December 2019

E*ph*MRA
keeping members informed and involved

news
December 2019

Join us in Antwerp 23-25 June 2020

Innovation

Networking

Hot Topics

Contents

Copy Deadline

For the March 2020 News - deadline is 15 January

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generalmanager@ephmra.org
www.ephmra.org

Get in touch

If you have any enquiries, suggestions or feedback just email us:

Bernadette Rogers, General Manager
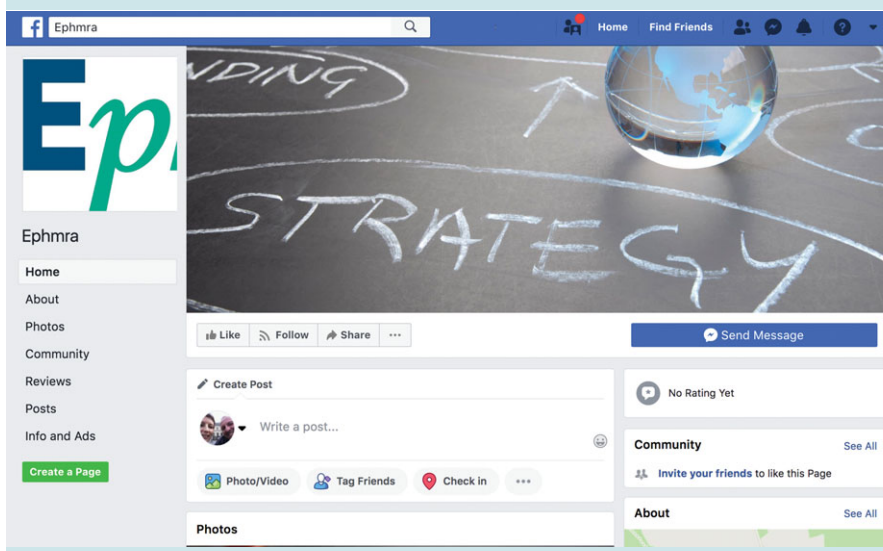Email: generalmanager@ephmra.org

Keep up to date

EphMRA communicates with members as regularly as practical:

- Send out emails
- Post on our LinkedIn page:
- Use Twitter – follow us:

NEW!
Facebook page – follow us on Facebook and get immediate notifications in your own FB feed

Just like our page – easy and simple.

Keep up to date with the latest news on our Antwerp conference
https://www.ephmraconference.org/

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
President

Thomas Hein
Thermo Fisher Scientific
Industry Member,
Past President

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Christophe Van der Linden
suAzio
Board Industry Member

Charles Tissier
EphMRA
Treasurer (non voting)

Bernadette Rogers
EphMRA
General Manager
(non voting)

With another highly successful annual conference now well and truly behind us, we are (as you'd expect!) busy planning our next conference in Antwerp, along with our other day meetings which we know are extremely popular and valued by our members.

In this newsletter, we are giving you a round up of what you can look forward to over the next 12 months, so you can put the dates in your diaries and make sure that you don't miss out on some outstanding meetings – a great opportunity to learn and network with your colleagues.

LONDON MEETING
Tuesday 25th February 2020

This meeting has become a regular feature of the EphMRA events calendar and is a great event to learn from excellent speakers and spend some quality time with colleagues from both industry and supplier companies.

We will be at a new venue for EphMRA next year:

The Hallam Conference Centre,
44 Hallam Street,
London W1W 6JJ

The venue is a short walk from Great Portland Street, Oxford Circus and Regent's Park tubes and Marylebone, Euston and King's Cross mainline stations are approximately 15 minutes by tube, so very convenient from wherever you are travelling from.

To ring the changes for 2019, we are actively looking for speakers outside of our industry, who can inspire and inform us about the innovation which is happening in other industries. Our goal is to engage speakers who are experts from consumer and B2B market research so that they can share real life case studies about the methodologies, technologies and approaches which have brought disruptive change and added value to markets and brands.

There will be plenty of opportunity to engage in discussion with speakers and colleagues, as well as to listen to the experts.

We hope that it will be an inspirational, motivating and immersive meeting so put the date in your diary. You can register on the EphMRA website.

We would like to thank our convenors who are working very hard to put together a programme which will mean that this meeting is not to be missed:

• Alex Marriott, Cello Health

• Gayle Hughes, Pfizer

• Anna Garofalo, Janssen EMEA Market Research Centre of Excellence

• John Grime, Strategic North

GERMANY MEETING
Tuesday 28th April 2020

The EphMRA meeting in Berlin has become a regular feature on the EphMRA calendar and next year is no exception! For the 9th year, we return to Berlin but next year we will be at a different venue:

Park Inn by Radisson Berlin Alexanderplatz, Alexanderplatz 7, Berlin 10178

This venue is more centrally located in Berlin and will make it easier for travel, as the main train station is close by and it's easier to get to from Tegel airport.

Please note that the meeting is held in German, with no translation and all the presentations will be delivered in German

The convenors are working hard to put together a programme which will engage members from both industry and supplier companies and we have invited submissions on 'making sense' in its broadest meaning.

