FMR Global Health

A life science marketing organisation

THE SECRETS to Understanding your Healthcare Clients



30 years of expertise undertaking Studies in the area of Healthcare

WHAT WILL YOU FIND IN THIS GUIDE?

Market Research is like Cooking...

IN REAL LIFE, all chefs have the same ingredients available to them to concoct their dishes (meat, fish, vegetables, spices, etc.). The same applies to Healthcare Market Research, as we all have the same tools to carry out your studies (face to face interviews, focus groups, telephone interviews, online questionnaires, etc.).

However, when you eat the same dish in the finest of restaurants or at a local diner, you do not get the same pleasure from the experience, you do not feast on the same delicate flavours, or experience the same creativity. And this is quite normal because it all boils down to the chef!

IN HEALTHCARE MARKET RESEARCH, the same principle applies. It is the know-how, experience and creativity in the way that your methodologies are built up to meet your specific needs that will make the difference and ensure you obtain the best service and support possible. The purpose of putting together this guide is to pass on some of our most successful recipes to help you understand your markets and your prescribers and thus develop products with even more success.

And because Healthcare Market Research is like cooking, at the end of this guide you will discover some of the best restaurants in the world where you will experience the same pleasure and creativity as with FMR GLOBAL HEALTH...

Eric Ohayon, President

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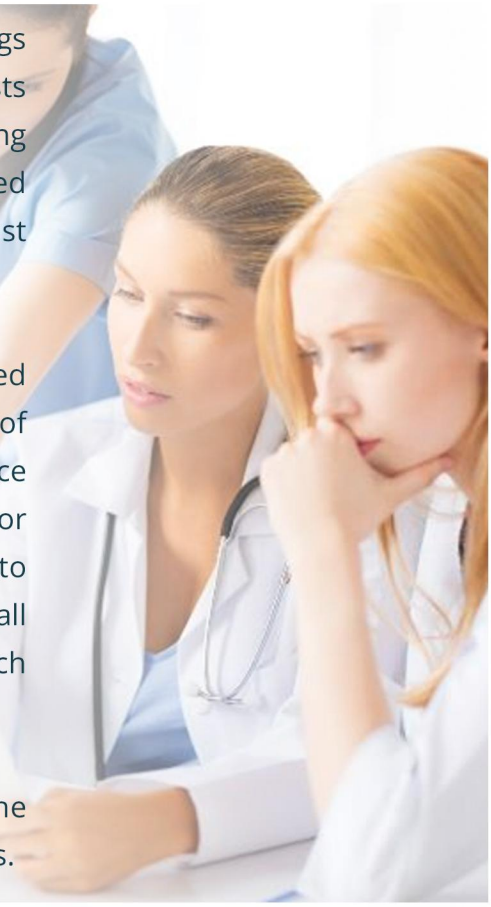
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The secret to UNDERSTANDING HOSPITAL DECISION-MAKING PROCESSES FOR SEVERE PATHOLOGIES

In-facility Multi-Disciplinary Team Meetings provide highly valuable insight...



IN REAL LIFE, multi-disciplinary team (MDT) meetings bring together various hospital-based specialists whose competencies are necessary to taking decisions, and thus ensure that patients are provided with the best possible management based on the most recent scientific developments.

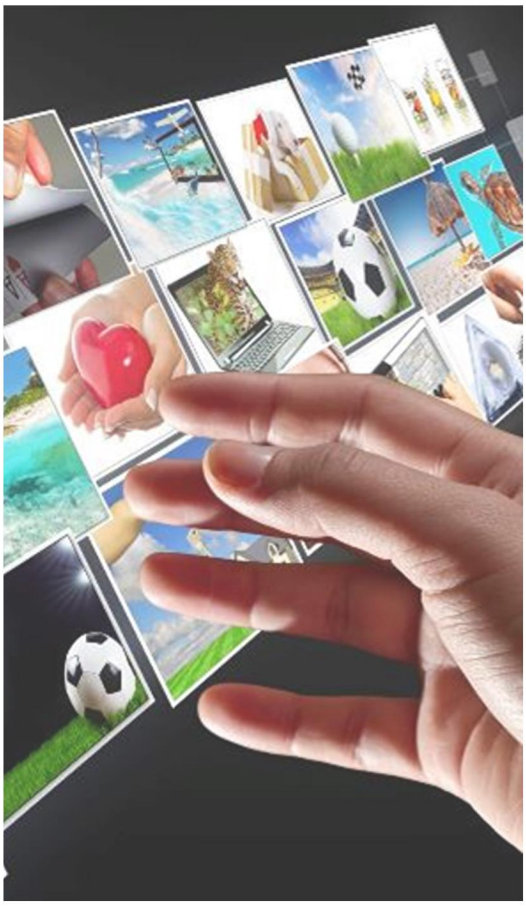
In oncology for example, MDT meetings are required for decisions to be taken for a large proportion of patients. However, MDT meetings do not take place exclusively in the field of oncology and may be held for other cases and in particular for decisions pertaining to the management of complex patients. In this case, all the specialties required to diagnose patients and reach treatment-related decisions must be represented.

