GAINING FORESIGHT INTO THE NEEDS OF DIABETES PATIENTS

Combining digital observation with traditional surveys, we reveal the purchase journey for people with this common medical condition.

The client
We conducted this study to offer pharmaceutical and healthcare companies a fresh understanding of diabetes patients’ experiences when searching for medical information.

Situation
Nearly one in five US households is affected by diabetes, but reaching patients with this common medical condition is challenging in a fragmented media landscape. Most companies that provide treatment and support for this ailment use customer survey data for market intelligence.

Though useful, these surveys depend on patients accurately remembering where and how they searched for diabetes information. As with most research that relies on people to recall information from days or weeks in the past, there are reliability and validity concerns with these studies.

Approach
Our diabetes market experience research blended digital observation with traditional surveys to better understand diabetes patients’ buying, navigation and search behavior. We recruited people with diabetes from our patient panel and asked them to download our tracking app onto their computers.

For three weeks, we monitored respondents’ web use with our proprietary tracking software and collected data about URLs they visited and their search behavior. We added some short entry and exit surveys to key websites for the diabetes category.

We also asked participants to record their online and offline experiences in a diary twice a week for the first two weeks. In the third week, we asked half to research blood glucose meters and the other half to research weight management.

This approach allowed us to capture data about respondents’ attitudes as well as to observe their behavior. It also enabled us to link attitudinal data with behavioral data, providing a deeper understanding of the intentions behind individuals’ actions.

We combined our online tracking (comprising 426,000 URLs and searches) and survey data with further in-house sources to get a more complete picture of the patient’s journey. These included our Roper Diabetes Survey (a “day in the life” study of 2,200 diagnosed patients) and consumer/sociographic profiles of our patient panel members.

Outcome
The study delivered an extensive understanding of diabetes patients’ digital journey, from where they go for health information to how they make purchasing decisions for glucose meters. It also uncovered information about the roles that online and offline sources play in their research and shopping behavior. The results can help marketers in this category unlock digital experiences that meet their customers’ needs. The data is based on peoples’ real behavior and intentions rather than on their potential inaccurate recollections of their previous experiences. It can help brands drive better results from their media planning and buying, content and messaging strategy, in addition to optimization of digital assets for diabetes patients.

Some examples of our insights included:
- Nearly three quarters of patients use search engines for research.
- Most search topics are centered on managing weight and blood sugar levels.
- General health sites generate higher audience reach, more repeat visits and longer visit duration than diabetes-specific sites.
- Diet and recipe sources track the highest repeat visits across site categories.
- Most patients seem to visit between two and five relevant sites to fulfil their online needs.

Your contact partner is there for you:
Melissa Garcia | T +1 609 375 5246 melissa.garcia@gfk.com

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