

Honing the EDGE

Today's dynamic, competitive marketplace calls for pharma market research groups with forward-thinking, valued business advisors who can provide the kind of robust, complex data analyses that support growth, brand development, and long-term economic health.

"Almost 70% of companies participating in a recent study use a decentralized market research structure, and yet often don't provide training for the skills that make cross-functional decentralized structures work."

Market research, long a key component of success in most pharma operations and strategies, is becoming even more vital as emerging markets, growing payer influence, and data restriction continue reshaping the pharmaceutical industry.

Respondents to the Pharmaceutical Marketing Research Group's (PMRG's) inaugural State of the Industry (SOI) Survey, conducted in collaboration with TGaS Advisors, predict that research spending is likely to rise, especially in global research, given the increasing importance of emerging markets to pharma's future.

Analysis by Best Practices shows the balance of market research opportunities and activities is tilting more toward strategic positioning, putting a premium on innovation and partnership. One market research executive interviewed for a Best Practices study, *The Future of Market Research: Challenges and Changes in a Core Pharmaceutical Functions*, noted that merely providing data without context is no longer enough. "The only way you can be seen as a strategic partner is if you provide interpretation and application of findings," the executive explained. "If you just provide the findings, what have you really added as value?"

The SOI survey results also point to staffing, training, and career paths as major issues for market research groups. According to TGaS Advisors benchmark data, each client-side researcher managed \$1.4 million in spend in 2010, compared with \$850,000 in 2006.

In a presentation at PMRG's Annual National Conference in March, John Kain, VP

VIEWPOINTS



EHR Leads to More Whats than Whys

Medicine is transitioning from paper to electronic health records (EHR). Patient information can be captured, stored, parsed,

aggregated, and managed seamlessly, allowing better and more efficient patient care. Our market research has shown that some physicians are resistant to EHR, others embrace it, saying this technology will revolutionize the practice of medicine. Many payer organizations incentivize physicians based upon outcomes data. Thus, vast outcomes databases are being developed. While these are a goldmine of the "what," market research will increasingly be challenged to understand the detailed "whys" underlying the aggregated data. We market researchers will have more data available, but we will also be asked to answer more difficult questions.

MARITE TALBERGS

Senior VP, Research and Consulting, *GfK HealthCare*



Social Media the Holy Grail of Data

Social media is a firehose of unbiased, unincentivized conversations, the holy grail of qualitative data.

Pharma market researchers can take advantage of these data through social market research, digital ethnography where they can live among their consumers (via Web and mobile), and uncover much deeper insights into the patient journey and

their unmet needs. P&G even views social market research as being more powerful and efficient than traditional survey research.

VINCENT SCHIAVONE

Co-founder and Executive Chairman, *ListenLogic Health*



Multimodal the Mode of the Future

In a multimedia world the keyword for market research is "multimodal." Healthcare professionals now communicate with patients,

payers, and pharma companies through multiple channels including social media platforms, blogs, e-conferences, e-CME and other digital supports. This online mashup influences their behavior and market research needs to adapt to this reality by leveraging new methodologies, including social media monitoring, online focus-groups, mining of virtual communities, or even gaming. Now that the first digital native physicians have begun to Rx, traditional focus groups or face-to-face interviews barely capture how respondents really behave. Multimodal approaches, including a blend of traditional and online methods are becoming the best practice.

HENRY GAZAY

CEO, *Medimix International*



High-Tech and High-Touch

John Naisbitt (Megatrends) made the distinction between "high tech and high touch" and this provides a model for innovative research in

and management advisor at TGaS Advisors and co-leader of the survey, cited one respondent's assertion that "researchers with consulting skills" are critical to a strong market research team in these leaner times.

During a panel discussion of experts responding to the SOI study presentation at PMRG's annual meeting, Amy Marta, principal at ZS Associates, cited the growing importance of managed markets and payer influences in providing valuable insights.

"There is room to improve the number of resources and amount of expertise we as a profession dedicate to managed markets research," Ms. Marta observed.

EMR: A Game Changer

The growing adoption of EMRs and EHR by healthcare practitioners has made available a wealth of de-identified patient data that, according to some industry experts, could

change the way market research is conducted in the pharma space.

