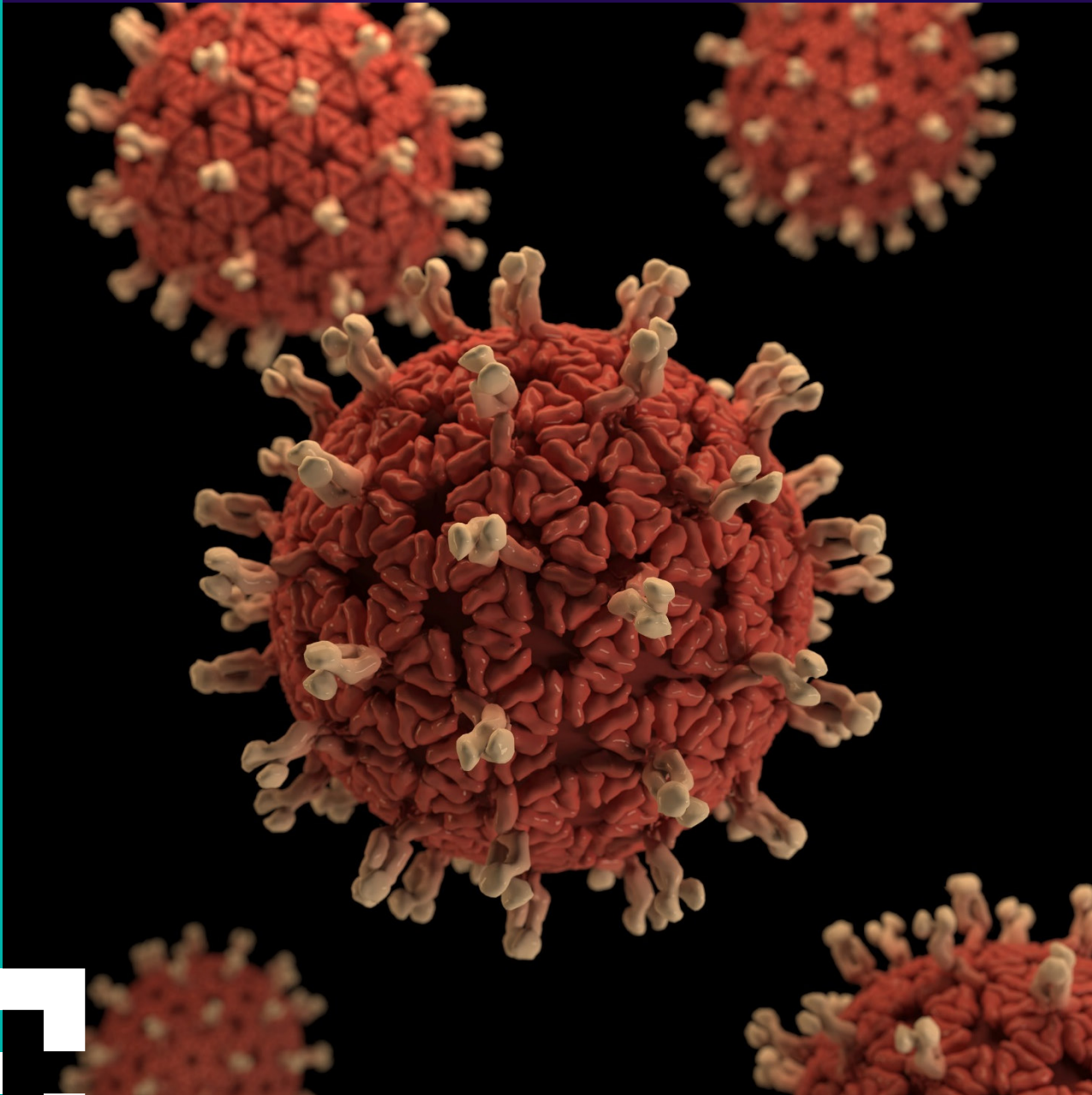
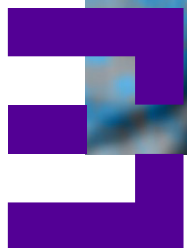
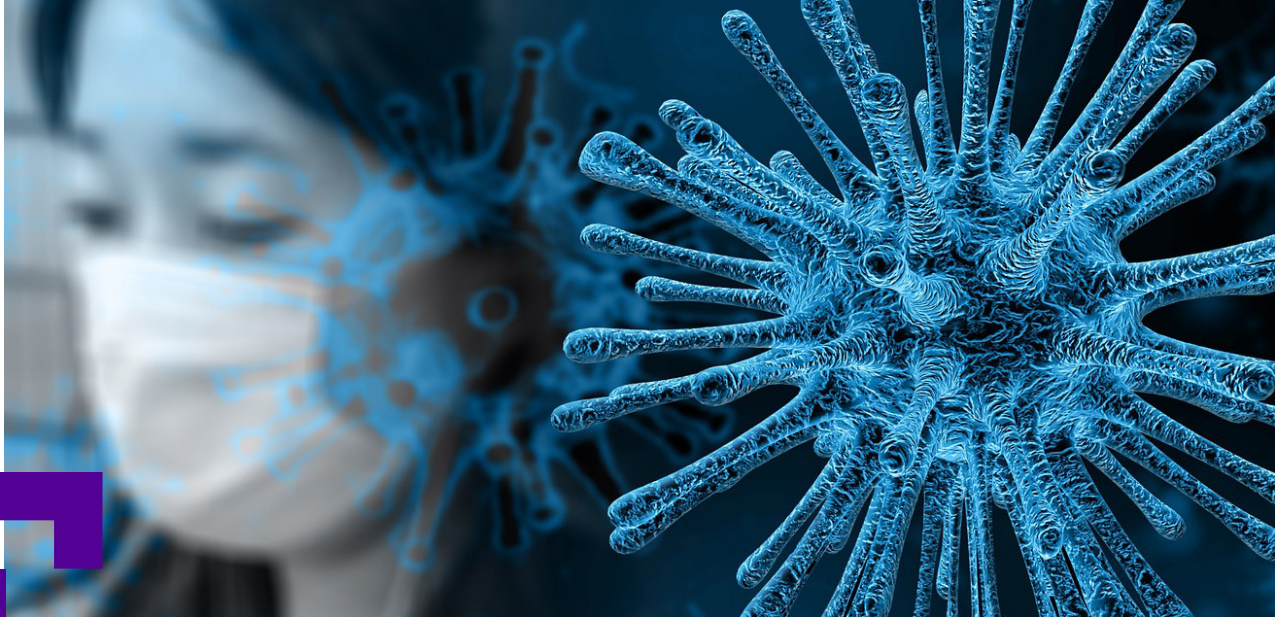


