

Medical's Road Map for Social Media Success

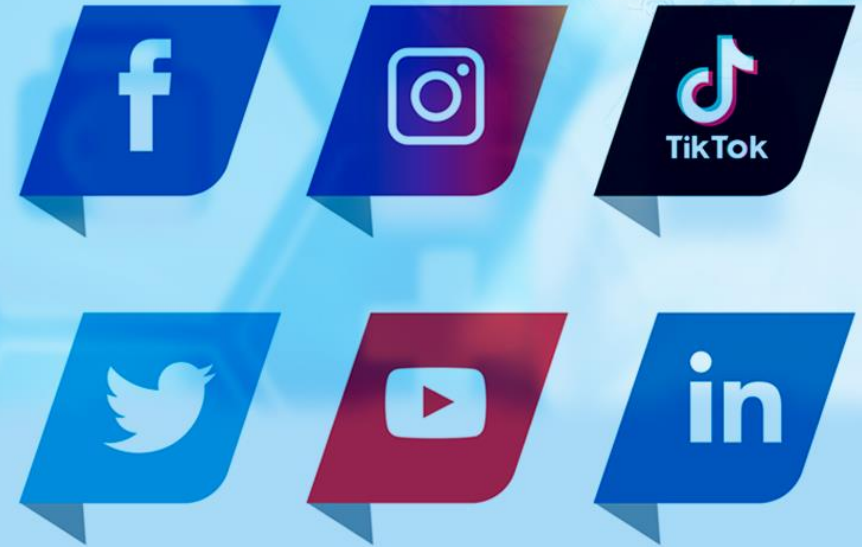




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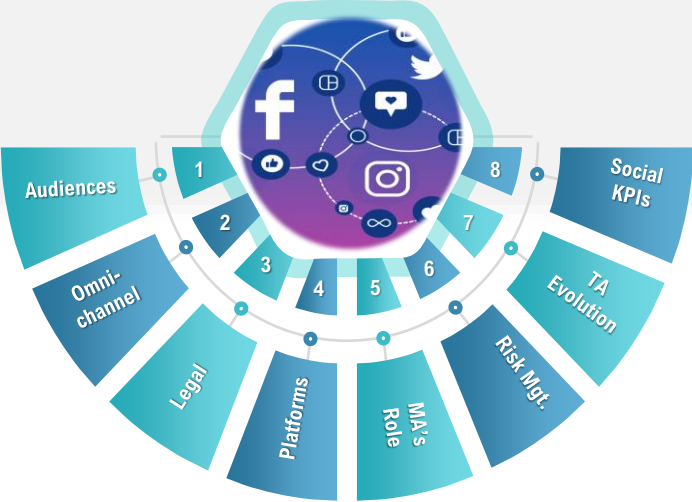
ISSUE

MEDICAL ISSUE: Medical Affairs teams seek to understand *best practices* employing Social Media to inform Thought Leaders, HCPs, Patients and other stakeholders regarding its science across Rare Disease, Oncology, and Immunology therapeutic areas (TAs). This landscape benchmarking review examines Social Media trends and success factors in harnessing this channel for effectively educating the market.

METHODOLOGY: This analysis uses an integrated framework to examine current trends and future directions to construct the *Roadmap for Social Media Success* under Medical Affairs auspices. 48 Medical leaders from 36 companies working across 21 therapeutic areas (TAs) participated in this study and segment analysis.

Social Assessment Framework

This Social Media Roadmap analysis probed no less than eight critical areas informing Medical Affairs' rapidly evolving role in using social media to inform different audiences regarding new science and data.



Universe of Learning: This Social Media & Medical study is powered by 48 Medical executives working globally across 36 biopharma companies and their divisions

Total Benchmark class



Therapeutic Area Segmentation: Participants were further stratified into 3 key therapeutic areas to probe innovation patterns & maturity differences



Medical Affairs in Social Media Benchmark: Study Topics and Examined Segments

Research Methodology

- This study engaged 48 leaders from 36 biopharma organizations via a benchmark survey.
- Data segmented by oncology, immunology, and rare disease therapeutic areas as well as by global, U.S.-only, and Europe-only coverage. Additional cross-tabulations were highlighted where necessary.

