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A Thought Paper on Fostering Greater Utilization of Social and Behavioural Research in The Development Setting and Creating Impact

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About This Paper

The need for well-directed market research has never been so important. This paper explores the ways market research can be a relevant tool, in order to optimise public health goals.

Foreward by Joe Romano, NWJ Group

Developing safe and efficacious pharmaceutical products for global public health indications is no small task. A prime example is the monumental effort to develop and launch products for the prevention of HIV infection. To date, oral Truvada (Gilead Sciences) is the only product approved for HIV prevention, however its impact potential on the epidemic remains unknown. Significant effort has gone into a number of microbicide products for HIV prevention but so far none have reached the target markets. As challenging as the many technical elements of such a product are, perhaps even more significant are the challenges on the market side of HIV prevention. Several microbicide products have been advanced, only to face significant barriers at phase 3 trials due to a lack of adherence. These challenges involving product end users (and the broader context of their lives) are not unique to HIV prevention, and are equally relevant to other product development efforts for people in such settings

Although acceptability and behavioral studies of target populations have proven informative, too frequently they do not adequately address the issues of product acceptability, adherence, uptake and sustained use. Thus, it needs to be recognized that alternative approaches to understanding the end user populations and the broader details of their lives, are critical. To that end, the public health field must move beyond scholarly approaches to these complicated issues, and initiate robust efforts to study the actual **market drivers** that are essential to successfully impacting unmet medical needs, particularly in more resource constrained parts of the world. In this thought-provoking paper, Moushira El-Sahn, Jeff Lucas and Stephen Goodwin establish the necessity for comprehensive market based study of at-risk populations and their environments. They outline the logic for, and mechanics of proper market studies, and how findings from such efforts are essential to product success, starting with initial product design. In the case of HIV prevention, the field can benefit greatly from serious consideration of the principles and strategies outlined here, hopefully in time to achieve impactful products for those who need them most.

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Creating Impact & Maximising Investment

Complex research campaigns precede tightly orchestrated, erudite marketing campaigns in order to optimise the ever-reducing differences between Product A and Product B. Good marketing is now vital and this is the case within the public health arena and pertinently so, sufficient resources must be used effectively to ensure that new products are not only efficacious in clinical trials, but effective in the real-world setting.

This means we need research to ensure our new products or services are acceptable to end-users and other key stakeholders.

Thus ... understanding the end user, the system whereby products will be introduced (including the dynamic healthcare-commercial landscape) is critical to ensuring maximum impact and best return on investment. This is as true for products in the early stages of development as it is products close to introduction or post-launch.

Social and public health research is a critical part of this dynamic setting – and while scientific innovation can provide great tools, they must all be checked against the everyday needs, lives and systems already *in situ*.

Fostering greater utilisation of social and behavioural research in the development setting

In order to understand current behaviours, relevant research studies should operate alongside the development of a product as a critical part of the whole process.

Social and behavioural research techniques and solutions are designed to get to the heart of the market-critical questions. They include many fundamental ways in which we can understand the differing perspectives of various relevant stakeholders:

- What are they doing now? Why?
- What do they need? Why? Where?
- How do they evaluate new products/services? Why?
- What challenges do their systems or processes face?
- Where do they feel the need for innovation? Why?
- What do they see as the opportunity(ies)? Why?

Utilising relevant social & behavioural research programmes - from early stage development to product launch and follow up

The essential role of market research is to support decision-making processes. Appropriately designed research gathers understanding and data about a product or service from relevant stakeholders. This will significantly reduce risk at any decision-making 'milestones'. It also keeps product or service support programmes relevant, fresh, focused, future-orientated and geared to optimal investment return.

Appropriate social and behavioural research is used across the whole healthcare industry spectrum to support decisions across all the stages of the lifecycle of a drug, device, brand or healthcare service, notably decisions about how, whether and where to launch right through to the vital post-launch tracking and monitoring (measuring, for example, compliance, message recall or quality assessment).

A summary of some of the more popular types of research, tied to different phases of a product's development cycle, are shown in Table 1 below.

