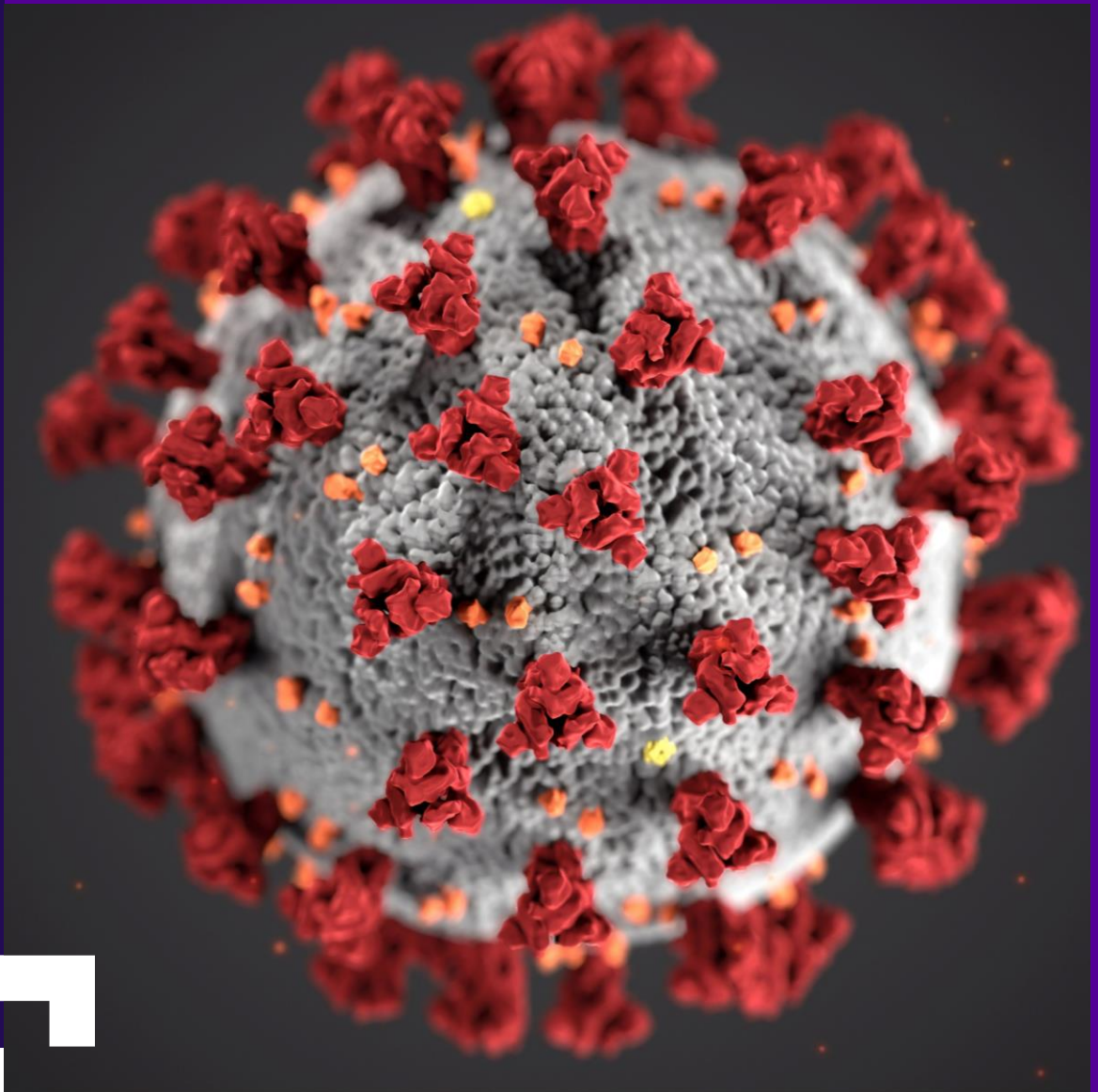


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COVID-19 Healthcare Market Research Update

Issue 2 | Week of March 16, 2020





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COVID-19 HEALTHCARE MARKET RESEARCH UPDATE

Week of March 16, 2020

AUTHOR: KATY PALMER, PHD, EVP, MANAGING DIRECTOR

In reflecting on our first newsletter just one week ago, things have certainly changed. Across the globe, people are experiencing broad closures of the events that make up our lives, including primary schools, colleges, sporting events, Broadway and Disney, bars and restaurants. Many of us are learning to work from home.

In the world of healthcare research and consulting, our clients are taking key actions to address the situation head on:

- Amarin, a biotech with a game-changing FDA approval in-hand, has shown leadership by sidelining their field reps until March 30. This action was based on WHO social distancing guidance meant to protect employees.
- Big pharma companies are pausing patient and HCP research for specific brands and for hard-hit countries.
- Many US health systems are requesting that all marketing, market research and sales activities cease unless there is *true value* to supporting the current environment. Click [here](#) to read one viewpoint.

We hope that you will enjoy this second edition of our newsletter. Things are changing rapidly, and our goal is to provide you will information and resources to help you keep pace and adapt.

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Global Markets Update

AUTHORS: BETH CAREY & CHERYL PFAFFMANN, RESEARCH MANAGEMENT

As COVID-19 spreads globally, we are seeing widespread shifting to virtual modalities for qualitative interviews and sensitivity to conducting HCP interviews in markets with strains on their medical systems.

Specific to the US population, B2B telephone surveys are experiencing slight drops in performance as the workforce adjusts to work closures and tele work. These studies may require an extended field window. In contrast, US general consumer telephone field performance has improved.