During MDT meetings, patient files are discussed by the group and their decision is then explained to patients.

IN HEALTHCARE MARKET RESEARCH, we re-enact these multi-disciplinary discussions in-facility to study the therapeutic decision process for severe pathologies treated in the hospital setting, based on physicians' own patient cases.

The secret to ENCOURAGING EXPRESSION OF THE EMOTIONAL DIMENSION OF YOUR PRODUCT VERSUS THE COMPETITION

Working with Image Banks proves to be a highly productive approach



IN REAL LIFE, the image of a product, brand or company corresponds to the way in which it is perceived by its clients.

This perception may be based on objective or subjective criteria. Brand image is intrinsically linked to the characteristics of the product or brand in question but is also greatly influenced by promotional strategies.

Brand image can be measured and analysed by studying associations made with this brand by its actual and potential clients and relative to other brands.

Positive brand image bolsters product growth and differentiation versus the competition and may thus trigger real preference.

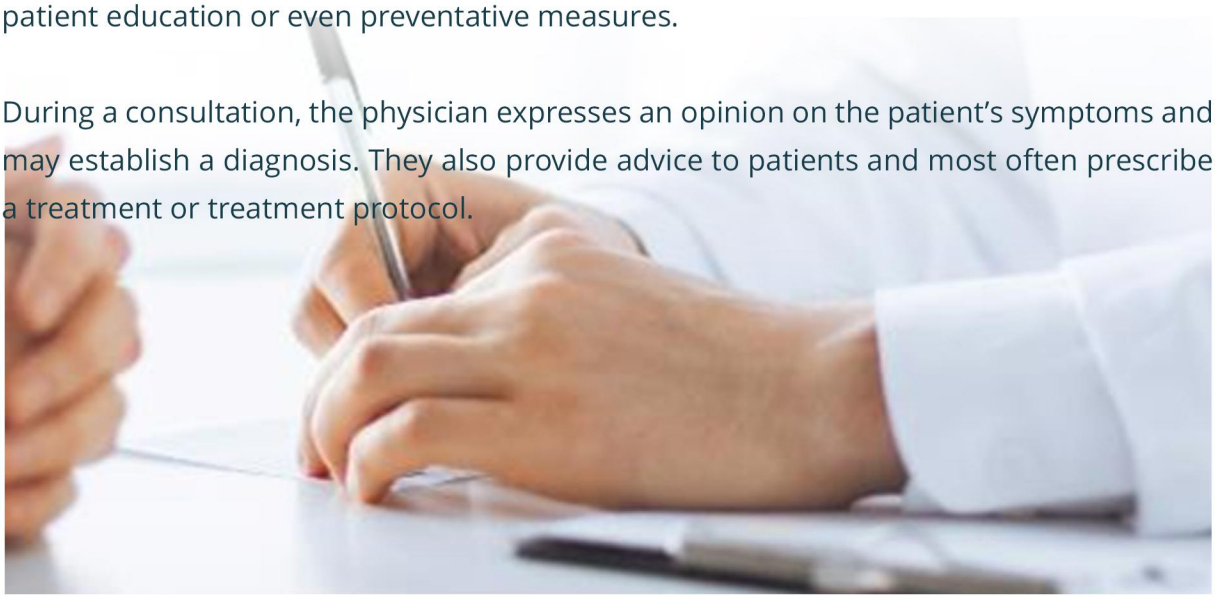
IN HEALTHCARE MARKET RESEARCH, we shall explore the subjective image of your product versus the competition by exposing HCPs or patients to image banks. This technique encourages the expression of emotions and of the most hidden or deeply buried feelings.

The secret to IDENTIFYING DIAGNOSIS PROCESSES AND CRITERIA BEHIND TREATMENT CHOICE

Re-enacting Consultations Live is a marketing technique based on facts…

IN REAL LIFE, office and hospital-based GPs/specialists have consultation with patients to examine or monitor their state of health. Consultation may lead to technical procedures, patient education or even preventative measures.

