

## COVID-19: Accelerating digitalisation in healthcare

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### **Advances in technology continue to change how we do business, interact, and communicate. In market research, we have embraced these new channels and communication trends to develop new, innovative methods.**

However, the COVID-19 pandemic has forced us all, in a matter of weeks, to quickly adapt how we live and work. Thanks to technology, we are discovering that video calls and virtual meetings can be just as effective as in-person ones. We can use social media to receive information and stay connected, and we are participating in virtual group activities to remain physically and mentally healthy. An unexpected positive side effect of the pandemic is that we are helping the environment by significantly reducing unnecessary travel. In healthcare marketing, the digital trend continues. Currently, 13.8% of overall pharma investments are in digital multichannel marketing. A survey among over 100 pharma and bioscience companies conducted by the Pharma Marketer in 2019 indicated that, by 2022, one-third of pharma companies would spend over 50% of their marketing budget on digital channels.

mHealth is still on the rise. Telemedicine facilitates communication between patients and healthcare professionals, allowing remote diagnosis, monitoring and treatment maintenance. In the US, popular telemedicine apps include Amwell, Doctor on Demand, Teladoc, HealthTap, and MDLIVE. As of 2018, Amwell was the most downloaded telemedicine app available on both the Android and Apple app stores. Through the app, Amwell enables users to access a doctor without an appointment 24 hours a day, and prescriptions can be sent online straight to a user's pharmacy. In Europe, the UK-based platform, Push Doctor saw a 30% increase in consultations two weeks into the countrywide lockdown. Kry, the Swedish telemedicine company (also known as Livi in the UK, France, Germany and Norway) has delivered double its usual number of physician appointments. Meanwhile, symptom-checking app, Ada Health has seen a 300% increase in assessments.

The worldwide impact of COVID-19 will undoubtedly accelerate the adoption of digital across many sectors, including healthcare and market research. Here are just some of the ways the pandemic is changing marketing worldwide.

### **Mobile channels of communication**

Given the widespread mobile connectivity, using mobile communication apps is an obvious option. WhatsApp has emerged as the world's most popular messaging app. It is the leading mobile messaging platform in over 100 countries across Europe, the Americas and Asia. The World Health Organisation (WHO) has entered into a partnership with WhatsApp to launch a COVID-19 information hub to provide reliable, factual information distributed in a range of markets. Such an initiative demonstrates the importance and relevance of this platform as a communications channel.

Research Partnership recognised the ubiquitous use of messaging apps such as WhatsApp and WeChat in China and decided to explore the possibilities of utilising these platforms to capture real-time, exploratory, and multi-media enriched feedback. For our WhatsApp study, we recruited 10 migraine patients. Respondents were unanimously positive about taking part, with one providing feedback that, "I really liked the dynamics. I feel it is more fluid and personally...I felt it was possible to do it at any time of the day". For our WeChat study, we recruited 10 HIV patients. This condition

can have considerable levels of stigma in many markets but again, respondents were extremely positive about taking part and shared images, voice notes and videos, which resulted in a greater richness of insights.

### **Embracing digital technology amid Covid-19**

COVID-19 has triggered an accelerated uptake of remote communication technology. The introduction of social distancing measures has forced us to focus on digital methodologies as an alternative to face-to-face interaction. In market research, we have seen an increase in the use of virtual interviews, group discussions and entire central location days and found them an efficient way of reaching a broader target group, reducing costs and being more time-efficient and agile, proving that digital research can be successful in any world market.

The pandemic is also giving telemedicine the necessary push to be more widely accepted and used. A survey conducted in March 2020 by a global online panelist showed that physicians in Europe, US and across Asia have seen a rise in telehealth to manage their patients with many expecting the technology to stay once the pandemic has subsided.

Pharma has long equated sales of drugs with the number of reps out in the field. COVID-19 will severely disrupt this marketing model, and drive pharma to invest more in multichannel marketing solutions. Sermo's recent COVID-19 HCP Sentiment Survey found HCPs expect to have fewer representative meetings during the crisis and believe there will be a shift to virtual and distance meetings in the future, particularly in the US and Europe.

As more digital communication tools are explored, the need to test their effectiveness will increase. We market researchers need to broaden our capabilities so that we not only understand stakeholder needs, drivers and barriers to use, but also the actual usability and user experience (UX) of these technologies. This will help marketers design and develop tools which meet customers' needs fully and functionally.

Finally, we could also see a rise in Digital Opinion Leaders (DOL) who exert their influence through social media platforms. HCPs and patients alike utilise the digital channels to publish, share and exchange knowledge which in turn we as market researchers and our pharma clients should monitor closely, either through social media listening or including these DOLs in our research.

Once our lives return to normal, we don't expect face-to-face interviews to be replaced entirely by digital. In some markets there may even be a complete return to traditional methods. There are certain research objectives and therapy areas that require strong rapport or interaction, and in these circumstances, face-to-face could be more favourable. However, we envisage the virtual way of conducting research will become more established as we embrace more agile methodologies and come to appreciate that face-to-face communication is not the only way of extracting deeper insights.

We predict that the pharmaceutical industry will continue to evolve, expanding the depth and breadth of their use of digital methods in their marketing strategy, and also in market research. The growth will perhaps be greatest across emerging markets, which will continue to develop innovative approaches to reach target respondents in the years ahead.