

Meeting the patients

Caroline Jameson, managing director, Healthcare Research Worldwide



So who are these 'patients' that everyone's talking about? UK agency Healthcare Research Worldwide (HRW) has gone some way to finding out with its work on patient compliance – or rather non-compliance.

The firm began looking into the issue in 2005 having heard much talk about the compliance issue, but seen little action to address it. Caroline Jameson says: "People are choosing consciously or subconsciously not to follow a treatment regimen. It's one of those thorny subjects that everybody is aware is a big issue, but pharma companies don't know where to start doing anything about."

The results of their segmentation work, published in *Research*, generated more interest, leading to further analysis of the findings. "We found that you can segment the whole population, but when you break it down, the

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condition that somebody's suffering from significantly alters their attitude towards taking the medication."

Jameson sees a clear commercial imperative for turning the spotlight on patients.

"Pharma companies' pipelines are smaller than they were a few years ago," she says. "They're needing to look at how they can improve return on investment and make the most of the products they have. If the patient isn't taken into consideration even at the very early stages, you're less likely to get the buy-in in terms of treatment. They also want products that are going to drive some sort of patient loyalty."

Add to this the fact that patients are better informed and more independent than ever. "There's the whole idea that people should take more responsibility for managing their own health. So let's understand what's going to help people manage their own health better."

"It gives firms another avenue to explore. It's another opportunity to increase brand security and drive brand loyalty."

Rising to the challenge

Jeff Kozloff, founder and president, Verilogue



Engaging with patients directly is easier said than done. But technology can offer some ways forward. Jeff Kozloff expects to see more research companies innovating to find new ways to learn from patients.

A seasoned healthcare researcher, Kozloff set up Verilogue after becoming frustrated with always relying on recall data. The young firm's system monitors physician-patient conversations and makes them

available, in anonymous form, to companies in the healthcare space. He believes technology will drive an explosion in this kind of real-time data collection.

"Our industry has done a great job in getting behavioural data about our customers," he says. "We've

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moved from getting physician level data to getting longitudinal patient level data, and that's great, but at an attitudinal level we haven't made many advances. Methodologies like this really give that insight into how patients are diagnosed and initiated on treatment. It's not enough to ask people after the fact – we're going to see a real shift from recall data to real-time data collection.

With traditional observation methods posing all sorts of thorny problems in the pharmaceutical arena, Kozloff believes technology will play a crucial role. "Behavioural researchers have used technology and databases to evolve rapidly, and I think you're going to see attitudinal companies do that as well. One of the fundamentals of marketing research is that you need to listen to your customers, ideally in their natural environment. So you're going to see more firms innovate to try to capture customers in that environment."

Kozloff says conversations in doctors' offices are "the most important event in the cycle of disease management". Verilogue has even trademarked the phrase 'point of practice', to mirror the point of purchase that consumer researchers spend so much time worrying about.

"This is one piece of the puzzle. You can follow up and probe it with more traditional research means," he says. "It makes the research that people do more effective because they know now which questions to ask."

Removing the obstacles

Jonathan Carson, president, international, Nielsen Online



Jonathan Carson believes Web 2.0 is revolutionising the strictly regulated world of pharma research, by allowing clients to listen to what patients are saying. But regulators still need to catch up.

"Consumer-generated media (CGM) was a breakthrough," says Carson. "Things that a technology or FMCG company would take for granted, a pharmaceutical company is prevented from doing because they're so heavily regulated in the types of interactions and relations they can have with consumers. So the fact that there are tens of thousands of their customers online sharing their viewpoints and experiences is extremely compelling to them."

Necessity is the mother of invention, and when Carson's CGM-tracking firm BuzzMetrics was starting →