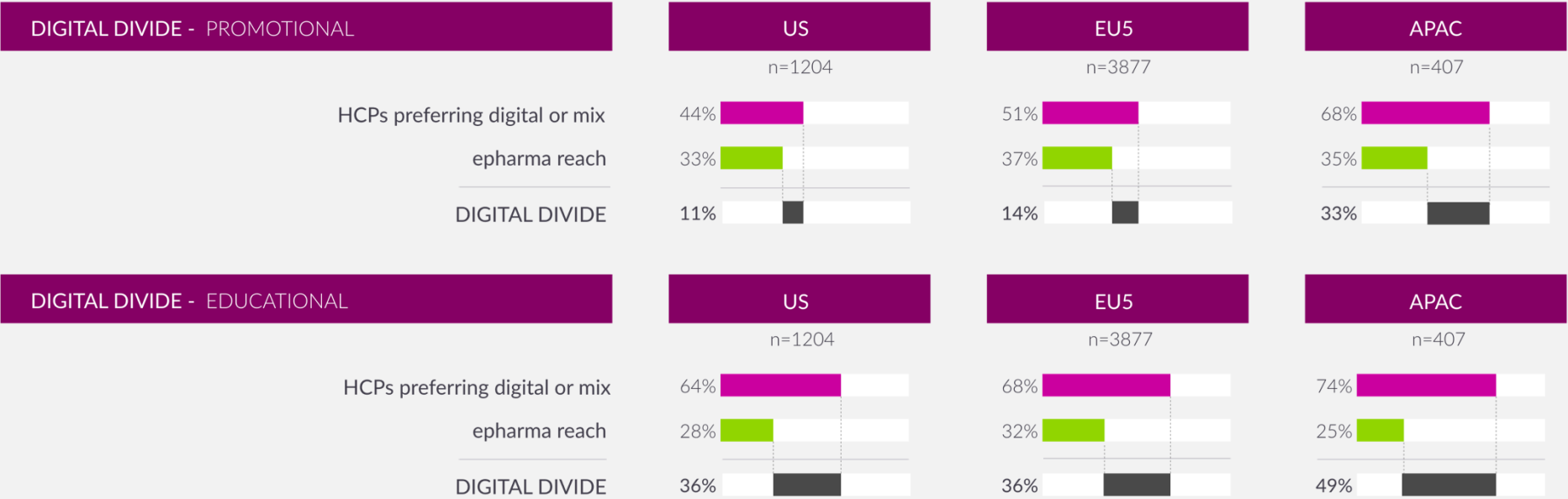
**What do HCPs actually want
in terms of digital engagement?
And how will AI help us with that?**



HCP demand for digital/omnichannel engagement is still outstripping supply from pharma

This ‘digital divide’ creates a significant opportunity for (or risk of) competitor differentiation – particularly for Medical

DIGITAL DIVIDE - ALL SPECIALISTS, 2024



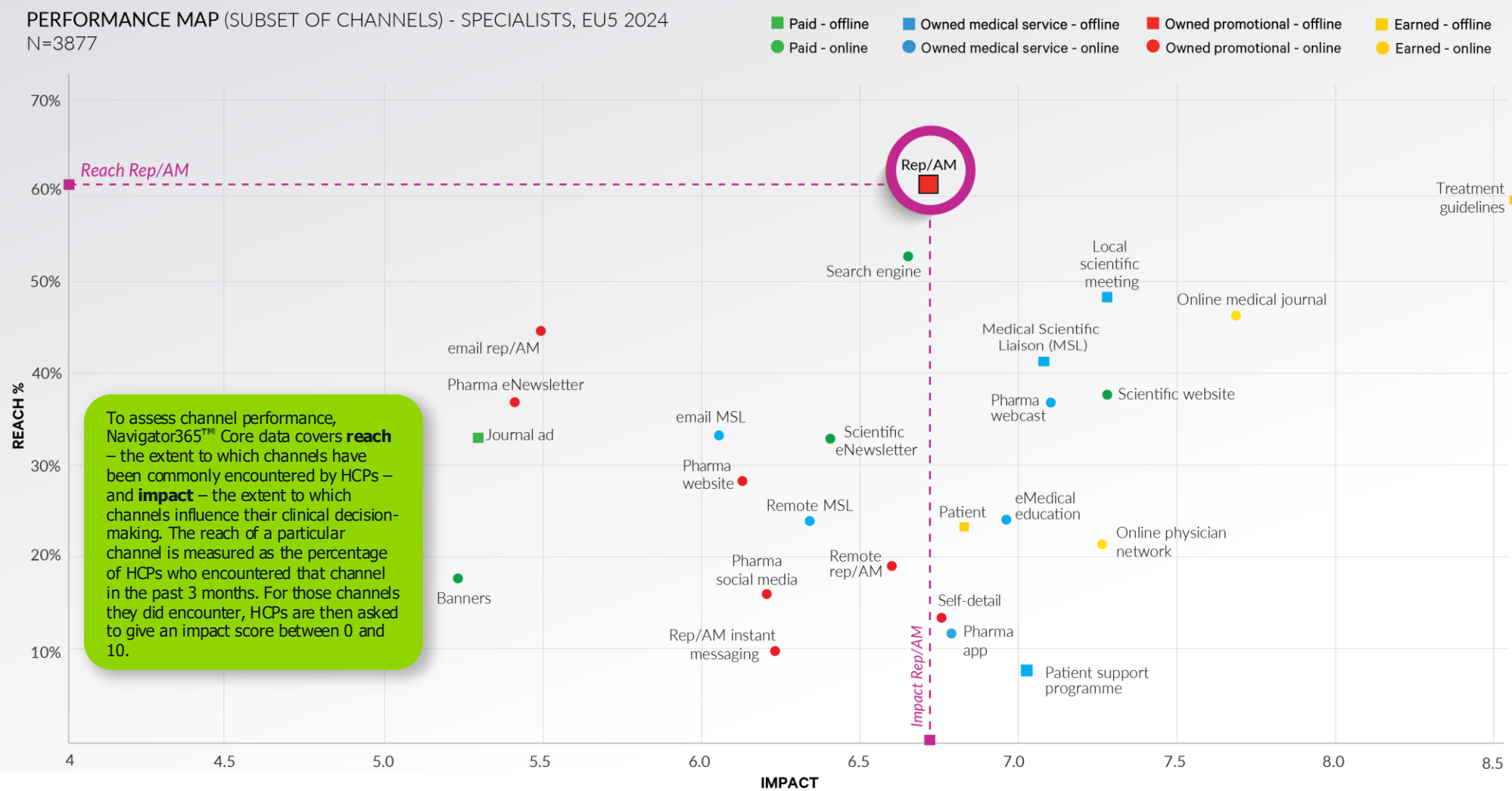
The digital divide is defined as the delta between the % of HCPs preferring digital or mix and the average % reach of the top 3 online educational or promo channels ('epharma reach')

