

FOUNDATION NEWS

EphMRA is looking forward to welcoming everyone to Brussels this month and to an exciting conference programme and productive agency fair. We have new conference opening speakers for Wednesday afternoon 26 June - don't miss it.

You can still register on-line through the EphMRA web site or fax your completed registration to us.

Our next newsletter will be the post conference News - issued at the end of summer to give you all a comprehensive summary of the proceedings.

See you all in Brussels...

Many thanks

Bernadette Rogers

Foundation Administrator

STOP PRESS... STOP PRESS

New Conference Opening Speakers on 26 June -

see programme later in
Newsletter

In this Issue:

PRM&T Update and Activities

No Need to Skip The Desk Research

Researcher - Get out of your box

Musing on Models

Brussels Conference Update

Contact Us

By phone, fax or email.....

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Visit the EphMRA web site
at <http://www.ephmra.org>



Staying Ahead

**PHARMACEUTICAL MARKETING RESEARCH
CONFERENCE, TRAINING WORKSHOPS
& 41ST ANNUAL EphMRA AGM**

**VENUE: SHERATON HOTEL AND TOWERS,
BRUSSELS, BELGIUM
JUNE 2002**

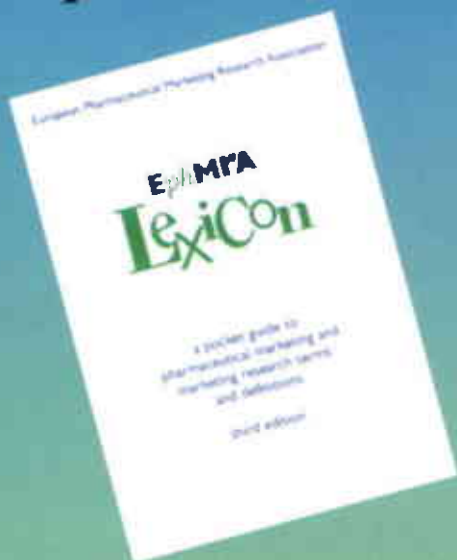


Conference Registration Hotline
Janet Henson
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Fax: +41 26 402 58 82
Email: hensonschnee@bluewin.ch

EphMRA Committee Meetings 24/25 June
EphMRA Training Workshops 24 June
EphMRA AGM 26 June am
EphMRA Agency Fair 27 June
EphMRA Conference 26-28 June

Briefbits

EphMRA Lexicon



The new and third edition of the Lexicon is available for purchase at 9 Swiss francs each.

STOP PRESS... STOP PRESS... STOP PRESS...

THIS YEAR GOODY BAG PICK-UP AT AGENCY FAIR

Company Delegate Goody Bag -
at the EphMRA Conference
Sheraton Hotel, Brussels,
June 2002

Why not insert your promotional item into the company delegate Goody Bag?

- ✓ you can advertise your company to all those attending from a pharmaceutical company
- ✓ all those receiving the Goody Bag are your potential customers
- ✓ your gift will serve as a nice aide memoire
- ✓ this enables you to promote your company and logo
- ✓ it costs you nothing to do this - except provide 140 items



If you find this interesting then contact:
Bernadette Rogers, General Secretary on 0161 304 8262
or email to MrsBRogers@cs.com

FOUNDATION NEWS EDITOR WANTED

We are looking for a new Foundation News Editor - the job lasts for 4 editions and so we would like to invite applications for the post from agency executives.

Please contact EphMRA for an application form.

Facts & Figures

about the Newsletter publication

Copy/Advertising Deadline: July 12th 2002.
The next edition will be the post Conference Newsletter issued September 2002.

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).

PLEASE READ - AGENCY FAIR 2002

IMPORTANT

The 2002 Programme Committee has evaluated and discussed many suggestions from members and agencies about the conference for 2002. One important decision has been made about the agency fair for 2002.

A number of major conference sponsors and agency fair exhibitors asked the Committee, following the fair in Athens 2001, to consider opening the fair to pharmaceutical company delegates and agency exhibitors only. Thus agency delegates who have chosen not to book a booth space will not be able to attend the fair in 2002 but this does not affect attendance at any other event at the conference.

The agencies who approached EphMRA about this matter felt that the agency fair should be available only to those exhibiting. EphMRA has decided to support the idea and in 2002 the agency fair will be open only to those agencies who reserve a booth space.

To facilitate booking there will in 2002 be 3 price levels for fair booths:

- the current standard single/double space
- the current small agency space fee (available to those agencies who qualify)
- a new (lowest) priced booth for one person consultants/freelancers.

