

EphMRA NEWS

European Pharmaceutical Market Research Association Issue: March 2008

Dear Colleagues,

The first quarter of a new year is always such a busy time for our members and indeed also for EphMRA!

In January we hope you all found the 2008 Barcelona Conference Programme and Registration pack hitting your desks. From the details it looks like we can expect a well constructed and stimulating event in June and the EphMRA Board is looking forward to welcoming you to Barcelona. For those of you attending the conference for the first time please do join us at 19.00hrs on Tuesday 24 June for an orientation Welcome Cocktail – here you can meet the EphMRA team and network with other first time attendees.



The agency fair will this year take place in the afternoon of Thursday 26th June and we expect a high number of exhibitors. We would like to strongly encourage all pharmaceutical company conference attendees to take appropriate time to attend the fair and network with colleagues.

The IMM (Interim Members Meeting) took place on 6 February 2008 at the Hilton Hotel, Heathrow Airport. It was a very successful day. In parallel there were separate Full member and Associate member meetings during the day. The guest speaker on the day was Steve McDermott, who has been voted 2007 Motivational Speaker of the Year, and his insightful and enthusiastic presentation was entitled 'A Viewpoint on Innovation'.

There were opportunities for networking during coffee and lunch with industry and agency colleagues and it was good to exchange views and discuss ideas.

Turning to the work of EphMRA, the Board continues to praise the work of the Committees – their Chairs and active Members are dedicated teams. As you will see later on in this News we have much to report on concerning PRM&T and Training, Foundation projects and other committee initiatives.

EphMRA has invested significantly in On-Line training programmes in response to member needs. Currently the Introduction to International Pharmaceutical Market Research has just been launched – this was previously a face to face course but now is available on-line. There are also MR skills courses - Introduction to International Pharmaceutical Market Research and The Role of Market Research within the pharmaceutical industry. Business and Leadership Skills courses have also been developed.



Please take the time to look at the courses on our web site at <http://www.ephmralearning.org/>

To keep you up to date, we now have over 120 Associate Members, represented by the Associate Members Board who work in partnership with the EphMRA Board to discuss issues and initiatives of relevance to all members.

Finally the EphMRA Board meet quarterly to address and move forward a wide range of agenda points and many emails are exchanged in between meetings as necessary. Thanks to the Board's commitment across a range of issues we will have much to report on at the June AGM.

We look forward to the next News - issued just before our conference and we will reporting on some highlights of the conference which should not to be missed.

Many thanks

The EphMRA Board

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Visit the EphMRA web site at www.ephmra.org

EphMRA 2008 Newsletters - Copy deadlines

Published	Copy Deadline
Early June	14 April
September – Post Conference News	9 July
December	13 October

Advertising Specifications

	No bleed	With bleed	Type area
Full page	297mm x 210mm	307mm x 220mm	277mm x 190mm
Half page horizontal	148mm x 210mm	158mm x 220mm	128mm x 190mm
Half page vertical	297mm x 105mm	307mm x 115mm	227mm x 185mm
Quarter page	148mm x 105mm	158mm x 115mm	128mm x 185mm
Box Ad	80mm x 60mm	Not Required	70mm x 50mm

Publications trimmed size 297mm x 210mm

Resolution/Artwork	If using photoshop or software dependent on resolution please ensure that it is set at the correct size and that the resolution is set to no less than 300dpi. Finished artwork needs to be supplied in CMYK (unless in Black & White) with embedded fonts, or text should be converted to outlines/paths and supplied as an EPS. Print quality PDF files are also acceptable. PLEASE NOTE: We cannot be held responsible for any misprint, if fonts are not embedded/converted and the file is not in CMYK.
Operating System	Apple Mac
Programmes used	Quark Xpress, Adobe Illustrator, Freehand, Adobe Photoshop
Media	Compact Disc, Memory Sticks and Email are available.
File Formats	Graphics should be supplied (CMYK) in the following formats EPS, TIF, JPEGs and Print Quality PDF files.

Prices in Swiss Francs

Prices displayed are for full colour - EphMRA News is produced in colour therefore mono prices are not available

Box Ad	100 CHF	Quarter page	500 CHF
Half page	750 CHF	Full page	1200 CHF

CHF = Swiss Francs

EphMRA Diary

**EphMRA Training Courses:
15-16 April 2008, Brussels**

Workshop B1: 'Evaluating a Business Opportunity - The Role of Market Research'

Workshop B3: 'How Do I Brand to Win? - The Role of Market Research in Brand Development'

**2008 Conference
A Night at the Movies
25 – 27 June,
Barcelona Spain**



EphMRA Board initiates independent market research survey amongst the Associate Members

The EphMRA Board is pleased to inform all members that it has initiated a 2 phase independent market research study which is being conducted by Behaviour & Attitudes, Ireland.



A first stage qualitative study has already taken place with a number of Associate Members – many thanks if you participated in this. The aim of this study was to get a qualitative feel from a range of members about the membership needs of Associate Members.

The results of this study have been very insightful and the objective feedback very welcomed by the EphMRA Board.

The Board has now decided to action the qualitative results by commissioning a quantitative telephone study amongst a larger sample of Associate Members to quantify and confirm the qualitative results. If you are contacted by Behaviour & Attitudes to participate in this study then we hope you will be able to.

The results from the entire study will enable the Board to tailor the Association's activities to better meet member needs.

Branding:

What you need to tell your Product Manager!

Despite the increase in generic prescribing (now as high as 65% in several countries), the influence of Managed Care (USA) and the restrictions on "complete" prescribing freedom elsewhere, most marketing executives would agree on the importance of "branding" prescription medicines. However, many may not fully appreciate the significance of this or the various aspects that successful branding should encompass.

