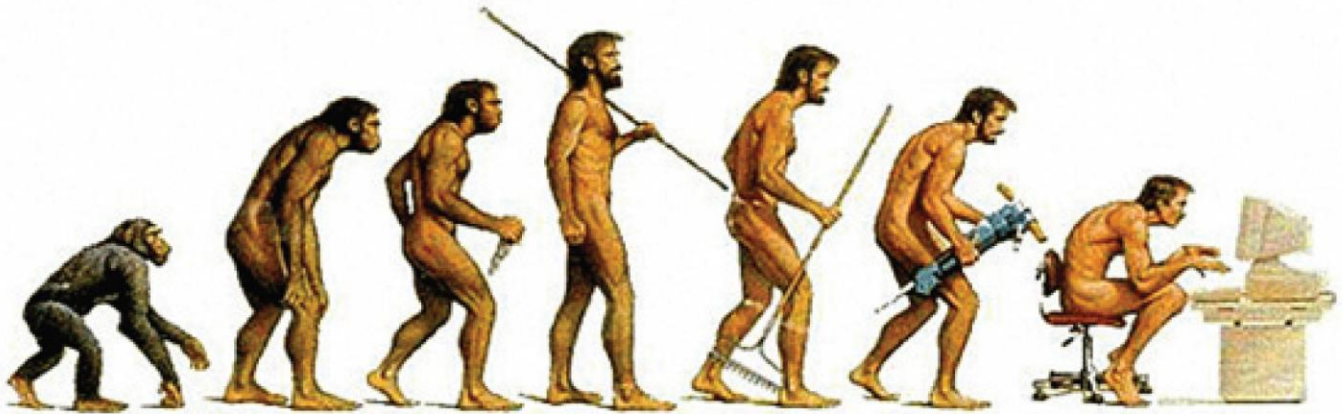


A Tracking Evolution



Real-Time Market Tracking Eliminates Clinic-To-Client Delay

by Tim Robinson, Director, Therapy KnowlEdge
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In this bicentenary year of the publication of Charles Darwin's seminal work on natural selection *The Origin of Species*, Tim Robinson casts an eye over the changing face of tracking research in the pharmaceutical marketplace. He looks at the latest manifestation of tracking that is now available to brand managers and market researchers, and he asks—what developmental steps are next?

Tracking programs have always played a vital role in the marketing intelligence mix, and are a central element of any successful market research system. Tracking research can take a variety of forms, but ultimately the key performance indicators upon which they report provide the foundations that help guide marketing decision-making. Having a clear and consistent stream of independent market information is essential business practice for everybody involved in pharmaceutical marketing, from in-line product managers, in their task of shepherding their brand to greater success in a crowded marketplace, to new product launch managers, in refining their understanding of competitive propositions, brand opportunities and in crafting a compelling call-to-action.

But I want to ask, "Where did tracking research begin and how has it adapted over time? What is the likely future evolution of this type of research and how will it change the face of market research?"

The Evolutionary Journey...

One of the earliest pioneers of medical tracking research was Florence Nightingale, whose work had a huge influence on healthcare reform in the late 19th and early 20th centuries. Using her background as a statistician, she began to gather

methodical tracking data on her patients in a way that had never been done before. She even presented her findings graphically in order to enable broader audiences to understand statistical information (although this provoked criticism from academics who believed statistics had to be dry in order for them to be credible). Her approach is one we can still learn from today, since helping marketing teams to engage with data by presenting it in a form that enables them to quickly understand and act on it, only increases its value.

It wasn't until the 1970s and the birth of the computer that commercial market research and tracking market research really started to take off. And as demand grew, the pharma industry, like other commercial sectors, began to commission research agencies as specialists to design, manage and maintain their tracking systems. Increasingly, more and more research was outsourced as independent agencies could dedicate resources to develop methodologies beyond the time constraints of the in-house analyst. The agency expert was relied upon to deliver robust data based on rigorous sampling, meticulous data collection, expertise in questionnaire design and statistical analysis. Market research has always been shaped by technology and so the rise of the telephone and the introduction of CATI (Computer Assisted Telephone Interviewing) became a popular methodology for tracking programmes.