Our convening group in Germany work hard to create a programme that will resonate with attendees at the meeting, so we'd like thank them for all their hard work:

• Yvonne Engler, Bayer Pharma AG

• Johanna Glaser, Point Blank Research

• Katja Birke, Produkt+Markt

• Janine Ruhl, Sanofi

SWITZERLAND MEETING
Tuesday 29th September 2020

Following a highly successful meeting in Basel in September, EphMRA will again return to Basel to the Hyperion Hotel next September.

We had a highly engaging meeting this year, with some outstanding sessions on AI and Digital Analytics presented to members. The meeting culminated in a 'World Café' discussion session where attendees were able to discuss in small groups the implications of all the ideas presented and have conversations with all the speakers.

More information about the 2020 meeting in Basel will be published on the EphMRA website in due course, but please put the date in your diary so that you can enjoy a day of high quality presentations and networking.

We would like to thank the convenors for their hard work in preparing for the 2019 meeting:

• Letizia Leprini, Bayer Pharmaceuticals

• Sandra Hacke, Bristol-Myers Squibb

• Angela Duffy, Research Partnership

• Fenna Gloggner

SWITZERLAND MEETING REPORT
24 September 2019

EphMRA Switzerland One Day Meeting 2019
Highlights and Insights

IN THIS REPORT

The third meeting of the Swiss chapter of EphMRA focused on Artificial Intelligence (AI) and its increasing role in adding value to pharmaceutical market research. Delegates were also given an update on GDPR and the research code that is in development.

At the start of the meeting, all attendees were asked to indicate their level of experience with AI. Interestingly, over 67% had some experience with AI, whilst 20% had no experience with AI and 13% had extensive experience.

Convenors:

Letizia Leprini,
Bayer Pharmaceutical Division

Sandra Hacke,
Bristol-Myers Squibb

Angela Duffy,
Research Partnership

Fenna Gloggner

The views expressed by those quoted in this report do not necessarily represent the views of EphMRA.

Speaker: Sarah Phillips and Romain Lasry, IQVIA

THE PERFECT STORM

Why Business Intelligence is (almost) ready for Artificial Intelligence

Sarah Phillips and Romain Lasry of IQVIA gave a broad overview of not only what AI is, but also what it stands for, application areas and why we should all embrace it as part of our daily work.

What is AI and where we are today

AI is a set of techniques that allows a computer to perform tasks that we thought were only previously within the realm of humans. These include applications such as being able to hear, see, learn and solve problems i.e. mimicking human comprehension and behaviour.

We are at the beginning of rapid change with AI in healthcare and it is on the trajectory for exponential growth, from $2 billion in 2018 to $36 billion by 2025. It is an area where we are going to see a lot of growth very quickly but in the realm of commercial pharma, the adoption of AI is currently low and it is not implanted yet.

How AI can provide opportunities in pharma

AI offers a number of opportunities in pharma including better and faster diagnoses. It currently takes 4.8 years to diagnose a rare disease from onset symptoms and 40% of first diagnoses are wrong. AI can help to reduce both of these outcomes.

AI can also enable faster clinical development. 86% of clinical trials are delayed in some way, many through patient recruitment, which AI can help to speed up. It can also enable more impactful engagement with physicians and patients, as well as more efficient process automation.

Three factors need to be in place for AI to work successfully:

- Data which is big enough for algorithms to learn from. Substantial data sets are therefore needed.

- Technology for the faster processing of data.

- New methods and algorithms which can reveal complex patterns in data.

Using AI to improve the marketability of your research

AI can be used to improve the quality of your research in ways including:

- More actionable segmentation. You can link attitudinal data and behavioural data from the real world to market research data and train your algorithm to look at both data sets. The algorithm can understand the patterns that exist in both data sets and figure out how you extract your segmentation and run it on your population.

- Improving identification of patients. By using a rich data set including patients who have been diagnosed, an algorithm can figure out patterns that exist and give you an algorithm for finding undiagnosed patients.

- Improving commercial precision and targeting more precisely.

- Delivering relevant content. By looking at how frequently a doctor has been contacted and what their preferences are, the algorithm can plot a pathway which can improve the way you deliver the content of your messages.

Key takeaways:

- AI can be used for many different things and has the potential to be transformative - we are at the beginning of the transformation.

- AI is going to have a profound effect on business intelligence. It will improve how we do things operationally. It can also recognise patterns in data, predict outcomes and recommend suggestions. However, you have to be able to clearly articulate the question, know what you are looking for and be able to ask a question in a few seconds.

- You also need to have enough quality data, otherwise the predictive value is not worth having. In market research, we often have low data volumes so the application of AI is more appropriate for big tracking studies.

- You have to be able to trust your data more than ever before.

- AI will replace a number of tasks including coding, data capture and the profiling of respondents.

- Unprecedented technological change means it will be difficult for businesses to keep up and this is where people come in. People are the link between technological change and businesses.

