

ARE WE MISSING INSIGHT? IMPROVING THE TOOLS

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SETTING THE SCENE AND IDENTIFYING THE CHALLENGE

Why Are We Here?

- Market vision 'demands' more insight into the future needs of customers
- However information gathered today is used to make decisions 8 – 10 years hence. Can we improve this process?
- Traditional pharma market research does not explore the 'youth market' to understand the future needs or aspirations of the new generation that will lead uptake of new solutions
- We actively screen out recently qualified physicians
- Do we look to access forward thinkers as they might provide more insight and challenges?
- Opportunity to explore targeted customers: their dreams and aspirations for the future, solutions – would it be different?

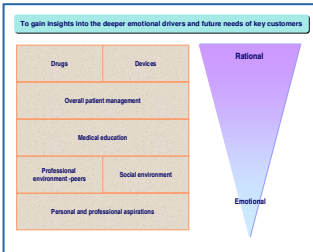


Figure 1: What is our key market research objective?

The Test Hypothesis...?

- Can younger physicians give more insight? AND/ OR
- Can the recruitment of 'future thinkers' provide more insight?
 - Design to have four arms

Output

Younger doctors, better future thinkers or can screeners identify future thinkers?
Younger vs Older: is there a difference?

Younger vs Older Doctors screened for innovation
Younger vs Older Not screened for innovation

REVIEW OF DESK RESEARCH

Recruitment Practices Within the Pharma Market

- Fieldwork agencies in Europe and the USA confirm the Adelphi approach to be typical/standard
- Only 1 agency (USA) reported occasional use of additional and 'unusual' screening criteria
 - Use of technology
- Cautious responses suggests a need to manage any development in the field

Recruitment Practices in Other Sectors

- Consumer**
 - Very common to target the youth population for new trends research
 - Use attitudinal and behavioral screeners to identify 'trend setters' (i.e. where they buy clothes from, perceived influence on friend's fashion choices etc.)
- Government**
 - Attitudinal scales (e.g. to identify conservative and liberal thinkers)
- Social**
 - High use of socio-demographic criteria in screening (i.e. lifestyle factors in addition to more traditional demographics)
- Financial and B2B**
 - Use of technology/Internet considered to be an indicator of innovation/progression

"It is inappropriate to ask doctors whether they are married or have children. They are professionals and we must be careful not to annoy them at this early stage with irrelevant questions" (Spain)

"We tend to suggest state of qualification rather than age as there is one HR company over here that is currently being sued for age discrimination" (USA)

USING RESEARCH TO MEET THE OBJECTIVES

- Mini-group: 4 physicians
 - Scene setting creative discussions
 - Break out into pairs for 'future visioning'
 - Compare and contrast views from the two pairs

IMPLICATIONS FOR 'MINING FOR UNMET NEEDS'

Implications for Recruitment?

- Looking beyond hospital size, drug prescription, etc., would appear to be quite a new step in pharma research
- Age is certainly one untapped area that may yield some interesting differences
- What about other lifestyle factors?
 - Life stage, lifestyle, leisure activities, etc.
- Screening on attitude/behavior (other than those related to drugs prescribed) is also uncommon:
 - If we go down this route, do we develop our own tools or use those that have been tried and tested in other markets?
 - What attitude/behavior would be most useful on which to screen?

Examples of Marketing Scales

Consumer Innovativeness

- Consumer novelty seeking
- Seven-point scale ranging from strongly disagree to strongly agree
- I often seek out information about new products and brands
- I like to go to places where I will be exposed to information about new products and brands
- I like magazines that introduce new brands
- I frequently look for new products and services
- I seek out situations in which I will be exposed to new and different sources of product information
- I am continually seeking new product experiences
- When I go shopping, I find myself spending very little time checking out new products and brands
- I take advantage of the first available opportunity to find out about new and different products

Rational – Experiential Inventory

- Need for cognition (19 item and 5 item) and faith in intuition
- Five-point scale ranging from completely false to completely true
- I don't like to have to do a lot of thinking
- I try to avoid situations that require thinking in depth about something
- I prefer to do something that challenges my thinking abilities rather than something that requires little thought
- I prefer complex to simple problems
- Thinking hard and for a long time about something gives me little satisfaction

THE TARGET AUDIENCE IS...

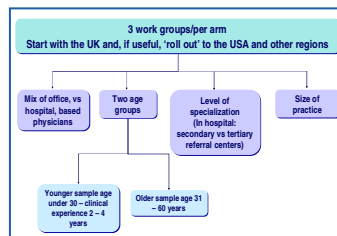


Figure 2: Sample

ANALYSIS ISSUES

Analysis Plan

- Content analysis based on transcripts:
 - Eliciting common concepts/emotions/drivers across interviews
 - Cross-analysis of different arms to establish if differences/similarities exist
 - Verbatims in English
 - Analysis managed by senior director
- Double-blind analysis?
- How do we measure 'better responders' through analysis?

STUDY LOGISTICS AND IMPLICATIONS

Recruitment Issues

- An average of 1 in 12 respondents positively screen as forward thinking
 - 3 times more than the usual screen to recruit ratio
- Theoretically, targeting specific age groups should not impede recruitment
 - 16% of UK GPs aged under 35
 - 37% of UK GPs aged 36 – 44
 - 32% of UK GPs aged 45 – 55
- Realistically however, agencies respond to industry trends and do not have an existing network of contacts with younger doctors
 - Longer time required for the recruitment of younger doctors until agencies have established systems/contracts

- This research was conducted in a UK setting. Initial discussions with international partner agencies suggests:
 - Considered inappropriate to ask doctors for personal information/Views
 - Strong rationale and education of agencies required
- Qualitative feeling that mixed gender groups are more productive when completing creative tasks
- Smaller samples of forward thinkers should yield a greater range and quality of ideas than more traditional qualitative groups. However, will this be a hard sell to clients???

Screeners Analysis

- Analysis of screener responses suggests that 2 questions are most discriminate in segmenting FTs and NFTs
- Within these, we are able to identify 6 specific questions which are most discriminating
- Tool identify different – forward thinkers established now needs more validation

Experimental conclusion: forward-thinking ability is a stronger discriminator of generating unmet needs than age BUT has a greater role to play amongst non-forward thinkers