Social Media Structure

- Social Media Account Quantity
- Separation of Accounts
- Large Pharma's Cornerstone Social Uses
- Share of Account Ownership
- Medical Affairs Involvement
- Vendor Utilization

Social Media Activities

- Platforms Used
- Target Audiences
- Social Media Goals
- Proactive vs. Reactive Interaction Proportions
- Proactive Social Media Activities for Medical
 - Disease State Info, On-Label Clinical Data, New or Expanded Indication Clinical Data, New Science/Abstracts, Industry/Community Commentary
 - Effectiveness **by Platform**
 - Effectiveness **by Target Audience**

Omnichannel Integration

- Omnichannel Social Media Structure
- Medical's Omnichannel Activities for Social Media
- Social Media Audits in Medical Affairs
- Medical's Content Re-sharing Policies
- Re-shared Content Types
- Omnichannel Social Media Structure

Message Characteristics & Performance Measurement

- Social Media Committees for Medical Legal Review
- Message Orientation
- Message Content
- Engagement KPIs
- External Collaboration

Overview of Segments and Cross-Tabs Investigated in This Study

Main Data Segments and Cross-Tabs Reported in this Study:

Total Benchmark Class (TBC)

N = 48

- Data based on survey responses from all 48 survey responses

Oncology

N = 17

- Data based on survey responses from companies with an indicated focus on the Oncology therapeutic area

Immunology

N = 11

- Data based on survey responses from companies with an indicated focus on the Immunology therapeutic area

Rare Disease

N = 8

- Data based on survey responses from companies with an indicated focus on a Rare Disease

Global

N = 32

Insights from Medical social media teams covering multiple regions

U.S. Only

N = 11

Insights from Medical social media teams covering the United States only

Europe Only

N = 5

Insights from Medical social media teams covering EU5 countries only

Cross-Tabs Highlighted Where Noteworthy:

Medical Leads Social Account(s)

N = 7

Cross-tab investigated in select areas when respondents indicated that **Medical Affairs leads social media initiatives and operates accounts.**

Social Media Compliance Team

N = 28

Cross-tab investigated in select areas when respondents indicated that **Medical Affairs contains a team specifically focused on social media medical compliance**

Select Key Insights

Impact of Structure on Social Function: It appears groups that prioritize social media activity -- through structure, clear roles and ownership, and growth of social media compliance teams in Medical -- evidence greater social collaboration, account innovation, and broad-reaching activities.

