



3 innovations booming during COVID and how to adopt them successfully

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Pharma is facing a confusing and uncertain future, and no one can say how the industry might look in a year's time, or what the balance of digital and physical working might be.

Even those companies that responded well to the pandemic and quickly embraced digital can't know how long restrictions will last, and many are still revising their strategies and figuring out how best to position their digital offerings. The companies that will thrive are those who gather insights into how COVID is impacting the patient journey and physicians' behaviour and adapt accordingly. This will allow them to put robust, long-term strategies into place. Our own research has shown marked shifts towards digitisation in the industry. For example, findings from our Therapy Watch report 'Free thinking: The impact of COVID-19 on chronic disease management and the implications for pharma marketing' show 89% of physicians across the EU5 report replacing face-to-face consultations with virtual consultations during the pandemic.

This article will focus on three key areas where we expect to see accelerated innovation: new product development, digital communications, and 'around the pill' support. We have also identified some key strategies companies need to put in place to ensure they are successful in these areas.

New product development

Pharma was already seeing a slew of innovative product developments before the pandemic, and COVID has done nothing to slow the industry's digital adoption. One such development is the employment of artificial intelligence (AI) in the delivery of healthcare provision. AI technology has multiple uses but in particular we have seen it working alongside physicians to help minimise human error – for example by detecting early signs of disease or predicting treatment outcomes – thus optimising the patient experience. While many patients and physicians are keen to embrace AI, just as many are wary of it. Some physicians don't think AI can replace their years of practice knowledge, and don't like having less control over what happens to their patients. To overcome hurdles like this in product adoption, we use behavioural economic theory in the research, design and analysis we do at Research Partnership.

First, we need to understand the person's current behaviours, attitudes and beliefs, and the biases or heuristics that might be driving certain beliefs or behaviours. Then we look for ways to encourage a new behaviour. We apply the EAST behaviour change framework – which proposes that for a new behaviour to be adopted, it needs to be Easy, Attractive, Social, and Timely. For example, one barrier to adopting a new product might be the doctor simply doesn't want to learn a new technology. The EAST framework would suggest that we need to demonstrate the product is easy to use and will free up their time. It can be difficult to uncover the biases driving perceptions or behaviours, so we use projective techniques to delve deeper into the doctor's psyche. By understanding behaviour and demonstrating how to effect change, we can help our clients improve the physician and patient experience.

Communication

Similarly, the use of digital communication tools (e.g. e-detail and telemedicine) has increased during the pandemic. The advantage of these tools is they can be personalised based on an individual's preferences and behaviours, and we can enhance their usage by profiling the customers adopting them. In our market research, we may help clients profile customers in terms of their receptiveness to using digital forms of communication, or identify the aspects of the communication most relevant to them.

This will allow, for example, a physician to have a much more personalised experience of an e-detail if the information shown can be targeted to their preferences. Or, by understanding individual patient receptiveness to digital communication, our clients can help physicians optimise how they communicate with their patients.



Around-the-pill

Around-the-pill patient services such as wearables and apps have become more important over the year as a consequence of the restrictions on face-to-face interactions. As before, it is important to profile patients so you can ensure the digital offerings you're developing are being given to people who are going to benefit the most. For example, it's better to recommend a disease management app to someone who has already shown high engagement with their disease, such as by participating in online patient groups. You can then also educate physicians to recommend that digital product for a specific patient type. As well as a boom in around-the-pill tech, we're also seeing digital patient support programmes (PSPs) become more commonplace, as clients look for new ways to support patients outside of traditional doctor-led interactions.

Therapy Watch has found the steep rise in telemedicine has had knock-on effects on the patient journey. Patients are not presenting as early as they should be, either because they're scared to go to the hospital or because their appointments have been cancelled. Combined with doctors being less confident about managing complex treatments without regular in-person interactions, this means patients aren't getting the same treatment offerings they might have had pre-COVID. Our clients are therefore having to rethink and re-research the patient journey and understand at what points in the new pathway around-the-pill offerings would work best. PSPs can help to take the pressure off doctors – but companies must be aware of how such programmes might function differently in a COVID-19 world. As with other facets of pandemic business, gathering insights is key to this. We offer an evaluation service called PSP Enhance, where we gather information on patient unmet needs and get insights from all stakeholders, including physicians, upfront, to ensure clients design PSPs that have the best potential out of the gate.

User experience

The common throughline here is that user experience needs to be the prime consideration for all digital offerings. It's all very well rethinking your strategy and implementing digital offerings, but they must be useful and relevant for customers. A lot of ideas on paper end up lacking when translated into a digital product. This can be small things like making sure that the most relevant information for the user is on the front screen of an app, or that a device is measuring what is most important to the patient or physician. That's why user experience research is key – and that research needs to happen as early in the development process as possible. At Research Partnership's User Experience division, we collect feedback on both live digital assets and those in the design phase and help our clients to identify optimal site content, organisation and navigation.

An agile future

Keeping abreast of market research insights has the broader benefit of allowing companies to think on their feet and react quickly to changes in the situation. Agile working is only going to become more and more important as the pandemic progresses. Digital offerings that were already growing in popularity before the pandemic, like AI, are likely to stick around, as their benefits have been shown to outweigh people's concerns. What is more uncertain is whether the technologies that were forced into the limelight by circumstance – such as telemedicine and e-details – will remain popular post-COVID. Every individual patient journey is different, and every patient will have varying degrees of success with digital tools. We've certainly heard from both physicians and patients that they're not 100% comfortable with never seeing each other face-to-face. Most likely, we will be looking at a hybrid world that combines digital and physical interactions – but it's almost impossible to say at the moment what the balance will end up being. In the meantime, companies need to remain aware of the latest market research insights, and researchers like us need to make sure our research programmes are addressing ever-changing business questions from our clients.