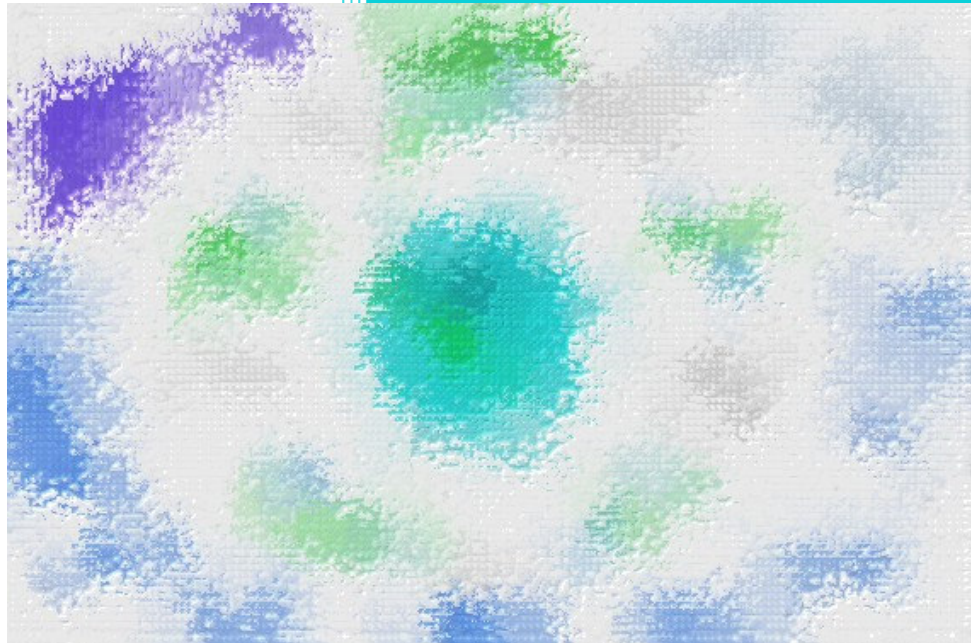Dr. Sonja Bastian

Netnography:
A Useful Market Research Tool for Pharmaceutical Industry?

Part 2: Experiences

C-f-P

Consulting for Pharma
Dr. Bastian

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EXECUTIVE SUMMARY

In Part 1 of this paper we introduced the method netnography with special focus on pharmaceutical industry's interest (Bastian, 2014). This paper, Part 2: Experiences, will give you insights in the use and benefit of the Internet based method for market research in pharmaceutical industry.

It provides data to improve product's success in the market, with special focus on different departments and various phases of the pharmaceutical product life cycle. It further analyses which product categories and indications may have the highest benefit from netnography.

Practical data are available while presenting netnographic surveys done by different pharmaceutical companies.

At the end of the paper you will be able to answer the following questions:

1. Should my department think about a netnographic project?
2. In which phase of the product life cycle is netnography useful?
3. Does netnography support the success of my medicinal product?
4. What kind of netnographic studies have been made by pharmaceutical industry?
5. What did pharmaceutical industry learn from their netnographic studies?

Competition in the pharmaceutical market is high, therefore getting knowledge about a new customer's need before competitors do might be the most important factor for the future success of your product.

MARKET RESEARCH IN PHARMACEUTICAL INDUSTRY

The product life cycle in pharmaceutical industry is managed by the interactions and activities of all departments of the respective company. It starts with the idea for a new product in Research and Development and the development of a suitable route of administration, formulation and packaging in the responsible department and ends up after clinical studies, approval in the marketing department, where market success is supported by the methods of the marketing mix. The departments do not stand isolated in the cycle but interact between each other: during development marketing is responsible to analyse whether this new product can be positioned in the market. Clinical and Regulatory Affairs identify possible hurdles possibly occuring before, during or after the approval process.

