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EphMRA NEWS

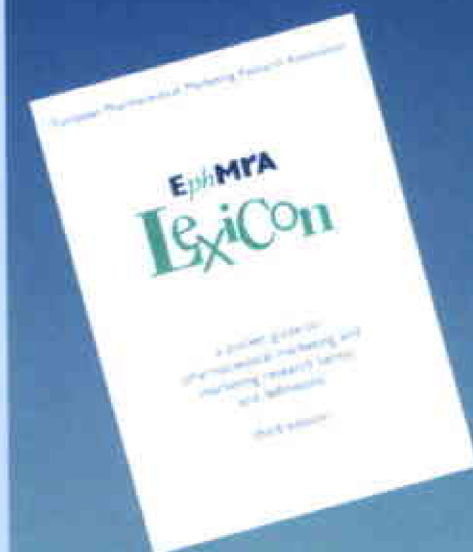
EUROPEAN PHARMACEUTICAL MARKETING RESEARCH ASSOCIATION

Issue: April 2003

The approach of Easter brings us to focus, once again, on our annual conference - this year in Madrid at the Melia Castilla Hotel. Full details are on our web site at http://www.ephmra.org with on-line registration fully available. We have a comprehensive programme of training courses in Madrid as well as an exciting conference programme. With regards to the EphMRA News, we are featuring here details of the Associate members who have joined so far plus feedback from the first agency Associate members meeting in January.

Many thanks
Bernadette Rogers
EphMRA General Secretary

EphMRA Lexicon



A completely revised and updated Lexicon will be available in June 2003. This new edition has been overhauled by the PRM&T Committee along with the Foundation Board

Strategic Business Analysis Committee

This is an important area for development for EphMRA and the aim is to initiate more frequent and proactive meetings. Anyone from Full or Associate member companies interested in activity joining this committee and attending a meeting then please contact EphMRA (MrsBRogers@aol.com).

2003 Conference and Training Diary

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

5-6 November - Brussels, Belgium. Using and Understanding Desk Research

CONTACT US

By phone, fax or email...

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

Facts & Figures
about the Newsletter publication

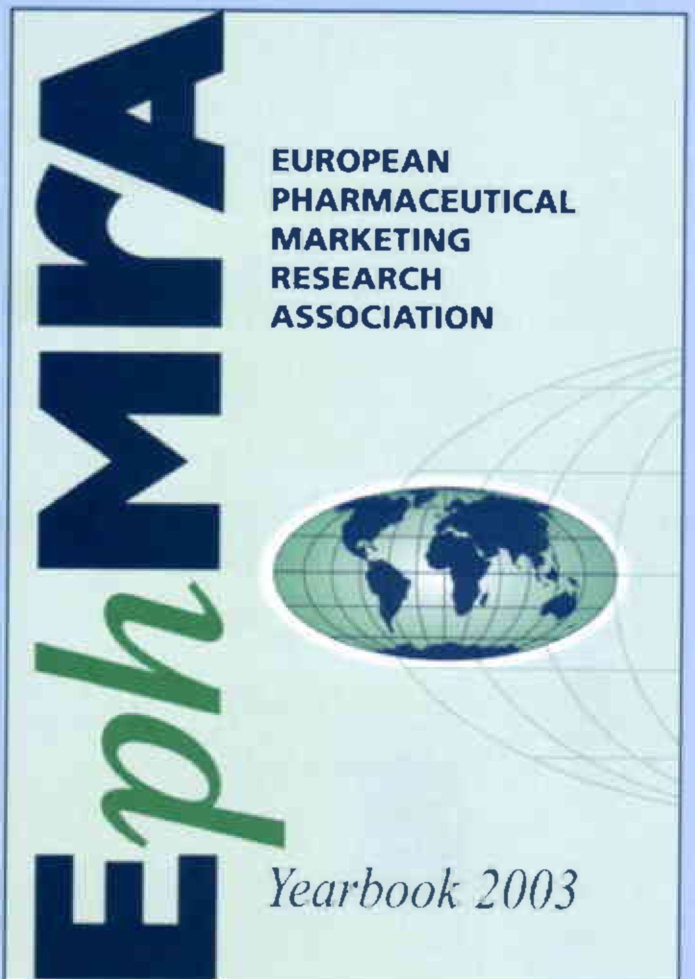
Copy/Advertising Deadline: May 15th 2003.
The next EphMRA News will be issued in early June 2003.

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 2003 Yearbook will be distributed at the Madrid conference or mailed out after if you are not attending

MUSING ON MODELS 3

Dear Colleague,

Just as the boundaries of Time series Forecasting and Modelling are unclear, so too are the boundaries of Modelling and Marketing Research Analysis. Each time you analyse a quantitative survey you are in effect creating a model of the market, and using one of the Data Driven modelling techniques. However, we are going to consider those that have a significant usage in the development of models rather than the more usual forms of analysis. We will look at three groups

Discrete Choice Models
Promotional Response Models
Statistical Models

It has frequently been said that the Pharmaceutical Industry is rich in data. This is, indeed, true. However, this richness also has considerable disadvantages. The multiplicity of data sources frequently provides a multiplicity of results based upon the same measure. This variability becomes an issue when developing a data driven model and you should bear in mind two important facts.

1. Use the data that is most suitable for the purpose.
2. Remember even audits are subject to error and are only the best estimate within a normal distribution, driven by the sample and collection methodology.

Over many years I have used the term "consistent inaccuracy". This is meant to indicate not that the audit (or survey) is inaccurate, but rather that the error is consistent and in the same direction. Obviously the less the error the more comfortable the data is in normal use, but when modelling the consistency is equally of importance. This is also true when examining a trend, which itself is a very simple model. Given consistent inaccuracy the choice of data should be based upon suitability for purpose. As a modeller this means that you have a duty to understand how the data in audits are collected and what the supplier is attempting to provide within the audit. This understanding may give access to data that is within the audit but not published e.g. daily data in a diagnostic audit. In the case of a quantitative survey this data requirement should have been included in both the sample and questionnaire design.

Discrete Choice.

It is not my wish to enter the Discrete Choice debate, others are better qualified than myself to do this. However, the development of the model of the output from a CBC study provides a real opportunity to gain additional understanding of future product performance.

Let us consider the research technique against our two tests in the reverse order.

1. Accuracy

Accuracy is dependant upon two elements - the sample size and the number of attributes and levels under test. The number of attributes and levels should drive the sample size, which also should consider the number of sub-cells to be analysed. Failure to power the research correctly is the most probable cause of poor results from this kind of research.

2. Suitability for Purpose

The value of CBC is the basis of the debate around this methodology. However, the debate concentrates on the technique and NOT on the suitability for purpose. The main value for the modeller in the technique is the ability to develop utility scores for the attributes and to be able to compare these across the test products. These utility scores are far more flexible than attribute scores obtained by more simple methodologies, which we will discuss when considering Attribute Dynamic Models.

The other major objection to CBC is that it develops a Preference Share and not a Market Share. This is true, but the experienced agencies have developed methods to deflate this with an acceptable degree of accuracy, and this can be further validated when a model is being developed from the results.

A more serious objection would be that the research was conducted some twelve weeks earlier and that the results are to be applied possibly three to five years into the future. The implication is that the market will have changed and that the research results will no longer be valid. This can be said of almost any projective research, but if we consider the alternative methods of projecting the potential share to be obtained by a new product they are all equally fallible on this score without the flexibility advantages of CBC.