Although there has been a significant improvement in ethical pharmaceutical branding over the last 6-7 years, (e.g. Nexium; Viagra; Singulair; Fosamax come immediately to mind) the implementation and commitment fall way behind what occurs in consumer marketing.



When attempting to successfully brand a product, the aim should be to enhance the equity or value consumers (or in our case physicians, patients and Payors) associate with the product: But Brand Equity is more than an intrinsic value placed on the product, it encompasses everything that a "consumer" thinks, feels, and knows about a brand.

What Brand Managers in Healthcare should know, is that branding a pharmaceutical product successfully, has an even greater and immediate impact on the bottom line than a successfully branded consumer product! Why?



In many consumer markets (Fast Moving Consumer Goods), individuals may make at most 5-10 purchasing decisions a week for a specific type of product e.g. a beer, a chocolate bar etc; most times it is even less frequent! However, in the prescription medicines market, a physician will often make 40-100 such decisions for a specific type of prescription product per week!

Thus, developing a successful brand that conveys a positive interlocking set of benefits, that have a positive influence on the decision making process and differentiating the brand from competitors, produces immediate and tangible results.

By developing a brand's equity or intrinsic value, one is developing "trust" and confidence in the product. The outcome of this is that when brand equity rises, price sensitivity falls. In other words, a prescriber and a patient (an increasingly important decision maker especially where a contribution to the cost of treatment is required) will be more inclined to WANT the product in preference to others because they empathize with the brand's promise.

In countries like the USA, where price adjustment following launch is still feasible, this insight and understanding can provide an extremely important marketing option that could help fund increased promotion.

For example, following the launch of an asthma product several years ago, the initial price sensitivity for the brand was calculated (via brand dynamic modeling) to be -1.2 in the first 6 months following launch. What this means is that if the price was increased by \$1, volume would drop by 1.2%, clearly a bad decision. However, in these early months the new brand was only just starting to convey its qualities. Two years later the same brand's elasticity had fallen to -0.6. This time it means that for a \$1 increase in price there would only be a drop of 0.6% in volume. This provides an option to increase price where this is possible, but it also illustrates the value or equity associated with the brand. The result signifies that the decision to prescribe is less influenced by price considerations as the trust and confidence in how and where the brand can be used increases.

Let us return for a moment to re examine what factors should be considered as part of the holistic approach to building a brand.

They can be summarized as follows:-

- The aesthetics of the formulation - its sensory characteristics.
- The approved/generic name - encouraging its complexity when registering.
- The Brand Name - its associations with colour, adjectives/descriptors-positive/negative connotations, ease of pronunciation, recall, possible confusion with others etc.
- Graphic Style of the name - what is conveyed plus implications from any "tag lines"
- Packaging - aesthetics, positive benefits, value of package insert aimed at the end user.
- Price - an important component given its significance in helping to support the brand's position.
- Positioning - developed to create its unique identity
- Advertising - optimizing the "tone" and imagery to convey the composite communication of what the brand offers.
- Additional services linked with the product.

All of the above, not just a few must be intertwined.



Kimberley McCall (1) summarized the factors that contribute to a successful brand as,

"For positive branding to occur, a company must consider every way it touches prospective and current customers - including advertising, public relations, and customer service. All elements of a company's marketing must mesh seamlessly for a new or reinvigorated brand to break through the clutter."

Developing a successful brand will be more important over the next 10 years than it has been in the last 10. The increasing influence of the patient in the decision making process, partly driven by greater contribution to the treatment costs, the wider availability of product information and the increased confidence among patients to challenge the physician's product selection, will mean that product managers must start to commit to a longer term strategy for developing the brand's qualities. Branding to consumers will need to go way beyond DTC advertising (USA; New Zealand; Russia) with the introduction of blogs, web based social networks and U tube becoming critical communication paths.

Far too often we have seen a brand's image change simply because a new brand manager wishes to make his or her mark regardless of what stage the brand's development is in. The outcome is that the "customer" becomes confused about the brand's qualities and positioning: it is small wonder that it becomes difficult to justify why it should be prescribed from others it competes with! This will not be helped by the changes in the ways physicians receive product information. Here too electronic interactivity between sales personnel and the customer is increasing the ability to respond in "real time" to emerging attitudes. This will also lead to increased sales and marketing collaboration on a more frequent basis than has been the case up until now.



There is a very significant role for Marketing Research in the future with regard to Branding Research. All who are connected with the process need to build into their plans the following factors and to think increasingly on a local basis. The adage "Think Globally act Locally" will take on much more significance as the importance of a wider cross section of geographic markets becomes as, or even more important than, the US market in the years to come. This change could be accelerated if a Mrs. Clinton as "President" in 2008 has her way!

Assessing how significant a brand has become in the minds of healthcare customers has not been something that many in the industry have truly grasped the importance of. The frequent changes to a brand's positioning and its qualities demonstrate this. Developing the most appropriate holistic "package" of tangible and intangible features is not easy. It will only become more difficult as time progresses because of the difficulty in controlling the many different information sources that are now emerging: But it must be done if the value of the brand is not to be diluted.

Some years ago I had the privilege and pleasure to work on Prevenar. This brand has continued over the years to develop and enhance its image without resorting to any major changes despite the comings and goings of a variety of product managers. The brand has cultivated all the good qualities that have been mentioned in this article. It has incorporated local market influences to its corporate message and communication, but has retained a theme that has without doubt built trust and considerable equity for the brand. It has reassured parents as well as pediatricians of the brand's qualities. The same theme is being used in its web based communication.



Let's hope we will see more consistency in future communications and brands which set themselves apart from the "herd".

(1) Article on Branding: Kimberley McCall, McCall Media and Marketing Freeport Maine. Contributor to Entrepreneur Magazine and columnist of "Sales Force".

