

# EphMRA NEWS

EUROPEAN PHARMACEUTICAL MARKETING RESEARCH ASSOCIATION

Issue: March 2005

## STARTING 2005 *with an* INTERIM MEMBERS MEETING



2005 started for EphMRA with a new initiative – an Interim Members meeting and Networking event held at the Sheraton Hotel, Brussels Airport, on 20th January. The day started with productive meetings for both Full and Associate members – each meeting was held separately and discussed a wide range of topics. The Full members

met in an informal group, discussing issues relating to company business and exchanging views on challenges facing departments. Discussions lead on to address interactions and progress with data suppliers, EphMRA training activities, and future conference venues. François Feig, Merck KGaA gave an insightful presentation in a cross fertilisation session entitled 'A Case Study of how to maximise the profile of the Marketing Research Function from member companies'. This too encouraged open discussion and exchange of views in a positive and productive manner.

The Associate members met separately and had a packed agenda covering a wide range of membership issues as well as addressing ideas for future Foundation projects.

A Networking Coffee and Lunch both featured and then a lively presentation by Jan Hofmeyr entitled 'Building Brands that Last – Lessons from the Histories of the World's greatest brands'. Jan's slides are available on the EphMRA web site for members – [www.ephmra.org](http://www.ephmra.org).

The day was complimented by a Networking cocktail event with time for social discourse with colleagues from companies and agencies. We will feature a full report in the next News once the meeting evaluation results have been digested.

And so now we are looking ahead to our annual conference in Berlin, MR=Maximising Reach, 22-24 June 2005. Registrations are well on target and there has been a very positive reaction to the Advanced Programme mailed at the end of January. The conference is the high point of the EphMRA year and provides an invaluable opportunity to keep in touch with where our industry is going. The EphMRA conference is renowned for providing a programme of distinguished calibre speakers delivering papers of high quality.

This conference is not just about listening to high-level speakers from across the industry; it's about interacting with them.

As well as networking opportunities there are topical papers, interactive sessions, where you will have the opportunity to question the experts. All this coupled with the well-regarded agency fair makes the conference the most important event in the Pharmaceutical Marketing Research Calendar.

The EphMRA agency fair is a unique platform for agencies to reach their audience and demonstrate their contribution to pharmaceutical marketing research.

The popular PRM&T pre-conference interactive workshop topics this year are Gaining Understanding & Insight with Conjoint and an Advanced Leading Edge Research Masterclass - Beyond the Norm - Qualitative Research, which addresses and tackles key issues and implications for Marketing Research and Business Intelligence. These workshops take place on Tuesday 21 June.

The conference theme centers on Maximising the Reach of Pharmaceutical Market Research with regards to breaking down the barriers for Market Research involvement and achieving a true holistic approach for Market Research professionals.

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

Being a 'Berliner' myself I am looking forward to welcoming you to my 'home' town – the setting for our conference.

**Barbara Ifflaender**

EphMRA President 2004 – 05

Altana Pharma

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# Industry must listen

## and respond to the key stakeholders

2004 was one of the most difficult years for the Global Pharmaceutical Industry, culminating in a series of accusations and acrimony unparalleled over the past decade. These debates have predominantly focused around some of the tactics utilized when trying to secure market access for pharmaceutical products across the G8 Industrialized markets.

In the 1980's and 90's regulators used to be the main gateway for products to gain access into the marketplace. There are now emerging increased significant "barriers to entry" from both the supply and demand side. A plethora of demand-side controls are particularly apparent in the UK, and many of these are now under evaluation in other European countries such as Germany and Italy. Some companies have even gone so far as to take legal action against Governments to preserve the ability to market their products effectively.

One needs to ask why has this come about and what can be done to ensure that affordable innovative medicines continue to be made available to patients and the public; whilst at the same time ensuring a profitable future for the pharmaceutical industry.

The stakeholder mix has become increasingly complex. Government wants to ensure it obtains value for money and at the same time wishes to attract a viable R & D pharmaceutical industry contributing to its GDP. If regulatory bodies make requirements too restrictive then the industry will ultimately charge higher prices. Patients and carers want safe and affordable medicines. So how do payers and their advisers balance the needs of government against the increasing demands of an ageing, informed population who want earlier access to innovative medicines, particularly ones that offer the promise of halting or even reversing chronic disease processes?

The disease modifying drugs, such as the monoclonal antibodies (MAB) have recently faced severe restrictions across the EU, but in the US the diffusion picture has been very different, with patients gaining earlier access for conditions such as cancer of the colon and severe sepsis which would have otherwise been untreatable. Within the cancer therapy area there has however, been a variation in uptake, with different patterns of uptake for Oxaplatin, Bevacizumab and Cituximab.

With access to Healthcare now being a global issue, countries will want to offer some degree of harmonisation and equity of access, and there is no question that many Governments are now looking at Health Technology Appraisal processes and the robustness of one in particular, the National Institute of Clinical Excellence (NICE), as offering a possible de-facto standard which could be used to inform their healthcare decision-making process.

What will the future hold for new and more effective, but more expensive technologies, against a backdrop of scarce healthcare resources and rising patient and carer expectations?

It is clear that there will be continuous healthcare reform, and that for most governments access to medicines will be achieved through a number of approaches, including central direction e.g. Germany, with equity, quality, efficiency, and affordability as their goals.

The UK has recently gone through one of the biggest healthcare reforms with the introduction of a new GP contract. Many countries are now looking at the Quality Outcomes Framework on which the GP contract is based to see how it could be adapted to other healthcare systems. Prospective payment systems, reforms to Medicare, changes to reimbursement criteria across the US and Europe are all set to challenge the pharmaceutical industry. Can it respond to the challenge and continue to grow in an environment which has become increasingly hostile and demanding?