- While manual tasks will be taken away by AI, it is unable to offer the broad skills that humans have. This means that while there will be job losses in the future, there will also be jobs to be gained.

Speaker: Yannick Loonus, Semalytix

BEYOND THE HARD FACTS:

Four hypotheses on how Artificial Intelligence will change traditional Market Research

Yannick Loonus of Semalytix gave delegates four hypotheses of what may happen in the mid to long term in terms of the impact of AI on market research.

What is driving opportunities for AI?

Three major influences have created an opportunity for AI in terms of real world evidence:

- Real world data needs have increased.

- We have evolved from text mining to text reading and can derive the context from what was said, allowing us to make more precise judgments.

- Large-scale computing is now more accessible, faster to use and cheaper to obtain.

While the long-term vision is to be able to consolidate on a single platform where people can interact with each other, collaborate, share and measure how well they are doing, the four hypotheses presented were more intermediate in terms of their scope.

The four hypotheses

1. AI will allow us to be much more creative when it comes to solution approaches. Specific methodology is used because we know it is going to work but when everybody does this, it is difficult to get a competitive advantage. If we allow ourselves to be more creative, there could be a competitive advantage. There is a certain skill in translating the available data to solution approaches.

2. Researching the 'what and why' will be done from one source in the future. This will enable you to drill down into individual topics and if you want to go into detail, you can read only the things you are interested in.

3. Adding value. One way to add value is by uncovering unknown unknowns. They are different stages of how well we know things. Most unknown unknowns exist because of the current logic of market research. Discovering unknown unknowns requires exploring problems with an open mind and doing this can elevate the market researcher to a more strategic role within an organisation.

4. Achieving a new era of collaboration through breaking down data silos, tracking activity, commenting on data points and having an incentive for interacting with the data.

Key takeaways:

- Opportunities for AI in market research are increasing due to the increase in real world data needs, the shift from text mining to text reading and the development of large scale computing.

- While the long-term vision is to be able to collaborate on a single platform, in the shorter term, AI will allow us to be more creative and add value in different ways, including uncovering unknown unknowns.

Speaker: Lee Gazey and Ben Lorkin, Hall & Partners

ALL THAT GLITTERS IS NOT GOLD

A practical guide to making AI work for you

In their presentation, Lee Gazey and Ben Lorkin of Hall & Partners shared their experience in looking at practical applications of AI in qual and quant settings to create business impact for clients.

AI - the viewpoint right now

While AI is undoubtedly one of the most divisive topics currently, our speakers suggest that agencies who embrace it will be able to succeed in the future. They purport that the market research industry has been stagnating, but we are now at a moment where new technology is taking over, largely because it is more affordable. Clients can now ask for faster, cheaper and better because of embracing technology and AI and therefore the old way of doing things will change.

What Hall & Partners is doing with AI

Hall & Partners has used AI for two years, achieving greater efficiency and the faster elicitation of insights that were previously inaccessible. Significant learnings include:

- Any answer is stronger if you look at it from multiple directions.

- There is a move from talking about qual and quant to talking about collecting data (primary research), predicting and diving. Connecting data is how we add context to the data and realism. Diving is the ability to go back into data to look for answers you were not looking for before.

- AI can add a lot and has added a lot but only in partnership with humans. On its own, AI can get it wrong, for example, with transcriptions. Human intervention is needed.

AI can be used to ask how we ask the right question in the right way to get the right data. Experimenting with tools will enable you to maximise what you get back, but it is important to remember that tools require a lot of human intervention to define sources. Some tools work with a broad range of specific sources. You have to train the tools, nudge them and reframe the question, as well as know their limits. Once you have done it once, the tool has learnt how to do it for the next time. The more you use tools, the better they become but they do not do it on their own and require a lot of intervention. They also tend to group things into negative and positive.

Key takeaways:

- A platform is just a platform. Humans need to interpret results to understand opportunities.

- You need to train and nudge the AI. It learns from these experiences.

- Prepare, plan and know your sources. AI needs to be directed and if you plan and refine your questions, the better the outputs.

- Keep training the tools. The more you use them, the better they become.

Speaker: Ratna Wynn and Rachel Medcalf, Adelphi Research

CAN AI REALLY ADD VALUE IN PMR?

Learnings from real life cases

Ratna Wynn and Rachel Medcalf of Adelphi Research outlined two real life examples of how AI has added value in Primary Market Research (PMR).

Case study 1

A chatbot was used to seek out what information a physician needed to make certain decisions. The chatbot identified what information went back to the doctor before asking follow-up questions and seeing what the doctor answered. Through a series of questions, it was possible to see what the doctor was prioritising and delivering information in this way made the experience much more holistic and engaging for the doctor.

The chatbot's goal was to find out what is important when somebody is prescribing and the order in which information is obtained from the patient. The chatbot took sentences and questions to a numerical value which was run over an algorithm that is worked over different

levels. It looked for key words to pull out and then looked at individual letters so that it could cope with misspells. It then converted to a numerical format to obtain a response.