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



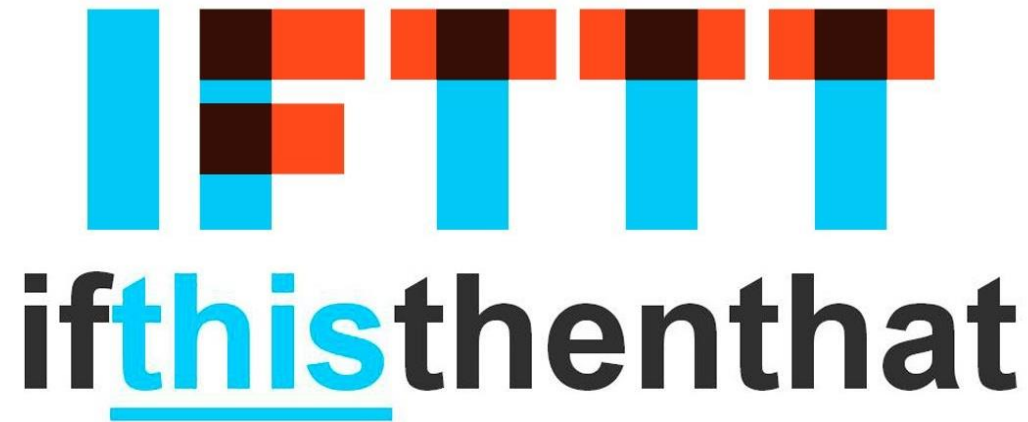
Navigator365 insights will help you identify which channels are most used and most influential on HCPs' clinical decision making

Offering historical trends in a structured data format, tailored per country and per therapeutic area



AI will help you unlock even more insights based on the latest Navigator365 data, combined with our historical trends and channel dependencies using millions of Navigator365 data points, allowing you to better engage with and service your HCPs

By creating profiles, combined with your owned interaction data, delivering better on the next best action promise in channel, platforms, message, content and timing...



Especially if you would add our head-to-head competitive ranking using the customer experience Navigator365 Cx Benchmark

Leverage your leadership channels and fix your lagging channels...



Do you have the expertise to navigate this increasingly AI/digital/omnichannel-driven world effectively?



POLL

Do you feel you have sufficient knowledge and expertise to navigate this increasingly AI/digital/omnichannel driven world effectively?

