



# Managing Change in HEALTHCARE MARKET RESEARCH

**A**fter years of conservative stagnation healthcare market research is on the threshold of major and unstoppable change. How will this change impact research firms and their clients and how can it best be managed?

## Change Drivers

There are two main drivers of change in the industry:

1. Technology which is giving us new data collection and analysis options
2. Knowledge, specifically about how the human mind works which is challenging our traditional ways of doing things

## New Technologies are Impacting Research Logistics

The mid-1990's saw the arrival of the World Wide Web making online surveys possible, and DTC advertising became permissible introducing the need for consumer research. This was the beginning of the change movement in healthcare research bringing with it an influx of firms and client side managers from the more advanced consumer industries with new ideas. However, market research is a conservative profession and even now can be slow to change. It took new research firms to capitalize on the peripheral digital technologies that grew up around the Web including web cams, video streaming, smart phones, tablet computers and Bluetooth technology to bring us new ways of interfacing with respondents and respondents interfacing with each other. Online Bulletin Boards and now real time online video focus groups are saving time and money and allowing us to access broadly distributed populations of patients with rare diseases with all the techniques available in a research facility. Still in our future are ubiquitous face to face video telephoning and virtual reality, but they are just around the corner and we will see:

- » IDIs and TDIs converge into a single technique very little different in person to "on the phone", with all projective techniques

and stimuli available in both mediums.

- » Virtual reality technology meaning that you no longer need to be there to be there. Why sit in a darkened room and watch a focus group when you can be virtually but invisibly seated in the room?
- » Miniaturized devices for reading eye movements or for brain scanning shipped to respondents' home for use. We are already using miniature digital audio recorders to capture the content of physician-patient conversation and even tiny Bluetooth accelerometers to record patients' physical activity 24/7 in a cardiac study.

## Knowing More About Brain Function Will Change the Face of Research

Brain scanning and neurochemistry deliver new knowledge of brain mechanisms on a monthly basis. We are discovering more and more "hardwired" influence and decision making circuits in the brain. We now understand more about how memories are formed—enough to know that short term recall tests in message testing batteries are basically pointless.

Psychology has been active too, and advances in understanding decision algorithms such as those included in the idea of "Behavioral Economics" enable researchers to construct studies that speak to the core of human behavior processes. Non-Adherence, for example, can be seen as a rational if often misguided behavior and the impact of physician behavior and counseling on patients' behavior fully understood.

Natural Language Processing, a computer based language analysis technique, can provide an explanation of the real meaning behind respondents words and find groups of respondents who share common language and common behaviors.

Contributed by



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## How Will Healthcare Market Research Change?

Technological advances bring human consequences. Research firms will need to be larger on average and well-funded to develop new methodologies and techniques. IT departments will need to be strengthened and will have an increasingly critical role. Companies that introduce new and advanced techniques will have to also be training companies, educating the market place on their products

and services through workshops and webinars.

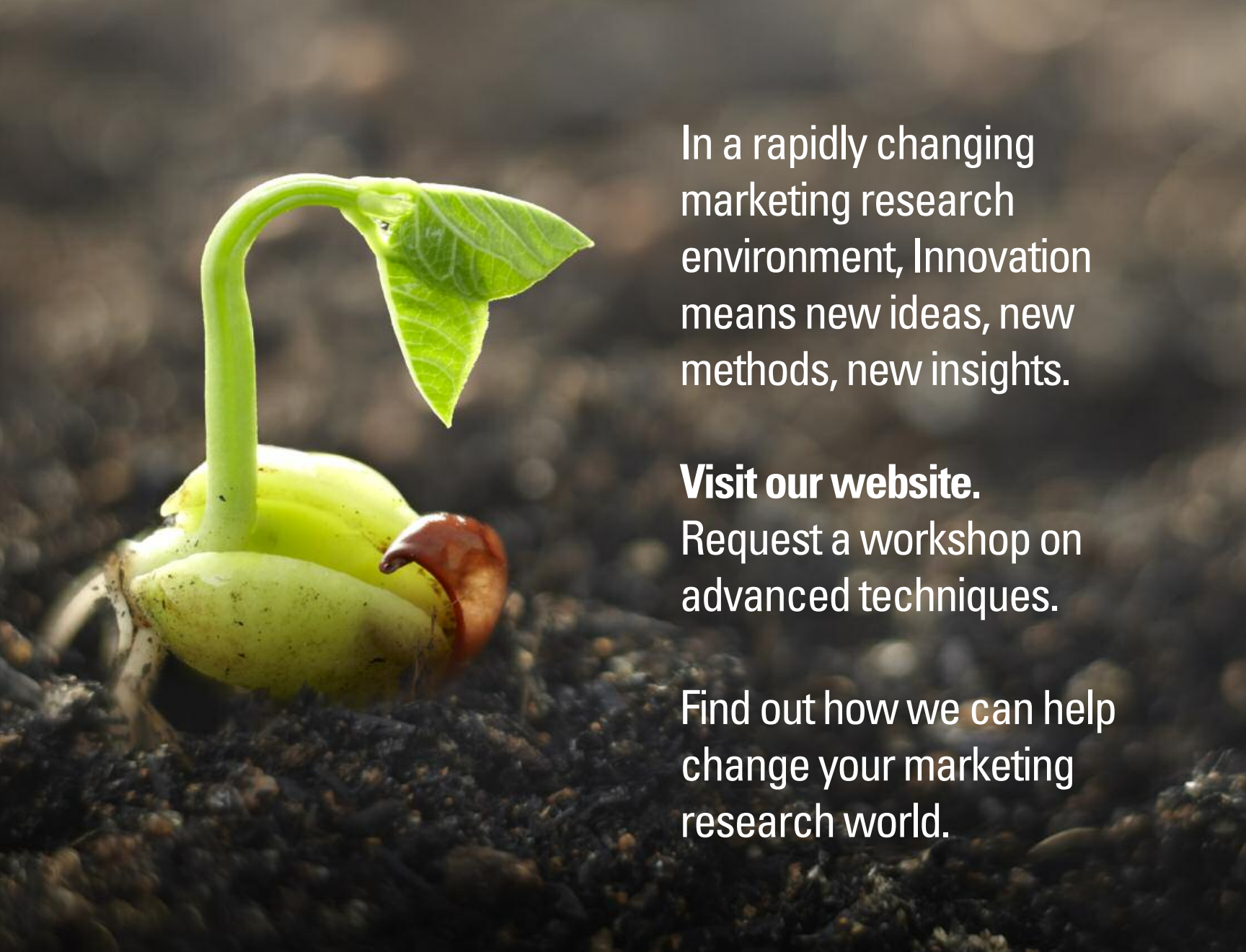
Market research managers in healthcare companies, many of whom are invested in their knowledge of traditional research methodologies, face a steep learning curve. For them the future holds:

- » A need for constant retraining and updating
- » Ceding a measure of control to their research vendors as qualitative research becomes more psychological and a matter for post collection analysis not just observation of the research itself
- » A need to share the presentation of results with their vendors because much deeper understanding of psychology and linguistics will be required
- » A sense of a loss of degree of control that they have over traditional research
- » Less ability to directly compare vendor pricing
- » A need to express RFPs solely in terms of the business need to be met and not the techniques to be used

Oh yes! It's going to be a very different world and the future is already here. **PV**

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