

Connecting the DATA DOTS

As target audiences multiply and technology continues to evolve, market research teams are making the transition from crunching numbers to providing invaluable insights for guiding the decision-making processes of life-sciences organizations.



LINDA HARRELL Daiichi Sankyo Inc.

"Truly innovative companies do an amazing job of following cultural trends and buyer behavior, and then predicting what products and services customers will want in the future."

Experts at Best Practices note that the current uncertain global economy has accentuated life-sciences executives' need for powerful market insights to gain an edge over competitors. These companies are increasingly challenged to transform their market research departments from backward-looking support-service technicians into forward-looking, valued business advisors who support growth, brand development, and long-term economic health.

Thought leaders agree that the rapid, sustained evolution of technology is a key element enabling this transformation. Ian Crassweller, director, market research, at UCB, observes that technology and innovation have always been central elements of successful market research organizations.

"The inquisitive and analytical nature that is central to successful market research seems to lend itself to technology advancements," Mr. Crassweller says. "Recent technology trends impact the discipline of market research in many ways, but I would highlight the impact they are having on expanding our research options, enhancing the speed and analytical power of research, and challenging our commitment to training and development."

Elizabeth Jeffords, senior director for strategic pricing and contracting management at Genentech, observes that technology is no longer an optional convenience, but an essential element of the market research process, not just in conducting online panels and individual surveys, but in reviewing the data obtained.

"One technology we take for granted today is data mining and reporting software," she says. "In the old days we had to comb through thousands of pages of cross-tabs to come up with one chart; now it can be done at the touch of a key-stroke. We now spend less time analyzing the data and more time providing insights into what the data mean for our brands."

Michele Fuller, global head, marketing sciences, for Alcon, says technology is changing not only the way data are collected, but also

how the market research function enables decision-making within the overall life-sciences organization.

"Gone are the days of simple primary vs. secondary and/or qualitative vs. quantitative research," Ms. Fuller says. "Research departments are being challenged to move beyond the voice of the customer or the insights consultant toward providing a more holistic line of sight to the organization."

According to Ms. Fuller, the significant proliferation of data and information enabled by new technologies will eventually represent a continuous flow of knowledge, and marketing and business analytics functions are expanding to accommodate this explosion of data.

"More interdependency between verticals — business analytics, forecasting, competitive intelligence, and market research — will be required than ever before," she adds.

Focus on Mobility

Recent advances in technology, such as online and mobile tools, have been of particular benefit in fielding market-research studies. Linda Harrell, senior director, market research and planning, Daiichi Sankyo, notes that technology allows researchers to greatly reduce the time it takes to field a study, as well as enabling a greater geographical reach to assure that the study sample is truly representative.

"Technology also provides customers with the flexibility to provide input at the time and place most convenient and relevant to them," Ms. Harrell says. "For example, customers can respond at halftime at their child's basketball game, or while on an international flight."

The evolution and proliferation of mobile technology are further transforming market research. Bhavani Moodabagil, senior manager, marketing research, neuroscience, Lundbeck, cites the development of handheld devices such as smartphones and tablet computers as having significantly impacted market research by greatly increasing the possibilities for capturing data.

Mobile Market Research App

The Research Partnership, a full-service global market research company with headquarters in London and offices in Philadelphia and Singapore, demonstrated its smartphone app market research tool at last month's Pharma Market Research Conference in Parsippany, N.J. The app, which is still in development, can be used to understand physician prescription decisions taken for individual patients qualitatively and in real time by using a mobile phone. The tool is currently being tested in a real market research setting, and a paper outlining the results of one trial study is being presented at the EphMRA conference in Paris later this year.

For more information, visit researchpartnership.com.



MICHELE FULLER
Alcon

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"As companies increasingly use iPads for detailing to physicians, the iPad becomes a useful vehicle for message and detail testing," Ms. Moodabagil notes. "These tools are also proving useful at medical meetings for short studies, discussions, and recruiting. One caveat is not to overuse these tools, especially in cases where the focus of the discussion can get lost if the respondent is too engaged in the tool."

Mr. Crassweller notes that while life-sciences market researchers have long been using the Internet for primary research surveys, tools like online communities and remote one-to-one and group interviews are emerging beyond their initial developmental stages to offer faster, more cost-efficient ways to speak with customers, especially those in harder-to-reach audiences.

In fact, Megan Morrison, senior analyst of primary market research, Takeda Pharmaceuticals U.S.A. (TPUSA), believes that Web-enabled phone qualitative research has improved so drastically in recent years that it could be argued that the experience trumps that of in-person research.