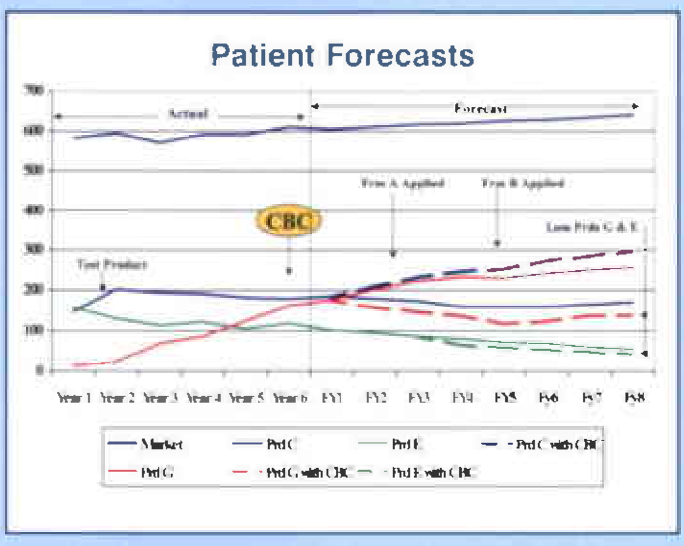
Finally, what does the share developed in CBC really estimate? It could be preference share, alternatively a market share or even an intention to try share. A case can be made for each of these, however in the model it can be used as a market share under the consistent inaccuracy rule but this can be controlled within the model. In a similar manner the share can also be considered to be a maturity share within the model.

Using CBC within a forecast model.

Having considered the CBC study and accepted it as suitable for purpose, a forecast model can be developed. This is most likely to be considering new products in late Phase II of development. The model will consist of a combination of epidemiological, audit and surrogate data in addition to the CBC.

As with all models it is always of value to include historical data, but in this case the history will be used to validate the model accuracy. A source of prescriptions/patients will be identified for inclusion within the model. This will allow a historical sub model to be developed validating the relationship between treated patients and number of patients treated on individual products. Given this information the true market shares can be calculated and a deflation factor created to bring the estimated share within the CBC back to that of the real market. Examining this comparison over many years the accuracy of the deflated value produced by the research agencies has been impressive.

The current market is then trended out into the future and the CBC model is added in at a period of time when the test product would meet maturity. At that stage the full flexibility of the CBC model can be applied to the forecast model, modifying the existing product in the market in addition to the test product. Surrogate adoption curves can be added to the model for the test product and these can also interact with existing products in line with the CBC output.



The chart above illustrates an additional gain from the development of this type of model. One of the main values of the CBC technique is the ability to examine a range of possible product scenarios. The model can allow these to be added to the marketing of the product in a range of orders, and time intervals, to calculate the optimal overall effect upon the product, based upon the results from the CBC.

This added value use of the basic CBC provides a powerful scenario development model for planners in the NPD sector, whilst making maximum use of your established research data.

Next time we will look at promotional response and statistical models.

Regards

Terry Hardy
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THE TERRITORY AS A BUSINESS DECISION TOOL

1. Summary

The ANTEO[1] project collects a number of methodologies and statistical techniques for territorial analysis, born whilst actively working on business needs. Many companies monitor their own market following geographical partitions which differ from the current administrative ones, thus obtaining a new geographical reference through the creation of specifically peculiar territories. This is how it has become possible to represent reality and transform data into information in different ways. Geo-potential applications allow a more subtle territorial detail than ever before and have found successful application within the Italian reality.

2. Corporate objectives analysis

A correct definition of corporate objectives allows the consequent determination of the appropriate operative aspects and the necessary resources required to carry these out. Hence, attention will focus on the Company's ability in partitioning its specific geographical area into territorial typologies, linked to sales objective potential. The goal of geo-potential analysis is to trigger a virtuous sequence, starting with the segmentation of the territory, followed by greater business efficacy in terms of operativity and pressure on customer satisfaction, ultimately leading to brand or product loyalty. Such a customer-centric approach should increase investment profitability and induce business operations to be also led by this approach.

There are two major information channels related to corporate staff activity on the territory: field data, i.e. fieldforce feedback, and company data, i.e. stored information regarding all corporate activities relating to the field.

Both these channels generally feed a data warehouse which becomes the base for the ANTEO project implementation. The operative territorial analysis develops in at least two main directions:

- an administrative one, to be read bottom-up, starting from local business territory, up to provincial, regional and finally country-level extension;
- a business one, focused on lines and area managers.

3. The operative approach

Having chosen a reference territorial model where the business territories - related to agents or to other operative staff directed by Area Managers directly reporting to the Sales Director - act as terminal elements, the research for potential data sources is followed by exploratory investigations aimed at selecting the data model to be used in the data mining process.

Having defined the thematic areas of the variables and the rules allowing a univocal relationship to be established with the examined territory, the figures' space and time environments are determined. When the reference segmentation is confirmed, the market figures are cumulatively collected on a mobile yearly basis, while the figures in use refer to the last month of the reference year. The potential relationship among available variables in the data model can now be looked at and prepared for analysis and modelling.

Management and comprehension requirements, along with the existing bonds, drive the choice within the universe of analytical techniques, as follows:

- descriptive, through decision plans and parity diagrams;
- factorial, to define potentiality indexes;
- typological, to define territorial patterns.

The market potential evaluation (R. Benedetti, G. Espa 1997) of the different areas within which the Companies act, represents one of the basic references to define business strategies and operative plans, as for example (A. De Luca,1984):

- Definition of the volume of production
- Definition of sales objectives
- Rationalization of the distribution system
- Sizing of the sales force
- Allocation of advertising investment

It is worthwhile remembering that the market potential is a theoretical indicator of the demand under optimum conditions and in a precise situation identified by the available information in a specific moment in time. In this way it differs from the market demand, a more realistic figure. The market potential is calculated following two main methodological directions that focus on:

- Indicators
- Functional relationships

The first method is generally used to measure **indirectly** the territorial **potential** (IP), involving indicators that describe the territorial features linked by a weighted relationship, thus establishing equivalent or different weights between items.

$$IP_i = \sum_{j=1}^{m} \pi_j X_{ji}$$

Where:
π= weight; X= variable
j=1... m weights and variables; i=1... n territories

A 'neutral' feature may be selected in choosing the weights by using factor analysis and identifying the subtended relationships between indicators, though a possible loss of information may occur in case we decide to consider, for example, only one of the resulting factors (IPF).

$$IPF_i = \sum_{j=1}^{m} \phi_j X_{ji}$$

Where:
ϕ= factor score coefficients; X= variable
j=1... m weights and variables; i=1... n territories

The second method, generally used to measure directly the relationship among the variables describing a territory, hypothesizes a cause-and-effect relationship to describe the territorial potential, by using regressive methods, generally backward or forward stepwise systems (IPY). An example can be found in the following cross-section model:

$$IPY_i = \sum_{j=1}^{m} \beta_j X_{ji}$$

Where:
Y= dependent variable; ß= coefficients; X= variable, being i=1,...,j,...,n
j=1... m weights and variables; i=1... n territories

4. Operative territorial analysis
The proposed approach follows both methods defining three weighted models:
- Attack
- Maintenance
- Defence

The attacking model defines, on the basis of corporate strategy, the short-term future strategic factors and assigns a higher weight to these variables.

