EphMRA

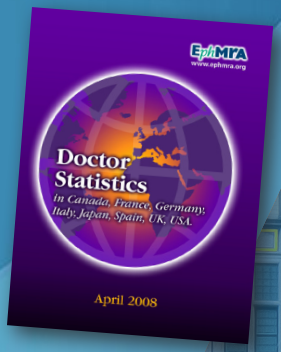
keeping members informed and involved

Welcome to the March 2020 News!

There is so much to report on across EphMRA right now – we have a very busy agenda and working hard on behalf of the members.

Doctor Statistics Report – last updated in 2008

This has always been a very popular report and an update is being undertaken and this first report will focus on France, Germany, Italy, Spain, Netherlands, UK, USA, Canada.



We are undertaking the update country by country and so it will be published as soon as each country is completed – we hope to get the first reports available in April.

Watch out for the launch!

Bernadette Rogers
General Manager

generalmanager
@ephmra.org

What's happening across EphMRA

- *AER Guidelines Update*
- *Young Professionals Conference Grant*
- *MR Excellence Awards*
- *Young Researchers Training*
- *Agile Research Conference programme*

research partnership

We are the largest independent healthcare market research and consulting agency in the world

We collaborate with clients from the global pharmaceutical, medtech and biotech industries, providing research intelligence and strategic recommendations that elevate healthcare brands and power their success.

researchpartnership.com

London Lyon Singapore
Boston New York Philadelphia San Francisco

The management of the Association is undertaken by the Board, which derives its authority from the members, and is responsible for fulfilling the objectives of the Association having regard to the decisions taken by the members at the Annual Meeting.

The Board comprises the following members:

- President
- Vice President
- Past President

Members of the Board for 2019 - 2020 are shown below.

Karsten Trautmann
Merck KGaA
Board Industry Member,
President

Thomas Hein
Thermo Fisher Scientific
Industry Member,
Past President

Marianne Fletcher
Pfizer
Board Industry Member

Nicola Friend
AstraZeneca
Board Industry Member

Gabi Gross
Thermo Fisher Scientific
Board Industry Member

Richard Head
Research Partnership
Board Agency Member

Amr Khalil
Ripple International
Board Agency Member

Stephen Potts
Purdie Pascoe
Board Agency Member

Xander Raijmakers
Eli Lilly Nederland BV
Board Industry Member

Marcel Slavenburg
SKIM
Board Agency Members

Christophe Van der Linden
suAzio
Board Agency Members

Charles Tissier
EphMRA
Treasurer (non voting)

Bernadette Rogers
EphMRA
General Manager
(non voting)

What's New in EphMRA?

Thanks to everyone who applied for one of our exciting and new Young Professionals Conference Grants for Antwerp, 23-25 June 2020.

The entry criteria was:
Working in healthcare market research for less than 3 years?

How to Win a Free Conference Place

Criteria

1. Working in healthcare market research for less than 3 years
2. First time EphMRA Conference delegate
3. Open to all member companies -both industry and agency - and it's not limited to 1 application per company
4. Up to 5 free places available.

How to Enter*

1. Email a 1 page PDF with your background details
2. Tell us how attending the Conference will help you in your role
3. Tell us how EphMRA will benefit from you attending

Annual Conference Antwerp- 23-25 June

With the early bird fee deadline now passed, there is still plenty of time to register for our flagship conference in June, so please look at what's on offer in Antwerp and join us for another outstanding event. https://www.ephmraconference.org/ . We are regularly adding new content to the website, so have a look at our blogs to learn more about the event and what you will miss if you aren't there in person!

The new look home page on the website makes it easier than ever to register for the conference and many categories of registration no longer require a code, making registration very simple. We are also offering day tickets for the conference, so that you can attend for a shorter time if you wish, whilst still getting the benefits from networking and listening to some outstanding content.

It seems like the blink of an eye that we were in Warsaw but this year's conference is just around the corner and we have had very positive feedback about the programme for this year as well as higher registrations for the event compared to 2019. Agency Fair booths are going fast, so if you've not yet booked your delegate places and booth, don't delay!

Some of our speakers have been very keen to share with you what a small snapshot of what they are going to talk about in June, so they have been busy filming some short videos just to whet your appetite and encourage you to attend this year. Take a look to see why you need to be there in June to listen to their sessions in person!

- https://youtu.be/Y2q1KtZ8IC8 - David James J+D Consulting
- https://youtu.be/B9LANTF7Bak (Eric Mathlener)
- https://youtu.be/emsQlcAwjkk (Andrew Grenville)
- https://youtu.be/4ACURRMe_Mc (Sue Coyne)

There are some great sponsorship options still available if you would like to raise your brand profile at the conference and make your presence felt, so here are just a few of the sponsorship ideas to sponsor:

- An early morning run around Antwerp Zoo – right next to the Conference Center
- Physical signage throughout the venue – a very high profile item, as your brand name will be on signage throughout the whole conference in many places around the venue
- Badge printing kiosk – which will be located in front of the registration desk so that everyone will see your brand name when they pick up their badge throughout the conference

Thank you to our 2020 programme committee who are steering the papers:

Letizia Leprini
Customer Business Insights
Bayer Pharmaceutical Division

Georgie Cooper
Partner
Basis Health

Mike Pepp
Account Director
Blueprint Partnership

Stephen Potts
Director
Purdie Pascoe

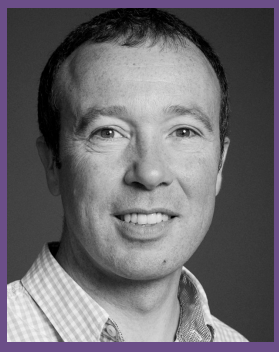
Xierong Liu
Director
Ipsos Healthcare

Sarah Phillips
Senior Principal, IQVIA
Real World Insights

Dennis Engelke
Director, Business Analysis & Insight
Jazz Pharmaceuticals

Tracy Machado
Director
Phoenix Healthcare

Erik Holzinger
Founder & Director
groupH



Roy Rogers
Partner
Hall & Partners

Carolyn Chamberlain
Commercial Director
Blueprint Partnership

Amr Khalil
Managing Director
Ripple International

08.30 - 09.00 **Pre-conference networking in the Agency Fair - Atrium**

09.00 - 09.30

Agile: Focus on Operations

Speaker: Yuliya Fontanetti, Senior Director - Operations and Compliance, HRW

Everyone is talking about agile, since its inception in the technology industry, the desire to produce better, more customer-focused outputs faster and more effectively, is what virtually every industry has been striving for. Pharma is no different. Customer centricity, putting patients at the heart of medicine's design as well as the fast-paced world we live in today, mean that pharma companies have to adapt to the changing environments, creating solutions that are current and relevant for their target audience. Benefits of agile are clearly too great to ignore, however, operationally, there are a number of challenges that need to be considered when undertaking an agile project

This paper will explore some of the intricacies of agile approach, starting from respondent recruitment, where innovative solutions are required to meet challenging timelines; material design and translation execution, both of which requiring careful quality control with increased turnaround times; not forgetting the value of an outstanding moderator, who is able to really understand end-client's needs and become an extension of clients' vision whilst completely immersing themselves in the project. However, by far, the most fundamentally-crucial part of agile project design to consider as early as the project kick off is compliance, building compliance considerations into the project from the kick off, involvement of medical and approval teams from the get-go and re-approvals following material iteration, all of which need to become part of a carefully orchestrated execution that will, no doubt, deliver relevant, customer focused insights to our clients.

At the end of this paper, you will, hopefully, come away with some practical solutions on overcoming some of these challenges and being able to embrace agile approach, whilst having the necessary tools to allow the project to become a success.

09.35 - 10.05
Okapi Room

The New Frontier of Agile Research: Qualitative Research and Quantitative Patient Research Insights in an Instant

Speakers: Paul O'Shaughnessy & Nick Wain, M3 Global Research

Chair: Georgina Cooper, Basis Health

In 2020, both quantitative and qualitative market research insights should be deliverable in 48-hours, M3 Global Research firmly believes this, and are leading the charge. Businesses simply cannot accept the naysayers belief that "we can't do this" or "it will take 12 weeks", it can't work that way any longer. The insights industry needs to move faster and offer that ability. Join us as we work toward the solution, change the thinking and how to use best-in-class technology and panel to solve your business needs.

