

# Post Conference **NEWS**

Basel, June 2004

## Market Research will not die!



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You will probably be happy to hear that the participants who had the chance to stay until the last day of the 2004 EphMRA Conference decided that Market Research should not be sentenced to death.

I am sure you will also be happy to learn that, for some talented Market Researchers, there is also a great future as a lawyer, as a judge, or – at least – as an actor. Or is it simply that Steve Sands, Allan Bowditch and Daniel Pascheles missed their real vocation?

More seriously, the Basel Conference was again a conference to remember.

Identifying the reasons for this success is not rocket science:

- Great preparation work from all the people involved: the Programme Committee, the speakers, the organisers, the agencies who were present during the agency fair. As every year, a great deal of effort was invested, but it paid off.
- A high level of participation, both from agencies and from pharmaceutical companies. The richness of the Conference is a direct consequence of the level of attendance.

- The contribution of sponsoring agencies, without whom many things could not take place.

During the many formal and informal discussions which took place in Basel, the Executive Committee took note of several questions, requests or recommendations from participants. You can be reassured that they will be included in the agenda of our forthcoming meetings.

The Association is evolving. The change process initiated two years ago is still on going, and the priority of the Executive Committee is to manage the transition smoothly, because generating disruption could damage the main asset of EphMRA: the "spirit" of the Association, a spirit of team work and openness combined with a constant aspiration to improve market research and maximize the value of our profession.

**Georges Andre**

UCB Pharma

EphMRA President 2003 - 04

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# Pre-Conference Training Workshops

## How Internet Research has changed our Lives - Workshop Review



From left to right Convenors: Carolyn Fenwick, Bob Douglas and Baerbel Matiaske

The interaction we have with computers has changed virtually every facet of our lives, so the emphasis of the workshop was on the opportunities that this presents to us in terms of new sources of information and how this changes the pharma business models.

Internet provides information sources for Competitive Intelligence, Customer Relationship Management initiatives, e Detailing, Post Marketing Surveillance, and large scale transactional databases of sales and drug use in areas which have been problematic for researchers, such as the hospital environment.

Carolyn Fenwick gave a presentation on e Relationship marketing at AstraZeneca. The key argument was that e customer initiatives, both with HCPs and consumers, should be based upon developing an interactive personal relationship with individuals, addressing their specific needs rather than to promote broad promotional messages to a wide audience. Whilst e enabled marketing is still in its infancy it has clear advantages over traditional marketing methods in terms of contact frequency, interaction, flexibility and cost. ROI is therefore greater than off line alternatives.

Likewise the opportunities for e enabled marketing and communication with patients is huge. In the USA 80% of patients seek health information online. Yet companies have not found the right formula to successfully engage their ultimate customers. Consumers are generally dissatisfied with the information provided on pharma company websites.

Website evaluation is therefore crucial, but at the moment still under utilised. Folker Michaelson gave an interesting paper on the latest website evaluation techniques. He provided a case study which showed that one-third of all Company websites actually have a negative impact on purchase intentions! Using an analytical framework which groups the various website attributes, namely; information, stimulation and interaction, he demonstrated that stimulation was most correlated with positive changes in attitude and purchase intention. Michaelson also showed how this varied depending upon the type of brand and the customers' involvement in the brand category.

These findings were reinforced by Dr Knapp who showed that pharma company websites have low visit rates, both amongst patients and HCPs. Patients especially usually seek information on health problems, not brands or organisations.

Paula Smith demonstrated how the use of PDAs have provided useful insights into the ways in which patients deal with chronic pain. In a case study comparing the use of paper diaries, PDAs and automated phone interviews, PDAs were shown to provide the more accurate data. The use of PDAs is increasing in healthcare research particularly in areas where immediate responses are required. Paula provided a useful check list of ways in which the use of PDAs could be optimised.

With internet research forecast to represent 25% of all market research projects by 2005, access to respondents is becoming a key issue. Both Peter Winters and Jerry Arbiter argued that panels were increasingly the way forward. Panels of pre screened respondents not only ensure compliance to the 'opt-in' requirement for internet research, increase response rates and turn-around times, but also minimise the risk of including non bona fide respondents. Both see the use of panels amongst healthcare professionals and patients increasing and become the main means of conducting internet research.

### Workshop Convenors:

**Bob Douglas** - Synovate/Isis Research bob.douglas@synovate.com  
**Carolyn Fenwick** - AstraZeneca Carolyn.Fenwick@astrazeneca.com  
**Baerbel Matiaske** - GfK HealthCare Baerbel.Matiaske@gfk.de



## Evaluating Licensing Opportunities

From left to right: Stephen Grundy and Neil Rogers



The EphMRA PRM&T pre-conference workshop, " ...Evaluating Licensing Opportunities..." was designed, set up and convened by Stephen Grundy (Martin Hamblin GfK), Xander Raymakers (NV Organon) and Ruth Evans (IMS Health). A good blend of experienced and less experienced agency and company executives realised an attendance of 26 delegates.

The workshop was set up to examine an evolving case study, about a company with a major pipeline gap. A challenge faced by many companies today! The style was interactive, with an even balance of presentations and breakout sessions, which enabled the delegates to apply some of the learnings and to appreciate the practical implications of advice they were hearing. The energy, enthusiasm and teamwork from both delegates and speakers ensured a very productive day.

The course gave delegates a thorough grounding in some of the key analysis and decision making tools used to support inward and outward licensing activities. And not all the advice came from the speakers; healthy challenges and good debate drew recommendations from many of the delegates.

Xander Raymakers introduced the programme with a humorous but poignant review of the objectives of the day and an organisations need to find partners in order to thrive.

Stephen Grundy (Martin Hamblin GfK) and Neil Rogers (AstraZeneca) gave an overview of some of the main stream methods used for evaluating the current portfolio status and guiding portfolio decision making. Many of the following tools were explained in more detail using illustrative examples:

Strategy	Business Decision	"The tool kit"	Output
Overall Portfolio	Identify target market sectors What portfolio R&D priorities Business development priorities	Porters 5 forces Boston Matrix Market SWOT Nine cell business screen Core competencies Needs gap analysis Segmentation Outline economic assessment model	Depth understanding of needs, market sectors, segments, profiles and differential advantage of each brand in pipeline. Strategic fit Global financial estimations
Brand level portfolio	Target market segments and differential advantage for each segment	Segmentation Differential analysis Positioning Forecasting	Market segments, ideal brand profiles and line mix, details market and customer needs.