"With Web-enabled research, the respondent pool becomes the nation as opposed to selected cities, leading to better targeting and more diversity in the respondent pool," Ms. Morrison explains. "The platforms enable respondents to view a multitude of multimedia stimuli and provide detailed feedback by means of interactive markup tools. The benefit to the client side exists in the form of viewing these interactions live, while spending less time and money than the traditional in-person model."

Fitting the Social Media Piece

The continued integration of social media into the daily lives of individuals throughout the world remains a conundrum for many life-sciences companies. Given the highly regulated environment in which they operate, most companies have been reluctant to do more than establish a surface presence within the social-media sphere.

According to Ms. Fuller, legal and regulatory challenges relating to adverse event reporting, as well as privacy issues with observational research and data mining, have left the life-sciences industry somewhat behind the curve with respect to developing best practices within social media outlets.

"Some research firms are looking at the use of social media in predictive analytics within the pharma space, with encouraging results," she notes. "Developing foresight capacity for scenario planning is an area of high unmet need in our space."

Mr. Crassweller believes social media has the potential to help researchers obtain a swift understanding of customer opinions and trends, as long as its use is approached carefully and responsibly.

"We are seeing the availability of more complex data streams, and the data we have been using for some time are becoming easier to access and analyze," he says. "These are just a few examples, but in all cases the technology behind these trends is allowing us to do more and to do it faster."

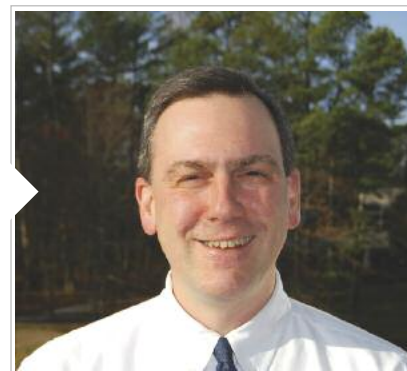
"The influence of social media and technology is moving market research beyond asking and observing techniques to co-creation and anticipatory techniques," Ms. Fuller says. "Our function will need to evolve to synthesize and socialize these data within our organizations."

"Building awareness throughout the organization about the capability, getting cross-brands and cross-functional personnel actively involved, and providing periodic updates are vital to ensure that we make the most of the data coming from social media outlets," says Jocelyn Trokenheim, senior director of business insights and strategy, TPUSA.

When looking at more specific applications, Ms. Harrell identifies patient compliance as one area where social media can provide market researchers with valuable data to help them identify the unspoken, hidden reasons why patients do not take medications as prescribed.

"For example, many patients don't engage honestly with their physicians or respond to market research in a totally honest way," she explains. "There is a fear of judgment, lack of time in the office, embarrassment, etc. The non-confrontational aspect of social media, since it's often non-live and has no face-to-face interaction, creates a comfort zone. In the anonymity of cyberspace, it's easier for a patient to discuss why they might be failing to adhere to a treatment plan or not listening to their doctor's recommendations."

"If the healthcare industry uses social media to ask the right questions, and really listens to



IAN CRASSWELLER UCB

the answers received, it will be able to create innovative ways to get past those barriers and better meet patient needs," Ms. Harrell says.

Ms. Jeffords cites use of digital "clipping services" as another way in which companies can use social media to keep track of all the on-line discussion on the company or its brands.

"There are also more robust services that not only clip the mentions, but then text mine the chatter to look for trends," she says. "To ensure that companies know the true buzz about their products, a clipping/mining service is critical not only for social media, but also where possible for live conversations between physicians and patients, which will always be important."

Even when simply mining for mentions, Ms. Moodabagil cautions that social media remains an emerging resource requiring continual evaluation and careful review in terms of data obtained.

"Because most of these social media are for and used by patients and caregivers, understanding their needs and gaps is very important for overall brand strategy," she says. "Monitoring various blogs, forums, and special group chat rooms on specific topics can provide companies with interesting information, but it is important to understand the issues and to know the context for what is being said."

Forward-Looking Partners

Ms. Jeffords, who in addition to her role at Genentech serves as VP of the Pharmaceutical Marketing Research Group's 2012 executive committee, says the trend PMRG has dubbed Market Research 2.0 will be one of the group's main areas of focus for 2013, helping market researchers continue their evolution into strategic thought partners, as well as helping the industry shape itself to be more focused on insight than data.