The benefit of this approach was that information that the doctor needed to know could be presented in a more logical fashion, enabling the information to be prioritised and a pathway to be created, focusing on the first and which symptoms are most informed.

Learnings included:

- Deciding what information to feed the chatbot with was critical.

- Key scenarios were built in which might influence the doctor, as well as probes for when the chatbot did not understand.

- Initial versions of the chatbot were not good and needed training time.

- Integration with a survey also took time and it was found that more patient profiles will help the chatbot.

Case study 2

Using a global tracker involving 10 markets and 17 attributes across multiple brands, AI was used to look at how many scores could be easily predicted.

Four attributes were able to be predicted from the total of 17. The same technique could be broadened to apply to attitudes or brands and there is the potential ability to focus only on questions that matter but cannot be predicted.

Learnings included:

● Some kind of anchoring technique was needed.

● You should exercise caution when markets change substantially.

Key takeaways:

● AI helps us to understand behaviour and look more intricately in terms of decision-making.

● It doesn't capture tone yet.

● It takes time to train and this will need to be built in.

● The human element is key in terms of design and interpretation.

● We need to keep testing before launching to learn about glitches as well as positives.
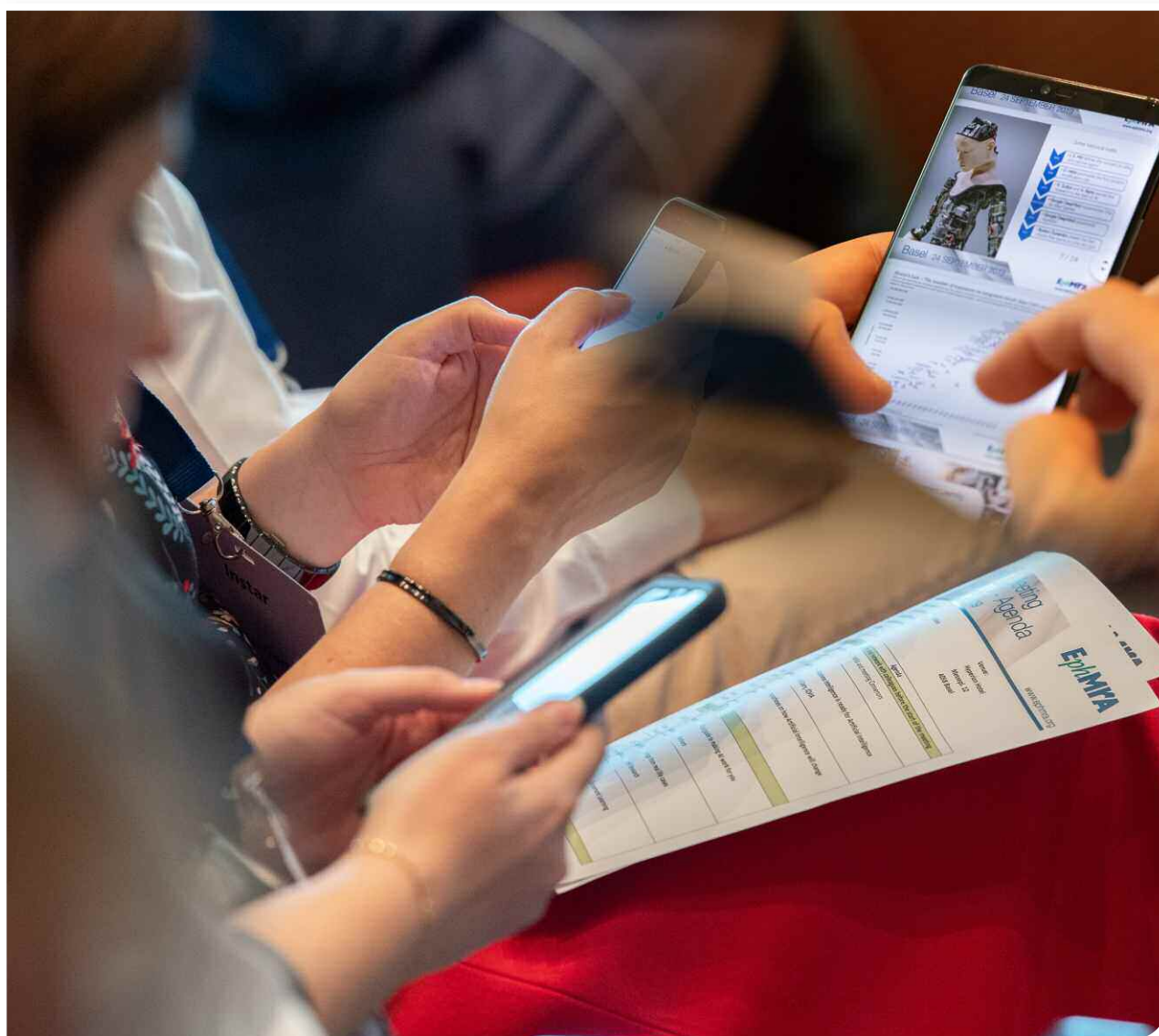
Speaker: Giuseppe Bonaccorso, Bayer Pharmaceuticals

CUSTOMER JOURNEY OPTIMISATION THROUGH REINFORCEMENT LEARNING

In his presentation, Giuseppe Bonaccorso explained how Reinforcement Learning, based on the active transformation of imprecise feedback into actions that are aimed at maximising a goal, can assist with customer journey optimisation.