During a consultation, the physician expresses an opinion on the patient's symptoms and may establish a diagnosis. They also provide advice to patients and most often prescribe a treatment or treatment protocol.



IN HEALTHCARE MARKET RESEARCH, we re-enact Consultations Live in-facility. Several physicians receive patients in succession as in real life. After observing the consultations without asking any questions, a debriefing session with each physician enables to:

- Explain the diagnosis process
- Discuss patient management
- Assess the way in which patient personality and history influence physicians' choices
- Understand the criteria behind treatment choices

The secret to CARRYING OUT QUALITATIVE SEGMENTATION OF YOUR PATIENTS

Turn your prescribers into Journalists, a unique and highly effective Role Play!

IN REAL LIFE, segmenting a clientele means dividing them up according to specific criteria to then form groups of individuals that are as homogeneous as possible.

Hence, a market segment is a group whose individuals that compose it present similar characteristics and are likely to respond in a relatively similar way to a sales proposal.

The objective of segmentation is to identify the differences (between segments) and similarities (within a same segment) with regard to clientele attitude (existing or potential) so as to take decisions and undertake marketing actions.



IN HEALTHCARE MARKET RESEARCH, we make use of projective techniques to carry out qualitative segmentation. One of these techniques is to turn prescribers into journalists. Thus, they have to imagine they are standing outside a hospital, and are looking for a representative panel of patients for a TV program. Physicians are brought together in Focus Groups and are asked to build up these profiles, perform segmentation and provide arguments.

The secret to **STIMULATING CREATIVITY**

Collage is an efficient and tried & tested creativity-enhancing technique

IN REAL LIFE, collage is a powerful ally of creative visualisation. The idea is to actually produce the ideal poster by drawing or making a collage with visuals, photographs, sentences or letters cut out from books or magazines and then to stick them all on a board.

From a therapeutic standpoint, some physicians and psychiatrists advocate creative visualisation for patients suffering from skin, cardio-respiratory or pulmonary disorders, sexual dysfunction or even numerous forms of cancers.



IN HEALTHCARE MARKET RESEARCH, we use this collage technique to enable participants, so both patients and HCPs, to express their creativity other than through words. Whether the objective is to elaborate concepts or visuals, imagine new offers or even build up new stories, this technique enables to really head off the beaten track and on a quest for innovation and differentiation.

The secret to IDENTIFYING YOUR PRESCRIBER'S REAL NEEDS

Getting your prescribers to step into an Imaginary House is an original and highly productive approach!

IN REAL LIFE, the prerequisite for creating something new and truly valuable is to gain better understanding of your clients' and HCPs' needs and expectations. But to achieve this, you must first discover what these needs are. Are these needs currently met by another drug or manufacturer? Why would HCPs choose you to meet these needs? How can their real needs be pinpointed?



Expressing these needs is often a difficult operation as people in general find it hard to project themselves into alternative situations. Although they are often able to share what they do or do not like, they are often more hard pushed to tell us what they would like. A projective process is thus required to achieve this objective…

IN HEALTHCARE MARKET RESEARCH, we use a projective exercise called the Imaginary House. This house has several rooms (the practice room, frustrations room, the expectations room etc.) which HCPs enter in turn and then describe what they see, do and feel. This exercise will enable us to address their habits, innermost desires but also what makes them frustrated, disappointed and anxious etc.

The secret to PERSUADING NON-PRESCRIBERS TO PRESCRIBE YOUR PRODUCT

Nothing better than a Wargame to confront prescribers and non-prescribers of your product

IN REAL LIFE, convincing implies listening to the others to understand their logic, identifying their expectations and objections, preparing one's arguments, being credible while basing oneself on proof, being totally clear when presenting one's arguments, and sharing one's innermost beliefs.



IN HEALTHCARE MARKET RESEARCH, we bring prescribers and non-prescribers of your products together in Focus Groups so as to confront their perceptions and attitudes and pinpoint the beliefs that lie behind their convictions.

Having worked on their prescription logic, SWOTs of the various offers, available proof, associated beliefs, needs and expectations, we divide them into 2 teams for an all-out Wargame session with the purpose of:

- Constructing structured arguments to convince those who do not prescribe your product to do so.
- Identifying objections to the prescription of your product and the response that is most likely to persuade them otherwise.

We bring to light the levers of conviction by observing how the prescribers of your product manage to convince non-prescribers.

The secret to PENETRATING LEVELS OF REALITY NOT EXPRESSED IN CONVENTIONAL INTERVIEWS

Ethnographic Interviews – a formidable Social Market Research technique

IN REAL LIFE, ethnographic interviews are above all the art of listening. Ethnographers first observe the participant, listen to them to get a feel for their views and penetrate levels of reality not expressed in conventional interviews.



