

Healthcare Market Research Tools

5.1 A-Z summary of research approaches

Adjectivisation - An enabling technique used to understand their attitudes to brands by asking respondents to describe what it would be like if they were to have 'product x'ed' a patient? What would it be like to have a (for example) 'Losec' moment?

Automatic Interaction Detection (AID) - A computer-generated statistical approach used in quantitative market segmentation to identify the factors that are most influential in driving willingness to use a product. AID is a useful alternative or adjunct to cluster analysis.

Behavioural Economics – Behavioural Economics is the study of situations where people make choices that do not appear to be economically rational and is associated with the work of Daniel Kahneman, who won the Nobel Prize in 2002 for having integrated insights from psychological research into economic science and subsequently wrote the classic text "Thinking Fast and Slow".

Brand Analogies - The respondent is asked to imagine brands as animals, cars or other objects. Which car exemplifies the qualities of our brand? Why? A useful approach to exploring emotional reactions to brands but now perhaps an over-familiar technique to many respondents.

Brand Essence - The central premise (or promise!) of a brand around which the communication strategy can be designed. Typically the brand essence is regarded as a two-word summary of the elements of the brand that are emotional, rational and differentiating.

Brand Idealisation - A qualitative technique used to explore unmet emotional needs. Respondents are asked to describe the ideal brand and discuss what it has in common with and what differentiates it from existing brands, with particular focus on the client's brand.

Brand Mapping - An approach (either qualitative or quantitative) used to understand the nature of brand perceptions, which displays the relationship between brands on a visual map; those brands that are seen as similar are situated close to each other, those that are dissimilar are far apart. In qualitative research the map is derived by asking respondents to perform this task, in quantitative research the map is derived from exploring attitudes to brands on a number of scales.

Brand Party - As an adjunct to brand personification, respondents are invited to imagine the various brands are at a party. Who gets on with whom? Who is the life and soul? Who is the outsider?

Brand Postcards/Press release - Respondents are asked to write a postcard that the brand has sent them from holiday. Where has it gone? Why? Alternatively, the brand has written a press release about itself. What did it say?

Brand-Price Trade-Off - A pricing technique in which respondents are exposed to a number of brands at various price levels. See Pricing Section for more details.

Brand 'Room' - The respondent is asked to imagine they are walking down a corridor and they come to a room with the name of the brand on the door. They open the door and walk in. What is inside the room? What do they see? Hear? Feel?

Brand Village - A variation on the 'Brand Party' whereby each brand represents a building in a village. Which is the grandest building? Which is the oldest- is it still standing? Which would you want to live in?

Bubble Diagram - A projective technique (based on the Thematic Apperception Test used in psychology) used to help understand feelings about a situation. The respondent is given a picture that has a blank thought bubble, in which the respondent fills in what they feel would be said or thought in the situation illustrated. For example the picture could be of a woman saying to her doctor 'I have depression' and there be a blank thought bubble above the patient's head and a blank speech bubble and thought bubble above the doctor's head. These would be filled in by the respondent to illustrate his feelings about the situation illustrated.

Bulletin Boards - Also known as bulletin board focus groups and time-extended focus groups, the boards operate like a secure online forum. Respondents are invited to participate over 3-4 days, and encouraged to log in at least once a day to provide answers both to the moderator's questions and to comment on answers from other respondents. Questions are asked over the course of the board, and stimuli such as images, video and quantitative questions can be introduced or modified based on earlier feedback. Questions can be asked of respondents individually or of the whole group as required.

Buzz Monitoring - A method of tracking and analysing the content or 'online buzz' of social media for mentions of certain products and services, both for client products and competitor services. Monitoring volume and content of online buzz can help assess customer experience and demand, and establish brand equity.

Clean Language - Clean Language is a communications methodology, developed by David J Grove, a New Zealand 'Counselling Psychologist', during the 1980s and 1990s. Clean language aims to elicit data from people without (as far as humanly possible!) biasing what they give you in either content or language used. The technique works within the context of each respondents 'personal metaphors' (see metaphors), their way of expressing thoughts, and emotions etc.