10.10 - 10.40
Okapi Room

Transforming your patient journey, a new Agile approach

Speakers : Jonathan Weiser, BuzzBack, Rob Seebold, BuzzBack, Julie Loving, TherapeuticsMD

Chair: Xierong Liu, Ipsos Health

In a TED-Talk style format, this presentation will demonstrate how to transform your patient journey research to a more agile, patient-centric approach.

The 3 A's are now de facto in market research today and ingrained in our vernacular: AI, Automation, Agile – with Agile being the current operative. Agile IS here to stay but is less about faster and cheaper and more about embracing patients to empathize, understand them as human beings, and build a better patient experience.

Oh, of course with agility!

In this session, BuzzBack and Julie from TherapeuticsMD will demonstrate a proven patient journey approach, integrating interactive, mobile, video and social listening elements for a 360 visual, view to patient understanding.

10.40 - 11.20 Networking break and coffee in the Agency Fair - Atrium

11.20 - 11.50

Patient recruitment and its complexity

Speaker: Gabriela de Paula Prado, Demanda Pesquisa e Desenvolvimento de Marketing, Brazil

The aim of this paper is to discuss patient recruitment, particularly in Brazil. Patients are countless and diverse, facing different pathologies at various stages.

Chronic patients with well-known, high-incidence pathologies are easy to find, but what about rare patients? Or those who are reluctant about exposure or still, those who are not aware that they suffer from the pathology we seek to study?

We will focus on different types of patients, their unique characteristics and needs when approached and interviewed. We will discuss unexpected situations, illustrating them with practical case examples that may help you understand what works best to get in touch with each of these patients and have them engage in your studies.

In addition, we will briefly address the current research context in Brazil, accepted methodologies, response time, as well as the offer of incentives, physician referrals, patient associations, and other factors that influence patient participation and adherence to research projects.

12.15 - 12.45

Penguin (Atrium) Agency Session 9	Lemur (Atrium) Agency Session 10	Dolphin (Atrium) Agency Session 11	Gorilla 3 Agency Session 12

12.45 - 13.35 Networking lunch in the Agency Fair – Atrium

13.35 - 14.05

Creative approaches to patient recruitment

Speaker: Grzegorz Stanczyk, Health Operations Director, Hall & Partners

Recruitment is vital to the success of market research and yet many studies struggle in finding or successfully engaging with the right participants.

Patient recruitment is especially challenging, given most diseases have relatively low incidence rates in the overall population.

This paper will outline creative ways to identify, target and engage patients in order to conduct successful market research. It will also highlight the main challenges likely to be faced at various stages, with possible solutions relating to each.

Most typical challenges

Patient studies tend to be more challenging:
- Rare disease areas, including specific and advanced stages
- Detailed screening criteria, including types and lines of treatment
- Unique markets
- Patients not being MR friendly, e.g. old

Patient-first engagement

Recruitment strategy needs to put patient needs first:
- Choosing the right methodology
- Increasing participation by being transparent, showing empathy and fostering trust
- Verification process

Identifying & targeting

Effective ways to locate patients for research:
- Determining feasibility and eligibility criteria
- Recruitment via qualitative fieldwork agencies and using online panels
- Social media recruitment
- Recruitment through referrals using HCPs or Patient Associations

14.10 - 14.40

Data Collection in Africa – challenges and considerations

Speaker: Asebhor Ebhomenye, ABA Healthcare Africa

The pharmaceutical market research industry in Africa is emerging with only recent interests amongst Multinational Pharmaceutical Companies compared to the long history of traditional MR buyers such as Unilever and P&G on the continent; hence, the industry is faced with challenges of limited talents and stakeholder acceptability.

Questionable techniques, long interview durations, poorly designed tools, poor interviewing skills of interviewers, delays securing Ethical Approvals, limited HCP population, low PV compliance reporting rates and weak QC process compromise data quality.

A more experienced workforce using Agile solutions and better collaboration between the industry players and the principals would go a long way to address these gaps.

14.45 - 15.15

Ipsos paper

Speakers: Emma Hargreaves and Eunice Vicente

Topic: TBC

15.30 - 15.35 **Okapi Rooms - Conference Closing**

Special 500 euros one day registration fee only for those working in Ops and Field. Email: generalmanager@ephmra.org **for full T&Cs.**

Sponsor EphMRA 2020 Conference

Thank you to all of the Agencies that have snapped up our Conference sponsorship packages so far.

We do have some great opportunities still available - so don't miss out on getting your brand in front of the movers and shakers of the healthcare market research industry.

Sponsorship Opportunities - What's on Offer

SOLD

GLocalMind - Delegate bag and A5 pad
Ipsos Health - Badge lanyard
M3 Global Research - Water bottles and water stations
Research Partnership - Conference photographer
IGV Marktforschung GmbH - Delegate badge
Survey Healthcare - Digital lectern branding and welcome/ registration desk and wall
AplusA Research - Conference WiFi password
suAzio - Belgian Beer Bar
QualWorld - 1 of the 4 door panels
QualWorld - Polo shirts for hosts
Ripple International - A5 pad for delegate bag.

AVAILABLE

A sponsored **early morning run/walk through the zoo**
Conference signage
Badge printing kiosk signage
Branded door panels on the front of the FMCC (3 available)

Four Business Benefits of Sponsoring EphMRA Conference

If you're new to the Conference or haven't sponsored an event before, here are four smart reasons to add it to your marketing strategy.

1. Brand Awareness

Hundreds of senior-level delegates from the healthcare industry across the world attend the Conference – and many more see Conference communications such as our emails, social media and Post Conference News, as well as the Conference website. Your brand will be highly visible to these influential opinion-leaders and decision-makers.

2. Industry Goodwill

When your brand is associated with a high-profile event, people form positive opinions about your business. Sponsoring at the Conference shows that your company is reliable, reputable and interested in supporting the industry – and people respond well to that.

3. Business Relationships

To get maximum value from attending the EphMRA Conference, it makes sense to really get involved. Taking a sponsorship package is a fantastic conversation-starter and an interesting topic to discuss when networking.

4. Stand Out from the Competition

In a crowded marketplace, you need to do something different to stand out and get noticed. A sponsorship package that people can see, touch and experience gives a lasting impression that helps to keep your business at the forefront of their minds. You also demonstrate a commitment to the healthcare industry and to supporting your membership association, EphMRA.

"Investing in an EphMRA sponsorship is a great tactic I have used for many years now, for visibility and reinforcement of our brand. Our participation in EphMRA allows us to both share our own expertise but also exposes us to new insights and connections. I've always greatly appreciated active participation in EphMRA events – a chance to align with long-standing friends and establish new acquaintances, alike!"

Jessica Gates, Senior Vice President, Global Marketing & Communications, Custom Healthcare, Ipsos (Sponsor of delegate lanyards)

How To Get Involved -

For more information read our blog and download our Sponsorship Opportunities Brochure.

To enquire or book a sponsorship, please contact Caroline Snowdon, Events Manager at events@ephmra.org

Don't delay, we expect these opportunities to sell quickly!

2020 is flying by! Spring is in the air and EphMRA is busy planning a wide range of events for you to attend this year, which we hope will inspire you and provide you with great networking opportunities.

London meeting 2020

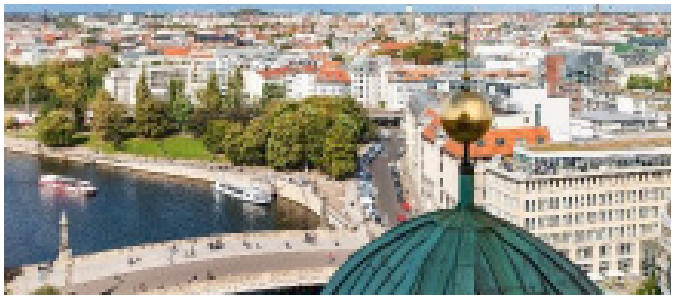
The London meeting is now over but we had some outstanding speakers from outside our industry to share some innovative ideas with us and explore how these could be applied to the pharma/healthcare sector in its broadest sense. A summary report of the meeting will soon be available on the EphMRA website, so please visit the Resources page to download this as a pdf when it's available.