The gauntlet has been thrown down to the industry and the landscape is already changing, Japan's Pharmaceuticals Council has recommended that the country's Ministry of Health, Labour and Welfare approves CRESTOR for the treatment of hypercholesterolaemia, with a dose range from 2.5 milligrams, but is contingent on the final agreement of a post-marketing surveillance programme.

In the US, a University Centre for Drug Policy has scanned the horizon for emerging drug therapies and has targeted technologies that are likely to have a significant cost impact. It behoves the manufacturers of these technologies to have answers to the questions which will now rain in on them from all quarters. Listening to payers, prescribers, patients and carers, the multidisciplinary stakeholder network, and providing clear guidance pre, peri and post launch is the key to avoiding the pitfalls.

Specialist healthcare research consultancies can play a vital role in helping senior management define and understand stakeholder needs. They have the ability to undertake market research amongst all the key stakeholder groups, meaning that pharmaceutical companies can gain a much clearer picture of the international landscape from all perspectives. This type of consultancy, gained by listening to all the key stakeholder groups - payor, prescriber, patients and carers, will become increasingly important in an industry where the landscape is continually changing and where the rules never stay the same.

**Mike Mallinson and Stephen Grundy**  
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## Entry Level vs Senior Level Recruitment

An individual joining at entry level needs to gain basic capabilities to enable them to work as a Market Research Executive. Learning is best conducted using more “formal” courses which cover core skills across quantitative and qualitative research.

For senior learning there are fewer set skills programmes and mentoring plays a much larger part. Learning is imparted more from experience on-the-job and working with Project Directors. The ‘Entry Level’ and ‘Senior Level’ scenarios just provide ‘starting point’ frameworks - in reality, learning must be tailored to the needs of individuals. Many of these needs will arise out of day-to-day experiences working on projects and with other colleagues (peer groups, managers, mentors) and others will develop from performance appraisal (formal or otherwise).

## Formal Recognition of Learning

Learning is best facilitated through a personalised Accreditation Programme, supported by experienced trainers delivering courses inside the company and externally. By having individuals with a solid understanding of the building blocks of their particular role, the company will benefit from:

- reduced time dealing with mistakes through inexperience
- improved efficiency
- improved staff motivation by officially recognising the skill sets of individuals.

By gaining accreditation, the individual will benefit by being:

- officially recognised within the company as suitably qualified to mentor others
- having structured skills development
- able to contribute to their continuous personal development.

An Accreditation Programme should specify who participates in each module; recommend a time frame (e.g. within 3 months of joining); and define content and objectives at different levels (Level 1 – Understanding the principles; Level 2 – Applying principles with competence; Level 3 – Advanced).

EphMRA is at the forefront in offering training through its Primary Research Methods and Training Workshops. BHBIA (UK) and PBIRG (US) also offer Pharma MR training and The Market Research Society provides an externally recognised industry qualifications, e.g. the Advanced Certificate in Market and Social Research Practice.

## Secondments

Encouraging individuals to take up secondments with pharmaceutical companies is a useful way of broadening skill sets, and understanding the MR world from the client interface.

Pharmaceutical clients are often keen to cover for maternity leave and time pressured periods. Secondments can also be facilitated within an organisation but across different divisions, which might offer a different geographical / cultural / linguistic focus (e.g. US, UK, Belgium offices) or a different business mix (e.g. Global vs domestic MR).

## Staying in Touch through Networking

Workshops and networking events are an ideal way of keeping up-to-date with current skills and current ‘hot’ topics in the industry. Pharma MR conferences (such as EphMRA, BHBIA, and PBIRG) are a clear priority, but it is also useful to be aware of developments beyond healthcare (such as ESOMAR and MRS meetings).

## Graduate Recruitment

A number of companies now have developed a graduate recruitment programme to provide a strong skills based organisation as they recognise that recruitment of the person with 3-5 years experienced has just proved very difficult. Programmes start with graduate intake streams in September and then they may move out into different departments for a wider experience. At Adelphi we have estimated that the cost for training each graduate is now £60,000 over two years.

## Keeping the Skills Set Shape Balanced and Up to Date

The pool of new graduate talent sits with an experienced group of researchers and is constantly reviewed to keep the skills base balanced, as the philosophy is to aim to build on people's strengths and allow development in areas where personal interests are strongest. An audit of skills assesses whether the companies skills based is correct, and helps drive future recruitment and learning programmes.

## Where and Why do All the Market Researchers Go?

And finally, even though agencies are investing in training, what's interesting is that people don't stay in Healthcare Market Research. How many people do you know that have been in the area for more than 10 years? Even clientside, people seem to move to other disciplines to become customers rather than providers of MR. This constant filling pipeline seems to our challenge for the future.

**Angelina Dolan**

Adelphi International Research

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# Partial coverage of clinical intelligence is a source of oversights and surprises – but what is the payoff of more complete surveillance?

Access to all relevant and available clinical information in an accurate format is essential. For pharmaceutical marketers and market researchers, the information serves as the platform for brand differentiation, competitive intelligence, communications, education, and market and product evaluations.

However, gathering (and analysing) all of the clinical intelligence necessary poses a challenge to pharmaceutical executives due to the limitations inherent in the predominant but selective sources of clinical intelligence used by the pharmaceutical industry:

**Published literature**, in peer-reviewed journals such as the New England Journal of Medicine and the Journal of the American Medical Association, is considered the gold standard source for current and relevant clinical data. While the literature provides valuable information, journals are highly selective; it is impossible to include the findings of all of the clinical research conducted around the world. To complicate matters, results are often published long after the data were presented at a professional conference. A 2003 article in the Journal of the American Medical Association, "Factors Associated With Failure to Publish Large Randomized Clinical Trials Presented at an Oncology Meeting," (Krzyzanowska et al. JAMA, 2003;290[4]:495) describes the extent of the problem of getting timely access to new medical findings. According to the authors, results of a large number of Phase III clinical trials still remain unpublished five years after their initial presentation. Simply put, medical literature is neither comprehensive nor current enough to be the only source of clinical information.