1. More than sufficient
2. Sufficient
3. Between sufficient and insufficient
4. Insufficient
5. Totally insufficient



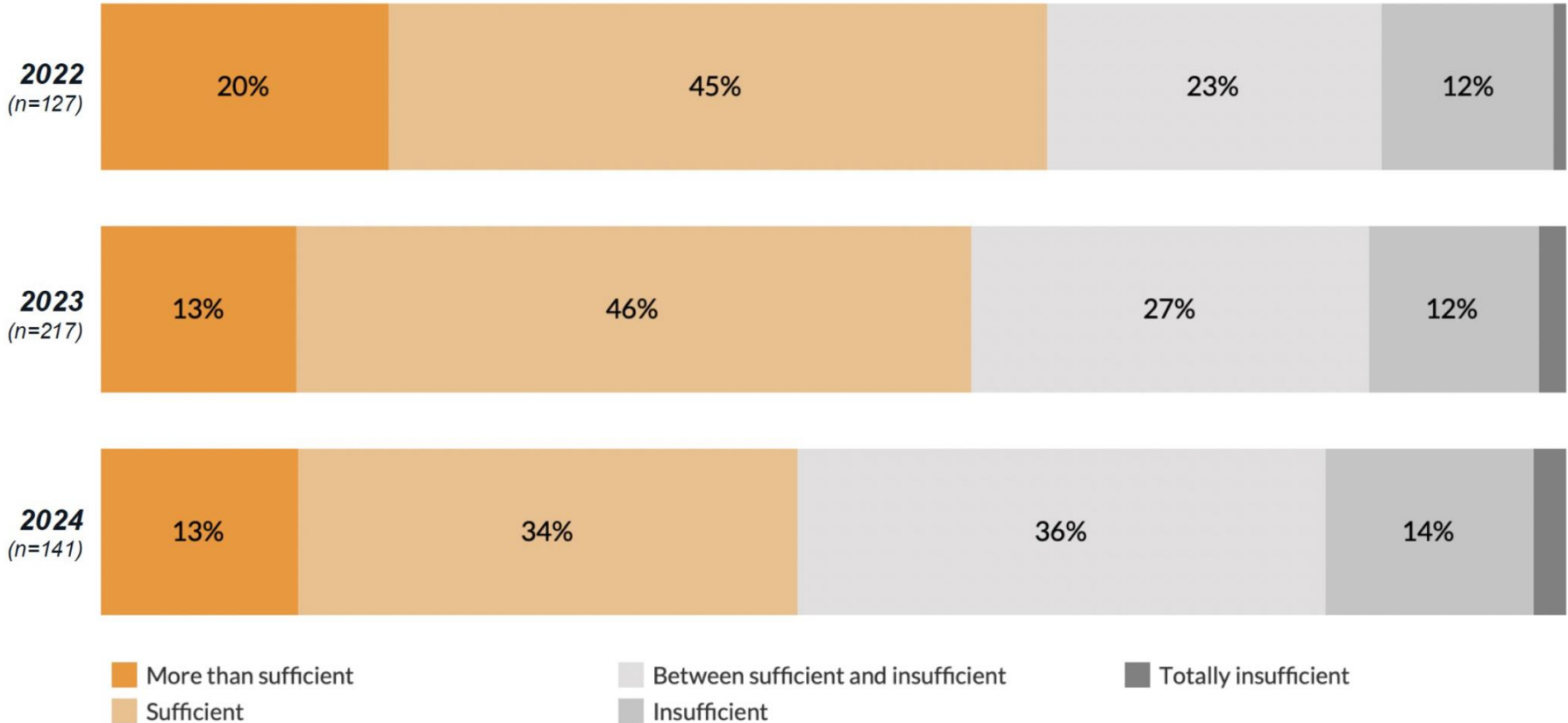
Does the industry have the expertise to navigate an increasingly AI/digital/omnichannel driven world effectively?



Digital confidence levels continue to decline for a third year in a row



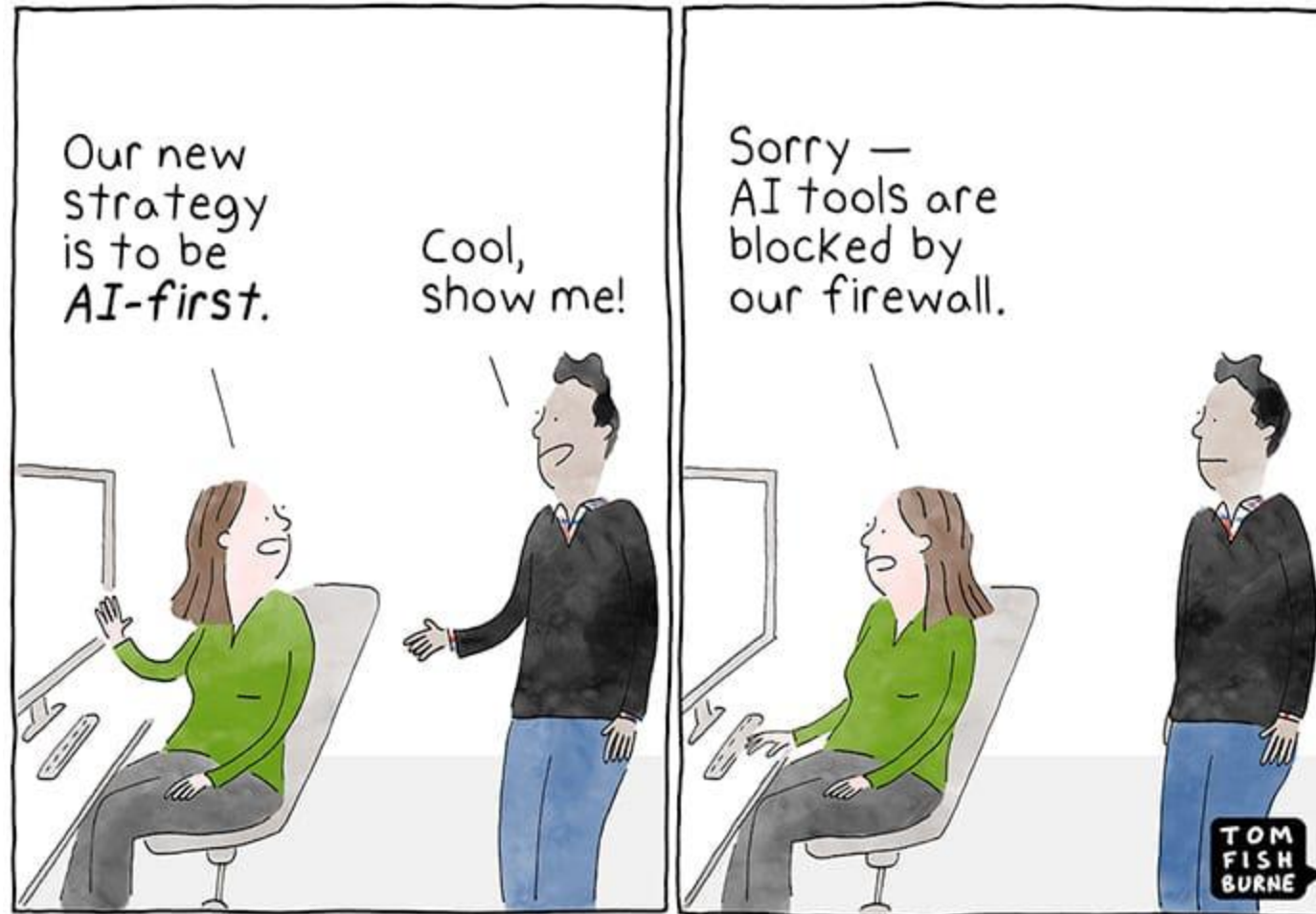
Do you feel that you have sufficient knowledge of all opportunities offered by digital for your business activities?



