



Snapshot

Single intelligence need,
often required quickly

Usually takes place over 1-2 days



Case Study: Competitor Launch Strategy

KIQs and Methodology

Key Intelligence Topics

- [redacted] of 'best in class' patient service offerings;
- Level of [redacted] service infrastructure for [redacted]
- An update on [redacted] ability to action/fund the commercialization of [redacted]
- [redacted] differentiators that would shift doctors' prescribing behaviour



[redacted] of 'best in class' patient service offerings

Sources have [redacted] will offer similar services

- Patient Support Services:
 - One to one dedicated patient support
 - Financial assistance for patients and copay assistance
 - Access and reimbursement support
 - Product and disease patient education
 - Quick start programs



[redacted] team has already engaged payors

Ease of Transition



▪ " 'Best-in-class' efforts will be in making the transition for the existing patients as seamless and invisible as possible at the provider and payor levels - moving them [redacted] another with no changes to copay or reimbursement for the patient" **Investment Analyst, U.S.**

Payor Adoption



▪ "We have been getting our ducks in a row with payors for over the last year...we don't foresee any major issues with reimbursement, but payors will need to work through their processes and this may take a few months after launch" **Senior Executive, [redacted]**



What

Our client required intelligence on an anticipated product launch. Dig Worldwide was able to obtain intelligence on patient access programmes, marketing approach and launch timelines.

Why

An emerging product was entering the market from a small competitor without a large product line. The product competed with our client's product and threatened to take market share after launch. The intelligence Dig gathered enabled our client to develop its defensive strategy.

Where

US

How

Dig conducted primary intelligence via interviews with individuals in the competitor sales force and head office to obtain clarification of key hypotheses on launch strategy.





Case Study: Emerging Markets Vaccine Strategy

Key Learnings

- 1 [redacted] are a strategic [redacted] are promoted through health economics educational campaigns and regional sponsored studies.
- 2 [redacted] is strategically important [redacted]
- 3 [redacted] has excess capacity for vaccine production and is increasing its capacity for [redacted]
- 4 [redacted] emerging markets with the largest populations. [redacted] is its #1 priority market, however this will be replaced [redacted]
- 5 [redacted] is produced in its [redacted] and sources estimate [redacted] out by 2027.
- 6 There is [redacted]



What	Dig Worldwide produced a report outlining our client's key competitor's strategy, manufacturing capacity and production rates for a portfolio of vaccine products. The report provided insight into the regions under threat from the competitor and details of its localisation plans in each region.
Why	Our client noticed threats to its market share in specific emerging markets and required a deeper understanding of its key competitor's plans and capacity to launch in these key markets. Our insights fed into the global strategy for the product area.
Where	LATAM, APAC, MENA, South Africa
How	Dig conducted primary intelligence research into the competitor's HQ as well as decision makers in the competitor's regional satellites to understand and uncover the competitor's strategy and production and manufacturing capacity. Primary intelligence research was also conducted with policy maker sources in key regions.



Case Study: Corporate B2B Social Media Strategy

WHAT HAS GONE WELL / IS WORKING?

is utilizing its b2b platforms to drive trade engagement

- “...we've used social media and the website to help increase sales by supporting retailers who can order branded point of sale units and displays to help market products clearly through [redacted] Sales Director, [redacted]
- Recipe section of [redacted] platform is driving traffic to the website: “...this is happening through Pinterest and Instagram... there is competition among young aspiring chefs and we provide a platform for them to be featured... there's high engagement as well as helping to drive innovation...” Marketing Manager [redacted]
- [redacted] give away packs with merchandising featured across social: “...we did this to inject some additional enthusiasm to help caterers after Covid and it resulted in [redacted]

WHAT WOULD YOU DO DIFFERENTLY / ISN'T WORKING?

Retailer data and multi-brand campaign overload

- Drive away [redacted] have a high Business...

- Educating the retailers to plan earlier for [redacted] and all year-round relevance of our iconic brands : “...we had a situation with Covid where some convenience stores had sold out of [redacted] so this year we are heavily promoting [redacted] ... we have already started the social media marketing activity taking place to raise awareness among retailers of the full [redacted] portfolio...” Marketing Manager EMEA, [redacted]
- The speed of incorporating new categories and acquisitions: “...we have been on an acquisition trail for the past few years so making sure grocers and trade [redacted] with all the new product formats has [redacted] Operations Manager, [redacted]



WHAT NEXT?

