

# FOUNDATION NEWS

## Welcome.....

To the first Foundation News - a journal for all market researchers and we hope you like it. There are articles written by Foundation Agency Members on topics of relevance to us all as well as some anecdotes and humorous parts (not intended to be deadly serious).

We would like to carry more advertising in the future and so please consider this publication for your company services and job vacancies - we reach about 2000 world wide international marketing researchers and the advertising rates are very reasonable. Prices and deadline dates are found on the inside page.

Contributions from readers are welcomed and so please 'Contact Us' about this. Agency Foundation Members can have their personnel updates and agency news included free of charge (subject to space of course!).

## In this first issue

EphMRA Spring Training Workshop



Jack Hayhurst Award winners - France 1999 - Annual Conference



Internet Research



Understanding in Transcultural Research Settings



EphMRA Dates for your Diary



In the Canteen Corner



Agency News

## Coming up in April...

### EphMRA's Spring Training Workshop

#### BRANDING THE FUTURE IN HEALTHCARE

Luxembourg, 13-14 April 2000

This year's EphMRA Spring Workshop will bring you a flavour of the latest insights and trends on the topics of DTC and branding, and the contribution that marketing research and business intelligence can bring to these important issues.

This intensive two-day event will combine lectures from a multi-disciplinary team of experts in the field with interactive practical sessions, using the latest learning techniques:

- Day 1 on branding will be facilitated by experts in branding research and branding strategy, Taylor Nelson Sofres and Interbrand

- Day 2 on DTC will have real life examples from the USA by experts from Nelson Communications, and will address the question on what the opportunities are for DTC in Europe from various angles: the legal side by a legal expert, the industry perspective by the ABPL. We will also be debating how marketing research could contribute, learning from key German consumer research professionals from I+G.

This workshop is open to EphMRA member companies and Agency Foundation members. Details on the web site.

## Coming up in November

### The EphMRA Basic Training Course "Introduction to International Pharmaceutical Marketing Research"

15 - 17 November 2000, Brussels. Details and programme will be sent out in April 2000.

## Contact us

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# Facts and Figures

*about the Newsletter publication in 2000*

Copy/Advertising Deadline : 19th May      Newsletter Issued : June  
Copy/Advertising Deadline : 11th August      Newsletter Issued : September  
Copy/Advertising Deadline : 10th November      Newsletter Issued : December  
Advertising rates and details are as follows.

Four colour and B&W ads can be carried. Prices are quoted in Swiss francs.

	Quarter page	Half Page	Full Page
B&W	300 CHF	500 CHF	800 CHF
Four colour	N/A	750 CHF	1200 CHF

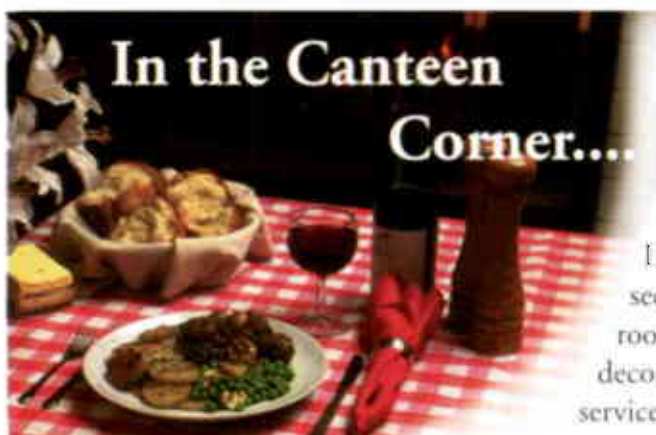
Prices do not carry VAT (EphMRA is a Swiss based Association) and invoices will be issued in Swiss francs - you transfer the relevant amount into our bank account (details of which will be on the invoice).

The next Newsletter will also be available at our annual conference in Madrid - see the web site for details (28 - 30 June 2000). Otherwise it will be mailed to you.

## Briefbits

### EphMRA Yearbook 2000

The Yearbook will once again be available for distribution at the annual conference in June. All agency subscribers get at least one free copy and this will be mailed in July if we do not see you in Madrid.



For those of you in the Agency world there is one thing about our clients that we all come to know, love, look forward to and, sometimes, try to avoid. I'm not talking of those excellent requests for proposals that seem to leave out the key question; nor am I thinking of those wondrous presentations where the Chief Executive hasn't a clue what a projective qual technique is; no, I'm talking about that culinary delight - the company canteen!