Source: Maturometer™ 2022-2024, EU Biopharma

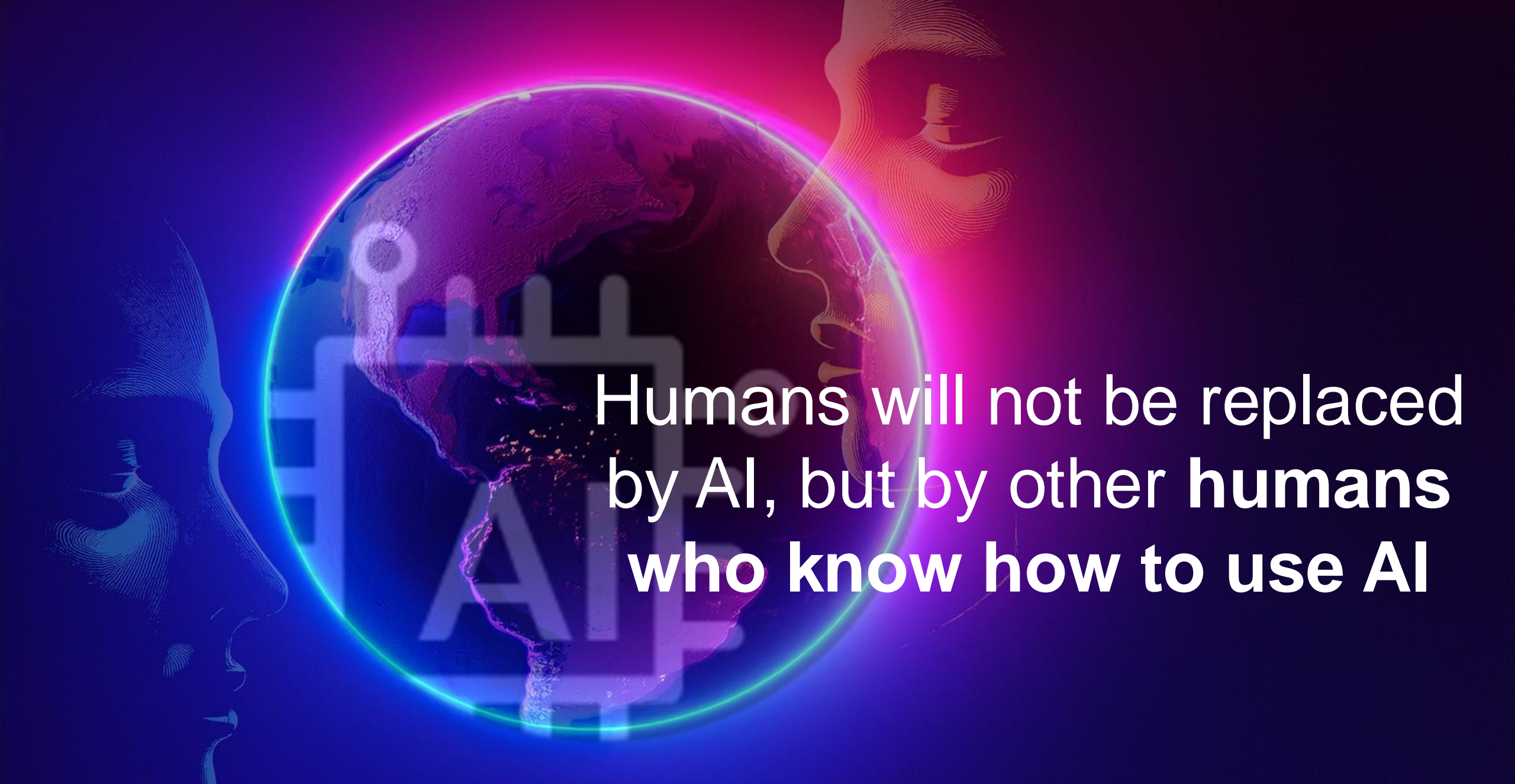


Not all of us are equipped yet to get AI mastered



© marketoonist.com





Humans will not be replaced
by AI, but by other **humans**
who know how to use AI