"In these days where countless market research jobs have been lost across the industry, it's never been more important for market researchers to reinvent themselves into thought



MEGAN MORRISON
Takeda Pharmaceuticals

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partners," Ms. Jeffords says. "Highly valued researchers have to know their brands from the inside out, from clinical data to the ROI on programs; they have to be savvy presenters with strong influence skills; and they have to know their market, their competitors, and their audiences better than they know themselves. And to do all that, they need to be savvy about how and when to use the latest tools."

Alcon's Ms. Fuller, who is a member of PMRG's 2012 board, notes that many market

research groups are focusing their hiring efforts less on technical skills, and more on consulting and leadership skills.

"Increased training on conceptual thinking, leadership, and creative communication skills is required for market researchers to better inform integrated forward-looking strategies within organizations," she says.

Mr. Crassweller thinks that in addition to bringing forward deep, real, and sustaining insights into customers, markets, and com-

VIEWPOINTS



TRACY SINATRA

Senior Director,
Quantitative and
Syndicated Market
Research
Campbell Alliance

Global Reach

The ability to conduct research online has expanded the ability to quickly reach a wide variety of respondents throughout the world. Faster response times allow for more actionable information, allowing companies to better understand how their products are performing globally. Companies are increasingly relying on technology to expand research audiences, with a growing focus on a greater array of healthcare providers, payers, and consumers. Technology advances are allowing for a more seamless integration of data, ultimately allowing companies to make more timely, informed decisions.

A Strategic Partner

Well-designed market research reduces inherent risks and uncertainties in decision-making. It is best when market research is included as an early strategic partner to recommend a systematic, objective, and analytical approach to the business issues in question. Outputs should then provide relevant information, insightful conclusions, and actionable recommendations as opposed to lengthy pages of tables, statistics, and comments that describe what is self-evident.



DONNA KELLY, PH.D.

Managing Director
GfK HealthCare (U.S.)

Smart Surveying

Collecting data via mobile phone enables the capture of

"in-the-moment" reactions that online surveys don't offer, which provides a different type of data. Mobile phones, including smartphones, are becoming ubiquitous and are therefore an important research platform we need to use more frequently. GfK surveys conducted in Europe show that smartphone purchases increased by 67% in 2011. Among our own physician panel, we see the percentage of M.D.s taking surveys by smartphone up by 36% in just the last year.



JULIE STAFFORD, PH.D.

Principal
Hygeia Consulting Group

The System is the Customer

We are entering a new era in

which the individual physician is no longer the primary decision-maker for generating prescriptions. Increasingly, the customer is an integrated system where the distinction between provider and payer is blurred. Market research needs to lead the way in understanding the needs of this new customer. We need to look beyond the physician to the system of care and how quality and cost, not only safety and efficacy, drive behavior.



THOMAS DRAIME

Client Services Director
Insight Health US

Research Oversight

Just as conducting market research has shifted to more

online and Web-enabled formats, other formats for collecting research data have expanded and require more monitoring and consideration. Market Research Online Communities is one way to monitor and guide discussion in a particular subject, but with the prevalent use of Facebook, Twitter, and other social media platforms, companies must consider how best to monitor and take action on discussion and comments shared in nonrequested platforms.



BRAD DAVIDSON, PH.D.

General Manager
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New Media KOLs

The identification of and opportunity to work with new media KOLs (or eKOLs) is a must-first step toward understanding social media. AE reporting concerns scare off many brand and legal teams from studying this space; however, relying on computational linguistics, data can be captured easily and safely. With latent semantic analysis, we can identify where important conversations are taking place and the eKOLs participating in these virtual conversations.

"The unbiased interpretation from the market research team enables all levels of brand management to make informed decisions with clear insights."

petitors, market research best demonstrates its value by identifying and defining its future.

"Market research adds incremental value when we focus more on helping the organization see tomorrow's business," he says. "I think we increase our value to the organization when we find a way to communicate our work clearly and deeply to the organization, and that includes finding a way to financially quantify the impact of our work on the business."

According to Ms. Moodabagil, brand teams

need the unbiased interpretation of data that market research provides to clearly understand what's happening in the marketplace, not only with a particular brand, but with competitive brands.

"The market research function provides an independent perspective to advance overall brand health, but with no vested interest in any particular program," she explains. "This unbiased interpretation enables brand management to make informed decisions with



BHAVANI MOODABAGIL Lundbeck

Quantitative vs. Qualitative

Because budgets are shrinking, there is a lot of pressure to forego qualitative research and get larger "n" numbers quickly with quantitative surveys. The challenge becomes interpreting the data from the surveys; without insight into the how and why, the answers to "what" are difficult to interpret. Qualitative research tends to have more stable findings, as well. Quantitative research results are often outdated much more quickly. It is important to use both.