According to Peter Simpson, principal at Segmedica, a greater and easier access to patient healthcare information will be a part of ever more detailed patient-journey projects and treatment pattern studies combined with other techniques such as in-office ethnography and simulated physician-patient interactions.

"However, we have a long way to go before EHR is sufficiently widespread to enable us to

changing times. We must better understand the potential for new health technologies, emerging models for healthcare delivery, and new accountability for improved quality and cost-effectiveness. This is high tech. We must equally innovate on the high touch side of the equation by gaining insight into the attitudes and emotions of our customers as they respond to, seek to benefit from, and take an active role in meeting the challenges of reform.

JOSEPH GATTUSO

Executive VP, Chief Strategic Officer,
Ogilvy CommonHealth Worldwide



from cost drivers to medication adherence, as well as the ripple effects on patient quality of life that the new access generates. Healthcare reform yields the opportunity to study pools of market

entrants, their behavior, and the pull-through benefits achieved by system constituents, including physicians, payers, and most importantly, patients.

JODY FISHER

VP, Marketing, *SDI*



via email has become a popular tactic for the pharmaceutical industry. In fact, our metrics show email is the fastest growing channel used to engage and influence physicians and other

practitioners. With open and click-through rates varying widely, the key to success is to deliver a targeted message to the right specialty with a strong value proposition.

DAVE ESCALANTE

VP and General Manager, SK&A & OneKey,
SK&A, A Cegedim Company



Best Practices for Social Media Market Research

When combining market research with social media there are a few best practices to keep in mind. The first is use common

sense. Choose the channels that are appropriate and support the research objectives, not just so you can be seen to be fashionable. Second, be creative. Make the most of what digital technologies offer and exploit their functionality to engage the respondent and increase response rates. And third, automate. Use interactive reporting to deliver information faster and allow the marketing team to carry out their own tailored analysis.

HARRIET KOZAK

U.S. President, *The Research Partnership*



The Internet: the Ideal Medium

Alternative media channels offer us multiple opportunities. First is recruiting and the ability to find consumer respondents. Next is the ability

to conduct research and promote interactions between widely dispersed and small universes including small medical specialties and rare diseases. Then there is the ability to legally and ethically observe consumer communications without them knowing they are observed, eliminating observation bias from the input. The Internet is an ideal medium for accessing teenage patient groups as well as adults and HCPs. There is little now that can be done in-person that cannot be replicated online.

PETER SIMPSON

Principal, *Segmedica*



Build Trust

SSI has done extensive research around new media users and discovered critical best practices for bringing them effectively into the market research process. It

should be noted that even among avid social media users, there is a low level of trust.

Therefore, when using social media, it's important to build trust with respondents. Make sure you use an online research platform that doesn't repeatedly screen people out but gives them a reasonable opportunity to complete surveys and earn the promised rewards. Reach out to respondents in the way they want you to engage with them. Online participants want to be reached through e-mail, because it lets them answer when they want.

We need to bring that same level of convenience to social networks.

CHRIS DEANGELIS

VP, Strategic Initiatives
SSI

The Ripple of Reform

Similar to the onset of Medicare Part D, I expect market researchers and economists to spend time studying access implications for issues

E-mail Leads the Way

With doctors spending about eight hours per week online attending webinars and participating in social forums, targeting them

build representative samples,” he says. “I strongly suspect that early adopters of EHR are skewed toward larger practices and change oriented physicians.”

Technological advances bring human consequences, he says. And research firms will need to be larger on average and well-funded to develop new methodologies and techniques. (To read more about how after years of conservative stagnation healthcare market research is on the threshold of major and unstoppable change, please turn to “Managing Change in Healthcare Market Research.”)

During the PMRG meeting, Simon Fitall of Galileo Analytics presented a realigned method for chart review using EMR data, noting that researchers could prepare a complete analysis of current behaviors, concomitant conditions, and confounding factors from EMR data. Criteria for patient review are then refined with much more clarity around the significant factors derived from the EMR data, Mr. Fitall said.

This allows researchers to focus much more on the “why” than the “what,” giving a much broader scope for information gathered and an opportunity to go deeper into treatment rationale, he added. Also, analysis of the data gathered by the researchers can include comprehensive crosschecking and combination with EMR data; in this way, small anomalies can be placed in context plus covering much broader implications, giving a complete view

of the disease category, Mr. Fitall noted.