We hope that most agencies will appreciate this new initiative - which has come about because of agency request. If you would like to discuss this further please feel free to contact your agency representatives on the committee Allan Bowditch Martin Hamblin (bowditch@martinhamblin.com) or Julie Buis Aequus Research (jbuis@aequusresearch.com)

Many thanks
Bernadette Rogers
EphMRA General Secretary

EphMRA Diary

2002

24 JUNE

Brussels, Belgium
Annual Conference
Segmentation - How to
Effectively Target and
Promote to the Customer

24 JUNE

Brussels, Belgium
Annual Conference
Internet Research: Pushing
the Boundaries

24 JUNE

Brussels, Belgium
Annual Conference
Positioning: Getting It Right

1 OCTOBER

Papers submission deadline
2003 Conference
Shaping the MR Puzzle

6-8 NOVEMBER

Brussels, Belgium
Intermediate Pharmaceutical
Marketing Research Course
"The Research Toolbox"



2003

12-14 MARCH

Madrid, Spain
Intermediate Pharmaceutical
Marketing Research Course
Conjoint and Pricing

10-11 APRIL

Brussels, Belgium
"Effective Segmentation"
PRM&T Spring
Training Workshop

11-13 JUNE

Madrid, Spain
EphMRA Annual Conference

4-7 NOVEMBER

Brussels, Belgium
Basic Introduction to
Pharmaceutical
Marketing Research



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Web site at <http://www.ephmra.org>

**HOPE YOU
ALL
RECEIVED
THE EphMRA
DIARY IN
THE MAIL**

**THIS SHOWS OUR
EXTENSIVE
PROGRAMME OF
TRAINING COURSES
OVER THE NEXT
YEAR OR SO.**

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**BRUSSELS JUNE 27
AGENCY FAIR
RAFFLE WINNER**

**The first 25 agencies to
book and pay for their
stands in Brussels were
entered into a prize draw -
the prize being an extra
booth space at the agency
fair on 27 June.**

The winner is:

I+G Health Research

**Congratulations -
I+G Health Research
now have a double
exhibition space for the
price of one space.**

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CONFERENCE SPONSORS

EphMRA are most grateful to the companies below who have generously supported the Conference and AGM.

SOLE SPONSORS - COFFEE BREAKS

Martin Hamblin GfK

SGR International

SOLE SPONSORS - POST CONFERENCE NEWSLETTER

Martin Hamblin GfK

SOLE SPONSORS - WELCOME COCKTAIL PARTY

I+G Infratest + GfK Suisse

SOLE SPONSORS - BRUSSELS CABERET EVENING
WITH GALA DINNER 26 JUNE

IMS

CO-SPONSORS - EphMRA MEDIEVAL
EVENING 27 JUNE

EphMRA, SSRI, Medistrat

SOLE SPONSORS - AGENCY FAIR LUNCH 27 JUNE

Taylor Nelson Sofres Healthcare

SOLE SPONSORS - CONFERENCE BAGS

Isis Research plc

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I+G Health Research

SOLE SPONSORS - LUGGAGE LABEL

CAM

SOLE SPONSORS - FINAL CONFERENCE PROGRAMME

Healthcare Research Partners

SOLE SPONSORS - CD-ROM OF CONFERENCE PAPERS

NOP World Health (NOP Healthcare/ Strategic
Marketing Corporation/Market Measures Interactive)

SOLE SPONSORS - CONFERENCE SIGNAGE

Isis Research plc

SOLE SPONSORS - CONFERENCE PEN

**Psyma International Medical Marketing
Research GmbH**

SOLE SPONSORS - DELEGATE LIST

Martin Hamblin GfK

Update on PRM&T Activities

New Member

We are pleased to welcome **Jill Gregson** of Novartis and **Carolyn Fenwick** of AstraZeneca to the committee.

WE STILL NEED MORE MEMBERS

If you are interested then please contact Janet Henson
00 41 26 402 58 81 - hensonschnee@bluewin.ch

THE COMMITTEE IS ORGANISING AND PLANNING THE FOLLOWING COURSES

- see the EphMRA website for more details call Janet Henson or Bernadette Rogers



November 6-8 2002 - Brussels - Intermediate Pharmaceutical Marketing Research Course - 'The Research Toolbox'

The speakers for the course have now been announced, and the full registration materials and programme have been mailed, and are of course live on the www.ephmra.org

EARLY BIRD
FEE CUT OFF -
AUGUST 1 2002

Workshop Objectives

This course is designed as an intermediate course for research practitioners who want to develop their skills beyond a basic understanding. The course will focus on a variety of research techniques and applications required by the professional market researcher.

Delegates will leave the workshop with a better understanding of

- Questionnaire design and scaling techniques
- Translating research objectives into methodology
- Sampling theory and statistics
- Cultural differences influencing research design
- The application of projective and enabling techniques
- Analysing and interpreting data
- Working with agencies

Who should attend?

The training course is aimed at researchers who have either attended the Basic Training Course, or who have over 1 year's market research experience.

Convenors & Organiser

Representatives are convening and organising the workshop from the EphMRA Primary Research Methods and Training (PRM&T) Committee: -

Bob Douglas from Taylor Nelson Sofres
Catherine Franeau from UCB Pharma
Janet Henson, Workshop Organiser.

March 12-14 2003 - Repeat of Intermediate Pharmaceutical Marketing Research Course - Conjoint and Pricing - at the Melia Castilla Hotel, Madrid, Spain.

April 10-11 2003 - 'Effective Segmentation' - Annual 2003 PRM&T Spring Training Workshop - at the Sheraton Hotel and Towers, Brussels Belgium

Workshop Objectives

This course is designed as an intermediate course for research practitioners who want to develop their skills beyond a basic understanding. The course will focus on a variety of research techniques and applications required by the professional market researcher.