A special thanks to all of the invited speakers for the day who gave up their time to prepare some thought provoking presentations and be at the meeting to share their insights – particularly in the round table World Café discussion session at the end of the day. We would also like to thank the convenors of the meeting, who worked very hard to put together the programme:

- Alex Marriott, Cello Health
- Anna Garofalo, Janssen EMEA Market Research Centre of Excellence
- Gayle Hughes, Pfizer
- John Grime, Strategic North

We will soon be planning the London meeting for 2021, so watch this space for announcements about this event. If you have ideas for what you'd like to hear at the next meeting, please get in touch with us – we are always keen to have your thoughts and ideas for meetings. Please contact Caroline Snowdon, Events Manager – events@ephmra.org

Germany meeting - Tuesday 28 April, Berlin



Our next meeting in Germany takes place at the end of April at a new more central Berlin venue - Park Inn by Radisson Berlin Alexanderplatz - Alexanderplatz 7, Berlin 10178 Registrations are open to attend the meeting and the programme is available on the website - https://www.ephmra.org/events-training/events/germany-2020-event-berlin/

The meeting will focus on 'making sense' in our world and we very much hope that you will be inspired by the day.

Please note that the meeting is held in German, with no translation available. All presentations and discussions will be in German.

The day will provide plenty of opportunity to listen to some great papers as well as the time to discuss issues relating to ethics in Germany which we know are of high importance to our members. We will be collecting members views on the 'hot' ethics topics in a short online questionnaire, so watch out for this, as we'd love to hear your thoughts.

Thanks to our convening group, who always work hard to make this meeting a memorable, engaging and informative day:

- Yvonne Engler, Bayer Pharma AG
- Johanna Glaser, Point Blank Research
- Katja Birke, Produkt+Markt
- Janine Ruhl, Sanofi

Switzerland Meeting - Tuesday 29 September, Basel

We will again be returning to Basel in September for our 4th meeting in Switzerland and will also return to the Hyperion Hotel, which was an excellent venue for the meeting last September.

The convenors are still working on the overall theme for the day, so if you have some ideas which you'd like to share with us, please do get in touch, as we always like to listen to your thoughts. Please contact Caroline Snowdon, Events Manager events@ephmra.org

We would like to thank the convenors for the meeting for their hard work:

- Letizia Leprini, Bayer Pharmaceuticals
- Sandra Schoebel, Bristol-Myers Squibb
- Angela Duffy, Research Partnership

We are actively looking for a 4th convenor to join the team, so if you are from an agency and would like to apply to join, please contact Caroline Snowdon, Events Manager events@ephmra.org

Young Researchers Programme

Free Online Training for Researchers New to the Industry

Are you new to the industry? Or just starting your career in healthcare market research?

As an EphMRA member, you can take advantage of our free Young Researchers Programme - online training designed especially for less experienced colleagues (and, no, you don't need to be young to do it).

Our experts in EphMRA's Learning and Development Committee have created this helpful programme to give those who are new to pharma MR a solid overview of the industry.

Our first webinar was on the 7th November!

What's Included

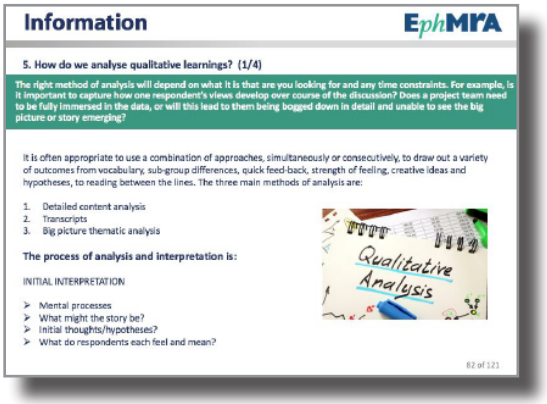
3 Online Training Courses

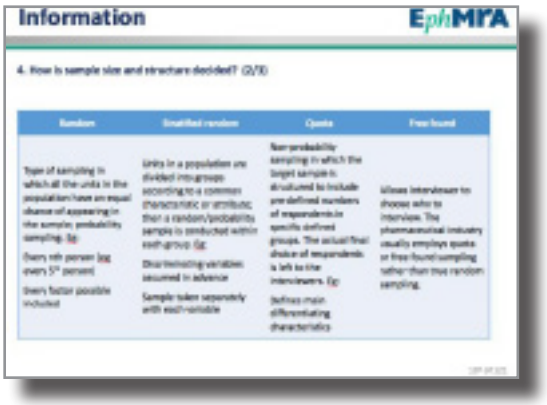
1. Introduction to International Pharma MR
2. Research through the Product Lifecycle
3. Managing a Research Project.

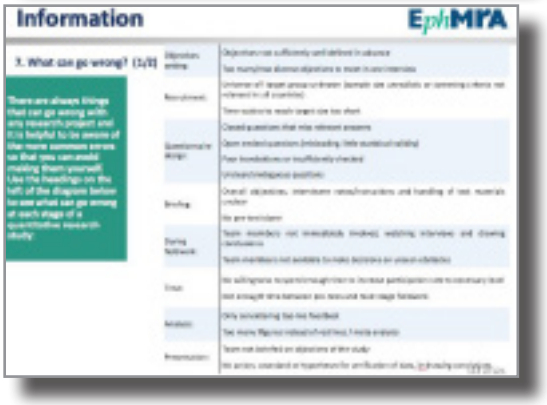
4 Webinars with Industry Experts

1. Basic Skills: Project and Product Lifecycle
2. Positioning and Messaging
3. Patient Research: Fieldwork
4. Projective Techniques.

Here are some example pages from our first online training module.







Need to Know

This valuable Training Programme has been carefully designed by senior representatives from across the industry who give their time as part of our Learning and Development Committee

- Outlines of the training modules and webinars are available on our website .
- The first webinar was on 7 November, 13.30 - 14.30 UK time
- Don't miss out on this free member benefit - get in touch with Bernadette Rogers to express your interest.

New online Training Platform

Each member, on logging in will see they have their own individual training dashboard where you can see the courses and tests available to you. All these are free of charge and you can save and download your certificates.

The training modules available to each member are:

A. EphMRA Ethics Online Training Modules and Competency Tests

1. Code of Conduct Training Course

2. AER Training Course

3. Code of Conduct Competency Test – complete test

4. Code of Conduct Competency Test – supplementary test EphMRA members who are also BHBIA members will have the opportunity to take this supplementary test which covers EphMRA specific requirements and, in combination with the BHBIA Legal and Ethical Guidelines Competency Certificate, meets EphMRA's full requirements.

5. AER Competency Test – complete test

6. AER Competency Test – supplementary test EphMRA members who are also BHBIA members have the opportunity to take this supplementary test which covers EphMRA specific requirements and, in combination with the BHBIA certificate, meets EphMRA's full requirements.

B. EphMRA Healthcare Market Research Skills Pharma Online Training Courses

1. Introduction to International Pharmaceutical Market Research

The role of market research within the pharmaceutical industry is paramount to the marketing success of pharmaceutical products. All pharmaceutical companies need to maximise their products' performance within the marketplace, and this requires a high level of market research information and analysis. Market research has always been key to the success of pharmaceutical companies and products, but today and in the future it is even more important and the importance will certainly increase.

2. Managing a Research Project

Pharmaceutical companies are always facing new situations. The competitive business environment in which they operate is constantly changing. Companies develop new products and new promotional strategies. Prescribers and users respond to changes in economic, social and legislative systems by changing their product use patterns. New organisations, affiliations and initiatives are continually being born. All these provoke management to ask questions. These questions need answers. Answers that you as a market researcher are expected to find. This course is designed to help you to improve the quality of research you do, avoiding the common pitfalls that lie between a brief from your in-house client and reporting the results of your research.

3. The Role of Research through the Product Lifecycle

This course aims to demonstrate why market research is important and provides an overview of different methodologies that any project might incorporate throughout the lifecycle of a product. The course also looks at the key influencers to research and most importantly effective presentation delivery of the research.

Take a look at the member benefits on offer.