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emerging markets call for **emerging ideas**

Emerging markets have become the main drivers of global growth, offering unique business opportunities to multinational healthcare organizations.

Successful entry and sustainable growth are contingent upon a comprehensive understanding of the competitive dynamics of each individual country, maintaining an acute awareness and timely exploitation of the opportunities and threats that arise.

At facta, we believe that innovation and local knowledge are vital when developing new markets.

Our company understands the industry-specific, technical issues of healthcare-related research and is staffed by local people whose insights allow us to recognize opportunities invisible to outsiders.

For the past 30 years, facta has earned a reputation for providing actionable recommendations with an unmatched flexibility and commitment to quality that only a specialized agency can provide, contributing to the development of sound and successful marketing strategies.

facta | **emerging
ideas**

EphMRA Spring Workshops – Early-Bird Deadline Extended – limited period only

We have had a successful response to the new Business issues related workshops developed by the Primary Research Methods & Training Committee (PRM&T). Please see further details below and **REGISTER TODAY to avoid disappointment** - places are limited and will be confirmed on a first-come first-served based.

Evaluating a Business Opportunity – The Role of Market Research (B1)

This workshop will help market researchers to assess the chances of new products (own developments and in licensing opportunities), using state of the art research tools. Experienced practitioners both from pharmaceutical industry and research agencies will guide the delegates through the various methods and approaches including real-life business case studies. It will also offer a platform for discussion on how to research specific questions and how to achieve buy-in of results of internal customers. The workshop will run in parallel with another workshop and numerous networking opportunities will be available.

How Do I Brand to Win? – The Role of Market Research in Brand Development (B3)

This workshop will discuss and demonstrate the importance of market research in brand development, particularly focusing on equipping delegates with practical guidance on the use of market research in brand development, specifically creating a brand blueprint, bringing a brand blueprint to life, brand tracking and revitalizing a brand. Real-life business case studies will be used and interactive learning sessions throughout.

EphMRA Extended Early Bird Discount Available – Register Today!

Workshop Announcement:

15-16 April 2008
Le Meridien Hotel
Brussels
Belgium

Evaluating a Business Opportunity – The Role of Market Research (B1)

Workshop Convenors

- Werner Gerath (Myocore)
- Alexander Rummel (Payma International Medical Marketing Research)
- Dr. Horst Zoller (Cicentrol)

Workshop Objectives

Using the examples of several "real live" business cases, we intend to discuss methods and tools which:

- Identify and quantify potential product characteristics that represent the drivers of success
- Forecast future developments of current markets in terms of unmet needs, market size, product shares and values
- Estimate volume and value of demand for a new product or product line extension based on a target product profile
- Understand the nature of internal customer needs and expectations and thereby achieving buy-in to analysis and findings

Topics addressed will be desk research, which markets to research, qualitative customer needs (patient, physician, payors, KOL's), therapy behaviour and attitudes, quantifying the opportunity, forecasting tools including conjoint and influencing clinical trial design, time series analysis, segmentation.

Who can and should register for the Workshop?

This course is aimed at those working in an international pharmaceutical market research department or agency with a minimum of 18 months-2 years' experience.

Workshop Registration – register online at www.ephmra.org

Further information on all courses is available online at www.ephmra.org. Please register online or contact the Course Organiser for a registration form.

	Early Bird Fee	After Early Bird
EphMRA Full and Associate Members	£1,095 + VAT (£1,286.63)	£1,495 + VAT (£1,756.63)
Non-Members	£1,350 + VAT (£1,586.25)	£1,795 + VAT (£2,109.13)

Full & Associate Members offer: "Book 3 delegates and only pay for 2"
Other offers: 10% discount available for 2 or more delegates from the same company, 4 modules for the price of 3. See full programme for details.

Final Reminder – Register Today!

EphMRA Extended Early Bird Discount Available – Register Today!

Workshop Announcement:

15-16 April 2008
Le Meridien Hotel
Brussels
Belgium

How Do I Brand to Win? – The Role of Market Research in Brand Development (B3)

Workshop Convenors

- Anns Garofalo (Double Helix Development)
- Xander Raymakers (NV Organon)
- Mike Owen (Brand Health International)

Workshop Objectives

The workshop "How Do I Brand to Win? – The Role of Market Research in Brand Development (B3)" will provide delegates with practical guidance on how market research contributes to:

- Creating a brand blueprint
- Bringing a brand blueprint to life
- Tracking a brand (going beyond USA)
- Revitalising a brand

The course is designed to respond to the following questions:

On a more general level:

- Why branding is not positioning?
- What is the importance of strategic/corporate branding?
- How do I use branding to give a competitive edge in a crowded market?

More specifically in the context of market research:

- What is the importance of researching patients from a branding perspective?
- How is market research going to be used by brand/product managers?
- How do I diagnose a failing brand using market research and what can I do to fix it?
- How can market research tell me if my brand is on track?

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Final Reminder – Register Today!

For full programmes and registration, please visit www.ephmra.org or contact the workshop organiser Nicole Collingwood (training@ephmra.org) or by telephone on +44 (0)1342 851206.

On-Line Training



HOT OFF THE PRESS

The PRM&T Committee is pleased to announce the launch of the on-line Introduction to International Pharmaceutical Market Research Course.

This course is unique and had been developed by EphMRA for the pharmaceutical industry. No new member of your department should miss the opportunity to experience this fundamental foundation course – a must for all new market researchers.