Stephen and Neil set up the evolving case study, and delegates utilised some of the tools from the session to describe the portfolio gaps and produce optional strategies for a fictitious company (Selemin Pharmaceuticals) with a pipeline "desert".

Timothy Fitzgerald (Bridgehead International) lead the delegates to the next stage; "...The role of business intelligence in seeking partners - licensees and licensors..." Timothy built a case, revealing the importance of getting the vital elements right in order to gain the best strategic fit:

- Great preparation; clear directional licensing strategy, strong team organisation with the right blend of skills, effective and rapid execution, and transparent, strong communication.
- Thorough primary screening through intelligence sources e.g.; networking events, online searches, business news, company reports, databases, government and academic sources, direct approaches and unsolicited enquiries.
- Sound secondary screening, using effective due diligence processes.

Delegates took their learnings from Timothy's session to the breakout and produced a primary screen based on real respiratory licensing opportunities; evaluation in action!

Carol Jones (IMS Health) outlined many considerations and approaches that could be employed and an opportunity and accessibility matrix was developed to show the main criteria for partner selection as follows:

### Opportunity:

- Therapeutic fit
- Brand performance - Sales
- Brand performance - Growth
- Innovation and competitive advantage
- Estimation of cost of development and marketing

### Accessibility

- Licensor local presence
- Licensor dependence on candidate
- Licensor current partnering strategies
- Manufacturing needs
- Revenue window

The workshop ended, with delegates providing their view on the value of the tools explored during the day. The consensus, a valuable and productive day spent examining some of the many approaches for Evaluating Licensing Opportunities.

**Stephen Grundy** - Martin Hamblin GfK Global Healthcare

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## Conference Round Up - Session I

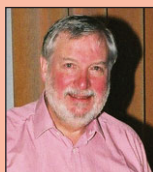
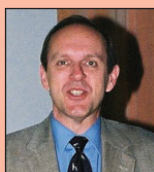
### Looking Back to the Future



The conference opened with a thought provoking session entitled 'Looking back to the Future', which involved four speakers each addressing the main theme of the conference from different perspectives.

The key note speaker, Francois Meurgey, Director of Global Marketing for UCB Pharma, provided the delegates with an overview of where and how marketing research has helped business decisions in the past and how it can help in the future, given the ever increasing competitive nature of the pharmaceutical business. Francois drew upon his extensive experience in both the US and European markets and provided real life examples of how marketing research can provide essential input into commercial decision making in areas such as market segmentation, providing a deeper understanding of how to capture the power of the patient and the emotional drivers behind prescribing decisions. The main tenet of Francois' paper was that in today's pharmaceutical market, success comes not from size or strength but from the ability to make smarter decisions.

Next came a well conducted analysis of the factors which have influenced the commercial success of blockbuster drugs in the past and how these lessons can be used to predict the blockbusters of the future. In her paper, Sarah Rickwood, a Senior Consultant at IMS Health, drew upon the extensive database of market information in that organisation, to demonstrate that many of the factors which influenced the rise of blockbuster drugs in the past few decades are still influential today. Her conclusions were that the opportunities for blockbuster products are still as strong today as they were in the mid-70s, but that to capitalise on these companies must adopt more diverse strategies to ensure success.



From left to right: Francois Meurgey, Sarah Rickwood, Roger Brice and Gary Johnson

The third paper in the session concentrated on the area of pricing

research. The paper, entitled 'Pricing Research Strategies – Past, Present and Future' was given by Roger Brice of Adelphi International Research and it drew upon his vast experience in the area of pharmaceutical pricing research, gathered over three decades in the industry. The paper covered developments in the area of pricing research over the last 30 or so years, the issues in the pharmaceutical pricing environment which impact upon how pricing research is carried out, an assessment of where we are today in terms of methodologies and gave some noteworthy recommendations for the future. His overall conclusions to the paper emphasized the need for researchers to spend more time in fully understanding the environment in which a pricing decision is to be taken, rather than merely concentrating on what the optimum methodology should be to collect data.

The last paper in the session dealt with the advances, or perhaps, lack of them, in the area of forecasting which have been made since the time of the Beatles. Gary Johnson of Inpharmation Ltd UK delivered both an informative and amusing comparison of the beliefs regarding good forecasting in the time of the Beatles with those that are held today, based upon some thorough research of the published views and data in the area of forecasting over the time period in question. In most, if not all instances, his conclusions were that what were taken as 'truths' back then, still hold true today. Thus, the title – 'All the best Forecasting techniques were around at the time of the Beatles' was proved to be the case. Gary's paper also provided the younger members of the audience with a detailed history of the Beatles and their major albums through the years and for those of us who were around at the time of the Beatles, a trip down memory lane.

**Caroline Wilson**

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## Session II: Breakout Sessions

### The Value of Patient Research



The breakout session entitled 'What is the Value of Patient Research' featured a well delivered paper by Kathy Kozak, Hoffmann La Roche, USA and Mark Jeffery from The Research Partnership, UK. The session was moderated and concluded by Saeed Mumtaz of Roche, based in Basel.

The debate centered on whether more patient research should be undertaken or if indeed sufficient was already conducted. Given that patients now drive many prescription decisions which were once the exclusive realm of the physician, it is a wise company who spends time getting to understand and know their customers. Consumer marketing platforms and capabilities were deemed important as well as monitoring and measuring the consumer in the marketing mix.

From a study undertaken amongst 48 companies [mix of agencies and pharma companies] it emerged that the proportion of primary research which focussed on the patient, averaged 17% overall and indeed was under 10% for just under half the sample. Indeed about one third of the sample said that 11-25% of their primary MR was patient research.

Encouragingly the amount of patient research being undertaken, according to those interviewed, was definitely increasing and had already increased in the past.

In terms of timing this patient research was most often conducted in the launch or post launch phase with smaller proportions focussing on patient research in pre-clinical or clinical development.

Arguments proposed for more patient research included:

- The patient is actively involved in the prescribing process. Indeed it was discussed that patients' influence on prescribing decisions was highest when the condition was chronic or particularly serious [for example].