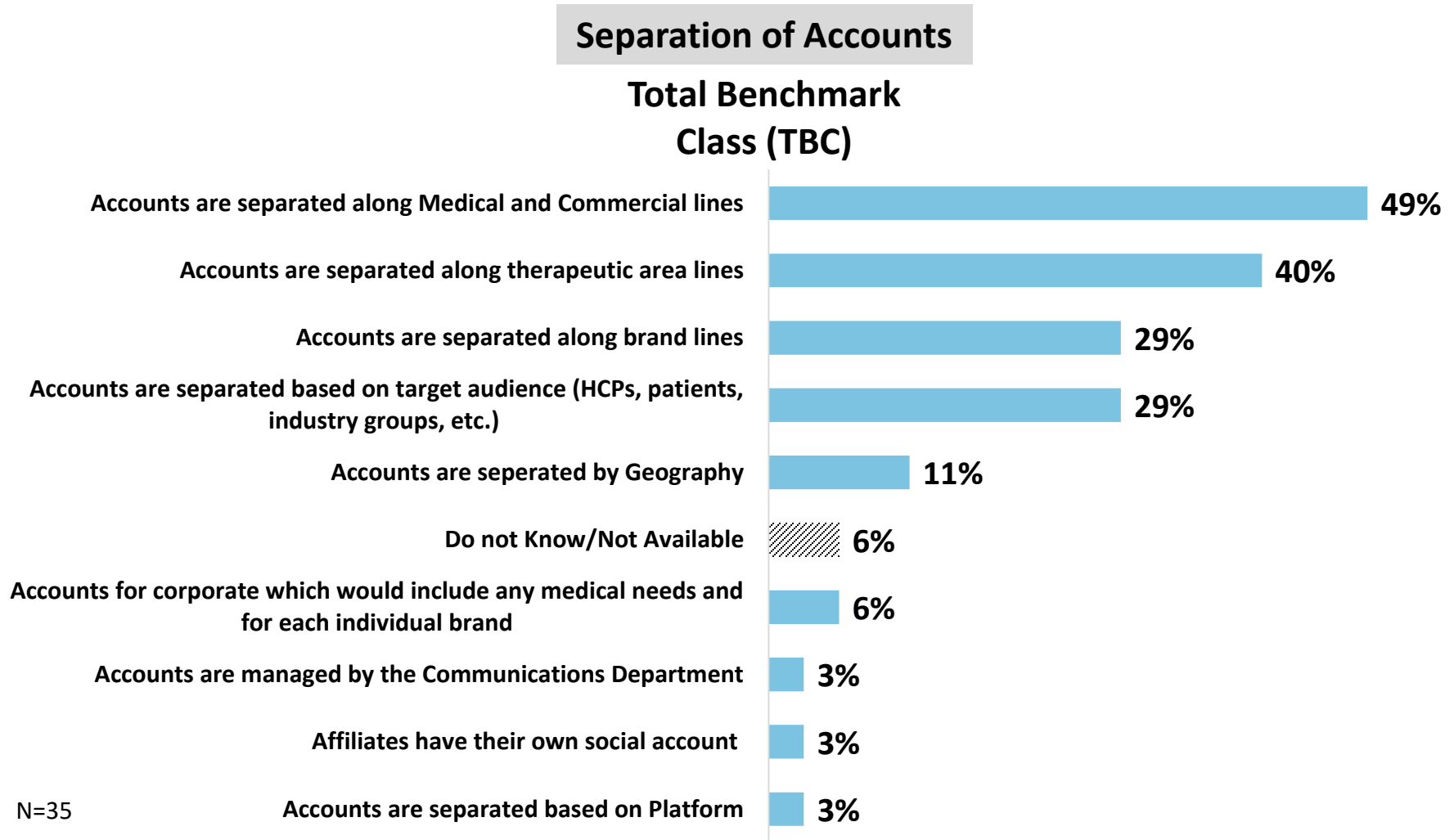
Compliance a Priority for Medical: 4 out of 5 organizations with Medical-led social media accounts install a social media committee for medical compliance.

Channel Agility: Social channels are used for different purposes to reach diverse stake-holders with different content. Clinical trials, new science, gov't affairs, PAG's, & corp. scientific branding are innovation fronts.

Social Listening & Data Sharing: Oncology and Immunology groups excel at social media listening, rare disease excels at raising awareness of clinical data against segments.

