



Landscape

Current (tactical) and future (strategic) profile
of competitors' activities

Usually spanning 4-8 weeks



Case Study: Global R&D Incentives

What	Our client required a comprehensive analysis of R&D incentives internationally, including incentives their competitors had benefited from over the last five-year period. Areas of interest included the USA, EU, and South-East Asian Countries.
Why	Our client desired clarity on its future R&D investments and a comprehensive description of competitors' activities in this area to inform their strategic decisions.
Where	Global
How	<p>Dig Worldwide's researchers contacted government officials, investors, and key stakeholders in the countries of interest to assess the potential incentives that could benefit R&D companies.</p> <p>Primary intelligence interviews with current and former employees of the target companies garnered market insights, including how competitors were leveraging R&D incentives to their benefit. The primary intelligence was supported by a deep search of the secondary domain which identified the major grants, tax deductions, and tax credits offered to R&D companies in the countries of interest.</p>

USA – State Economic Incentives: Virginia

Virginia

- Virginia offers an R&D tax credit that comprises of a base credit and a supplemental credit that is available only if the total amount of credits for a fiscal year is less than the annual credit cap of \$7.7 million for tax years 2021-2024.



Singapore – Intellectual Property Development Incentive

- Intellectual Property Development Incentive (IPDI) is a concessionary tax rate on a percentage of an entity's qualifying intellectual property (IP) income.



EU Research and Innovation Programme

- Main funding body for R&D in the EU. Current and past programmes are:



Corporation Tax With Patent Box (1/4)

Step 1 - Establish a standard income stream and a relevant IP income stream from trading income:

- Standard income stream = €300k
- Relevant IP income stream = €700k

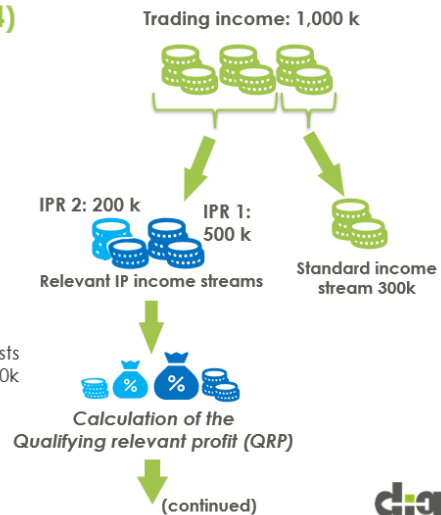
Step 2 - Income for the two sub streams relating to the two intellectual property rights/patents (IPR): IPR1 and IPR2, is allocated:

- Relevant IP income for IPR1 sub stream = 500k
- Relevant IP income for IPR2 sub stream = 200k

Step 3 - Allocate debits to be deducted in arriving at taxable trading profit:

- Deductions for IPR1 sub stream = €100k non-R&D costs
- Deductions for IPR2 sub stream = €50k R&D costs, €50k non-R&D costs

Step 4 - Net profit is reduced by the routine return to arrive at *qualifying relevant profit (QRP)*.
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Case Study: Primary Care Field Force Strategy

Activity in Primary Care Post Pandemic


Partnerships for access

- In June 2021, [redacted] in partnership with [redacted] launched a new emotional wellbeing module to help primary healthcare professionals better support the emotional and psychological needs of people living [redacted]
- The free, online RCN-accredited Continuing Professional Development (CPD) training module, which has been tested and approved by [redacted], aims to help healthcare professionals navigate the emotional challenges people [redacted] in

Face to Face Remains a Priority for [redacted]




Digital Analytics are used in target identification

- Face-to-face is still the focus for [redacted] with digital analytics as a guide to prioritise targets.
- [redacted] that digital supports face-to-face interactions, however building the key relationships cannot be replaced by a digital solution.
 - "...we have 80 reps in the field, and we all adopt a face-to-face first approach... I'm pretty much back face-to-face following COVID-19..."
 - "...along with awareness campaigns, webinars are our main digital tool...digital helps with the reach of the audience..."
 - "...they want us to be face-to-face with pretty much everyone...they feel that's the way the IBU (International Business Unit) want us to go..."
 - "...they want us to be face-to-face with pretty much everyone, however if I need to have that conversation with a key opinion leader in another area, I suggest we meet in Teams... it's a wonderful function that we tap into to..."



[redacted] positioning themselves as a partner


Supportive partnership within the NHS is key to gaining access

[redacted] see a shifting landscape for building relationships with physicians as a key opportunity. Before, the reputation of industry was in question and now there is a shift towards closer partnerships with HCPs and efforts for [redacted] to gain trust as a supportive partner to the NHS.

[redacted] view that building a trusting relationship offering support and education to key influential decision makers will help them leverage a network effect with the aim to encourage HCPs to standardize a method to identify high-risk patients and bring [redacted] treatment earlier in the treatment pathway and opening a greater number of patients.

[redacted] are meeting this opportunity with smaller field forces and a greater strategic pinpointing of targets, a greater focus on a partnership with an 'impartial' medical team over 'key selling messages' from commercial.