Delegates will leave the workshop with a better understanding of

- The value and uses of segmentation in strategic and tactical development.
- Important considerations before embarking on market / customer segmentation. Outputs desired and inputs necessary.
- The value of qualitative research to feed quantitative segmentation.
- Key analytical segmentation techniques (pitched at a researcher level not advanced statistician level).
- Data collection methods suitable.

Who should attend?

The target audience for this intermediate course is those who have been working in an international pharmaceutical market research department or agency for 2-4 years.

Convenors & Organiser

Representatives are convening and organising the workshop from the EphMRA Primary Research Methods and Training (PRM&T) Committee: - **Stephen Grundy** - Martin Hamblin GfK, **Carolyn Fenwick** - AstraZeneca and **Janet Henson**, Workshop Organiser.

November 4-7 2003 - Repeat of Basic Introduction to Pharmaceutical Marketing Research

AT THE 2002 CONFERENCE IN BRUSSELS WE ARE ALSO ORGANISING THE FOLLOWING WORKSHOPS: -

Internet Research: Pushing the Boundaries - June 24

- Internet workshops have become an established part of the EphMRA AGM agenda over the last few years. The focus for this year is more participative than in previous years involving delegates completing an online questionnaire, break out discussion, and live debate. Fresh topics such as advanced methods, Paradata and emarketing will also be covered. Emphasis will also be given to case study material.

Positioning Getting It Right - June 24/25 - this is a repeat of the PRM&T autumn 2001 workshop.

IN ADDITION THE COMMITTEE HAS JUST COMPLETED THE FOLLOWING PUBLICATIONS

The reaction to the recent PRM&T publications of 'Managing A Market Research Project' and 'Research through the Product Lifecycle' has been very positive and many extra copies have been ordered from Bernadette. You can still order extra copies - here is a reminder of their content:-

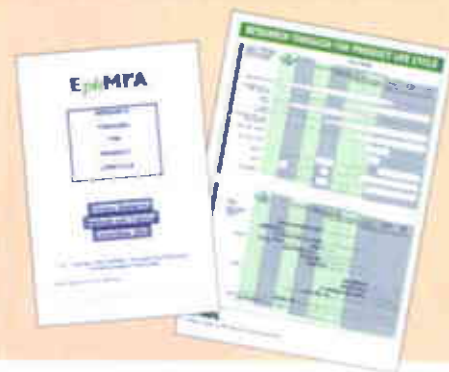


'Managing A Market Research Project'

gives guidance to both pharmaceutical company market researchers and agency researchers, as to good practice in running research projects. The aim is to improve communication, working practice and to ensure that projects are run to the satisfaction of all parties. The PRM&T Committee drew up this brief with particular assistance from Martin Hamblin GfK and Taylor Nelson Sofres Healthcare.

'Research through the Product Lifecycle'

is an update of the previously named 'Strategic Guide to Identifying and Researching the Influencers on Pharmaceutical Prescription Products.' The publication and accompanying wall chart is designed to be a guide that illustrates the main groups of influencers on prescribing a pharmaceutical product. It also highlights the types of marketing research projects that could be conducted during the life cycle of a prescription pharmaceutical product.



The update of the **"Options For Training"** database is now completed and is published on the web site. This comprises of a list of Marketing Research courses with content, venues, length, pricing and target audience. If your agency offers any courses and would like to receive a questionnaire please contact Bernadette Rogers.

EphMRA Forecasting Course Review 17th - 18th January 2002

The two day EphMRA PRM&T Intermediate Level "Forecasting" training course co-venued by Stephen Grundy (Martin Hamblin GfK) and Ulrich Wusten (Bayer) was a success; its blend of presentations, discussions and workshop activities provided much.

The course set out to further delegate's knowledge and understanding of forecasting; to enable them to advise their internal personnel and customers more effectively. "Forecasts will always be wrong, but with skills and applied knowledge the plan is to improve forecasting to reduce error."

The forecasting cycle was reviewed by Panos Kontzalis (Novartis Pharma), from strategic (long term) to operational (short term); examining optimum approaches to differing forecasting situations. Critical success factors and the who, why, what, where and how of forecasting were effectively demonstrated including how to act when a "trend fracture or trend shock" occurs.

Terry Hardy (Radmos Ltd) reviewed "Getting it Done", with an overview from the development of a forecasting plan to follow-up and re-emphasising the importance of objective setting. A strong review of linear forecasting was delivered and Terry graphically demonstrated the importance of reviewing forecasts regularly. "If 3 points are higher or lower, then something has probably changed."

"In forecasting, confidence stems from robustness," said Richard Murgatroyd (Mattson Jack Group) as he stated the importance of constructing models which have patient as well as volume sales inputs.

Inputs for forecasting can be varied, Alec Finney (AstraZeneca) & David Pearmain (MH GAMMA) showing that defining and understanding the market is vital for success. The forecasting model template should include all facets patient flow, including population, prevalence, diagnosis, total treatment, drug treatment by class taking into account mono and combination therapy and brand level assumptions.

Some myths were uncovered too:

- Accuracy ≠ Precision ≠ Quality
- Consultants are not all seeing oracles
- Comprehensive/complex models are not necessarily more accurate
- It is not easy to know, predict or measure the accuracy of a forecast

Alec Finney also provided interesting views on improving forecast quality. "A quality forecast is fit for the purpose of decision making - managing risk and resource allocation is vital." Marketing companies should focus improving forecasting quality in the short term (up to 2 years) and global teams upon improving long term forecasts (up to 5 years). Alec said, "don't confuse business targets with the forecast", and stressed "you can't forecast your way out of trouble."