Cluster Analysis - A market segmentation tool that involves the grouping together of different customers by computer on the basis of the factors they share in common (usually in terms of their attitudes) to understand the different types of customer more effectively. Outputs usually identify 4-6 clusters of different customers, which can be used in developing targeting.

Co-discovery – Respondents are filmed using a product or service, or, in an ethnographic approach, going about their everyday lives. At the end of the session, the respondent watches the film of themselves using the product or service, and comment on what they were doing and feeling. This results in rich insights into the respondent's thoughts, processes and decision making.

Collage Boards - Respondents are provided with a pile of magazines and asked to design a collage which illustrates their feelings about a brand or disease. The approach can be very useful in understanding feelings about brands, which may be difficult otherwise to articulate verbally.

Conjoint Analysis - A range of approaches which identify the relative importance of clinical or other factors in product choice by asking the respondent to trade off choices between various combinations of different attributes (e.g. would you choose a product which is 90% effective with a 10% level of side effects or one which is 80% effective with a 5% level of side effects). Conjoint techniques include Simultaneous Multi-Attribute Level Trade-Off (Simalto), Adaptive Conjoint analysis (ACA), Choice Based Conjoint (CBC) and Full Profile Conjoint (FPC).

Correspondence Analysis - A multivariate analysis technique used to explore associations between different factors or issues: for example what perceptions of a brand are most strongly associated with higher prescribing?

Critical Success Factors - The issues regarded as vital to understand in a market to ensure the success of a brand.

Delphi study - Individuals are asked to predict future developments. They are then exposed to the information suggested by other participants in the Delphi exercise, and re-evaluate their predictions in the light of this. This approach helps generate a more accurate forecast.

Detail Follow Up Research - A study usually carried out by telephone among clinicians who have been seen by the representative to ascertain which messages were effectively communicated and the effect of the detail on commitment to prescribe.

Diary Study - The respondent is asked to keep a diary of all the patients seen over a certain time period (usually 1-2 weeks) and for each patient record a number of details e.g. diagnosis, symptoms, treatment etc. This approach can be useful in terms of obtaining accurate information about patient symptoms, diagnoses or likelihood of different patient types to be treated with a new product.

Duos - Research where two respondents are interviewed consecutively. Potentially useful to explore differences in attitudes e.g. between surgeons and physicians, GPs and practice managers etc.

Enabling techniques - A term often used interchangeably with projective techniques- 'enabling techniques' is a broader term that encompasses approaches which help the respondent to express ideas but not just by projecting these onto another situation.

Ethnography - An anthropological approach involving very close observation of the respondent in their daily life to understand their cultural environment; often becoming a participant; for example living with a family and during this time making contextual inquiries and documenting the traces that people leave as they go about their lives.

Extended Creativity Groups (ECGs) - A term sometimes used to describe groups where a number of projective techniques are used to aid the development of communication materials.

Factor analysis - Responses to a large number of questions are analysed to identify correlations between answers to different questions. This process determines the underlying factors that explain these correlations.

Folder test - Ads can be shown to respondents in the context of a mocked-up journal, the test ad being hidden among 20 other ads. The respondent is asked to flick through the 'journal' and asked to describe which ads were recalled and messages communicated for each brand.

Future Pacing - The process of asking respondents to put themselves in an imaginary future (for example, where the brand we are interested in is the most widely prescribed). What happened to make this situation come about?

Gabor Granger - A pricing research technique in which respondents are exposed to a test product at a range of different prices and asked to describe their willingness to use a product at each price. See Pricing Section for more details.

Gallery test - A method of ad testing which lays out a number of ads around a room and asks respondents to look at each in turn, prior to detailed discussion of each.