EphMRA is a professional association for International Healthcare research and insights professionals supporting you at every stage of your career.

Help encourage excellence and continue driving the International Healthcare Industry forward with a professional association dedicated for over 50 years to developing, regulating and promoting data, research and insights professionals.

Your membership gives access to a range of benefits to support you as the business partner of choice for your employer and business.

PROFESSIONAL STANDARDS

CAPABILITIES & DEVELOPMENT

CONNECTED COMMUNITY

EXPERT CONTENT

YOUR VOICE – YOUR COMMITTEES

Get in Touch

generalmanager@ephmra.org

Always happy to hear from you!

It's great to have you as a member – here's a brief overview of some of the key next steps.

Visit the web site and apply for a members access to take advantage of all the resources there

https://www.ephmra.org/register/

Take our training courses (Log in – members area – online training)

A. EphMRA Ethics Online Training Modules and Competency Tests
1. EphMRA Code of Conduct Training Course
2. EphMRA AER Training Course
3. Code of Conduct Competency Test - complete test
4. Code of Conduct Competency Test - supplementary test
5. AER Competency Test - complete test
6. AER Competency Test - supplementary test

B. EphMRA Healthcare Market Research Skills Pharma Online Training Courses
1. Introduction to International Pharmaceutical Market Research
2. Managing a Research Project
3. The Role of Research through the Product Lifecycle

Follow EphMRA on LinkedIn and share the updates with your colleagues

https://www.linkedin.com/company/ephmra/?viewAsMember=true

Like EphMRA on Facebook and share the updates with your friends

https://www.facebook.com/pages/category/Nonprofit-Organization/Ephmra-339677369945840/

Ask to go on the emailing list for EphMRA

Email us at generalmanager@ephmra.org

EphMRA
Agency Member 1.10.19 – 30.9.20

This is the logo for you to use on your web site etc to denote membership.

Membership year

As a reminder – your membership runs from 1 October to 30 September the following year. There is automatic renewal.

Join us at our next Conference

23 – 25 June 2020
Find out more here:
ww.ephmraconference.org

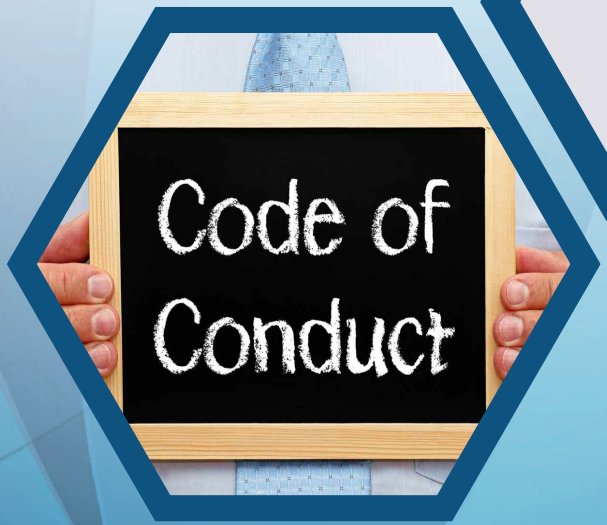
Chapter Meetings

We hold 3 x one day meetings per year – join us to meet and network with colleagues as well as hear cutting edge papers.
More details here -
https://www.ephmra.org/events-training/events/

The Ethics Committee is planning to update the Adverse Event Reporting Guidelines and has established a working group to address this. The Guidelines are being streamlined and updated.

Empowering healthcare market researchers to add value

EphMRA
www.ephmra.org



Get in Touch
generalmanager@ephmra.org
Always happy to hear from you!

EphMRA
www.ephmra.org

How the Ethics Committee supports its members

Membership of EphMRA provides a host of opportunities to support the highest standards of professionalism in healthcare market research. The Ethics Committee is the main driver for maintaining these standards and is dedicated to supporting members in their understanding of their ethical and legal responsibilities.

Key Member Benefits

only to members. We encourage our members to engage, add their voice, be involved and be a part of our community, and we hope these benefits give you the opportunity to get more value from your membership.

1. Code of Conduct

At the heart of the work the Ethics Committee does, is the Code of Conduct, which provides members with a framework for best practice in safeguarding respondents' rights and addressing key industry issues. Compliance is an area which needs to be dealt with on a daily basis and the Code is key to helping our members in the pursuit of excellence in standards.

The key benefit of the code of conduct to you as a member, is keeping up to date via one central document with the complex, demanding and fast-changing compliance environment.

Furthermore, as an EphMRA member, you can help support the success of the code by helping to ensure that all your colleagues understand and respect it.

Key benefits

- a single point of reference for legal and ethical issues
- comprehensive and up to date ethical and legal guidance that members can use when running multi-country, primary and secondary healthcare market research
- helps to define and safeguard the rights of respondents, protecting data integrity alongside the rights of respondents
- covers countries across Europe as well as Japan, Korea, Russia and the USA
- updated annually

2. Adverse Event Reporting (AER) guidelines

Sitting alongside the Code of Conduct are the Adverse Event Reporting (AER) guidelines, which detail the scope of market researchers' adverse event reporting responsibilities and the requirements of the reporting process.

EphMRA's AER guidelines are based upon legal requirements and all members should understand and adhere to them whilst ensuring that others involved in market research, including colleagues, sub-contractors and suppliers, abide by them too.

As a member you can keep up to date with changes and updates to the guidelines via the EphMRA website so that you have one point of reference to check you are fulfilling your legal requirements.

3. Dedicated free enquiry service

The Ethics Committee is committed to making the Code of Conduct work for its members and to support this work, it welcomes enquiries regarding the code from its members. This is a great opportunity for members to have a voice in helping to shape and improve the code and ensures that the channels of communication are always open.

Once an enquiry is submitted (via the website), it will be assessed and a written response will be issued usually within 3-5 working days. In some instances EphMRA may make contact to request further information or for clarification on a particular point.

The committee aims to publish responses to enquiries under the FAQs section on the website for the benefit of all members.

Here is an example of the type of enquiry our Ethics Consultants have answered:

Enquiry:
We've been receiving from few of our clients now a request to start reporting Incomplete Cases (together with AEs). However, we know that there are 4 criteria on which we have to be reporting to our clients, and they are as follows:

"For the purpose of reporting AEs, **the minimum data elements** for a case are:

1. Identifiable reporter
2. Identifiable patient or patients
3. Suspected adverse event
4. Suspected medicinal product."

However, what we see in our client requirements are:

Definition (provided by the client, quote):
"Incomplete Case" means a case that does not contain minimum criteria for reporting as defined by the Applicable Law (i.e., an identifiable subject/ patient, identifiable reporter, suspect medicinal product, and event), but at a minimum contains a suspect medicinal product and a suspect event. Such reports are entered on the safety database as potential cases of value for signal detection purposes.

Requirements for us:
Along with other regular AER requirements, this is what they are asking (quote): "and **Incomplete Cases,** in a format as agreed upon by Supplier and Buyer. For the avoidance of doubt, all **Incomplete Cases should** also be collected and forwarded immediately, but in no case later than twenty-four (24) hours from the date of collection by Supplier."

Could you please advise what is EphMRA's stance about Incomplete cases reporting and how should we, as MRO, proceed in this instance, as the requirement is completely new to us?

4. Key Points Booklets

1. **Market research (MR) for non market researchers.**

These key points are designed to provide an easy to read guide to help non market-researchers who play a role in reviewing and or approving MR materials, understand how EphMRA's Code of Conduct guides the legal and ethical aspects of market research, allowing approvers to focus their input effectively and have confidence in the process.

2. **Market research, ethics approval & non-interventional research.**

These key points are focused on supporting you when ethics approval is discussed in relation to market research. The main point being that market research does not require Clinical Research Ethics Committee or Independent Review Board approval.

3. **Market research with patients and carers.**

These key points are designed to help international market researchers who are involved in market research with patients and carers. It covers how patients and carers should be treated; data collection and how data is used; dealing with sensitive topics and market research involving children.

4. **Market research and incentives.**
These key points cover the dos and don'ts of offering incentives to respondents from ensuring they are appropriate, how to share and store the data through to understanding the varying guidelines in different countries.

