

... pharmaceutical research

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Evolving toward a programmatic approach to pharmaceutical brand launch research

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snapshot

The authors provide a roadmap for programmatic market research to support pharmaceutical brand launches and discuss a diagnostic framework for customizing launch research programs to meet each brand's unique needs.

Quite often, the first six months after launch shape the long-term success of a pharmaceutical brand. Physicians' initial impressions of a brand can influence how and if they use the product in their practice and these early decisions often determine prescription patterns for years to come.

Pharmaceutical marketers are well aware that an effective launch can lay the groundwork for a blockbuster. Moreover, they are well aware that launch mistakes can haunt a brand forever. As a result, there is tremendous pressure on pharmaceutical marketers to establish a brand development process that effectively positions their product and drives rapid uptake.

Pharmaceutical market researchers play an integral role in the success or failure of a new brand. One recent study estimates that pharmaceutical companies spend an average of \$4.3 million on market research during Phase 3 to support a new brand launch¹. Although research spending varies widely depending on the company and the product, it is clear that market research is a critical cornerstone to the launch process.

Watched pharmaceutical researchers evolve

In working with multiple pharmaceutical launches over the past 10 years, we have observed an interesting trend in how organizations manage the launch research process. During this time, we have watched pharmaceutical market researchers evolve from a tactical, project-oriented approach to a strategic, programmatic approach.

In the past, pharmaceutical market researchers typically followed a project-oriented approach in which they supported each step in the brand launch process with an individual, discrete research project. There was relatively little effort to synthesize insights across multiple



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Figure 1

Roadmap for Programmatic Brand Launch Research



projects and researchers often worked with multiple research vendors. Pharmaceutical researchers were often focused on executing tactical projects and there was relatively little thought about how each project fit into the overall launch strategy.

Today, some pharmaceutical researchers are evolving toward a more programmatic approach to brand launch. In this new paradigm, market researchers proactively design a multiyear, multi-phase program to support key marketing decisions across the entire launch process. Researchers are increasingly partnering with a single vendor, which can provide a more integrated design that synthesizes insights across research phases. Ultimately, this programmatic approach has enabled pharmaceutical researchers to fulfill a more strategic role in the brand launch process.

This evolution is still in its nascent stages. Although some pharmaceutical researchers have fully embraced this programmatic

philosophy, many still adhere to more of a project-oriented approach. Based on our experience with several launch brands, we feel that programmatic thinking leads to superior research outcomes.

Common research process

In working with clients who employ a programmatic approach to brand launch, we've identified a common research process. This process typically starts in the middle- to late-stages of Phase 3 development when the company has solid hypotheses about clinical trial outcomes. These companies often start their brand launch research many months or even years before having final data from Phase 3 trials.

Figure 1 outlines the typical four-step process that drives programmatic launch research. In the sections below, we will examine each of these steps in detail.

Phase 1: Market landscape

Successful launch research programs typically begin with an exploratory phase to understand the defining features within the market landscape. This phase provides the brand team with foundational market insights and helps to ensure that brand strategy is grounded in market realities. This phase also enables the team to understand what products their brand is (and isn't) competing against.

At the conclusion of this initial phase, market researchers should be able to provide the brand team with insights into the three key questions:

- Algorithm: Where does the product fit in the treatment algorithm and what other therapies would a physician or patient consider?
- Unmet needs: What are the biggest frustrations that physicians and patients have with current therapies? Where are the biggest gaps in the current armamentarium?
- Differentiators: What are the product's unique differentiators compared to other therapies within the competitive set?

In our experience, the most successful approach to this initial phase can combine many tools in a market researcher's methodological arsenal, including both qualitative and quantitative research methods. On the

qualitative side, ethnography is invaluable to understand how patients and physicians use current products and to develop a deep understanding of their therapeutic needs. On the quantitative side, perceptual mapping is a useful tool to plot current therapies against key product attributes and identify advantageous gaps in the marketplace.

Phase 2: Brand positioning

With a solid understanding of the market landscape, the researcher is prepared to tackle the next step: identify the optimal positioning for the brand. This phase defines the portion of the market that the brand can own and informs strategies for establishing that ownership.

Too often, we see pharmaceutical companies take a horse-race approach to positioning research: They create three to five positioning statements, field a survey designed to pick a winner and determine their brand positioning based on popular opinion.

It's important to remind ourselves that brand positioning is strategic and multidimensional; as such, a single opinion poll does not constitute effective positioning research.