**Major medical meetings**, which distribute current results in the form of poster presentations, abstracts, and symposia, serve as an obvious alternative source for clinical intelligence. While this data must also be editorially reviewed in advance, its reporting time is much shorter. However, there are other factors to take into consideration. For those who present data at these meetings, the meetings are a natural setting to gain recognition and advance their careers as publication is an important job requirement. Unsurprisingly then, the majority of the findings presented focus on favourable clinical and medial data.

**What happens to the less favourable data?** The studies are either shelved or the data is presented at remote meetings with limited exposure. For resource limitation reasons, these are exactly the kind of meetings that do not get selected for tracking and intelligence gathering: their existence is under exposed, hence their importance is underestimated. Yet, these are the meetings that are most likely to deliver 'surprises' which will affect the commercial outlook for pharmaceutical brands.

## What is the business payoff?

Access to clinical information from medical meetings (all sizes, worldwide, covering a broad range of medical specialties and therapeutic areas), supplemented and benchmarked with peer reviewed published literature, benefits business in a diverse number of ways:

- Uncover competitive strategies in the making instead of after the fact
- Identify unmet medical needs, new treatment trends and clinical opportunities
- Track and benchmark the most active key opinion leaders and which drugs they advocate
- Profile how in-house and competing products are viewed and used - and build more accurate SWOT analyses

To explore just one example of the business payoff in more detail, consider the following:

## Objective

A pharmaceutical company had a Phase II vasopeptidase inhibitor (angiotensin-converting enzyme/neutral endopeptidase) in the pipeline, but did not have very strong in-house cardiovascular expertise. This made it mission-critical for the company to gain an objective background overview of this clinical landscape. Eight competitors had been identified already - any or all of them could possibly launch a new competitive entrant in this drug class. While a significant amount of information was being presented and published for omapatrilat (Vanlev), one of the competitor drugs, angioedema problems had been demonstrated in the side effect profile of this particular drug.

## Application of meeting based clinical intelligence, benchmarked with published information

A clinical intelligence expert team reviewed relevant medical meeting data and benchmarked it against published literature, and this extensive analysis identified a total of 32 potential competitors conducting clinical trials - not just eight. Further research revealed that data relating to these competitors already had been presented at 15 different worldwide medical meetings, and published in 12 different journals. The clinical intelligence expert team conducted an additional in-depth analysis of all data and determined that the changes in the amount of inhibition on angiotensin-converting enzyme or neutral endopeptidase failed to improve the side effect profile. In conclusion, the company gained a complete, critical look at the clinical landscape, allowing them to justify a significant change in their course of action.



## Payoff

After reviewing the retrospective data analysis of the clinical landscape and incorporating the findings with their internal data, the company called a stop to further trials for their phase II vasopeptidase inhibitor. This decision saved the company millions of dollars in trial work and related costs for a drug that would not be likely to receive approval from the Food and Drug Administration.

## In closing

Timely access to, and insightful analysis of accurate clinical intelligence is a key factor driving decision-making in today's pharmaceutical industry. However, many current strategies inadvertently overlook important clinical data released at clinical and medical meetings outside a limited number of high-exposure events. If data from these other meeting sources is overlooked, it becomes very difficult to generate a full and objective picture of clinical activity to accurately support decision-making.

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## Facts & Figures

about the Newsletter publication

Copy/Advertising Deadline: April 25th 2005.  
The next EphMRA News will be issued in June 2005.

Advertising rates and details are as follows:

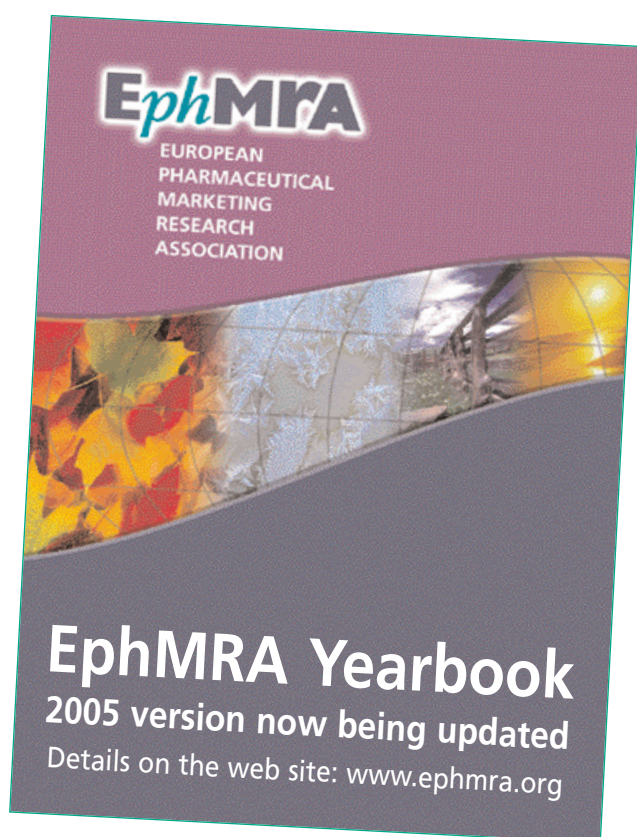
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Four Colour	N/A	750 CHF	1200 CHF

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# Conference Round-Up

MR=Maximising Reach

Conference at a glance



## WEDNESDAY 22 JUNE

1230 - 1400

Delegate Lunch - sponsored by EphMRA - open to all delegates.

**EphMRA Pharmaceutical Conference**  
MR = Maximising Reach



1400 - 1415

Introduction - Barbara Ifflaender - EphMRA President - Altana Pharma - Germany.

