

# EphMRA NEWS

EUROPEAN PHARMACEUTICAL MARKETING RESEARCH ASSOCIATION

Issue: December 2005



*Dear colleagues,*

I am delighted to introduce myself to you all as the current President of EphMRA - I was voted in at the AGM in Berlin, June 2005 and I have now been 'in office' since 1st October. Having served the previous 12 months as Vice President of EphMRA I have had plenty of opportunity to observe and participate in the very wide range of activities which EphMRA undertakes.

First I am sure you would join me in taking the opportunity to thank the outgoing President Barbara Ifflaender, Altana Pharma for being at the helm of EphMRA through a challenging year. Barbara initiated many new projects in order to put the association on a solid basis, as well as improve the roles and responsibilities of the committees and support functions. Barbara remains on the Executive Committee as Past President. I would also like to welcome Anne Loiselle, Abbott Laboratories as Vice President and members of the Executive Committee - Kurt Ebert [F.Hoffmann-La Roche Ltd], Kerstin Lilla [Solvay], Achilleas Papachatzis [Novartis Hellas] and Ulrich Wuesten [Bayer Healthcare]. We hope you will feel free to contact any member of the Executive with any query you may have.

The Association is also in good financial shape and able to support our full range of activities and member benefits. Ulrich Wuesten was Treasurer 'ad interim' for a one year period and in June, Michel Bruguere-Fontenille (ex Merck Sante) was voted in as Treasurer for a two year period starting 1st October 2005. Ulrich did a fantastic job in introducing new processes, new tools, defining roles and responsibilities to improve the speed as well as the transparency around our finances.

We have also recently seen the formation of the Associate Members Board. Shortly we will have about 100 Associate Members of EphMRA - a very high growth rate in membership levels has been experienced given that membership was only introduced in 2001. The members come from a range of types of companies - from the largest full service agencies to one person consultancies and fieldwork suppliers. The Executive Committee looks forward to interacting with the Associate Members Board over the coming months.

At all times the work of the Committees and Chairs is vital and needs to be recognised since it is in these forums that the groundwork of the Association is done and topics of importance to members in their daily work are addressed. Thank you to all involved for giving of your time.

EphMRA has an important event coming up - the Interim Members Meeting (IMM) on 8th February 2006 at the Sheraton Hotel Brussels Airport. Building on our first highly successful meeting that we organised in 2005, we believe the 2006 IMM will be of even more value to you as we strive for more exchange and learning experiences.

We encourage as many of our Full and Associate Members as possible to attend. You can find more details in this News on page 2 and also please look on the web site at [www.ephmra.org](http://www.ephmra.org).

In addition in Q1 2006, we will again be conducting our Internal Members Survey to assess views amongst the membership on a range of activities within EphMRA. This is your opportunity to give feedback to the Executive and provide input into strategic planning.

I am very much looking forward to my year as President and hope to meet as many of you as possible. Feel free to contact me at any time.

*François*

François Feig  
Merck KGaA, Pharma Ethicals,  
Head of Global Marketing Services  
EphMRA President 05 - 06  
[francois.feig@merck.de](mailto:francois.feig@merck.de)

## **Facts & Figures** about the Newsletter publication

Deadline for Advertising in the March  
2006 News is January 20th 2006  
(see page 5 inside).

# Interim Members Meeting

## 8th February 2006, Brussels Airport

### EphMRA IMM

Interim Full Members Meeting  
Full Members only  
10.00 until 14.30  
See programme

### EphMRA Associate Members Meeting

Associate Members only  
11.00 until 14.30  
Agenda will be circulated by  
Associate Members Board

### EphMRA Networking Event

Full & Associate Members Only  
15.00 - 16.30 - Leadership and  
Teamwork - motivate, communicate,  
succeed and inspire.  
16.30 - 18.00 - Networking Cocktail

The Interim Members Meeting and Networking Event takes place on 8th February 2006 at the Sheraton Brussels Airport Hotel only a few steps from the airport's terminal entrance.

The meeting and networking events are only open to Full or Associate members and attendance is free of charge.

The agenda for the Full Members Meeting is as follows:

09.45 - 10.00	Welcome - Coffee
10.00 - 12.30	<p>Introduction of attendees</p> <p>Interactive session - discussing experiences, learning's, insights and sharing best practices. Session will be open and flowing, concentrating upon the following topics:-</p> <ul style="list-style-type: none"> <li>• Sharing of organisational structure, reporting lines and interfaces with other departments (e.g. legal, marketing, purchasing).</li> <li>• Skills of market researcher - primary vs secondary - a multi-skilled role or a specialised one?</li> <li>• Budget ownership versus budget control.</li> </ul>
12.30 - 13.30	Informal networking lunch
13.30 - 14.30	<p>A hot topic - EU privacy - ethical and legal aspects for pharmaceutical marketing research - David Trower - Chief Privacy Officer, IMS Health.</p> <p>We expect a lively debate and discussion focusing on the not so obvious impacts of the directives. The session will commence with a 20 minutes presentation, followed by informal discussion and debate.</p>
14.30 - 15.00	Networking coffee with Associate Members
15.00 - 16.30	Full Members & Associate Members Networking Presentation Meeting - 'Leadership and Teamwork - motivate, communicate, succeed and inspire' - Richard Denny.
16.30 - 18.00	Networking Cocktail Event



The Networking Event takes place at 15.00hrs.

### 'Leadership and Teamwork - motivate, communicate, succeed and inspire'

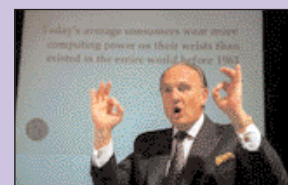
#### Speaker - RICHARD DENNY

EphMRA is proud to announce Richard Denny as the 2006 networking event Speaker. Richard is one of the most inspirational business speakers. His presentations are not only motivating, inspiring and educating, but his audiences take away and are able to use highly practical ideas that achieve enhanced performance.

EphMRA feels that all members could benefit from the wisdom of Richard and assist in higher achievement, performance and success.

Variously described in the media as a 'Guru'... 'Master' ...and 'The Legendary', Richard Denny is not a theoretician but a practitioner. He is in high demand as a consultant advisor and mentor to senior management operating across a wide range of products and services.

His business career involved selling and marketing in various sectors and countries. With all his vast experience he was continually being asked to speak and advise others, and this led to his very successful business training company being formed. Richard is recognised at the forefront of business training on selling, leadership and management, customer care and business growth.



Richard has authored and presented over 30 training videos. His 5 books - Selling to Win, Succeed for Yourself, Motivational Management, Speak for Yourself, Communicate to Win - are International best sellers translated into over 20 languages.

He is the creator and founder of British Professional Sales Diploma and the British Leadership & Management Diploma. His presentations are liberally illustrated with anecdotes, people stories and of course a touch of humour. Richard has the uncanny ability to delight any audience, probably because he talks common sense and has the knack of being a brilliant communicator.