And now as we enter the digital age, so the Internet, mobile technology and other technologies continue to shape how tracking research evolves. The original skills required for carrying out robust tracking research are still expected of the market research agency, but they are not enough to completely satisfy the pharma industry's need for immediate, insightful information that gives a clear picture of the market landscape. The days of generating and analysing huge tables of data manually are behind us (thankfully). The internet has been fully embraced as a methodology, but we need to look at what more technology can offer in terms of delivering real insight, as the pharma industry will come to expect it.

One of the mainstays of tracking information required in the pharmaceutical sector is the detail of the prescription event itself. 'Patient record audits' or 'diary studies', typically take the shape of a pre-determined data collection form that is then completed by all the respondents to record, for example, patient demographic information, prescription details, reasons that motivated the medical professional to prescribe this particular product and the desired/observed outcomes.

Historically, diary studies have employed the tried and tested 'pen & paper' collection method so that the physician is able to record the information of the event at the time it took place (rather than later from memory recall). This remains a solid and reliable methodology but it can be very slow as it involves sending out diaries which need to be collected, scanned or punched and coded, and then analysed. Often reporting to the client takes place months after the events were recorded.

Probably the two most used alternatives have been collection by way of an in-person interview (though more expensive) or through use of a telephone-assisted interview (though potentially less detailed). For many years, these collection techniques were the 'gold standard' for diary studies; however, they fail to harness the very real benefits offered by new technologies.

Moving Into The Digital Age

Since the introduction of electronic data collection almost all tracking programs have now made some level of digital transition. At the data collection end, CATI has helped automate and analyse data much more quickly and accurately, as has scanning capture of paper-based records and conversion of hand-written prescription text into coded data (using tools such as Ascribe). The interview can now be carried out entirely online, which eliminates geographical barriers whilst allowing the respondent the flexibility to complete the questionnaire when they desire. Unknown to them, the interviewee can be guided through complex routing without distraction, allowing for much more sophisticated questionnaire design. Undertaking analysis has also been made much easier using computer modelling tools and reporting has been much improved with the adoption of charting packages such as Microsoft's PowerPoint and Excel, and Apple's Keynote.

But is this going far enough? Now 'with a computer in every home' (thanks Bill), I wonder if we should be thinking about

how to integrate these tools in a way that delivers seamless transition of information from point of input to the point of insight. In this way, tracking programmes can be given the ultimate digital makeover and transform how data can be embraced by end-users.

An example of how technology can be harnessed to improve the tracking research process is illustrated by the syndicated product I manage called Therapy KnowlEdge. The traditional pen and paper diary method has been replaced by the internet, which enables data to be entered, collated, analysed and reported online. Panels of recruited specialists are able to update their patient records online immediately after the consultation has taken place. A backend system then takes the data and is able to turn it into a comprehensive range of different graphical reports, all of which are interactive and immediately accessible to subscribers online, in real-time. The recipient can view, dissect and explore the information however they wish, getting the answers they want quickly and without the need for an intermediary party.

This method improves the speed of data collection, gives greater control of data integrity and provides very powerful instantaneous and interactive chart analysis. Removing the clinic-to-client delay offers a new level of immersion in the market.

Similarly, other tools use mobile devices as a data collection tool to allow market researchers to get even closer to the customer—making use of technology in a way that is ideal in fast-changing, dynamic markets, where tracking at point of sale is beneficial. For example, if a brand manager wishes to evaluate the success of a marketing campaign over time, they can employ mobile collection technology to gather feedback on all the instances when the respondent came into contact with that brand and find out how messages were received, immediately, as they happen. This has obvious utility in the consumer sector, but can also apply to the pharma industry where stakeholders come into regular contact with pharmaceutical brands, whether online, in printed material, or verbally from a sales rep or in conversation with another peer. Access to this type of technology to record the real-time interaction, perception and response can be much more accurate than forcing recall at a later point in time in a face-to-face location far removed from the actual event.