Those of us fortunate enough to remember the heady days of the early eighties will recall the delight of being invited to the 5th Floor restaurant at Sandoz in Basel. Quite possibly the best lunch restaurant in Basel (although the two across the river might disagree), the 5th Floor

was always a two hour procession of gourmet pleasure. For a more modern comparison we have The Cottage in Ingelheim. Discrete seclusion in private rooms, delicately decorated, and outstanding service.

But enough of the luxurious, what about the more regular events. The quickie lunch, stolen in a 30 minute break. Queuing for 10 minutes to get a good quality hamburger in the Merck canteen, only to spend the next 20 minutes watching it go cold as you realise that the "casual meeting" at the check out is actually your unannounced lunch meeting. None of us who have done it can forget walking 200 yards through walled gardens to sit by the pond in Alderley Park, whilst eating wholesome northern English cuisine at Zeneca.

Of course the reason we agencies enjoy these pleasures (and trials) is quite simple. None of us have a canteen! Many have tried, but none have succeeded, which is why we crave the attendance of a client at

our office so we can try the new restaurant for lunch, or simply hit the old haunts we've used for years.

As you have probably realised by now, this small article in the inaugural EphMRA Foundation Newsletter is not meant to be serious. What we would like is for those of you who have had particularly good (or bad) experiences in company canteens to share them. Anonymity will be preserved if requested; I, for one, could not possibly name the canteen that seem unable to produce a decent boiled potato, or the other where the proximity of the toxicity lab is just a little concerning!

So, a call to your lighter side; send in your reviews and comments, for this is one element of our business that we all share, but hardly ever discuss. I will leave you with one further thought; if you have been working with a client for over five years and then find that they have a previously unmentioned executive dining suite, do you think you'd be little concerned?

Signed : Anon Hungry Exec

Last June, we had the pleasure of attending the EphMRA Foundation inaugural meeting in Paris.

During the course of this meeting, a lively and most interesting debate ensued concerning the reasons for joining the EphMRA Foundation and its future direction and development. As expressed at this meeting, it is our

strong - and perhaps controversial belief - that the Foundation represents a real opportunity for investigation and debate of those issues which currently present enormous and critical challenges to our industry. Moreover, it should ideally represent a decision making forum where after due debate and consultation - and presentation of the appropriate investigatory reports -

general future Agency strategies and standards can be decided, where appropriate. In our opinion, the Foundation thus represents an exciting and excellent vehicle for Agencies to investigate critical issues in an unbiased environment and to use the results of such investigations to real, practical effect.

guidance. Faced with such challenges, it appears to us that Agencies require a Forum which can not only objectively investigate and debate these issues but which can set, where applicable, policies and standards and be a vehicle via which their collective voice can be heard at the highest level within the industry.

European legislation? What are current incentive expectations for the various types of research projects and to what extent, if at all, can non-financial incentives (e.g. data feedback) play a role?

As stated, these are very much personal views and we would welcome feedback/discussion

from, and amongst other,

## AGENCIES and the FOUNDATION

1999 was a year of real challenge to the medical market research industry in general - not least from a legislative perspective. 2000 is likely to continue in the same vein, with the introduction of the new Data Protection Acts, European initiatives with respect to the protection of patient confidentiality and real respondent issues such as over-researching and the setting of sensible incentive levels /

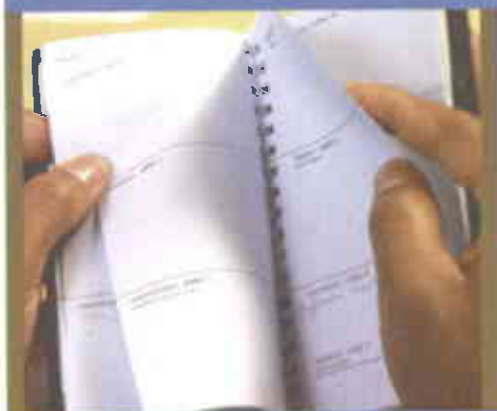
Topics for research by the Foundation should thus continue to be at the "cutting edge" to give us all on the Agency side an invaluable, unbiased insight into the issues we face on a daily basis. To what extent does over-research represent a real problem amongst European doctors? How are doctors likely to respond to requests for patient market research data against the background of the new

Foundation members (contact details given below). In the meantime, we congratulate the Foundation Committee on an excellent initiative and look forward to meeting our Foundation colleagues again in Madrid.

Contact

Barbara Babbage / Joan Goodrick at Medicare Audits Ltd on (44) 1795 479208.

