



The 2025 EPHMRA Conference

Take a look at the top line
summaries of each paper
presented at our
2025 June conference.

www.ephmra.org



It was an outstanding event – not only do we think so but take a look at some of the feedback!

“ *This EPHMRA conference was one of the better conferences I've been to, with really high calibre papers and presenters on some of the most important and future-facing topics for our jobs and our industry! Can't miss it!”*

“ *A thought-provoking event, with papers ranging from the deeply personal through to impact of AI on our industry. Great attendance from across pharma companies and agencies. Well worth attending.”*

“ *What an event, a lot of positive energy this year, a thirst for learning and sharing of experience was evident in the engaging conversations.”*

“ *My first time at the EPHMRA conference — and definitely not the last! As a freelance consultant, it's so important to stay current, and this event was a great mix of fresh thinking, new twists on traditional methods, and plenty of inspiration. Best of all, I got to connect with so many like-minded people across the industry.”*

Verena Schiessl, VS Consulting

“ *This event is a real opportunity for all those involved in market research to get together. The conferences are of a very high quality, allowing us to ask questions about the way we operate and to see how our organizations can evolve.”*





“The conference proved to be a valuable experience, characterized by insightful presentations that sparked new ideas and fostered meaningful connections. The atmosphere was both serious and friendly, allowing for productive discussions and the opportunity to reconnect with colleagues and peers. Overall, it was an enriching event that encouraged collaboration and innovation.”

Anne-Beatrice Clidassou MSD

“I’ve attended ephmra on and off for nearly a decade and can say with absolute confidence that this was the best year yet - a perfect balance of content spanning a variety of topics and customer groups and an exceptionally fun night of dinner and entertainment to cap it all off. Keep up the amazing work and this new high bar of excellence.”

Kelly Warth, Global Head of Data Strategy, Day One



“Another outstanding conference, showing once again why this is the “must attend” healthcare insights conference.”

Samir Paul, Instar Research

Read on to get a snap shot as to what were the key take aways from our Conference!

The Future of Insights in MR - Panel Discussion,

Panellists: Vijay Chand, Head of Transformation, Alexion; Dr Nick Coates, Global Director, Strategy & Innovation, C Space; Samantha Schofield, Global Strategic Insights Lead, Grünenthal Group

Convenor: Amr Khalil, Ripple international

→ Topline Takeaway:

The panellists asked delegates to vote for the top three topics to discuss - these were commercial storytelling, data rich or insight poor and synthetic data friend or foe. A fourth topic - human vs. machine - was also included in the discussion.

Beginning with storytelling, Nick urged delegates to think equally about insights and the method of delivering them and to stop talking about storytelling as 'qualitative fluff'. Samantha concurred with this and said that we should be crystal-clear on our business objectives which will drive the strategic narrative.

Moving on to data rich or insight poor, Samantha said that we are missing an opportunity to connect the dots and that it is essential to have clarity over the questions we are trying to answer. Vijay continued this theme by saying that we need a framework in place for which dots are connected and we need to ask ourselves if we are going to move the needle with our strategy.

Nick cautioned about the 'snake oil' in the topic of synthetic data friend or foe, while Samantha voiced excitement about the potential in this area, although warned that this type of data needs to be used transparently.

On the final topic of human vs. machine, Samantha said that this is not how it should be viewed - we don't need to be technical but we do need to know enough to be able to apply AI. Vijay put AI into context by saying that although the human experience may currently be missing, it will be present in 5+ years.



Using AI to unearth the 'past stories' to guide our future decisions

Speaker: Lucy Ireland, Branding Science

Convenor: Lauren Halliwell, UCB

→ Topline Takeaway:

Lucy's paper focused on how we can make artificial intelligence (AI) work hard for us, and make our insights more valuable. Lucy sees AI as a transformational tool within the insights industry, akin to the invention of tractors for agriculture and farming, by undertaking "human-intensive" analysis which otherwise would be limited by time or cost constraints.

She highlighted three key areas for innovation: tools, thinking, and activation, and provided examples of how AI can be leveraged in each of these areas to help us develop more actionable recommendations and help us to better predict the future.

Using a balance of theory and case studies, Lucy demonstrated how AI can help us to analyse history, past stories, and analogues, along with societal trends and horizon scanning, to add value to our insights.

Finally, she provided a four-stage process for systematically identifying and reporting stories and trends, to facilitate the winning combination of Artificial Intelligence and Human Intelligence, which work synergistically to deliver greater value than either AI or HI alone.