Gamification - A way of designing research to draw upon visual experience, language/ wording and motivational factors. It uses techniques such as placing boundaries around tasks or giving feedback and rewards to improve respondent experience and gain greater insight.

Guided fantasy - Any projective technique where the respondent is asked to imagine certain images or events- for example the 'brand room' approach.

Immersive Research - An online technique similar to ethnography which captures respondent behaviours, experiences and attitudes via an online blog or platform. Respondents are encouraged to upload text, images and videos over several days in response to questions from the moderator. Immersive research can include diary studies, photo tours, responses to stimulus materials and written narrative responses.

Kelly Grid / Kelly Triads - An enabling technique designed to understand brand differentiation, in which respondents are presented with three products and asked to describe reasons why two of the brands are similar and the third different. The 'different' brand is rotated to force

respondents to describe all the issues that differentiate between brands and the factors they have in common.

Language And Behaviour (LAB) profiling – LAB profiling was developed by Rodger Bailey in the 1980's. Used effectively, it helps understand motivational patterns and working preferences via the language patterns used by individuals. For example, LAB profiling identifies whether customers are:

- **Towards** or **Away from** – are they motivated by the promise of success or avoiding problems?
- **Internally** or **Externally** referenced – are they motivated by external sources of authority?
- **Options** or **Procedures** motivated - do they seek choice or prefer to follow processes?
- **Big picture** or **Detailed** in working scope – what level of detail do they prefer to work with?
- **People** or **Systems** oriented – do they focus on people or ideas in defining success?

By exploring these and 10-12 other motivational patterns, research can identify motivating language to use as the basis for an overall marketing strategy and specific communication approaches.

Laddering - A qualitative enabling technique which is useful for exploring motivations and values. It involves asking the respondent the reasons for their choice of a particular product and, for each of the clinical factors elicited, the respondent is asked 'why is... so important to you?' This provides a list of other issues which are important, and for each of these the question is again asked 'why is... so important to you?' This process is repeated until the respondent has worked his way back to some fundamental issues which are important to him or her, linked to the prescribing of that brand.

Market research online communities (MROCs)

Market Research Online Communities (MROCs) typically consist of an online community where members meet to discuss topics related to that community. Online communities can be used for research purposes, with moderators fielding questions to members, directing discussions and testing hypotheses; or they can be used as a more open discussion forum, with little direct moderator input, e.g. drawing insights from patient experiences from communities set up for a particular condition.

Mean, Median, Mode - Three different ways of calculating an average:

- Mean = sum of the set of responses divided by the number of responses
- Median = the mid-point response if responses are ranked from lowest to highest
- Mode = the most frequently occurring numerical response

Meta model - A powerful NLP tool for gaining a fuller understanding of attitudes and beliefs by unravelling the generalisations, distortions and omissions which can be used by respondents to provide a simplified response to straightforward questioning.

Metaphor – We all use metaphors to describe our feelings as this enables us to pass on information to others easily and quickly. Established metaphors have a shared meaning, often

culture dependent, while others have different meanings to different people. Encouraging the use of metaphor in market research can provide us with a much richer understanding of our respondent than simply asking direct questions.

Milton Model - A mirror image of the Meta model, in that questioning is deliberately "artfully vague" to allow the respondent to fill in the gaps with what is most relevant and immediate to them, searching for the meaning of the question from their own experience.

Mood Boards - Boards can be prepared prior to research which have different ways of expressing a particular concept- for example 'efficacy' could be visualised as an atomic bomb, a hammer, a reliable car, a gold medal etc. The images can form the basis of a discussion about what efficacy means in the market being discussed and the different ways in which different brands may be perceived to be effective.

Motivational Sort Patterns - A term from NLP/LAB used to describe the different way in which motivations operate - for example, are customers motivated by a desire to succeed ('towards') or fear of failure ('away from').

Multivariate Analysis - Any approach which takes a number of variables and analyses them to identify patterns in the data – e.g. the interaction between all the different demographic characteristics or perceptions of doctors on prescribing rather than looking at each variable separately.