What previous audiences said:

*"...the dust has just about settled on one of the most successful events to date."*

*"Our delegates were talking about your excellent presentation long into the night..."*

*"...the most dynamic and powerful presentation I have seen in 22 years."*

Register on line at [www.ephmra.org](http://www.ephmra.org) to attend in Brussels on 8 February 2006.  
The 2005 event was very highly rated and appreciated!

# WHAT MAKES A GOOD MARKET RESEARCHER?

Keep taking the PIL!

## 1) Passion

Are you really passionate about what you do? Are you willing to go the extra mile for the client and importantly do you want to go the extra mile for the company you are working for? Deep down do you really care what happens to your company? If your view is that it doesn't matter and you believe that you can always get a job somewhere else, then one has to seriously question if you are really committed and in the right profession?

Anyone who is a client or employer, has a right to want to work with someone who really has an inner desire to succeed to the best of their ability at whatever they do. There should be no short cuts if you have an internal passion about what you do.

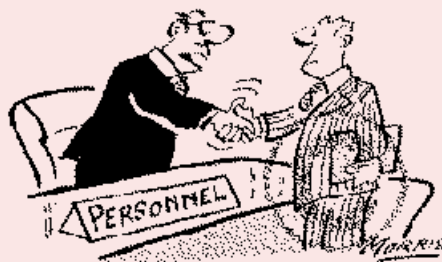
Some people have said you can only be passionate about what you do if you are running your own company. I do not subscribe to that view at all. There are many individuals that I have had the pleasure of knowing working in major corporations who have always acted as though they did own the company. They want "their" company and more importantly the staff working with them to succeed in their aspirations too. The passion should not only be to help one's company succeed, but about helping others optimize their career development.

## 2) Integrity

If there is no integrity in the nature of what someone does, either in their personal life or at work, then the whole foundation of being successful is doomed to failure. Honesty must always be the basis of what one does. In the market research field, if a project has gone wrong in some way, if an instruction was not adhered to, if a contractor has screwed up, NEVER COVER IT UP. When you are out on company business always do the right thing. Never take liberties with company expenses, never entertain colleagues in situations that could bring the company or yourself into disrepute.

Over the years I have been asked this question a number of times. Although I am sure that each person who has been involved in the industry would answer the question differently, this is my personal judgment about what helps to make a "good" researcher.

Each person who reads the article may like to reflect on whether they can "hand on heart" claim that they are 100% committed to each of the three elements that I believe sets one researcher apart from another. If not, then you should focus even more on these issues in the months and years ahead.



Honesty, hand in hand with integrity has to be earned over time. Once that has been established, just like most other things, it can easily be destroyed through a careless or unthinking act. In business, there are seldom any second chances. Thus, if you want to succeed just remember to treat integrity as the cornerstone of one's aims and you will find success follows.

## 3) Lateral Thinking

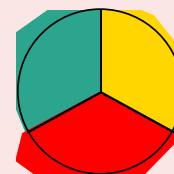
It is essential to be very well acquainted with as wide variety of market research techniques and procedures as possible. This means that those in Healthcare particularly need to constantly look outside the field at what is happening to solve marketing problems in other sectors of business.



The simple truth is that so many marketing problems that companies face are similar despite their "appearance". Consequently, it is vital to understand how other companies and industries have set about solving their problems. What technical solutions did they use? What different questioning procedures did they use, even if the approach was conventional IDI's or focus groups?

Involvement in the MRS diploma, MR courses, Workshops, and learning about techniques such as War Games, neurolinguistics, segmentation procedures to evaluate R.O.I. etc. are all challenging and help to shape an individuals knowledge in areas that they may feel uncomfortable. However, that is the key issue! Everyone interested in making their mark should feel challenged, even uncomfortable about understanding some of these complexities, but working through these is the only way to learn in order to emerge a better researcher.

If you are the sort of MR person who does not want to feel challenged and are happy with doing things the same way day after day, then you need to ask yourself if you are really in the right profession! Thus my three key elements for a truly successful marketing research career are passion, integrity and lateral thinking.



Becoming a Successful Market Researcher

Yellow: Integrity  
Red: Passion  
Teal: Lateral Thinking

One last consideration is to work from day to day with the attitude "do as you would be done by". Never ask anyone to do something that you would not be prepared to do yourself. This is an important way to motivate and help to manage the people around you. Most people who are in charge of others are not "taught" about managing people, many think it is something that they can learn. While it is true that certain aspects of management can be learned, using the old adage will help ones colleagues to respect those who manage, leading to increased commitment and the desire to become an integral member of the team.

Good Luck with your careers - I hope that even if you cannot claim to be at a level 100% on each of the three elements I mentioned, I hope you agree they are important enough to try to get to 100% and that you will not decide to change careers!!!

Allan Bowditch

A B Consulting LLC

allan.bowditch@abconsultingintl.com



# The 5 biggest mistakes in oncology forecasting

If you have been involved in oncology forecasting, you will know that it is perhaps the most complex and challenging disease area to forecast accurately. However, it *can* be kept reasonably simple, and your forecasts can enjoy reasonable accuracy *providing you avoid five key mistakes* that occur over and over in oncology forecasting. This article explains the errors and suggests ways to avoid them.

## Not modelling the right 'product'

The overriding paradigm in oncology is to attack the tumor in as many ways as possible. So, different treatment modalities (surgery, radiotherapy, drugs) are often combined. Moreover, drugs are very often used in combinations or 'treatment regimens'. It is these regimens that oncologists choose between and not individual drugs. Because oncologists choose amongst regimens, the regimen has to be the unit of analysis for market research and market modelling. Building a forecast based around products can sometimes lead to very wayward forecasts.

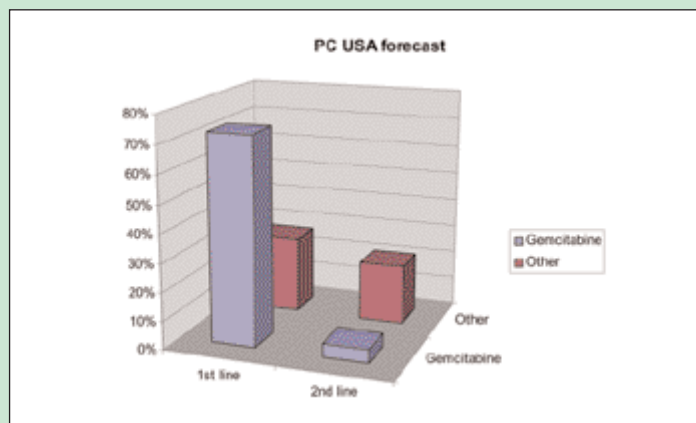
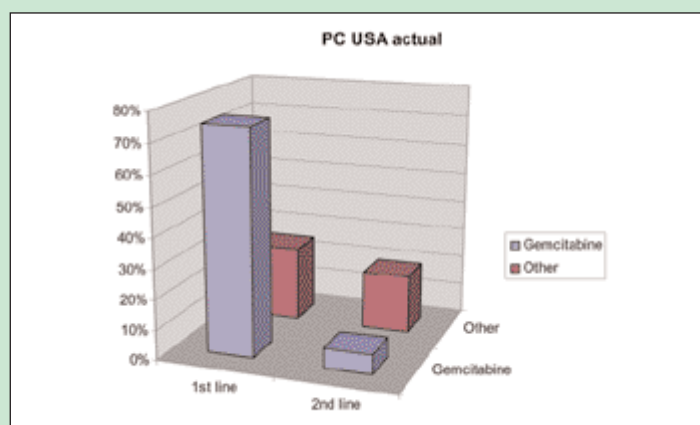
## Not accounting for 'share shadows' in subsequent lines of therapy

Oncologists often use more than one treatment regimen for a given patient. However, the process is fundamentally different to co-prescription in many other therapy areas. In hypertension, for example, a doctor will prescribe one type of agent (perhaps a beta blocker). If this does not achieve control of the patient's blood pressure, the doctor will add another type of agent (perhaps a calcium channel blocker). And so on, until control is achieved.