EphMRA would like to thank the Working Party who helped bring this course to life:-

Janet Henson – PRM&T Chair
Anna Garofalo – Double Helix Development
Julie Buis – Aequus Research
Anne Loisele – Abbott

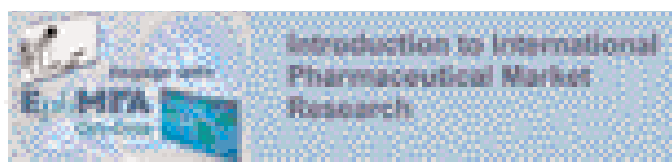
MEMBER DISCOUNTS

EphMRA members only have to pay 840 Swiss France per person for this outstanding course. None Members of EphMRA can also benefit for 1200 Swiss Francs per person.

REGISTER NOW

To register please see our website www.ephmra.org

FULL SCOPE OF COURSE



Introduction to Pharmaceutical Market Research enables delegates to understand the basic principles and latest international practices of pharmaceutical market research. It aims to help learners to develop an understanding of:

- Pharmaceutical Market Research (PMR) and its uses
- Defining Secondary and Primary Research
- Different primary methodologies
- The scope of PMR and its role in the product lifecycle
- The role of PMR and its clients
- The role of PMR in business decisions
- The fundamental elements within research practice
- Using research findings to make a difference
- The role and mission of EPHMRA's International Pharmaceutical Market Research
- Further training opportunities from EPHMRA

Target Audience

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

Learning Outcomes

The Role of Market Research

- The Pharmaceutical Industry - Understanding is vital the process of drug development and testing, and the role that market research plays within the world of pharmaceuticals
 - How is a drug developed?
 - How are drugs tested and regulated?
 - How are clinical trials carried out?
 - What is the role of market research in the industry?
- The Product Lifecycle - looks at the lifecycle of a drug, as a product, and the market research that might take place at each stage of the product lifecycle.
 - What is the product development lifecycle?
 - Where does market research fit into the lifecycle?
- Commissioning Market Research - the process of commissioning market research, from the initial question or request, through to how pharmaceutical companies select and work with agencies.
 - Why do market research?
 - When should we undertake market research?
 - How do we clarify the objectives?
 - What planning needs to be done?
 - How is an agency selected?
 - What process does a market research project follow?
 - How do other people perceive market research?

Secondary Research

- Overview of Secondary Research - what role should secondary research play in a market research project, from helping to define the problem, to clarifying the research objectives and monitoring information gaps.
 - What is Secondary Research?
 - How do we use Secondary Research?
 - When can we use Secondary Research?
 - How helpful is Secondary Research?
 - What are the common pitfalls?
- The Sources - a review of secondary data sources that are available to market researchers and how that data can be identified and categorised.
 - How is secondary data interpreted?
 - What are the main sources of secondary data?
 - What does multi-data look like?
 - What is multi-data useful for?
 - What is multi-data useful for?

Primary Research

This section looks at different primary research opportunities and aims to help you to distinguish and differentiate between the use of qualitative and quantitative methodology. In order to maximise the effectiveness and value of any research you undertake.

- Qualitative
 - What is qualitative research?
 - When can we use qualitative research?
 - What are the main methods?
 - How are research questions and interviews?
 - How do we analyse qualitative research?
 - What can go wrong?
- Quantitative
 - What is quantitative research?
 - When is quantitative research used?
 - How do we collect quantitative data?
 - How is sample size defined?
 - How is a quantitative study structured?
 - How do we analyse quantitative research data?
 - What can go wrong?
 - What other techniques are commonly used?

EphMRA and your career

This module looks at EphMRA and how you can develop and improve standards and techniques for market research in the field of health and healthcare. It also includes details of the courses and publications EphMRA offer to help you progress your market research career within the industry.

- The EphMRA Board
- Advisory Members
- Role of EphMRA Committee
- EphMRA's role in training, members meetings, annual conference and publications

FOR MORE INFORMATION CONTACT

JANET HENSON
conference@ephmra.org

Engaging, Accessible, Anytime, Anywhere

all words that apply to our new
on-line training

ALSO AVAILABLE FROM EphMRA ON LINE -
brought to you by the PRM&T Committee

EphMRA Healthcare Market Research Skills Courses

420 Swiss Francs to Members (600 Swiss Francs to Non Members)

Managing a Research Project



Pharmaceutical companies are always facing new situations. The competitive business environment in which they operate is constantly changing. Companies develop new products and new promotional strategies. Prescribers and users respond to changes in economic, social and legislative systems by changing their product use patterns. New organisations, affiliations and initiatives are continually being born. All these provoke management to ask questions.

These questions need answers. Answers that you as a market researcher are expected to find. This course is designed to help you to improve the quality of research you do, avoiding the common pitfalls that lie between a brief from your in-house client and reporting the results of your research.

The Role of Research through the Product Lifecycle



The role of market research within the product lifecycle is paramount to the marketing success of pharmaceutical products. All pharmaceutical companies need to maximise their products performance within the marketplace, and this requires a high level of market research information and analysis. Market Research has always been key to the success of pharmaceutical companies and products, but today and in the future it is even more important and the importance will certainly increase. This course aims to demonstrate why market research is important and provides an overview of different methodologies that any project might incorporate throughout the lifecycle of a product. The course also looks at the key influencers to research and most importantly effective presentation delivery of the research.



EphMRA Healthcare Business Skills Courses

190 Swiss Francs to Members (250 Swiss Francs to Non Members)

Managing Workload



The healthcare industry is a rapidly changing and evolving area resulting in more and more demands on the market researcher. This demand indicates that senior managers value the internal and external services you provide. However this has resulted in higher levels of skills being required to manage your workload. During the course of your work, you may find that you have to work to tight deadlines. More often than not, these will concentrate themselves at certain times of year. This course will help you learn techniques for managing your workload through identifying your priorities correctly, setting effective goals, and making the best use of your time. It also looks at how you can cope when your workload becomes excessive.