Jody Fisher, VP of marketing at SDI says unlike other medical claims that only consistently capture fields required to ensure payment, EHR systems raise analytical possibilities by fielding softer quantitative and qualitative data that may be useful for studying key healthcare issues.

“For example, oncology-based EHR systems typically capture the staging and morphology of a tumor type,” she says. “This goes beyond the information that is commonly available and vastly improves the context, quality, and results that a study using these data may generate.”

Ms. Fisher says it is anticipated that there will be a fundamental shift in how some Medicare providers operate with the beginning of the Medicare Shared Savings Program. This shift is expected to place greater emphasis on the value of each healthcare decision and action. In January 2012, Accountable Care Organizations (ACOs) will emerge, and how they they are incentivized will be different. (To read more about ACOs and their impact, please turn to “Be Successful in the New World of Accountable Care Organizations.”)

Forward Thinkers Wanted

Effective market research departments build influence within their organizations by using

Traits of a Senior Leader in Market Research

In addition to the classic traits of successful senior leaders, such as excellent communication skills, interpersonal skills, and industry knowledge/experience, effective senior leaders in market research have three key perspectives:

- » Global consulting, management, market research, and industry experience enable a senior strategic thinker to see the big picture and to speak about the impact market research has on the decision making process.
- » Senior market research leaders are business partners that successfully manage stakeholder relationships with a “small-company mentality” to get things done.
- » People skills are key for a person moving into a senior leadership position within market research to help create a common vision for the organization and to inspire people to follow.

Source: Best Practices, The Future of Market Research: Challenges and Changes in a Core Pharmaceutical Function. For more information, visit best-in-class.com.

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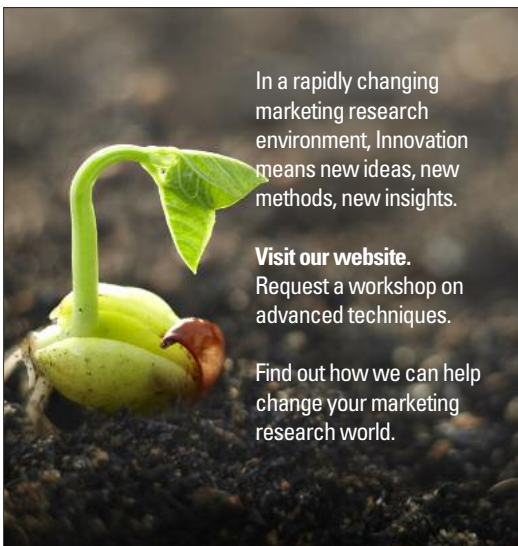
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Key Actions in Developing High-Performance Market Research Teams

- » Optimize structure through people, processes, and technology systems that embrace cross-unit coordination and sharing to enhance business impact and reduce redundancy.
- » Build market research impact through integrated management that balances staffing objectives, product category or therapeutic expertise, crisp market insights, and powerful influence skills.
- » Manage the market research function to leverage resources, balance planned and ad hoc projects, and maintain work productivity and effectiveness.
- » Develop and cultivate people so market research becomes an esteemed career track and training ground for future business leaders.

Source: Best Practices, Developing the High-Performance Market Research Function. For more information, visit best-in-class.com

customers, markets, and competitors as reference points to help leaders with critical decisions. In addition, best-in-class market research groups are able to deliver forward-looking insights and recommendations in part because their leaders effectively manage workloads.

More than 60% percent of the firms participating in the Best Practices study, Developing the High-Performance Market Research Function, manage 20 or fewer projects per market

Key points from the State of the Industry Survey presentation:

- » Research spending is likely to increase, especially in global research.
- » Qualitative and quantitative research vendors have an opportunity to improve to meet the growing need for actionable information that impacts the business.
- » Staffing, training and career paths are major issues. According to TGA5 Advisors benchmark data, each client-side researcher managed \$1.4 million in spend in 2010 compared to \$850,000 in 2006.

Source: PMRG, State of the Industry Survey. For more information, visit pmrg.org.

research professional annually. However, the data also indicate that there's room for improvement in the area of cross-communications. Best Practices CEO Chris Bogan notes that 70% of companies participating in the study "use a decentralized market research structure, and yet often don't provide training for the skills that make cross-functional decentralized structures work."