- Patients have increased access to health information
- Opportunities exist for patients to influence product revenue through the product life cycle
- A marketing strategy based on patient needs may be a persuasive product strategy
- OTC drugs status will increase.

On the other hand, it was argued by some that sufficient patient research was currently being conducted since the real customer is the physician who drives product revenues through prescription. Furthermore although information channels are more available now they are also becoming saturated. In terms of implementation of patient research some considered that internal customers may be less skilled in gaining insight from patient research, and senior management needs to be committed to patient research for ensure success.

Legal restrictions eg HIPPA may constrict patient research and further developments in such barriers may impact and individual country legislation needs to be examined.

The session concluded that more patient research should be undertaken at an earlier stage, but if more research was not possible then at least patient studies should be considered earlier in the product development. The value of patient market research should be emphasised more by researchers and proposed more widely as an essential part of the primary market research plan.

An approach which was different and better should be embraced:

- build skills in consumer insights, DTC and Internet research
- continue to innovate and capture new technologies to further develop expertise
- ways of applying patient research throughout the brand lifecycle should be explored.

Overall it was a lively and interactive breakout session providing the audience with food for thought and actionable take away messages.



## The Global vs Local Perspective



At the 2004 Conference, in Basel, the main objective was to discuss and analyse what the future holds for market research in the Pharmaceutical field.

There were two parallel sessions running, both on very interesting topics and this second session focused on the relationship between the Global and Local perspective in the same field.

How often this topic has been discussed, I can no longer remember, however the structure and aim of the session was quite original: we had first of all a 35 to 40 minutes presentation, trying to determine "where we currently are". This was then followed by a 25 minute debate, involving the audience, in order to record attendees' opinions, further comments and examples and to identify any suggestion to make the future look better, if possible.

The presentation was prepared and given by Molly Knott of Novartis Pharma, and Stephen Grundy from Martin Hamblin GfK Global HealthCare, and aimed to determine if Global and Local entities are allies or enemies while working on the same project. Is there any area of conflict? If yes how should the conflict be managed or how could be avoided in the future?

Molly and Steve compared the Pharma industry to others areas, and came to a conclusion that one experiences an equal pressure towards the global integration and the increase of local responsibilities. Within the Pharma industry, however they recognised areas which are more global or local oriented.

As a matter of fact Finance, Research and Development as well as Procurement are managed at a global level, while the relationships with the local governmental bodies, and marketing and sales strategies are handled at a local level.

They also recognised how, looking at a given product lifecycle, that there is a very clear distinction of roles between the local and global players: while the pre-launch stages "belong" solely to the Corporate HQs, the peri and post launch ones are managed by the local subsidiaries, or at least record their involvement, of course more dominant than in previous stages.

As described till now, it looks like every competence is fairly simply divided between the global and local bodies. Nevertheless the reality is not so smooth and often conflicts may occur. This is mainly due to the different perspectives people working at different levels have:

- Global managers focus on long term strategical performances
- Global managers tend to standardise the procedures as much as possible
- Local managers are focused on short term tactical results
- Local managers desire they have greater freedom of choice

So....who is right? It is very difficult to say - we would not blame Global managers trying to achieve their tasks adopting a standardised approach, although we cannot deny this approach often brings difficult results in specific markets.

I am sure everybody can recall examples of Global Brand names imposed locally by the global HQs, which resulted in being funny (the lucky case) or totally inadequate in some markets.

Once we all agree we are not the happy family living in a perfect world of families!! it is definitely appropriate to find out why this conflict occurs. Molly and Steve highlighted that these contrasts may be generated both inside and outside the Company's environments.

Internal forces:

- Timing differences between Local and Global (something urgent for the global HQ may not represent a priority for the local affiliates and vice versa)
- Lack of communication (local affiliates may not be aware of some initiatives started by the Global HQ and vice versa)
- Politics
- Budget restraints

External Forces:

- Cultural differences between markets
- Structural Differences between markets (Penetration of generic brands/DTC advertisements)
- Regulatory/Reimbursement differences

*Continued next page>*

Until now we have been discussing problems and conflicts that may occur inside a Pharmaceutical Company. Nevertheless the same problems may be experienced by Market research agencies whenever a global firm has to manage a multi Country project. For example there are methodologies which are extremely successful in some countries while in others they are difficult to implement or cause incredible problems to project managers.

When we think about focus groups in Japan, or the implementation of web based studies which are extremely popular in the US, but still have difficulties in finding their "way" in some European countries.

Molly's and Steve's presentation ended with a few thoughts and suggestions on how the problems may be solved or prevented in the future. They of course did not mean to give the panacea to the audience but only drop in a few conclusions to start the ensuing debate with.

They claimed how important it is to determine and agree beforehand a common strategy, and the best way on how to implement it. Of course since the very beginning all the players that who may be involved have to be an active part of the decision making process: Global, Regional and Local players.

In order to achieve these results it is crucial to set up a Consultative environment within the Corporation where everyone's opinion needs to be taken into consideration, and every player shows a willingness to listen to everybody and great flexibility in sharing their views.

To summarise their opinion, it is vital that a two way communication is established in order to agree approaches from the very beginning. This is important because it would avoid wasting resources and duplicating efforts. Is anybody disagreeing in the house? Its hard not to agree with such this basic thoughts.

The debate which ensued after the main presentation was very lively and interesting.

To start, we asked the attendees to declare which side of the river they were working on. We found out that most of the people attending were equally split between those working in a Global Market research firm or in the Global HQ of a Pharmaceutical Company. Few people were working in local fieldwork supplier agencies, and ONLY ONE person was from a local affiliate of a Pharmaceutical Company.

As soon as the debate started it looked evident that the relationship between the Global HQs and local affiliate offices of Pharma Companies is pretty problematic.

The main issue is that local affiliates want to play a relevant role in each project run in their own Country and may interfere with the main objective the Global HQ is pursuing, they try to add their own questions in order to assess their current local marketing issues.

Furthermore it has been stated that often local affiliates may impact the timing of a project while checking the materials that need to be fielded for a given project.