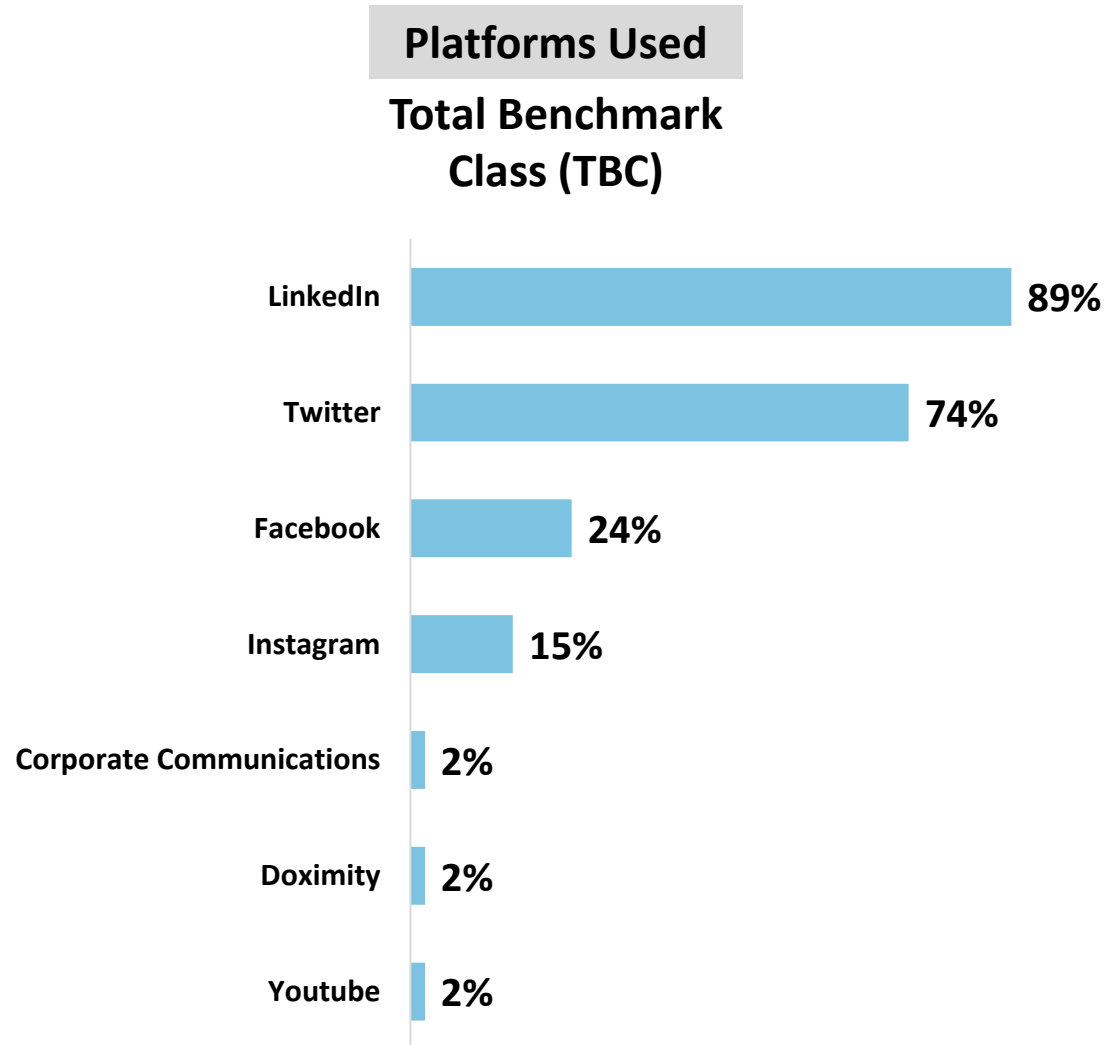
Clinical Data Sharing: EU shies away from clinical data sharing via social media, while other regions more actively support it.

Common Account Division: Social media accounts are most often separated by Medical/Commercial and Therapeutic Area distinctions



5) Please select the option(s) below which best describes how your organization's Social Media accounts are separated at your organization.