Applying Reinforcement Learning to the customer journey

Segmentation uses the same journey and while the number of journeys can be context dependent, it is limited. Segments also change over time and evolve.

These issues can be addressed through using:

- Real-time CRM recommendations.

- Feedback evaluation which is carried out by inserting a feedback loop after each action. This creates a very strong data processing pipeline. For example, on web pages, it is possible to see where the interest is

focused and in webinars, real-time feedback evaluation is obtained through participants submitting questions. This creates interest that can be used in next steps. Feedback can also be visualised.

- Tailored customer journeys achieved through tailored recommendations with few segments. Reinforcement Learning can significantly increase the average 'full' responsiveness from 5-15% to 85-95%.

Key takeaways:

- Using Reinforcement Learning can transform imprecise feedback into actions and goals.

- Use different templates to process in real time all the information from channels that are connected.

- The goal is to capture a larger population and it is therefore necessary to find optimal actions to do this.

UPDATE ON WHAT IS THE LATEST IN ETHICS

Camilla Ravazzolo gave an overview of the GDPR research code which is under development, before taking a look at some of the grey areas around GDPR that are currently being highlighted and finally focusing on how AI, market research and ethics interact.

GDPR research code

All associations are eligible subscribers to the ERDAA (The European Research and Data Analytics Alliance) research code which will specify the requirements of the GDPR for the sector. The code is currently at the interpretation stage and will reflect the guidance and case law that is developing. It will put research participants at its core by framing the four fundamental research principles:.

- Duty of care
- Duty to protect
- Duty of stewardship
- Duty of accountability

It will also focus on the roles and responsibilities of the joint controller, controller and processor. This is a matter of reasoning as to who determines the purposes and means of the research i.e. evaluating each research project and the level of control in determining the purposes and means of processing. The GDPR asks for sound reasoning as to who is the controller, processor etc. .

Grey areas

Current grey areas in GDPR include:

- The choice of the appropriate legal basis for processing. You should choose a legal basis, record your choosing and inform your data subjects.

- The use of legitimate interest in market research. While this varies in different countries, you cannot use legitimate interest when you are dealing with non-anonymised data.

- Anonymisation and the likelihood of data subjects being identified. You should always use privacy by design and privacy by default principles. This will help you to start changing the narrative.

AI, market research and ethics

With AI, guidelines need to ensure transparency, non-discrimination, fairness and accountability. While AI will bring many advantages for healthcare research, ethics will be critical, including issues around transparency, anonymisation and consent.

Key takeaways:

- Evaluating the level of control in determining the purposes and means of data processing will help to determine who is the controller, joint controller and processor on a research project.

- Current grey areas in GDPR include data anonymisation, which in practice means the likelihood of re-identification.

- Ethics will be a critically important area for AI in healthcare research in the future.

Speaker: Abigail Stuart and Hannah Mann, Day One

VOICE, THE NEXT FRONTIER

In the final presentation of the day, Abigail Stuart and Hannah Mann of Day One gave an insight into the potential of using voice AI and voice assistance in the context of market research in the future. While we are currently at the apex of our addiction to text and typing as a primary mode of communication, this is set to change as voice technology continues to expand.

Current trends

The uptake of voice devices continues to grow rapidly. In 2016, Amazon sold 5m voice devices but by 2023, this is forecast to be 500m. Voice is being adopted by consumers more rapidly than any other technology and is changing how we search. Voice technology will be integrated in every single object and voice dialogue advertising, in which we have a conversation with a brand, will become commonplace.

Voice AI will become more emotionally intelligent. Retail outlets already use voice recognition to tailor the retail experience and some cars can detect blink rates, yawning and stress. Voice recognition is also being used to pick up early signs of stress and depression.

Voice in Market Research

The potential of using voice in market research highlights a number of interesting questions:

- Do people say more than they text?
- Will it be easier to give answers through voice?
- Will we get richer responses?
- Can we collect more qual data?
- Will emotion AI help us be more predictive?

Day One conducted a web-based survey using a combination of a traditional text-based survey and voice, in which a machine gave the audio questions and the answers were spoken. A mixture of open and closed questions was used, together with voice emotion analysis AI, voice print identification, a speech detector transcription and an emotion detector.

The participants were very positive about the audio survey and the findings showed that more information was given with voice, although the difference was not huge. The use of audio did not affect responses or alter results, although when the audio responses were run though voice technology, a clear disconnect was found between what

people said and what their voices were actually saying. Stated responses can therefore be different to what is conveyed through voice.

What next for voice technology and market research?

Although voice technology is currently limited to instructing, the next stage will involve emotion detection, enabling us to interact and empathise. The potential is therefore to combine the what and the why i.e. qual richness with quant rigour.