The problem, as we may see, is mainly political. It was a pity we did not have enough representatives from local affiliate offices to reply and give us their own view about this situation. We agree every given project may represent a good opportunity for local managers to look into the market and explore how it would react to a specific issue, especially given the budget constraints that local affiliates experience, which heavily affects their ability to run enough local Market Research Projects.

During the debate it was agreed that it was appropriate to have the local managers participating in the process, and, whenever possible they should be allowed to cut a little space for their local problems (probing a given issue, or adding a question). However this should not happen whenever a market research project is made in order to support decisions related to those products which are still in the pipeline. It had been agreed that the final decision and responsibility belong to the global HQ.

And ....what about Market Research Agencies...where are they and how should they behave whenever such problems occur?

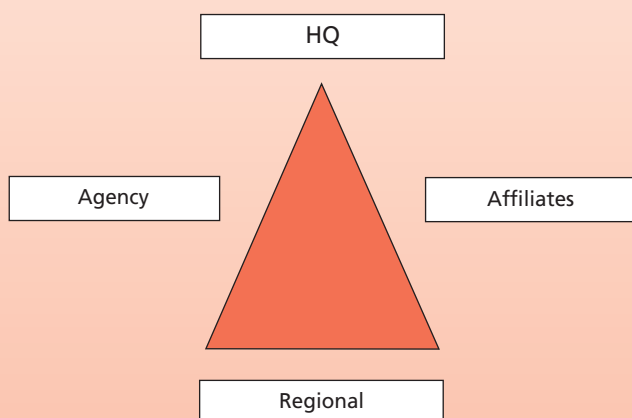
It looks like they are in an unpleasant position: what if the local affiliate steps directly in and asks the agency (bypassing their HQ colleagues) to interview a specific respondent or to add in questions?

Well, it should be remembered that the client is the Global HQ, thus it is simply necessary to "suggest" to the local managers to turn their request to their Global colleagues, given they are the only ones to hold the decisional power with regards to the project management.

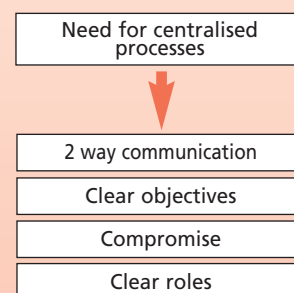
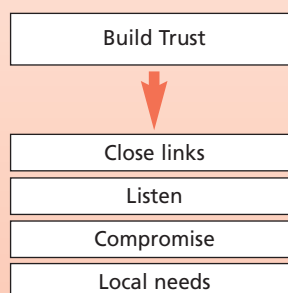
The same applies whenever the problem is faced by the local fieldwork agency: their client is the Global Market Research Agency, consequently any changes or decisions have to come through them.

Communication via all parties is vital.





Finally it is clear that the only solution to the problem is to make clear where the responsibilities lie, stating who can do what at the outset. It is, nevertheless very important to involve as much as possible the local players, who could bring extremely valuable ideas and insights, not only about their products but on the competitive environment in their local market as well, and have the right to be part of the process anyway.



The recipe is there, and looks very simple! However I am sure most of you doubt that the problems will be solved that smoothly in the future...Why? Simple, because we are human, and the relationships between subjects leads to unpredictable results! I am sure anyway, the conclusions we came to would help to improve the process and the relationships between Global and Local.

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## Session III

### Glancing Sideways at the Future



Steve Burrows

Steve Burrows and Sabine Ward presented the results of a small market research study they conducted amongst client and agency respondents. While they learned many interesting things from the 25 interviews they conducted, they concluded that a central requirement for successful market research collaboration is the effectiveness of relationship management.

In their presentation, critical relationship management skills include: managing expectations, assertiveness, negotiating skills, and influencing skills. Any shortcomings in relationship management can lead to friction during the course of the project and can reduce the value of the project to the end users according to Burrows and Ward. Beyond skill deficits, other impediments to successful relationship management can be lack of clear communication and insensitivity to internal politics.

Burrows and Ward reported that good relationship management skills can be learned both in formal courses and by on the job experiences. In particular they recommend regular review meetings to monitor projects and identify areas for improvement in relationship management. One intriguing suggestion was to offer the opportunity for different team members to shadow each other in the work environment.

While relationship management was a central theme of their presentation they also discussed the need for superior market research skills and SMART recommendations. Overall Steve and Sabine provided a lively presentation and left the audience with several specific ideas to contemplate.

**Mark Nissenfeld**

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## Session IV

### Will time go on?

#### How Many Words is a Good Chart Worth?

With his usual élan, Richard Vanderveer of V2 GfK offered his point of view about presenting pharmaceutical data. His presentation borrowed heavily from the work of Edward Tufte, and incorporated his own experiences. Dr. Vanderveer provided some gripping examples of how poor presentation can lead to disastrous results. In his point of view, the Challenger Shuttle disaster could be attributed in part to poor presentation of critical safety results. Fortunately, the examples from the pharmaceutical industry were less dire although equally compelling.

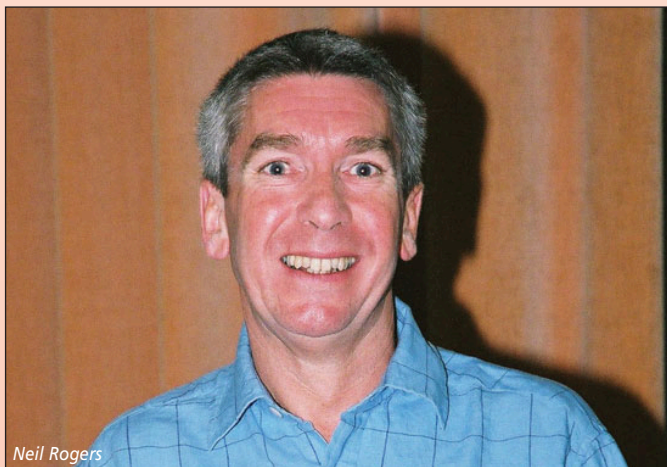
Dr Vanderveer challenged each of us to strive for excellence in our presentations. One of his central tenets was that a presentation should be structured and guided by the purpose of the market research study. He offered some specific guidance for several of the commonly performed types of market research studies. These were aptly illustrated of examples of both good and bad deliverables. Members of the audience often chuckled knowingly when he showed a particularly egregious example of poor presentation.