These interviews encourage participants to express themselves freely on various topics by re-enacting real-life scenes, using projective exercises to convey their state of mind and feelings via open-ended questions based on looser discussion guidelines.

Participants are instructed to enter all the information in a Diary that they are to complete alone during the week building up to the interview. Then, they will be asked to share their Diary entries with the ethnographer in a long interview with guidelines that the ethnographer adjusts to the specific case at hand.

IN HEALTHCARE MARKET RESEARCH, we use ethnographic interviews with patients:

- Both to better understand their views, attitudes and expectations,
- And gain more in-depth understanding of their state of mind with regard to their disease, their treatments and rapport with HCPs.

The secret to QUANTITATIVE GATHERING OF COMPLEX PATIENT CASES FROM YOUR PRESCRIBERS

CAPI grant access to your prescribers' patients directly on their practice location

IN REAL LIFE, the gathering of patient cases directly from your prescribers is a formidable quantitative and qualitative tool to evaluate prescription attitudes and behaviour.

However, as time goes by, patient cases become increasingly complicated, lines of treatment are replaced, the patient flow becomes more complex, and treatment strategies are increasingly assessed in multi-disciplinary groups.

Information pertaining to patients is increasingly sought for at the source, so at the HCP practice itself and directly in patient reports.



IN HEALTHCARE MARKET RESEARCH, we use CAPI (Computer Assisted Personal Interviewing) for Quantitative studies with your prescribers directly on the location of their practice to gather complex patient cases.

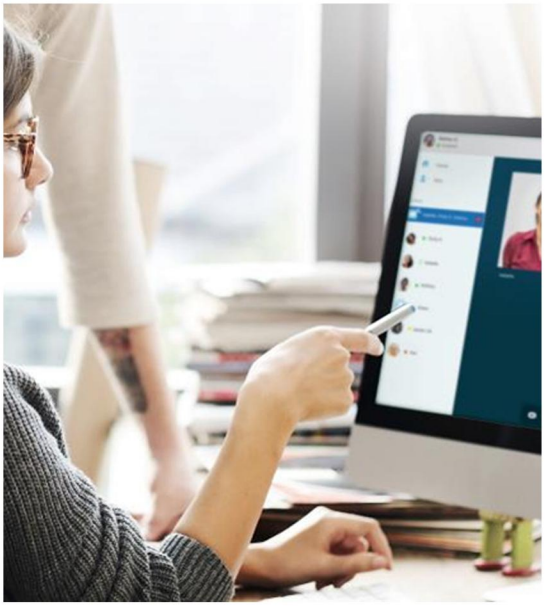
The interviewer carries out their interviews face to face with a tablet on which the fieldwork manager will have first transferred all the information required for the study.

The secret to BRINGING TOGETHER IN FOCUS GROUPS PRESCRIBERS WHO ARE FEW AND FAR BETWEEN

Online Focus Groups represent a real opportunity for multi-target / multi-country sessions

IN REAL LIFE, Focus Groups are a tried & tested method for qualitative studies. They enable to stimulate the production of ideas and build new concepts by encouraging discussion between participants.

But how is this possible when there are few prescribers in a given specialty and who also practice in healthcare establishments that are geographically far apart or even in several countries as is the case for example for some specialties in oncology, haematology, orphan diseases, etc.?



IN HEALTHCARE MARKET RESEARCH, we hold Online Focus Groups regrouping prescribers who are few and far between and spread out over several regions or countries. Our clients can follow the Focus Groups in real time and interact Live with the moderator.

Online Focus Groups come with numerous advantages:

- Possibility of bringing together physicians from specialties with a restricted physician population spread out over several regions/countries
- No travel time or Viewing Facility costs
- No specific equipment required apart from a computer
- Multi-media content can easily be integrated

The secret to IDENTIFYING OBJECTIVE AND SUBJECTIVE CRITERIA RELATED TO THE IMAGE OF YOUR PRODUCT

How about asking your prescribers to play a round of Taboo?

IN REAL LIFE, some board games are a real source of inspiration and Taboo is one of these. Taboo is a card game with words to be guessed (e.g. diabetic) and Taboo words that should not be used when trying to hint at the first word (e.g. sugar, glucose, injection, insulin, control). With Taboo, expression and creativity take the centre stage to help describe the words! Taboo is the ideal game to bring a group together and have a fun and highly productive time!



You have understood by now that the objective in a game of Taboo is to get a team member to guess a word without using certain forbidden words referred to as Taboo words.