From Glitches to Insights: The journey of AI avatars in healthcare research

Speakers: Katy Irving and
Rory Mitchell, HRW

Convenor: Mike Pepp, Beyond Blue

→ Topline Takeaways:

Katy and Rory shared with us the story of Frankenstein, reimagined for our digital age: the pursuit of applications on the leading edge of technology and what happens when it meets the real world: the development of interactive AI avatars.

Their experiments with this new technology explored the potential to use interactive avatars to help us simulate doctor-patient consultations.

This paper showcased both the technological theory and practical challenges of using interactive avatars, illustrated by videoclips of the experimental interviews themselves to help us see exactly how the technology played out in “real life”.

Our speakers shared HRW’s journey of exploration, with all its ups and downs, from finding a suitable tool from which to begin experimenting, through the development phase of helping an avatar to become more “human”, and concluding with candid learnings, through to recommendations on future use cases and sage advice on how to proceed with caution!



The Power of Passive – how it addresses the omnichannel challenge / Would your customers lie to you? Telling the Truth with Passive Tracking

Speakers: Xierong Liu, IPSOS; Hiren Odedra, Roche

Convenor: Georgina Cooper, Basis Health

→ Topline Takeaways:

Xierong and Hiren addressed the challenge of the accuracy of self-reported data when exploring a customer’s digital channel behaviour. With a series of examples, they demonstrated that passive tracking can be an effective tool for overcoming the “say-do” gap and delivering accurate insight to guide customer engagement strategies.

Our speakers contrasted the structured, orderly, experiences reported by Healthcare Professionals (HCPs) with real evidence from passive tracking that demonstrated the chaotic, fleeting and highly variable reality!

They highlighted some of the challenges of collecting and interpreting digital journey data, from a respondent’s willingness or ability to report accurate information, through to the challenges of delivering an optimal customer experience when we lack the accurate information from which to truly understand our customers.

Xierong demonstrated how passive tracking could provide a solution to the gaps in our data. Our speakers debunked some common myths contributing to barriers to embracing passive tracking, and provided practical hints and tips to overcoming any operational challenges, before highlighting some examples of valuable insights emerging from the data.

Hiren shared the impact that passive tracking studies have had within Roche, and encouraged us all to be inspired with new ideas of how to engage with our customers.



Reality Based Forecasting

Speaker: Richard Murgatroyd, Roche

Convenor: Erik Holzinger, groupH

→ Topline Takeaway:

Richard's paper looked at the factors behind reality based forecasting, why the curve of optimism around a product launch drops and what we can do to prevent this from happening. This paper is a version of an article published in Q1 2025 in Foresight, a non-pharma journal.

Pharma is all about the pipeline and although it is a big global market, it is a risky one, with only 1 in 20 molecules reaching the market. Most forecasts are based on a series of numbers that are used to identify the 'gold nuggets' and it is about sorting the wheat from the chaff. There are many different types of forecasting and Richard shared his experiences of how Roche works in this area.

Finally, Richard suggested a way forward for approaching forecasting based on four key factors: acknowledging high subjectivity, enforcing rules, generating probabilistic outputs and carrying out a peer review.



Driving Acceptance and Actionability of Engage 360 – a multicountry corporate reputation

Speakers: Virginie Kraif, BMS;
Allen Titto, ZS Associates

Convenor: Amr Khalil, Ripple International

→ Topline Takeaways:

Virginie and Allen shared the sometimes emotional journey of a robust and credible corporate reputation study that was not met with the praise and positivity that they were expecting.

Their paper described the strategic importance and methodological rigor of the project, and shared some key insights that changed the way BMS would interact with their customers. They also described the unexpected reaction from their initial audience, and the scepticism and criticism that greeted their insights.

Rather than be overwhelmed by this unexpected response, Virginie and Allen described how instead they changed gears and redoubled their efforts to think not just about what message was being delivered, but how it was being delivered. With a combination of determination, flexibility, transparency and effort, they addressed each stakeholder concern, expanding reporting to ensure audience understanding, and tailoring presentations to meet the needs of different teams and markets, helping the audience to view the results through a different lens, and transforming a difficult situation into an enduring success.



Cracking The Engagement Code: Modelling to maximise social media success for disease awareness

Speakers: Jamie Doggett, Humanity; Stephane Lebrat, Takeda

Convenor: Georgina Cooper, Basis Health

→ **Topline Takeaways:**

Jamie and Stephane's paper shared the case study of building a predictive model to optimise social media communications in the vaccines area.