The maintenance model, which is descriptive, assigns the weight derived from a factor analysis to the variables.

The defensive model defines, on the basis of corporate strategy, the leading existing market strategic factors, and assigns higher weight to these variables.

Geo-marketing tools also allow the creation of tailor-made applications based on isochronous and equally distant gravitational areas. The consistency with the corporate business expectations is generally measured through a cluster analysis.

The definition of the rules for the customization and delivery of the data mining solution, such as database scoring and marketing lists, is determined according to the level of systems usage, information usage or both: this affects the Marketing, Customer Care and Operations' management.

As far as the IT systems are concerned, the Headquarters retains strategic and decisional functions, dedicated to the sales force on demand. Information: the Headquarters retains dedicated strategic and decisional functions while the sales force deals with the tactical and managerial supports via the Internet.

5. Development opportunities
The applications based on the union of geo-data and potential measure (geo-potential), allow an enhanced territorial description creating a new market-monitoring referential geography.

The ANTEO project aims at offering operative solutions to company decision-makers, that is to say the most appropriate tools to seize market opportunities. The combination of data mining tools, geographical representation and tools that allow to share channels such as the Internet channel is a proposal to increase the integrated use of instruments and methods.

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6. References
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[1]ANTEO, mythological figure: the Lybian giant, son of Gea and Poseidon, could not be defeated if in contact with Mother Earth. The company with an in-depth knowledge of its territory can enlarge its possibilities of 'survival' and exploit the opportunities thrown up by the market.

Recruitment:
EphMRA Treasurer
Position Vacant

EphMRA is seeking to appoint a new Treasurer when Dick Beasley retires in September this year.

Responsible for financial welfare of the Association. This routinely involves signing cheques, bank drafts, etc. However, the preparation of these financial documents plus invoices and such as debt-chasing letters, is handled by a suitably qualified external accountant.

All book-keeping also done by the external accountant. Requires 1 meeting per year, usually Dec/Jan, to review accounts and prepare for submission to external auditors.

The person does not have to be a qualified accountant, although an appreciation of financial control is essential, as is complete integrity.

Member of Executive Committee. Although no voting rights, full participation in all discussions, not just those involving finance, is encouraged.

Attends the 4 yearly Executive committee meetings - 3 x 1.5 day meetings during the year and one during the AGM conference.

Preparation and distribution of Annual Report together with a short slide presentation at the AGM.

Liaison with the Association's bankers, UBS in Switzerland. In addition to the usual cheque and savings accounts, the Association also holds some investments in Swiss AAA Bonds. Advice on the purchase and selling of these is available from the UBS.

Two year term - office commences 1 October and finishes 30 September 2 years later.

A non-remunerated position with applications invited from pharmaceutical company persons.

Contact EphMRA General Secretary
MrsBRogers@aol.com

Recruitment:
Chair of EphMRA New Form Codes Committee
Applications Invited

EphMRA is seeking to appoint a new Chair of the NFC Committee.

The work involved is approx 5-6 days per year:

- Reviewing and Approving Form 10s
- A face to face NFC Committee meeting at the AGM
- Meeting with Executive Committee and making the AGM Presentation
- Review of meeting minutes, preparation of reports, presentations to AGM and replying to NFC enquiries. A non-remunerated position with applications invited from pharmaceutical company persons.

Contact EphMRA General Secretary MrsBRogers@aol.com

Thanks to the Former Members Council of EphMRA

28 November 2002

Letter to: Former Members Council (FMC) - Mr Rainer Breitfeld, Mr Bernd Grobe, Mr Mike Brew, Mrs Janet Wagster, Mrs Janet Henson, Mrs Nicolette Huiskes

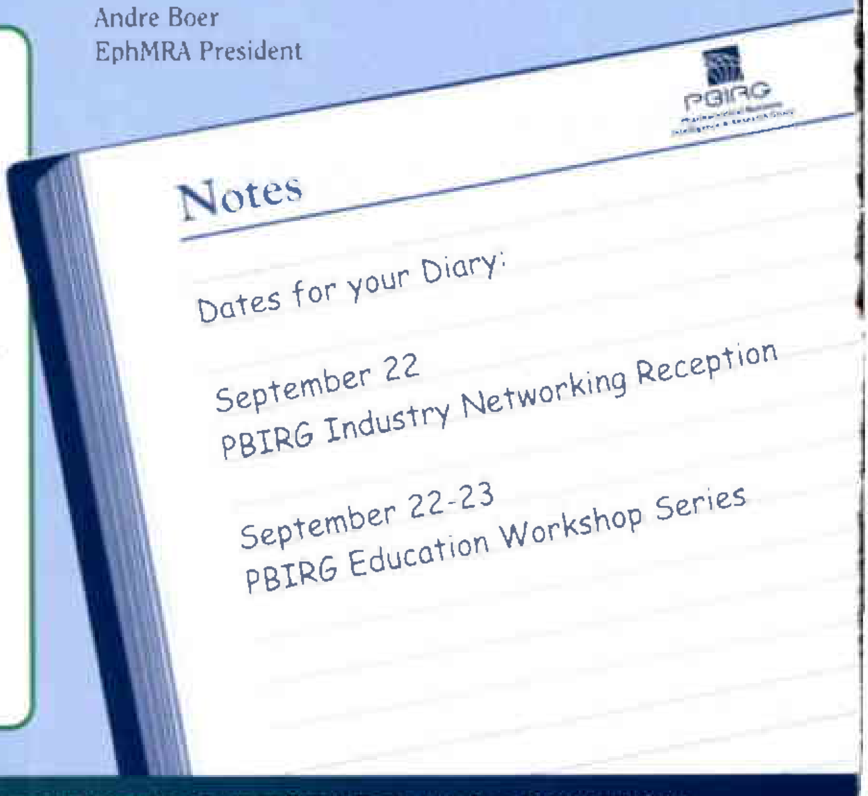
As you know at the AGM in June this year the EphMRA statutes were positively received by the Full members to allow Associate membership status in EphMRA for agencies. This was an enormous step for EphMRA but one which we believe will help equip the Association for the next 40 years.

None of this change would have been possible without the. Support, thinking, input and dedication of the Former Members Council. As a member of this, I would like to personally thanks you for your role in the FMC on behalf of the Full members, especially as it was done on a voluntary basis. The Executive committee certainly appreciated the FMC's regular meetings and the challenging way in which they addressed fundamental aspects of the EphMRA Statutes and provided actionable solutions.

At the moment the work on the statute review and Associate membership has drawn to a successful conclusion and we would like to ask all members of the FMC to now take a well earned break. Should other important issues come about which could also be addressed by the FMC then we would hope to contact you again to see if you can assist EphMRA once more.

For the time being, once again many thanks for your support which has been much appreciated.

Andre Boer
EphMRA President



How can you estimate the Optimal Marketing Mix?

The pharma industry has rightly become pre-occupied with "return on investment" from marketing activities. The key to estimating this is simple and well established but seldom used.

What is the marketing mix

Your marketing mix is all the marketing media you use (reps, ads, mail, conferences etc etc) and the amount you spend on each of these.

Are the returns from each medium the same?