Negotiation Skills

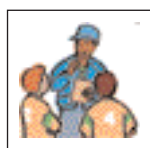


Being able to negotiate effectively will benefit you both in and outside of the workplace. This course will help you to learn some practical negotiation techniques and strategies, and to plan your negotiations to give you the greatest chance of success.

EphMRA Healthcare Leadership Skills Courses

190 Swiss Francs to Members (250 Swiss Francs to Non Members)

Coaching Skills



Coaching is a fundamental part of your role as a manager. It is at the heart of your relationship with anyone who works for you. This course will help you develop an understanding of coaching and how you can use it to get the best out of the members of your team.

Leadership Skills



Many people make the mistake of thinking that leadership is something that only very senior people have to consider. In fact, leadership is a key skill that every manager needs to master. This course will help you to develop your leadership skills and use them to provide direction for your market research team.

Managing from within the Team



As a manager, you are also a member of the team that you work for. This course will help you to balance these two roles and manage your team more effectively from within.

Register Now www.ephmra.org

For more information contact Janet Henson conference@ephmra.org

NEWS from the Committees

Classification Committee

The EphMRA/PBIRG Classification Committee is pleased to announce the establishment of a new Associate position on the Committee. This position on the Committee will be open to analysts with 2-3 years of relevant experience.

The Associate would conduct research into product classification and potential new categories; share responsibility for a therapeutic class, under the mentorship of a full Committee member; attend meetings and join in Committee discussions of therapeutic classes and individual product classifications. Participation in these open discussions with experienced Committee members will provide the Associate with in-depth understanding of the global pharmaceutical industry, a broad range of therapeutic areas, research trends and the industry - WHO relationship. The Associate would also gain knowledge of the audit databases.

The Committee would benefit by having more input and by having a person who could eventually become a full committee member.

The Associate's Company would benefit from the extensive training and the wealth of knowledge that the analyst would bring back to the Company.

There will be a Certificate of Recognition from the Executive in appreciation of the Associate's contributions.

An application form for the Associate position and a description of the position is available at www.ephmra.org, together with a booklet describing the Classification Committee and its responsibilities (Who We Are, What We Do). I encourage you to review this background information and to consider this unique opportunity.

Kind Regards,
Hans-Christer Kahre
 Chair - Classification Committee
hans-christer.kahre@astrazeneca.com

NEW!! ••••• Syndicated Data Committee

(new committee formed from a merger between the Treatment Information and Market Intelligence Committees)

Remit

To build awareness and understanding of syndicated data sources and partnership with suppliers to improve quality and outputs.

Activities

- Develop tools to enable the industry to better understand the range of syndicated data services available
- Build relationships with suppliers to help improve the provision of high quality data and outputs to clients such as training
- Promote and encourage the sharing of best practice with regard to syndicated data sources.

New members wanted - please contact Jayne Shufflebotham of AstraZeneca - Jayne.Shufflebotham@astrazeneca.com

STOP PRESS

NEW MEMBERS OF PRM&T Committee

Welcome to:-

Rachel Sewell - AstraZeneca

Felicina Itote - Abbott

Foundation Committee Update

The EphMRA Foundation Committee 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 Foundation Committee members are:

Dan Fitzgerald	GfK US Healthcare Companies, USA Committee Chair	Group Executive Vice President, Associate Members Group Contact
Jack Bush	Alcon Laboratories, USA	Director, Global Pharmaceutical Marketing Intelligence
Allison Herndon	Norgine Limited, UK	Global Market Research Executive
Angela Duffy	The Research Partnership, UK	Director
Ruth Sambrook	Aequus Research, UK	Associate Director
Dr Philip Stern BSc, MSc, PhD	Warwick Business School	Senior Lecturer in Marketing and Strategic Management and Academic Director of the Executive MBA programme.
Bernadette Rogers	EphMRA General Secretary	Committee support

How You can Help the Foundation

1. Proactively make Suggestions for topics and projects
2. Apply to join the Committee 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 Committee member.
4. Give feedback and input on the value and utility of current projects

The Foundation Committee has recently completed a number of projects:

Doctor Statistics:



1. Doctor Statistics in Turkey
Project completed by Cegedim Turkey



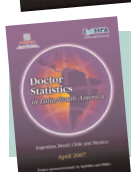
2. Doctor Statistics in Scandinavia
Project completed by GfK Scandinavia



3. Doctor Statistics in India
Project completed by Santosh Gupta of GRAM



4. Doctor Statistics in Asia
Australia, China, Korea and Taiwan
Project completed by Warwick University team



5. Doctor Statistics in Latin/South America
Argentina, Brazil, Chile and Mexico.
Project completed by Pia Nicolini of Brintnall & Nicolini

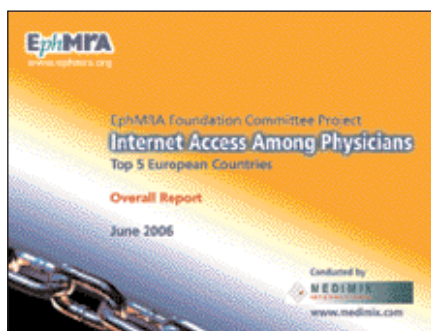
Doctor Statistics reports being developed now:

Doctor Statistics in CEE - 7 country report - Bulgaria, Czech Republic, Hungary, Poland, Rumania, Russia, Slovakia
Project being undertaken by East to West Research

Doctor Statistics in Europe, USA, Canada, Japan
Project being undertaken by Datamonitor

Previous Foundation Committee projects...

Internet Access Amongst Physicians



Project completed by Medimix – in 5 EU countries.

What makes Market Research Useful to Internal Customers - conducted by Synovate Healthcare

What makes Market Research Useful to Internal Customers?

An investigation of attitudes towards and experience of market research among Product Managers and In licensing/ Business Development managers.