**THINK BIG
START SMALL
SCALE FAST**



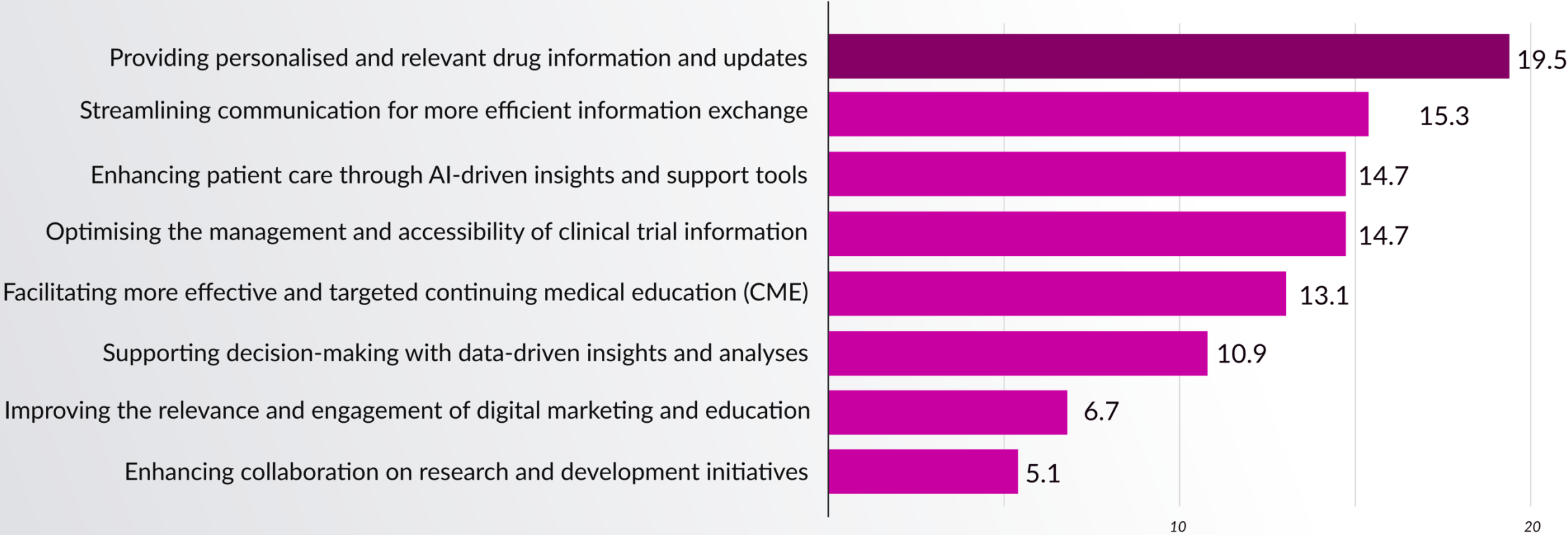


Getting personal: focusing on
the individual HCP experience

Let's remind ourselves of what the German specialists told us

Personalised, relevant information is a key priority

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We live in a world of digital personalisation



BECAUSE YOU
WATCHED



Why should Pharma be any different?



POLL

Which digital transformation solutions might help us meet the challenge?

1. Consolidate the information
2. Prioritise the user experience
3. Incorporate a range of formats
4. Use AI algorithms to ensure relevance and preferred format
5. Create spaces for networking and P2P interaction
6. All of the above
7. None of the above



Case study: Digital personalisation

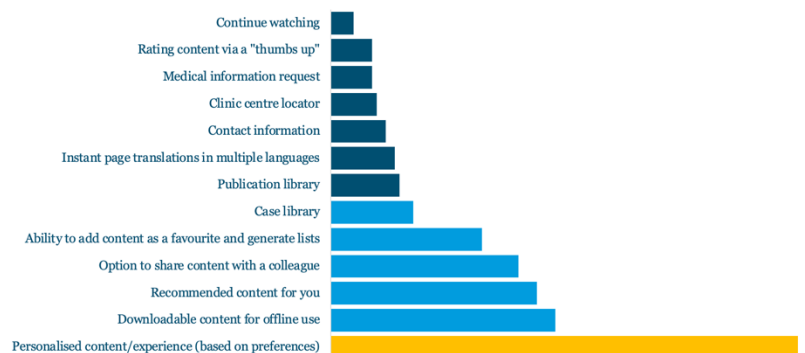
THE CHALLENGE:

Pharmaco had a wealth of online educational content spread across platforms; difficult to access and not streamlined according to specialism

ALL RESPONDENTS

What features and functionality would you like to see?

81% OF RESPONDENTS WOULD LIKE TO SEE PERSONALISED CONTENT



THE SOLUTION: Digital transformation with a personal touch

- ✓ Consolidating the information into one central, accessible hub
- ✓ Prioritising the user experience
- ✓ Range of formats to meet learner preferences – films, webinars, podcasts...
- ✓ Using AI algorithms to ensure customers receive information that is **relevant to their specialism** and in their **preferred format**
- ✓ Creating spaces for networking and peer-to-peer interaction
- ✓ Driving traffic through social media and regular newsletters

41,155 visitors & 88,748 page-views in 12 months since launch

3,000+ new opt-ins for newsletters



First steps: what can AI offer our industry?