Most Preferred Social Media Platforms (TBC): LinkedIn and Twitter are the most used platforms -- with Facebook, Instagram and others lagging far behind

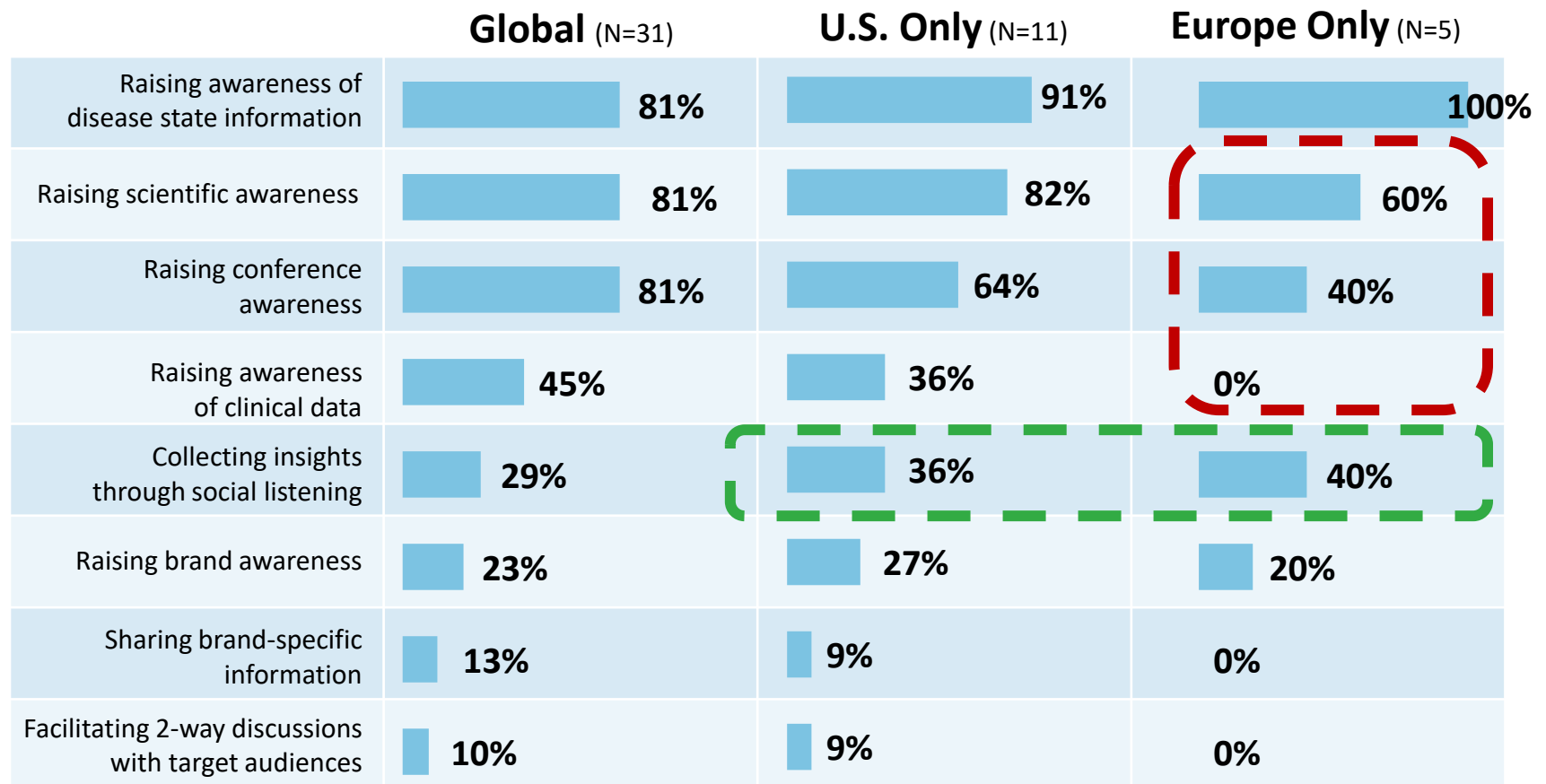


N=46

9) Please select the platforms below which are utilized by your Medical Affairs group.