Emotion detection delivers value when people have a vested interest in not telling the truth. The combination of humans plus machines will improve what can be delivered through market research in the future.

With AI, guidelines need to ensure transparency, non-discrimination, fairness and accountability. While AI will bring many advantages for healthcare research, ethics will be critical, including issues around transparency, anonymisation and consent.

Key takeaways:

- The adoption of voice AI is set to increase rapidly, including its use in market research. It will also become more emotionally intelligent.

- More information can be given when voice is used in market research, particularly when there is a disconnect between what people say and what their voices are conveying.

- Voice will potentially enable us to combine the what and the why in market research.

ANNUAL CONFERENCE ANTWERP
23 - 25 June 2020

The conference will take place next year in the beautiful city of Antwerp in Belgium. We'll be based at the inspirational Flanders Meeting and Convention Center, also known as 'A Room with A Zoo'. Want to know more? Please read our blog on the conference website - https://www.ephmraconference.org/blog/posts/2019/september/antwerp-2020-a-unique-experience/

The conference planning is in full swing, with the Programme Committee working hard to review the many submissions which were received from potential speakers. Thank you to everyone who sent in their submissions. We really value the time and effort everyone goes to to make these submissions, as they take a lot of time to produce.

Registrations will be open from Monday 20th January, so this is when you get the best prices, as the Early Bird fees will apply from this date until Tuesday 10th March, so make a note of these dates so you don't lose out on the lower prices.

The programme will be available on the conference website from the date of registration and we are excited to share some outstanding speakers with you all. You won't be disappointed with what the great programme of speakers and events on offer next year in Antwerp!

New for 2020! Following feedback from delegates, the conference will open at 2pm on Tuesday 23 June and will close mid afternoon on Thursday 25 June. There will be no workshops at the conference, as LDC training will now be offered separate to the conference in order to allow for a wider range of training opportunities that members have requested.

3 Great Reasons to Attend EphMRA 2020 Conference (as told by Delegates)

Insights and Highlights

Preparations are well underway now for the EphMRA Annual Conference in Antwerp from

23 – 25 June 2020.

The team has been reviewing delegate feedback from this year's event and, never wanting to pass up the opportunity for a little qualitative research, we identified three key themes and clusters of words that kept popping up.

No. 1 Reason to Attend -
Highly Relevant and Inspirational Content

Selecting speakers for the EphMRA Conference is a monumental task – as anyone on our Programme Committee can tell you!

We take the responsibility of putting together an impactful programme for you with a balanced mix of topics very seriously. So, when we reviewed the feedback from delegates and saw that the speakers this year were rated the highest for many a year, we were delighted!

"Content was one of the best – inspirational, motivational – mainly due to presentations based on case studies."

- Agency Delegate

No. 2 Reason to Attend - Great Networking Opportunities

Your comments told us that one of the most important reasons to attend our Annual Conference is to network with like-minded people who are leading the way in our industry.

We're pleased that delegates view our Conference as the event to catch up with colleagues and make new connections.

"Still the best industry event to catch up with old friends and make new contacts!"

- Xierong Liu – Director, Ipsos Healthcare

No. 3 Reason to Attend - Knowledge Sharing

Delegate feedback told us that the EphMRA Conference is an ideal environment for sharing knowledge, including:

• Success stories

• Innovation

• Experiences.

This knowledge sharing doesn't just take place in the presentation sessions (plenaries, parallels, Agency Sessions and discussions), it is happening all the time. It's those debates you have after a great presentation, the discussions that take place over dinner and the overall buzz of innovation that is felt in the air.

"I love coming to the yearly EphMRA Conference. Such a great opportunity to network, share experiences and to learn from each other on subjects that are key to our industry both now and in the future."

– Carolyn Chamberlain - Director, Purdie Pascoe

Next stop, Antwerp

It has been wonderful for us reading through your evaluations from this year's Conference and thinking about how to make the 2020 event even better.

The key themes of outstanding content, valuable networking opportunities and knowledge sharing helped focus our planning and the selection of our venue (A Room with A Zoo).

We hope to see you in Antwerp next June!

P.S. Here is just a taste of that feedback from colleagues across the world – and don't forget to put the Conference dates in your schedule now!

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
Managing Director UK
Elma Research

Erik Holzinger
Founder & Director
groupH

Roy Rogers
Partner
Hall & Partners

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

Carolyn Chamberlain
Director
Purdie Pascoe

Amr Khalil
Managing Director
Ripple International

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.

The EphMRA Forecasting Forum, which saw its first light-of-day only in 2018, moved from its regular online platform for the first time to brick-and-mortar for a half-day face-to-face meeting hosted by Boehringer Ingelheim and groupH on 11 th October. The event brought together 15 senior forecasting individuals from different industry, agency and academia settings. The 'register-no-fee-organise-your-own-travel' type of event allowed for both cross-industry-networking with peers and very specific, forecasting focused, topical discussions outside of day-to-day departmental silos and day-to-day project work.