Instead, the most effective researchers break brand positioning into its component parts and design discrete research projects focused on optimizing each of those parts. This deconstruction approach enables researchers to provide insights into several critical questions:

- Target audience: Which physicians and patients are most likely to benefit from the product? What specific demographic, psychographic or clinical attributes define the target audience?
- Value prop: What is the benefit that patients derive from using the product? What is the emotional benefit that physicians achieve by providing that benefit to patients?
- Brand character: How should patients and physicians feel when they interact with the brand? What is the brand's personality?

Throughout this process, it is important to optimize brand posi-

tioning at both a rational and an emotional level. As marketers, we all know that latent emotions play a critical role in product decisions. However, pharmaceutical brand positioning is often overly clinical and fails to connect with the emotional needs of patients and physicians.

In our experience, the most successful research programs utilize methodologies that identify latent emotional needs. For instance, when conducting target audience research, it's often important to design segmentation surveys that profile both therapeutic and emotional needs. Similarly, when conducting value-prop research, it's often important to include laddering exercises that explore the emotional benefits of each value proposition.

Phase 3: Brand narrative

Storytelling is the essence of good marketing. After identifying the ideal positioning for the brand, it's critical to create a brand narrative that provides context, color and details that bring the brand to life.

Creating an effective brand narrative is especially challenging in today's health care environment and marketers must strike a balance between two competing forces. On one hand, patients and physicians are bombarded by hundreds of brand impressions every day and pharmaceutical brand stories must be simple and succinct. On the other hand, health care can quite literally be a matter of life and death and pharmaceutical brand stories must be comprehensive so that patients and physicians can make a fully-informed decision.

As marketers navigate these competing needs, research insights are a precious resource in constructing a successful brand narrative. During this phase of the process, market research provides insights into the following questions:

- Prioritization: Which clinical messages are most important for physicians to feel comfortable prescribing and for patients to feel comfortable using the product?
- FAQs: What questions or concerns will physicians and patients have about the product? What informa-

tion is most effective in overcoming potential usage barriers?

- Story flow: In what order should brand messages be presented in order to create a logical narrative for physicians and patients?

In most instances, the biggest challenge in creating a brand narrative is not determining what to say, it's determining what not to say. In most instances, marketers have hundreds of clinical trial data points and the daunting task of creating a simple story that can be conveyed in a succinct message.

In this context, it is critical for market researchers to offer methods that help the brand team to prioritize messages. Quantitative trade-off methods such as max-diff can be especially helpful to identify high-impact messages from a long list of potential messages. Qualitative trade-off methods such as sorting exercises are a critical complement to quantitative research. This combination of qualitative and quantitative methods is especially powerful: Quant identifies which messages are most compelling, while qual provides insight about why those messages are compelling.

Phase 4: Brand promotion

As the brand team nears launch, their focus shifts to increasingly tactical questions about message execution. Once the team has a brand story, it then needs a storyteller. During this phase of the process, market research enables the team to optimize execution of the brand narrative.

Brand promotion research is typically more important for physician marketing than for patient marketing. On the physician side, the marketing team must rely on individual salespeople to bring the brand narrative to life. As such, the marketing team can lose control of the brand story if there is not strong coordination with the sales team. On the patient side, there is relatively little direct sales and the marketing team typically has more control of the narrative.

The physician sales force is typically the most important channel for pharmaceutical marketing and brand

promotion research is often focused on optimizing the sales detail. In our experience, it is often helpful to separate sales detail research into two distinct steps:

- Optimize the sales collateral used during the detail. The insights from this first step are used to shape the detail aid itself.
- Optimize the talking points delivered by the sales rep. The insights from this second step are used to shape the implementation guide used during sales training.

Although brand promotion research is often focused on optimizing the sales detail, the physician sales force is only one of many promotional channels. Other important channels to address in research include:

- Speaker programs: Optimizing the presentation materials and the talking points used in peer-to-peer channels.
- Journal ads: Optimizing the imagery and copy used in physician journal ads to ensure the message is unique and compelling.
- Direct-to-consumer: Optimizing direct-to-patient campaigns delivered through television, print and digital channels.

Customize the launch research

Thus far, we have outlined a high-level approach for pharmaceutical brand launch research and we hope that this provides a general roadmap. However, we acknowledge that no brand is the same and it's important to customize the launch research to meet the unique needs of each brand.