Table 1: Example of different research study types during a product lifecycle

Phase I	Phase II	Phase III	Pre-launch	Post launch
<p>Ideation and Idea Testing</p> <p>Landscaping and Market Orientation</p> <p>Desk Research and Literature Reviews</p> <p>Stakeholder perception Study</p> <p>End-User Research – value proposition</p> <p>Journey and Behavioural Research</p>	<p>Landscape Analysis & current channels used</p> <p>Consumer analysis</p> <p>Stakeholder perception Study</p> <p>Early Stage Concept Test</p> <p>Stakeholder Mapping</p> <p>Scientific Leader Research</p>	<p>Patient/end user Journey</p> <p>Customer Segmentation</p> <p>Routes to commercialization & sector channels</p> <p>Forecasting</p> <p>Patient/end user Journey</p> <p>Customer Segmentation</p>	<p>'Co-creation' Concept Testing</p> <p>Customer Drivers</p> <p>Pre-Launch Attitudes and Usage</p> <p>Price Sensitivity</p> <p>Concept Testing</p> <p>Key Opinion Leader Mapping/ Understanding</p> <p>Positioning</p> <p>Adherence understanding</p> <p>Profile testing</p>	<p>Customer Satisfaction</p> <p>Post Launch Attitudes and Usage</p> <p>Compliance/ Adherence Understanding</p> <p>Message Recall</p> <p>Forecasting</p> <p>Monitoring and Evaluation</p>

Critical learnings from our experience in market research and public health

There are a number of features about carrying out research which we as practitioners feel need special emphasis. These learnings have important implications on doing public health research and work in developing countries.

1. **Researching innovation should be a continuous process:** There is a risk that organisations or companies, even those familiar with the innovation process, may see a particular product or service as 'finished'. This is a self-fulfilling prophecy and rarely the case; the most successful organisations are in virtually continuous innovation mode, every project or study is seen as an opportunity to refine and improve. All feedback, and especially research which provides feedback from directly affected users/stakeholders, should include an element of *'how can this help us improve our product/service?'*

As a footnote, it is interesting that a common reaction to this continuous innovation concept is that this aim incurs unnecessary costs or adds an unacceptable time resources burden. Research has consistently proved this not to be the case; continuous refinement is far less expensive and thus more efficient than either having to replace an obsolete product that is not relevant to its end user or defend the market share/ position of one that has fallen behind its competition.

2. **Understand your market:** is so frequently mentioned that it is surprising that so many organisations seem to forget it; however, the most frequent offences, i.e. making inappropriate judgments or extrapolations from one market to another and making decisions based on un-proven market assumptions, are often committed by sophisticated marketing operations.

So the two most critical rules associated with this need for market understanding are probably;

- Always cover all potential stakeholders in your research programme, remembering that even partially-implicated groups can make a vital difference; and
- Build your marketing concepts around your stakeholders' and their insights; the most potent are usually unmet needs and typical behaviour patterns.

3. **Test ideas surrounding the product as well as the product itself:** Our third learning is subtler than our first two, not immediately, perhaps, so obvious. Even when you are testing a product or service. For example, while a survey goal might be to evaluate the usefulness of a vaginal ring, a good researcher would also ensure their programme tests the context of where, when and how it might be used, who would buy, recommend and endorse it, what the product should look like, how it might be most suitably packaged, how would it fit in the women's life regarding her sexual choices, partners, age, motherhood etc. thus exploring the core ideas on their own, even without the impact of concept design or execution.

Here is also where human centered design works to reveal opportunities and barriers, as well as ways in which these can be optimised and addressed via alterations to the design/idea/attributes.

Another part of this same learning is to test several alternative ideas within a single testing situation, even when you/your organisation have a strong favourite. The reasoning for this last advice is that,

even if you are not going to change your product, it is often just as important to appreciate your product's weaknesses as it is to know its strengths.

4. **Don't just evaluate concepts/products – make them stronger.** A far more advanced learning, one that is often overlooked in healthcare particularly, is effectively enlisting stakeholders to make your product better. Especially in the developing world the actual competition may not be obvious and hearing what consumers or specifiers, of your product see as alternative to your product or service can be worth its weight in gold.