	Change vs. Last Week	Face-to-Face Qualitative	Phone/Web Qualitative	Quantitative Response Rates (RR)	Country Status
USA	▼	Limited	Yes	Normal	State of emergency, entry bans, social distancing varies by state
CAN	▼	Yes	Yes	Normal	Entry bans, social distancing varies by province
DE	▼	Limited	Yes	Normal	Entry bans, social distancing varies by state
ESP	▼	No	Patients only	Normal	State of alarm, lock-down, stressed medical services
FR	▼	No	Limited	Normal	Lock-down, proof of need required for local travel
ITALY	■	No	Patients only	Normal	Lock-down, proof of need required for local travel, significantly strained medical services
JAPAN	■	HCPs: Limited Patients: No	Yes	Normal	Entry bans, social distancing
CHI	■	No	Yes	HCPs: Lower RR, add 1-2 weeks to field	Entry bans/quarantines, citizens returning to work in offices

Fieldwork capability: ▼ Worsening ▲ Improving ■ Similar to last week

Source: [Travel.State.Gov](https://www.travel.state.gov)

Pivoting from Face-to-Face to Digital Qualitative

AUTHORS: LAURA HOLZEM, DIRECTOR
AND BETH THOMPSON, SENIOR RESEARCH DIRECTOR

Although in-person interviews are currently not an option for many studies, market research doesn't have to slow down. Here are five virtual options worth leveraging during the COVID-19 quarantine.



Standard Telephone Interviews

BEST FOR: Studies with no stimuli, low budgets, tight timelines or quick follow-up interviews

PROS: Lower cost compared to in-person and other virtual methodologies; "live" discussion; ability to probe in-depth

CONS: Inability to "see" respondent, scheduling can be labor-intensive, and subject to frequent reschedules



Web-Assisted TDIs

BEST FOR: Studies with stimuli; team and client engagement needed (backend questions)

PROS: Ability to see respondents and share stimulus on screen; "live" discussion and the ability to probe in-depth; depending on platform, the ability for team interaction in backroom

CONS: Some respondents may be uncomfortable using a computer or unwilling to use web-cams; subject to tech issues; scheduling can be labor-intensive and subject to change



Online Focus Groups

BEST FOR: Studies geared around ideation; exploration; co-creation

PROS: "Live" group discussion at set time and date; ability to probe in-depth respondents in comfort of own home; ability to "see" respondents expression and share stimuli

CONS: Smaller number of respondents recommended (six or fewer); some respondents may be uncomfortable using a computer or web-cams; subject to tech issues at times



Online Bulletin Boards

BEST FOR: Studies in which you want to study behavior over time (diary), for difficult to schedule/find respondents who benefit from asynchronous nature of board, or with high engagement topics

PROS: Allows qual data collection from larger sample; asynchronous, so convenient for respondents; capacity for multiple question types on platforms, including multi-media; ability to collect individual and group responses as well as share stimuli

CONS: Respondent participation and depth of responses can be uneven; labor-intensive moderation/analysis; reduced ability for in-depth probing; one week needed for programming and testing



Mobile Ethnography

BEST FOR: Studies exploring "in the moment" behavior or respondents in their "natural settings"

PROS: Ability to capture "in-the-moment" data in natural environment; ability to see respondents, asynchronous for convenience; answers can be submitted via photos, videos, text or audio

CONS: Relies on respondents' cooperation, reduced ability for in-depth probing; stimuli viewed on phone can be small and hard to read; often needs one week for programming



Stories That Move People and Business

AUTHOR: DAWN PALACE, PHD, SVP

It's true, we are at our best when things are at their worst. I'm humbled by the speed of human ingenuity, caring and sharing during the COVID-19 outbreak. Actions small and large have made me smile, such as the Italian man in this picture, who created a social distancing donut to support safe grocery shopping. As you navigate the outbreak at work and at home, I hope you'll find the links below useful and uplifting.



Source: Fox News. Click [here](#) to read the article

Market Research



Coronavirus: Physician and Patient Perspectives

M3 Global Research, a panel provider, [reported increasing HCP confidence](#) in government preparedness to handle the outbreak.



KFF USA Coronavirus Poll

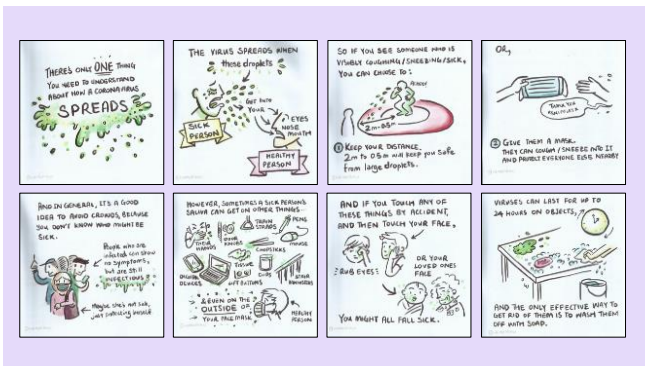
A Kaiser Family Foundation [Coronavirus Poll](#) reported that about one-third of US adults say that worry and stress related to COVID-19 has had a negative impact on their mental health, with 14% reporting a “major” mental health impact. This suggests researchers should consider the impact of negative effect on survey responses during the outbreak.

Inspiration



Infocomics: Protecting Yourself and Separating COVID-19 Fact from Fiction

Singapore artist Weiman Kow's infocomics arm families with COVID-19 understanding and preventive strategies. Her comics can be [downloaded free-of-charge](#), either in full color or as a coloring book.



We've got this!

Our creative team of health-focused experts understands your needs and are at-the-ready with tried-and-true alternatives to in-person research, meetings and workshops. And we have innovative ideas, too! We'd love to be an extension of your team for ideation, consultation and action planning as you continue to put patients first during the COVID-19 outbreak.



Talk to us

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About Escalent

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