There are many pitfalls in forecasting, Ulrich Wusten highlighted the traps in time series analysis & identified them through pattern recognition.

The course included interactive sessions and actual forecasting was practised in the workshops run by Frank Cuoco (Dynamic Research Solutions Inc.). The teams showed their creativity, but also their understanding of the impact of the "exit level" forecast.

The group agreed that successful organisations operate with one data set and always document their assumptions. Moreover, critical to success is senior management support, a clear understanding of the customers' requirements, a sound and agreed process, links from strategic to operational forecasts, cross-functional consensus, and reporting and acting upon forecast variance and forecast accuracy. "There must be a willingness to take decisions and make changes" (a delegate).

Stephen Grundy,
Martin Hamblin GfK - for and on behalf of the EphMRA PRM&T Committee.
Course convenors Ulrich Wusten - ulrich.wusten@bayer-ag.de
and Stephen Grundy - steve.grundy@martinhamblin.co.uk

Researcher - Get out of your box



This column is meant to stimulate new thought and look at some of the criticisms that research faces.

To kick it off I rang some colleagues in European marketing positions and market research agencies and asked them when they last felt that market research had thought "out of the box" in a way that had given a competitive advantage.

Interestingly, the agencies had numerous case histories. Some of my client market research contacts could mention instances, but only one of the marketing managers I spoke to could identify how market research thinking 'out of the box' had helped.

This, I hear you say is hardly a comprehensive survey and I certainly wouldn't put it up as anything except anecdotal but, if representative, it asks a few questions.

Is it that, as market researchers, we market ourselves so badly that our innovation is not recognised? Is it that our innovation is not creating action and so is regarded as meaningless and ignored? Or are we quite simply not thinking outside the box?

Does it matter if we don't think out of the box? I suppose we could ask ourselves why bother to be on the planet - why did God give us a brain? Yes, to me, it does matter that we add value and are not just managers of a process!

A good test for yourself is to think over the last working day (or two) - how many times did you put a stop to potential 'out of the box' thinking and how often did you encourage it? If the latter is bigger, e-mail me. I will report how many I received in the next issue.

To prove that we do sometimes think out of the box we have put in some examples. These have been given to us by a number of agencies and clients. Some may seem more out of the box than others.

Thinking out of the box

Using actors to act out a product, letting the doctors direct the action to understand the brand character.

Using Focus Vision on the net for international research with real time digital translation.

Faced with understanding patients views in a teenage market using interviewers involved in child counselling services to improve the quality of information collected.

When using brand projective techniques choosing ones which interrogate all of a respondent's five senses including taste, touch and smell.

Separating the views of future thinkers and laggards in all product development research.

Creating segmentation which is easier to implement by using motivations and psychographics, not simply attitudes or behaviour.

Integrating results of the debrief into action by using neurolinguistic programming (NLP) based moderation - as part of an immediate post debrief workshop.

Creating market research that is publishable in peer reviewed journals - one example here was a product wishing to "own" improved quality of life, examined factors affecting QoL and then had this published.

When using role play do it in threes, giving doctor, patient and observer feedback.

Doctor - recruit a doctor incentivised recruitment.

Driving a coach round and parking outside seminars to grab doctors as they finished and conduct interviews on the coach.

Using good guy / bad guy interrogation techniques for certain topics.

If you would like to contribute out of the box examples please email me.

Kim Hughes
The Planning Shop International
kim.hughes@planningshop.co.uk

EphMRA

European Pharmaceutical
Marketing Research Association



In Brussels during the week of the conference

24/25 June

Positioning - Getting it Right

24 June

Segmentation - How to Effectively
Target & Promote to the Customer

24 June

Internet research - Pushing
the Boundaries

6-8 November

The Research Toolbox, Brussels, Belgium

Full details on the EphMRA Web Site
www.ephmra.org

TRAINING

PBIRG DIARY

September 23

Industry Networking Reception

(Basking Ridge, NJ)

October 21-22-23 2002

Fall Education Workshop

(Princeton, NJ)



PBIRG
Pharmaceutical Business
Intelligence & Research Group

NO NEED TO SKIP THE DESK RESEARCH

Each of us has learned that when you start a new marketing research project, the first step is to start with the collection and review of secondary information (information that already exists). But how often does a researcher jump into primary work without reviewing the secondary information? When a market research agency receives a request for proposal it will not automatically review sources that already exist. Because these sources belong to other vendors? Because their expertise is primary research? Because it is assumed that the client has already gone through this process? Take care primary researchers! Often there has not been a proper analysis of secondary information. Sometimes the client does not know where to find this information, and sometimes tight deadlines force your client to jump into primary research.

In many agencies there is little knowledge on secondary data sources. Will this change now that vendors of secondary information start to distribute their data through Internet? Sources with syndicated research (market research that is conducted on behalf of several clients) have always been difficult to find. My main help in identifying these sources are the members of EphMRA's medical data committee and their Review of Syndicated Sources. And now I found an Internet source that provides me with an instant overview of healthcare reports from various publishers. I have found quick information, good value for money. What are your experiences with marketresearch.com?