Keynote speaker Prof. Paul Goodwin from Bath University and known for his publications 'Decision Analysis for Management Judgement' and 'Forewarned - A Sceptics Guide to Prediction', among others, kicked off with his thoughts on 'Management Judgement in Forecasting'.

The first talk covered the 'superior' forecasting abilities of rats vs. human in short-term forecasting and the surprising willingness of senior management to believe more in anecdotes rather than data. Prof. Goodwin then highlighted behavioural science issues impacting long term forecasting such as anchoring / recency bias / base-rate examples and conformity and described options available to minimise these biases: Delphi methods or prediction market methods allowing to put your 'skin in the game'; plus bottom-up decomposition modelling and the use of analogues.

The lively post-talk discussion brought up interesting statements:

'There is a difference between first forecast & management input to support the business case, especially relevant for new products. Forecasts become 'contaminated', can management judgement be put into a forecast as a specific line?'

'There is the strong belief that complex models will increase accuracy. Can we prove a simple model is more accurate than a complex one?'

'Don't confuse pure forecasting, with the number that senior management wants to hear – 'that is not forecasting'

The talk concluded that management judgment can be valid if based on plenty of practice and experience but is not the same as a forecast and therefore not a substitute but complementary.

Will people believe more in algorithms than judgment as more data becomes available? - 'No change has been observed so far – judgment still remains important.'

The second talk went deep into the topic of behavioural science in Primary Research. After the description of general issues related to asking survey questions to improve the value of responses, Prof. Goodwin advised against factoring e.g. the future value of marketing activities versus competitor responses into survey questions. He advised to create the context of market reality at launch and then adjust for internal and external biases. The Juster-Scale allows to make more differentiated adjustments based on probabilities expressed in words. Different Marketing Mix and Competitor Scenarios may be assessed by randomly assigning physicians to different groups.

'*Few people go back to look at long-term forecasts. People believe long-term forecasts are wrong, despite evidence to the contrary*' was one quote from a participant during this forum.

To address this question, among others, Erik Holzinger presented the latest outline of the EphMRA Forecasting META Analysis Project proposal involving industry, agency and academia looking back at historic forecasts and how they turned out in real-life. The audience gave feedback on its primary and secondary objectives and the importance to keep criteria as light as possible to achieve buy-in from the industry. NICE was mentioned as a potential partner to help with 5-year pre-launch forecasts data to compare with reality.

The EphMRA Forecasting Forum continues online with its monthly dial-ins on selected topics.

• **15th November** : How to present and communicate to management?

• **6th December** : Epidemiology and market data alternative sources.

• **2020 monthly dial-in topics to be confirmed**

• **2020 EphMRA Annual Conference** , Antwerp, Forecasting Roundtable, **24th June** : Demand Forecasting and China: Forecasting.

For joining the Forecasting Forum, please contact Bernadette Rogers, generalmanager@ephmra.org

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.

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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

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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 HRW segmentation process: Art supported by science

I was recently reading about the behavioural bias known as the false consensus effect, which leads us to overestimate the extent to which other people think like us. There are a variety of studies which prove this to be true, but it got me thinking about the reasons why we overestimate the similarity between ourselves and others. In simple terms, I believe this is because we tend to surround ourselves with likeminded people.

This presents us with the truth that whilst many people don't think like us, others do have similar attitudes and beliefs: and often these are aligned across several different topic areas. For the marketing community therefore, it's important to understand how your market divides down into groups of 'likeminded' people with particular attitudes and beliefs that will likely impact upon the perceived desirability of your brand.

Segmentation is a key marketing tool used to ensure that marketing campaigns are designed with a defined and well-understood target group of customers in mind. Firstly, identifying which customers to target, and secondly, building communications which resonate with the attitudes and beliefs of those people you wish to target.

But there's a problem. And this problem is particularly evident in the pharmaceutical sector where mass marketing campaigns are neither feasible nor desirable. The problem is that the two key objectives of a market segmentation (targeting and communicating), whilst complementary to one another, are also at odds with each other.

Let me explain: in order to adequately target customers, pharmaceutical companies tend to rely on more functional aspects such as the size of the hospital, job role and past prescribing behaviour. This is because it's hard to identify customers in any other way. Marketing activities are much more targeted in the pharma world. Representative calls are an important way in which we can expose healthcare professionals to both new and existing products, but with shrinking sales forces, it's simply not possible to speak to everyone, and so you need to drill down to those people who you can practically identify and contact.

However, as we've established, the strength of segmentation is in identifying 'likeminded' groups of customers who are more likely to be open to your product and for whom messages can be tailored so they leverage existing attitudes and beliefs. Segmentation in the pharma industry therefore needs to strike a balance between segmenting based on attitudes and segmenting based on logistical feasibility.

What is the answer to the "segmentation problem"?

At HRW, we employ a more fluid approach to segmentation and see the process as an art supported by science. We do generally favour an approach whereby we segment on the basis of attitudes, but we also seek to understand how our clients are practically going to implement the segmentation.