### Session One: Reaching Out .....To where?

**Chairman: Barbara Ifflaender - Altana Pharma - Germany.**

1415 - 1425

**Chairman's Introduction.**

1425 - 1505

*How to Implement Market Research into the Strategic Business Process - Thomas Hein - Schering AG - Germany and Lisa Heideman - SKIM Analytical Healthcare - The Netherlands - Market Research itself does not and cannot add value unless implementation is optimal. This presentation looks at how industry and market research agencies have to work together to facilitate implementation and what each partner should expect of the other.*

1505 - 1535

*Marketing Research as an Integrative Function - Kurt Kessler - ZS Associates - USA - Presentation of a real consumer case study that highlights many of the best practices in action as we exhort ourselves as pharmaceutical marketing researchers to 'add value'. Outcomes from the case studies are instructive to the 'traditional' pharma area.*

1535 - 1600

**Delegate Coffee - Sponsored by Ziment**

1600 - 1710

*Reaching Out...And it Helps When Our Hands Meet in the Middle - Markus Koester - Merck KGaA - Germany and Stephen Godwin - Synovate Healthcare - UK - A provocative look at the future for the Pharmaceutical Marketing Research Function from viewpoints of Pharmaceutical Company, Agency, Younger and Older.*

1710 - 1720

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

1845

**EphMRA Evening sponsored by EphMRA - Dress Smart/Formal.**

# THURSDAY 23 JUNE

0700 - 0845	<b>Delegate Breakfast - Sponsored by EphMRA.</b>
<b>Agency Fair</b>	
1000 - 1130	<i>Agency Fair - open only to all Pharmaceutical Company registered delegates and registered Agency conference delegates whose company has registered and paid to exhibit at the agency fair.</i>
1000 - 1030	<b>Agency Fair Coffee</b> - open only to all Pharmaceutical Company registered conference delegates and registered Agency conference delegates whose company has registered and paid to exhibit at the agency fair.
1130 - 1330	<b>Agency Fair - open to all registered delegates without restrictions.</b>
1200 - 1330	<b>Agency Fair Delegate Buffet Lunch - co-sponsored by EphMRA, Aequus Research and NOP World Health</b> - Open to all registered delegates without restrictions.
<b>Session Two: Projects that Maximise Reach</b>	
	<b>Chairman: François Feig - Merck KGaA - Germany.</b>
1430 - 1435	<b>Chairman's Introduction</b>
1435 - 1505	<i>Consumer Insights for Clinical and Marketing - Uwe Hohgräwe - Johnson &amp; Johnson - USA and Bärbel Matiaske - GfK HealthCare - Germany - How to collaborate with Marketing, Health Economics and Clinical Research to provide significant analysis to support the drug development process as well as marketing strategy. How Rx products can be positioned in the competitive environment of OTC products and which consumer techniques can be harnessed to add value. How a market research agency aids this collaboration in an innovative way.</i>
1505 - 1540	<i>The Sheep in Wolves Clothing - Kai Bruns - Lilly GmbH - Germany and Dieter Korczak - GP Forschungsgruppe - Germany - How marketing research results can leverage health outcomes discussions. A case study of how market research can help argumentation against further cost reductions by health political measures by demonstrating a strong need for a substance group which prevented hospital stays and other direct care costs.</i>
1540 - 1610	<b>Coffee for all delegates - Sponsored by EphMRA.</b>
<b>Session Three: Maximising Information Collection and Use</b>	
	<b>Chairman: Marianne Schiller - Schering AG - Germany.</b>
1610 - 1615	<b>Chairman's Introduction.</b>
1615 - 1645	<i>Modelling Advice-Seeking Behaviour of Pharmacy Customers - Thomas Kopf - Beiersdorf - Germany and Bernhard Treiber - Treiber + Partners - Germany - This presentation will bring together two emerging fields of innovative research activity. Firstly intelligent agency technology, to allow researchers to model the advice-seeking and information gathering behaviour of consumers in so-called Tutor, Mentor and Advisor Systems. Secondly the field of virtual-reality applications in marketing research, to study how consumers seek and utilise critical information for relevant purchase decisions.</i>
1645 - 1715	<i>Quantifying the 'Halo Effect' for Alternative Registration Strategies for a New Cardiovascular Drug - Mark King - Back Bay Strategies - USA - How marketing research identified a patient cohort which maximised the halo effect across all other cohorts, while saving a year in development and \$80 million in development costs.</i>
1830	<b>ims Health Gala evening - Sponsored by ims Health - Dress Smart Casual.</b>



# FRIDAY 24 JUNE

0700 - 0845

**Delegate Breakfast - Sponsored by EphMRA**

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

0900 - 0915

**Chairman: John Branston - P\I\L Research Europe - UK.**

0915 - 0950

**Chairman's Introduction**

*Insights from an Outside Perspective - Olaf Schäfer - Accenture GmbH - Germany - Does market research need to rethink the scope of its activities? Olaf will offer several hypotheses for MR in the future, with associated advantages and disadvantages.*

0950 - 1025

*Maximising Information Collection and Use - Bob Douglas - Synovate Healthcare - UK - How should market researchers adopt new ways of working and new skills to provide the insights required to address the increasing complex Pharmaceutical business. How do we ensure that our skills increase to measure the increased complexity?*

1025 - 1045

**Delegate Coffee - Sponsored by EphMRA.**

1045 - 1215

**The Debate - This house believes that market research should maximise its reach to be involved in boardroom decisions - Moderated by Nigel Burrows - Pitre - Italy.**

**For the Motion - Lead by Michael Owen - Context Research - UK and Linda Grosjean - F. Hoffman-La Roche - Switzerland.**

**Against the Motion - Lead by Sandra McAuliffe - Novartis Pharma - Switzerland and Gary Johnson - Inpharmation Ltd - UK**