In oncology, the approach is fundamentally different. As mentioned above, oncologists often give patients a cocktail of drugs (a regimen). The tumor will, hopefully respond, but may, at a later date, progress again. At this point, the patient will be given a second line of therapy. However, tumors develop resistance to cytotoxic drugs and so, if a first line of therapy fails, the second line of therapy usually comprises different classes of drugs. Hence, a drug that enjoys a high share of first line therapy is unlikely to enjoy a high share of second line therapy.

To take a very simple example, Gemzar is the most active cytotoxic against pancreatic cancer. Hence, it is used to treat most patients as a first line agent. However, when it comes to second line treatment, most of the patients get other therapies.

It is a simple matter to model this. If we assume that those patients who have had Gemzar first line cannot receive it second line, we get a forecast that matches what actually happens rather well.



The calculations when we are dealing with many treatment regimens are quite complex – but fortunately there are Excel add-ins that will do this for you.

Market researchers often try to deal with this problem by researching the relative attractiveness of agents (usually with a conjoint) in a first line setting, a second line setting, and so on. This is very expensive and can actually lead to quite poor forecasts. The reason is that the choice of a second line therapy – as explained above – is hugely dependent on what the patient had as a first line therapy. Second line patients are not a homogenous group. Some received regimen A first line, some received regimen B first line, some received regimen C first line etc. Therefore, to successfully tackle the problem with a conjoint, you would need to do separate conjoints for those patients who got regimen A first line, for those that got regimen B, and so on. This is not a practical proposition. What we need to do is combine one simple conjoint with the calculations that deal with the 'share shadows' that first line therapy throw on second line therapies.

## Not handling off-label sales correctly

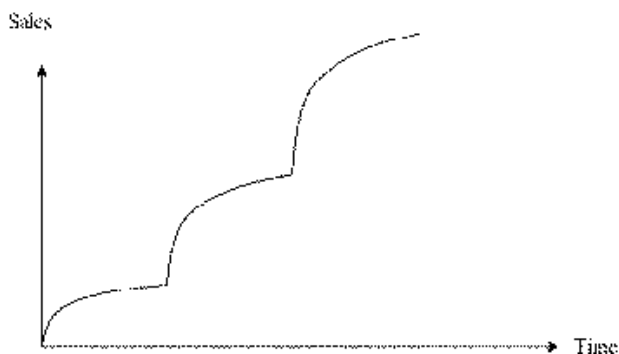
You cannot promote your product outside its registered label (although you used to be able to in the US if you were listed in one of the compendia that payers refer to). However, doctors can prescribe a drug for whatever indication they like (subject to the practical issue of getting payers to pay for it). This means that once your oncology drug is launched and data becomes available on not-yet-labelled indications, some doctors will choose to use it 'off-label' in some of their patients. Generally the level of use is way below the level of use seen when the product has a label. One reason for this is that you can promote an on-label indication, but not an off-label indication. Therefore, you should forecast off label sales as a percentage of on-label sales. It is best to base this on the historical record for products in the country/tumor in question. Surveys are not as helpful in predicting this multiple. It's the old saw of actions speaking louder than words.

## Not assuming fast enough uptake

Products achieve their potential in a given indication over time. The shape of oncology uptake in a given indication tends to be a rather rapid 'r-shaped' curve. However, the uptake of oncology products may not look as fast as it really is. The reason is that many oncology products are rolled out in a number of indications. Each one has its own (usually fast) uptake curve. But, because, these indications are spread out in time, the uptake for the product looks slower than it actually is...

*continued >>*

A series of fast uptakes can look like one leisurely uptake...



The solution is to model each indication separately.

### Not getting the right drivers in a scientific, data driven market

There are three major drivers of market share for pharmaceuticals. These are product profile (how useful your product is relative to your competitors), entry order and promotional support. The impact of these three drivers varies from therapy area to therapy area and from country to country in a reasonably predictable way. In oncology, the impact of product profile is relatively more important and the impact of entry order and promotional support is relatively less important (as compared to the average therapy area). Good forecasting is usually about avoiding simple traps and these are five that you would do well to look out for in oncology forecasting.

**Gary Johnson**

Inpharmation

gary@inpharmation.co.uk

## Facts & Figures

about the Newsletter publication

Deadline for Advertising in the March 2006 News is January 20th 2006.

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).

## CONTACT US

By phone, fax or email...

Bernadette Rogers, Minden House, 351 Mottram Road,  
Stalybridge, Cheshire SK15 2SS, UK.

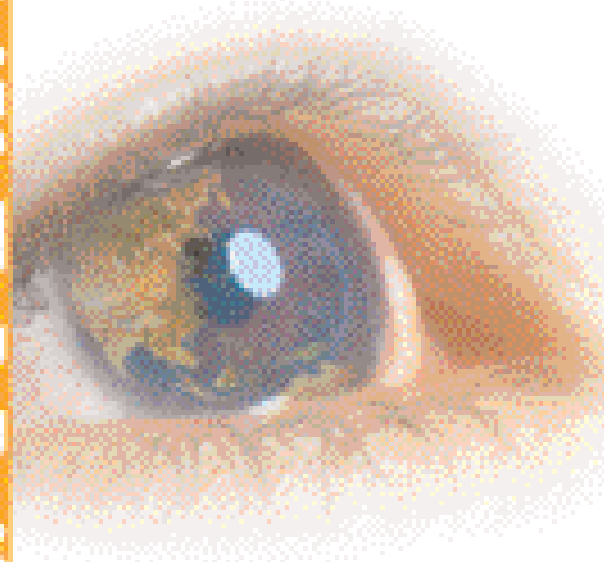
Telephone: +44 161 304 8262 • Fax: +44 161 304 8104

E-mail: MrsBRogers@aol.com

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# Changes and Trends in Panel/Omnibus Research

Panel-based and Omnibus research have been undergoing significant change over recent years. Changes pertain to methodology, the progress of online research, the evolving nature of research buyers' information needs, and the changing landscape of suppliers.

This article highlights a few areas of change and some significant trends in an attempt to generate a debate on issues pertaining to panel/Omnibus research.