IN HEALTHCARE MARKET RESEARCH, we have adapted this board game to work on the image of drugs. The exercise is performed in the framework of a five-person Workshop. The moderator selects one participant whom they ask to go and stand by a Paper Board some distance away from the other four participants. The moderator then shows the participants who remained seated a card on which is printed the name of a drug as well as the words that should not be used (manufacturer name, molecule name etc.). These are the Taboo words (which would make guessing easy).

The four participants who remained seated must try to get their peer standing by the Paper Board to guess the name of the product without ever saying the Taboo words (forbidden/obvious words) written on the card. This exercise is repeated for your product and those of the main competitors.

The secret to EXPLAINING PRESCRIPTION LEVERS AND BARRIERS

Let us now discuss some of your physicians' own patients…



IN REAL LIFE, writing out a medical prescription involves HCPs choosing one product rather than another to treat their patient's pathology. Prescription is influenced by numerous factors such as patient profile, the pathology, patient history, products available on the market, etc.

Any research into prescription levers and barriers must adopt a method which does not base itself solely on declarations but also analyses facts.

IN HEALTHCARE MARKET RESEARCH, exploration of prescription levers and barriers must be based above all on the description by prescribers / non-prescribers of concrete patient cases stemming from their respective daily practice:

- Patients they have treated with your product
- Patients they have treated with a competitor product

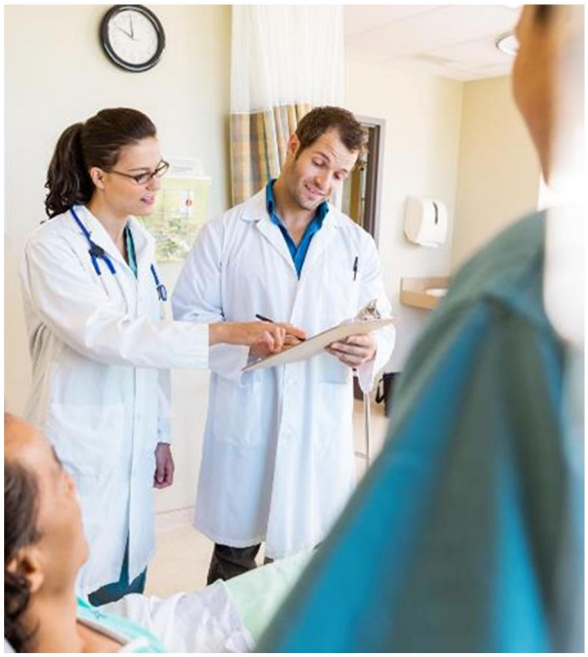
Discussions concerning various patients will bring to light the levers and barriers of their prescription depending on profiles.

The secret to UNDERSTANDING THE NEEDS OF YOUR CLIENTS IN THE HOSPITAL SETTING SO AS TO OFFER THEM INNOVATIVE SERVICE

Day in Life: several days of immersion with specialist physicians in the hospital care pathway…

IN REAL LIFE, immersion is the most objective and satisfactory way of understanding an organisation, a group, or an environment. It is possible to detect expectations but also an above all dysfunction, frustrations, regrets lying at the origin of needs and potential expectations.

One does not see or feel the same things when observing from the outside or when immersed in the environment itself.



IN HEALTHCARE MARKET RESEARCH, when we seek to identify the needs of hospital-based specialists so as to suggest innovative services, it is indispensable to physically immerse ourselves in their environment.

We accompany several hospital-based specialists in the care pathway for several days. By observing the behaviour, interactions with medical teams, the work organisation and processes as well as therapeutic strategies when at the patient's bedside, we can identify dysfunction, frustrations and disappointments of the medical team which you may be able to address with truly innovative solutions.

The secret to ANALYSING THE FACIAL EXPRESSIONS OF YOUR PRESCRIBERS AND LINKING THESE TO THEIR BEHAVIOUR

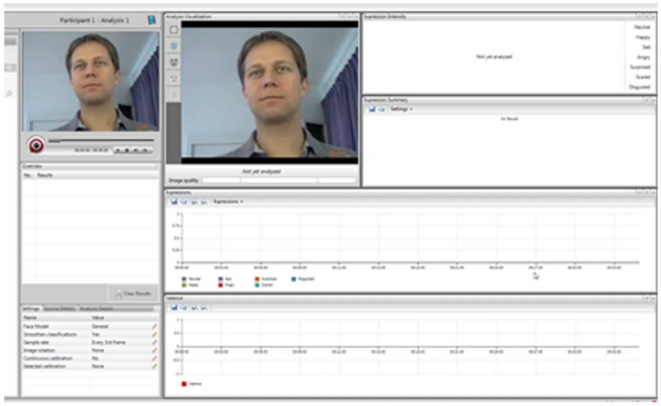
Face Reading or the understanding of facial expressions and linking this to behaviour

IN REAL LIFE, facial expressions are an important part of behaviour and non-verbal communication.