Mystery shopping - Used extensively in consumer research in the retail sector, this is an approach where an interviewer pretends to be a customer in order to assess the service being provided by staff.

Neural Nets - A computer-generated approach to identifying relationships between data sets.

Neuro-Linguistic Programming (NLP) - A broad-ranging approach to consumer psychology based around the principles that thinking and behaviour is intimately related to our senses and the language we use; it has a variety of applications within market research, in particular the concepts of 'logical levels', 'modelling excellence' and 'motivational sort patterns'. See section 6.1 for more details.

Obituaries - The respondent is invited to imagine that the brand is a person that has died. What would they say about it?

Observational research - In Fast Moving Consumer Groups (FMCG) markets, researchers may seek to understand attitudes and behaviour by watching a consumer make purchases (also called 'accompanied shopping') or use products in the home (for example, how do consumers approach domestic chores?).

Occasion Imagery - Are certain products associated with certain occasions- for example, Lucozade used to be associated with being ill, and is now regarded as a health drink. Cereals may be more associated with breakfast time than other meal occasions.

Omnibus studies - Research where a number of clients can buy questions within a single survey being run with a particular group of customers.

Patient History Study - Research wherein the respondent is asked to refer to details of specific patients during the course of an interview. Useful for understanding the reasons behind specific therapy dynamics and assessing willingness to use a new product in the context of real consultations.

Personification - A projective technique wherein respondents are asked to imagine the brand as a person to explore their feelings about the brand and their relationship with it.

Positioning - The term 'positioning' is often used in one of two ways: as the patient types or doctor types who are regarded as most suitable for the brand; or the way in which the brand is presented to slot into the consciousness of the doctor- the 'hook' which is used to ensure the product is felt to have a role in the prescriber's armamentarium.

Pricing research - A number of approaches exist that have been designed to understand price elasticity including Gabor Granger, Monadic, Van Westendorp Price Sensitivity Meter and Conjoint/Brand Price trade-off (BPTO).

Projective Techniques - Approaches used in qualitative research that seek to identify attitudes and motivations that cannot be easily expressed by allowing the respondent to project these externally. Typical examples are personification, bubble diagrams etc.

Psychodrawing - The respondent is asked to draw their feelings about a situation; for example a doctor could be asked to 'draw cancer' and the image drawn used to stimulate discussion around the disease and its effect on doctors and sufferers.

Qualitative Simalto - An adaptation of the established quantitative methodology Simultaneous Multi-Attribute Level Trade-Off (Simalto) in which brainstorming and unmet needs identification are combined to indicate the relative importance of unmet needs in qualitative research.

Role Play - Inviting respondents to play the role of a representative, product manager or patient can be a useful way of understanding what is important to the respondent and how they think, while overcoming reticence to think creatively.

Salience - The front of mind presence, importance or emotional closeness to a brand or advertising approach.

Segmentation - The process of splitting customers in to different groups with the intention of being able to customise marketing or sales efforts to each different customer group. Markets can be segmented in many different ways e.g. geographically, in terms of social class, lifestage, behaviourally or attitudinally (e.g. values/aspirations).

Semiotics - The study of signs and non-verbal communication, usually in the context of understanding the culture that assigns meanings to such signs. For example, what is being 'said' when a doctor wears a white coat?

Sentence Completion - An enabling technique in which the respondent is provided with an incomplete sentence and asked to complete it- for example: 'It is important to treat depression effectively because....'

Social media listening / 'scraping' - Is the process of identifying and assessing what is being said about a company, individual, product or brand on the Internet. It's a 'passive' technique involving social media where there is no interaction with the respondents, it is purely viewing and can generate large amounts of data. Social media monitoring tools are used to mine text for specific keywords on social networking websites, blogs, discussion forums and other social media.