### EphMRA dates for



your diary

EphMRA Spring Workshop -  
**13 - 14 April 2000 -**  
Luxembourg.  
"Branding the Future in  
Pharmaceuticals".

EphMRA Training  
Workshops : 27th June 2000  
- Madrid

"Lifecycle Management :  
Optimising Brand  
Performance from launch  
through Patent Expiry"

"Harnessing the Potential of  
the Internet"  
EphMRA Annual Conference  
- Madrid - **28 - 30 June 2000**

Details of the Madrid events  
are on the web site at  
<http://www.ephmra.org>

"Introduction to International  
Pharmaceutical Marketing  
Research" - basic training  
course.  
**15 - 17 November 2000,**  
Brussels.



# Jack Hayhurst Award Winners

- France, June 1999

Last year at the EphMRA Annual conference the winning paper of the JHH silver salver plus a cheque for 1000 Swiss francs was presented by Sandra McAuliffe, AstraZeneca, Nigel Burrows from the marketing research company PiTRE of Milan and William Jack from the healthcare consultancy group The Mattson Jack Group of St Louis, Missouri, USA and High Wycombe, UK.

The paper, entitled 'The Truth is Out There - Exploiting the X (L) Files', described how integration of primary market research enhanced the construction of an international forecast model for a primary care market and which contributed to the evaluation, planning and potential impact of a future product launch.

A critical factor from the start was that the project had to be completed 7 weeks from the date of approval. Also, one of the most striking aspects of the exercise was the way in which a diverse group of companies working out of various global locations including Milan, London, High Wycombe and St Louis, came together so quickly and effectively. The most important element enabling such success was the recognition, on both the client and consultants' sides, that clear and focussed objectives were vital to meeting AstraZeneca's needs. These were well defined from the start and, consequently, the mandate was met.

The final model developed by The Mattson Jack Group was a patient based, epidemiology driven spreadsheet model incorporating six major

countries and projecting the market to 2010. The model was very flexible, allowing the user to assess different scenarios by changing assumptions concerning:

- compliance within each market segment
- dosage, price and regimen by segment
- launch date by segment
- effect of new events by segment, e.g. changes in growth rate
- effect of patent loss
- level of promotional spend

Realistic estimates of market share for various configurations of the product within the model were made possible by a unique calibration technique developed by PiTRE. This calibration was applied to the results of the product test which incorporated a hybrid multiple conjoint design coupled with a patient

segmentation approach. This study design in effect allowed two stages of research to be carried out simultaneously, thus compacting the overall primary research timings and allowing the tight deadline to be respected.

Final results were that AstraZeneca received a robust, easy to use global new product forecast model that effectively integrated results of primary market research. The project serves as an example of how a true global partnership between consultant agencies and a client, effectively planned and managed, can result in efficiently achieving a client's global objectives.

A more detailed highlights report on the 1999 conference can be found on the EphMRA web site at <http://www.ephmra.org/>

## New Job, New Life

The market research executive tiredly clicked his auto-mouse. The forecast came up for at least the fifth time and red, blue, green and rather sick looking yellow lines snaked across the flat, wall-mounted screen. Basle Corporation was simply not going to perform as well as bitter rivals BMGlaxoPlough or BayerLillyAventis. And the two new "super-groups", Merck-J&J-Astra and Pfizer-Sankyo-AHP were simply miles out ahead, in sales as well as in pipeline potential.

The executive pondered his options. Choosing a new model, the normal refuge when he sought a more favourable outlook, was impossible on this occasion. He had been specifically instructed to use the formulae that were a critical part of the tried and tested 2008 version of MicroSoft-Vodafone's Exelocator mark III Forecasting Module. Changing the figures was another alternative but this would require lots of explanation and, frankly, he didn't have the

feel for this data, plus he knew that the CEO was up with the latest figures. The situation was taking on nightmare proportions. His boss, Emma, was unsympathetic to the fix hole he had dug for himself and he, he knew, would be left to carry the can. The last option was but a single mouse-click away.

Click.

He practically felt the change in the room's atmosphere. Holo-Employ was a fairly new system and not yet that advanced, its graphics were jumpy and the girl's face was less than appealing. But at least computer simulations get right to the point.