But the motor of this maschine, which makes the circle go round and round are **customer's needs** (Figure 1). Their visions and wishes for the "perfect" and "most useful" product initiate innovation and start a new round in the product life cycle. Patients have a medical need for a specific drug to dissolve their health problems , which is safe, efficient and easy to handle. The opinion of customers is build up by their experiences with the product resulting in their satisfaction.
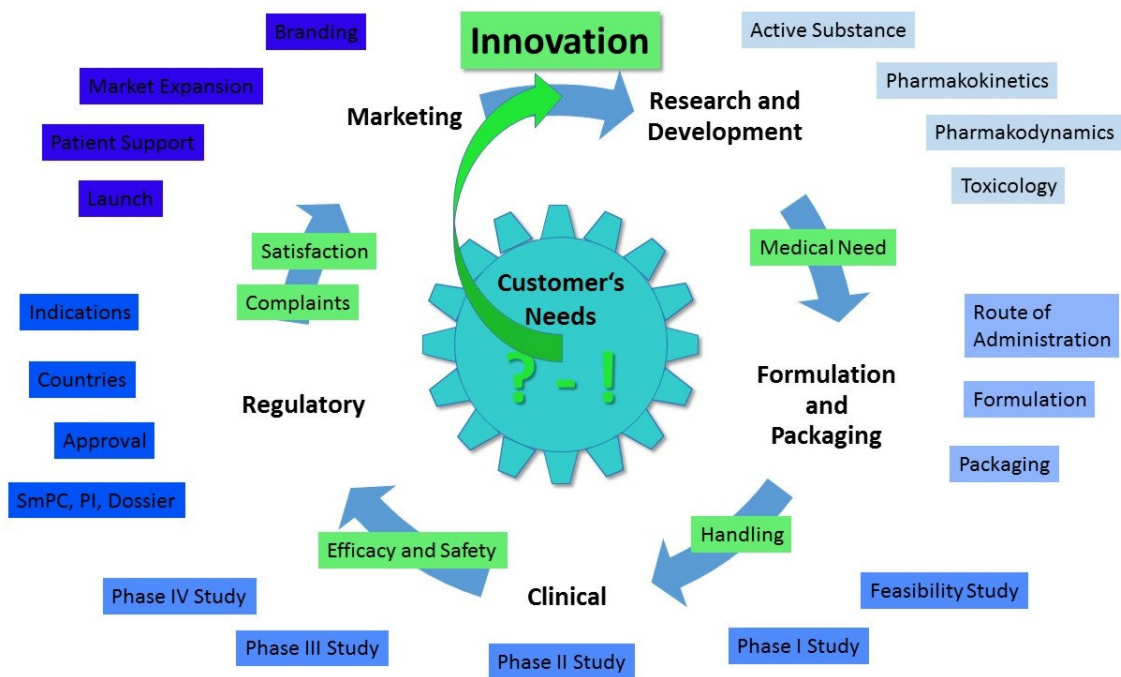
Figure 1: Product life cycle in pharmaceutical industry driven by customer's needs

Satisfaction is a summation of positive experiences for examples improvement of health status, reduction of symtoms, higher quality of life and negative experiences as there are adverse reactions, quality complaints, technical complaints, changes in daily life due to drug application (infusion, drug intake scheme or whatever).

SATISFACTION=POSITIVE EXPERIENCES + NEGATIVE EXPERIENCES

Figure 2: The "satisfaction formula"

But how does the pharmaceutical manufacturer get knowledge of customer's opinions? In contrast to other consumer goods the end user of the pharmaceutical product is unknown. If a patient comments on a pharmaceutical product, he/she will do that to his first contacts, the caregivers (nurse in a hospital, carers). Sometimes he/she will tell it to a doctor (family or hospital) or a pharmacist. But there is no direct contact to the sales people and the statements are subjected to change while passing through (Figure 2).

The pharmaceutical manufacturer sends his goods via sales partners and wholesalers to doctors and hospitals. Here again important information on customer's satisfaction is lost.