One of his final take home suggestions was to build a library of efficient presentations and not start from scratch for each deliverable. Part of what contributed to the quality of Dr Vanderveer's presentation was the way he practiced what he preached. He deployed many of the techniques he advocated and also used humour to keep the audience engaged. A number of conference attendees remarked that they had learned something practice from his presentation and that they would do things differently in the future.

#### Brevity is the Soul Mate of Insight

Neil Rogers also spoke about presentations, but from the manufacturer's point of view. From Neil's point of view it is essential that a proper presentation provide insight and be geared to the needs of its specific audience. Insight should be embedded throughout the whole body of the presenta-

tion and be brought into sharp focus in the Conclusions and Recommendations section according to Neil. It is the quality of this insight which determines the value of the presentation said Neil.



Neil Rogers

However, Neil was quick to point out that the insight would not be as fully appreciated unless it was specifically tailored to the perspectives and needs of the audience. Whilst the suppliers tend to be market researchers in one guise or another there are a multitude of individuals on the manufacturer's side who will interface with the market research. Many of them are not career market researchers and some may not even be fully conversant with market research practices. Therefore, Neil considers it essential to the success of a presentation to take into account who will be in the audience.

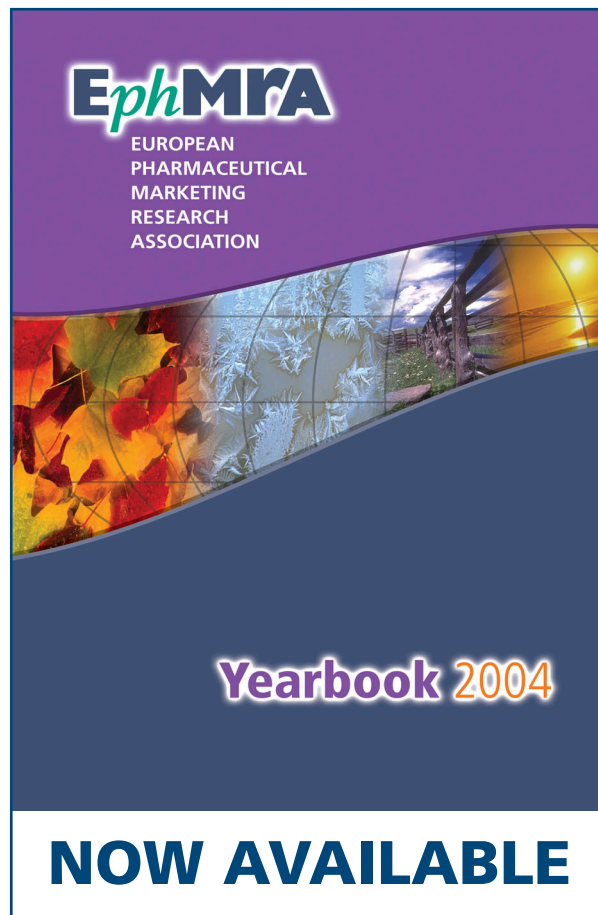
Neil succinctly made a pitch for brevity in market research presentations. This is partially a result of busy schedule but it is more fundamental than that. Neil postulated that the impact of a presentation can be diluted by excess length. Furthermore, the insights which are so valuable can be lost amongst the myriad of details that clog longer presentations.

True to his creed, Neil's presentation was lean and to the point. The audience warmly received his talk. Neil stayed after to answer some questions from participants and this was appreciated.

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## Facts & Figures

about the Newsletter publication

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# Conference Photo Round-Up

## Hawaiian Evening









## The Trial - SHOULD MARKET RESEARCH LIVE OR DIE



From left to right: Steve Sands, Novartis Pharma; Lord Allan Bowditch, Martin Hamblin GfK; Daniel Pascheles, Aventis Pharmaceuticals.

All silent in the courtroom whilst high court judge, the honourable Lord Bowditch, on loan from Martin Hamblin GfK Global Healthcare in the USA, entered the arena in full judicial regalia to set the scene and inform us of the charges for heinous crimes against that not quite so young whipper-snapper Mr. Mark Research. The crimes appeared to be several, and to have been committed repeatedly over quite an extensive period of time:

- ranging from the minor charge of "failing to adapt to the persistent flow of time and deliver succinct / actionable guidance to management"
- through "second degree manslaughter of many launched products"
- up to the main charge of "first degree murder of many emerging products within companies".

Who would have thought that in the midst of such pleasurable get-togethers in as innocent a setting as a Swiss Hawaiian night, a Belgian medieval banqueting cellar, a Spanish flamenco evening and the like, such a cut-throat killer was actually on the loose and yodelling away freely. Enough to curdle the milk in those excellent Swiss chocolates abounding at every coffee break!

The case for the prosecution was deftly put to us by that esteemed lawyer of international fame, Steve Sands from the well-known legal firm Novartis Pharma AG. Immediately summing up his case that brands are indeed failing to deliver their promise he claimed that Mr. Mark Research has contributed to the missing of more opportunities than a Germany football team. A bit below the belt I thought, but certainly got the message across. The simple world of yester year with patients visiting their doctors for a prescription for

their illness, with the more difficult cases being referred on to a specialist has been sneakily replaced with a much more complex one.

We are now full of informed patients challenging doctors to guess the correct diagnosis. Doctors now go to conferences and have international guidelines, would you believe. Governments have also got in on the act with pricing, prescribing rules and formularies to complicate the picture. Mr. Mark Research shouldn't have been fazed by this, he should have been able to cut through this complexity and say what elements really count. Clearly, the prosecution proceeded, there have been accomplices in Mr Research's incompetence – the appalling product manager brief asking for the A to Z of the life of an asthma patient, across 17 countries all in the space of three weeks, without really stating why the information was needed.

Surely Mr Research should have delved a bit further? Analysis just full of words and analogies on paper, abounding with speech bubbles, without a snippet of a conclusion! Why hasn't Mr Research been moving towards a true partnership between the Brand Team, the Client and Agency market researcher, using the latest research techniques and providing synthesis and recommendations, even when the news is bad? Didn't look too good for Mr Research at this point.