Stephane summarised the dilemma facing Marketing teams trying to raise disease awareness using social media. Typical approaches for assessing and refining social media content rely on lagging indicators of retrospective metrics, along with live A/B testing which can be accurate but time intensive and often not feasible due to the number of variables. Content therefore is shaped by experience and intuition, rather than data-driven insights to help us optimise outcomes.

To address this, Humanity and Stephane created a predictive model, grounded in robust engagement metrics, and incorporating advanced analytical modelling including neural networking, natural language processing and correspondence analysis. The model was shown to be able to help the team to move from insight to foresight, predicting which social media content would resonate best with customers, and providing recommendations for optimising posts for maximum impact.

Our speakers shared the process of building the model, with all its challenges and creative solutions, and shared the impact that the tool has had on business decisions within Takeda. Jamie concluded with a call to action for researchers to use these tools as a step forward in leading the next wave of data-driven innovation and insight.



Who's Really Steering The Ship? Translating global brand strategy into insight-driven local plans

Speakers: Clare Carroll, UCB;
Rhodri Williams, Accenture Song

Convenor: Sarah Phillips, IQVIA

→ Topline Takeaways:

Clare and Rhodri's paper showcased how close collaboration between global and local teams can ensure that market research insights drive brand success, helping us to deliver the full potential of pharmaceutical assets.

Recognising the common challenge of developing a global brand strategy that can be successfully executed at local level, Clare shared the example of a new brand that was facing some local execution challenges, and the process that overcame those challenges. A structured framework was used to pull together a multitude of insights, starting with the articulation of the problems to collecting insights and co-creating a successful strategy and accompanying tactical plan, before bringing it to life for all stakeholders with some creative techniques.

Rhodri describe how to apply this approach to other situations, and summarised some key takeaways to help us embed insight-driven brand planning into our own organisations.



Reaching For The Top: How a client/ agency partnership conquered new heights in brand tracking

Speakers: Richard Head, Research Partnership;
Mattias Blomgren, J&J

Convenor: Letizia Leprini, Roche

→ Topline Takeaways:

Richard and Mattias used the analogy of mountaineering to describe the hard work, preparation, equipment and teamwork that enabled them to conquer new heights in brand tracking.

Mattias described the challenge that J&J faced, with a legacy tracking approach involving 150 different trackers with 60% duplication between regional and local team, with 40 different KPIs making it difficult to leverage the data for advanced analytics at scale.

The new tracking programme transformed this situation, delivering a state-of-the-art, future-facing tracker that delivers the right insight to the right people at the right time, driving brand performance at scale.

The paper described the modular, standardised but flexible platform that delivered insights via a user-friendly dashboard, and combined AI and human intelligence to maximum effect.

Our speakers also highlighted the challenges and creative solutions that were required throughout the process to achieve success, from initial stakeholder engagement to continuous refinement and development of inputs and outputs, all facilitated by collaboration and teamwork across both organisations.

Forecasting Roundtable: Conjoint and Qualitative Primary Market Research in times of AI

Speakers: Okke Engelsma, Cerner Enviza and Erik Holzinger, groupH

→ Topline Takeaways:

In their roundtable discussion, Okke and Erik looked at the use of AI particularly with Large Language Models (LLMs) but also more generally in terms of its current strengths and weaknesses.

Erik began by stating that while AI provides many benefits with LLMs, it needs to be used with clear caveats centred around the outputs being based on probabilities and a machine-learning model. Okke urged that we have to be selective and understand how the parameters inform results. Ultimately, you have to understand your data and you cannot automatically use an algorithm across different therapy areas.

Erik underlined that the human stays in charge and Okke added that the premise of AI is based on how the human brain works. It can do some things that we may find hard to do successfully.

Erik rounded up the discussion by saying that while AI can be helpful to brief yourself for a qualitative interview and make real-life conversation better, he does not want to leave explanations to AI for some time to come.



Driving Change In Prescribing Behaviour: What actually works

Convenor: Aurora Albert, Branding Science; Saumya Soni, UCL University

Convenor: Mike Pepp, Beyond Blue

→ Topline Takeaways:

Aurora and Saumya's paper shared insights from a rigorous analysis of behaviour change strategies used in published academic research studies, highlighting which specific behaviour change techniques (BCTs) were most effective in influencing prescribing behaviour.

Aurora recognised that our industry is adept at understanding the complexity of decision-making, but that we need to understand what will successfully drive change in prescribing behaviours. To address this knowledge gap, Aurora and Saumya analysed the BCTs from 21 published studies to identify which behaviour change strategies were used the most frequently, but also which were the most effective.

They shared key insights from this analysis, identifying the BCTs that led to greatest behaviour change, with case studies providing concrete examples of how the interventions were used in real life.