Geographic Focus: Social Media priorities vary across regions with Social Listening occurring more often in US and EU and clinical data sharing absent in EU

Social Media Goals – Geographic Segments

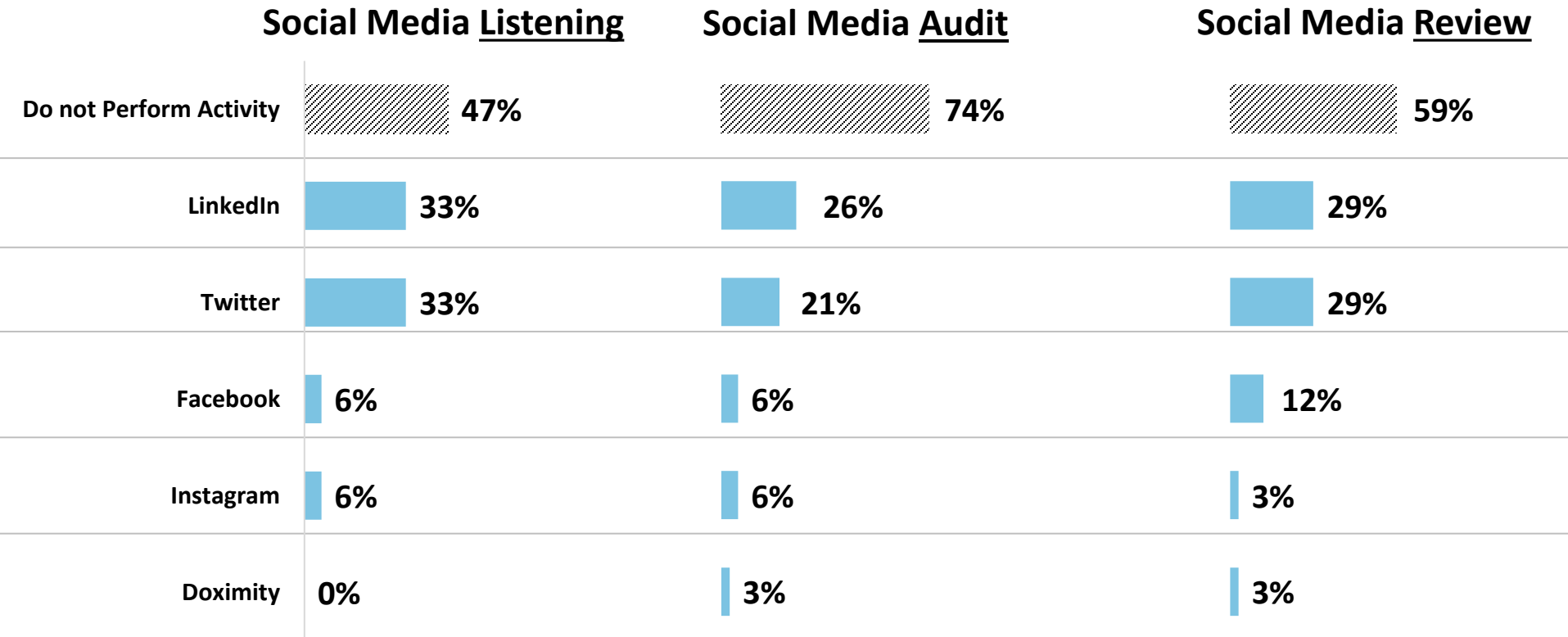


N=47

11) Which of the following goals are priorities for your Medical Affairs group's Social Media efforts?