For the defence we heard the case put to us by experienced US lawyer Daniel Pascheles from the international law firm Aventis Pharmaceuticals. He claimed that Mr Research has been doing precisely what is required to provide the best support for decision making. The right kind of information has been provided: accurate, on time, to the point, encouraging ideas. Usable information supporting business decisions has been provided: helping to guide future actions, minimize risk, maximize opportunities. Bad and unusable information has been sifted out. Market research has developed to provide appropriate answers right throughout the product life-cycle from discovery through launch and beyond, helping to define the market and develop the best product strategies and implement them. Mr Research has provided the information to minimize the guessing of relevant marketplace facts and increase the probability of making optimal decisions. He is not to be blamed if the ultimate decision makers choose to ignore this advice. The advice, and good advice to boot, has been provided.



Balance moving in favour of Mr Research? Time for the key witnesses. Prosecution called to the stand the recognised expert in the field of international market analysis Professor Graham Lewis of IMS Health Inc. We were presented with the hard facts of the world in which we now live. The relative contribution to growth in our industry of the top 10 companies has dramatically declined over the last 5 years. Innovative products need to penetrate markets faster because follower drugs are snap-ping at their heels in a shorter and shorter time frame. A drug needs to achieve a minimum of \$500 million sales a year within 3 years from launch to fuel the double digit growth required by market investors. Over the last decade or so over 80% of NCEs had not achieved this. The world is more cut-throat and Mr Research needs to slice through the complexity to help understand the how and why behind success. He should be providing regular monitoring of key performance indicators and helping to make those effective decisions, sharing best practices and so on. OK, so times are difficult but is Mr Research to blame?

The second witness for the prosecution to the stand was the expert in FMCG research, Prof. John Gladish from Pennside Partners in the USA. We, in the pharma industry, were to be shamed into hearing the contemporary success story of the consumer brand Starbuck's coffee. In a fast moving market place such as the specialty coffee market, Starbuck's has managed to rapidly increase its share of market over the past 5 years by creating a high level of customer retention through the regular tracking of customer needs. Surprisingly(?), these turn out to relate to aspects of customer relations and cleanliness rather than the coffee itself. Well, slap my thigh! The case against our Mr Research was: OK so if Starbuck's can manage to provide real time information enabling tracking and implementation of change leading to success, why can't you do it? Defence Council rather harshly dismissed this witness I felt with a comment along the lines of the evidence being about as relevant to the pharma industry as a MacDonald's hamburger being prescribed for the treatment of hyperlipidemia.

Summing up on the prosecution side we were told that those that offer persuasive argumentation will be the winners of the future, not simply the describers of a complex world.

On to the defence witnesses. Firstly, esteemed Professor Stephen Godwin from Synovate/Isis in the role of the man on the Clapham Omnibus. Here we were presented with three very subtly disguised case studies of situations where market research had:

a) indeed contributed to the first degree infanticide of a potentially lethal pipeline product all in a period of 3-4 months from the initial brief. Thought leader research picked up the product defects, leading to the quiet dropping of the product in its early stages thus saving the Company a lot of money in further development

b) helped a client check out a possible acquisition drug target via a survey carried out over a two week period. Results were positive for the acquisition and although the Company decided to back out from the auction, at least they had the information they required. P.S. they probably acquired it in the end anyway.

c) helped turn around the fortunes of a tiring cash cow via identification of the market requirements, testing of a new positioning strategy and subsequent appropriate communication programme all in the space of a year or so. Sounded rather similar to the Starbuck's case, albeit slightly slower.

Tension was created around the second defence witness, unfortunately unavailable due to having to fulfil her MR functions within her Company. Surprise witness Linda Grosjean of Roche was sworn in following consultations with Lord Bowditch. Further excellent case studies were presented of market research having contributed to:

a) a realistic assessment of the utility of conference exhibition stands over a four month study period allowing an overhaul of stand planning to be made

*Continued next page>*



b) the effective analysis of resource allocation across It's AboutTime Inc's pipeline products, allowing the favoured but potentially poor performer to be culled and resources to be redirected into more promising areas for the Company

c) the successful acquisition by Medium Size Corp. of a Company with a product in a therapy area new to them. The investigation of the new market, treatment algorithms and customer needs (not wants) provided information which also helped hostile local affiliates buy in to the venture.

This witness argued that profitability should be the key to success, not growth in itself. Defence council in summing up put to us that CEOs are responsible for deciding yes or no to a product and they can do this on the basis of marketing research results or not.

Needless to say in the face of such strong evidence presented by the Defence Council the jury voted to overthrow the major charges. In his summing up of the case Judge Bowditch showed us Sean Blair's June 2000 article in Marketing Business entitled "Bang bang, market research you're dead" in which the emphasis was on marketing research (not market research) needing to look beyond the graphs and spreadsheets and produce actionable recommendations. Maybe the jury voting against, but not unanimously, the minor charge of Mr. Mark Research "failing to adapt to the persistent flow of time and deliver succinct / actionable guidance to management" was a recognition that this is perhaps the area which Marketing Research needs to keep persistently in mind at all times. This is what counts in our business and this fun concluding session to the conference provided a good debate around why we always need to do this.

**Nigel Burrows**

PiTRE

nigel.burrows@pitre-italy.com

## The Basel Agency Fair

### One of the largest ever

A very successful agency fair was held on 1 July with 50 exhibitors as follows:

- A+A
- A+A Fieldshop
- Adelphi
- All Global Ltd
- AnaBus
- Back Bay Strategies LLC
- Consumer Health Sciences
- Decision Resources
- Decisions Research
- DocCheck Medical Services GmbH
- Double Helix Development
- The Dunn Group
- Essense
- Evaluate plc
- Fast Forward Research
- Fieldwork International
- Genactis
- GfK HealthCare
- Gillian Kenny Associates
- HMI
- IMS Health
- Insight International
- Intage
- InterCAM Ltd
- Martin Hamblin GfK Global HealthCare
- Medefield
- Medical Marketing Research International Ltd
- NOP World Health Europe
- PharmaForce International – Europe
- PITRE
- The Planning Shop international
- Praxis Consulting Ltd
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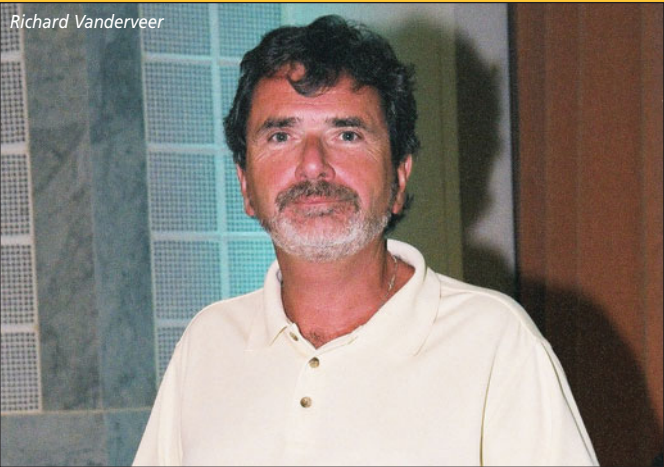
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# Richard Vanderveer, V2 GfK

