

# INSIGHT BRIEF

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**kjtgroup**  
INSIGHT BY DESIGN



## KJT 411

News & Events

Reserve your seat today for our next webinar—**Standing Out in a Crowded, Quickly Evolving Environment: Roadmap to Publication**. With increased competition among the ever growing and crowded healthcare marketplace, there is an emergent need for pharmaceutical companies to stand out and be seen as thought leaders within therapeutic areas and/or healthcare systems. Conducting market research studies for peer reviewed publication or public release is one way for companies to be viewed as thought leaders or influence HCP decision-making. But this type of research requires a special expertise. In this webinar we will share our experiences and best practices as a step-by-step roadmap. [Register now!](#)

## Monthly Insight

Nearly one in ten Americans suffer from asthma. Each day, ten people die due to complications from the condition. May is [National Asthma and Allergy Awareness Month](#).



We understand the most important factors to getting quality work done:

- Targeting the right respondent group(s)
- Proposing efficient and effective fielding methodologies
- Quick turn around
- Best in class programming, data processing and project management

When you need a high-quality solution to address an important question, but do not have the time or budget for a full-service approach, reach out to [Apex Ops Group](#); we can design a solution to meet your needs.



## Introducing Apex Ops Group

As the cost of doing business increases, more companies are expanding their internal research capabilities and bringing work in-house that was once outsourced. But not all companies' internal resources are sufficient to fulfill the entire research study. According the 2016 Corporate Research Report by Quirk's, there are a number of challenges facing clients' internal research teams:

- Too many projects for budget
- Too many projects for staff
- Cutting costs without reducing quality

In an effort to address these challenges, and respond to the evolving needs of our clients, KJT Group has developed a new offering: Apex Ops Group.

Apex Ops Group is a branded division of KJT Group, providing operations fulfillment directly to external clients. Our services include everything that might be needed during a market research engagement: recruiting/sampling, survey programming, data delivery, etc.

For those clients who desire additional support, Apex Ops Group has the capabilities to provide additional value-added services such as design support, moderating, advanced methods and reporting.

This offering may be particularly attractive in situations where you do not want or need to engage KJT Group as a full-service market research partner, or when a "Do-It-Yourself" approach isn't the optimal solution.

## Healthcare Reform Update

A few years ago (2015), we penned an article highlighting how changes in the healthcare (HC) system might affect our clients in their professional roles. At that time, we underscored the importance of changing decision making roles and processes. Consider now, in two years, just how much this evolved. As researchers, has your sample planning changed? Has it become harder to find the right decision makers? Are panel vendors coming up short, or charging more for the same kind of work as in the past?

Consolidation continues across manufacturing, distribution and HC delivery. Expected changes to the ACA would further consolidate HC financing through more lenient intrastate insurance offerings. Consolidation can mean different things to your role, depending on the sector on which you are focused. Here are some examples we have faced.

**Medical Device:** While this is a big category, let's focus on hospital consumables, or items that are considered "commodities" such as catheters, gloves, etc.... Has this world changed? In some ways, absolutely. The hospital decision maker, when in a more strict procurement role, remains focused on costs per item, somewhat independent of clinical arguments. However, *if there is an argument to be made for quality*, in some hospitals and

even for commodities, the pathway for demonstrating a broader *clinical and economic* benefit can be made (to roles such as P&T or other review committees). The implication for manufacturers is that you need to pick your strategy. Fight on price, or if you have a clinical/economic benefit, get those data to the right people and position what is otherwise a cost decision differently.

**Pharmaceuticals:** As we said two years ago, most decisions are no longer made solely at the healthcare professional (HCP) level, especially when HCPs reside within integrated delivery networks (IDNs), or systems. What proportion of your target list is now working within an IDN or Accountable Care Organization (ACO)? Is that something that is easily understood, and if so, are you observing differential perceptions and behaviors driven by that variable? A core feature of consolidation of HC delivery will be system-wide, evidence based medical management. Cost-benefit analysis will, in part, determine treatment algorithms. This is not new in the EU and other regions, but with HC costs continuing to rise, it is going to happen in the US. Increased emphasis must be placed on system level decision making, especially in areas such as vaccine, orphan drugs, and other population health and economic driven domains.

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We continue to recommend working closely across your organization to understand how the decision-making process is evolving in your market, and how continued consolidation will further transform your market in the next five years. Your strategic planning should include various scenarios taking this into account and make it priority.

- Ken Tomaszewski, MS, PHD, President and CEO

## Garnering Insights from Online Ethnography

Online ethnography, sometimes referred to as extended online bulletin boards, can be a powerful tool for gaining detailed qualitative insights into a market (see our [November Insight Brief](#) for more information on this methodology). To do so effectively, however, can often present a challenge.

Depending on the audience and depth needed, a variety of methods can be used to enhance your online ethnography. To name a few:

- **Video Diaries** – Whether asking respondents to take a video of themselves or their surroundings, this can provide more detail than simply typing out an

answer. Videos can depict greater variety of emotion and depth into a person's life.

- **Image Upload/Collage Creation** – Asking respondents to search for one or many images to depict a particular emotion or event will get them to think differently and creatively about their response. Rather than simply saying "I felt happy," you will be able to see deeper into the emotions your audience is feeling based on the variety of images chosen.
- **Poem Writing/Story Telling** – Similar to image/collages, having participants think about an emotion or event (either real or speculative) from a different perspective will allow their deeper thoughts, feelings,

and motivations behind the primary subject matter to show through.

- **Short Survey/Voting Questions** – Having a few more structured questions within an ethnography or online bulletin board can provide powerful quantitative evidence to support qualitative findings.

A common theme through each of these methods is attempting to get participants to think outside the box. Effective online ethnography will engage respondents mentally, getting them thinking and participating in meaningful discussion with you as well as with the other participants.

- Clare Murphy, Research Associate