## Beginning at the beginning - definitions

A true panel is a group of respondents who meet certain demographic criteria, who are recruited for a specific purpose and whom users would go back to repeatedly over time. Therefore recruitment will be skewed towards the objective of setting up the panel. Objectives can be specific, including for example setting up a panel of high prescribers of a certain product, or much broader, including researching a sample that is representative of the universe of the audience targeted. Going back to the same panellists for the purposes of market research is one of its main distinguishing features, which also differentiates this approach from random sampling, the method most commonly used in quantitative ad hoc research.

An Omnibus is a cost-effective means of collecting quantitative data from a nationally representative sample of a given population. Cost-effectiveness for users is achieved by sharing the cost of research. Because it is based on random sampling, an Omnibus, unlike a panel, is a suitable vehicle for Attitude & Awareness tracking.

## Trends in panel/Omnibus research

The vast majority of quantitative research is still based on random sampling. Current estimates suggest that 15% of all quantitative research is syndicated. There is a difference however between traditional Omnibus type of research and syndicated research using panels. Whereas Omnibus research has been gradually plateauing and perhaps even decreasing, syndicated research using panels, however, has witnessed a steady growth.

Reasons behind the plateauing or decrease of share in true Omnibus research are multiple. Two major reasons involve timing and budgets. Access to true Omnibus research used to be based on subscription. Tighter time-lines and budgets for buyers, as well as the provision of data in a more user friendly format, have rendered the traditional approach to Omnibus usage somewhat obsolete.

In addition, our contention is that online research is a major driver of the simultaneous growth in panel research. Increasing familiarity with the benefits offered by online research, containment of costs and increasing penetration of internet access amongst healthcare professionals across the G7 are fuelling this growth.

## The Growth of online research

Usage of online research has been growing, whereas face-to-face methodologies and telephone interviewing have remained fairly static or, in some cases, even decreased. To some degree, it can be argued that consumer/patient research has also been growing owing to the increasing accessibility of online work.

However, online research is a double-edged sword. Penetration of internet access amongst healthcare professionals is now 90% or more in some key markets e.g. the USA, UK, Germany and France. Although somewhat lower in some other markets, e.g. Spain and Italy, it is still growing all the time.

At the same time however, an increasing proportion of healthcare professionals who have online access, choose not to participate in market research surveys online. This is a trend that would be worth investigating for better understanding by online/panel research providers and research users alike.

For providers of online research, whereas there are definitely key advantages in setting up their own in-house panels, including bypassing access or rental charges for use of panel members; costs to set up and maintain such a resource are significant enough that providers need to carefully balance costs with expected returns regarding volume of work and drop-out rates.

As a result, the provider landscape has been changing and is likely to change further in the next few years as the market for panel research matures towards a natural balance between offer and demand.

Online panels or web-based communities of physicians are here to stay because of lower costs in setting-up and conducting research and possible quicker turnarounds, depending on recruitment specifics and complexity of the research. Because of much lower overheads to set up discrete studies compared with setting up studies using more traditional approaches, it could be argued that the days of true Omnibus as a vehicle for quantitative

research are numbered. Where previously cost sharing was a pre-requisite to research affordability for potential research buyers, buyers can now contemplate collecting data with a similarly large sample size but as single buyers. Omnibus services have therefore largely become ad hoc services, thus paradoxically increasing potential competition for panels.

However, online panel research remains more flexible and cost-effective than traditional Omnibus or face-to-face panel research in that, for example, it allows research amongst mixed-samples, or research that increasingly replicates the depth of face-to-face interviewing through multi-media application.

## What does the future hold?

Challenges faced by providers of panel/Omnibus research are significant. Market presence is increasingly driven by resources, for example the availability of scriptwriters to allow delivery on speed. In a more mature, competitive market, attracting the right volume of work for commercial success is also going to be dependent on providing additional value, i.e. deliverables that genuinely help research users with further insights into their markets, at a cost that remains truly competitive in terms of both competitor offering and other, more traditional methodologies.

In addition, on the demand side, online panel/Omnibus research is filling a need gap that comprises a desire for urgent information, very specific, ad hoc information needs and tighter budgets that have to meet stakeholders' evolving information requirements.

In other words, the stakes for online panel/Omnibus research to sustain growth and further indent into the quantitative research market will keep getting higher.

In this context, company size and resource back up will continue shaping the offer and panel/Omnibus research, thanks to online methodologies, will increasingly be used as ad hoc tools at syndicated prices.

**Gary King**  
gary.king@gfk.com

**Martine Leroy-Sharman**  
Martine.Leroy-Sharman@gfk.com

GfK HealthCare



# UPDATE FROM THE CLASSIFICATION COMMITTEE

## EphMRA ANATOMICAL CLASSIFICATION GUIDELINES 2006

Summary of Proposed Classes

Proposed EphMRA ATC Code/Description Changes 2006  
Updated 19th October 2005

### New Codes, Deleted Codes and Altered Descriptions

#### NEW CODES

- C10C** LIPID REGULATORS IN COMBINATION WITH OTHER LIPID REGULATORS
- C11A1** LIPID-REGULATING CARDIOVASCULAR MULTITHERAPY FIXED COMBINATION PRODUCTS
- C11A2** LIPID-REGULATING CARDIOVASCULAR MULTITHERAPY COMBI-PACK COMBINATION PRODUCTS
- G3J** SERMS (SELECTIVE OESTROGEN RECEPTOR MODULATORS)
- G3X** OTHER SEX HORMONES AND SIMILAR PRODUCTS
- N6A4** SSRI ANTIDEPRESSANTS
- N6A5** SNRI ANTIDEPRESSANTS
- N6A9** ANTIDEPRESSANTS, ALL OTHERS
- S1P** OCULAR ANTINEOVASCULARISATION PRODUCTS
- V3E** ANTIDOTES
- V3F** IRON-CHELATING AGENTS
- V3G** HYPERKALAEMIA/HYPERPHOSPHATAEMIA PRODUCTS
- V3H** ANTI-INFLAMMATORY ENZYMES
- V3X** ALL OTHER THERAPEUTIC PRODUCTS

For Germany and Hungary only:

- V3X1** UMSTIMMUNGSMITTEL PREPARATIONS OF HERBAL ORIGIN
- V3X4** 'CURE-ALL PREPARATIONS
- V3X5** HOMEOPATHIC PREPARATIONS (1)
- V3X6** HOMEOPATHIC PREPARATIONS (2)
- V3X7** DRIED AND CUT PLANTS FOR TEA PREPARATIONS
- V3X9** OTHER THERAPEUTIC PREPARATIONS
- V10** THERAPEUTIC RADIOPHARMACEUTICALS
- V10A** THERAPEUTIC RADIOPHARMACEUTICALS

#### DELETED CODES


- G3H** OTHER SEX HORMONES AND SIMILAR PRODUCTS
- M6** ANTI-INFLAMMATORY ENZYMES
- M6A** ANTI-INFLAMMATORY ENZYMES
- N6A1** ANTIDEPRESSANTS, EXCLUDING HERBALS
- S1J** WET AMD TREATMENT PRODUCTS
- V3A** ALL OTHER THERAPEUTIC PRODUCTS