A 2004-6 Foundation Project in two parts, conducted for



Project completed by Stephen Godwin of Synovate Healthcare

New Project - to be completed in 2008

EphMRA Foundation and Treatment Information Committee Request for Proposals - Epidemiology Project

www.ephmra.org

The EphMRA Foundation Committee has the honour to request that you submit proposals to the committee, to assist in the development of a new epidemiology project. The project will provide useful information and knowledge and address important issues - relevant to the industry today and tomorrow.

The aim of the Treatment Information Committee is to build awareness of treatment information sources through partnership with suppliers and ensure these services continue to meet the needs of the pharmaceutical industry.

The Foundation Committee is working with the EphMRA Treatment Information Committee to fulfil this epidemiology project and proposals are now invited.

Project Objectives:

To develop an educational 'one stop shop' epidemiology tool which will be easy to use and will demystify the issues surrounding this type of data, thus enabling the market researcher to have a better understanding and comprehension of this type of resource and how it can be utilised in their role.

Part A

Part A will provide an overview and explanation of epidemiology data which will be an excellent resource for either a new starter into the pharma industry or a colleague wanting to refresh their understanding.

Definitions, the how, what, when, where and why surrounding epidemiology data.

This would include:

- What is epidemiology data
- Definitions - what are they and what do they mean
- When to use epidemiology data
- Where to use epidemiology data
- What are the common epidemiology data sources
- Common rules for judging and using data, caveats and pitfalls.

Part B - Case Studies

The case studies will enable the Market Researcher to understand clearly some of the common projects where epidemiology data is used.

The aim of each case study will be to illustrate how typical questions can be approached and answered. A detailed outline of how to go about answering the question, including where to find the data, caveats and pitfalls, further questions to ask would be included. The case studies recommended approaches for 'answers' must be in-depth and thoroughly thought through.

The 4 proposed case studies are:

1. How to build a forecast using the numbers you have!
2. Epidemiology population trends. This would include looking at the aging population as well as disease burden.
3. Market sizing
4. Product potential i.e. if every eligible patient received your product.

In particular the case studies should ensure they cover:

- When to use incidence vs prevalence - at 1 year, 5 year, 10 year time points as well as other point prevalence
- Definitions of appropriate terms eg disease definition including sub indicators along with patient populations
- Where does epidemiology data start and finish.
- Role of market research in defining patient populations

Project Deliverable:

Set of PowerPoint slides.

Continued >

Sharpen your brand.

As a pharmaceutical marketer, you're always seeking to optimise your brand strategies for profitable brand growth.

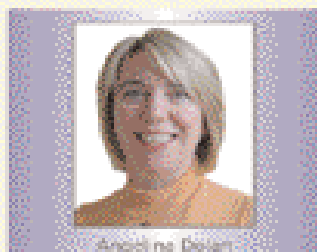
Synovate's Brand Value Creator is the world's first and only research tool that accurately measures brand equity AND market barriers. A complete measurement approach that integrates brand and communications, BVC:

- Examines a comprehensive range of factors that drive physicians' behaviour - not just marketing tactics
- Measures barriers to prescribing a drug, which may include the patient's treatment preferences, insurance coverage, etc
- Enables smarter marketing investment decisions by highlighting the areas which need more attention - e.g., detailing, formulary status, advertising, etc
- Is a universal measurement system: BVC has been validated on 4 continents and is applicable across categories, countries, cultures, languages and geographies

Find out how to sharpen your brand's performance by contacting Bob Douglas at bob.douglas@synovate.com or on +44 (0)20 8216 6223

ASSOCIATE MEMBERS BOARD 2007-09

The elected Associate Members Board is aiming to connect with the Associate Members and to find out what issues are relevant to you, and to find out how these can be addressed within the general remit of EphMRA.



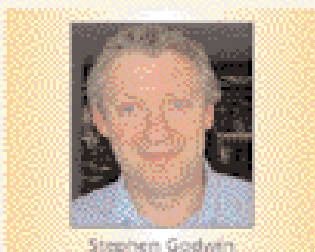
Angelina Dolan

Board Member
Angelina Dolan - Director
Adelphi International
Research UK

angelina.dolan@adelphigroup.com

Angelina has 25 years experience in international marketing research and has previously held positions at Taylor Nelson Medical as well as having 10 years client side experience at Boehringer Ingelheim, Syntex and ICI Pharmaceuticals.

In 1989 Angelina was a founder of Adelphi International Research.



Stephen Godwin

Board Member
Stephen Godwin - Group
Research Director -
Synovate Healthcare - UK

stephen.godwin@synovate.com

Stephen is a scientist by original training but has been in international market research for about 20 years or so. He has wide ranging experience spanning Merck & Co (market research, then product management), Eli Lilly & Co (international marketing), then a period in retail / consulting, before joining Taylor Nelson Sofres in 1993. In 2003 Stephen moved to his/Synovate Healthcare.



Dan Foreman

Board Member
Dan Foreman - Managing
Director - FocusVision UK

dforeman@focusvision.com

Dan has over 12 years experience in research and has expertise in the area of Privacy and Data Protection. He is a non-specialist researcher by background but also has management consultant's experience having spent 2.5 years acting as a Consultant at McKinsey & Co. Dan's career also spans: Planning Director at WPCA Integrated; Director at Indite Marketing Planning; European MR Manager at Kimberly-Clark; Project Director at Added Value and Senior Research Executive at Research International.



Ignacio Macias

Board Member
Ignacio Macias - Managing
Director - Pyima Iberica -
Spain

ignacio.macias@pyima-iberica.com

Ignacio has 11 years experience in International Healthcare Marketing Research and was Vice President at GfK Spain before joining pyima iberica in 2005 where he is Managing Director. Ignacio is based in Spain but has also studied at the University of Pittsburg (for his MBA) and at Harvard University.