This will help you with our fourth learning - This is about product development *and* the 'language' of the product area, for example this would go beyond oral PrEP and extend to their prevention market and further still, wellness. Ensuring that your communications surrounding a product are sympathetic to its users and resonates with its personality is critical to its successful introduction and adoption. Effective stakeholder-focused research studies will expose the reasons to believe in your product, the rationale for its adoption, the language for its advertising and promotion. These insights will enable and support maximal demand generation interventions.

5. **Forecast, forecast and forecast again:** Our penultimate learning is one best embraced by the packaged goods industry. Packaged goods (FMCG) companies are typically rigorous¹ about forecasting and operational research, perhaps because they launch many products, have - and use - many such tools and certainly because avoiding a potential failure may make the difference between success and bankruptcy. Conversely, it is tempting to observe that many so-called failures in the drug world are less about falling short than about an inability of drug company marketers to accept a new agent will not achieve a high market share. Basing your product introduction on anecdotes or feelings or qualitative research is not only risky, it also means you are not making the right decisions for all groups involved from product developers, to distribution networks utilised, to healthcare system impact, to investment from commercial partners - a high forecast will drive Plan A, a lower one must invoke Plan B.
6. **Track & develop your success:** The final learning set evokes the idea that a marketer's work is never done. Whether successful or otherwise. While companies are typically fast to diagnose marketing or product-related problems, strange to say they often 'forget' to find out why their product is doing well. And even when it is, markets change and evolve, competition changes, environments change and constant monitoring and tracking can avoid or at least reduce threatening changes affecting your product or service's success. Tracking demand, monitoring and evaluating product awareness, testing message resonance and utilisation will enable you to propose changes to your product marketing programmes in good time and with proper regard for the stakeholders. Not only will good tracking and monitoring always help sustain your product, it will undoubtedly extend the return on your investment too.

¹ R Fildes, K Nikolopoulos, S F Crone and A A Syntetos. Forecasting and operational research: a review Journal of the Operational Research Society (2008) 59, 1150–1172

These learnings are summarised in Table 2 below.

1. Researching innovation should be a continuous process
2. Understand your market
3. Test ideas surrounding the product as well as the product itself
4. Don't just evaluate concepts/products – make them stronger
5. Forecast, forecast and forecast again
6. Track & develop your success

So what? What are the implications of these learnings?

The premise of this paper is that where the potential contribution of good, effective, timely research is not understood and utilised, both the success of a product launch and the growth of the product or service post-launch can be reduced. Therefore, conversely the development of innovations within public health where informed by intelligently designed market research can be optimised.

Thus, in addition to social and behavioural research as a tool to support decision-making, this research should be planned for at the outset, designed early and subsequently used alongside strategy development including, commercialisation and product introduction and tactical planning as a way to address and answer critical market and product-related questions.

Incorporating market research programmes as early on as possible, and throughout the development of products is critical. This can mean even before a product conceptualised, perhaps it is just several ideas, or discovering what critical populations do, want and how they behave can critically inform ideas and concepts. Furthermore, developing an appreciation for the landscape, the healthcare system, and environment can again reveal salient opportunities and barriers, which can inform idea/concept/product development. These sorts of research programmes should be done throughout the product development, acting as a check on the product's path and furthermore, ensuring its design is optimised.

The action-ability or usability of your research will depend on employing the correct approaches or solutions; also ensuring that the appropriate research outcomes are incorporated into your company or organisation's thinking and planning. Being clear on what you need to know, and what the research can reveal will enable proper design and meaningful results.

Ideally, using a professional and experienced research agency as a partner – working together to deliver action and decisions - is the most reliable way of ensuring your research programme is properly designed, executed and delivered. Ensuring interventions in public health are optimised will in part, need strong understanding of all the relevant moving parts and stakeholders from the end user, product developers, to funders, Non-Governmental Organisations (NGOs), commercial groups, advocacy groups, communities' representations through governments, and this can be done through market research techniques and solutions.

Thank You & Contact



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