1215 - 1235

*Closing remarks Barbara Ifflaender - EphMRA President.*

1235 - 1245

*Presentation of the Jack Hayhurst Award for Best Paper.*

1245 - 1400

**Delegate Lunch - Sponsored by EphMRA.**

## THANKS TO THE CONFERENCE SPONSORS

If you would like to sponsor the conference and would like to discuss ways in which your company's exposure can be enhanced there are still some exciting promotional opportunities on offer -

**Call Janet Henson +33 4 78 05 71 50 or Bernadette Rogers on +44 161 304 8262.**



**Sole Sponsor**  
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EphMRA Evening  
Wednesday 22 June  
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Thursday 23 June



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# The New EphMRA Web Site is Working Well

[www.ephmra.org](http://www.ephmra.org)

With the new site being 'live' since October 2004, we hope you have had the opportunity to visit and find your way around. The site has been completely restructured and redesigned and is now based on a Content Management System called Immediacy. The new web site managers and designers are Unified Solutions based in Slough.

A brief overview of where you can find things on the new site is as follows – the main headings in bold are those you see on the site:

## **About us**

Executive Committee  
Questions and Answers  
Contribution Award

## **Join EphMRA**

Join EphMRA - Full Member  
Join EphMRA - Associate Member  
Members List - Full and Associate Members  
Statutes

## **Recruitment**

check out Vacancies posted there

## **Publications**

EphMRA Pharmaceutical Marketing Research Code of Conduct  
EphMRA-PBIRG Internet Research Guidelines  
Lexicon  
EphMRA Newsletters  
EphMRA Yearbook 2004

## **Annual Conferences**

register for the 2005 Conference

## **EphMRA Committees**

The Executive Committee  
Anatomical Classification and Standardisation Committee  
Medical Data Committee  
Database and Systems Committee  
New Form Codes Committee  
Primary Research, Methods and Training Committee  
Sales Data Committee  
Strategic Business Analysis Committee

## **Training Workshops**

Research Toolbox  
Segmentation Training Course  
Previous Course Reviews



## **Anatomical Classification**

Who we are  
Anatomical Classifications Guidelines Index  
Committee

## **NFC Classification**

Rules  
New Form Codes Committee  
Form Codes  
NFC Poster 2004

## **Foundation**

The Board - Who we are  
Foundation Projects Previously Funded  
Verification of the Internet project  
Assessing the Cultural Impact  
Perception and Reality  
Guidelines for the Foundation

## **Members Forums**

Password activated

On the home page there is now a What's New section where we can post up items of immediate interest – eg conference registration, Yearbook 2005 details etc.

EphMRA is always open to other suggestions for web site services and developments so please contact me as appropriate.

**Bernadette Rogers**  
General Secretary  
MrsBRogers@aol.com

EphMRA is the Association which brings together European, research-based pharmaceutical companies operating on a global perspective. EphMRA is the dedicated forum for strategic business intelligence and marketing research professionals.

"Our primary objective is to provide the opportunity for members to add value to their international marketing research and business intelligence activities by improving their skills and knowledge."

Our mission, aims and objectives are shared by our sister organisation in the USA, the PBIRG, in order to ensure mutual benefits to all international healthcare companies.

EphMRA assists its members to:

Improve strategic decision making

# UPDATE ON PRM&T Activities

Janet Henson – janet.henson@wanadoo.fr

**HELP  
WANTED**

## VACANCY

We currently have a vacancy for an EphMRA Full member to join the committee – if you are interested please contact Janet Henson.

**What courses do we offer?  
What future courses are planned?  
Who should attend?**

**LOOK NO FURTHER -  
www.ephmra.org**

A new review of all the PRM&T training courses is now live on the EphMRA website. A new feature of the website is a full listing of all our courses, their objectives and learning outcomes. Planned dates for all courses and workshops are also featured. If you have any feedback on this web based information tool please let us know.



## Lexicon

The update of the Lexicon is now complete and over 100 new terms have been added. The new Lexicon will be distributed to all members in the coming few weeks.



**New benefit to EphMRA Full and Associate Members**

**On all future courses**

**BOOK FOR 3 AND PAY FOR 2.**

*(Terms - for delegates from same company and all booking at same time)*

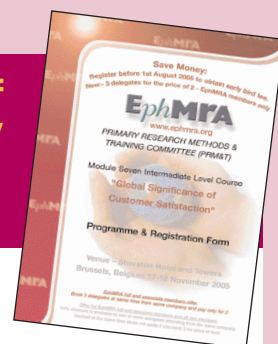


## UP AND COMING COURSE NOTE IN YOUR DIARY

**REGISTRATION MATERIALS  
ON EphMRA WEBSITE**

## "Global Significance of Customer Satisfaction"

**November 17-18  
Brussels, Belgium**



### Workshop Introduction

Customer satisfaction is considered a critical driver for success by many organizations...

- 60% of all businesses cite 'customer retention' as a critically important measure. [Economist]
- Studies show a 5% increase in customer retention can trigger a 25%-to-125% increase in profitability [HBR]
- Some 45% of Global 2500 corporations already have a VP responsible for the overall customer experience
- Wall Street analysts look to customer satisfaction rates as a leading indicator of a company's financial health & profitability
- Companies like PTC and Siebel are already publicly reporting some of this data in annual reports, quarterly earnings press releases and ads

...but is it relevant to pharma?

More and more pharmaceutical companies are looking at customer satisfaction initiatives but not necessarily under the guise of 'customer satisfaction'.

### Some facts and figures

Research shows that: 65% - 85% of customers, who switch to competitors, report that they were either 'satisfied' or 'very satisfied' [TARP]

Reasons customers leave:

- 3% move away
- 5% develop other supplier relationships
- 10% leave for competitive reasons
- 14% dissatisfied with product
- 68% perceive an attitude of indifference by supplier [TARP]

Losing customers is expensive: Bain and Co report that it costs 5 times as much to attract a new customer as to keep an existing one, and it costs 16 times as much to grow a new customer to the same level of profitability.