Facial macro-expressions such as smiling, grimacing or surprise are the easiest ones to interpret. But facial micro-expressions are much harder to detect and yet they can give valuable insight into how someone feels about a situation or a new offer.

Analysis of facial muscles via a complex algorithm enables to capture the various facial expressions and link them to feelings.





IN HEALTHCARE MARKET RESEARCH, we use the Face Reading algorithm to carry out behavioural analyses based on rational and emotional criteria. Analysis of facial expressions on a quantitative sample of physicians exposed to your communication strategy or your product enables to detect their facial emotions and link them to their behaviour.

The secret to SEEKING FOR CONSENSUS AND IDENTIFYING FRACTURE POINTS

Should Focus Groups or IDIs be the priority?

IN REAL LIFE, the optimum study methodology to be used to gather qualitative information remains a recurring question: should Focus Groups or IDIs be the priority , and what is the rationale?

Focus Groups should be the priority whenever seeking for a consensus and to identify fracture points. This is a method that appeals to participants as it places emphasis on discussion and role play and enables to pinpoint the key arguments. It guarantees real interaction between participants so as to stimulate the production of ideas and build up new concepts. On the other hand, IDIs should be focused on when striving to capture the following in depth: individual experience, each person's feelings without outside influence or else re-enactment of a real life situation.







IN HEALTHCARE MARKET RESEARCH, there is no such thing as "right" or "wrong" methodology. However it is crucial to choose methods that will generate the highest added-value in the light of your objectives and needs. Thirty years of expertise in Healthcare Market Research enable us to advise our clients efficiently!

The secret to MEASURING THE IMPORTANCE AND APPEAL OF YOUR PRODUCT'S ATTRIBUTES WITH REGARD TO PRESCRIPTION

Trade-Off: a highly valuable and tried & tested quantitative technique

IN REAL LIFE, when choosing between several products, clients seek for the best compromise. They choose a product which according to them best meets their needs. They thus place emphasis on certain criteria referred to as attributes which they believe to be more important compared to others which are less important for them.

The Trade-Off model enables to measure purchase behaviour but also to explain decisions. In depth awareness of decision processes will enable to influence clients' purchase decisions.



IN HEALTHCARE MARKET RESEARCH, we place emphasis on this Trade-Off method in quantitative studies with prescribers and non-prescribers of your product. Your product is broken down into characteristics or variables, and each one of which can take on various modalities. Analysis will determine:

- The relative importance of the various variables in the prescription process,
- The appeal and usefulness of each of the variable's modalities.

The secret to MEASURING EVOLUTION OF PERFORMANCE AND UNDERTAKING CORRECTIVE ACTION IN REAL TIME

Tracking is an excellent tool to ensure Monitoring of performance



IN REAL LIFE, Tracking or monitoring studies are used to follow information in real time. They enable to carry out instantaneous measurement (several waves), follow evolution over time, uncover trends and proceed with comparisons. Tracking helps heads of Marketing gain insight into WHAT and HOW rather than WHY… Such a process thus provides an assessment of the evolution of product performance, of a communication strategy or of a company within its competitive environment.