5. **Market research and social media.**
This guide identifies and describes the most important considerations for market researchers when they are looking to use data from social media sites. The fact that information is available and accessible on social media sites does not mean it can be used for market research. The guidelines refer to a wide range of examples including; online forums; blogs; social networks e.g. Facebook; video sharing e.g. You Tube and group communication platforms e.g. Twitter.

6. **Market research and emobile.**
This key points guide aims to outline the key considerations when planning and undertaking market research via wireless technology on mobile phones or devices. It covers informed consent and privacy statements; disclosing list sources; use of unsolicited emails; data security; cookies; use of software.

7. **What is market research - definition.**
This guide clarifies the definition of market research and clearly indentifies what market research is and is not and how market research differs from non-interventional studies (NIS).

8. **Testing products & devices in market research.**
This document provides guidelines to those who need to obtain customer feedback on products or devices and defines the different requirements depending on the category of medication.

9. **Adverse event reporting (AER) from market research.**
These key points explore the obligations of reporting adverse events, the sub-categories of adverse events, the reporting criteria of an adverse event and how to collect and report AEs during market research.

10. **Disclosure requirements.**
This gives an overview of the disclosure requirements and implications for market research taken from section H of EphMRA's Code of Conduct. It refers also to national disclosure laws in difference countries.

EphMRA
www.ephmra.org

5. Ethics online training & competency tests

Exclusive to members are our ethics online training modules, which include training on the Code of Conduct and AER guidelines. There are supplementary tests available to BHBIA members with competency certification. The training takes you through understanding the scope, purpose and basis of the code and outlines AER requirements.

The training courses are all tailored to meet different learning styles and requirements. Learning takes place in your own time, at your own pace and allows you to select which aspects of each course you wish to focus on at any given time.

Certificates are issued to prove that you are dedicated to upholding the highest standards in market research.

The training modules available free to members are:

1. Code of Conduct Training Course

2. AER Training Course

3. Code of Conduct Competency Test – the complete test, which fulfils EphMRA's requirements

4. Code of Conduct Competency Test – supplementary test. EphMRA members who are also BHBIA members will have the opportunity to take this supplementary test, which covers EphMRA specific requirements and, in combination with the BHBIA Legal and Ethical Guidelines Competency Certificate, meets EphMRA's full requirements.

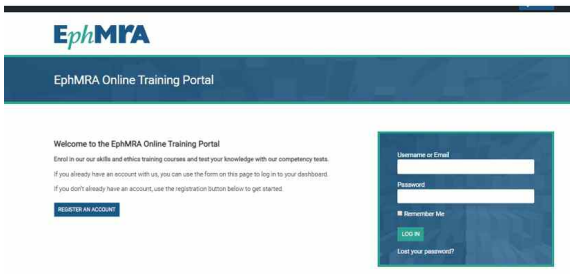
5. AER Competency Test – the complete test, which fulfils EphMRA's requirements for AER training.

6. AER Competency Test – supplementary test. EphMRA members who are also BHBIA members have the opportunity to take this supplementary test, which covers EphMRA specific requirements and, in combination with the BHBIA certificate, meets EphMRA's full requirements.

Our aim is to encourage the highest standards within market research amongst our members at a time when more than ever before, researchers need to be equipped to safeguard the rights of respondents and to protect data integrity.

Members can connect here:

https://ephmra.smartlms.co.uk



6. Ethics update webinars

We hold dedicated ethics webinars regularly in order to keep our members up to speed with developments in this area. Members are able to access them on a complimentary basis through our website.

In case you miss a webinar you can always find the slide deck and recording as a member resource.

7. General updates and other resources

We hold dedicated ethics webinars regularly in order to The Ethics Committee also produces regular updates and guidance for members on issues affecting the industry.

A prime example of this is the guidance produced on the implications of the GDPR for international healthcare market research and how that translates to a market research context.

The following updates and resources are available free to members through the website.

- Conference and meeting papers
- Country differences grid
- EFPIA Disclosure Code requirements
- AER record keeping checklist
- Topic-specific summaries of country differences (eg Incentives – a guide to see at a glance what incentives are allowed per country

You can find a full list of publications on the website.

Thanks to our Ethics Committee.

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"Alexa, process this data for me" 3 ways the AI evolution is redefining how we collect market insights

Harrison Gaiger
Marketing Manager, Research Partnership

Amazon's digital voice assistant Alexa is much more than just a convenient tool for setting reminders, streaming music and controlling the lights in our homes. It is a very real application of Artificial Intelligence (AI), a technology that has fast become an integral part of our daily lives.

With all of the hype surrounding the more attention-grabbing applications of AI such as self-driving cars and super human-like robots - which most commentators say will be commonplace soon, it can often be difficult to appreciate just how much AI affects what we're doing right now. We have all become so accustomed to AI without even realising it e.g., the autocorrect function on our smartphones and the automatic tagging of friends in our Facebook photos are both powered by AI.

Because of its promise to do a variety of things that humans can do - only better, AI's transformative power has made inroads in a wide range of industries, not least healthcare and pharmaceuticals. From clinical research, to drug development, early detection and treatment, AI is revolutionising how these sectors work to improve patient outcomes. For patients, particularly those with chronic diseases, AI can help them to become much more compliant. Virtual assistants that send out digital voice reminders can be very effective in simply prompting patients to take their medication regularly and on time.

On the commercial side, it now plays an increasingly pivotal role in the process of gathering market intelligence and insights, helping to gather more accurate, in-depth information more quickly. Faced with increasing pressure to produce superior results, market researchers are using AI as a tool to help generate insights in a multitude of ways. Not only is it saving processing time, it is helping to find patterns in the data at a scale not previously possible. Right now, there are three ways the AI evolution is redefining how we collect market insights: engagement, analysis and decision-making.

Engagement: Effective market research relies on the continued cooperation of respondents with the research process. To get the most effective insights from patients, physicians and other key stakeholders, researchers must first ensure they are fully engaged – as a rule of thumb, higher engagement results in better quality data. However, ask any researcher what a key challenge of theirs is and they will quickly tell you - respondent engagement. The industry had been crying out for new methodologies and research tools that would help ensure respondents are more enthusiastic about participating in market research studies.

Over recent years we have seen market researchers use AI technology to deepen engagement with respondents. New digital methods for data collection such as online surveys, virtual focus groups and online communities have become much more effective thanks to AI. Chat bots and AI-managed interactive surveys are among a range of innovative research tools that are helping to upgrade the way researchers engage with their respondents. Using predictive modelling and principles of behavioural science, AI helps to both lead and engage in conversations, change the course of discussions depending on the topics that arise and 'mould' the design of questionnaires in response to previous answers.

Analysis: Advanced data and open-ended text analysis are two further examples where AI technology is making an impact in the healthcare market research industry. Processing large, unstructured datasets such as open-ended survey responses would have previously taken researchers a considerable amount of time to complete. Today however, AI is empowering researchers to finish these tasks in a much shorter amount of time. By applying Natural Language Processing (NLP) in combination with statistical analysis techniques to large volumes of written data, AI is helping to distil quantitative results. Tools such as Google's Natural Language API can recognise the category of text, analyse syntactic structure, and offer insights into the overall sentiment of what a respondent has said about a given topic. Similar platforms offer a whole host of other analytic tools including data cleaning, blending, document clustering and exploration, term document matrixes and text enrichment. When applied on a large scale, these can drastically reduce the amount of time it takes to analyse qualitative responses.

Facial analysis – which leverages AI to understand people's reactions to visual stimulus, is also being used to enhance the evaluation of healthcare communication materials. Artificial Emotional Intelligence (AEI) developed by emotion measurement company Affectiva can help detect emotional and cognitive states from faces and voices. Having analysed over 5,000,000 faces and 24,000 adverts to understand how people respond to digital stimulus such as advertisements and websites, they are able to help brands improve their advertising and marketing messages. WTheir technology has been widely adopted by the consumer industry and can, with some adaptation, work well in the healthcare environment to evaluate communications materials aimed at physicians, as we have experienced working successfully with pharmaceutical companies.