No. Some media are more effective early in the product life cycle (meetings) and some are more effective later in the product life cycle (ads). Also, some media are more effective for new categories (seeding studies) and some for me-toos (reps).

So, why not spend all your money on the single most effective medium?

The simple answer is "the Law of Diminishing Returns". The more you spend on a medium, the less return you get with each additional dollar spent. So, the medium that offers the highest returns as you spend your first few dollars, will - as you spend more and more on it - fall from first place. It is then time to start spending on the number two medium. Let's look at this graphically. We will consider just two media - reps and ads - and ignore the interaction between the two...

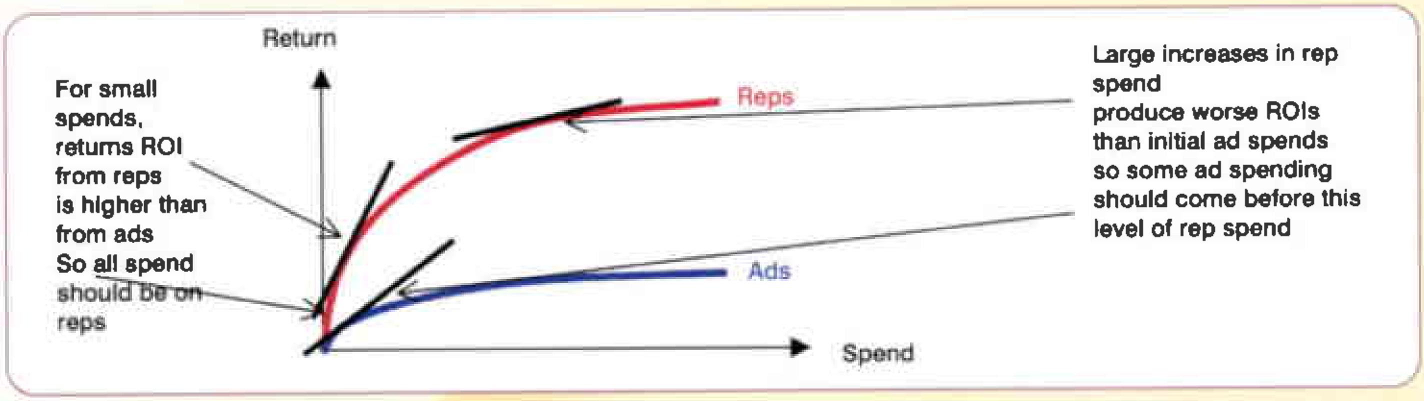
(The mathematically inclined among you might realise that the optimal marketing mix involves setting the spends such that the slopes on each curve are the same.)

But how do we know what the shape of the response function is for each medium?

This time there are three answers: experiments, econometrics and estimates. A large number of market experiments have shown - beyond any reasonable doubt - that the response curve for a marketing medium is concave (i.e. like the ones sketched below)(1). With econometrics, we look at past media spends and resulting sales patterns and try to infer mathematically how steep each medium's curve is for each of your particular media. With estimates, we look at things like the cost per exposure and quality of exposure for each medium and use this to estimate the steepness of the medium's response curve.

Are such models very accurate?

Not *very*. They require estimates and/or assumptions. However, they make the marketing mix planning process rigorous and transparent and prevent egregious errors. *(Like spending all your money on a medium which - when you come to think about it and look at the evidence supporting it - offers very little "bang for your buck").*



Gary Johnson
Inpharmation
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Reference

1. Johnson, G., Evidence Based Forecasting for Pharmaceuticals. 1999, Henley on Thames, England: Inpharmation.

NOT AN EASY JOB - YOU'LL NEED PATIENTS...

'Thinking of your last patient for HRT, doctor, was she aged around 50, found it difficult coming down the stairs in the mornings and generally had limited energy to get her through the day?' How many representative details start using similar words - perhaps applying to this or any other therapy area? Most Company representatives will work out for themselves that this is a good 'opener' helping the busy physician form an image of the patient their new wonder drug is designed to manage.

And most marketing professionals will facilitate this introduction by developing a range of patient profiles covering the therapy areas in the first three slots...

But do we really limit the development of patient profiles to the hectic period in the year before launch - only to be reproduced 'almost mechanically' during each and every detail thereafter? I think not. Patient profiles can and should be used throughout the development of all drugs - right from day-one!

Most of the above relates to Phase III where the focus is on the development of marketing strategies generally and in promotional planning specifically. The rather depressing images of sick patients so common in advertising many years ago have now (thankfully) been replaced by images of healthy 'successfully-treated' people doing the sorts of things that healthy people like to do.

Further back during Phase II patient-derived information is essential to forecast the likely demand for your brand and as input to cost-benefit analyses. It's not just numbers of patients either - you will need to look at the unique features of your brand and check them against market needs. So consider patient age differences, sex differences, effects due to location, severity of symptoms, compliance for medicines currently available and what the patients themselves would like to have in a new brand for their condition.

Still further back in Phase I the requirement is to identify unmet needs, and to facilitate the evolution of brand concepts as potential additional benefits are recognised during early drug development.

So how and where do we find this information? Experienced patient interviewers are hard to find - but are important if the topic is sensitive in nature. The key here is 'listening' and not 'interrogation'.

Qualitative techniques tend to predominate initially - although quantitative methods are needed for any forecasting or modelling applications. Interviewing in a group or individually will depend upon the sensitivity of the topic, the required interaction of like-minded sufferers and the geographic density of the patients.

So we ignore patients at our peril. As we follow the treacherous road from drug discovery to launch we know that it will not be easy - but after all 'patients is a virtue...

Ian Dunham
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Janet Henson - hensonschnee@bluewin.ch

WE NEED YOU - Call for members - we have vacancies for Full EphMRA company members to join the committee - Please contact Janet Henson or Bernadette Rogers - or see the EphMRA website for an application form.

UP AND COMING COURSE - NOTE IN YOUR DIARY - REGISTRATION MATERIALS ON EphMRA WEBSITE

November 5-7th 2003 - Introduction to Pharmaceutical Marketing Research Course - at the Sheraton Hotel and Towers - Brussels - Belgium

EARLY FEE CUT OFF DATE 1 AUGUST 2003

Course Aim

At the end of the course all delegates should have a basic grounding in the course topics outlined and be able to put into practice, on their return to their companies, much of what they have learnt.

Who should register for the Course?

The target audience for this basic course is those who have joined an international pharmaceutical market research department or agency within the last 12 to 18 months.

Course Convenors

The course is being convened by representatives from the EphMRA Primary Research Methods and Training (PRM&T) Committee: -

Xander Raymakers from NV Organon, The Netherlands
Baerbel Matiaske from GfK HealthCare, Germany
Ruth Evans from IMS Health, UK

Course Structure

The course will feature lectures and a high proportion of small group syndicate work. Thus delegates will have the opportunity to work on a case study and formulate market research plans through teamwork.

ANOTHER COURSE TO PUT IN YOUR DIARIES

November 5-6th 2003 - 'Using and Understanding Desk Research' - at the Sheraton Hotel and Towers, Brussels - Belgium

EARLY FEE CUT OFF DATE 1 AUGUST 2003

Introduction

In making decisions about which compounds offer the most promise pharmaceutical company executives usually need to understand market potential based on both primary research and desk research. Desk research information is varied and includes epidemiology data, doctor universe statistics, audit data, sales representative activity data, government information and other official statistics. We will be including in the workshop a review of desk sources.