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# COVID-19 Market Research Update

Week of March 9, 2020





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## COVID-19 MARKET RESEARCH UPDATE

Week of March 9, 2020

The Coronavirus is a major global event that will undoubtedly impact your personal life, as well as the research you conduct with patients, HCPs, and Health executives.

To assist our Health clients during the outbreak, Escalent is initiating a regular newsletter with information, learning and ideas to help you pivot to local realities at home in America and in major global markets.

This is the first newsletter in our series.

### In this issue:

- 1 Adapting Qual Research:** Leaning in to put patients first and keep business moving amid COVID-19 concerns
- 2 Global markets:** Updates from feet-on-the ground in Europe and Asia
- 3 Brand Impact:** Managing the health of your health brand during the COVID-19 outbreak

# Adapting Qual Research Amid COVID-19 Concerns

AUTHOR: LIZ GEORGE, SENIOR MODERATOR

With the emergence of COVID-19, our Escalent [Health](#) team converged to discuss the key needs and priorities for how we would handle the developing travel restrictions and fielding challenges that would emerge if the situation escalated.

## Patients First

The priority for every team member was simple and unanimous: **We will not put patients at risk.** No research objective outweighs patients' safety.

In collaboration with our clients, we are taking action to limit the need for patients to travel (even locally) for in-person qualitative research, and even limiting in-person health care provider (HCP) research to reduce unnecessary exposure for providers that may serve these at-risk populations.

## Leveraging Qual Technology

Many markets are prepared for virtual qualitative tools. For those less prepared, these circumstances present a unique opportunity to demonstrate their value and explore larger-scale feasibility. We are currently transitioning projects planned for in-person research to a combination of online discussion boards and webcam interviews, and working with our international partners to recruit appropriately, educate respondents and refine our engagement strategies to maximize completions.

## Evolving the Debrief

For our client teams that thrive on live, backroom discussion, it is difficult to imagine the same immersion in global research without the “boots on the ground” element. We've opted to take many of the same engagement strategies that keep our remote teams connected and use them to help our clients stay connected to the research. From simple tactics like carefully scheduled calls (to address conflicting time zones) to creative options like using asynchronous online boards and virtual whiteboard workshoping tools (to allow teams to post questions, collaborate on stimuli updates and share their learning), we are working closely with client teams, translators and inter-national moderators to bring global research insights home.

## Moving Forward

As we work to keep research efforts moving, COVID-19 raises an important reminder for the healthcare research industry specifically. We, alongside our clients, are committed to patient centricity and keeping patients' needs at the forefront of our thinking. While qualitative research helps us to deeply understand patients' lives, we must ensure that our research design, practices and logistics always serve patients first. On the average day, this is important out of respect for their time and effort—but in the midst of a health crisis, it is essential for their safety and well-being.