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#### DELETED CODES CONTINUED

For Germany, Hungary and Austria only:

- V3A1** UMSTIMMUNGSMITTEL PREPARATIONS OF HERBAL ORIGIN
- V3A2** ANTIDOTES AND EMERGENCY KITS, EXCLUDING ANTINEOPLASTIC DETOXIFYING PRODUCTS
- V3A4** 'CURE-ALL PREPARATIONS
- V3A5** HOMEOPATHIC PREPARATIONS (1)
- V3A6** HOMEOPATHIC PREPARATIONS (2)
- V3A7** DRIED AND CUT PLANTS FOR TEA PREPARATIONS
- V3A9** OTHER THERAPEUTIC PREPARATIONS
- V3C** RADIOPHARMACEUTICALS

#### ALTERED DESCRIPTIONS

- B2G** SYSTEMIC HAEMOSTATICS
- C11** CARDIOVASCULAR MULTITHERAPY COMBINATION PRODUCTS
- C11A** LIPID-REGULATING CARDIOVASCULAR MULTITHERAPY COMBINATION PRODUCTS
- J1** SYSTEMIC ANTIBACTERIALS
- J1X** OTHER ANTIBACTERIALS
- J1X1** GLYCOPEPTIDE ANTIBACTERIALS
- J1X9** ALL OTHER ANTIBACTERIALS

# UPDATE ON PRM&T ACTIVITIES

Janet Henson - [janet.henson@wanadoo.fr](mailto:janet.henson@wanadoo.fr)

## Members Update

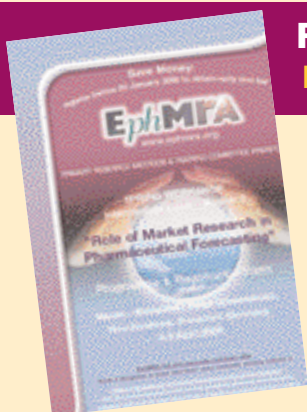
Welcome Steve Burrows from Novartis Pharma, Switzerland.

Goodbye and thank you to Cecile Ecoffet from UCB, Belgium.

## PRM&T Training Courses Go Paperless

From now on all training course registration materials, and information will be conveyed to you via email and the Internet.

In future you will receive an email informing you of new courses. Within the email there will be direct link to the EphMRA Website where you can register on-line and obtain full programme details and logistics.



**Register on-line now for the PRM&T Spring 2006 Workshop**  
**EARLY BIRD CUT-OFF ENDS 20 JANUARY 2006**

## "Role of Market Research in Pharmaceutical Forecasting"

### Introduction

The pharmaceutical industry represents a very dynamic yet fluctuating market that is very challenging to analyse and predict. Market drivers are diverse, ranging from government regulations to the introduction of drugs or diagnostics that influence the course of diseases.

With the cost to launch a new drug over \$800 million we no longer have the luxury of maintaining large drug portfolio pipelines. Forecasting and modelling market dynamics is an increasingly important function used to develop and support the clinical development of drugs. In addition to new products forecasting, in-line analysis of current drugs is critical to ensure that past analyses reflect current and future market drivers. Therefore, it is imperative to analyse not only the historical market, but to predict the evolution of the market with accuracy by incorporating a multitude of market events that impact the future.

### Course Objectives

The aim of this course is to focus on the role marketing research plays in the forecasting process; therefore it is unique in addressing this role. The course is envisaged almost like a case study from inception to read out, and how marketing research inputs along the process.

The course objectives will be achieved via speaker presentations and through interactive discussion sessions, addressing issues of relevance for delegates in their daily work in order that they can better contribute to forecasting implementation.

The course will provide:

- An understanding of the basic fundamental principles of pharmaceutical forecasting and the essential role of the marketing research function
- The role of forecasting in the organisation and through the product lifecycle
- A review of good forecasting practices and strategies
- Advice on how to determine and select the most appropriate forecasting technique
- An overview of the analytical and practical tools for forecasting
- How to cope with new indications, including the exotic and extreme
- Hands on guide to quick forecasts
- How to achieve buy in and sell forecasting to end users
- Best practices to ensuring forecasts are implemented and successfully
- How to maximize role of marketing research in making successful forecasts

### Who should attend?

The target audience for this intermediate course is:

- Pharmaceutical market researchers
- Pharmaceutical marketers
- Pharmaceutical strategic planners

The course is suitable for both Pharmaceutical companies and agencies.

### Location

The course will take place at the Kempinski Hotel Gravenbruch, Neu-Isenburg, Frankfurt, Germany.  
Telephone +49 69 389 88 744  
Fax +49 69 389 88 911

The hotel is situated in its own 150,000 square metres park with a beautiful lake. It is 15 minutes away from Frankfurt airport and 5 minutes from the next highway and 20 minutes from Frankfurt city center. The hotel offers a free shuttle service from the airport from 6.30 until 22.00 everyday.

### Convenors & Organiser

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

**Ulrich Wuesten** - Bayer Healthcare, Germany.

**Alexander Rummel** - Psyma International Medical Marketing Research GmbH Germany.

**Werner Gorath** - Altana Pharma, Germany.

**Janet Henson** - Workshop Organiser, France



## HOW YOU CAN BECOME INVOLVED IN THE PRM&T COMMITTEE WITHOUT BEING A MEMBER

There are many ways you can be involved in the activities of the PRM&T Committee – here are just some:-

- We are always looking for course and workshop speakers
- Course and workshop convenors is another way to become involved
- We regularly update and extend our publications – contributors are always welcome



## There is still time to book for the following courses

### Introduction to International Pharmaceutical Marketing Research

31 January – 2 February 2006 – Brussels, Belgium

#### Introduction

The aim of this course is to enable delegates to understand the principles and practices of Pharmaceutical Marketing Research.

At the end of the course all delegates should have a basic grounding in the course sessions topics below:-

- Session One** The Role and Scope of International Pharmaceutical Marketing Research
- Session Two** International Sources of Data
- Session Three** The Product Lifecycle – the Role of Marketing Research
- Session Four** Types of Primary Market Research and Translating Business Objectives into Research Objectives.
- Session Five** Commissioning Marketing Research and optimal utilisation of Marketing Research within the company.

#### Course Objectives

On completion of this course delegates should have an understanding of:-

- Pharmaceutical MR and its uses
- Different types of MR
- The scope of MR, clearly differentiating between the role and character of qualitative and quantitative research methodology
- The role of MR and its clients
- The role of MR in business decisions
- The fundamental elements within research practice
- Using research findings to make a difference

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



### Understanding and Using Desk Research

1st – 2nd February 2006 – Brussels, Belgium

#### Introduction

In answering business questions, pharmaceutical company researchers need to have a good understanding

of sources available and which type of sources can be utilised for specific business questions. For example, in making decisions about business 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 is a systematic examination of all available sources and data in the context of a particular business / marketing research problem. Sources for desk research are practically endless: include epidemiology data, audit/panel data, all published statistics etc. We will be including a review of desk research sources in the workshop.