Decision-making: With AI, it is now possible for pharmaceutical companies to use their wealth of market research data to make strategic business decisions. Machine learning, which uses statistical techniques to give computer programmes the ability to "learn", is playing a huge role in optimising business operations. By integrating primary and secondary data sources and applying various modelling techniques, AI can identify patterns that might otherwise go unrecognised and can help marketers make quick tactical decisions. In addition, the technology can predict certain behaviours by determining how key variables will likely impact decisions, allowing marketers to evaluate different options and determine which will produce the best outcomes. This powerful tool is helping researchers to find actionable insights, project the future demand of products and forecast sales much further into the future.

AI is developing much faster than we thought possible, and speeding up exponentially. It is safe to say the power of AI is no longer limited to tech giants aiming to change the way we entertain ourselves using talking boxes in the corner of our rooms; it is actively shaping the way we live and work. New tools for engaging with respondentWWs and analysing market research data will continue to evolve over the coming years. It is important for healthcare market researchers to understand how to leverage these new technologies to gather actionable insights. Those that do keep up with the most cutting-edge tools will gain a competitive advantage and stay ahead of the game.

Day One

AI powered insight to generate ideas at superhuman speed

Written by Hannah Mann – Founding Partner at Day One

It is getting harder for brands to stand out from the crowd

Much as we would love to think that all health brands and prescriptions drugs are unique and different, unfortunately they are not. It is hard to get noticed, to stand out and create a brand narrative or service that is both different and reflective of what customers want and need. The added complication is that we are also now more and more pressured for time, no-one can afford to do multiple rounds of research. So where can we obtain great insight in a fraction of the time?

Tech to supercharge ideation and insight

We decided at Day One to look at the problem differently, so we partnered with a company called Relative Insight whose technology uses the power of comparison to highlight differences in the way specific audiences, and various demographics talk. Using this tech, we explored the value of existing online data sources and through mass, AI powered language analysis, gained insight into the paediatric vaccination market.

Applying the approach to help address a real business challenge

Our objective was to help develop ideas for a communications campaign aimed at increasing paediatric vaccination in the UK. Over the years, pro vaccination campaigns have tried many different communication routes such as guilt, fear, factual debate and many more. But we wanted to look for a new message, one that might have broader appeal and help speak to parents in a more positive and relevant way.

AI to analyse hundreds of conversations between pro and anti-vaccinators

The language analysis was conducted with the objective of gaining rapid insight into current conversations between both pro and anti-vaccinators. We wanted to better understand what is being said, how the two different sides debate, the arguments they use, their tone of voice and underlying sentiment. We focussed our search on the key online forums where we know mothers actively debate this issue. We looked at current conversations but also how they had evolved over time to help identify shifts in the debate and how this was affecting attitudes and behaviours.

Detailed and relevant insights in a matter of days

A number of findings were clear from the research but the main discovery for us was that it was able to give us huge amounts of easily digestible data at speeds no human could ever match. This phase of the research took only 2 days to complete and provided numerous, fresh ideas that we then developed into idea 'Springboards'. These were then fed into testing and refinement via an online community. This approach took at least 3 or 4 weeks off the project timings and provided key nuggets of inspiration that would otherwise have been very hard to find.

Multiple use cases, huge potential

Developing positioning ideas is one use case but rapidly generating ideas for patient materials, better understanding issues such as adherence (or lack of it), understanding how patient attitudes are changing over time and analysing corporate communications are just some of the other ways this approach can be put to good use.

A drop in the ocean with plenty more to come

As we get to grips with the possibilities of what new tech can bring to our industry it is our mission at Day One to try and blend the old with the new, to superpower human intelligence with the benefits that new technology can bring. This is just a small example of what can be achieved from just a couple of days work, a mere drop in the ocean. What else we can do is beyond exciting and sure to change the face of research forever.

Hannah Mann at Day One

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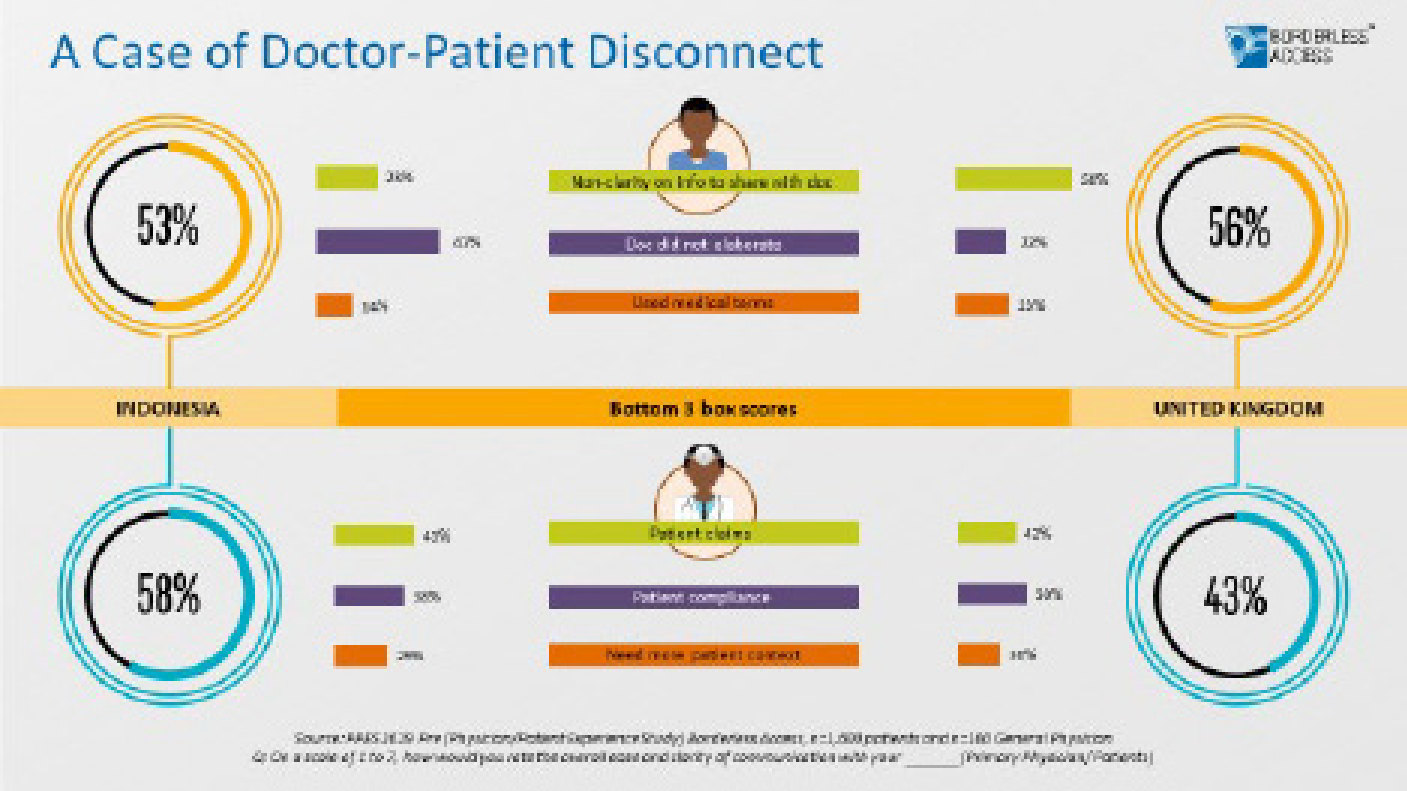
Can Digital Market Research be the Enabler of Patient-centricity?

Patient centricity is no longer just a buzzword. From patient-centric virtual clinical trial programs by Novartis to patient-focussed tech products and services, the approach to healthcare is changing. So, what role can market research play to make a positive contribution towards a patient-centric future and bring agility to pharma companies?