They concluded with a recipe for success, highlighting key hints and tips for our industry to drive behaviour change and improve outcomes for patients.



Tackling The Obesity Crisis Using Behavioural Science 2.0

Speaker: Chris Harvey, Activate Research

Convenor: Sarah Phillips, IQVIA

→ Topline Takeaways:

Chris's paper took us from Behavioural Science version 1.0 to the emerging Behavioural Science version 2.0. Instead of a narrow, individual-centric focus on how Systems 1 and 2 affect behaviour, Chris described the need for a more holistic approach, based on the new idea of a 'system of behaviours'.

Using the example of the obesity crisis and the need for healthy eating, Chris noted this seemingly simple goal is often very difficult to achieve. He led us through a 4-step approach to exploring the system of behaviours associated with healthy eating. He highlighted how this approach not only deepens our understanding of behavioural challenges people face but also enables us to think more creatively about how to help people achieve desired goals.

Chris ended by touching on how the idea of a system of behaviours can be applied to the healthcare industry, and urged us to consider this the next time we use primary or existing research to tackle behaviour change challenges.



Piecing Together the Caregiver Experience: A mosaic of challenges and insights

Speakers: Kilian Teutsch, Boehringer Ingelheim;
Abigail Graham, HRW

Convenor: Herminder Bains, The Planning Shop

→ Topline Takeaways:

Abigail and Kilian shared the learnings from a study exploring the caregiver experience in schizophrenia, revealing the significant caregiver burden, and identifying ways in which the pharmaceutical industry can support caregivers throughout the patient's treatment journey.

The research was designed to uncover the reality of the caregiver experience to aid the launch of Boehringer's novel personalised app-based Prescription Digital Therapeutic (PDT). This PDT will be prescribed by a physician and uses clinically proven (FDA approved), efficacious and safe psychosocial techniques to support patients.

The multi-phase methodology encompassed an online bulletin board including a range of tasks such as writing a letter to schizophrenia about how it impacted their lives. Linguistic analysis provided a deep understanding of the emotion behind the letters, and guided the scope and tone of the product communication strategy. Qualitative interviews provided impactful, emotional narratives demonstrating the physical, emotional, financial and social impact of caregiving.

Kilian shared the strategic impact that the research has had for Boehringer, and how their communication with stakeholders including caregivers has evolved as a result. Abigail reflected on the implications of these insights beyond schizophrenia, and our speakers concluded with a call to action for our industry to recognise the importance of caregivers as stakeholders in their own right, and support them along with the patient, throughout the treatment journey.



Integrating Real World Evidence (RWE) into Human Factors Testing Criteria and Reporting

Speaker: Victoria Barnosky, Suazio

Convenor: Elizabeth Kehler, Adelphi

→ Topline Takeaway:

Victoria's paper looked at retrospective usability testing through a study involving Real World Evidence (RWE) in the use of a wireless fetal Doppler device.

Retrospective usability testing is used when elements of the user workflow can be captured within the device or during the use process. In the study, which involved a large amount of data gathered in the US, Europe and Australia over two years, strict inclusion and exclusion criteria applied, based on the use of the device itself. The tasks for the participants fell into three categories of critical, essential and non-critical and four major tasks were measured: frequency of use, search duration, measurements per second and session quality.

Victoria explained that the device had two non-compulsory surveys embedded in it. The majority of the users were happy that they did not have to visit their doctor to measure the fetal heart rate, although some reported that they would have been more comfortable in doing so.

The retrospective approach was most appropriate for this study because there was a large database of users and it involved no risk to them as they were already collecting the data. The end goal was to submit for regulatory approval i.e. aligning with FDA and MDR guidelines.



Human-Out-the-Loop? When is Human in the Loop actually hindering our insights?

Speakers: Viv Farr and Sian Guthrie, Narrative Health

Convenor: Jocelyn Archbold, Jazz Pharma

→ Topline Takeaways:

This paper examines how removing human moderators from the research process can enhance the quality of insights in specific contexts. It presents three key areas of focus: research on stigmatised topics, research with teenagers, and studies involving traumatic experiences.

In research involving more stigmatised subjects such as weight or sexual health, participants often struggle to share their full experiences due to social biases and fear of judgment. The use of AI moderators in anonymised environments has been shown to foster greater openness and honesty.

Teenagers and young adults, typically a challenging demographic to engage, respond more positively when research is conducted on their terms. AI moderation enables flexible, self-paced participation, reducing pressure and formality of an interview setting.