"We have your most recent CV on file and we are confident that your profile fits two possible opportunities" she trilled. "Pfizer-Sankyo who you know is about to take over the People of China's Drug and Chemical Company is looking for another

experienced analyst with a track record of working in difficult situations for its operations in Mexico." His heart sank. Pfizer-Sankyo might be bad enough but the thought of his 11th move in six years was just too much. And Mexico as well - even dirtier, more dangerous and even more crowded than ten years previously. And what might "difficult situations" mean? He didn't really want to know. He snapped back into focus - the girl, well, the third generation cyber-holo-model had been talking and was now looking at him expectantly.

"I'm sorry" he said. "I must have missed your other suggestion."

"I said that there was also the possibility of working for one of those agencies that provide data and forecasting models to the pharmaceutical industry. The one we are working for is located in a nice suburb of London, with good benefits, an altogether

Whichever way you look at it the use of the internet in our everyday lives is increasing at a phenomenal pace. There are endless statistics quoted that illustrate this point. For example, in London advertising space the use of web site addresses has gone up from c £250,000 to over £3 million in the last twelve months. Even now we are only scratching the surface. In the USA, the powerhouse of internet use and development, 75% of internet use is conducted by only 34% of the population. Scope for future development is enormous. The medical profession, patients and the pharma industry are

## Internet research offers speed and convenience, but what about quality?

all adopting the internet at an exceptional rate. Over recent months we have seen a proliferation of information and service sites for both doctors and patients. We have been monitoring doctors' access and use of the Internet over the last year, and have noticed a significant increase in uptake over even the last few months. We have also witnessed many companies introducing internet based services. These include access to healthcare professionals and consumers, and offer a

bewildering array of services and applications, some of which offer access to thousands, if not hundreds of thousands of patients.

I believe that we are now at the stage of Internet development in healthcare market research where net based interviewing is fast becoming common practice. Yet as a novel approach it is still experimental, and the ground rules for good practice have not yet been established. To me the key advantages of internet research are quality and speed. Cost is often quoted as the third key advantage, but in the short term at least, investment is required, not just in software but more importantly in building databases of potential respondents. One only has to look at companies, such as Amazon.com to see that even market leaders in e commerce are having difficulties making money. They have just announced losses of \$ 185 million in the last year.

Speed of turn around is indeed a key advantage in today's competitive environment, but this should not, and need not, be at the expense of quality or convenience. In one sense quality can be enhanced by the use of web based

interviewing. Questionnaires can have logic checks built in so that contradictory or out of range responses are not allowed, and complex filters can be administered without the intrusion of interviewer based error. However, quality is more than this, it is also about ensuring that we have a representative sample, and that respondents are recruited in a rigorous way. Simply posting a questionnaire on the net and inviting eligible respondents to reply is asking for problems. This approach runs the risk of self selection bias, and we may not even be sure that we have bona fide target group respondents. Using existing patient databases may or may not be indicated, depending upon the selection criteria for those patients. So for example, conducting research amongst diabetic patients who have themselves elected to join an information service on diabetes is likely to be biased as a result. The principles of good research design, recruitment and validation which have been the bedrock of market research practice for years, should continue to be important considerations for research. As professionals we should work hard to ensure that quality standards are upheld in the work we do whatever the approach.

Bob Douglas - Taylor Nelson Sofres Healthcare

excellent environment with job security. We hear from previous placements there that it is a good place to work and GphMRA-2006 rated it highly in its new handbook" she breathed in her strange, metallic voice, almost as if the concept of a positive situation was too difficult to convey.

The exec shifted the weight in his chair. He'd heard enough. He knew what he had to do and staying where he was simply wasn't an option. He sighed and, reaching for the mouse, dialled into Internet Mark-6 and pulled up a real estate map of Mexico City.

Stephen Godwin - Taylor Nelson Sofres Healthcare

### Briefbits EphMRA Lexicon



**Hope members of the Foundation received their pack of 10 complimentary Lexicons. It is a very useful booklet - over 50 pages long - and is available to non members at 10 Swiss francs each - 6 Swiss francs each to Foundation members.**



# (Mis-) Understanding in transcultural research settings: Selected Anecdotes

By  
**Matthias Fargel**  
Managing Director  
psyma international medical marketing  
research GmbH, Rueckersdorf/  
Nuernberg, Germany

of the glue and the speed and efficacy of the glue during the studio session scheduled for the following

Market research is about understanding.

While sharing this basic notion with most of you, some may also join in the perception that global strategic medical marketing research is about the likelihood of being understood across multicultural settings in a time still to come. This is a much more challenging quest.

Of course, EphMRA members are proud of our ability to cope with the related issues in our daily work - in most cases at least. However, even after 24 years in the business I am finding myself in situations beating me. Most of them are just fun, others leave me thinking: How much do we really understand?

