



What's next? How behavioural science can support pharma's future

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It's been a distressing time for many people. The economic outlook looks bleak, healthcare systems are overwhelmed and customers are still adjusting to the 'new normal'. Marketers could be forgiven for being unnerved in these uncertain times... But the future could be bright.

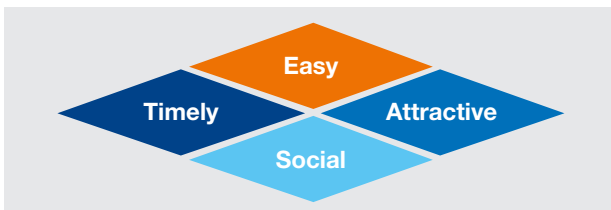
A light at the end of the tunnel?

A marketer's goal is to encourage customers to change their behaviour and adopt the brand. It can be a tough challenge. Yet the pandemic has required billions of people to change their behaviour in the blink of an eye. The reality is that customers have never been so open to change. For pharma marketers, understanding and shaping these changing behaviours could be key to differentiating and optimising their brand potential.

This is an opportune time to embrace behavioural science which, in recent years, has been successfully adopted and used by government and private enterprise as a means to enable favourable behaviours that benefit brands. It's essentially about tapping into the unconscious biases and heuristics we each unknowingly hold when making decisions. If we can understand these biases at play, then we can provide nudges to effect a positive change in behaviour.

The EAST framework

In our behavioural science work at Research Partnership, we utilise the EAST framework, a simple model proposing that to enable a behaviour it must be Easy, Attractive, Social and Timely.



Take telehealth as an example. Despite its benefits, many have long resisted the switch to telemedicine. A number of behavioural biases inhibited this adoption. One example is 'satisficing', the tendency to settle for 'good enough' rather than the best possible outcome. Another is 'loss aversion bias', where the pain of a loss is more than the reward of a gain. A third example is 'social norms bias', where we conform to the views of our peers. No one was adopting telehealth and, without advocates, the movement lacked traction.

Yet in spite of this entrenched behaviour, one billion telehealth appointments are now expected to be completed worldwide by the end of 2020. Using the framework, we can consider the factors that helped make the adoption of telehealth so rapid and so widespread:

Make it Easy: just pick up the phone; no need to go anywhere

Make it Attractive: save money through efficiencies; "Do it, or coronavirus spreads"

Make it Social: "Stay at home, Protect the NHS, Save Lives"

Make it Timely: what better time than a global pandemic?

Post-pandemic, the challenge for pharma will be identifying the underlying drivers and motivators that will need to be enabled to

create sustained behaviour change. Market research plays a pivotal role in unearthing those insights. By determining the biases that are driving and inhibiting customer behaviours and utilising the EAST framework, marketers can develop interventions that will result in a positive outcome for their brand.

Changing behaviours

Below we explore some of the behaviour changes that might emerge in healthcare over the course of the pandemic and consider which insights would be needed to support brand development.

Market changes: wholesale attitudinal shifts regarding the importance of vaccination and increased worry about catching or spreading other illnesses means vaccination has become an easier, more attractive and socially acceptable behaviour. Vaccines to protect against a range of diseases are likely to be more widely and more quickly adopted, by all customer types.

Physician behaviours: as many 'non-essential' treatments have been deferred, physicians may now start treating patients more aggressively in order to 'catch up'. Conversely, physicians may choose products with a longer half-life, or choose 'safer' options to minimise future hospital visits. How can we overcome this risk aversion or, indeed, benefit from it?

Which pathway and treatment choice shifts will we see? How will decision-making be affected? Where will it leave your brand? An understanding of physician behaviours will be critical.

Communication channels: as HCPs increasingly adopt the digital health interface during the pandemic, we'll see an increasing acceptance of these channels for promotional and non-promotional services. How will customers be looking to interact? Which messages will perform best? Which emotional and subconscious drivers can be leveraged on digital platforms? Customers are increasingly relying on the internet for information and interaction: How have digital HCP profiles changed? Will it open up new audiences? Digital engagement has also changed for patients: What are they engaging with? How? Where do they find information now?

Patient behaviours: patient journeys and behaviours will undoubtedly be affected. Asthma is a prime example where adherence has risen significantly. How have behaviours changed? How can we help sustain these? What are the touchpoints where should we engage, and what kind of messages and interventions should we use?

Behavioural insights

There are changes we envisage will stem from the pandemic but many we cannot predict. At Research Partnership we're supporting our clients to understand the wide-ranging impact of COVID-19 across healthcare. Insights will be key to navigating the path forward, but they must be underpinned by a strong understanding of behavioural science. We are in a time of great uncertainty, but there is light and opportunity at the end of the tunnel.

For more information on how we may be able to utilise behavioural economic theory in any upcoming studies please contact danc@researchpartnership.com