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 scope of desk research, problem definition/clear objective setting and defining and reviewing of types of desk research sources 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. Final section is designed to give an understanding on how analyses from available sources can be integrated into models. 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

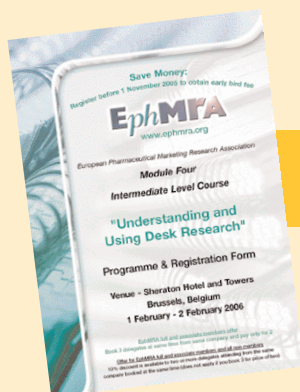
At the end of the workshop, delegates will understand:

- 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 and how to integrate primary and secondary research data

#### 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. 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.

**Course Convenors:** Semra Grundy - Allergan, UK, Janet Wagster - J Wagster Consulting, UK and Steve Burrows - Novartis Pharma, Switzerland.



# FOUNDATION UPDATE - News from the Foundation Board

The EphMRA Foundation has been established to support and fund original projects in the international healthcare marketing research and business intelligence fields. EphMRA Member companies will be able to benefit from these added value projects since they will provide incisive information and knowledge and address important issues - relevant to the Industry today and tomorrow.

The EphMRA Foundation retains full copyright and publishing rights to each completed project and will publish the findings to all EphMRA Member Companies and any other relevant parties. Joint projects are also undertaken with our allied organisation, PBIRG.

## Board Vacancies

There is currently 1 vacancy on the Board for a Full company member we are looking for interested and motivated members to support the Foundation in its role.

Applications are invited – please use the Foundation Application form available from the web site at [www.ephmra.org](http://www.ephmra.org)

## Foundation Board Members and Profiles



**Su Meddis**  
AstraZeneca, UK - Chair  
Business Analyst  
Member since January 2005



**Sally Birchall**  
Chugai Pharma Europe, UK  
Associate Director,  
Marketing Research  
Member since January 2005



**Jeremy Lonsdale**  
Aequus Research, UK  
Director  
PRM&T representative



**Sue Marett**  
The Research Partnership, UK  
Member since June 2005



**Dan Fitzgerald**  
GfK US Healthcare Companies Group,  
Executive Vice President,  
Associate Members Group Contact,  
Member since April 2005

Dan has 25 years of experience in operations, including 16 years in market research specifically serving the pharmaceutical and healthcare markets, both domestically and internationally. Over the course of his career, his responsibilities have encompassed all aspects of operations including customer service, finance, legal, human resources and information technology. Some of his most recent experiences include the establishment of the U.S. offices of a multi-national market research company based in the United Kingdom.

I am specifically interested in the Foundation because my experience would support contributions in the areas of benchmarking, customer satisfaction and the cultural aspects of Market Research. The cultural aspects of market research especially intrigue me because of the impact on relationship marketing in the ever expanding global marketplace. Hopefully my operational perspective lends value as it pertains to implementation and execution of quality research throughout the varied countries in which we work. Lastly, I see the Foundation as an effective way to assist in the dissemination of valuable information that will improve the quality and effectiveness of research for the pharmaceutical industry.



**Angela Duffy**  
The Research Partnership, UK, Director  
Member since June 2005

Angela joined The Research Partnership as a Director in 2004 after 15 years at Martin Hamblin GfK, latterly as MD of Healthcare. Prior to this she worked for a consumer qualitative agency which has helped in developing her interest in the role of the patient in pharmaceutical marketing. Angela has spoken at and contributed to a number of industry conferences and seminars on topics ranging from the Use and Abuse of Projective Techniques, to Key Learnings from Consumer Branding for the Pharmaceutical Industry.

Angela's aim in joining the Foundation is to help interest and involve newer and younger researchers in EphMRA in general and in Foundation projects specifically in order to ensure our market research industry does not stagnate.



**Dr Philip Stern** BSc (Sussex), MSc, PhD (London)  
Senior Lecturer in Marketing and Strategic Management  
at Warwick Business School and Academic Director of  
the Executive MBA programme.  
Academic Foundation Board member since October 2005

Philip's research is focussed on Market Segmentation, the Pharmaceutical Industry and the prescribing behaviour of General Practitioners. His publications include articles in Marketing Letters, Long range Planning, OMEGA, Journal of Brand Management, Journal of Marketing Education, British Journal of Management, International Journal of Medical Marketing and Marketing and Research Today.

Dr Stern is an active consultant and his pharmaceutical clients have included a range of major companies. As a previous recipient of a Foundation award Philip is keen to make a contribution to the development of this part of EphMRA's work and hopes that an academic perspective will help shape projects in the future.



**Bernadette Rogers**  
EphMRA General Secretary

Support role involves:

- support and liaise with the Board Chair re Foundation activities
- organise and initiate meetings for Board and projects undertaken.
- take and issue meeting minutes
- write and produce any RFPs following Board outlines
- liaise with PRM&T rep ensure smooth interaction and translation of suggestions into practice
- ensure appropriate PBIRG contact
- help to recruit members when Board vacancies arise
- organise the Foundation section on web site
- write a Foundation Update for the EphMRA News to increase awareness of the Foundation's work

*continued >>*

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# FOUNDATION UPDATE - News from the Foundation Board

## How You can Help the Foundation

1. Proactively make suggestions for topics and projects
2. Apply to join the Board when vacancies are advertised
3. Work as part of a Foundation Project Team – we email out asking for volunteers to help work on our projects. This means that you can become involved in the work of the Foundation but do not have to commit to being a full Board member.
4. Give feedback and input on the value and utility of current projects.

## 3. Internet Access Amongst Physicians

Practically all of us open up our Internet access almost every working day and probably surf the web in the evenings dipping into a wide range of web sites for information, shopping, the news etc. We work in an environment which demands the use of mobile phones, remote access to emails and increasingly the use of hand held Blackberry type devices.

We know from published sources that data is available which informs us about how many consumer households have Internet access and regularly access web sites. But what of the physician population – to what extent do we independently know whether or not they have any/intermittent/regular Internet access? We know from a variety of sources that physicians in some European countries have more regular internet access than others – but where is the evidence for this?

This Foundation project initiated by EphMRA would like to establish more reliable data to demonstrate the extent to which physicians have Internet access. The study results will have a myriad of uses in our day to day work and one obvious impact would be on sampling for Internet studies and other MR projects.

This Foundation project aims to determine the extent to which specified physicians have access to the Internet.

## Projects being Undertaken

### 1. Doctor Statistics Report Update - EphMRA/PBIRG Project

EphMRA/PBIRG sent out a Request for Proposals and received a number of proposals which are being followed up.

However we still need proposals for the following projects:

#### Project 2

A new report on Doctor Statistics - featuring Sweden, Finland, Denmark, Norway - grant of 7000 euros.