Often the market analysis is required quickly, as with an in-licensing opportunity, so that timely decisions can be made. How can the analyst make the best use of his/her time in delivering the results?

This course is organised into five main sessions, the first looks at problem definition and clear objective setting and defining types of desk research and their utility. Session two looks at in-licensing desk research an important area for desk researchers currently, the third and fourth sessions then focus on the product lifecycle firstly New Product Development followed by Currently Marketing Products highlighting specific desk research needs and approaches within these lifecycles. Each section is very interactive and includes hands-on syndicate work.

There is such a vast amount of information available, particularly through the Internet, and information needs may cover a range of target groups. This course should help the pharmaceutical company analyst with these challenges.

Workshop Objectives

The key objectives of this workshop are:
At the end of the workshop, delegates will understand

- How to go about developing clear-cut objectives for a desk research project
- How to know which sources to use and to assess the value of each in a critical manner
- How to go about integrating the various information sources into a comprehensible and reliable market picture
- How to integrate primary and secondary research data

continued over >

Who should attend?

The course is aimed at experienced Market Researchers or Marketing personnel from pharmaceutical companies. Market researchers from agencies may find it useful to attend, but they should bear in mind that the primary audience is anticipated to be personnel from pharmaceutical companies. Anyone can attend, but EphMRA full and Associate Members have priority for places. Typically delegates would already have a basic understanding of desk research and would regularly be faced with a requirement to undertake or organize desk research projects. The interactive format of the workshop will allow for a maximum of 30 people to attend.

Course Convenors

The course is being convened by members of the PRMT Committee who are joined by Terry Hardy.

Semra Grundy - Allergan Ltd - UK
Terry Hardy - Radmos Ltd - UK
Peter Winters - MEDeFIELD - UK

JUNE 2003 - CONFERENCE WORKSHOPS TO REGISTER - WWW.EPHMRA.ORG

Tuesday 10 June - Value and Pricing: A continuous challenge

The workshop is being organised by the EphMRA Primary Research Methods and Training (PRM&T) Committee, and will be convened by Catherine Franeau, UCB Pharma, Belgium, Cathy Clerinx, Adelphi International Research, Belgium and Stephen Grundy, Martin Hamblin GfK Global Healthcare, UK.

Workshop Background

Pricing and value are increasingly viewed to be closely intertwined. This poses challenges for marketing and marketing research. A multitude of target audiences has to be convinced of the value of a product, each with its specific arguments. Payors often remain an elusive target audience with sometimes-mythical dimensions. Healthcare systems never cease to evolve.

EphMRA's Primary Research Methods and Training Committee believe it is time to provide an update of these issues, and to stimulate a debate on the different aspects of pricing and value, and its implications for the marketing research community.

Workshop Objectives

The key objectives of this workshop are:

- To review the drivers of price and value in pharmaceuticals
- To provide an update on the healthcare systems in the main markets
- To discuss the implications for marketing
- To evaluate the implications for marketing research

At the end of the workshop all delegates should have a basic grounding in the workshop topics outlined and be able to put into practice, on their return to their companies, much of what they have learnt.

Who can and should register for the Workshop?

The workshop aimed at product managers, marketing managers and both junior and senior researchers from pharmaceutical companies or agencies.

Programme

1030 - 1045	Introduction - Objectives of the workshop and Coffee
Session One - Setting the Scene	
1045 - 1115	Pricing and Value: different but linked concepts - **Cathy Clerinx - Adelphi International Research - UK**
Session Two - Changing Healthcare Systems: Structures and decision makers to influence	
1115 - 1135	France - **Jim Furniss - Bridgehead Technologies Ltd - UK**
1135 - 1155	Germany - **Marc Van Tendeloo - Contingo Consulting - Italy**
1155 - 1215	Italy - **Marc Van Tendeloo - Contingo Consulting - Italy**
1215 - 1235	UK - **Jim Furniss - Bridgehead Technologies Ltd - UK**
1235 - 1300	USA - **Mark Nissenfeld - Ziment**
1300 - 1400	Lunch
1400 - 1445	Different Healthcare systems: commonalties and differences - implications for pricing and value - **Brian Lovatt - Vision International Healthcare Research - UK**
Session Three - Implications for Marketing Research	
1445 - 1530	Changing paradigms in pricing and value research - **Bill McKenna - Strategic Marketing Corporation - USA**
1530 - 1545	Coffee
1545 - 1615	Identifying and measuring the brand value drivers - **Steven Grundy - Martin Hamblin GfK Global Healthcare - UK**
1615 - 1715	Syndicate exercise followed by debate: - Do physicians still have a role in pricing and value research?
Section Four - Determining the value of the brand	
1715 - 1745	How to market the value of the brand to payor audiences - a case study - **Paul Thomas - Adelphi Group - UK**
1745 - 1800	Conclusions and wrap-up
1800	End of Workshop

ALSO!

Tuesday 10 June - Brand Equity Measurement

The workshop is being organised by the EphMRA Primary Research Methods and Training (PRM&T) Committee, and will be convened by Bob Douglas, Taylor Nelson Sofres Healthcare, UK, Jeremy Lonsdale, Aequus Research Ltd, UK and Kurt Ebert - F. Hoffman La Roche, Switzerland.

Workshop Background

Establishing a strong brand is essential to building and maintaining a solid customer base. Building and maintaining brand equity is at the core of modern pharmaceutical marketing.

Measuring brand equity allows companies to define a brand's core value to customers and which characteristics are driving value. Once a baseline is set it is important to track changes in its brand equity over time. Changes in the quantitative measurement of brand equity will enable companies to assess the value of their brand investments thus helping them to set marketing and management priorities. Brand equity measurement has been a cornerstone of consumer research activity, but as yet has not been fully adopted by the pharmaceutical industry.

Workshop Objectives

The workshop will address the essential questions around brand equity research measurement

1. What is brand equity?
2. What contributes to my brand's equity?
3. Why Measure Brand Equity?
4. How do I measure brand equity?
5. How do I use brand equity to my advantage?

Who can and should register for the Workshop?

The workshop is aimed at experienced Market Researchers, Business Analysts and Marketing Personnel from companies and agencies that are involved in brand assessment either at the NPD phase or in post launch evaluation.

Programme

1030	Welcome and Coffee
1030 - 1115	What is Brand Equity? - **Barry Gowers - Tonic Health Ltd - UK**
1115 - 1200	Breakout Session to Discuss Relevance to Pharmaceuticals
1200 - 1215	Feedback
1215 - 1300	Using Qualitative Research to Understand Brand Equity - **Sue Christy - Taylor Nelson Sofres Healthcare - UK**
1300 - 1400	Lunch
1400 - 1420	Overview of Brand Equity - **Bob Douglas - Taylor Nelson Healthcare - UK**
1420 - 1505	Brand Equity Models - Part 1 - **Jannie Hofmyr - The Customer Equity Company - South Africa**
1505 - 1550	Brand Equity Models - Part 2 - **Clement Galluccio - RxMark - InterbrandWood - USA**
1550 - 1630	Breakout Session with Coffee
1630 - 1730	Brand Equity Tracking - **Sylvie Cloarec - GfK HealthCare - Germany**
1730 - 1815	How do I use brand equity tracking to my advantage - **Michael Owen - Context Research International - UK**
1815 - 1830	Open Forum: 'Brand Equity Tracking, getting it right'
1830	Close

COURSES IN THE PLANNING PHASE
watch the web for more details

POSITIONING - GETTING IT RIGHT - EARLY 2004

Positioning is 'The act of creating an image of what a product can offer and to whom, so that it will occupy a distinct and sustainable competitive position in the mind of the target consumer.' - EphMRA Lexicon.