Finally, when exploring traumatic experiences, participants may feel compelled to present a more positive narrative as a form of self-protection or to shield others. By removing the human moderator and incorporating journalling methods, individuals are given the time and emotional space to reflect and share more authentically.

Researchers must be mindful of the subtle pressures they may place on participants. Sometimes, stepping back yields the most authentic data.



The Treatment Persistence Puzzle: Cracking the code of treatment adherence

Speakers: Mandira Kar, Research Partnership; Ana Claudia Alvarez, Sanofi

Convenor: Elizabeth Kehler, Adelphi

→ Topline Takeaways:

Persistence Puzzle is a compelling case study on why patients struggle with adherence to chronic therapies, even when treatments are effective. The goal was to uncover real-world drivers of adherence to inform a global action plan and multi-channel strategy beyond traditional Patient Support Programmes.

The study used a rich, multi-method approach—combining qualitative and ethnographic research—enhanced by experts in sociology, anthropology, and behavioural science. This multidisciplinary lens revealed cultural differences and root causes often missed by conventional research.

The paper highlights the study's impact on the Dupixent business, including the creation of a behavioural blueprint with stage-specific interventions. Cultural insights enabled tailored PSPs, immediate market-level actions, and long-term strategic shifts in HCP engagement, PSP investment, and brand planning.



Long Live Ethnography: Learning from a menopause case study, getting us closer to the lived experience

Speakers: Lizzie Eckardt STRAT7 Incite and Maria Colarusso, STRAT7 Jigsaw

Convenor: Tracy Machado, Elma Research

→ Topline Takeaways:

Lizzie and Maria's paper shared a self-funded study to compare the relative benefits and limitations of traditional vs digital immersive ethnographic research approaches.

As the pharmaceutical industry continues to become much more customer-centric, they explained, ethnography, in all its forms, remains the gold standard customer-centric methodology to help us truly understand our customers. However, there are clear limitations of both traditional ethnography and its younger sister, digital ethnography.

Using a case study conducted on the often-emotive topic of menopause, Lizzie and Maria showed us the rich insights that can be obtained from each approach, with a candid evaluation of the benefits and limitations of each.

They concluded that where traditional ethnography reveals very rich, emotional insights, the digital approach captures the breadth of respondent experience over time. They left us with hints and tips of how to maximise the value of digital ethnography, and how to combine both approaches for greatest impact and insight.

A Case Study in Giant Brain Aneurysms - How a patient-centric approach leads to better outcomes

Speakers: Stephen Potts, Purdie Pascoe and Dr Sergios Gargalas, St George's Hospital

Convenor: Amr Khalil, Ripple International

→ Topline Takeaway:

Stephen and Sergios' paper focused on Stephen's personal journey, in recovering from a giant brain aneurysm, and the learnings from this for pharmaceutical market research and the wider healthcare industry.

Sergios outlined that a brain aneurysm is an area in a weak blood vessel in the brain that balloons out and fills with blood. In some cases, it can rupture which is the biggest risk and which leads to a haemorrhage. Stephen had a giant brain aneurysm - these are rare and have a diameter of 25mm or more.

Stephen described the different stages of his aneurysm, with one of his key takeaways being that if you motivate patients, and have all healthcare practitioners working in unison, the outcome can be so much better. For example, he benefited from therapists who enabled him to focus on his own personal interest in fencing to help him in his recovery.

Stephen concluded with his other learnings that healthcare succeeds when it prioritises patients' physical and emotional needs and when all healthcare professionals work in sync to achieve the best results.



Bringing Patient Centricity To A Broader Audience Via Academic Publication: insights from a global patient experience study on genetic testing in mCRPC

Speakers: Rob Seebold, buzzback and Katie Pascoe, J&J

Convenor: Xierong Liu, Ipsos

→ Topline Takeaways:

Rob and Katie's paper showcased how to take a primary market research study through to peer-reviewed academic publication.

The paper described how primary market research was used to explore the patient and caregiver experience in metastatic castration-resistant prostate cancer, highlighting the emotional and practical impacts at different stages of the cancer journey. These insights were used to shape market access activities, including the Global Value Dossier. Designing the survey with the end-goal of academic publication in mind facilitated a smooth process involving multiple internal and external stakeholders who were able to work together to facilitate success.

As well as sharing the case study of this particular survey, our presenters provided a step-by-step guide to the process, and highlighted hints and tips to bear in mind.