Despite the reporting of adverse reactions and pharmaceutical complaints the pharmaceutical manufacturer will have no direct access to the opinion of the end user. These reports are important, but always have a negative impact.

Until now market research surveys were the only possibility to close this gap, but open questions may implicate the answer and multiple choice questions can make the real opinion invisible.
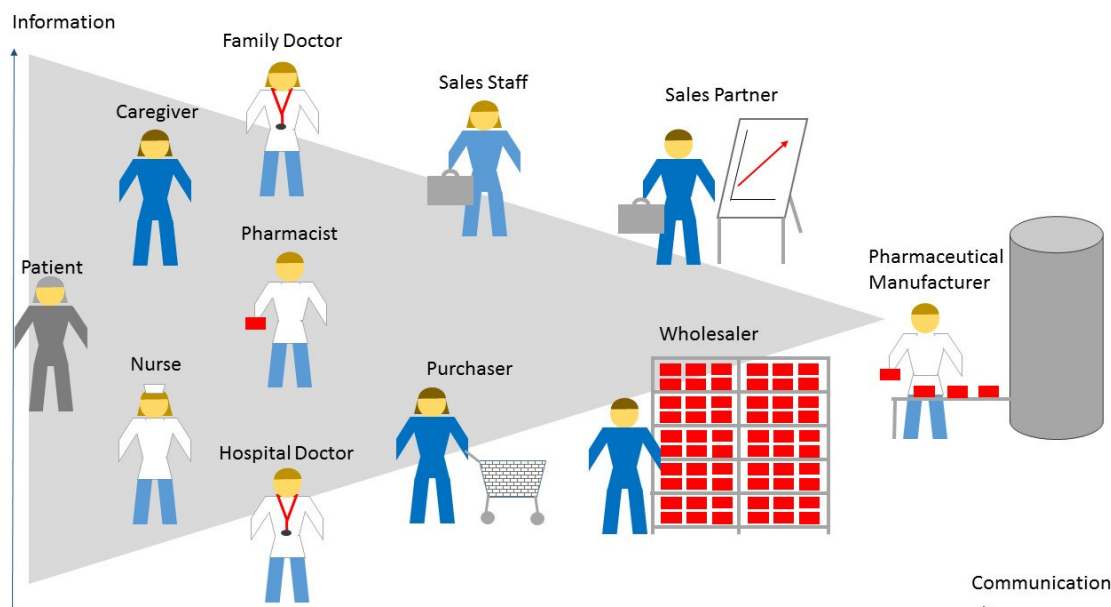
Figure 3: Factors inhibiting the communication between Patient and Pharmaceutical Manufacturer

Web 2.0 made a new method available to get unaffected, natural and unforced opinions of consumers: Netnography an online market research method which uses consumer communication to detect the basic opinion and ideas of consumers. Netnography can be faster, simpler and less expensive than classical market research. The method has been described for pharmaceutical industry use in part 1 of this publication (Bastian, 2014)

BENEFIT FOR PHARMACEUTICAL INDUSTRY

In the next sections the benefits of netnographic surveys for different departments, various phases of the product life cycle, product categories and indications are elicited.

DEPARTMENTS

Each department in pharmaceutical companies will ask different questions to the customer. Examples presented in the following sections are for illustration only and might be seen as naïve but this article should be a one-fits-all explanation. Therefore the examples are kept rather simple.

RESEARCH AND DEVELOPMENT

Research is a very deep and concentrated look into a highly specific area of biochemistry and sometimes one molecule is the centre of interest for years or even decades. The researchers know every detail of the molecule, they can imitate the behaviour of the substance under different conditions (pH, temperature, dissolution media…) and because of highly sophisticated computer programs they can predict the reaction of the organisms on the drug, its precursor, intermediates, derivatives and metabolites and even its adsorption and elimination pathways.