#### Project 4

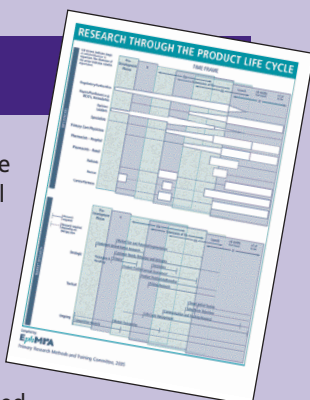
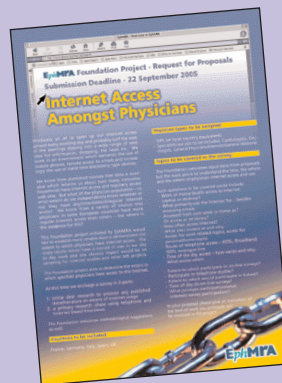
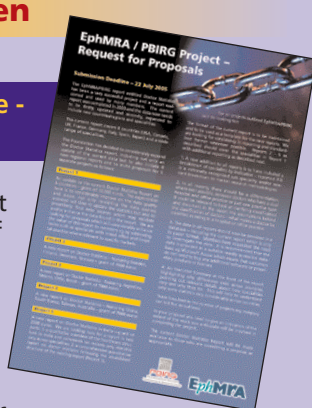
A new report on Doctor Statistics - featuring China, South Korea, Taiwan, Australia - grant of 7000 euros

Please see the full RFP on the web site for full details - [www.ephmra.org](http://www.ephmra.org)

### 2. Research through the Product Lifecycle - Update for Q1 2006

This Foundation project sprang from the paper based PRM&T publication and wall chart Research through the Product Life-cycle. A need was identified to create a web based Compendium of research sources.

A Product Lifecycle Compendium was published to the EphMRA web site in 2004, which made available a web based compendium of lists of useful articles, book, web sites and other reference materials to enable market researchers to find relevant and reliable information.



In response to the distributed RFP EphMRA received 5 high quality proposals and then drew up a short list of 2. At the time of going to print, these 2 proposals were still being evaluated by the Foundation Board but the successful agency will be announced as soon as possible.

## Completed Foundation Projects

**2003**

### Research Through the Product Lifecycle - Research Reference Compendium/Wallchart

conducted by J.Wagster Consulting

The aim of this project was to create a web based compendium of lists of useful articles, books, web sites and other reference materials so that when researchers wish to find information on say Pricing Research or Segmentation etc you can go to the Research References and web link to relevant information.

**2003**

### Doctor Statistics Report

conducted by Schmitow Ubeira, Spain.

**2003 - 2005**

### What makes Market Research Useful [or not] to Product Managers

conducted by Synovate Healthcare

This study aims to explore and identify what drives perceptions of value of Market Research amongst end-users within pharmaceutical companies.

The original focus of the project was on local and international Product Managers. The methodology is qualitative, using 16 in-depth interviews.

**2001**

### Verification of the Internet as a Research Tool

conducted by P/S/L Research

Pharmaceutical executives need to make the best decisions they can within the business environment of the early 21st Century. To help them do this, market researchers will more and more be expected to understand the research environment afforded by the Internet so that they can provide accurate and fast information, often at a global scale. This research project was designed to help meet this need and was undertaken in France, Germany, Italy, UK and the USA.

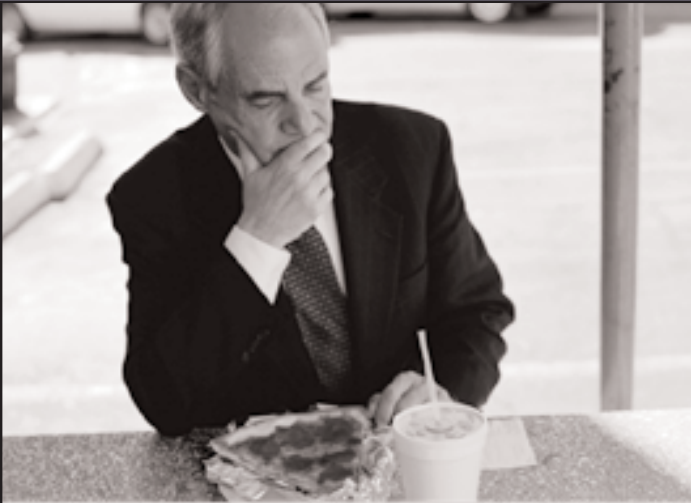
**1999**

### Assessing the Cultural Impact on How Questions are Answered: An Application of Bias Correction

Conducted by Total Research

This programme of original research was conducted with objectives to address the following:

- How real is our qualitative sense regarding the cultural differences in how physicians respond to a quantitative battery of questions when assessing impressions and prescribing intent after concept exposure?



“  
**Roughly one-third of patients**  
with severe diabetes\* feel completely helpless when it  
comes to preventing their illness.”

**Who knew?**

The National Health and Wellness Survey  
is a rich database that provides powerful  
insight into how patients flow into and  
through physicians' offices. In 2005, NHWS  
included 79,930 respondents (USA & Europe).  
Now part of The Zimmet Group, NHWS  
has a suite of new products and services.  
Go to [NHWSurvey.com](http://NHWSurvey.com) to learn more.

\*2004 survey

**NHWSurvey.com** **National Health and Wellness Survey**

**You think you know...**

- If significant differences do exist, can they be quantified and adjusted to provide more accurate interpretation of intended behaviour?
- Do the cultural nuances that describe these response behaviours differ greatly between physicians and consumers, in general?
- Can algorithms developed to adjust for cultural differences observed in consumer research be applied to physician studies in ethical pharmaceuticals?

**1998**

### Perception and Reality in Prescribing

conducted by Warwick University, Dr Philip Stern

This project aimed to provide benchmarks against which pharmaceutical marketers can both plan and evaluate their marketing programmes for both existing and new ethical medicines. Also to examine how closely survey-based research reflects actual prescribing behaviour. Surveys using self-reported behavioural and attitudinal data form the bedrock of the pharmaceutical marketing planning process. If actual GP prescribing behaviour differs from that which is self-reported, then the predictive power of much current research could be improved by bearing these differences in mind.

# ASSOCIATE MEMBERS UPDATE

Earlier this year, the Executive Committee decided to initiate the formation of an Associate Members Board.

This year we are approaching almost 100 Associate Members of EphMRA - a very high growth rate in membership levels has been experienced given that membership was only introduced in 2001.

The members come from a range of types of companies - from the largest full service agencies to one person consultancies and fieldwork suppliers. Members are both nationally and internationally focused.

The Executive Committee has worked well over the past 2 years with the Associate Members Working Group and its representatives in addressing issues of importance to Associate Members and bringing topical items to the attention of the Executive.

However, given the need to consult with the large membership base EphMRA is moving to establish an Associate Members Board - consisting of 4 individuals from Associate Member companies.

This Board is being established now and Associate members were asked to vote on the candidates with one vote per Associate Member company. There were 6 candidates for the 4 positions. EphMRA hopes that members of the Board will come from across the spectrum of member companies in order to be able to represent the views of the cross section of members.

The elected Board members will be announced shortly.