Digital precision marketing and brand positioning – China and India principal geographic focus

- The future is focused precision marketing: “... the future is all about how we execute precision marketing as part of the overall digital marketing excellence plan... in b2b social we will be optimizing our editorial plans, ensuring we are using the best channels especially in emerging markets where we have used retail social influencers in China and India ...” Channel Operations Manager, [redacted]
- Digital will be at the forefront of new categories and acquisitions: “...we are adding categories at pace like [redacted] and digital will be our primary means of helping to reposition the acquired brands as everyday luxuries, in the minds of consumers and trade...” Marketing Manager EMEA, [redacted]



What

Our client, a major global corporation, was undergoing a transformational initiative to digitize its B2B operations. It wanted to investigate the feasibility of building a cross-platform social media presence to support its communication strategy.

Our client needed to understand its main competitors' actual B2B strategies to define which social media platforms offered the most appropriate format for communications and how those audiences should be engaged.

Why

Our client was still communicating with its B2B clients via email and surmised that they were lagging behind main competitors in the B2B social media space. Acknowledging the escalating influence of these platforms within the market, they aimed to construct an effective B2B social media strategy of their own.

Where

Global

How

Dig Worldwide conducted stakeholder interviews with relevant stakeholders in charge of B2B social accounts within and outside the competitor set. The objective was to obtain detailed primary intelligence leading to rich human insights about which methods were most effective.





Case Study: Competitor Commercial Strategy

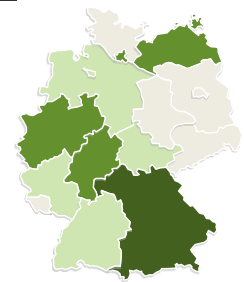
Web Traffic

- Data Source: [REDACTED]
- Organic traffic numbers are strongest for [REDACTED] which has averaged 12,089 visits per month over the last 18 months.
- However, whilst organic traffic to [REDACTED] is lower, at 7,512 per month, the site's overall traffic volumes have been significantly boosted through campaigns, which had added an average of 12,204 visits per month.
- [REDACTED] numbers are low but were steadily building until March 2023 until they began to drop off.
- (Note the different values on the Y axes of these charts.)
- TOTAL TRAFFIC: Estimated number of visits the domain receives in a month.



Field Teams

Oncology Field Sales Distribution in Germany



- Sales**
- [REDACTED] sales team structure in Germany consists of three functions:
 - National Sales Directors - There are seven national sales directors that either operate across the whole of Germany or are split North vs. South.
 - Regional Sales Managers - There are [REDACTED] in total with just one dedicated to oncology [REDACTED]
 - Field Sales Reps - There are [REDACTED] consisting of a range of roles, seniorities and disciplines. There are [REDACTED] based mostly in the south of the country
- MSLs**
- There are approximately 35 MSLs in total across all products
 - Around 28 of these cover [REDACTED] team



Symposia, Congress

- From 2019 to 2021 [REDACTED] meaning [REDACTED]
- The proportion of its budget spent on [REDACTED] although not as much as [REDACTED] secured the lion's share

Summary of Investments in Third Party Events	2019	2020	2021
Total Investments – all events / therapeutic areas	[REDACTED]	[REDACTED]	[REDACTED]
Total Investments in Oncology-related events	[REDACTED]	[REDACTED]	[REDACTED]
Percentage of total third-party event budget devoted to Oncology	[REDACTED]	[REDACTED]	[REDACTED]
Total Investments in [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Percentage of total third-party event budget devoted to [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]



What

Our client wanted to review the national commercial activities and strategy of its main competitor within a specific oncology indication. This included a review of its promotional activities online via its website and its attendance/sponsorship of congresses within the country.

Our client also wanted to review its competitors field force and resources, including how its sales force is structured and organized, its focus/priority of certain products and indications and its activities with medical professionals.