They concluded with a call to action for all of us to consider taking primary market research insights through to academic publications, bringing additional value to internal stakeholders as well as bringing the patient voice to wider audiences. »

Evolving Market Research: Designing dynamic deliverables for a sustainable future

Speakers: Georgia Culley, boxee group;
Katy Bunn, Chiesi UK

Convenor: Samir Paul, Instar Research

→ Topline Takeaways:

Katy and Georgia's paper recognised the range of pressures that Healthcare Professionals (HCPs) across the globe might face, and used the example of environmental sustainability targets in the UK's National Health Service (NHS) to share a case study on how to understand your stakeholders and develop dynamic research outputs that can adapt and grow over time, rather than remaining a static one-off deliverable that quickly becomes obsolete.

The paper described the process of developing a simple, interactive tool to help Chiesi UK understand regional guidelines differences in order to tailor regional strategies and discussions. Through a series of stages from desk research and qualitative interviews to reflection and iteration, the team developed a web-based interactive map to access pertinent information about each region's formulary rules and preferences, to help them deliver the most value to their customers. They described how a "one-off" deliverable transformed into an ongoing iterative tool, adjusting to changes in the environment and incorporating feedback from stakeholders to refine each iteration.

They concluded that long-term partnerships with agencies and broader stakeholders can facilitate actionable insights, and that a move to dynamic deliverables maintains value with ongoing relevant and flexible learnings.



Beyond Recall: Uncovering True HCP Decision Journeys

Using simulated patients' cases to assess the clinical decision-making process of HCPs

Speaker: William Neill, Adelphi Research

Convenor: Tracy Machado, Elma Research

→ Topline Takeaways:

William Neill's presentation introduced an approach to understanding how physicians make real-world decisions. By moving away from traditional market research, which is often reliant on recall and self-report, he showcased the value of simulated patient consultations. This method enables direct observation of the clinical decision-making process as it happens, leading to richer, more actionable insights.

Central to this approach is the careful construction of authentic patient cases. William outlined a stepwise process: start with clear objectives, work closely with a clinical steering committee to ensure realism, and pilot cases to refine them for both depth and feasibility. Scenarios are presented to HCPs in interactive stages, mirroring actual consultations and encouraging genuine clinical reasoning.

The benefits are clear: this methodology not only pinpoints the root causes of diagnostic delays but also reveals barriers that can be addressed with targeted education or interventions. The credibility and depth of the findings make them valuable for publication and broader industry or clinical dissemination, extending the impact far beyond the immediate research team.

The Virtual Moderator Revolution: How AI chatbots are driving innovation in healthcare Market Research

Speakers: Samy Issaoui and Joe Perluzzo, Instar Research

Convenor: Georgina Cooper, Basis Health

→ Topline Takeaways:

Samy and Joe's presentation examined the evolving role of AI in market research, with a deep dive into how AI-driven virtual moderation is reshaping the way that we collect qualitative insights within quantitative studies.

The challenge of trying to balance the depth of human nuance obtained from in-depth qualitative research against the reach and statistical confidence of quantitative surveys is very familiar to most of us, but Samy and Joe outlined how as AI matures, AI Moderators can help to bridge the gap between statistical significance and understanding the "why" behind the numbers.

With a series of examples and case studies, our presenters demonstrated how AI Moderator tools can analyse responses in real-time, simulating a realistic conversation that elicits more detailed and actionable insights than a traditional open-ended question we might include in our quantitative surveys. The ability of AI Moderation to identify and address disconnects or inconsistencies within a survey means that clarification can be sought in real time, delivering reduced ambiguity, exploration of sentiment and checking for logic, all alongside enabling qualitative insight to be gathered at scale from quantitative samples.

Concluding with some practical considerations and limitations for the virtual moderator tool, our speakers left us with a summary of the benefits of AI moderation, as well as the places where human-led qualitative research remains a more effective approach, and provide a quick snapshot of the future for AI in market research.



Patient Voice – the red thread through the drug development lifecycle

Speakers: Susann Walda, IQVIA and Victoria Siegrist, Roche

Convenor: Letizia Leprini, Roche

→ Topline Takeaway:

Victoria and Susann shared a case study exploring the importance of incorporating the patient voice in early product development. Their case study in obesity reflected Roche's extensive development portfolio in this area, and the importance of understanding all stakeholders in order to differentiate their assets in line with customer benefits and their impact for people living with obesity.

Engaging the right people at the right time involved different target audiences from individuals, through informal support groups and influencers to online communities and expert patients. Using Advisory Boards, virtual meetings and one-to-one interactions, as well as facilitating peer-to-peer communication to share experiences and best practice, the team established two-way communication to elicit invaluable insight on clinical trial design and Patient-Reported Outcomes, recruitment and retention strategies, and co-creation of support materials, as well as sharing findings and providing transparent feedback on which actions would be feasible and where the limitations might lie.