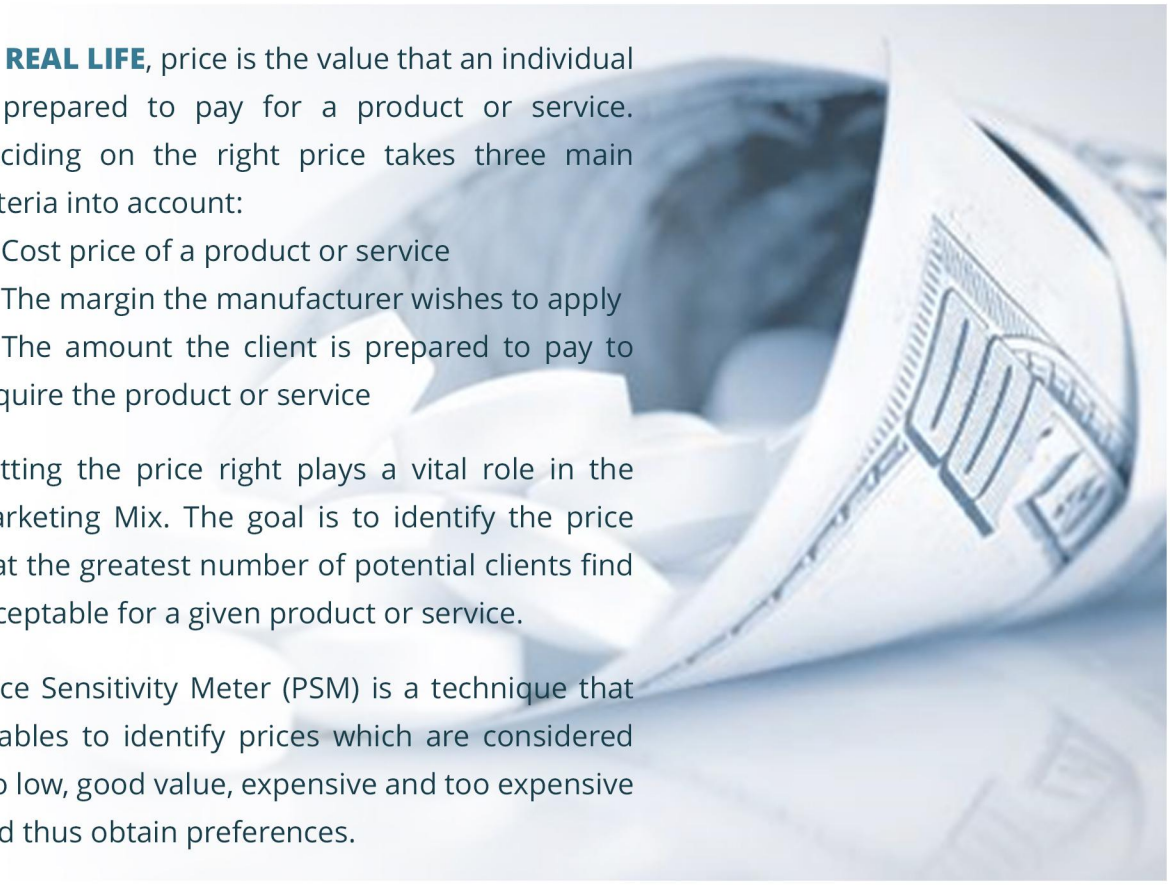
This is a quantitative approach that requires a solid sample of respondents to obtain statistically significant results.

The timing and frequency of the various Tracking waves must reflect the speed with which the information that is to be measured changes. Monitoring of brand performance, advertising impact, satisfaction surveys or product/service usage are the types of Tracking studies carried out most often.

IN HEALTHCARE MARKET RESEARCH, we perform tracking studies with HCPs and patients to monitor the launch of a new product, follow the evolution of medical prescription, assess the impact of a manufacturer's communication strategy, etc. The results of our Tracking studies enable our clients to undertake corrective action in real time and identify new opportunities.

The secret to SETTING THE RIGHT PRICE FOR AN OTC HEALTHCARE PRODUCT OR MEDICAL DEVICE

Price Sensitivity Meter (PSM) is a technique that enables to set the ideal price for your product



IN REAL LIFE, price is the value that an individual is prepared to pay for a product or service. Deciding on the right price takes three main criteria into account:

- Cost price of a product or service
- The margin the manufacturer wishes to apply
- The amount the client is prepared to pay to acquire the product or service

Getting the price right plays a vital role in the Marketing Mix. The goal is to identify the price that the greatest number of potential clients find acceptable for a given product or service.

Price Sensitivity Meter (PSM) is a technique that enables to identify prices which are considered too low, good value, expensive and too expensive and thus obtain preferences.

IN HEALTHCARE MARKET RESEARCH, price studies are of great interest within the framework of healthcare products and medical devices sold OTC and thus directly accessible to consumers.

These are fundamental quantitative studies that we undertake on robust samples of potential consumers of a wide variety of products.

The secret to IDENTIFYING YOUR PRODUCT'S MOST RELEVANT CHARACTERISTICS TO BE FOCUSED ON IN YOUR COMMUNICATION STRATEGY

Conjoint Analysis determines your product's optimal group of characteristics

IN REAL LIFE, the choice of a product or service revolves around a complex mechanism based on the assessment of the various characteristics / attributes of a product or service.

In a purchase situation, consumers do not make up their minds based only on one attribute. They examine a range of characteristics or attributes and then make judgements or compromises in order to come to their final choice.

When we need to understand the importance of the various attributes of a product and the way in which they can be used in a brand's communication strategy, we perform conjoint analysis. This method examines the choice-making process and determines the combination of attributes that will prove most satisfactory for consumers.