Fundamentally, we know that attitudes inform behaviours, and we are cognisant of the fact that your target audience may already be defined. Understanding this and then identifying which (attitudinal) segments exist within your audience is essential. This way, tailored discussions can take place with different subsets of your overall customer target.

The practical issues of identifying subsegments within your overall target group presents a further challenge, but one which can effectively be overcome if your sales teams are equipped with an understanding of which customer segments exist. Bringing your segmentation to life and letting it live within your company will empower all functions to seamlessly develop materials and ways of communicating that can be adjusted to meet the needs of those core attitudinal segments.

We know that when it comes to segmentation, there is so much more that can be delivered beyond a traditional PowerPoint deck itself. We are always challenging ourselves to prepare deliverables that are easily used, understood and acted upon – but also those that have impact, resonate and bring segments to life, so that they are remembered and more easily embedded into a company. In a recent segmentation study, we sought to ensure exactly this. There were a couple of critical factors to achieving our goal:

1) Thinking about how we **shared and implemented** the findings

Collaboration with our client was key. We utilised several workshops to ensure that the segmentation was meeting their needs every step of the way. This included an early solutions workshop where we talked through different analysis options and agreed which model would be most actionable and sensible for the team. We then facilitated a final implementation workshop where we presented key data posters around the room, discussed strategy and tactics for communication, as well as brainstorming how to personify and name the segments – immersing everyone in the segmentation and embedding the results.

2) Thinking about the **outputs** that we provided our client

Alongside the key data results, we created a short but powerful **video animation** to introduce the segments one by one – sharing the key essence of the segment in a simple yet effective way. We also created stimulating **infographics** for each segment which enabled us to share key data and visuals in a digestible 'takeaway' format. These deliverables had maximum impact in showcasing who the segments were in a memorable way.

Utilising your deliverables, all that is needed is equipping your team with a few key questions that can be unobtrusively added to a discussion, to identify which approach is likely to resonate most.

Equally, it is easier to identify those who are unlikely to be convinced about your product offering and so less time and effort can be spent in these engagements.

Indeed, even having an understanding that 'not everyone thinks alike' is a helpful step in understanding that market communications need to be tailored for different audiences.

Attitudinal segmentation is a powerful way to support your communication and targeting strategy to ensure that your brand is a success.

By Nicola Vyas, Research Director
info@hrwhealthcare.com
+44 (0) 1491 822515

Update on Ethics Webinar

Speakers

Debrah Harding
EFAMRO - Vice President

Camilla Ravazzolo
EFAMRO - Head of Policy and Standards

27 November: AI/Machine Learning/ Digital - use, implications and ethics for market researchers/data analysts

This webinar offered members an update on the latest developments we need to be aware of"

• Overview and definitions

• Current use and developments in MR/data analytics

• Ethics: key considerations for healthcare MR and data analytics

• Summary

• Q&A

To register for this event visit https://www.ephmra.org/ events-training/webinars/27-november-ethics-update-webinar/

Hall & Partners are delighted to be shortlisted for innovation for the third consecutive year in the 2018 MRS Awards, reflecting our continued drive for deeper insight through novel approaches.

HRW's award-winning internal team of behavioural scientists (HRW Shift) expand to nine members adding experienced Research Manager-level Behavioural Scientist Rhiannon Phillips.

(UCL MSc Social Cognition) and Cambridge MPhil History and Philosophy of Science and Medicine graduate Emma Neville as Behavioural Science Analyst.

Purdie Pascoe, a high-end specialist qualitative and quantitative healthcare insight agency has refreshed its company brand. The brand refresh represents the evolution and growth of the agency over the past 12 years. The new brand strapline 'Agile thinking. Strategic clarity' and refreshed brand identity represent Purdie Pascoe's global consultative approach across both Pharma and Device space, underpinned by senior level expertise and commercial knowledge.

EphMRA London Meeting – 25 February 2020

The meeting is convened by:
Alex Marriott, Cello Health
Gayle Hughes, Pfizer
Anna Garofalo, Janssen EMEA Market Research
Centre of Excellence
John Grime, Strategic North

Location:
The Hallam Conference Centre
44 Hallam Street
London
W1W 6JJ
T: +44 (0)20 7706 7700

Germany 2020 Event Berlin 28 April

https://www.ephmra.org/events-training/events/germany-2020-event-berlin/

For the 9th year, we return to Berlin for our highly popular local event and the meeting will take place on Tuesday 28th April. Please put the date in your calendar!

As always, the meeting will comprise of a mix of papers and discussions and will be

held in German, with no translation available for attendees.

In 2020 the venue will be more centrally located in Berlin, which will make it easier for colleagues to travel to the venue from the main train station and from the airport.

The meeting will be convened by:

Yvonne Engler, Bayer Pharma AG

Johanna Glaser, Point Blank Research

Katja Birke, Produkt +Markt

Janine Ruhl, Sanofi

Location:
Radisson Berlin, Alexanderplatz 7, Berlin10178, Germany
T: +49 (30) 23890