Social Listening – Audit – Review: Medical focuses its social listening, audit and review activities primarily on LinkedIn and Twitter

Medical's Omnichannel Activities for Social Media

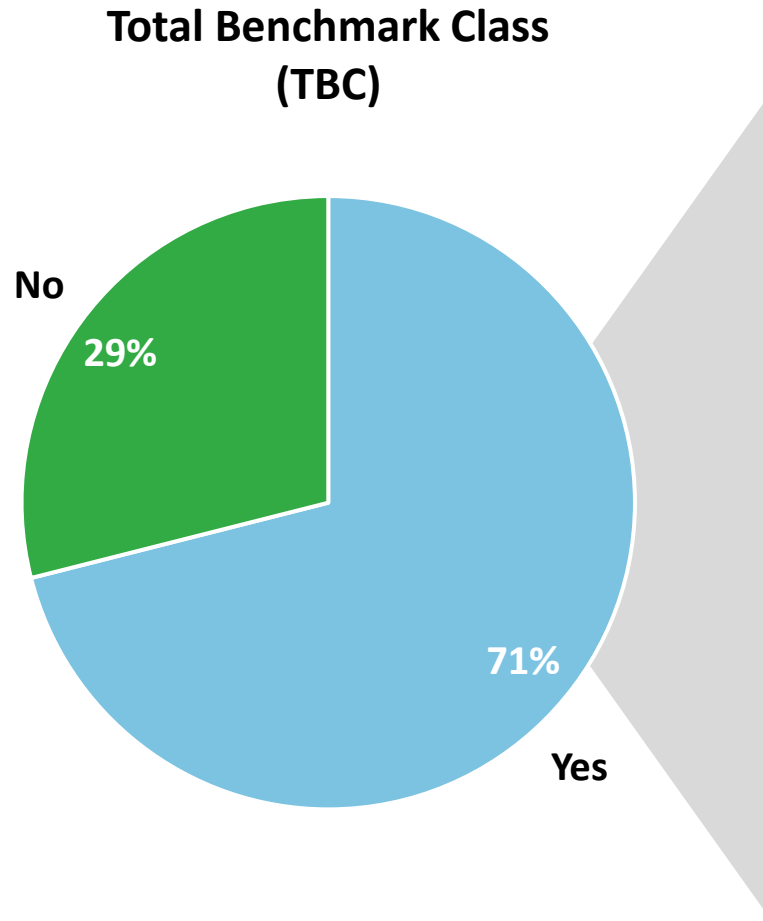


N=36

14) Please select the platforms on which Medical performs the following activities as part of the organization's overall Omnichannel engagement strategy (You may select more than one platform for each activity)

Medical Legal Review of Social: Nearly three quarters of companies employ a medical legal review committee to examine social content for compliance

Social Media Medical Legal/Compliance Team



Compliance Issues

"Compliance doesn't want us to really do anything on social media, but the way we overcome any hurdle is to show how what we are trying to do replicates an existing process or demonstrate how by not doing something we increase the risk of something."

- **Director US Medical Customer Experience**

"No clear FDA guidance, still developing our internal standards and concerns around individuals pushing social posting without clear guardrails being developed"

- **Sr Dir Medical Governance**

"The general lack of guidelines on what could be considered promotional and what is purely scientific exchange"

- **Senior Manager Scientific Communications**

N=38

19) Does your organization have in place a committee specifically tasked with reviewing social media content from a Medical compliance lens?

Activity Effectiveness by Target Audience: Posting disease state information dominates all groups, while EU tends to be very conservative sharing clinical data

Proactive Social Media Activities for Medical

	Global (N=27)	U.S. Only (N=9)	Europe Only (N=5)
Posting therapeutic/ disease state information	 67% N=18	 89% N=8	 100% N=5
Posting information on new scientific papers/ abstracts	 52% N=14	 44% N=4	 20% N=1
Sharing posts from KOLs/ DOLs/ thought leaders	 26% N=7	 33% N=3	 40% N=2
Posting on-label clinical study data	 26% N=7	 22% N=2	0% N=0
Sharing commentary from community groups	 19% N=5	0% N=0	 40% N=2
Posting clinical study data for a new/ expanded indication	 15% N=4	 22% N=2	0% N=0
Sharing industry commentary	 11% N=7	0% N=0	 20% N=1

13) Proactive Social Media Activities for Medical: Please select the proactive activities below which your Medical Affairs group performs through its social media accounts (Please select all that apply)



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