Significant efficiencies in content localisation



Faster, more comprehensive research



New ways to simplify data and improve engagement

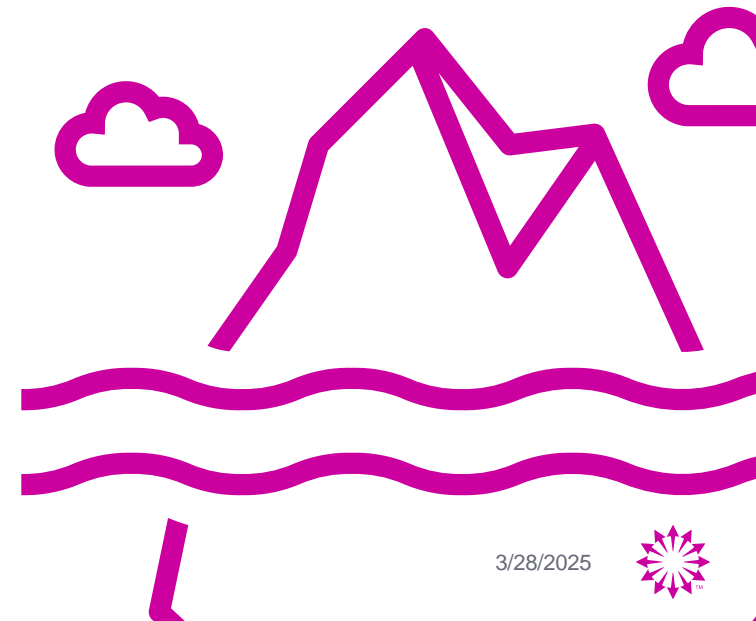


Embedding of Diversity, Equity and Inclusion (DEI) principles



Patient (and investigator) materials in the clinical trial setting

...and this is just the
tip of the iceberg



...but there is still a long way to go



Some things AI can't offer...

- Strategic rigour and nuanced campaign planning
- Internal or external alignment – bringing people together to break down barriers or create a shared vision
- Confidence that compliance requirements have been met
- Compelling, inspired, original creative concepts
- Reliable and robust scientific materials
- 100% accuracy
- The human touch that can be the difference between a good programme and a great programme



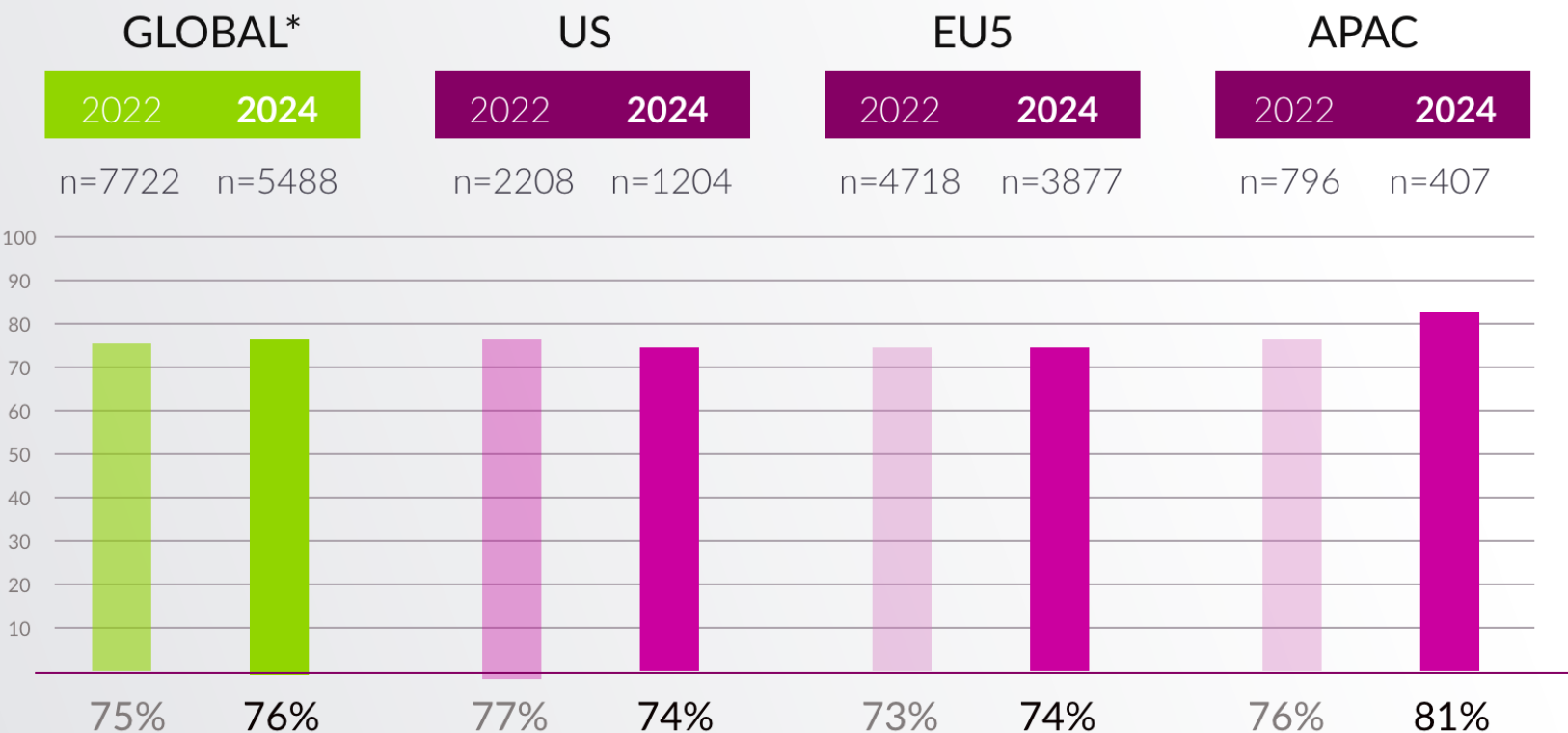


AI & Market access

Payer engagement is crucial for pharma success as they control access and exert a heavy influence on HCP decision-making

Yet omnichannel remains immature with payer audience (vs. commercial, medical)