In this vein, we have developed a simple framework (Figure 2) for understanding various brand archetypes and designing custom launch research programs accordingly. This framework analyzes the research needs for pharmaceutical brand archetypes across four key dimensions.

Dimension 1: Competitive context

Pharmaceutical brands generally fall into one of three categories in terms of their competitive context and it is important to design research programs accordingly:

First-in-class: Brands that are the first in an entirely new therapeutic

Figure 2

Pharmaceutical Brand Diagnostic

Competitive Context	Target Audience	Brand Character	Unique Differentiator
First-in-Class	Primary Care	Functional	Efficacy
Next Generation	Specialist	Emotional	Safety
Established Class	Patient		Convenience
			Cost

class face the challenge of educating the market and assuaging concerns about a new mechanism of action. Market landscape and market education research is especially important for this type of brand.

Next generation: Brands that offer a significant improvement within an existing class often face fewer challenges than first-in-class products. As such, foundational market landscape research is typically less important for this type of brand.

Established class: Brands that are new entry in a mature therapeutic class face the challenge of differentiating themselves within a commoditized class. For this type of brand, it is especially important for research to identify a singular benefit that differentiates the product.

Dimension 2: Target audience

Pharmaceutical brands vary in their target audience. Although most brands will focus on several audiences, it's important for the brand team to prioritize their target audience:

Primary care-centric: Some brands focus their messaging on primary care physicians. This type of brand typically has a broad indication that affects a large group of patients (e.g., diabetes, hypertension, dyslipidemia).

Specialist-centric: Some brands focus their messaging on a particular medical specialty. These are typically products intended to treat more advanced disease, products with potentially severe side effects or products with a niche indication.

Patient-centric: Some brands focus their messaging to communicate directly to patients. This typically occurs in mature, commoditized

therapeutic areas where products have few major side effects and relatively few differentiating features.

Although it is often important to seek input from all of these audiences before launch, research budgets typically do not allow a deep dive into all of these segments. As such, it is critical for market researchers to focus their research dollars on understanding the needs of high-priority audiences.

Dimension 3: Brand character

Pharmaceutical brand communications fall on a broad spectrum from highly functional to highly emotional. Some brands have a more functional brand character that appeals on a more clinical level; other brands have a more aspirational brand character that appeals on a more emotional level.

Pharmaceutical brands typically fall into one of these categories:

Functional brands: Some products are indicated for life-threatening or acute conditions. The messaging for these brands tends to focus on patients' clinical needs and the brand personality tends to be more functional.

Emotional brands: Some products have indications intended to improve patients' quality of life. The messaging for these brands tend to focus on patients' lifestyle needs and the brand personality for these products tends to be more emotional in nature.

In designing brand launch research programs, it is important for market researchers to understand hypotheses about the brand character and select methodologies accordingly. Some research methodologies, such as rating or ranking exercises, are more rational activities and are

ideal for more functional brands. Other research methodologies, such as projective exercises, are more emotional techniques and are ideal for aspirational brands.

Dimension 4: Unique differentiator

When differentiating a brand from the competitive set, it is important for the brand team to develop hypotheses about its key differentiator early in the launch process. In general, pharmaceutical brands differentiate themselves in one of four areas:

- Efficacy: Improved efficacy or better long-term outcomes.
- Safety: Fewer side effects or improved tolerability.
- Convenience: Easier for patients to administer.
- Cost: Less expensive for patients or payers.

Market researchers must understand hypotheses about brand

differentiators and design research methods to understand unmet needs around them. Once the brand team has clearly identified its key unique attribute, market research plays a critical role in bringing it to life.

Litany of challenges

Today's pharmaceutical researcher is faced with a litany of challenges that are rapidly changing the role of market research: big data, data privacy, constrained budgets. Despite these challenges, market researchers must continue to provide actionable insights and demonstrate their strategic value.

Brand launch presents a unique opportunity for market researchers to demonstrate strategic leadership within their organizations. The decisions made during this launch phase will determine the success or failure of the brand and researchers have a unique opportunity to influence these critical decisions.

Embracing a more programmatic approach to launch research allows

pharmaceutical market researchers to position themselves as a strategic partner in the brand launch process. Rather than delivering individual projects to meet tactical needs, this programmatic approach allows researchers to meet strategic needs.

As researchers evolve toward this more programmatic approach, we hope that the launch research roadmap and brand diagnostics outlined here will help to accelerate pharma researchers in becoming strategic leaders within their organizations. 

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