



THE HEALTHCARE MARKET RESEARCH “GAME” HAS CHANGED

CONSIDERATIONS FOR HEALTHCARE
MARKET RESEARCH POST-COVID-19

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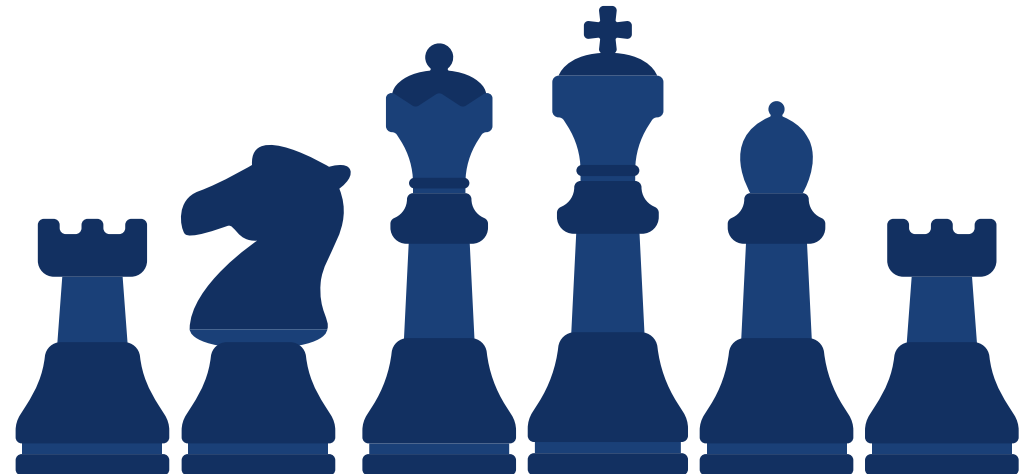


Introduction

“COVID-19.” Just the phrase quickens one’s pulse.

But, as Plato is often credited with saying, “Necessity is the mother of invention.” And in this time of unique needs, creativity abounds. While COVID-19 has created change across the board, it has also afforded market research the opportunity to grow, become more efficient and evolve.

As a result, all aspects of the healthcare market research game have changed – the board, the players and the strategy.





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The board has changed

COVID-19 fast-tracked the ongoing evolution from traditional in-person market research to digital.

Initial concerns regarding feasibility and receptivity to digital research – Would physicians want to participate? Could patients participate? – quickly fell to the wayside as healthcare market research continued full tilt.





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Social distancing, isolating and quarantining have resulted in a savvier respondent pool, when it comes to technology.

- **Microsoft Teams** has become synonymous with virtual happy hours.
- **Zoom** is hosting more birthday parties than local bars.
- **Patients** and **physicians** are becoming more comfortable with telehealth consults.
- In fact, a recent **Ipsos study** shows that consumers report using or doing more of the following, in light of the pandemic:



Social media

43%



Streaming services to watch TV shows/content

42%



Video chatting with friends

31%

SOURCES:

*Ipsos Marcoms Commercial COVID-19 Tracker – Wave 2

Ipsos Marcoms Commercial COVID-19 Tracker – Wave 2 (N = 1,111)



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This rapid immersion into digital connections also means that consumers (both patients and physicians) are more willing, able and comfortable participating in digital market research.

Behavioral science tells us that human beings like things as we become more familiar with them (i.e., the familiarity bias). As potential respondents use these online platforms more and more, there could be a halo effect where interviewees are simply more inclined to like this market research methodology overall.

Moreover, market research moderators can no longer be just versed in facilitation. They now need to be experts in virtual facilitation – where different principles apply.

We might even see the impact of social norms, where consumers assume everyone is using the online platforms and – in turn – they should as well.

Market research will still be “face-to-face” in some cases, but the screen in between those faces may be a hindrance or an opportunity.

SOURCES:

*Ipsos Behavior Science Center



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Post COVID-19, marketers and market researchers will have far more methodology choices. On one hand, some traditional in-person approaches have evolved to thrive in the online setting. On the other hand, barriers to executing some traditional approaches have led to new methodologies being developed.

Traditional in-person approaches that have evolved to online

- 1:1s
- Group dynamics
- Virtual workshops
- Ipsos’ Creative I Labs (a proprietary quant and qual study, with the same respondents, evaluating ideas and campaigns)
- Usability testing: Moderated & un-moderated, formative & summative testing

New methodologies surfacing

- Digital ethnographies
- Virtual medical device and product evaluation



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The strategy has changed

Once travel restrictions and social distancing guidelines are lifted, marketers and market researchers will be faced with a new quandary: Return to the high volume of in-person market research that was being executed before the restrictions, or consider whether the digital path will become more commonplace?

Ipsos' IUU-Healthcare team maintains that both strategic and tactical considerations need to be taken into consideration – and, for most clients, it is likely that future market research plans will contain both types of research.

Strategically, clients will need to determine which avenue best addresses their market research objectives and, as a result, allows them to fulfill their business objectives. With the expanded market research toolkit that COVID-19 has yielded, digital approaches may fully address some objectives – but in-person research still has its place, particularly when:

- In-context research is warranted for moderators and clients to see, hear and smell surroundings live
- There is benefit from physical interaction with stimuli – e.g. packaging, devices, which can only occur in a facility (e.g., hands-

on prototype research or medical device technology, where a respondent needs to sample it in facility or with a facilitator)

- The population of interest may not easily leverage digital platforms (e.g., elderly, low socioeconomic classes, third-world markets).

Tactically, if in-person research is warranted, new deliberations will be the norm:

- For example, current primary market research markets (such as New York City and Chicago) are also hot spots for COVID-19. What secondary market research markets might take their place, if any?
- Further, research backrooms used to be the hub for numerous teams to come together, sit shoulder-to-shoulder, brainstorm and participate in research. Will this still be the case – and does it still need to be the case?
- Samples may need to be smaller. Post-COVID-19, respondents may hesitate to participate in some methodologies, such as large in-person group dynamics.
- Finally, global in-person research may be feasible before domestic in-person market research. How might this influence market research plans?



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All aspects of the healthcare market research “game” have changed – the board, the players, and the strategy – and all will continue to change.



As a result, the number of decisions that healthcare marketers and market researchers will face in the coming months has grown exponentially.



As you navigate this new playing field be sure to have the right partners in place – partners who not only recognize that the game has changed, but who have actively sought to evolve it. Ipsos’ tagline of “Game Changers” summarizes our ambition to help our 5,000 clients navigate more easily our deeply changing world.



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Ipsos' Healthcare service line partners with pharmaceutical, biotech and medical device manufacturers to inspire better healthcare. Operating in 50+ markets, our 1,000+ experts support key business decisions for our clients throughout the commercial lifecycle, from early-stage strategy, to launch, to performance optimization. We do this through a uniquely integrated combination of therapeutic and market expertise, gold standard real-world evidence and market-leading custom research approaches – all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.

Let's start a conversation!



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