EphMRA

EphMRA

Registered Office: c/o Streicher & Brotschin Treuhand AG,
Gartenstrasse 101, 4052 Basel, Switzerland.

1. Invoice Payment Policy for Invoices relating to Membership, Yearbook, Advertising, Training etc.

EphMRA has an established procedure for invoice payment as follows:

- EphMRA issues the invoice and the payment period is 45 calendar days
- 1-2 weeks before the 45 calendar days are up, an email reminder is sent out to ask for payment
- If the invoice remains unpaid after 45 calendar days then the following penalty fee is applied and must be paid in addition to the first invoice amount:

Invoice Amount	Penalty fee added
0 - 1000 CHF	100CHF
1001 - 5000 CHF	250CHF
5001 - 10,000 CHF	500CHF
10,001 CHF and over	750CHF

After 90 calendar days from the date of the first invoice if the first invoice and/or penalty fee invoice remains unpaid then membership of EphMRA is suspended for a period of 12 months from the date of the first invoice.

Companies are unable to participate in EphMRA events, conference, training etc if they have outstanding invoices (ie invoices unpaid after 45 days).

2. Invoice Payment Policy for Invoices relating to EphMRA Annual Conference in Barcelona 2008

All registrations received by 6 March 2008, which remain unpaid by 6 April 2008, will automatically be charged the next level of fees. All registrations received by 1 May 2008, which remain unpaid by 1 June 2008, will automatically be charged the highest fee level. Any invoices that remain unpaid on registration at the conference and after the conference are subject to late payment fee penalties.

Late payment penalty fees:

Invoice amount 0-1000 CHF - 100 CHF late penalty added.
Invoice amount: 1001-5000 CHF - 250 CHF late penalty added.
Invoice amount: 5001-10000 CHF - 500 CHF late penalty added.
Invoice amount 10001+ CHF - 750 CHF late penalty added.

In cases where conference invoices remain unpaid after 45 days then membership of EphMRA is suspended for a period of 12 months from the date of the first invoice.

Companies are unable to participate in EphMRA events, conference, training etc if they have outstanding invoices.

3. Bank charges - for all invoices

The company paying the EphMRA invoice must pay all bank charges when transferring money to EphMRA and EphMRA will invoice for any bank charges deducted during transfer.

2008 Agency Fair News

WOULD YOU LIKE TO WIN A NINTENDO Wii or an IPOD NANO?



EphMRA are running a competition during the agency fair on Thursday 26 June. The competition is open to all Full members; all you have to do is complete a small quiz by visiting agency stands.

We are giving away 2 Wii's and also 8 IPOD Nano's

Entry forms available on site at the agency fair in Barcelona

PRM&T PRE-CONFERENCE MASTERCLASSES

Do not miss the opportunity to sign up for one of our new Masterclass workshops.

DATE - TUESDAY 24 JUNE

WHERE - CONFERENCE 2008 - BARCELONA

TOPIC - SELECT ONE OF THREE:-

1. TESTING MEDICAL DEVICES
2. WAR GAMING
3. GAINING AN UNDERSTANDING AND INSIGHT WITH
CONJOINT AND DISCRETE CHOICE MODELS

ELIGIBILITY - OPEN TO ALL EphMRA MEMBERS ONLY WHO HAVE REGISTERED AS A FULL DELEGATE FOR THE CONFERENCE

COST - IT'S FREE TO EphMRA MEMBER CONFERENCE DELEGATES

ANY QUESTIONS - JANET HENSON - conference@ephmra.org



WANT THE DETAIL?

Testing Medical Devices -

Tuesday 24 June 2008 - 09.00-17.30

Convenors - Dorothy Parker of Fast Forward Research in the UK and Henrik Zöller of Grünenthal in Germany.

Workshop Background

There is a recent trend for less New Chemical Entities (NCEs), and more and more New Technological Entities (NTEs): a great number of technical innovations aiming at beneficial ways to transport existing medications into the body are being developed. Especially the injectable and transdermal administration routes are subject to various innovations that should make the intake of drugs more efficient, with higher safety and more convenience for the patient, and also for medical staff. An example for the benefits of such "high-tech medicine" is modern anesthesia during surgery. But think also of the importance – and eventually lifesaving function - of administration devices in diabetes. As we know, technological innovations of medical devices are closely related to respective administration forms (galenical forms) of the medical substance, so that these two branches of development cannot be strictly separated.

Finally, if we turn from therapy to diagnosis, the range of advanced technology is even greater, not only in radiology and internal medicine, but also in neurology, gynecology, and even in "standard" primary care practice. There should be good reason to have testing methods at hand that may help us to separate TOPs from FLOPs within the highly innovative field of medical devices.

War-Gaming -

Tuesday 24 June 2008 - 09.00-16.30

Convenors - Peter Winters - Canada and Stephen Godwin of Synovate Healthcare – UK

Workshop Background

The importance of developing pharmaceutical brands is paramount in our industry and this course looks in depth at the use of War Gaming to help leverage successful marketing.

Workshop Objectives

The aim of this course is to demonstrate how to think strategically about developing your pharmaceutical brands by simulating competitive responses to business and marketing initiatives. The MasterClass is primarily aimed at market researchers, it will help identify the right data and to ensure that the data is collected is used to best advantage.

Gaining Understanding and Insight with Conjoint & Discrete Choice Models -

Tuesday 24 June 2008 - 09.00-17.00

Convenors - Alexander Rummel of Psyma International Medical Market Research in Germany and Steve Grundy of Marketing Sciences in the UK

Workshop Background

In the increasingly complex range of market and future market scenarios that companies need to assess, it is necessary to provide market research approaches that can deliver better insights on many challenging questions. These can include:

- i) What product features must a product 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 do potential new entrants influence the existing and future market?
- iv) What is the best message set in communication?