The outputs included a clinical trial playbook to embed the knowledge and learnings across multiple internal teams, ensuring that clinical trial activities reflect the patient experience.

Our speakers left us with a comprehensive "cheat sheet" of considerations for our own successful patient engagement.



Unlocking Prescription Drivers: Integrating a driver analysis suite with behavioural science

Speakers: Daniel Kok, SKIM and Bipul Ayan, BMS

Convenor: Xierong Liu, Ipsos

→ Topline Takeaways:

Daniel and Bipul's presentation showcased how four complementary analytical techniques, spanning behavioural science and driver analysis, were integrated to deliver actionable insights for a brand team aiming to optimise product performance six months post-launch in a competitive market.

First, the COM-B behavioural science model was applied to identify and map the key drivers influencing prescribing behaviour. Next, Shapley Values analysis was used to quantify the relative importance of each driver. Bayesian network modelling then explored the interconnections between these drivers, revealing how different sequences of activation could lead to the desired behavioural outcomes and highlighting alternative pathways to achieving the business objective. Finally, Expectation Analysis assessed individual brand performance within the competitive landscape, identifying strengths, weaknesses, and the most effective strategic routes tailored to your brand.



The Power of Words: in Sickness and in Health

Speakers: Mike Pepp and Sam Hope, Beyond Blue

Convenor: Herminder Bains, The Planning Shop

→ Topline Takeaways:

Sam and Mike shared insights from a study exploring the Wellness market, which is characterised by themes such as self-optimisation, self-enhancement and health supplements – a market that is set to grow larger than the global pharmaceutical sector. Noting the meteoric rise of Wellness over the past years, Sam and Mike decided to deep dive into what makes it successful, hoping to identify any approaches or strategies that could enhance our work in the pharmaceutical sector.

The project took a multi-stage approach from hypothesis formation and desk research through social media listening and AI analysis to distillation of strategic recommendations for pharmaceutical industry interventions, recognising the limitations of our highly-regulated industry and that some of the ideas gleaned from Wellness would need to be adapted to the reality of pharma.

The paper highlighted key learnings and identified potential success factors, such as the role of emotional engagement with brands, the importance of a modest but achievable value story, and the different factors impacting adherence at different timepoints.

Sam and Mike used these insights to provide us with clear, practical suggestions for building powerful and impactful positioning and communications strategies in pharma.

Amplifying Patient Voices: an ERG and Community-Based Approach to LGBTQIA + POC Patient Research

Speakers: Kyle Haynes, Elma Research and Christine Taylor, Gilead Sciences; Sylvia Alfred, Gilead Sciences Europe; Chloë Davies, UK Black Pride and Crystal Todd, Black Beetle Health

Convenor: Samir Paul, Instar Research

→ Topline Takeaways:

A true partnership between a client, an agency and community groups was at the heart of the paper from Kyle and Christine, who were joined by Chloe Davies of Black Pride and Crystal Todd of Black Beetle Health. Together, they discussed a collaborative approach to conducting research on health inequality in the LGBTQIA+ space.

Although this is a vibrant community, their voices (individually or collectively) are rarely heard in market research. Access to healthcare services has long been an issue for them and the co-created research aims to highlight key issues more specifically.

Each panellist gave their own perspective, including their motivation for participation and the challenges they have experienced to date. Kyle emphasised that Black Pride and Black Beetle Health were completely at the centre of the approach and Christine outlined the distrust that these communities have historically felt towards the healthcare system. Chloe and Crystal concurred that building trust would be a major factor but they also expressed their optimism about what the co-creation process will bring. All of the panellists concluded with some thoughts for anybody looking to work on this type of project in the future.



Which Of Your Stresses Are Working For You? Some stress is good for you

Speaker: James Pickles, Certified Performance Coach

Convenor: Sarah Phillips, IQVIA

→ Topline Takeaway:

James shared a very personal and impactful account of his journey to understanding and controlling stress, sharing the events that led to a severe physical and emotional breakdown as a result of relentless stress.

He then took us with him on his quest to understand the impact of stress on our mental and physical wellbeing, using examples from published scientific studies to demonstrate the impact of both stress and of some mitigating tactics that we might employ to manage and channel stress for our own benefit.

He highlighted that, sometimes, stress can be beneficial to performance and happiness, but that the key to managing stress is in ensuring that we feel we have some control over the stressors. He reassured us that, with practice, we can learn to exist in the optimal section of the Stress Curve, helping us to optimise our performance and achieve our goals.