*This article contains excerpts from Escalent Health moderator Liz George's blog of the same title. Click [here](#) to read the blog in its entirety*





# Global markets

AUTHORS: BETH CAREY & CHERYL PFAFFMANN,  
RESEARCH MANAGEMENT

The situation across countries is fluid this week, with evolving COVID-19 quarantines and US corporate travel bans impacting face-to-face research and workshoping to varying degrees.



Click [here](#) to get the latest updates on Coronavirus containment and outcomes.



## Spain

**QUARANTINE STATUS:** No restrictions; however, Madrid saw a spike in cases this week and is beginning to close schools.

**MR TODAY:** Research is running normally in Barcelona and Madrid. They are beginning to see in-person groups shift to virtual modes. They are avoiding studies with Infectious Disease Specialists and Pulmonologists.

**MR OUTLOOK:** They recommend a shift to web or telephone interviews for all respondent types in anticipation of increased disease activity.



## Italy

**QUARANTINE STATUS:** This week Italy recorded the highest single daily death toll from COVID-19. Life is highly disrupted, with a country-wide quarantine in effect.

**MR TODAY:** Market researchers are working from home via web and telephone modalities.

**MR OUTLOOK:** No in-person research, sensitivity and patience needed for scheduled research.



## Germany

**QUARANTINE STATUS:** No restrictions.

**MR TODAY:** Face-to-face interviews continue to occur on a limited basis. Research is shifting toward digital/telephone modalities driven by US companies with implemented travel bans.

**MR OUTLOOK:** Things are changing on a daily basis. Quarantine in Berlin is anticipated in the coming weeks.



## Japan

**QUARANTINE STATUS:** No restrictions.

**MR TODAY:** Researchers continue to travel to work in-facility, face-to-face with HCPs. However, web assisted telephone interviews are now the primary modality, especially for patients.

**MR OUTLOOK:** Change is expected, with an announcement anticipated after March 13 when the government will vote on a revision to their influenza bill, with special measures for Coronavirus.



## China

**QUARANTINE STATUS:** Each person has a health code (red, yellow, green). Those with a green codes may move freely and attend face-to-face activities. Yellow are quarantined for 7 days, red for 14 days. Some researchers returned to working in their offices on Monday.

**MR TODAY:** Face-to-face research is not forbidden, but remains limited in use.

**MR OUTLOOK:** Because there's a risk that the virus will spread again, the government is encouraging people to work in virtual groups and limit face-to-face gatherings.

# Managing the health of your health brand during the COVID-19 outbreak

AUTHOR: DAWN PALACE, PHD, SVP

COVID-19 has thrust health brands into the spotlight, providing opportunities to demonstrate commitment to patients and expanding popular discussion beyond the cost of drugs and healthcare services.

## Stepping up to Serve Patients

As the COVID-19 virus spreads, healthcare brands are supporting needs in both high profile and grass roots ways. For example:

- Biopharma CEO's met with President Trump and the White House Coronavirus task force to address the outbreak and discuss vaccine development.
- US hospital systems are offering free COVID-19 screenings; setting up hotlines to address people's questions; and offering free e-visits for people to discuss symptoms. A Seattle hospital has set up a drive-through testing clinic in their garage so that symptomatic employees can be tested without putting patients at risk.
- Health insurers also met with the President this week are waiving fees for COVID-19 diagnosis and treatment.

## Managing Concerns

At the same time, concerns are rising over potential supply chain issues for health products and services impacted directly (e.g., sanitizers, face masks, fever reducers, respirators and hospital beds) and indirectly due to productivity losses (e.g., pharmaceutical drugs in general).



## Assessing the Impact

Health brands have jumped in to help contain and prepare for the spread of the virus - a key element in successful crisis management for public welfare. But are those efforts sticky and meaningful to customers?

Now is a good time to consider assessing COVID-19 beliefs and behaviors, awareness of your company's efforts, and impact on brand health. Many efficient vehicles are available, such as:

- A 5- or 10-minute quantitative Pulse survey
- An add-on to your existing tracking instrument
- A quantitative open-end/video survey
- A handful of webcam or telephone interviews

Escalent has lifetimes of experience with crisis surveys and action planning. [Send us a note](#) to collaborate with one of our experienced consultants or strategists.

# 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

Dawn Palace, PhD

P: 313.414.8290

E: [DAWN.PALACE@ESCALENT.CO](mailto:DAWN.PALACE@ESCALENT.CO)

Alex Bonello

P: 734.542.7667

E: [ALEX.BONELLO@ESCALENT.CO](mailto:ALEX.BONELLO@ESCALENT.CO)

## About Escalent

Escalent is a top human behavior and analytics firm specializing in industries facing disruption and business transformation. As catalysts of progress for more than 40 years, we tell stories that transform data and insight into a profound understanding of what drives human beings. And we help businesses turn those drivers into actions that build brands, enhance customer experiences and inspire product innovation.

Visit [escalent.co](https://escalent.co) to see how we are helping shape the brands that are reshaping the world.