How likely is it that we, our requests and our client's preparations will be understood? Our European client and I had spent two days of in-depth exploration about present treatment practices among Korean specialists. This was performed in a studio in a regional field-service provider in Seoul.

When the time came for us to say farewell, the Korean research executive started bowing in front of us saying,

"I hope my work has been useful for you."

He bowed once more, very deeply and then again, even deeper. Finally, while standing in a steeply reclined position, looking to the floor we heard him mutter,

"I am feeling so much ashamed by working for foreigners".

He turned, without looking at us again, and left the scene.

Today, I am still wondering whether he was referring to my European client, to myself as a foreign agency or to his expatriate Anglo-Saxon boss - or the lack of opportunity to serve his national industry!

Misunderstandings are not the exclusive domain of intercontinental relationships. Interdisciplinary teams composed by medical and pharmacological scientists, technicians, business administrators, sales and market research staff can also create their own particular set ups for misunderstandings.

We presented the results of a handling test with different reconstitution devices and procedures among nurses and physicians. It was a small, qualitative study with a total of  $n = 80$  respondents from across 4 countries. The outcome was exactly clear. One of the three prototypes fared much better, whereas the other two received quite low scores and drew hefty criticism. The tension in the meeting room had gone, and the post-presentation atmosphere seemed relaxed.

Finally, one technician from the clients interdisciplinary asked doubtfully,

"Are these results really true?"

With tongue-in-cheek I replied,

"Truth is not my business Sir. We are dealing here with probabilities and likelihood only. We may be wrong by sampling or statistical error, of course, but these results are quite likely."

Oh - if only I had sensed what discussion and further written correspondence that silly answer would have triggered off - all due to devaluating the worth of a market research study for not being 'true'.

For an innovative fibrin glue to be demonstrated to a sample of thoracic and general surgeons in Beijing and Shanghai, we requested that the local studio provide a large chunk of fresh liver. We wanted the interviewer to demonstrate the application

week.

Our Chinese counterpart didn't react to our fax for these specifications until around 72 hours later. Finally, we received the reply,

"We have been trying hard to find a source of human liver for your purposes for that day. Seems difficult. May we use a pig liver, instead?"

Ever since then, we have been trying to be even more specific with our specifications!

Singling out tablets or pills from the manufacturers original packaging is widely spread in many of the developing countries. This is mainly a result of the limited purchase power of local patients paying for their medicines themselves. While some local manufacturers are meeting this demand by offering mini-packs with two or four units only (sometimes illustrated with pictograms for the indication), global pharmaceutical companies maintain their standardised blister size throughout the world - with mixed results.

We have learned that singling out drugs from original packages in the pharmacy seems to be correlated with the incidence of cigarettes sold on a one-by-one basis by local street vendors - a useful indicator.

When observing the practice of singling out, we also found a widespread sale of (presumed) RX drugs by far less authorised outlets. These included those such as normal retail shops, kiosks and even street vendors. It seemed less surprising to find anti-diarrhoea products, antibiotics and analgesics in their drug collection. However, even more surprising was discovering singled-out parts of blister strips for oral contraceptives sold on an 'as needed' basis!

# AzyX, a revolution in market information

AzyX is a new, independent provider of European pharmaceutical market information, firmly committed to revolutionising pharmaceutical sales information services. AzyX is unique in this business sector, offering pharmaceutical companies a comprehensive range of geographically segmented regional and national pharmaceutical wholesaler-based sales information services, delivered to customers in open formats. To provide these radically new services, AzyX has teamed up with strong technology partners and information specialists, building on their experience of their mutual market, the pharmaceutical industry. To gain an insight into the company, an Independent Journalist spoke with René DEREQUE, founding partner and chairman of AzyX.

AzyX already has offices in Belgium, Germany and Portugal. The company is expanding into Eastern Europe this year, then to most other Western European countries in the medium term.



## ■ What is so unique about AzyX?

**R. DEREQUE:** First and foremost, our people. Our employees and managers have extensive experience of the sector, giving them a thorough understanding of the pharmaceutical industry's needs.

Their specific knowledge of sales, marketing, information technology, market research, statistics, etc., is a vital asset for the achievement of our business objective: to deliver a new generation of customer-orientated, flexible pharmaceutical information.

Our corporate commitment to promoting a transparent commercial policy and flexible services will form a solid base for long-term partnerships with our clients.