He concluded with a practical session to identify real-life challenges to our sense of control, and highlighting some tips and tricks to help us manage stress to the advantage of ourselves or those around us, encouraging us to continue the conversation and find our own solutions to optimising the impact of stress. »

Building Synthetic Participants: Leveraging Generative AI to bring the customer to life and deliver ongoing value

Speakers: Damian Eade, Lumanity and Kristina Ogneva, J&J (Mattias Blomgren, J&J stepped in to present on the day)

Convenor: Letizia Leprini, Roche

→ Topline Takeaway:

Damian and Kristina shared a thought-provoking paper showcasing the use of synthetic research applied to segmentation. Bringing us all up to speed with a quick overview of synthetic research, Damien and Kristina then outlined a recurring challenge within market research: that of underutilised research outputs which sit on a metaphorical shelf, rather than being actioned and embedded in our business decisions. J&J faced this challenge, and used AI to create a simple, intuitive tool that engaged the sales force and inspired action in the real world.

The paper highlighted some key challenges that the team faced when developing the tool, from dealing with calculated risks, and finding the optimal balance between accuracy and authenticity, through to ensuring a human-first approach when building a tech solution. Our speakers shared the process of developing and testing the tool, as well as highlighting key use cases which facilitated implementation and further refinement.

They left us with examples of key learnings and implications, based on practical stories of impact of the tool within J&J.



Unlock the Hidden Goldmine: Making Strategic Decisions Without New Research

Speaker: Su Sandhu, SkyBlue Healthcare and Joanna McDonald, GSK

Convenor: Lucy Ireland, Branding Science

→ Topline Takeaways:

In this paper, Su and Joanna shared case studies using secondary research, supported by AI and a structured smart analysis framework, to answer complex business questions, and therefore maximising the value of our existing research.

Our speakers recognised that the idea of conducting secondary research before primary is not new, but observed that the advent of AI has enabled us to step up a gear in secondary analysis, accelerating, broadening and deepening our findings and helping us to add greater strategic insight to our strategic recommendations.

The case studies demonstrated how a skilled search can identify insights to shape strategic decisions, while saving time, cost and effort that can then be utilised in other priority areas.

Su and Joanna left us with key takeaways from the case studies, along with an action plan for our return to the office on Monday morning!

The 360 Degree Approach: unlocking the power of patient voice and co-creation

Speakers: Emma Keetels, SKIM and Nassima Trad, BMS

Convenor: Tracy Machado, Elma Research

→ Topline Takeaway:

Emma and Nassima's paper showcased a patient-centric approach to developing patient support initiatives, involving different stakeholder perspectives which were brought together to give a 360-degree view of patient needs.

The approach involved five discrete stages, alternating between project stakeholder team discussion and research inputs, with each stage informing the next. Insights from one stakeholder group were used as stimulus to drive discussion within subsequent stakeholder groups, challenging the inherent biases of each individual perspective.

Our speakers identified three key learnings from the project:

- The importance of involving key stakeholders from the very beginning of the project and throughout
- The benefit of immersing stakeholders in the patient experience to help them set aside their own biases and recognise the patient perspective
- The synergistic value of building on different stakeholders' perspectives to develop more powerful insights than relying on individual perspectives in isolation

Co-creation between the different stakeholder types (patients, HCPs, patient organisation and the BMS internal team) generated powerful, validated insights which led directly to actionable implementation.



Meeting Patients Where They Hang Out

Speaker: Rachel Lawes, Lawes Consulting Ltd

Convenor: Viv Farr, Narrative Health

→ Topline Takeaway:

Rachel's paper showcased rich examples of semiotics and discourse analysis, highlighting some key discourse strategies commonly seen in everyday conversations and particularly in online conversations, and challenged us to think of ways that we could employ discourse analysis to enhance the quality and richness of our marketing communications.

After an overview contrasting different research methods from psychology and culture, Rachel shared examples of semiotics (the visual signs and symbols used to communicate) used to communicate about antidepressants on social media, and how they can be distinctly different for different brands.

She then took us on a whistlestop tour of discourse analysis, exploring how people talk to each other and the strategies they use to communicate about antidepressants. She focused on discursive myths (representing an iconic story with the power to explain problems), particularisation (strategies used to discredit or destroy unpopular opinions) and category membership (a strategy used to award ourselves authority when communicating with others).

Rachel concluded with some examples of using practical applications of discourse analysis in the pharmaceutical industry, to engage patients and invigorate our communications. She reminded us that our therapy areas and products are being discussed every day by patients on social media, and that we can join those conversations to make them better quality, more accurate, and a richer experience for patients.



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