The secret is to exactly know what the medical need of the patient is like. A very simple example for illustrating: When should the drug after intake be effective? Immediately, delayed or retarded…:

A drug has to be taken in the evening to avoid symptoms the next day. Often the drug is released and adsorbed too early so that the main effect occurs in the middle of the night. A higher dose will be needed to have a sufficient effect the next morning. If a product improvement results in a delayed release of the drug, the active substance will be present to the right time and a dose reduction might be possible.

In online communities patients communicate on their experiences with distinct drugs. The experiences might raise such questions like that mentioned above.

FORMLATION AND PACKAGING

How should a drug look like? This is one of the most important questions in drug development. Decisions for purchasing a specific drug are made on the fact that the route of administration is more convenient for the patient, or the package is adapted to special needs of the patient.

A well-known example is the plister for contraceptives, where different methods are used by pharmaceutical companies to remind the user to daily take her pill. Today one should ask: Which is the most suitable reminder for the user? Maybe nowadays modern women would like to be reminded by their smartphone, the download information for the "APP" might be included in the package…

CLINICAL AND REGULATORY AFFAIRS

These departments are restricted due to legislation, but even here user input is possible: Should a special "travel-package" be approved for patients with chronic diseases? and What are patient's fears while taking the drug?

In the last decades of 20th century haemophiliacs were infected by blood products with HIV or Hepatitis. While the manufacturers thought about reduction of HI and Hepatitis virus load and safer products, patients discussed about another fear: more unknown infectious agents. Therefore special methods were introduced into the production to prove that other even unknown infectious agents were eliminated and/or destroyed.

MARKETING

It is obvious that marketing has the highest benefit from netnography. Every advantage compared to competitors is of highest value for the success in market. Therefore quick and easy accessible source data directly from the user are the fundament of daily work for marketers.

But even here there is no direct contact to the user, even the opinions of prescribing doctors are transported via sales people, wholesalers or distribution partners. Details or information classified as "not relevant" might be lost while passing. But for future development exactly this information might be of importance.

For some instances neither the doctor nor the pharmacist knows that the patient has reservations to use a medical device or a drug, because it shows his/her environment that he/she is sick. This fear will often not be verbalized to the doctor. Anonymity in an online

community makes it easier to talk about problems to people in the same situation or to a faceless netdoctor.

Special internet blogs to diseases launched by manufacturers give patients the chance to meet competent partners and let the manufacturer know what the customer's need is looking like (see Janssen Pharma – Schizophrenia).

PHASES OF PRODUCT LIFE CYCLE

As discussed above the Research and Development department is always looking for innovation along the medical need of patients. Patients using the approved product have a lot of experiences over the years, which they openly discuss with other patients. Over the years of experience with a special therapy that makes them specialists who may develop creative and sometimes very practical ideas for improvement. This is a possible factor for innovation, which should not be neglected. A start of a new or second generation product might be induced by a practical idea of a consumer.

PRODUCT CATEGORIES

Netnographic surveys are not suitable for every product. Which properties and outer factor makes it worth to think about?

1. The Patients: Daily intake of drugs or steady use of medical devices makes patients to specialists. They are informed about their disease, the treatment methods, advantages, adverse reactions, practicability of the use and so on. Therefore all diseases where patient's daily life is affected are suitable for netnographic surveys.
2. The Disease: Besides that the severity of the disease is of importance. If the missing of a dose makes the disease proceed or adverse reactions might occur during the chronical drug intake, the patient is more interested in a good quality of therapy. To get this information he/she will join a discussion in a community.
3. The Environment: Today one must be strong and healthy, but what about sick people in our working team? Mental diseases for example will not be public knowledge. Sometimes even the family does not know about depression, schizophrenia and other mental health disturbances. But often anonymity in the Internet will help the affected people to talk about.
4. Caregivers: Parents will search for every information which support their effort while caring their children, especially if they are suffering from a disease.
   The same will happen if the partner or other near relatives (parents, brothers and sisters) are affected by a disease. Every source of information will be used to gather knowledge.
5. Financial: Expensive therapies will be checked for alternatives.
6. Safety and Efficacy: With the progression of knowledge the patient or the caregivers will not only look for the most effective therapy but additionally for the safest. The discussion on adverse reactions is a very vivid one in all blogs in internet. People often trust a forum more than the package insert.
7. Innovative Products: Treatment for years was effective to reduce symptoms but did not cure the disease. Patients suffering from such diseases are always looking for innovations to become more "normal".