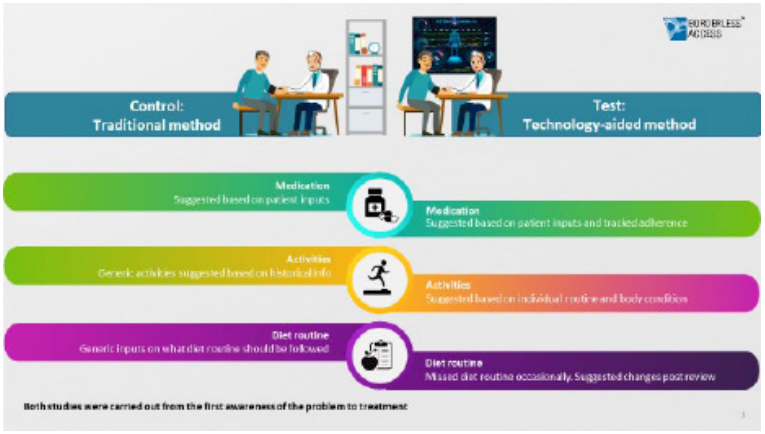
While the world is leaning towards patient centricity, we are still far from achieving a truly patient-centric healthcare system that's unhindered.

A recent (above) survey of patients and doctors across Indonesia and the UK by Borderless Access, a global digital market research company, affirmed some of these challenges, already believed to be sticking points by stakeholders in the healthcare sector.

The survey outcome establishes the existence of a doctor-patient disconnect. At the same time, it sheds light on the opportunities for market researchers to bridge the communication gap as well as improve information gathering, for the benefit of patients and pharma and biotech companies.

This thought lead Borderless Access to further the study, utilizing its digital healthcare market research capabilities, by mapping patient journeys using new-age research methods.

The goal was to analyze two parallel patient journeys – one (control group) utilizing data gathered from a conventional survey and the other (test group) with additional data from a "smart device" worn by the patients. The smart device would capture a wealth of information such as blood volume pressure, heart rate, skin temperature, and muscle tone, activities, and GPS data.

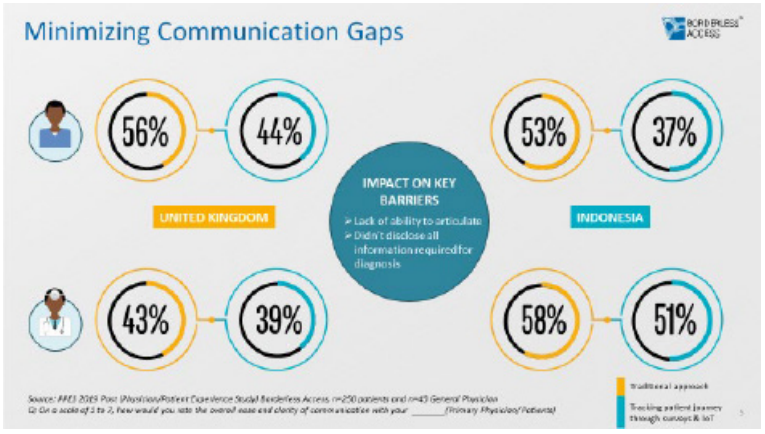


Control group: Patient inputs to the doctor were minimum, limited by doctor-patient disconnect observed earlier. The treatment process was dependent on data monitored by doctors based on conventional treatment practices such as medical tests, as well as patient inputs and available historical data.

The result was a conventional consultation where the treatment was significantly dependent on patient inputs.

Test group: The doctors had access to a rich set of data gathered from continuous monitoring of patients' health parameters by the smart device. This data also helped fill the information gap during patient-doctor interactions. Data was further validated using passive data monitoring for precision diagnostics and the course of treatment and medication was decided based on a comprehensive analysis of active and passive information.

In the test group, doctor recommendations were not limited to patient inputs since the smart device allowed active tracking of patient activity, routine, and even certain aspects of therapy adherence. This made the recommendations dynamic, more suited and continuous.



In conclusion, the forward-looking approach to patient-centricity represents a combination of methods. The existing quality and quantity of patient information collected via smart devices will methodically change future feedback. Tracking studies as a hybrid of technical and traditional surveys will become the new standard. Data technologies are increasingly being used and the collected data will in the future be validated and analysed in new depth by market research companies such as Borderless Access.

TENDER ANALYTICS (2): RELATIVE IMPORTANCE OF PRODUCT QUALITY VERSUS PRICE IN MEDICAL CAPITAL EQUIPMENT TENDERS

J. van de Sande[1], F. Shelley[1]

1 – SUAZIO Consulting, Antwerp, Belgium

INTRODUCTION

Medical Devices (and in particular Medical Capital Equipment) are important tender businesses. According to MEAT (Most Economically Attractive Tender) principles, a set of attributes are selected to evaluate the tender submission. Each attribute will have a pre-determined weight. In order to win the tender the manufacturer has to perform according to these weighted attributes. However, in a pre-tender assessment phase it can be challenging to understand the manufacturer's relative position versus other bidders and how differentiating the bid needs to be to won. In this research we will review the relative importance of Product Quality/Features versus Cost/Price.

METHODOLOGY

In order to give insight into overall important tender trends in Medical Capital Equipment, we have analyzed win/loss projects including 37 tender Post Decision Interviews in medical capital equipment, ranging from MRI to Ultrasound in various countries and hospital types. In our sample we included 28% tenders won, 72% tenders lost. In this meta analysis we grouped 15 numerical and coded questions across projects.

RESULTS

Delta for winning

In order to be better than the competitor there needs to be differentiation. We have measured the difference between ratings (0-10 scale) off the winning brand versus the runner-up brand. Our analysis indicates a higher difference for the winning brand in relation to Price (2,1) versus Product Quality (1,6) (Figure 1). This might indicate that Cost/Price is perceived more differentiating versus Product Quality.

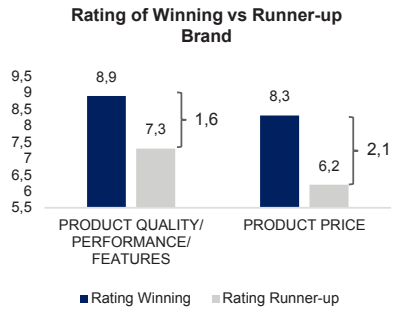


Figure 1. Difference in rating between winning versus runner-up brand on Product Quality and Price

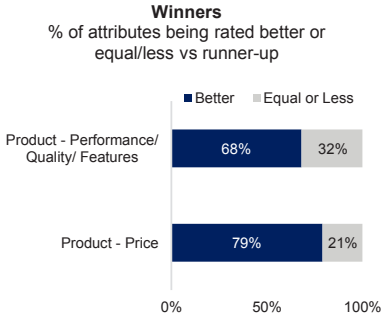


Figure 2. % of winning bid scoring better or equal/less on Product Quality and Price

Winners are not always the best in everything

When looking at the difference between winners versus runners-up it show that Product Quality of the winning brand rating is Equal or Less in 32% versus runner- ups. Additional, in 21% of the winning bids the Price was rated Equal or Less compared to the runner-up (Figure 2). Again indicating that price can be a more differentiating element in your tender submission.

Winners have a better correlation between Product Quality and Price

Interestingly there seems to be a correlation between the Product Quality rating and the Price rating. When looking at the winners we see a modest positive correlation (R^2=0,37) compared to no correlation for the runner-up (R^2=0,02) (Figure 3 & 4). These correlations would suggest that there needs to be a match between the offered Product Quality and the Price in order to win a tender.

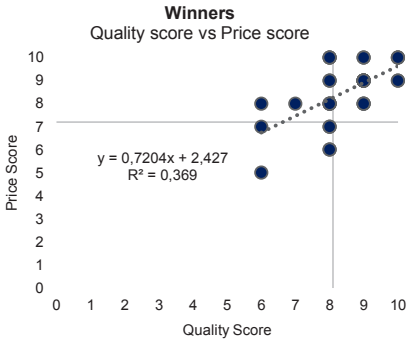


Figure 3. Correlation between Product Quality and Price Score for Winning bids

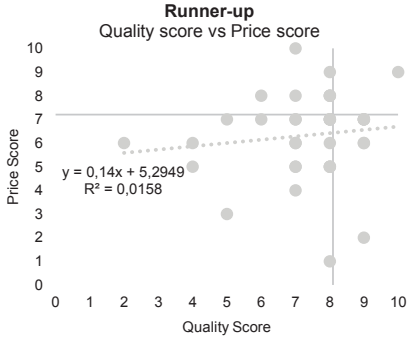


Figure 4. Correlation between Product Quality and Price Score for Winning bids and Runner-up Bids

CONCLUSIONS

Our tender analysis shows that winning tender submissions get rated higher on both Product Quality and Price attributes. However, we also see that winners do not always score higher on both attributes. Pricing seems to be more differentiation versus Product Quality. Data suggests the correlation between perception of Product Quality and Price can be an indicator for winning a tender. Winners have a moderate correlation. The Runner-up tends to not have a correlation, indicating that Product Quality and Price are not aligned.