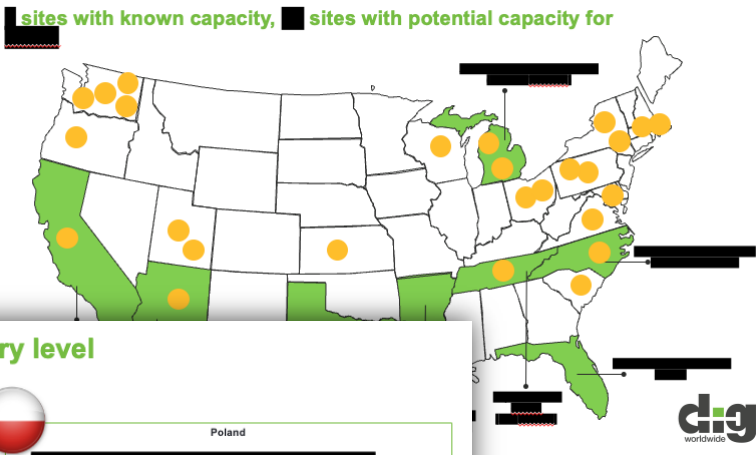
What	Our client was developing their UK human resources strategy in a post-Covid landscape and required intelligence as to how competitors were facing this challenge. Dig Worldwide delivered a birds-eye-view vision of how field forces had changed since the Covid pandemic and how they continued to adapt in response to changes in the market.
Why	Our client was benchmarking their primary care field force against a set of key competitors to develop its strategy for the UK. As a result, intelligence about industry trends and specific tactical insights was required.
Where	UK
How	Dig conducted primary intelligence across 5 competitors to obtain information on the size of their primary care field forces in the UK as well as questions investigating key strategies following the Covid pandemic. Dig investigated how team structures varied across the class of competitors and to what extent digital technologies were being adopted.



Case Study: Oncology Clinical Trial Analysis

US: [REDACTED] mapping of patient recruitment

Site	Status	Accrual	Commentary (Investigators/CT coordinators)	PI
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	⌛	■	[REDACTED]	[REDACTED]
[REDACTED]	⌛	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]
[REDACTED]	👤	■	[REDACTED]	[REDACTED]



Key takeaways at country level

UK

[REDACTED]

Onboard UK sites in Q3'23

Poland

[REDACTED]

in addition to Poland for late-stage trials

France

[REDACTED]

Bureaucratic red tape hinders quick recruitment

Spain

[REDACTED]

Potential 'efficient' country for [REDACTED] sites

What	Dig Worldwide provided tactical insights based on intelligence gathering across three major competitor trials in an oncology indication. Intelligence covered the clinical trial continuum, from site set up to data read out, in 250 clinical trial sites.
Why	Our client was launching a clinical trial in an oncology indication where the therapy area was changing rapidly, and clinical trial data was sometimes out of date by the time of read out. They sought support from Dig to uncover insight into how to launch a global clinical trial program as quickly and efficiently as possible.
Where	US, Canada, Japan, UK, France, Spain, Netherlands, Italy, Germany and Poland
How	Dig carried out primary intelligence gathering across 10 countries. This included all sites for the three target clinical trials. Dig collated site specific and country specific tactical insights for a clinical trial programme launch.



Case Study: Corporate Branding Deep Dive

The [redacted] channel continues to support the [redacted] strategy and amplifies its reach by sharing messaging with the other main Twitter corporate accounts

Just 153 Twitter users follow ALL these accounts, meaning each [redacted] access to a discrete audience

Each account engages with content from the other, meaning that a piece of content is shared across different stakeholder groups. Please refer to slides 49-51 for more detail

MESSAGING

Observance days and disease awareness content is a well-used vehicle for [redacted] broaden the scope of health and wellness issues that the company can "solve"

Type of diseases & lifestyle related issues covered in [redacted]

Sport injury	Inflammatory Bowel Disease (IBD)	Stress/mental health	Sleep
[redacted]	[redacted]	[redacted]	[redacted]

RECENT KEY EVENTS

In 2022 the focus shifted from the [redacted] to its business segments including its [redacted]

Q4 2021 Q1 2022 Q2 2022 Q3 2022 Q4 2022

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Source: Dig Worldwide bi-weekly, quarterly trading, recent news - October 2020 - May 2023

What	Dig Worldwide presented deep dive investigations into the corporate brand for three distinct competitor brands. The deep dives were segmented into positioning, messaging, partnerships, campaigns, communication channels and earned media.
Why	Our client required intelligence about how corporate brands were adapting and contributing to changes in communication across the industry. The reports were fed into the client's internal game-storming sessions to support the development of its own global brand strategy.
Where	Global
How	Dig conducted research across a range of media to identify key trends and patterns in how brand messaging was presented. Dig analysed the data for insights into how this related to the overall company strategy, which in turn generated insights into the competitors' brand messaging and strategy.