INDICATIONS

A special view on some diseases and indications is worth to do:

1. Mental Disturbances: These are the most interesting diseases for netnography because people always have trouble to talk about mental disturbances. The do not want to be signed as a "Psycho". Therefore they use forums to discuss with other affected people about their troubles.
2. Sexual Disturbances: Beauty, youth and health are the attributes with highest value in our society. Loss of hair and impotence are therefore topics in forums to get information without "outing".
3. Pregnancy: Today women ask for advice in forums and online communities if they have questions on their gravidity or the unborn child.
4. Disturbances reducing work power: All employed people have to be strong and healthy, but what about people suffering from migraine, pain, rheumatoid arthritis…? They often keep their disease as a secret, because they are afraid of not beeing able to work under pressure.
5. Vaccination is a treatment of healthy people. People do not trust the doctor, because he/she will have a financial benefit from vaccination. To get a complete picture on vaccination programs people search in the Internet.
6. Life threatening diseases: Especially if there is no medicinal alternative people are searching for all possibilities not to miss a new therapy.
7. Paediatrics: the most valuable asset are our children. For their well-beeing we will search for every information in every source. The Internet is the biggest, quickest, most accessible and most comprehensive one.

Every indication and disease might be analysed by its own to find out if netnography is a suitable method. Finally small feasibility studies can performed to get an impression on the discussions in the Internet.

JANSSEN PHARMA – SCHIZOPHRENIA

The following study description is a collection of citations from an article. (Dossin, 2013)

THE QUESTION

Patients suffering from schizophrenia find it difficult to ask their doctor for advice and also find it hard to continuously take their medication because they do not like to be reminded on a day to day basis that they are ill. The conversation at a doctor's office are difficult and take a lot of time, which doctors nowadays do not have.

Janssen Pharma wanted to understand the schizophrenia patients and to help them by establishing a suitable internet-website. A communication platform was existing, but the patients and caregivers should be empowered to initiate conversations. The awareness and benefits of a continuous medication should be raised.

Traffic and engagement on the website was very low. Therefore research was needed to identify what patients discuss, how they discuss, in what context and what opportunities are identifiable to start conversation between patients and the pharmaceutical manufacturer.

THE STUDY

It was decided to listen to all publicly available patient conversations in five languages using Social Media Netnography.

RESULTS

The outcome of this study revealed content gaps in the patient journey, identified critical issues and cultural differences. The results highlighted the current misperceptions in Schizophrenia, the important role of caregivers, described the profile of a typical patient key opinion leader and recommended website improvements.

CONSEQUENCES

Especially carers were very active online. Therefore a special section for caregivers was established on the new website to provide information and interactive tools to become a platform for conversation between carers.

Because the interests differ much special sections were launched to build content for the different visitors according to their special questions and interests.

The Janssen Schizophrenia 24x7 website (http://www.schizophrenie24x7.de/) after update is available in 16 countries in more than 5 languages and has more than 200.000 visitors with a 20% revisit rate.

MERZ PHARMACEUTICALS – NETNOGRAPHY ON ALZHEIMER CAREGIVERS

The following study description is a collection of citations from a presentation. (Gries, unknown)

THE QUESTION

What are the particular roles, attitudes and needs of caregivers of Alzheimer Disease (AD) patients? What are their "hot topics" when discussing "in private"? What is their authentic language when talking about AD?

