2022 Basel Meeting
27 September

ephmra

Convenors:
Angela Duffy, Senior Director, Research Partnership
Fenna Gloggner, Director, Global Customer Insights, Idorsia Pharmaceuticals
Hannah Osborn, Founding Partner, Pure Healthcare Strategy

Venue:
Pullman Basel Europe
Clarastrasse 43, Basel 4005,
Switzerland

08.30 – 09.00

Registration and welcome coffee

09.00 – 09.10

Welcome and Introductions

09.10 – 09.40

Session 1: Activating Undiagnosed Patients to Seek Care Through a mix of Research Methods and Behavioural Science Principles

Objectives of the paper: Getting patients to seek care and take their health seriously while in their best interests is surprisingly hard even when it comes to serious conditions (e.g. those that involve their heart). Understanding from a behavioural science and market research lens what prevents them from seeking care when symptomatic or when their symptoms escalate can illuminating to understand how to activate them. Via a case study, Adelphi will demonstrate how our NUDGE solution effectively pairs strong foundational research with behavioural science to help understand:

1) What stops patients from seeking care?

2) How to activate them via messaging/tactics to go seek medical help?

3) Direction on media buy so you can target these patients effectively?

Takeaway 1: It is important to understand patient mindsets (i.e. how they relate to their symptoms and the strategies they use to cope with their symptoms) to identify ways to activate them. Mindsets are critical to understand 'fallacies' patients tell themselves to justify their inaction. By understanding mindsets, you can understand how to expose their fallacies and get patients closer to taking action

Takeaway 2: Mindsets are fluid and patients can evolve to different mindsets influenced by their experiences with their own disease, their healthcare and their providers. Unlike segments, mindsets are not exclusive - the same patient can be one mindset at one point in time and a different mindset at another point in time. They help us understand the evolving relationship patients have with their disease/symptoms and how it might impact their path of action. Patients can regress or progress based on how their experiences shift.

Takeaway 3: A Behavioral Science consultation can inform strategies, including tactics or messages, that can help activate patients that can be tested via qualitative research. These recommendations are both informed by science and also looking at potential marketing strategies that have been successful in the past. Further, targeting efforts can help you reach these patients at the right time and quantitatively we can profile these patients and provide recommendations on where to place messages for the best impact

Speakers: Nick Southgate, Consultant and Michelle Krumenacker, Director, Adelphi Research

Convenor: Angela Duffy, Research Partnership

09.40 – 10.10

Session 2: The old, the new, and the trendy: a different way of looking at needs in rare diseases

Objectives of the paper: To showcase a holistic assessment of patient needs by layering three different approaches: the well-known one-on-one interviews, the collaborative online communities, and the innovative voice analytics.

Takeaway 1: Patients' communities are a really rich way of gathering organic and in-the-moment thoughts and conversations that can generate insights into unmet needs that may have seemed too small to mention in a normal one-on-one interview. We created a safe space for patients to open up and interact with each other about their experience of living with a life-threatening rare disease.

Takeaway 2: The rapport created during the online community led to a very engaging and open traditional interview which means that rich insights were generated. When it came to analysing the results, we understood each person's individual journey and were able to unearth their collective motivations and disappointments.

Takeaway 3: Granular daily voice data and extracts from interviews were analysed by AI to reveal harmonies and inconsistencies between their rational and emotional reactions. This exposed unsaid anxieties towards current treatments, informing our clients of potential areas of improvement.

Speakers: Emilie Genero, Account Director, Day One Strategy and Imogen Corbett, Associate Director, Global Market Research Janssen

Convenor: Hannah Osborn, Pure Healthcare Strategy

10.10 – 10.45

Networking coffee break

10.45 – 11.15

Session 3: Making it personal…. Can we develop more compelling messages by combining personality measures and voice emotion analysis?

Objectives of the paper: We want to be disruptive - exploring and challenging whether physician personality has a significant influence on brand choice in the fertility arena, and the impact on reaction to brand messages. Our commercial aim is to help Merck to develop compelling, resonant messages that are tailored to physician's needs.

Takeaway 1: We will reveal whether understanding respondent personality provides greater insight into the drivers of brand choice in a competitive market segment (fertility), providing delegates with a technique to better assess and tailor brand messaging

Takeaway 2: We will explore what voice emotion technology (Phebi) adds to our understanding of reaction to messages according to personality profile. We will explore whether this is a valuable new use-case for voice emotion technology.

Takeaway 3: We will show what we have both learnt by overlaying voice emotion findings, respondent personality and associated behavioural drivers. Do these tools provide a consistent picture, allowing a deeper qualitative profiling of customers and a new best in class approach to message assessment? What do we learn about their relative value and application to communications development?