Nicolette Huiskes
NHIC
n.huiskes@nhic.nl

NOVARTIS GLOBAL SALES FORECASTING TEAM WINS AWARD



Dr Panos Kontzalis as member of the Novartis Global Sales Forecasting Team has won a prestigious internal company award - the first Global Marketing Team Award - which has been awarded "for an outstanding team effort which goes beyond the call of duty and creates bridges between groups and departments".

The Forecasting Team was said to have "established a credible and consistent process for bringing bottom-up unit forecasts from the CSO's together into one global database. The Team's diligence has improved the data quality to the extent that others can rely on the forecasts for fact-based decision making".

Congratulations to Panos and the other Novartis Team members.



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FROM INFORMATION TO KNOWLEDGE

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Internet: www.medipragma.com



Musing on Models

Dear Colleague,

So they did not like the forecast figure you gave them, and they asked what would happen if they doubled the sales force and cut the advertising spend. Well, what they really wanted was not a forecast but a model!

Models are a scenario based forecasting method. The time series forecasts we have discussed prove a sound estimate of the sales etc. at a future point in time - assuming that the world remains relatively constant. However, the world may be due to change and the model will assist you to estimate the effects of the change. However, at the end of the process you will not have a single number to defend, but a range of numbers each relating to a given set of differing assumptions.

There are many kinds of models and we will look at the more common as we muse our way down the catwalk. The rules are different from the generation of the time series forecast and firstly we will consider these.

A model is a simplified version of the real world. The more complex the model becomes the less understandable it becomes, and much is gained in terms of knowledge of our markets from the development of the understanding of the working of the model. The model may be very small e.g. $\text{Sales Value} = \text{Unit} \times \text{Price}$. If the units remain constant and the price changes the effect can be seen on the Sales Value. This simple equation carries some assumptions, for example the number of units sold will not change with the price. There is no price elasticity. A model of this kind is easily understood, but only a few people directly involved in the maintenance of the model will understand a government economic model and many users of the output will be sceptical of the answers.

It is important to understand that a model approximates real life through a series of mathematical equations. Again simplicity assists the end user to understand the model, but it is also the duty of the model builder to ensure that the equations are fit for the purpose. There may be a linear response between advertising and sales over a restricted period of time. However, this response may not be direct in all cases and there may be an interim period of "awareness" e.g. most people are aware of 3G phones but as yet few are purchased. Because awareness is measured as a percentage of population it is not linear. If we changed the sales equation to $\text{Sales Value} = \text{awareness} \times \text{price} \times \text{units}$ the result would be of no use at all because of the non-linear (curved) component being activated against the direct relationship between price and units in the first equation. In this case use would have to be made of simultaneous equations.

Your model will be mathematical and the output will be a number. Models cannot be judgemental or apply gut feel. However some models can, and do, include Fuzzy logic which approximate these effects.

The most important element of the model is that the user controls the input to the model. Therefore, the model has to be built in such a way that the user can understand the inputs required.

Why should you model?

The model allows you to test possible options without the need for a field experiment. This can greatly reduce the cost of the final experimental work if that is eventually required. For example if we know that 3 calls have to be made on a doctor within a six month period before he will prescribe a product, a model can be developed that considers the possibility of making those calls and the possible numbers of doctors who could be seen. This simple model will then

allow you to calculate the numbers of representatives required, and assuming a prescribing rate what the resultant sales will be. In addition you could vary each of these assumptions to develop an up and down side view. This model would be a classic planning tool but when the plan is implemented it can also be used to monitor performances.

You must bear in mind that the model will not make decisions for you. It can help clarify the decision process and highlight areas that require further investigation before a decision can be made. Alternatively it may also highlight the key risk areas within a plan. It is therefore critical that clear, firm objectives are set BEFORE building the model commences. The objective setting process MUST work backwards.

1. What will be the output required and for what purpose?

This will determine the input data. It is extremely difficult to change a model that has been built to cope with another purpose. If you build a model to identify the share of patients for a new drug and specify that price is not an issue, the resulting model may need to be rebuilt if the effect of price changes on patient numbers is subsequently required. Such an error in the definition of the objectives will result in a model that does not meet the requirements and one which will over run the estimated costs by a long way. Expect to spend several days on identifying the output requirements, indeed discussion in this area may take as long as the building of the model.

2 What will the user need to control?

Here simplicity is essential. Try to keep the variable input down to less than ten, preferably six. Computers perform massive calculations very quickly but the human brain soon begins to lose the visualisation of the impact of many changing variables. Remember you need to understand why the model is producing a given result.

However, if you know that a given element is going to be important demand that it is included in the model but be prepared to lose access to something that is unlikely to be subject to change.

3 What time frame is required?

This will have a big impact on the design of the model. A model that is looking at a situation only one year away will be built differently to one looking out over a 15 to 20 year time period. In the former change in the environment will probably be small but large changes may be required for the latter.

This may also mean that you have to make use of surrogates or methods that simulate information to drive the model.

Having developed the objectives. Consider the data required. It may be that some of this has to be gathered by new market research, other data may be held in-house but in areas that the user of the model is unaware. When you have identified the data, you will understand the gaps that need to be filled including the gaps in knowledge. This may then require further refinement of the objectives.