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



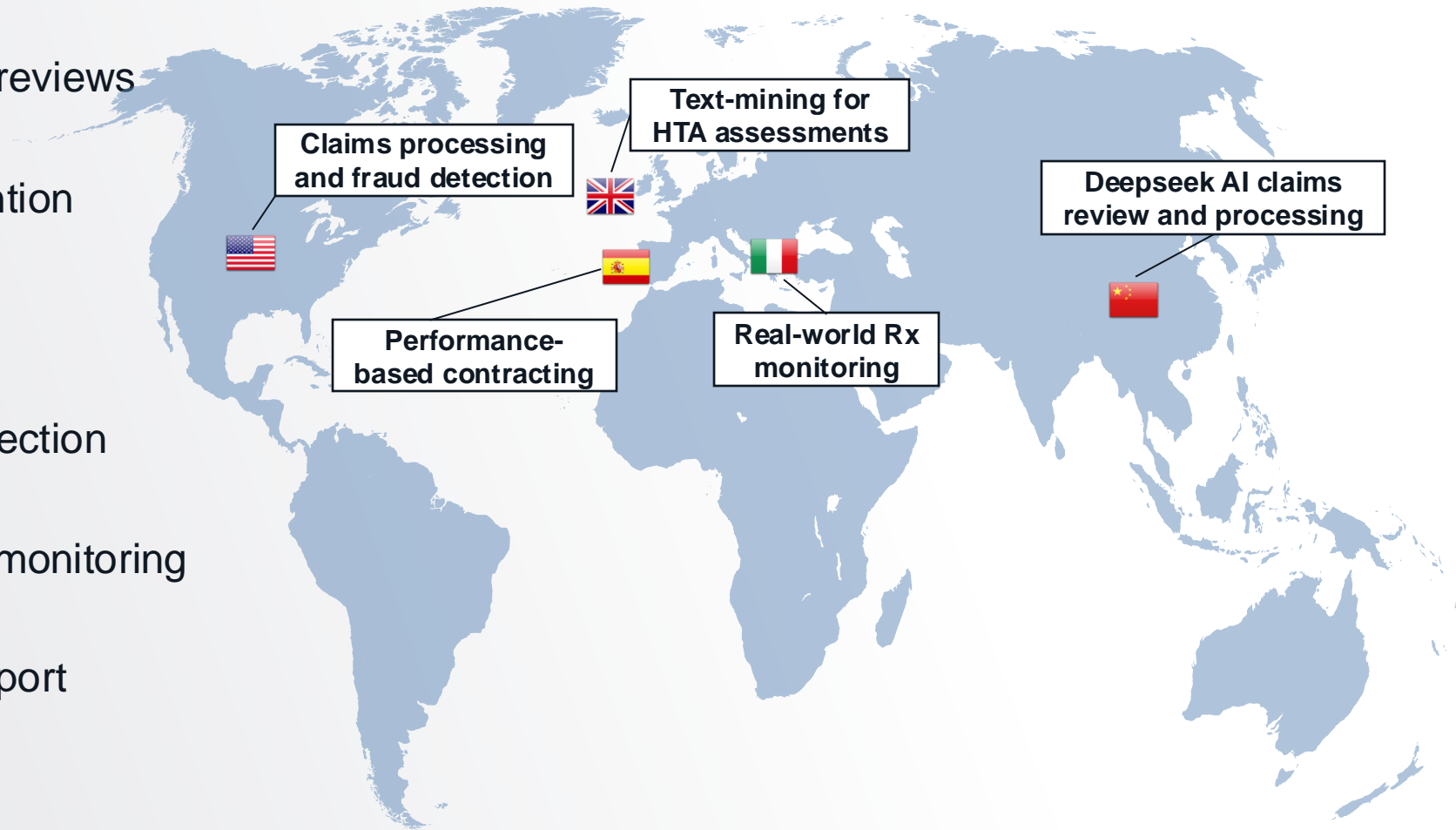
*Global: US, EU5, APAC averaged (mean)

Source: Navigator365™ Core, all specialists, consolidated data



Payers are already leveraging AI for operational support, but new pilots signal interest in AI-driven decision-making

- 1 Coverage & prior authorisation reviews
- 2 Fraud detection & waste prevention
- 3 Performance-based contracting
- 4 Off-label & unapproved use detection
- 5 Risk stratification & adherence monitoring
- 6 Data integration & decision support



As AI continues to evolve, payers will explore new ways to integrate it into logistical and decision-making processes

1

Continuous repricing

Real-time analytics to continuously reassess cost-effectiveness of high-budget drugs for repricing

2

Performance-based contracting

AI-driven monitoring of real-world outcomes linking reimbursement to patient benefits

3

Indication-based pricing

AI-driven patient segmentation for multi-indication therapies, reshaping negotiation dynamics

4

Coverage refinements

Frontier AI models (LLMs and predictive analytics) to identify off-label or low-value usage



Despite emerging opportunities, payers still face major regulatory, resource, and ethical barriers to broader AI adoption

► Regulatory & policy constraints

Ongoing legal uncertainty around AI (e.g., EU AI Act) and strict data privacy laws (e.g., GDPR) limit large-scale data sharing

► Data integration & quality:

Fragmented healthcare databases and inconsistent data quality undermine the reliability of AI-driven insights

► Organisational & resource gaps

Insufficient in-house AI expertise, siloed workflows, and budget constraints slow implementation, validation, and maintenance

► Financial & ROI uncertainty

High upfront costs and long payback timelines hinder large-scale pilots, especially in cost-constrained public health systems

► Ethical & trust concerns

“Black box” algorithms and potential biases reduce stakeholder confidence; AI-generated dossiers raise questions about reliability and judgment in evidence selection