Tachistoscapy - A method of assessing reactions to ads or packaging on brief exposure to assess impact. The respondent has images flashed in front of them for very short periods of time (less than a second) and asked to describe what they see.

Talkie tapes - Instead of exposing respondents to visual stimuli, a 'talkie tape' can be played in a group or interview in which a conversation takes place, potentially describing what an ad agency is seeking to communicate in a given ad. The dialogue can be used to stimulate discussion about a particular ad approach and the extent to which the ad agency's objectives have been met.

Thematic Apperception Test - A picture around a situation which is left deliberately vague to allow the respondent to bring his or her own interpretation to bear on it- for example, a picture of a smiling doctor having just finished a consultation with a patient with asthma. The respondent could be asked what had taken place in the consultation, what was the doctor thinking, etc.

Transactional Analysis - A study of social intercourse which includes the famous 'Parent/Adult/Child' model of interpersonal relations, the importance of stimulus-hunger ('strokes') and the concept of 'games' as reflective of individual programming. (See; 'I'm OK You're OK' and 'Games People Play').

Trios - A group discussion comprising three respondents. Useful when there may be a need to explore and challenge individual attitudes and behaviour (sometimes called 'conflict trios') and can be more creative than a larger group due to the greater intensity of group dynamics.

Unique Selling Point/Proposition (USP) - The key benefit(s) of a product which is/are emphasised in marketing or selling the brand. Some consumer marketers now talk about the ESP (Emotional Selling Proposition) as being more important in poorly differentiated markets.

User Imagery - The type of individuals who are associated with using a particular product; for example in one research paper, sherry was associated with middle aged/elderly people and with Vicar's tea parties (!). It is useful to explore this issue to see if the brand is associated with aspirational imagery (e.g. 'successful people' or 'young people') or with 'people like me'.

Van Westendorp Price Sensitivity Meter - A pricing research technique whereby respondents are asked to describe the price at which (in FMCG markets) a product is regarded as

'inexpensive', 'expensive', 'so inexpensive as to make me doubt its quality' and 'too expensive to buy'.

Virtual Formularies - An approach where members of a formulary committee are brought together to discuss a formulary application for a new product. The discussion mirrors what would take place in an actual formulary application, so any potential barriers to acceptance can easily be identified and addressed.

Webnography - An online web-based approach to ethnography.

War Games - An approach where customers are asked to role play the members of two or more marketing teams to explore how different marketing teams might seek to compete with each other in future and how each might seek to respond to their competitors.

Word Association - A useful brainstorming technique often used to warm up a group – respondents are asked to describe any words they associate with a brand, disease or situation.

5.2 Behavioural Economics and MINDSPACE

Behavioural Economics is “**the study of situations where people make choices that do not appear to be economically rational**” and is associated with the work of Daniel Kahneman, who won the Nobel Prize in 2002 for having integrated insights from psychological research into economic science and subsequently wrote the classic text “Thinking Fast and Slow”.

Behavioural economics therefore provides powerful insights into the design and interpretation of market research, and into the implementation of healthcare marketing and sales activities to ensure these are effective in driving behavioural change.

The key principles of Behavioural Economics can be summarised as follows:



The UK government Behavioural Insights Team ('Nudge Unit') applies insights from academic research in behavioural economics and psychology to public policy and services. The Cabinet Office published '*MINDSPACE influencing behaviour through public policy*' which describes nine key influences on human behaviour based on research from the fields of social psychology and behavioural economics. These are described using the acronym **MINDSPACE: Messenger, Incentives, Norms, Defaults, Salience, Priming, Commitments, Ego**.

Please contact us if you would like to be emailed a copy of '*MINDSPACE influencing behaviour through public policy*' or any further information regarding the effective application of Behavioural Economics in healthcare market research.

5.3 Neuro Linguistic Programming - NLP

What is NLP?