How suitable is netnography for researching (non-professional) healthcare stakeholders? How rich are the generated insights? How well can the findings be generalized?

THE STUDY

1st stage: Client briefing; Web-crawling and identification of relevant sites; Selection of media to be analysed; 1 to x sources (in y languages)

2nd stage: Extraction of content from websites; Text, photo, video…; Determine coding framework (=analytic pattern)

3rd stage: Qualitative Analysis

RESULTS

Identification of key topics discussed on the Social Web-issues related to a specific brand/ company/ industry/ disease area etc.

Analysis of product/service features, brand images, usage patterns or attitudes expressed within user - generated content, i.e. opinions, habits, customer experiences exchanged in the private or public online context

Identification of tonality of communicative patterns – authentic, open, emotional communication style, without interviewer bias

Identification of real - life consumer language which can be used for development of communication material – speaking your targets' language

Efficient data collection – quick, inexpensive, broad reach

Netnography is a valuable qualitative snapshot of overall target group dynamics, also giving guidance on how to liaise with them in the Healthcare 2.0 world

SANOFI PASTEUR - VACCINATION

The following study description is a collection of citations from an abstract. (Rigole B., 2012)

THE QUESTION

To measure and understand the magnitude, content, and overall global online sentiment regarding the effectiveness and safety of vaccination.

THE STUDY

The study analysed 100 million mentions (more than 3,000 mentions of vaccines, vaccination or immunization a day). Search tools accessed Facebook, Twitter, YouTube, blogs, and healthcare communities in top markets, including US, Europe and China. The languages monitored were English, Spanish, French, Portuguese, German, and Chinese.

RESULTS

Selection criteria for online platforms, identification of online opinion leaders and their role in the communication, limitations of the method, incorporation into marketing strategies.

CONCLUSION

As seen in part one of this article (Bastian, 2014) the use of Internet is still increasing and people are using it for multiple reasons. They discuss and inform each other in different forums and platforms.

Market researchers for consumer goods for example *Nike* (Bartl, et al., 2008) or *Beiersdorf* (RWTH-Aachen, not available) are using this sources to find out what the customer's needs are. The information they gain are useful in product development as well as for the marketing and the product positioning. The companies were even able to recruit lead users or even employees.

In pharmaceutical industry this method is not as broadly used as in other areas. Reasons for that are primarily that very sensitive medicinal information is obtained from the posters. Often the posters use real names and might therefore be identifiable, which should be avoided (Kozinets, 2002). Collecting an informed consent as done in clinical studies, is retrospectively not possible. If upcoming discussions are included in the study an informed consent might be launched in the forum, but this might alter the discourse of the communication because people will feel observed.

A possibility to avoid a lot of trouble might be the launch of a separate discussion website like done by Janssen Pharma: The community is informed that this is a webspace supported by a company, legal requirements can be met (Datenschutz) and informed consent can be collected. If advertising for a specific product and the sponsoring company is avoided, the neutrality makes the community more open for a discussion and will result in a realistic picture of the product and the market drawn by the consumers.

A critical point is the selection of the sources. Only a very small amount of communities can be included in a netnographic study. The right selection will paint a complete picture of the customer (patient and caregiver) and his/her needs as seen in the study of Merz Pharmaceuticals.

The identification of opinion leaders and their effect on the decisions of the community are important information which may alter the communication strategy of the manufacturer, while adapting the argumentation, altering the language in the communication and at the end changing the marketing strategy.

Nevertheless one should be aware of the appearance of adverse reactions and quality complaints which might be posted in the community, too. A special procedure how to cope with it should be introduced before starting a netnographic survey (Bastian, 2014).

In summary netnography should be considered as an important and powerful market research tool for pharmaceutical companies, to bridge the loss of information which is missed due to the complex distribution pathway resulting in an interruption of communication between the manufacturer, and the end user.

FIGURES

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