“AI tools are being tested by individuals, and the HTA agencies are looking into it, but I haven’t seen formal adoption yet.” – Precision AQ Payer Strategy Team (Spain)

“I’ve been asked about AI-written dossiers for submissions. I’m not sure if AI is sufficiently reliable yet—there are so many judgments about what to put in and leave out. Can it produce a dossier? I’m sure it can. But will it be as good as the human version?” – Precision AQ Payer Strategy Team (UK)



Summary

- HCPs are very bullish in their expectations and see almost every aspect of their role being affected or disrupted
- Pharma will need to get going; plan, try, test, learn, fail or scale
- Your AI algorithms require structured and historical HCP data to provide optimal HCP engagement suggestions
- HCPs will expect pharma to follow the AI development pace to provide better and personalised engagements
- The personalisation seen in streaming services, social media and online retail, needs to become the norm in pharma
- AI allows cost-efficient tailoring of materials and faster research, but it works best when humans are there to provide strategy, guidance and nuance – the human touch is still vital!
- The same is true in market access, where payers are slower adopters, but the potential applications are huge.
- It's very early days still, with a lot of challenges and uncertainties ahead, but pharma has a big role to play in shaping how payers embrace AI to support their decision-making





Q&A

Thank you!

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pulled from our industry-leading Navigator365™ and
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Health
Check



Omnichannel
campaign
formulation



Omnichannel
(pre-) launch
excellence



Omnichannel
campaign
optimization

OC CAMPAIGN ANALYTICS



Measurement
feasibility analysis
& implementation



Impact
dashboards

OC CAPABILITY DEVELOPMENT



Landscape
analysis
insights



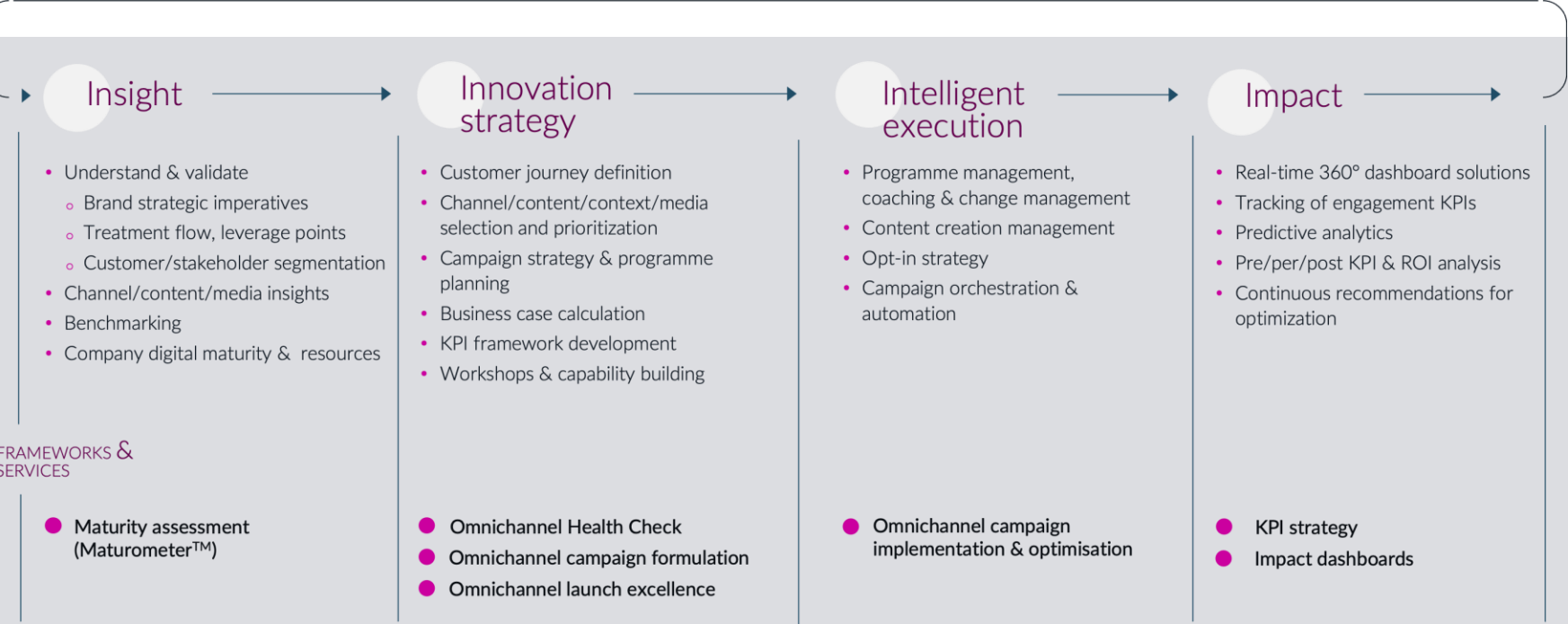
Campaign
strategy &
tactics skills



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Our omnichannel solutions offering



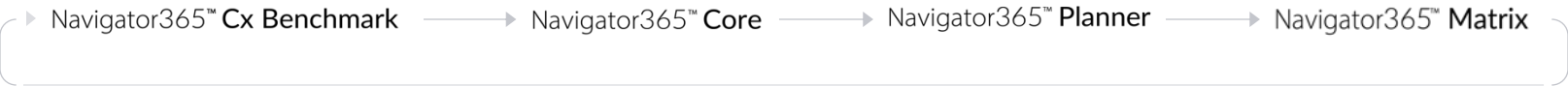
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digital strategists
data analysts
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