Understanding the PCP Dilemma

Identifying the factors that determine specialist referrals

With over 250,000 PCPs in the US, many pharmaceutical marketers view Primary Care Physicians as a primary target, however they can be hard to reach given their sheer volume. In addition, marketers tasked with creating impactful messaging for more advanced treatments - often find themselves challenged with where to focus communications with PCPs. Should it be centered on direct patient care or specialist referrals? Healthcare insight specialists at BuzzBack have recently coined this the 'PCP Dilemma.' Realizing the burden this obstacle was placing upon their own clients, and wanting to support them in developing and prioritizing communications in this shifting landscape, they conducted their own study involving 200 PCPs across 3 therapeutic categories (including gout, asthma and major depressive disorder).

Setting the Stage

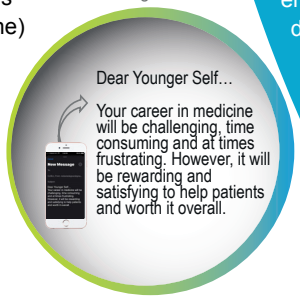
First, the team knew it was important to shed light on general PCP behavior. More specifically, to gain context around how PCPs feel about their roles, what motivates them to practice medicine, and even certain personality traits. Visual and creative, projective techniques (featured inset), elicited feelings, thoughts and emotions while traditional probes provided insight into current perceptions of their roles. Generally speaking, they express overall satisfaction and happiness, even with the challenges that infiltrate their day-to-day. These include: systemic institutional challenges (insurance hurdles, fear of medical malpractice), everyday challenges of patient issues (e.g., compliance), and struggles with time and resource constraints.

eCollage Example

Evaluating Characteristics to Predict Referral

To better understand how these factors impact the referral process, PCPs were classified into low rate referrals (those managing 70% or more of their patients alone) and high rate referrals. Comparing the 2 groups revealed relevant characteristics in predicting who would be LESS likely to refer out patients.

Email Advice to Younger Self



Primary Predictors

- specialize in family practice
- lower concern for malpractice risk
- exhaust all treatment options before referring
- office-based rather than hospital-based
- prescribing injections/infusions

Secondary Predictors

- more comfortable with risk and diagnostic uncertainty
- feeling less inhibited by insurance coverage issues
- believing they have time & resources to provide the best care

Key Takeaways

Further knowledge of PCP characteristics can help predict the likelihood for referral and better inform your marketing strategy. These 3 action items helped the team test and confirm that clarity in tough to reach target markets is possible.

1. Further segmenting your target
- Who you *should* and *should not* market to enables you to precisely target & prioritize.

2. Building awareness & educational campaigns for your products can aid in education
- In this instance, PCPs who refer less because they are unaware of all options.

3. Conducting influencer mapping and targeting
- Campaigns that target *who* PCPs listen to (conference presenters, journal authors, etc) may have a 'ripple effect' in furthering education.

We know that 'Patients are People,' but it's important to remember that PCPs are people, too. Human-centered, holistic techniques can provide insight into thoughts, emotions, perceptions, and day-to-day challenges allowing you to segment further and target your messaging more effectively.

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buzzback

A well-deserved promotion at Incite We would like to congratulate Lizzie Eckardt who has been promoted to Director. Lizzie has impressed clients and colleagues alike with her leadership, strategic thinking and consulting expertise across a range of business challenges. Well done Lizzie!

incite
KIN+CARTA

BazisHealth is tackling one of the biggest challenges of the pharma industry in 2020: Overcoming low patient compliance. Our research focuses on digital patient journeys in different medical cultures, and we are working on a framework to quickly assess compliance issues within a country based on automated virtual community analysis.

BazisHealth™

Borderless Access continues to strengthen its healthcare market research capabilities with new-age digital tools, AI-ML techniques, and its proprietary healthcare and niche panels. This was evidenced by the appointment of Max Czycholl as VP, Europe and a recent paper on improving patient centricity with the innovative use of digital market research.

BORDERLESS ACCESS™
Redefining Reach and Insights

FINE RESEARCH EXPANDS TO NEW TERRITORIES

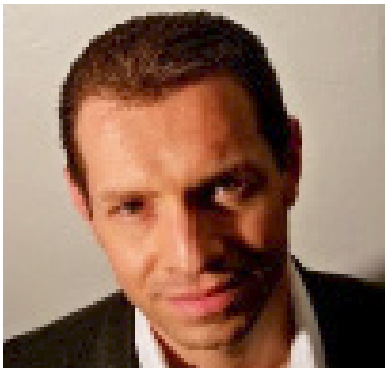
We have traditionally concentrated almost all of our healthcare LatAm projects in top 5 markets of Brazil, Mexico, Colombia, Argentina and Chile. The novelty this year is that we have been building panel capabilities in Peru, Ecuador, Uruguay, Costa Rica, Guatemala, Dominican Republic and Panama. We do hope we may be able to support your needs in these new markets soon!

fine
The LatAm Field Company

Dan Gallagher joins Day One

Day One is thrilled to announce that Dan Gallagher has recently joined the agency as an Account Director. Dan joins the team to help further drive Day One's rapid growth through the combination of human intelligence and cutting-edge technology.

Research Partnership has appointed ethnography expert Mandira Kar as Qualitative Research Director. Co-founding Director Mary Assimakopoulos commented, "We're pleased to welcome Mandira. Her specialist knowledge will be a great asset to our Qualitative Centre of Excellence, which aims to stay at the forefront of best practice and innovation."



QualWorld Expands Global Presence

QualWorld, specialized in qualitative healthcare data collection, expanded its physical presence to 12 additional countries globally, including Sweden, Poland and India.

CEO Cedric Degraeuwe comments: "This growth further diversifies our repertoire of solutions and facilitates the delivery of comprehensive insights when addressing our clients' continually evolving research needs."

https://www.qual -world.com/team -of-experts

KeyQuest Health is delighted that Bethan Williams and Bryan Capell have joined the outstanding qualitative team. Bryan is an experienced Project Director joining from Schlessinger group, brought in to manage both domestic and international studies. Bethan is an enthusiastic Graduate already learning best practise in delivering successful research projects.

Elma Research is delighted to announce the promotion of Ilaria Landino to Associate Director. Ilaria has made a fantastic contribution to Elma's quantitative business since she joined in June 2019. It is wonderful to see her grow as a researcher, as Elma grows as an agency."

The Economist INTELLIGENCE UNIT

Future of UK Life Sciences: how to reshape the industry for the 2020s

Brexit holds risks for the UK's life sciences industry, but it has already delivered one benefit: forcing policymakers to recognise the importance of the sector to the UK economy. In January 2017, when the then government launched its industrial strategy green paper, the life sciences sector was one of five UK industries to be named as a priority.

Almost three years later and with Brexit imminent, it is still clear that the UK's life sciences industry will need to carve out a new global role if it is to thrive. To clarify what that role would look like, in October 2019 The Economist Intelligence Unit convened a panel of senior people from the UK life sciences sector. The discussion aimed to identify the areas in which the UK could become - or remain - a global leader, and the regulations, policies, and investment needed for that to happen. The discussion highlighted several areas on which the UK should focus:

- building international trade links with and beyond the EU
- boosting the UK's reputation for research and development (R&D)
- developing innovative medicines, including cell and gene therapies
- building up the UK's role in developing clinical trials
- capitalising on progress already made in collecting joined-up health data across the National Health Service (NHS)
- expanding the international influence of thought-leading institutions such as the Medicines and Healthcare products Regulatory Agency (MHRA) and the National Institute for Health and Care Excellence (NICE) and
- developing healthcare innovations that build on the UK's strengths in other areas, including financial services, creative arts, and education

As the UK government updates its industrial strategy for life sciences, we assess how the industry could be reshaped for the 2020s. You can download the report here.