Why

Our client was reviewing its national sales strategy and wanted to use its main competitor and market leader within the country as a benchmark. This would allow them to deploy sufficient coverage both online and in their field teams and identify opportunities where they can overtake their competitor.

Where

Germany

How

Dig Worldwide contacted a range of sources via telephone to gain primary intelligence insights using a German-speaking research team. This included internal sources within the competitor and HCPs. Dig also contracted German analysts who deployed a range of digital desk research techniques and tools to find all relevant mentions of the competitor and its recent activities across all open media and digital news platforms.





Case Study: Functional Food Ingredients Partnership Strategy

Japan

Company Name	Company Address	Company Address (English)	Country	City	Phone	URL	Company Overview	Innovative Products Overview	What Are Products Used In?	Current Sales Outside of Home Market
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Manufacturer and seller of food ingredients and functional food materials. Imports and sells organic fertilizers and feeds	- Lactobacillus (17 species derived from Kimchi and Maccoli) - Green Tea-derived Enzyme-treated Polysaccharide - Glucosamine (derived from shrimp) - Chondroitin 30%, 40% - Shark cartilage extract - Royal jelly powder - Blueberry extract powder - CLA (Conjugated Linoleic Acid) - L-Carnitine / L-Carnitine fumarate - Fucoidan - Ginseng Material: Organically Cultivated Red Ginseng, Koryo Red Ginseng, Fermented Red Ginseng - Jiaogulan Extract Powder - Akeshisou Extract Powder	- Functional - South health foods Korea - Protein powder additive - lactobacillus - Ginseng: tea, energy drink - Jiaogulan and Akeshisou are additives for diet foods	

Japan

Company Name	Company Address	Company Address (English)	Country	City	Phone	URL	Company Overview	Innovative Products Overview	What Are Products Used In?	Current Sales Outside of Home Market
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Venture company that develops biotech products such as the organogermanium compound Ge-132P and spirulina for use in supplements and foods, as well as cosmetics	- Spirulina (algae), including Fourousou, a deep water ocean spirulina - Patented manufacturing method to obtain an organogermanium compound from algae with a purity of 99.9%	Used as supplements and ingredients in health foods and drinks. Spirulina is similar to seaweed and can be taken as a dietary supplement due to containing a number of nutrients (amino acids, minerals, vitamins, fibre, nucleic acid). Natural pigments (phycoerythrin) from Spirulina is used as a natural colouring (blue and yellow) agent for ice creams, sugar coatings, gums, powdered juice, noodles, wasabi paste, jelly, frozen confectionary	- Started overseas deployment in Europe and US in 2004. Resellers in Vietnam, Cambodia, Taiwan, Singapore, Hong Kong, Mongolia

South Korea

Company Name	Company Address	Company Address (English)	Country	City	Phone	URL	Company Overview	Innovative Products Overview	What Are Products Used In?	Current Sales Outside of Home Market
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Worldway produces high purity silk amino acids into various food and health products	- Silk amino acids - Silk tyrosine - Silk sericin - Silq Ever Slim Shake - Zaoun Silk Hydrogel Mask - Zaoun Silk Retox Serum - Zaoun Papira Memory Cream - Zaoun Skin Care Set - Shine Skin Care Set	Health foods and cosmetics	Exports overseas. Facilities in Africa, South America, US and APAC.



What

Our client, a global producer and developer of functional ingredients for food, pharmaceuticals, and animal feed, required a search for partnership opportunities with growing innovative companies in Japan and Korea developing functional ingredients aligned with our client's portfolio.

Why

To provide actionable intelligence to expand its innovative functional ingredient product portfolio and bring cutting-edge ingredient research and product development to the global market.

Where

Japan, Korea

How

Using Dig Worldwide's Japanese and Korean language expertise, research was completed through a scan of the secondary domain and gaps in actionable intelligence were filled with primary research on an as-needed basis.

Dig identified 65 partnership opportunities with ingredients ranging from sustainable animal product alternatives such as culture-based meat and other plant-based meat, egg and dairy substitutes, to functional health ingredients from a range of plant species, and innovative food processing ingredients such as temperature responsive gels and plant-based preservatives to improve product longevity and texture.