Speakers: Mike Pepp, Research Director, Blueprint Partnership and Katja Reinhardt, Merck

Convenor: Angela Duffy, Research Partnership

11.15 – 11.45

Q&A/Discussion to the morning presenters

11.45 – 13.00

Networking Lunch

13.00 – 13.30

Session 4: Elevating your concept testing with AI powered insights and analytics

Objectives of the paper: To demonstrate how each of the various components of a new multi-dimensional approach combining traditional primary research with new, innovative technologies, offered complementary benefits for a recently completed Janssen project to evaluate creative concepts

Takeaway 1: We will demonstrate how innovative new technologies can complement traditional primary market research techniques to provide a truer, multi-dimensional picture of how marketing communications perform with the target audience

Takeaway 2: We will explain how a new, behavioural science led approach to communications research can take into account both instinctive and considered thinking as well as other behavioural biases to provide a more holistic evaluation of marketing materials

Takeaway 3: As the world continues to transition to a post-pandemic era, we will describe how to make use of AI, facial analysis and implicit response techniques in order to gain a 360-degree view of communications performance and how this can overcome the limitations of conducting market research remotely.

Speakers: Emilie Braund, Director, Research Partnership and Alison Buchanan, Alison Buchanan Associates Ltd

Convenor: Hannah Osborn, Pure Healthcare Strategy

13.30 – 14.00

Session 5: A summary of how a custom sales intelligence platform based on AI and Data Science is helping a domestic pharma company optimize local (zip code level) engagement across consumers and HCPs.

The client, a global generics pharmaceutical company in India and USA wanted to explore new territories and map the domestic population of HCPs across India to ensure optimized coverage by its sales force to generate prescriptions (hence revenue) to stay ahead of competitors. GRG Health's data science team worked closely with the client on developing a sales intelligence platform powered with data science models to uncover intelligence one zip code at a time for absolute coverage.

Key learnings and actions by the client

1. Sales force KPIs and size restructuring as per zip-codes Demographics and health infrastructure data mapped by zip codes uncovered hyperlocal intelligence on most potential and unchartered but potential zip codes/ territories for various indications. a. The client for the first time had clear intelligence on zip codes level and is now able to re[1]structure its own sales force as per the potential of territories b. Our med-rep movement analytics module enabled client to benchmark its sales force size and KPIs depending upon multiple factors such as location, traffic, distance.

2. 2 prescribers, etc Most Innovative Healthcare Market Research Company in APAC in 2020 by CEO Magazine Strictly confidential and proprietary –not be distributed without the written consent from Growman Research And Consulting Pvt Ltd 2. Uncovered new KOLs and Influencers New Local KOLs and influencers were identified through a combination of social media reviews and demographics of practicing locations. a. The client was able to compare its internal list of KOLs with our platform's list and uncover many new KOLs to engage in future.

3. Uncovered most potential therapy areas for target zip-codes The platform uncovered women's health as a potential therapy area based on healthcare access and demographics a. Now, the client is using the findings to aggressively create a local presence in Women's Health in these pin codes.

Further Scope: Quarterly PMR data is awaited to further uncover key prescription and competitive trends. The PMR as a data set will also be added to data science mix to uncover more inclusive intelligence in the future.

Speakers: Ayush Atul Mishra and Manan Sethi, GRG Health

Convenor: Bernadette Rogers, EPHMRA

14.00 – 14.35

Networking coffee break

14.35 – 15.05

Session 6: Experience Management Powered by Voice of Customer (VoC)

Novartis have developed a Voice of the Customer Program using a platform called Medallia where they use ask their 1m HCPs for feedback. Patients and Health Care Systems will soon follow

They send out short surveys and follow up with individuals to close the loop and improve their experiences over time.

This enables the company to get real time and actionable feedback direct from their customers and to action the findings. Reinhard will share tangible examples of how they have used the insights and the impacts this has had for Novartis.

Reinhard will talk about the Novartis vision for how Voice of the Customer (VoC) will continue to empower experience management and become part of a multisource data approach.

Novartis sees this very much as an augmentation to 'standard' market research.

Speaker: Reinhard Moschitz, Executive Director, Global Lead Voice of Customer Development, Novartis

Convenor: Hannah Osborn, Pure Healthcare Strategy

15.05 – 16.10

Session 7: Ask the Experts Session with all Speakers

This is an opportunity to further delve into topics raised.

To minimise delegates moving around the room we are asking the Speakers to move around the room to answer questions.

Speakers will position themselves near to 1-2 tables and stay by the tables for up to 15 minutes to answer questions and further discuss.

Speakers will then move up to 3 times to different tables when EPHMRA rings the bell.

16.10 – 16.20

Wrap up and thanks - Convenors

16.20 – 17.00

Thanks and end of Meeting drinks