Serving Global, Matrix Teams

Global pharmaceutical companies have a presence in almost all of the markets in which they sell medicines, and therefore balancing the strategic intentions filtering down from the global level with the tactical needs of the teams locally can really be helped by maintaining clear channels of communication. Universal access to up-to-the-minute data on all the key tracking metrics, with intuitive reporting systems serving all hierarchies within the matrix team ensures seamless information flow. In the same way as digital collection methodologies boost accuracy and flexibility of collection, the same technology is being used to disseminate the research findings.

With all levels of the brand team on the same page when it comes to understanding their market, all able to remain fully

informed of market changes and developments, and all having the opportunity to cross-analyse performances across other markets, tracking has evolved to meet the demands of the geographically and time-zone dispersed brand management team.

Real-Time Data Interrogation

Harnessing the power and accessibility of online data collection and reporting makes for a much more powerful, responsive tracking system. With this comes the need to collect more data, and on a more frequent basis to ensure that there is sufficient data to interrogate. In markets such as autoimmunity and infectious diseases in particular there has been a growth in high-end medications that provide a real-step change in outcomes for the patients, and enable high prices to be charged. They are attractive markets that have not gone unnoticed by the pharmaceutical companies, and on the back of two decades of advances in molecular biology, a wide array of products have launched or are about to join these markets. Now with the power of a real-time view of the market and the rapidly evolving competitive landscapes, the pace of understanding has moved up a gear.

In The Future?

Crystal ball gazing is a notoriously unreliable pursuit, especially in our modern times of exponential technological progress where by standing still you're actually going backwards. That said, there are a few trends and opportunities that have the power to make a huge impact on pharmaceutical market research in general and tracking programmes in particular, and so it would be worth considering these here:

- The increasing adoption of electronic medical records is an obvious and ongoing logical extension to the data currently available in claims databases. Making full use of the millions of moments-of-truth for the brand that occur on a daily, if not hourly basis, will provide an immensely powerful uplift in the amount of sophisticated analysis that can be performed. Clearly all data will have to be manipulated on a totally anonymized basis, but the vastly expanded data pool will increase analysis robustness on low-incidence segments, facilitating a move towards echoing the tailored,

personal marketing approaches that we now see emerging across sectors. Institutions that have access to electronic medical record data will attest not only to the power of this facility, but also to the current variability in the set-up of data capture fields, and the resultant barriers to integration (not to mention the flames of privacy fears fanned by the media). Nevertheless I anticipate that we will see more of these types of databases becoming available, with the high likelihood that independent medical associations and physician society bodies will be the most suitable to moderate them.

- Total immersion portals that provide a 360-degree picture of the marketplace by collecting, collating and reporting treatment event information, healthcare professional and patient perspectives, experiences and outcomes, and competitive brand information. These holistic overview portals would draw on multiple sources of research (covering both external data such as tracking data, ethnographic research and perceptions research, plus internal data from sales forecasts and pipeline analysis), and bring them together to immerse the brand teams in all of the data that they need in one place. I anticipate that this would take data integration to a whole new level, and further help pharma to better utilise the mountains of data they hold in their archives.

It's clear that many compatible technologies are converging to allow for unprecedented levels of data access and processing power arriving in the hands of the brand teams— Teams that are increasingly pushed to deliver better insights on lower budgets and in less time can now do more though harnessing technological integration. Tracking programmes such as Therapy KnowlEdge demonstrate the evolution of what is possible, and this analytical power is already in your hands.

Technological progress, coupled with the relentless global expansion of the online 'always-on' world means that it will become even easier to share instantaneous real-time with colleagues and collaborators all around the world. With the benefits of clarity and transparency of information. New ideas can be created and adopted across a fully data-integrated global team and new levels of success reached. ☺

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Upcoming Meetings and Events

- September 14, 2009—PBIRG Fall Education Workshop & Industry Networking Event—Marriott Hotel, Bridgewater, NJ Register on-line
- November 2009—PBIRG Education Workshop & Industry Networking Event
- January 2010—PBIRG Spring Education Workshop & Industry Networking Event
- 2010 AGM May 16-19, 2010—The Naples Grande Resort, Naples Florida