## This course investigates:

- What do we mean by customer satisfaction and is satisfaction enough – what is loyalty?
- The many different 'customers' in our pharmaceutical industry
- The different measures of satisfaction – brand, company, service, representative
- Some of research techniques used to understand and measure each
- The local tactical and international strategic use of customer satisfaction
- How satisfaction (and loyalty) drives growth
- The role of satisfaction in Customer Relationship Management (CRM)
- Some thoughts on the future of customer satisfaction in healthcare

## Workshop Objectives

The aim will be to give delegates a thorough grounding in Customer Satisfaction together with what is involved in researching and measuring it within the unique environment of the healthcare industry. We will consider who are our customers and the different measures of satisfaction. Delegates will have the opportunity to work with experts in customer satisfaction and to understand the growing demand for customer satisfaction research in the future.

Delegates will leave the workshop with a better understanding of:

- what is customer satisfaction
- who are our customers
- why satisfaction is important
- why satisfaction will become more important to our industry
- how to measure satisfaction
- what research techniques can be used and when to use them

## Who should attend?

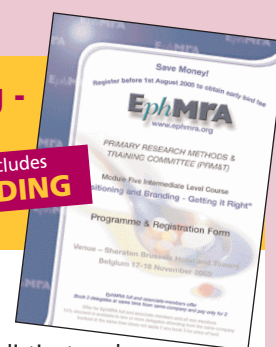
The course is aimed at experienced Market Researchers, Business Analysts and Marketing personnel from companies and agencies. Anyone can attend, but EphMRA Full and Associate members have priority for places.

## "Positioning & Branding - Getting it Right"

**November 17-18**

**Brussels, Belgium**

Now includes  
**BRANDING**



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

**Positioning Statement** written declaration by a company regarding its view of where its product or service sits in the marketplace – EphMRA Lexicon

**Branding** creation of brand image through visual and verbal elements. Includes, but goes far beyond, 'brand name' and 'logo' alone. – EphMRA Lexicon



**Brand Image** perceived impressions of a brand, frequently related to abstract associations. May be the result of contrived marketing action or an accident of market perception. – EphMRA Lexicon

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

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

## Workshop Objectives

The key objectives of this workshop are:

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

## Who should attend?

The workshop is aimed at experienced market researchers from pharmaceutical companies or agencies. Anyone can attend but EphMRA Full and Associate members have priority for places.



# June 2005 - Conference One-Day Workshops

REGISTER ON-LINE NOW - SEE CONFERENCE DETAILS

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

## EphMRA PRM&T Training Workshop

Tuesday 21 June 2005 0900 - 1700

### 'Gaining Understanding & Insight with Conjoint and Discrete Choice Models'

#### Workshop Convenors

This interactive workshop is being organised by the EphMRA Primary Research Methods and Training (PRM&T) Committee, and will be convened by Stephen Grundy – GfK Martin Hamblin Global HealthCare, Kurt Ebert – F. Hoffman-La Roche and Alexander Rummel – Psyma International Medical Marketing Research.

#### Workshop Background

In the increasingly complex range of market situations that companies have to assess, it is necessary to provide market research approaches that can help management to have better insights on many challenging questions.

These can include: -

- i) What product features a product must possess in the future for it to succeed.
- ii) What modifications to the product's profile will affect the chances of success positively/negatively?
- iii) How potential newcomers will influence existing and other new market entries.

Conjoint and Discrete Choice Models studies are able to assist with these difficult questions.

#### Workshop Objectives

This workshop will provide delegates with practical guidance on the breadth and depth of marketing research techniques covering conjoint and discrete choice model approaches that will enable everyone to make better-informed decisions in these challenging circumstances. On returning to their companies delegates will be able to more effectively and appropriately advise their internal and external customers.

#### Who can and should register for the Workshop?

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

0900 - 0930	Welcome and Workshop Objectives - Convenors
0930 - 1015	Defining the Role for Conjoint and Discrete Choice Models – Stephen Grundy – GfK Martin Hamblin Global HealthCare
1015 - 1030	Coffee
1030 - 1130	What are Conjoint and Discrete Choice Models? Roger Brice – Adelphi – UK
1130 - 1215	What does it all mean and how to apply and Utilise Conjoint and Discrete Choice Model Results – Early lifecycle – Ralf Maser – Psyma International Medical Marketing Research
1215 - 1315	Lunch
1315 - 1400	What does it all mean and how to apply and Utilise Conjoint and Discrete Model Results – Mid lifecycle onwards – Dirk Huisman – SKIM Analytical Healthcare – The Netherlands
1400 - 1430	When, Where and Pitfalls – David Hanlon – TNS Healthcare – UK
1430 - 1500	Questionnaire Design – Do's and Don't's – Roger Brice – Adelphi – UK
1500 - 1600	Syndicate Case Study – Moderated by Convenors
1600 - 1645	Syndicate Presentations and Panel Feedback
1645 - 1700	Summary and Conclusions – Close of Workshop



## EphMRA PRM&T Masterclass - Leading Edge Research

Tuesday 21 June 2005 0930 - 1700

## 'Beyond the Norm - Advanced Qualitative Techniques

### Workshop Leader and Workshop Convenors

The course leader for this interactive master class is Rachel Lawes. Lawes is a semiotician, social psychologist and a specialist in human communications. A former university lecturer, she worked with the internationally renowned Discourse and Rhetoric Group of Loughborough University. Her company, Lawes Consulting, exists to bring cutting-edge research techniques to the marketing community.

Lawes is known for her lively, clear and usable explanations of difficult techniques. She is a regular conference speaker, the recipient of several Market Research Society (MRS) awards, and leads courses for the MRS in the UK.