Over the next three musings we will consider distribution models, epidemiological models and finally promotional models.

Regards,
Terry Hardy
Radmos
terry@radmos.freemove.co.uk

Brussels Conference Update

There is still time to register for the conference and agency fair in Brussels - please register on-line at <http://www.ephmra.org>

Here is the latest conference programme:

MONDAY 24 JUNE

EphMRA Committee Meetings

09.00 - 18.00	Classification Committee
10.30 - 17.00	NFC Committee

EphMRA Training Workshop

10.00 - 17.15	Segmentation - How to Effectively Target & Promote to the Customer
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EphMRA PRM&T Committee Training Workshop

10.00 - 17.30	Internet Research: Pushing the Boundaries
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EphMRA PRM&T Committee Training Workshop

10.00 - 18.00	Positioning Getting It Right
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Evening Free

TUESDAY 25 JUNE

EphMRA PRM&T Committee Training Workshop

09.00 - 13.00	Positioning Getting it Right Cont.
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EphMRA Committee Meetings - Buffet lunch for all committees served in Horizon Room

09.00 - 18.00	Classification Committee
09.00 - 17.00	Database & System Committee
	Medical Data Committee
	NFC Committee
09.00 - 17.00	Sales Data Committee

10.00 - 17.00	Executive Committee
14.00 - 17.00	Strategic Business Analysis Committee
14.00 - 17.00	PRM&T Committee

PRM&T Committee

17.00 - 18.00	Joint Meeting of Executive Committees & Committee Chairman
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19.30	Welcome Cocktail Party hosted by I+G Infratest + GfK Suisse - Salle de Nations Room
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WEDNESDAY 26 JUNE

EphMRA Foundation Meeting

09.45 - 10.45	For Agency Members of the EphMRA Foundation only
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EphMRA AGM - Salle de Nations

For EphMRA/PBIRG Members, Associate members and all pharmaceutical companies only - except by invitation

08.30 - 08.45	EphMRA Presidents Report
08.45 - 08.55	Address by PBIRG President
08.55 - 09.05	Address by PMRG President
09.05 - 09.20	Classification Committee Report
09.20 - 09.30	Database & Systems Committee Report
09.30 - 09.40	Medical Data Committee Report
09.40 - 09.50	PRM&T Committee Report
09.50 - 10.10	AGM Delegate Coffee - Salle de Nations Foyer
10.10 - 10.35	Reports of the NFC, Sales Data and Strategic Business Analysis Committees
10.35 - 10.45	EphMRA Treasurer's Report & Vote
10.45 - 10.55	Discharge of Executive Committee
	Election of Officers: President & Vice President
10.55 - 11.00	Incoming President's & Vice President's Address
11.00 - 11.05	2003 AGM & Conference Announcement
11.05 - 11.15	EphMRA Foundation
11.15 - 12.15	Statutes and future role of EphMRA

EphMRA Pharmaceutical Conference Staying Ahead

EphMRA Foundation - Salle de Nations

12.15 - 12.30	EphMRA Foundation Presentation Verification of the Internet as a Research Tool - Jennifer Brown & Peter Winters - PSM, Research - Canada & UK
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12.30 - 14.00	Lunch - Sponsored by EphMRA - Horizon Room
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EphMRA Conference - Salle de Nations

14.00 - 14.15	Introduction - Uwe Hohgräwe EphMRA President - Johnson & Johnson - USA
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Session One - The Future Power of Communication

Chairman: Julie Buis - Aequus Research - UK

14.15 - 14.20	Chairman's Introduction - Julie Buis
14.20 - 14.50	CRM: Management fad or enabler of success? Michael Thomas - PWC Consulting - UK
14.50 - 15.20	Alliance Relationship Management: Making Alliances Work Stuart Kliman - Vantage Partners - USA
15.20 - 15.50	The Future of Effective Communication in the Pharmaceutical Industry Lies with Global Branding Larry Lannino - LM&P - USA <small>The importance of global branding within the framework of new technology, and increasing DTC advertising. Why it should be the cornerstone for future effective promotional communications to enhance brand profitability, by creating efficiencies.</small>
15.50 - 16.10	Delegate Coffee

continued over >>

16.10 - 16.40 Rocket or Damp Squib - What can we expect as DTC in Europe takes off?
Martin Godfrey - Ogilvy Healthcare - UK
 It is now certain that DTC in Europe will happen in one shape or form, but what is the current status of EU and national legislation on DTC in asthma, diabetes and HIV, and what do the main stakeholders in this process currently hold? DTC in Europe will differ from USA, but how and what are the opportunities, and how can the industry capitalize from them.

16.40 - 17.00 DTC Advertising - Tracking ROI to Stay Ahead in a Changing World

Mark Nissenfeld - Ziment Associates - USA
 US DTC advertising - how it can be used and measured, a successful DTC advertisement must not only be effective in generating patient awareness, it must also generate a sufficient ROI. It must do this by bringing a patient through the entire treatment process ending with compliance. Depending on where an ad falls in the continuum, it will have a difference impact on the 'push' and the 'pull'.