IN HEALTHCARE MARKET RESEARCH, we approach HCPs and use conjoint analysis to determine the characteristics of your product that are most likely to work in favour of its prescription. We thus help heads of Marketing decide on the best advertising message by revealing the characteristics that are of the greatest importance when it comes to choosing a product.

The secret to ESTIMATING THE POTENTIAL OF A NEW PRODUCT AMONGST ITS PRESCRIBERS

Confronting physicians with daily-practice situations is a tried & tested approach

IN REAL LIFE, estimating the potential of a new product requires a benchmarking process with similar products that have been launched but also a quantitative assessment of the attitudes and behaviours of targets with regard to the new offer. We first of all establish a frame of reference by comparing it to existing products called "internal benchmarks" or by comparing it to products from other companies on the market.



When several products are launched simultaneously on the market, the goal is not merely to assess demand for a new product in particular but rather to estimate the potential demand or the size of the market considered. To achieve this, we use "syndicated data" and survey data (IDIs, online surveys). These surveys will shed light on the needs and attitudes with regard to a new product and on the triggers that will impact its choice. In this way, it is possible to estimate future sales, obtain an overview of practices and evaluate the possibilities of improving these sales.

IN HEALTHCARE MARKET RESEARCH, in the case of prescription products for example, we ask the physicians concerned to describe several of their patients suffering from a certain pathology. Having presented them the new offer via a Product Profile, we ask them whether they would have prescribed the new product or not if it had been available when the consultation with each patient had taken place. Getting physicians to put themselves in a daily-practice situation enables to assess the potential of a new product, its penetration rate, its competitive environment as well as the weight of each of the choice criteria.

The secret to MEASURING CLIENT SATISFACTION TAKING THE EMOTIONAL DIMENSION INTO ACCOUNT

A happy client, means a happy business!

IN REAL LIFE, client satisfaction has been at the very heart of marketing strategies for the last four decades. Client satisfaction was previously perceived as going hand in hand with quality or value of the offer, and considered as automatically fostering loyalty, in keeping with the idea that a happy client is a captive client. Subsequently to the globalisation of markets and the upheavals caused by the digital revolution, things are no longer quite so straight-forward.

It can now be observed that a satisfied client is not necessarily a loyal one and that a loyal client is not always satisfied. But how can this be explained? And how can satisfaction be measured in order to optimise the management of client relations and set up adapted operational measures?



IN HEALTHCARE MARKET RESEARCH, evaluation of client satisfaction (physicians, pharmacists, patients, etc.) with regard to your products is crucial. Three indicators can be used to assess it and thus set up suitable strategies:

- CSAT (Customer Satisfaction Score)
- NPS (Net Promoter Score)
- CES (Customer Effort Score).

These take into account a more emotional dimension of client relations management and are based on simple questionnaires that are easily understood by all and that do not necessarily need to be distributed via the conventional client relations channels.

The secret to DISHES BRIMMING WITH FLAVOURS AND CREATIVITY

A few of the best restaurants in the world where you will experience the same pleasure and creativity as with FMR GLOBAL HEALTH

The 2017 list of the best restaurants in the world was announced on December 5, 2016.

Guy Savoy and his restaurant at the Monnaie de Paris is in first place, with Kenichiro Nishi's Kyo Aji (Minato, Tokyo) and Eric Ripert's Le Bernardin (New York) coming joint second.
Four restaurants share the third place: the Roca brothers' El Celler de can roca (Génone), Alain Ducasse at the Plaza Athénée (Paris), Massimo Bottura's Osteria Francescana (Modène), Kyubey (Tokyo) and Jean-Georges by Vongerichten (New York).

Last year, Benoît Violier came top of the ranking followed by Thomas Keller and his New York restaurant Per Se. Unfortunately Benoît Violier passed away on 31st January 2016. The restaurant he was in charge of, now run by Franck Giovannin, is joint fourth in the 2017 List with Peter Knogl (Cheval Blanc), Régis and Jacques Marcon, Arnaud Lallement (L'Assiette Champenoise), Joël Robuchon with his restaurant in Tokyo and the Da Vittorio (Brusaporto, Italy).

This List, compiled under the auspices of the ambassador Philippe Faure from 400 guides, gastronomic publications and international websites participating in the venture, awards scores (ranging from 88.25 to 99.75 out of 100) to a thousand restaurants. This year, the two countries with the highest representation in the list of winners are Japan (116 restaurants) and France (113 restaurants).

By Ulla Majoube with AFP, published on 05/12/2016

GET IN TOUCH

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