The course is being organised by the EphMRA Primary Research Methods and Training (PRM&T) Committee, and will be convened by Xander Raymakers of NV Organon and Peter Winters of Medefield Europe.

### Workshop Background

Intuitively, researchers know that it is important to keep research methods fresh and interesting, but it is also good to have some practical techniques and examples at hand to help justify bringing new thinking into everyday practice. In this workshop we introduce some techniques from within (i) semiotics and (ii) discourse analysis.

### Workshop Objectives

To help delegates raise awareness of the benefits of adopting some of the newer qualitative techniques available for MR.

### Learning Outcomes

By the end of the session, delegates will be able to:

- Justify the adoption of new approaches in qualitative research by describing their benefits with reference to specific techniques, based on the delegate's practical experience on the day.
- Apply the techniques they learned on the day to raw qualitative data on future projects.

### Who can and should register for the Workshop?

The target audience for this advanced course is experienced market researchers who want to be better able to provide insight into ways to justify new approaches within their companies.

### Draft Programme

0930 - 1000	Welcome and Workshop Objectives
1000 - 1100	Session 1: Introduction – Real-World Market Research
1100 - 1115	Recess
1115 - 1245	Session 2: Methods & Techniques – Semiotics, Discourse Analysis
1245 - 1330	Lunch
1330 - 1530	Session 3: Techniques In Action – Practical Data Analysis
1530 - 1545	Recess
1545 - 1645	Session 4: Discussion – Outcomes & Applications
1645 - 1700	Summary and Conclusions – Close of Workshop

## FUTURE COURSES IN THE PLANNING STAGE - SEE NEXT EDITION FOR UPDATE OR CONTACT JANET HENSON

janet.henson@wanadoo.fr

### Introduction to Pharmaceutical Marketing Research

31 January – 2 February 2006

### Understanding and Using Desk Research: 1 – 2 February 2006

### Work Ongoing

The two PRM&T publications – **Research Through the Product Lifecycle** and **How to Run a Research Project** are currently being updated. If you have any comments on these publications which would help our updating please let us know.

# Report from The Research Toolbox Course

October 2004



Convenors: Dorothy Parker and Bob Douglas

12 delegates representing both clients and agencies participated in the Research Toolbox course in Brussels during October. The course was designed as an intermediate course for research practitioners who wished to develop their skills beyond a basic understanding. The course focused on a variety of research techniques and applications required by the professional market researcher. Delegates gained a better understanding of:

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

Some of the key issues which ran throughout the course were:

- Agreeing objectives and action points up front and using these as reference at during the design, analysis and reporting
- Good communication is essential in almost everything we do. This covers the agency and client relationship, briefing, interviewing skills, linguistic differences, understanding culture and presenting research findings
- Process is important in research, both quantitative and qualitative, in order to deliver a quality service
- Keep it simple! Don't over complicate research.

## Course Convenors

Representatives convened the course from the EphMRA Primary Research Methods and Training (PRM&T) Committee, Dorothy Parker from Fast Forward and Bob Douglas from Synovate Healthcare (picture top right).

## Feedback from a delegate...

*'What did we learn during the recent EphMRA training course "The Research Toolbox"? In what determines the success of a market research project, one major take home message was definitively that it's a lot about knowing the full market research instrumentation, but also at least as much about having communicative skills and standards defined. Consequently, the course did not focus solely on the presentation of the market research instruments that are available throughout the life cycle of a pharmaceutical product, but put special emphasis on the fact that it is communication that ultimately will determine the qualitative outcome of any market research activity. Only in a true partnership between agency and pharmaceutical company will market research activities be optimally resolved. This will be achieved for the benefit of both partners. From the implementation of distinct communication standards eventually further stakeholders on both sides will profit. In addition what really made this course worthwhile was the great opportunity to meet other market researchers from all over the world, which were more or less at the same stage of their professional careers. We enjoyed a friendly and open atmosphere and*

*could make many interesting contacts that might turn out useful at many occasions during future market research projects. In summary: A good workshop with excellent and well-prepared speakers, well organised by the PRM&T committee.'*

The course was highly interactive with case study sessions. Many thanks to all the speakers who contributed to the success of the course:

**Cathy Clerinx** ..... Adelphi International Research  
**Bob Douglas** ..... Synovate Healthcare  
**Vasoulla Georgiou** ..... Adelphi International Research  
**Steve Grundy** ..... GfK Martin Hamblin Global HealthCare  
**Brian Lefevbre** ..... ZS Associates  
**Sandra McAuliffe** ..... Novartis Pharma  
**Dorothy Parker** ..... Fast Forward Research  
**Howard Parr** ..... Holden Pearmain Research  
**Lorna Walters** ..... Research International

## Bob Douglas

Synovate Healthcare

Delegates on The Research Toolbox course were:



Cecile Ecoffet - UCB



Bes Perrine - Sanofi-Synthelabo Groupe



Nida Afonso - Boehringer-Ingelheim



Joao Casaca - Boehringer-Ingelheim



Carel Fransen - NV Organon



Penelope Neely - Adelphi International Research



Guy Pascoe - Synovate Healthcare



Gemma Ramdhun - GfK Martin Hamblin HealthCare



James Slane - Allergan Ltd



Valerie Gauthier - GfK Martin Hamblin Global HealthCare



Jacob Maso - GfK Martin Hamblin Global HealthCare

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France, USA, United States,  
Brazil, Russia, Republic of  
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## WHEN GLOBAL EXPERTISE MATTERS IN MARKETING RESEARCH

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## Diary...

**May 7-11, 2005 | Boston Seaport Hotel & World Trade Center | Patients, Professionals, Payors, Privacy: The Changing World of Research**



As the pharmaceutical industry continues to face significant challenges and remains in the spotlight of current events, it becomes more critical for Market Researchers to keep informed of industry events. The PBIRG 2005 Annual General Meeting program has been designed to provide a look ahead at economic, societal, political and technological forces which will change healthcare systems in the developed world over the next decade and their implications for the pharmaceutical and biotech industries.