17.00 - 17.20 Reflections on the first three papers
Allan Bowditch - Martin Hamblin GfK Inc - USA

17.20 - 17.45 Panel Discussion Chaired by Julie Buis

17.45 Presentation of the Winner of The EphMRA Award For Contribution to Pharmaceutical Marketing Research

18.45 Brussels Cabaret evening with Gala Dinner sponsored by IMS at the Plaza. Dress Formal

EphMRA Pharmaceutical Conference Staying Ahead



Session Two: How Marketing Research can add value to Business Decision Making

Chairman: Allan Bowditch - Martin Hamblin GfK Inc - USA

09.00 - 09.10 Chairman's Introduction - Allan Bowditch

Pricing Research - What's the point - not every company bothers?

09.10 - 09.50 Pricing Research along the Medication Life Cycle

Volker Janssen & Klaus Hilleke - Simon Kucher & Partners - Germany
 A look at pricing research required in the different phases of the product life cycle, why it should be carried out and what results can be expected. How to use results when developing a comprehensive pricing strategy, over whole lifecycle of a new product.

09.50 - 10.30 Pricing Studies: When and How

Bill McKenna - Strategic Marketing Corporation - USA
 Pricing studies are among the most hotly debated topics, this paper explores the value of pricing studies and their utility in varying situations, with suggested guidelines. The presentation will also encompass the views of industry leaders.

10.30 - 11.00 Coffee - Sponsored by SGR International

Payers - Are we getting any guidance?

11.00 - 11.40 Are we getting any guidance?

Brian Lovett - Vision Healthcare Consultancy Ltd - UK
 Looking at the views of payers toward pharmaceuticals, the need to focus on these groups and the requirement for new methodologies and study design to improve payers understanding.

11.40 - 12.00 Interactive Debate - Chaired by Allan Bowditch

AGENCY FAIR - At the Pyramids Exhibition Centre - open only to Pharmaceutical Company delegates and those agencies/consultancies exhibiting

12.00 - 17.00 Agency Fair

12.00 - 14.00 Agency Fair Delegate Buffet Lunch in the agency fair - sponsored by Taylor Nelson Sofres Healthcare and EphMRA

15.00 - 16.00 Agency Fair Coffee - sponsored by Martin Hamblin GfK

18.45 Brueghel Medieval Party at the Curaghann Celler Caves - co-sponsored by EphMRA, Medistrat and SSRI (Social Survey Research Information Co., Ltd.) - Dress Smart Casual

Session Three: Serendipity or Portfolio Management - Two ends of the Spectrum

Chairman: Nigel Burrows - Pitre - Italy

09.00 - 09.10 Chairman's Introduction

09.10 - 09.45 Franchise Development - the Importance of Portfolio Management and Serendipity

Stuart Bowman - Wood Mackenzie - UK
 An overview of current tactics used for franchise management within the Pharmaceutical Industry. The paper will also assess the increasing importance of portfolio management for companies to build and maintain therapeutic franchises in a consolidating industry.

Session Four: Can Marketing Research truly contribute to the New Developing Pharma technological evolution?

Chairman: Patrick Denis - Pfizer - Belgium

09.45 - 09.55 Chairman's Introduction - Patrick Denis

09.55 - 10.25 Customer Relationship Management (CRM) Metrics - The Partnership with Market Research

Shelia O'Connor - Eli Lilly & Company - USA
 CRM is a buzzword of many industries, where companies are attempting to become 'customer centric', a very expensive undertaking of time and money. First hand experience illustrating the partnership market research had in CRM pilots in establishing both 'hard' and 'soft' metrics.

10.25 - 10.45 Coffee

10.45 - 11.25 New Tools for a New World
Nail Rogers - AstraZeneca - UK and Stephan Godwin - Taylor Nelson Sofres Healthcare - USA

The presentation reviews work ongoing to evaluate a range of possible research tools for the researcher, that will particularly apply to products arising from 'high technology', particularly biotechnology.

11.25 - 12.15 Challenges of the Future for Marketing Researchers - external/internal view

Barry James - Pharma Strategy - UK - External View
Kore Cashion - Novartis Pharma AG - Switzerland - Internal View
 A provocative look at the future for Pharmaceutical Marketing Researchers, what will be the major challenges ahead and how should they be faced.

12.15 - 12.30 Question and Answer session

12.30 - 12.40 Closing remarks - Uwe Hohgräwe - EphMRA President

12.40 - 12.45 Presentation of the Jack Hayhurst Award for Best Paper

12.45 - 14.00 Delegate Lunch

Disclaimer - EphMRA reserves the right to alter or cancel, without prior notice, any of the arrangements relating directly or indirectly to the event, for any circumstances beyond EphMRA's reasonable control

RESERVE PAPERS

The following is a reserve paper and will be included in the CD ROM of proceedings and may be presented at the conference if a speaker is unable to attend.

The 'Consumerisation' of Prescription Drugs

John Sinopoli - Consumer Health Sciences - USA - DTC and the Role of Empowering Patients to be Knowledgeable about, and involved in their Healthcare.