In 2006 at the annual conference in Athens, EphMRA will not be offering a Goody Bag to pharmaceutical company delegates.



## PeopleNEWS



PS&L Research Europe announces the appointment of Vicky Mclellan as Client Service Director. Vicky brings a wealth of international research experience from GfK NOP (Martin Hamblin) where she was an Associate Director, and Silver Fern Research prior to this time.



DOUBLE HELIX DEVELOPMENT

The following new appointments have been made at Double Helix Development - UK office:-

- Patricia Thornton as Consultant - International Market Research, with prior experience at Genactis, Migliara Kaplan and PricewaterhouseCoopers.
- Lisa Taylor as Research Manager, with prior experience at GfK Martin Hamblin and The Planning Shop.



In October 2005, Ignacio Macias, former division manager of GfK Madrid, became Managing Director of PsyMA Iberica Marketing Research S.L., a new subsidiary of PSYMA GROUP AG, covering qualitative and quantitative projects for the business sectors IT, communication, finance, FMCG and health research.



**GENACTIS**  
Generating Action for Success



Genactis welcomes Christine Corner as Managing Director of Genactis Ltd. She will be based at Genactis' new offices in Marylebone. Christine brings a wealth of experience to the Group and as well as heading up the UK operation will be leading Genactis' Qualitative Centre of Excellence.



Tracey Brader has joined Praxis Research and Consulting as a Branding Consultant. Although Tracey began her career in research, she has spent almost twenty years in advertising agencies. Tracey also holds an MBA.



Praxis Research & Consulting Ltd have appointed Angela Thornton as Research Director. Angela, who has a degree in psychology, has held senior positions in several agencies, including MORI and Research International, over the last 15 years.

**RONIN**  
CORPORATION

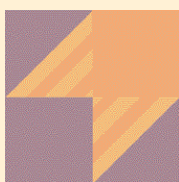


RONIN Corporation announce the appointment of Marek Vaygelt as UK General Manager. Marek has over 20 years' experience in the market research industry. He was most recently Director of European Operations at HI Europe, the UK arm of Harris Interactive.





Sharpstream Life Sciences announces the opening of a North American office in Philadelphia which is headed by Henry Miller, Managing Director. The office will initially be staffed with three search consultants. Martin Reynolds, CEO, continues to manage the European business.



Will Hau has joined EvaluatedPharma as European Sales Director. Will has a wealth of experience in the Pharmaceutical industry, having worked for Datamonitor, Adis and IMS.



In September, Valentina Proietti joined Medi Pragma, as Key Account Manager. She is a graduate in engineering and has a solid education in Pharmaceutical-Health sector and also in geomarketing and DataBase Management, and Quality Management Systems.



Jo Newell has recently joined Essence Health. She has over 11 years' experience in the pharmaceutical industry, both client and agency. Prior to joining Essence, Jo worked for TNS Healthcare, as a Director specialising in qualitative research.



Branding Science announces the appointment of Matthew Newman as Research Director. Matthew was formerly Account Director at Insight Research Group and his experience spans 8 years working in pharmaceutical and consumer market research.



Ruth Mullarkey (née Warren) has also joined the team as Field Manager. Formerly UK and International Field Manager at Context Research International, Ruth brings 15 years of experience in the field sector of market research.



Medefield Europe announce the appointment of Asif Javed to the position of Managing Director. Most recently with Adelphi Research International, Asif has a solid understanding of the requirements for global online market research.

Daniela Dodaro has joined Medefield Europe as Account Director. Previously with Fieldwork International where she was most recently Marketing Manager, Daniela brings to the Medefield team over ten years of global fieldwork expertise.



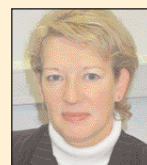
GfK Market Measures  
GfK Strategic Marketing  
GfK V2  
GfK U.S. Healthcare Companies LP



GfK has appointed Richard B. Vanderveer as Group CEO to lead the newly formed GfK U.S. Healthcare Companies. Vanderveer, who will also remain CEO of GfK V2, will manage together with Bart Weiner (appointed Group COO) the three companies under GfK USHC.



GfK Healthcare has appointed Udo Gock as Research Manager. Udo has 15 years market research experience and joins from Icon Added Value where he focused on international brand and communications tracking, copy testing and brand value management.



Christine Brignall has joined TNS Healthcare as Senior Director responsible for managing the global syndicated studies business. Christine has a wealth of experience in building syndicated database offerings, having previously worked as head of the hospital business with IMS Health.



Sue Marett is joining The Research Partnership as a Director from GfK MH where Sue worked as a divisional director. Prior to this Sue worked at Isis (now Synovate Healthcare), MORI and on the client side at Schering. She has over 14 years' experience in the pharmaceutical industry.



Christin Firchau has also joined The Research Partnership as an Associate Director from GfK MH, having previously worked at MMR. She has over 6 years' experience in pharmaceutical market research.



All Global Viewing recently celebrated the successful completion of its first year in operation. The facility, based in central London, has five viewing rooms and offers simultaneous Focus Vision capability.

All Global Online recently launched its European Online Physicians Panel which has 50,000+ Healthcare Specialists and professionals as members of this interactive community.



Genactis Ltd announces its move to new offices at: Sentinel House, 16 Harcourt Street, London W1H 4AD. The offices are very close to five major tube lines and a few minutes from Paddington.



RONIN now offers a state-of-the-art-focus group facility as well as CATI and Web data collection from its offices in Victoria, London. The new facility, housed in a converted church, caters for focus groups, depth interviews and qualitative recruitment.



GfK Market Measures  
GfK Strategic Marketing  
GfK V2  
GfK U.S. Healthcare Companies LP

GfK has formed the "GfK U.S. Healthcare Companies" (GfK USHC), comprised of three companies, GfK Market Measures, GfK Strategic Marketing (both formerly part of NOP) and GfK V2.



Synovate Healthcare announces the opening of their first office in France in October 2005. Clarissa Del Pup has been appointed as the new Director of Synovate Healthcare France

Synovate Healthcare has launched an Inflammatory Bowel Disease Monitor and Global Psoriasis Monitor in both the US and Europe and these form part of their autoimmune Therapy Monitor portfolio.



#### TNS CardioMonitor

CardioMonitor has recently collaborated with Harvard Medical School who are using CardioMonitor to help the practice of cardiology on a worldwide basis.



Brand Health International - from November 2005, the combined Huntsworth Health research agencies of Context Research, root research and Brand Health International will be fully integrated and known as Brand Health International; located together at offices in Harpenden.

#### Answers Pharmaceutical Marketing

Research & Consulting have opened a new facility in the centre of Berlin at the Gendarmenmarkt. The English speaking team there work in a facility allowing up to 3 FocusVision Sessions simultaneously and offer top class catering.



## Interested in submitting copy for the News?

If you would like to submit copy for possible publication in this Newsletter then contact EphMRA at [MrsBRogers@aol.com](mailto:MrsBRogers@aol.com).

Guidelines for articles and copy are available.

EphMRA reserves the right to edit/adjust any material submitted.

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