Few terms cause as much debate in the industry as positioning. What exactly is positioning? How is it defined? At what stage in the development cycle should positioning start? What are the responsibilities of headquarters vs. local affiliates in positioning? And, last but not least, how and when should positioning be generated and tested?

EphMRA's Primary Research Methods and Training Committee feels it is worth revisiting this important topic in a dedicated workshop, and to bring together experienced marketing research professionals and experts to discuss these issues.

Workshop Objectives

The key objectives of this workshop are:

- To exchange opinions on the terminology and process of positioning
- To learn about the process of positioning through case studies, and to illustrate the context in which positioning takes place
- To learn about the latest techniques used in positioning research

THE RESEARCH TOOLBOX - AUTUMN 2004

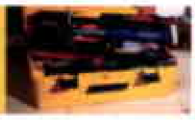
Course Aim

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

COURSE FEEDBACK
The Research Toolbox



The Research Toolbox - November 6-8 2002 - Review of course - by convenors Bob Douglas of Taylor Nelson Healthcare and Catherine Franeau of UCB Pharma.

The Research Toolbox was a new training workshop run by the PRM&T Committee in November of last year. It was designed as an intermediate course as a follow on to the Basic skills course. Issues covered included questionnaire design, analysing, interpreting and presenting data, sampling theory as well as others. 31 delegates attended the course in Brussels feedback has been extremely positive.

One key theme running through the whole workshop was base everything you do on well defined and agreed objectives. This may seem an obvious thing to say, but very often ill-defined objectives leads to vague and unactionable results. Clear objectives are not just important in translating research objectives into methods, but also in questionnaire and discussion guide design, and analysis and presentation of results.

Likewise, good communication was an occurring theme, which was stressed in terms of managing clients' expectations, the agency client partnership, and project follow up.

Delegates had the opportunity to discuss research topics via the breakout syndicate sessions, which included the chance to 'experience' projective techniques first hand in a group discussion setting.

Emphasis was also give to process in research, with particular reference to qualitative research. Whilst qualitative research is by nature unstructured and flexible the process by which information is collected and analysed is paramount.

Other interesting topics covered included mapping techniques and sampling, which was refreshing to see on a pharmaceutical course as particularly the latter is often neglected.

Delegates were given a clear understanding of the need for good sampling practice, and the pros and cons of each approach. Differences across countries were discussed in terms of the various healthcare structures and the impact these could have on research. Again, a topic, which is important in the design of projects but is not often included in workshops.

Finally, alternative data deliverables were discussed. These ranged from the more traditional paper tables to the various online options which are now increasingly used.

Overall a packed programme, lots to take in and take back to the office. Feedback was extremely positive and I'm sure it will become a regular item on the training programme.

Bob Douglas and Catherine Franeau

Shaping *the* MR Puzzle

The conference is the high point of the EphMRA year and provides an invaluable opportunity to keep in touch with where our industry is going. The EphMRA conference is renowned for providing a programme of distinguished calibre speakers delivering papers of high quality. This conference is not just about listening to high-level speakers from across the industry; it's about interacting with them. As well as networking opportunities there are topical papers, interactive sessions, where you will have the opportunity to question the experts and a one-day agency fair, making the conference the most important event in the Pharmaceutical Marketing Research Calendar. The EphMRA agency fair is a unique platform for agencies to reach their audience and demonstrate their contribution to pharmaceutical marketing research. The popular Pre-conference interactive workshops topics this year are Brand Equity Measurement and Value and Pricing - a Continuous Challenge, which address and tackle key issues and implications for Marketing Research.

The conference theme centers on the changing Healthcare industry. We should not feel powerless in the face of change. The future is for us to shape and we can have control over how the pieces of the puzzle are assembled, using information as a powerful tool to help our companies build commercial success.

Session One will aim to help us determine and define the most significant factors that are changing or about to change our external and internal environments, forcing us to re-shape our thinking and working practices.

Session Two will concentrate on the future shape of the 'Single European Healthcare System', 'The New Virtual Pharma' exploring deconstruction in the Pharma industry functions and 'The Multi-skilled Worker' and core competence of the future marketing research professional.

Session Three will look at 'Managing the Change' and the effect the myriad of possible alternative futures has on information overload, resourcing issues and ever increasing stress, whilst at the same time highlighting key generic issues. The objectives of this session are to provide key insights into the implications of these future scenarios on the MR executive's role.

Finally **Session Four** aims to bring the puzzle pieces together to generate creative ideas on how to start implementing change now. This session will provide the 'take home' actions from the conference.

Speaker Highlights - The conference features some of the most provocative thinkers

Kenneth Watson is currently Vice President of Global Marketing at Yamanouchi's Corporate Headquarters. Kenneth graduated from university as an MD with a specialization in Internal Medicine. After he joined the pharmaceutical industry, he held various senior management positions in R&D, Marketing and Project Management. In the course of his career he also graduated as an MBA. Until 2002 he lectured International Business Management at the University of The Hague in The Netherlands. Kenneth is a past winner of the EphMRA Jack Hayhurst Award.

Mike Owen has a social science degree from LSE and for past 15 years he has been Chairman of Context. Mike has been in charge of well over 600 projects in the pharmaceutical area in many therapy areas. This has included much work on global branding. He has written and presented at a range of conferences. In 2000 he was commissioned by SAGE (along with Jon Chandler) to write an authoritative book on 'Developing Brands through Qualitative Research'.

Jon Chandler is Managing Director of Context where he has been for last 16 years. Jon has a social science degree from Bedford College, University of London and over 20 years research experience. He has been in charge of over 500 consumer and healthcare projects. Jon has presented many papers/workshops on qualitative research.

Vivien Yule BA (Psych.) is a co-founder and Director of Ruston Poole, an executive search company. Vivien was previously a career pharmaceutical market researcher at Glaxo and was Managing Director of Louis Harris International Medical Surveys.

Colin Maitland is a highly regarded market researcher and is Chairman of Isis Research plc, which he founded in 1973, having previously worked as European Research Manager for Leo Burnett.

Graham Lewis is an economist by profession and entered the pharmaceutical industry in 1973. Graham has worked on all the major compounds launched over the past 20 years, in all major regions of the world. He has spoken at conferences in Western Europe, North America, Latin America and the Far East, including China, and is widely sought after for his strategic insights.

Richard Vanderveer has given nearly 60 presentations at major industry conferences. Richard is a consumer and industrial psychologist, with a career in the pharmaceutical industry spanning twenty-five years. Richard has created and run three companies: The Vanderveer Group (now TVG), Physician Micromarketing, Inc., and now V2, Inc where he is CEO.

Brian Lovatt - an International Health Economist with a broad base of expertise spanning across pharmaceutical research with over 26 years experience. Brian has worked in product research and development, sales and marketing, and health economics and pricing. Brian is acknowledged for his management of the creation and dissemination of socio-economic data focused upon customer needs, and innovative pricing strategies.