According to Best Practices, the best market research departments take a comprehensive approach to determining performance and resource needs. These organizations consider a broad spectrum of factors when assessing workload requirements, then plan accordingly, using templates and benchmark libraries to inform their planning. They also employ project valuation processes and tools to marshal staff resources and measure how staff professionals perform on each project.

In the expert-panel discussion on PMRG's SOI study results, Susan Herster, senior director, market intelligence for Bayer HealthCare, encouraged fellow market research professionals to partner with legal and marketing.

"We are spending a lot more time with legal and the brand teams planning strategically instead of being reactive," Ms. Herster said.

Scanning the Digital Channels

The ubiquity of social media, digital channels, and other alternative communications technologies has created another potentially rich source for market insights — one where researchers are still figuring out how best to gather and utilize the data.

Joseph Gattuso, executive VP, chief strategic officer, at Ogilvy CommonHealth Worldwide, says because social media and other digital channels provide a rich source of insight into customer information-seeking and interactions, they also provide a real-time source for observing emerging issues and language.

"We can use these new media as sources of insight, integrate them into the creation of innovative new ways to engage our audiences, and use the data these media generate to measure our results," he says. "So, these new media can be used as an innovation cycle — from insight to creation to metrics — and back again."

(To read more about how new approaches to research can be a powerful model for understanding the current healthcare environment, please turn to "Integrating Empowerment.")

Amgen Executive Director Sheila Muir Campos predicted during the PMRG expert-panel discussion that "netography," or online ethnographic research, will become the next generation of digital marketing research.

In a presentation at the PMRG annual meeting, MedNetworks Co-Founder, President, and CEO Larry Miller, M.D.; Greg Gallo,

MedNetworks' VP, pharmaceutical services; and Michael Barnett, a fourth-year medical student and fellow in the department of health care policy at Harvard Medical School, posited a methodology for how best to employ physician social networks in brand messaging efforts. Compared with the volume-based targeting approach employed in traditional brand messaging, the social network approach they presented organizes the physician community into clusters linked by day-to-day interactions. It then prioritizes these clusters, and the individuals within, based on ability to exert influence and volume of prescriptions. The social network strategy focuses on identifying physicians who aren't traditionally targeted, but who have high influence with their peers.

According to Chris DeAngelis, VP, strategic initiatives, at SSI research shows people turn to social media for information, so providing learnings is an excellence incentive.

"When possible, share back with patients and/or physicians selected survey findings or incorporate a learning opportunity into the survey experience," he says. "Research shows successful programs grow organically. Companies need to create social media sites, so target respondents can communicate with each other.

"Think of the power of a group of patients sharing what they think about a survey and recommending that others with the same condition participate," Mr. DeAngelis adds. (To learn more about the ways patients seek and share information both in and out of the doctor's office, please turn to "Navigating the New Communications Landscape.") PV

EXPERTS



CHRIS BOGAN. CEO, Best Practices, a research, consulting, and publishing firm focused on best-practice benchmarking for

the pharmaceutical, biotech, medical device, and healthcare industries. For more information, visit best-in-class.com.

SHEILA MUIR CAMPOS. Executive Director, Amgen, a global biotechnology company that discovers, develops, manufactures and delivers innovative human therapeutics. For more information, visit amgen.com.

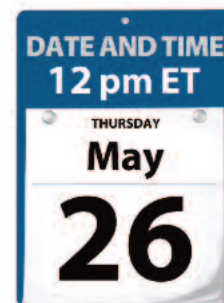
SUSAN HERSTER. Senior Director, Market Intelligence, Bayer HealthCare, a life-sciences company focused on discovering and manufacturing innovative products to improve human and animal health worldwide. For more information, visit bayerhealthcare.com.

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SPEAKERS



**Bertram Pitt,
M.D., F.A.C.C.**
Professor of
Medicine

Emeritus, University
of Michigan School
of Medicine, Division
of Cardiology



**Rudolf de Boer,
M.D., Ph.D.**
Associate
Professor in

Cardiology,
University Medical
Center Groningen,
Department of
Cardiology



**Pieter
Muntendam,
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