**Program Features:** General Sessions, Poster Showcase: *Members Sharing Business Excellence, New!* PBIRG University Series Lecture Modules, Agency Fair, Pre-Conference Education Series, Research Excellence Series, Formal and Informal Networking Opportunities.

**September 19-20, 2005 | Education Workshop Series and Industry Networking Event November 15, 2005 | Industry Networking Event | Satellite Location TBA**

## Chair of EphMRA New Form Codes Committee - Applications invited.

**EphMRA** is seeking to appoint a Chair of the NFC Committee. The work involved is approx 5-6 days per year:

- Reviewing and Approving Form 10s
- A face to face NFC Committee meeting at the AGM
- Meeting with Executive Committee and making the AGM Presentation
- Review of meeting minutes, preparation of reports, presentations to AGM and replying to NFC enquiries.

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

**Contact EphMRA General Secretary**  
**MrsBRogers@aol.com**



## EphMRA MEMBERS PACK

The Members Pack was mailed out by January to Full and Associate members - please contact Bernadette Rogers if yours did not arrive. One pack per company was issued plus one to each Committee member.

This is a blue magazine type holder designed to keep your EphMRA publications in one place and for ease of reference.



# We think you should see a specialist...

## ICM Healthcare



You want an innovative approach to your healthcare research. The next decision is critical and demands clear thinking and real insight to complex issues.

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### ICM Healthcare

Contact: Heather Pollitt  
on +44 (0) 20 7462 1754  
or at [heather.pollitt@icmresearch.co.uk](mailto:heather.pollitt@icmresearch.co.uk)

**ICM**

Beyond the facts, there's ICM Healthcare



# New People/ Promotions



GfK Martin Hamblin

GfK Martin Hamblin has announced the promotion of Martine Leroy-Sharman to General Manager of the UK-based Global HealthCare office, taking full responsibility for the management of the business and team. Stephen Grundy, Group General Manager, will now move into directing his full attention to building GfK Martin Hamblin's Healthcare business at an international level, developing and managing the company's strategic health-care accounts.

Saeed Mumtaz, who has joined as Divisional Director from Novartis Pharmaceuticals and is a Spanish bilingual multinational having lived in the UK, Spain and Switzerland. He recently worked for Novartis and Roche HQ's covering market research, analysis and forecasting.

Mike Mallinson joined the company at Christmas to establish a payer, pricing, reimbursement and market access practice within the Global HealthCare division.



Pamela Ford

The Research Partnership announces that Pamela Ford has joined as a Research Executive from A.C. Nielson Emerging Markets in Cyprus, Dr. Anja Visser joins as a Research Manager from SKIM Analytical Healthcare in the Netherlands.



Celia Dacombe

Celia Dacombe joins as Marketing Manager. Celia has over 16 years experience in sales and marketing - initially in the publishing area and latterly with ISIS Research.

**Evaluate Pharma** has appointed Debbie Paul as Senior Vice President, North America. Debbie joins Evaluate from Sandoz, where she was Director of Market Research. Prior to Sandoz, she was with McKinsey in New Jersey.



Harriet Kozak, previously with BMS and NOP has joined Adelphi. Harriet's role as VP will be based with Adelphi International Research US operations. She will be focussing on business development and working to extend Adelphi's profile as provider of Marketing Research globally.



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Quality solutions for your most marketing questions



Ceri Rothwell

Fast Forward Research and 4discussion welcomes the appointment of Ceri Rothwell as research executive. Ceri brings experience in research, training and project coordination from working in John Moore's University and in its Liverpool Excellence Partnership directive.



Synovate Healthcare announces the appointment of Laurie Harris as Vice President, Corporate Development and she has joined from NOP World Health. At Synovate Healthcare, Laurie Harris will focus on corporate development responsibilities involving the senior role for Mahwah custom business.

Synovate Healthcare also announces the appointment of Marianne Purdie as Global Branded Solutions Director and brings considerable healthcare experience.

The TRBI healthcare team, headed up by Dan Wellings, has joined the Synovate offices in Putney, London. They specialise in branding and have been rebranded as Synovate Healthcare's branding and communications research specialist unit.

## ServiceNEWS



All Global Viewing announces the arrival of FocusVision. Providing video streaming from 3 of our 5 studios to ensure fieldwork is delivered to international clients simultaneously. All Global Viewing can take care of all your research needs in an extremely comfortable and stylish environment using leading edge technology. To find out more information visit [www.allglobalviewing.com](http://www.allglobalviewing.com)



EQuesta, the online division of Fieldwork International announces that its panel of loyal European physicians has doubled in size over the past year to 19,000 and is currently growing at a rate of 2000 physicians per month.

Working in partnership with its US partner panel (over 140,000 US Physicians) it now offers a truly international service to clients both sides of the Atlantic.

## CompanyMOVES



Essense, the international marketing research and consultancy group, has moved to new premises. Please contact Jeanette Hodgson, Anna Garofalo & Helen Langdon at:

Lutidine House  
Newark Lane  
Ripley  
Surrey GU23 6BS  
Tel switchboard: +44 (0)1483 270400  
Fax: +44 (0)1483 270401



Fast Forward Research and 4discussion announce they have new premises in Wilmslow, South Manchester.

Crown House  
Manchester Road  
Wilmslow  
Cheshire SK9 1BH  
Tel: 01625 543700  
Fax: 01625 521432



## 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.



# Who wants a glimpse of the future, when you can take a long hard look at it?

These days, knowing the facts about what's happening in your market just isn't enough. You need to know what's going to happen, and, more importantly, what to do about it when it does.

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