## Wins 2004 JHH Award for Best Paper



Richard Vanderveer from V2 GfK with his paper “The ‘Presentation’ of Pharmaceutical Marketing Information” was voted, by the conference delegates, the winner of the Jack Hayhurst Award for the best paper.

In second place was Francois Meurgey, UCB Pharma with a paper entitled “Back to the Future”. Third place went to the paper entitled “All the best Forecasting techniques were around at the time of The Beatles” by Gary Johnson, Inpharmation.

Congratulations to all!

# Many thanks to the 2004 Conference Programme Committee...

...for steering the successful Basel conference and programme

- Barbara Ifflaender ..... Altana Pharma
- Kurt Ebert ..... F Hoffmann La Roche
- Saeed Mumtaz ..... F Hoffmann La Roche
- Caroline Wilson ..... Praxis Research & Consulting
- Mark Nissenfeld ..... Ziment
- Piergiorgio Rossi ..... SGR International
- Janet Henson ..... Conference Organiser
- Bernadette Rogers ..... EphMRA General Secretary

# EphMRA Executive Committee

## The current members of the Executive committee are as follows:



Georges Andre, UCB Pharma will become Past President of EphMRA on 1 October 2004. Barbara Ifflaender, Altana Pharma will become EphMRA President and Francois Feig, Merck KGaA becomes Vice President on 1 October 2004.



## Award to Allan Bowditch - Martin Hamblin GfK Global HealthCare

EphMRA took the occasion in Basel to say a hearty Thank you to Allan Bowditch for his tremendous effort and support to EphMRA over many years. Allan has made a very wide ranging and valued contribution spanning the annual conference, training courses and workshops, committees and other activities. An outline of Allan's contribution was given by Panos Kontzalis, Novartis Pharma and an EphMRA Past President.



**2004**

- 1 July** - Early Bird Cut-off deadline for Training Courses - Value and Pricing a Continuous Challenge and The Research Toolbox.
- 24 September** - Submission deadline for synopses for 2005 Conference in Berlin. MR = Maximising Reach
- 20-21 October** - Brussels, Belgium. Value and Pricing a Continuous Challenge.
- 20-22 October** - Brussels, Belgium. The Research Toolbox.

**2005**

- March/April** - Brussels, Belgium - PRM&T Spring Training Workshop - Segmentation- How to Target and Promote to the Customer Effectively.
- 22-24 June** - Annual Conference, Berlin. MR = Maximising Reach
- 17-18 November** - Brussels, Belgium - Positioning - Getting it Right - PRM&T Training Course.
- 17-18 November** - Brussels, Belgium - Global Significance of Customer Satisfaction

**Also planned for 2006** - Training Courses - Brand Equity, Modelling / Forecasting.

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## MMRI - The KOL Specialists

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##### OPEX™

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##### CLIN — T&C™

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##### KOL - ADVISORY BOARDS

###### Comprehensive Ad Boards - 2 days

###### Targeted Mini-Ad Boards - 1 day (3-5 hours in duration)

One-day and two-day (national or international) Advisory Boards on any medical topic and in any location. The full process can include client briefing, Key Opinion Leader selection, profiling, invitations, moderating, reporting and feedback — but we will also undertake any individual parts of the process as required.

##### RAPID RESPONSE RESEARCH — (KOL — RRR)

For those companies who need to explore a number of key issues in an in-depth study with KOLs, in the most rapid possible way — answers to your questions are analysed and presented within just a few weeks.



##### REIN™ - REGIONAL INFLUENCER PROGRAM

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##### KOL INSIGHTS AND EXPECTATIONS (KOL I+E)

Multi-client Studies on the perceptions of KOLs regarding future developments in a particular disease area. Based on in-depth interviews with KOLs in Europe and the USA, reports provide the Pharmaceutical Industry with a focused perspective of KOL thinking about current and future developments in each specified therapy area. Topics covered include: Alzheimer's Disease, Asthma, Colorectal Cancer, Diabetes TII, Osteoporosis and Rheumatoid Arthritis.

##### Executives:

Dr Mo Sacoar (Managing Director/Chairman)  
Dr William Russell (Research Director)  
Ian Dunham (OPEX™ Director)  
Christin Firchau (Associate Research Director)  
Basil Feilding (REIN™ Program Manager)



# The EphMRA Award for Contribution to Pharmaceutical Marketing Research - 2004

Winner: Isidoro Rossi



In 2001 EphMRA initiated an award which was first presented at the Athens 2001 conference. This award is a recognition of a person's outstanding contribution to pharmaceutical marketing research.

Previous winners:

**In 2001** the winner was Panos Kontzalis from Novartis and runner up was Allan Bowditch from Martin Hamblin GfK.

**In 2002** the winner was Allan Bowditch from Martin Hamblin GfK Inc and the runner up was Rainer Breitfeld.

**In 2003** the joint winners were Janet Henson and Bernadette Rogers and the runner up was Dick Beasley.

The award recipient can be from a pharmaceutical company or supplier/agency and will receive the award based upon:

- having made an outstanding/recognisable contribution to EphMRA
- having made an outstanding/recognisable contribution to pharmaceutical marketing research

Examples of such a contribution are:

- New technique developed
- Strengthened the role of marketing research in pharmaceutical companies
- Done much more than agreed and contracted
- Representation of EphMRA to other associations or organisations
- Strengthened the role of EphMRA
- Lifetime achievement etc

The award recipient will receive a certificate plus memento.