KELLY D. MYERS

CEO

Qforma

Mapping Behavior

There is a surge in the use of new tools, including social media by providers — from healthcare systems to physicians and patients. This shift is having an impact on physician practice patterns because of peer network interactions and immediate access to new channels. Market research needs to peel away the noise through the use of advanced analytics to deliver more relevant market insights, including the ability to map emerging changes and predict where change will spread next.



AL REICHG

Chief Commercial Officer

Qforma

Leveraging Technology

Robust market research is incredibly important, but the value brought forth is dependent upon the

readiness to leverage better technologies and methodologies. In other words, the willingness to innovate and partner to fill the gaps will be the difference between delivering significant value and delivering typical research to an organization. With our healthcare system in a heightened state of flux, market research capabilities are being scrutinized in most organizations.



ANNE BRUMBAUGH, PH.D.

Partner and Chief Analytics

Officer

Qintuit

Pragmatic Strategies

To maximize its value, market research must be linked to actionable strategy. RFPs should be crafted with strategic opportunities and operational limitations in mind: are we willing and able to act on the proposed research? Methodologies should be designed to address key strategic questions: which methodology will yield the best insights and be most likely to help us achieve our goals? Reports should identify and articulate feasible actions and likely consequences: what are the strategic implications for our business, our tactical options, and their expected outcomes? Without grounding in pragmatic strategic thinking, market research too often fails to deliver its promised value.



CHRIS DEANGELIS

VP, Sales

SSI

The Power of Technology

Internet survey and research

technology become more powerful every day. Virtual reality shopping and streaming video quality have never been better. Wireless devices allow us to reach today's on-the-go consumers, wherever they are. Additionally, social media and crowdsourced feedback from blogs and other continuous feeds are allowing us to gather and exchange ideas in real time from thousands of people across the globe. We now have an unprecedented number and breadth of sources allowing us to ask questions and listen to the voice of the customer with an immediacy, frequency, and depth never before possible.

The Business of Strategic Insights

Today's researchers are active providers of insights and guidance that have a direct and positive impact on business results. To optimize our value to the organizations we support, we should be fully engaged in delivering better business outcomes. We should embrace pay for performance models. In today's world, we can stitch together an eclectic range of information involving continuous feeds like blogs, online communities, and mobile surveys with traditional questionnaires. We have the knowledge to balance and control a full spectrum of sources — from panels to social media — to access the people we need and to measure consumer reactions, opinions, and feedback both accurately and consistently.



ELIZABETH JEFFORDS
Genentech Inc.

"To ensure that companies know the true buzz about their products, a clipping/mining service is critical not only for social media, but also where possible for live conversations between physicians and patients, which will always be important."

clear insights. Providing not only the complete story of the brand but also identifying implications of what needs to be done to impact the business is key."

According to Ms. Harrell, another added value provided by market research is that it enables understanding of the underlying beliefs and values driving a customer's behavior, a function she calls customer intimacy.

"Truly innovative companies do an amazing job of following cultural trends and buyer behavior, and then predicting what products and services customers will want in the future," she says. "When organizations can align on a smaller number of metrics where the correlation to performance is well-established, they can spend more time on customer intimacy."

TPUSA's Ms. Morrison agrees that the market research function should continue moving beyond number crunching and focus on establishing a broader collaboration with the overall organization that helps all players gain a deeper understanding of the business issues at hand.

"While collaborative, it is critical to keep in mind the objectivity required of the market research role," she cautions. "By sharing information openly and probing to understand the questions that reside beneath the surface, market research teams can work with their vendors to optimize a methodology that will reveal those deeper insights providing value to the organization."

Ms. Trokenheim describes this strategy as "connecting the dots" to provide the organization with actionable insights.

"Every piece of research we do is a piece of the big puzzle, but only when we put all the pieces together and make connections from all the relevant data sources, can we see the complete picture to help solve the business questions at hand," Ms. Trokenheim says. **PV**



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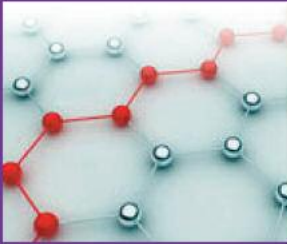
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