JANET WAGSTER CONSULTANCY (JWC) JOINS EphMRA FOUNDATION

"With my consultancy now 2 years old and continuing to develop in terms of skills, knowledge and experience available to the Industry, it now seems appropriate to join the Foundation. I believe that Market Research expertise has to be secured by harnessing the appropriate skills internally and externally within an organisation and knowledge shared is knowledge gained. Membership of the Foundation will help to keep my consultancy in step with the latest Market Research expertise, thereby enhancing the value of my consultancy to you.

Entering my 3rd year as a consultant, JWC continues to offer solutions for both Companies and Agencies. Examples of support available are: customer satisfaction / image / feasibility studies, market and competitor analytical reviews, evaluation of secondary information needs, competitive intelligence reviews and the provision of secondary information training courses".

JWC offers objectivity, flexibility and adaptability, with the ability to fill any shortfalls in your resources on a project-by-project basis. An understanding of the role and value of Market Research in the strategic decision-making / portfolio analysis processes based on a broad base set of skills. The ability to train and coach less experienced staff.

For more information, please contact: janetwagster@aol.com

News from Martin Hamblin GfK Healthcare

Martin Hamblin GfK Inc has recently appointed Susan Rosovsky as Director of the company's US "Domestic" Market Research area. Susan will be responsible for this latest initiative, building on the growing healthcare business which has focused on the USA market aside from the Global work conducted by the rest of the USA based executives and the large London based team. The company will be investing in more staff to cope with the growing array of products and services emerging from the GfK group and from external licensing opportunities. Susan has had over 16 years experience working in the USA at such leading companies as NPD and Greenfield-On-Line in developing the custom based research solutions across a variety of market sectors including healthcare.

MH GfK Inc has also recently promoted Monique Rinner and Jila Bick to International Research Director status and Gustavo Gurrieri to International Research Manager (Statistics) at the company's Connecticut and Grafton Mass operations.

The Healthcare group in London recently acquired the PMSI Market research group from IMS and this has expanded the company's services offered to the UK Healthcare based companies. The services include advertising tracking procedures including MARS, the important UK omnibus with GPs- GENERATOR as well as specific qualitative research procedures. The company's parent operation GfK also acquired the Business Division of IMS Health UK and Ireland which provides services to the veterinary business area. The core feature of the operation is the retail panel that records details of virtually 100% of veterinary products purchased from all companies involved in this market sector in the UK and Ireland.

Service News - Networked Pharma Pharmaceutical M&A unsustainable - peers must work together to gain market share

Datamonitor's latest research initiative - Networked Pharma: Innovative strategies to overcome industry margin deterioration - shows that pharmaceutical R&D and sales productivity is declining. The industry's preferred strategy to maintain growth has been to invest more in current business practices, most dramatically via M&A. However, Datamonitor's analysis of the relationship between company size and productivity for all leading companies suggests that there are no, or negligible, economies of scale in either sales or R&D operations. The implications of this are clear: company size is not an advantage in creating value for shareholders.

Transforming the business model - networked pharma

A new approach will need to emerge to ensure continued success. Datamonitor presents a networked pharmaceutical business model: a flexible, rapid and radical alternative strategy to M&A or organic growth, in which capabilities and scope increase without extensive ownership of physical resources, intensive post-M&A restructuring or corporate bureaucracy. The new breed of networked pharma will grow by downsizing. It will keep in-house only the intellectual capital that is critical to its competitive advantage and outsource the rest in the form of temporary and long-term strategic alliances with peers and vendors. It will succeed because specialist vendors and (bio)pharmaceutical companies are now arguably more efficient and progressive at what they do than are many pharmas. As Jennifer Coe, Strategy Director, comments: "Future pharma will be about health networks not health companies. In 2015, networking will be the industry's preferred competitive strategy, with peers working together to gain market share".

Personnel News

Datamonitor: John Ensign, JD, M.P.H. is the Lead Analyst of Datamonitor's Immune Disorders and Inflammation Business Unit. Prior to joining Datamonitor, Mr. Ensign was Senior Analyst at a leading pharmaceutical industry market research firm and consultancy. Mr. Ensign was formerly employed in the capacity of Regulatory Counsel in the Office of the Commissioner at the U.S. Food and Drug Administration. He was awarded a Master of Public Health degree from the University of North Carolina, Chapel Hill and a Juris Doctorate from the New England School of Law located in Boston, Massachusetts.

MEDI-PRAGMA STRENGTHENS INTERNATIONAL OPERATIONS

As of April 2002 Dr. Andrea Parodi joined Medi Pragma in the International Department. Dr. Andrea Parodi obtained a scientific degree (Molecular and Cellular Biology) from the University of Rome "La Sapienza"; he has been working in the pharmaceutical field since 1992 and over last four years, has been employed at Pfizer Italy being in charge for the following positions: Clinical Trial Coordinator, Market Researcher and Business Development Product Manager. Andrea's deep knowledge and professional experience in three different areas (Medical, Marketing, Business Development) will contribute to strengthen further the company's International Department and develop high and strong relationship with our European Clients. Medi Pragma believes that Andrea's professional experiences will be helpful to better understand and cover the request and needs of Clients, being a strong asset for meeting total customer satisfaction.

Agency Foundation Members 2002

The following agencies have joined the Foundation since the membership year started again in October 2001:



Radmos Ltd



Other agencies joining are:

Arpo, Quality Medical Field, I+G Nürnberg, Jan Schipper Compagnie