In 2017, fields of knowledge exploring "brain, behaviour and change" are expanding at what seems like an exponential rate with new learnings all the time from Neuroscience, behavioural economics, psychology and NLP. NLP has been around since the 1970's but cutting edge NLP combines knowledge from this field with applied Neuroscience, identifying what is going on in the brain and thus contributing to an understanding of how and why NLP works. NLP is based on a combination of psychology and linguistics and enables us to explore the structure of human experience. It has also been described as "*the study of what works in thinking, language and behaviour*".

What does NLP stand for?

NEURO

Our neurological system, including our senses of sight, hearing, touch, taste and smell. The way these senses translate our experience into thought processes – both conscious and unconscious. The mind/body connection, and how each affects the other. How senses/stimuli make us think, feel and behave.

LINGUISTIC

The way we use language to process information or to make sense of our experience. The language that enables us to filter stimuli from the outside world. The language we use to communicate information to ourselves, and then on again to others.

PROGRAMMING

The thinking and behaviour patterns that we use every day. From the mundane (e.g. how to choose what to have for breakfast) to the far reaching (e.g. how one might experience depression).

Why use NLP in Pharmaceutical Market Research?

Thus, NLP represents a vital tool in our repertoire of qualitative, and indeed quantitative, research techniques. It can be applied to help us get beneath the surface of what respondents – patients, doctors or other healthcare professionals - are saying to us. NLP allows us to explore aspects or ideas at an implicit level – ideas that respondents may find it hard to articulate readily or clearly with their conscious mind.

In NLP we explore “*the difference that makes the difference*”. This could be explained as the missing piece of the jigsaw that enables us to understand a process at the deepest level, create a desired behaviour or even facilitate change.

In summary, how can I utilise NLP?

- To more deeply understand both the conscious and unconscious motivations of health professionals.
- To get beneath the surface, explore how patients experience their condition and its treatment, and thus yield rich, actionable data.
- To apply knowledge of language patterns and other filters to maximise effective 2-way communication with both patients and health professionals – with the potential to influence their behaviour.

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5.4 Significance testing

The table below shows the probability of a finding being not due to chance. For example, with a sample of 1000, if 50% state that they use product X, it can be stated with 95% confidence that the product X is used by 50% +/- 3.1% (i.e. 46.9%-53.1%).

		95% confidence level			99% confidence level		
% Response:		10%;90%	25%;75%	50%	10%;90%	25%;75%	50%
Sample size	50	+/- 8.3%	+/-12.0%	+/-13.9%	+/-10.9%	+/-15.7%	+/-18.2%
(n)	100	+/- 5.9%	+/- 8.5%	+/- 9.8%	+/- 7.7%	+/- 11.1%	+/- 12.9%
	200	+/- 4.2%	+/- 6.0%	+/- 6.9%	+/- 5.3%	+/- 7.9%	+/- 9.1%
	400	+/- 2.9%	+/- 4.3%	+/- 4.9%	+/- 3.9%	+/- 5.6%	+/- 6.4%
	1000	+/- 1.8%	+/- 2.7%	+/- 3.1%	+/- 2.4%	+/- 3.5%	+/- 4.1%

For calculating other sample sizes and responses, formulae are:

$$1.96 \times \sqrt{\frac{x(100-x)}{N}} \quad (1:20)$$

$$2.57 \times \sqrt{\frac{x(100-x)}{N}} \quad (1:100)$$

Significance testing- Paired Comparisons

For 2 answers to be significantly different, the difference must be greater than the % shown below. For example, with a sample of 1000, if 2 answers are more than 6.2% different, it can be said with 95% confidence that the difference is significant (i.e. not due to chance).

Sample size (n)	95% confidence level	99% confidence level
50	27.8%	36.3%
100	19.6%	25.7%
200	13.9%	18.2%
400	9.8%	12.8%
1000	6.2%	8.1%

For calculating other sample sizes and responses, formulae are:

Formula P=0.05: $\frac{196}{\sqrt{N}}$

P=0.01: $\frac{257}{\sqrt{N}}$