## ■ Why did you create AzyX?

**R. DEREQUE:** Pharmaceutical companies operate in a fiercely competitive environment. Cost management for new and existing drugs represent an ever-increasing challenge for the industry. This generates a need for even more rapid response, targeted sales information services for marketing and sales force management. So my colleagues and I formed AzyX, with a clear commitment to providing pharmaceutical companies with precisely the information they need - no more and no less. We decided to offer our customers flexible, tailor-made services from which they can choose those they need and pay for these only. To provide state-of-the-art information and services for our demanding customers, AzyX has developed partnerships with dynamic information specialists such as AC Nielsen and Marketing Map. We all share the same passion for customer service and support.

## ■ What makes AzyX different from other suppliers?

**R. DEREQUE:** I would say, our policy. Our customers pay only for what they use. They are free to choose exactly the information content and medium they want. They also have a free choice of analytical tools, including our own extremely powerful analysis software, developed specifically for the pharmaceutical industry's needs. A further AzyX difference is that our services are focused, with an initial concentration on fast-track sales data in the European market.

## ■ Why is Information Technology such a key element for AzyX?

**R. DEREQUE:** Our aim is to provide our customers and partners with a new generation of marketing tools. We need to process huge amounts of information very rapidly, and this is

only possible with state-of-the-art technology. Therefore, we asked IBM and Cognos to develop a secure technology platform and fire-walled, independent systems for us to guarantee fast, secure and efficient information production and delivery.

As a new player in the market, AzyX does not carry the burden of any technological legacy. Our information can be easily integrated into the different information systems operated by our customers.

## ■ What can you tell us about your Geopharma Concept?

**R. DEREQUE:** The Geopharma concept is a new approach we have developed in partnership with pioneering geo-marketing companies and university experts in the field. The core of this concept is the integration of geographic, demographic and sales data, and it uses the latest statistical methods to yield the most accurate results. By adding business intelligence solutions to real-world data, we can achieve greater accuracy in market definition and target identification. This in order to help our pharmaceutical company customers to optimise their sales force efforts and commission programmes.

## ■ What does AzyX deliver and when?

AzyX supplies pharmaceutical wholesaler-based monthly sales information to pharmaceutical companies. This information covers both regional and national sales. We can already deliver information and data from the whole of 1999 and January 2000. Customers can choose to receive data in flat file format, on CD-ROM or print, with or without our data analysis tools. Our customers' freedom of choice is assured by the fact that we run an open systems information architecture. And our team of dedicated, highly skilled experts provides full customer support for all the data we deliver.



**René DEREQUE, chairman of AzyX: "AzyX is unique in the pharmaceutical information sector: our customers only pay for the data they use"**



# Agency News

## Isis Opens Its Third Office in the United States

Isis Research has expanded again with a new office in Maryland, located less than 30 minutes from Washington, DC.

Gerarda Collins, President of US Domestic Research is heading up the office with a team of 6 professionals. This office will be responsible for the execution of business carried out in and for domestic US Pharmaceutical Companies. The address is: Isis Research, Quarry Park Place, 9175 Guilford Road, Columbia, MD 21046. Tel: (1) 301 317 1000 Fax: (1) 301 315 1262 E-mail: Gcollins@isisresearch.com.

Isis Americas, which was opened in 1998, is now three offices strong. The Isis Group of Companies now has 15 offices world wide.

For further information please contact Kirstie Mackenzie on (44) 20 8788 8819 or e-mail: Kirstiem@isisresearch.com.

## Letters

The Newsletter is happy to receive letters and comments from readers - these will be published if appropriate.

## New Research Director for Isis Research Asia

Marc Yates from Isis Research is moving to Hong Kong in his newly appointed role as Research Director - Asia.

Marc moves after eighteen months as Country Manager for Isis Shanghai. Marc helped set up the new office in 1998. Originally Marc joined Isis Research in 1996, working for the International Therapy Monitors Group.

In his new role Marc will be aiding Dean Edwards, Regional Managing Director for Asia in servicing new and existing clients.

For further information please contact Kirstie Mackenzie, PR Manager on (44) 20 8788 8819 or e-mail: Kirstiem@isisresearch.com

## News About Your Company??

It would be great to feature updates here - just send them to the Newsletter (see Contact Us) for the next edition. Mugshots and photos welcome.



The EphMRA Foundation Newsletter is available to all EphMRA contacts. Articles are accepted from EphMRA Foundation members (unless by invitation) - these articles do not necessarily reflect the views of EphMRA. News about agency personnel can be included free of charge for Foundation members.