Stuart Cooper is Chief Executive Officer, Adelphi, his experience stems from both the consumer and pharmaceutical industry, in which he has held positions in international and national product management, market planning and marketing research. Stuart's career in the pharmaceutical industry commenced in 1979 and included international and national research management, and product management and marketing planning. Stuart has presented previous papers at EphMRA and PBIRG.

Stop Press - New This Year

- Discounted registration and agency fair fees for EphMRA associate members.
- The pre-conference workshops have moved to Tuesday and start at 10.30am.
- The agency fair is on Thursday morning 12th June opening at 10.00am. From 10.00am until 11.30 the fair is only open to all Pharmaceutical Company registered conference delegates and registered Agency conference delegates whose company has registered and paid to exhibit at the agency fair. Registered Conference Agency delegates whose company has chosen not to exhibit can attend the fair from 11.30 until it ends at 13.30. This new arrangement was the result of a survey amongst agencies.
- Sponsoring Agencies and EphMRA Associate Member Agencies will have priority for agency fair space allocation.

COME & JOIN US

Associate Members Committee: Inaugural Meeting

The first meeting of this Committee took place on 20th January in London and was attended by 11 associate members plus Bernadette Rogers from EphMRA. Prior to the introduction of Associate Membership research suppliers played a very peripheral role within EphMRA but now they have the opportunity of playing a significant part in the future direction of the organisation.

It was agreed that the primary role of the Committee should be to act as the voice of suppliers within EphMRA and that to be as effective as possible it should:

- Actively encourage as wide Associate Membership as possible
- Work to ensure that Associate Members are represented on all available committees
- Provide input to The Foundation Board for possible future projects
- Provide input to the Executive Committee on the format and all other matters covering the Annual Conference Agency Fair

It was agreed that all Associate Members should be invited to attend each Committee Meeting, but it was hoped that there would be a core of regular members to ensure continuity. This is an issue that will need careful monitoring over time.

The Committee would like to express their thanks to Bernadette Rogers for all her help in the meeting; to Martin Hamblin GfK for use of their meeting room and provision of lunch and refreshments and to Uwe Hohgrawe for his contribution via teleconference to the meeting.

Next meeting: March 24th at Martin Hamblin GfK offices in London, 10.30am-3.00pm. The meeting will be chaired by David Hanlon of TNS.

There will also be a meeting on Friday 13th June in Madrid 7.30-8.30am. All Associate Members will be welcome to attend both meetings.

Charles Ilsley
Ziment UK
charles.ilsley@ziment.com

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

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Martin Hamblin GfK Global Healthcare

Associate Members

The confirmed Associate members at the time of going to print are listed here. Other companies have also applied to join as Associate members since then and so we will include them in the next News edition.

Company	Key Contacts	Address
Able-Astor, Inc.	Tom Breslin Boris Stern	Able Astor Inc., 21021 Devonshire St. #206, Chatsworth, CA 91311, USA Tel +1 818 998-0255 Fax +1 818 341-5450
Specializing in medical market research for over 20 years. Able-Astor remains America's leading agency for domestic, international, and managed care projects		
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Adelphi International Research	Alison Geary Maria Karavali	Adelphi International Research Adelphi Mill, Bollington, Cheshire, SK10 5JB, UK Tel +44 1625 576 080 Fax +44 1625 577 300
Adelphi International Research	Cathy Clerinx	Adelphi International Research, 17 Place Bosch Wavre, 1300 Brussels, Belgium Tel +32 1023 1940 Fax +32 1023 1949
Aequus Research	Jeremy Lonsdale Julie Burs	Aequus Research, 39-43 Putney High Street, London, SW15 1SP Tel +44 20 8780 5959 Fax +44 20 8780 5925
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Datamonitor	Will Hsu Mark Meek	Datamonitor, Charles House, 108-110 Finchley Road, London NW3 5JJ UK
East to West Medical Market Research	Anna Vegremov	East to West Medical Market Research, 73-1425 Lamey's Mill Road, Vancouver, V6H 3W2, Canada Tel 1 604 461 6651 Fax 1 604 461 6650
English International Limited	Christine English	English International Limited, 15 Oakfield Road, Southgate, London N14 6LT Tel +44 208 886 1120 Fax +44 208 447 8500
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Jan Schipper Compagnie	Jan Schipper	Jan Schipper Compagnie, Albrechtlaan 3, Bussum, 1404 AH, Netherlands Tel +31 35 694 1199 Fax +31 35 695 3699
JW Consulting	Janet Wagster	JW Consulting, 22 Clare Drive, Tytherington, Macclesfield, SK10 2TX, UK Tel 44 1625 432 567 Fax 44 1625 432 557
A freelance expert in the utilisation of market research products, services & techniques in the healthcare industry with an ability to develop skills and knowledge across the industry within client companies and market research agencies/vendors		
Kendall Strategies	Robert Howard Deborah Geraghty	Kendall Strategies, 245 First Street, 14th Floor, Cambridge MA 02142, USA Tel +1 617 577 9031 Fax +1 617 494 8816
Kendall Strategies is a management consulting firm specializing in marketing and commercialization strategies for early-stage healthcare products and services		
I+G Suisse Health Research International	Bernd Grobe Eckbert Wundram	I+G Suisse Health Research International Kleinhueningerstr 179 Basel, 4057, Switzerland Tel +41 61 638 8001 Fax +41 61 638 8010
ims	Francoise Forissier	ims, 345 avenue Georges Clemenceau, Nanterre, Paris, 92882 France Tel +33 1 4135 1091 Fax +33 1 4135 1244
Martin Hamblin GfK	Angela Duffy Stephen Grundy	Martin Hamblin GfK 36 Smith Square, London, SW1P 3HL Tel + 44 20 7222 8181 Fax +44 20 7222 3110
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The Planning Shop International	Kim Hughes Jane Bryan	The Planning Shop International, CP House 8th Floor 97-107 Uxbridge Road, Ealing, W5 5TL UK Tel +44 208 231 6888 Fax +44 208 840 1040
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P\SL Research is a full-service marketing research agency and the global leaders in Internet Research pertaining to medicine		
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Companynews

Japanese pharmaceutical industry opens up to the benefits of market research

Market research has been slow to be absorbed into the marketing culture within Japan. However, there is evidence that this is changing, especially within the pharmaceutical field. This was demonstrated recently at a market research conference organised by TM Marketing in Tokyo and presented by Martin Hamblin GfK.

Allan Bowditch, Global CEO Healthcare and Steve Grundy, Joint Managing Director, gave a series of presentations demonstrating the market research tools which should be considered at key stages in a new product's development. The event attracted over 80 delegates from 40 different companies based in Japan - organisations represented included Yamanouchi, Fujisawa, Sankyo and Chugai, as well as Pfizer, Lilly, Merck and Wyeth Lederle. The feedback from delegates was incredible, with many requesting further events of this kind. Proof that market research is gaining recognition in the Japanese pharmaceutical industry as an important business tool.

ZS Associates

ZS Associates has appointed Brian LeFebvre as Manager of their European Market Research practice area. Brian's specific responsibilities are to further develop and manage the practice area in Europe. Brian will report directly to Dean Summerfield, Managing Principal of the company's London office. Commenting on Brian's appointment, he said: *"The value we can bring to our clients in many of our offerings, such as forecasting, sales force productivity, strategic marketing planning and CRM, is greatly enhanced by integrated fact-based customer insights. Brian brings a wealth of market research experience that will greatly strengthen our expanding European team."*

JW Consulting

The pace of change is accelerating! The business is continuing to face complex decisions relating to new product developments, new customers/markets, extensions to existing product uses and an ever-changing Pharmaceutical trading environment.