2004 Nominations were:

**Dick Beasley** ..... EphMRA Treasurer retired  
Foundation Board [collectively]  
**Nigel Griffiths** ..... Insight International  
**Colin Maitland** ..... Synovate/Isis  
**Bob Douglas** ..... Synovate/Isis  
**Steve Grundy** ..... Martin Hamblin GfK  
**Theresa Ormiston** ..... IMS  
**Isidoro Rossi** ..... Novartis  
**Marianne Schiller** ..... Schering AG

Winners:

**Isidoro Rossi** – Novartis Pharma AG

Runner Up **Dick Beasley** - EphMRA Treasurer retired

Third Place **Marianne Schiller** – Schering AG

## A Very Special Guest Dr D Burckhardt EphMRA President 1969-1970



Dr D Burckhardt, President of EphMRA when the 1970 annual meeting was held in Lucerne, Switzerland was invited to the conference to address the delegates. He gave a lively insight into the issues of the day facing the delegates in 1970 and the essence of the conference at the time. Dr Burckhardt was thanked by Georges Andre, President for coming to the Basel Conference.



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# 2005 Call for Synopses



Berlin is the right place for Pharmaceutical Market Research to be. In this young and fast moving city, where borders have dissolved, we will discuss an extension of the reach of Pharmaceutical MR.

In an environment which is fast moving towards more and more specialisation, Pharmaceutical MR has to expand to work across borders and keep them transparent.

We invite speakers to take us through the experience to maximise the reach of Pharmaceutical MR with regards to breaking down the barriers for MR involvement and achieving a true holistic approach for Market Research professionals.

## Session One - Reaching out... to where?

Market research is good at reminding itself that it must add value to survive. Rather than theorising on this idea for the umpteenth time, this session aims to highlight the actual experiences of people who have made strides in developing market research's strategic relevance to departments and decision processes beyond the traditional scope.

We wish to identify the opportunities for reaching out within the pharmaceutical company in terms of examples of where the input and influence of market research has been able to make a real difference.

In doing so, the session will discuss how barriers and objections have been overcome and detail the opportunities which have been harnessed. Insights in the resulting implications for the market research function in terms of size and structure will be an issue.

Importantly this session will set the scene for the following discussion of the tools, skills and the people required at all levels and stages of the market research process to make a success of a more pervasive market research function.

## Session Two - Projects that Maximise Reach

We have all seen projects, which, while not necessarily large or complex, nonetheless achieve a 'special' result. That is, they make people who have not previously appreciated the insights that market researchers can offer, re-evaluate their position.

This session will seek learning points from projects that succeeded in carrying market researchers (and market research) into a new area, like portfolio management, product regulatory affairs, health outcomes, competitive intelligence, etc.

In the papers selected for this section we would like to know, for example:

- How you got involved in this 'different' project in the first instance?
- Who were the 'usual' members of the team?
- If the market researcher had not been involved, how would the client's company have resolved or addressed the questions that were at issue?
- If an agency was used for the project, was the agency selection process any different, or the agency briefing process?
- Why was the project a success, e.g. did it exceed expectations, add insight, bring in new features. How?

## Session Three - Maximising Information Collection and Use

On its way to providing functions with the most relevant information for decision making out of the vast amount of information around, market researchers feel an ongoing need for optimising the information management and giving insight. In what way have the market needs changed and why do we feel the market researcher has had to adapt in order to answer these new needs.

We are looking for papers from both client and agency perspectives on how to cope with the request, in general in looking how to sharpen skills for selecting and prioritisation and finally, which technology will best support this.

## Session Four - Where is the Researcher with the Holistic View?

It's about matching the skills required with the person, the personality, the job function. It's about the people who have a vision of the big picture. Is it a single person or a department? If a department: what is the ideal size, how should this be organised, what are the interactions with other Company functions that need to happen, who decides on this. Whilst the previous session looked from the viewpoint of the market demanding these capacities, this session looks at what skill-set is needed from the people involved:

- whether it is possible for a single person to provide this "company" need or is only a working group capable of synthesising the mass of information out there.

How is it possible to prioritise which people or departments are to be involved in making decisions at a corporate level? Is extra training needed for the people currently there or do they need to be brought in from outside?

We want papers to argue for and against this issue; to debate the skills required, training needed, the personality most suitable, the optimal size for fulfilling this function. We invite papers from people not only in the market research function but also from those in other job functions who make use of market research, e.g. people working in upper management, portfolio management, competitive intelligence, health economics. We want papers looking from many angles: people who have organised this change, who have been through such change or people involved in the theoretical change management viewpoint.

Creative, interactive approaches in this session are invited.

## Synopses

Participants wishing to present a paper should submit a written outline (300 - 500 words in English) to the EphMRA General Secretary before 24th September 2004, which can be e-mailed to MrsBRogers@aol.com.

Synopses should outline the main argument to be put forward, describe the case study/data which will be used to support the argument, present the major findings or conclusions and list any published papers which will be referred to. Your synopsis should clearly outline in a separate paragraph the key take-away messages you anticipate from the paper.

### Your synopsis outline must include:

- Paper title.
- The session for which the paper is intended.
- The names of the conference paper presenters and these are to be distinguished from contributing authors. Please make this clear in your synopsis.
- A half page curriculum vitae for each speaker.
- The full name, address and contact details of each presenter.
- Company employed by and nature of business.

## Timetable

<b>24th September 2004</b>	Synopses of proposed papers to be received by the Programme Committee
<b>By end October 2004</b>	Programme Committee comments sent to the authors
<b>31st January 2005</b>	Full papers required
<b>20th - 22nd June 2005</b>	EphMRA Committee Meetings and EphMRA Annual Members Meeting
<b>22nd - 24th June 2005</b>	EphMRA Conference

## Programme Committee

**Barbara Ifflaender** - Altana Pharma, Germany - barbara.ifflaender@altanapharma.com  
**Marianne Schiller** - Schering AG, Germany - Marianne.Schiller@Schering.de  
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**Janet Henson** - EphMRA Conference Organiser - janet.henson@wanadoo.fr  
**Bernadette Rogers** - EphMRA General Secretary - MrsBRogers@aol.com

Please email your synopses to Bernadette Rogers.  
 Enquiries about the conference should be addressed to Janet Henson.

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