Market Research must respond to the demands of internal customers, whilst being faced with a number of complicating factors eg. information overload, assessments of relevant information, rapidly changing external markets, high staff turnover, low staff experience and constant requirements to generate added value outputs to support critical strategic decisions.

Using examples of best practice, training, mentoring, coaching and seeking peer reviews can achieve added value. JW Consulting can provide an experienced external resource, with the ability to deliver a low cost, efficient value added analytical service from a remote location and/or a freelance service working as a member of your team in-house, allowing for practical opportunities in the area of training, coaching and mentorship's.

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Medical Marketing Research International

Medical Marketing Research International (UK) has recently appointed **Marianne MacDonell** as an **International Research Director**. Marianne has more than twenty years experience in the pharmaceutical industry on both agency and client-side, most recently with Eli Lilly, but also at Total Research, Novo Nordisk and NOP. She brings with her a valuable range and depth of research skills, particularly qualitative insights to optimise the development of promotional materials designed for both professionals and patient audiences.

We would also like to congratulate **Philip Howe** on his new promotion from Deputy Managing Director to **Managing Director** of MMRI. Philip, like Marianne, has extensive experience on both agency and client-side. His previous positions include Head of Business Information for Sanofi and prior to joining MMRI he was a Director at Martin Hamblin.

Video Streaming at 4Discussion brings benefits for all

4discussion research facilities in South Manchester, UK now offer FocusVision videostreaming, which allows you to view interviews or group discussions at remote locations on your computer. This means you and your colleagues can view research sessions in comfort, make savings on both time and money in addition to offering you more flexibility.

Secure viewing is guaranteed with password accessed entry via the FocusVision website.

This technology is the latest addition to the 4discussion facilities, which are located in an elegant historical building close to the M6, Manchester Airport and mainline railway stations. The facilities boast 3 comfortable and spacious studios seating up to 12, all fully air conditioned and equipped with the latest audiovisual technology and digital video facilities. Recruitment services are also available for physicians, nurses and patients.

STUDIO ONE STUDIO TWO

For more information please contact Rachael Turner on +44 1260 295100

Fast Forward Research

Rachael Turner

Rachael joined Fast Forward Research Ltd in the Fieldwork business unit, 4discussion as Fieldwork Executive. She will be managing the viewing facilities in the UK and global recruitment services.

Rachael's background is in sales management within USA Internet leading edge companies.

Rachael brings vast experience in recruitment, internet project management on a varied USA and European basis to Fast Forward Research

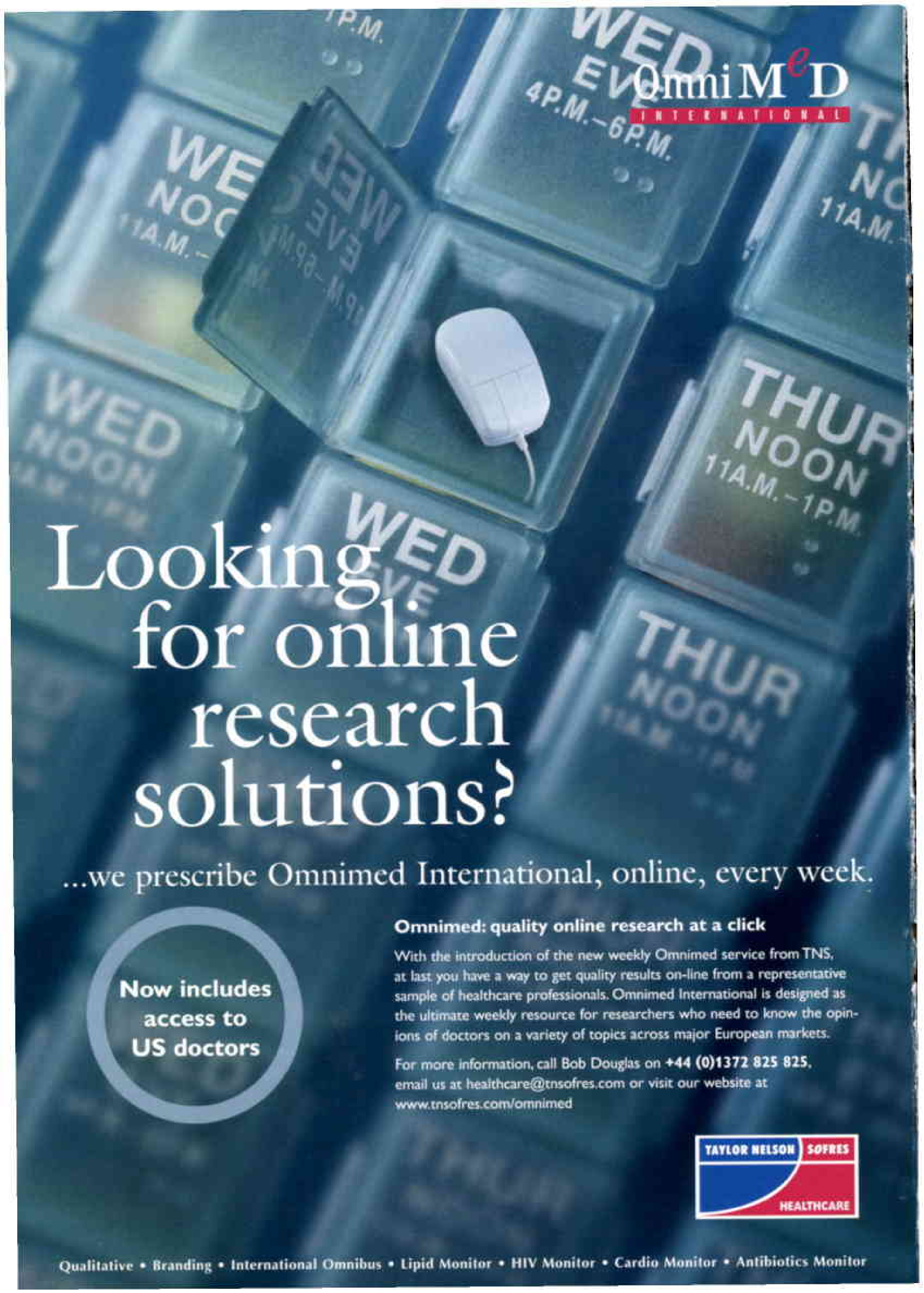
Kirsty Hollins-Brown PhD

Kirsty recently joined Fast Forward Research Ltd as Research Executive. Kirsty started her career as a Research Associate with Unilever based in Rotterdam, Netherlands. Her role was a Research Associate/Assistant Project Manager, in New Product Development specialising in Brand Positioning and Project Planning. Kirsty brings vast experience in project management analysis and reporting to Fast Forward Research, from her previous roles within multinationals.

Interested in submitting an Article?

If you would like to submit an article for possible publication in this Newsletter then forward them to EphMRA at MrsBRogers@aol.com.
We welcome submissions from all parties.

Articles published in the EphMRA News do not necessarily reflect the opinions of EphMRA.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