Conjoint studies are able to assist with these difficult questions and more!

Workshop Objectives

- i). To provide delegates with practical guidance on the breadth and depth of conjoint approaches
- ii) To enable them to make better-informed decisions when deciding:
 - if conjoint should be employed
 - what type is most appropriate to answer business questions.

ASSOCIATE MEMBER NEWS

PEOPLE



Carly Brown

All Global – an international healthcare data collection agency - has promoted Carly Brown to Client Services Account Manager.



Frank Vezzuto

Medimix International has appointed Frank Vezzuto as Senior Director of Business Development. Frank has extensive experience (The Peer Group, Emron, and MediMedia) among the top 20 and specialty/biotech pharmaceutical companies, working with various therapeutic classes and developing content and questionnaire formation.



Tami Schisel

Tami Schisel joins Medimix International as Sr. Account and Project Manager in the New Jersey offices. Having worked with the government as a strategic planner and later many healthcare research companies, she brings a wide experience of all medical ailments, drug usage, and designing appropriate methodologies.



Mike Zhou

The Research Partnership announces that Daisy Wright has been promoted to the role of Director and both Emma Rummings and Emma Clark are promoted to the role of Associate Director. Also Bay Clark joins as Research Manager and Zoe Brown as Research Executive both based in the London office while Mike Zhou has joined the Asian office as a Research Executive based in Singapore. Mike, originally from Chengdu China, is a graduate of National University of Singapore where he majored in Statistics.



Emma Clark

Lewis Pickett, Nicky Barclay, Sam Fagence and Vicki Hawkes all joined the London office in November as Junior Research Executives on the graduate training program.



The UK office of FocusVision has five new recruits; Annie Upton, Maxine Ellison, Alex Chessun, Victoria Keen and Nicky Burton.

GfK



Eric Robillard

GfK Custom Research France announces the launch of GfK Healthcare France which will provide fact based consultancy to domestic and international clients based in France. GfK Healthcare France is headed by Eric Robillard who has 15 years of experience in the healthcare market.

GKA



Huw Davies, Zoe Baker and Adam Irwin

Gillian Kenny Associates Ltd, specialist healthcare field agency, has made three internal promotions. Huw Davies has become Senior Field Project Manager, whilst Zoe Baker and Adam Irwin have been appointed Project Team Leaders; Zoe for field projects and Adam for telephone and internet studies.

ims | INTELLIGENCE.
APPLIED.



Polly Dryden

IMS Health have appointed Polly Dryden as Public Affairs Director, EMEA. Polly previously worked as Head of Corporate Affairs, Europe, for Astellas Pharma Inc and also held a variety of roles within the Public Affairs Department at Pfizer Ltd.

Ipsos MORI
Health

Emily Thomas joins Ipsos MORI as a Research Director from Research International. A healthcare specialist, Emily has undertaken qualitative and quantitative research for pharmaceutical, medical devices and medical diagnostic companies. Her specialist areas include cardiology, radiology, neurology, psychiatry and vaccines.

Lucy Owen has been promoted to Research Director at Ipsos MORI. A healthcare market research specialist with over 7 years of industry experience Lucy joined the company in 2006. Her specialist research areas include cardiovascular, CNS, musculoskeletal disorders and diabetes.

ZS



Brian Lefebvre



Anja Visser

ZS Associates has promoted Brian Lefebvre to Principal, and Anja Visser to Consultant. Brian joined ZS Associates in 2002, and Anja in 2006. As members of ZS Associates' Marketing Practice, both Brian and Anja serve pharmaceutical clients across a range of issues, including market research, marketing planning and process support, forecasting, launch planning, and implementation support.

DOUBLE HELIX DEVELOPMENT



Mike Mallinson

Double Helix has launched Double Helix Consulting, headed by Managing Director, Mike Mallinson. Based in Double Helix's London headquarters, the new division will focus on market access - pricing and reimbursement insights for the US, EU, Japan and key emerging markets.

fi fieldwork
international
healthcare



Victoria Buffa



Annett Bergner

Victoria Buffa has been appointed Key Account Manager for FI Healthcare, based in the US. Victoria joins FI Health-care from Fieldwork Inc and will be responsible for servicing US based clients running international fieldwork projects.

Annett Bergner has been appointed General Manager for FI Healthcare Germany, based in Munich. Most recently at TNS Healthcare, Annett will continue to build FI Healthcare's services throughout Germany.

W1
WORLDONE
RESEARCH



Stéphane Malka

Stéphane Malka of WorldOne Research has been promoted to Associate Director. Stéphane has been with the company since its inception in 1999 and has wide experience and specific knowledge of the healthcare industry.

COMPANY NAME CHANGE



Facta Research has dropped the word Research from its name and will now be known more simply as facta, to convey its move from fieldwork-related operations towards services such as business intelligence and consulting. A new logo has been designed.



Patient Connections changed its name to Healthcare Landscape. This is due to the fact that it began as a patient-driven research house, but has now expanded into HCPs and ResBlogs.

OFFICE MOVES



Medefield has moved its London headquarters to larger, purpose-designed offices. Medefield's new address is 101 Wigmore St., London W1U (just behind Selfridges); phone +44 (0)207 665 9222, fax +44 (0)207 665 9221, Web site www.medefield.com.



pharma-insight has moved into new offices at the end of 2007.

pharma-insight, Schlagbaumer Str. 59 A, 42653 Solingen, Germany,
Telephone: 0049-212-22671980
Fax: 0049-212-2475826
Web site www.pharma-insight.com
E-Mail: info@pharma-insight.com

COMPANY NEWS



The All Global online panel has now reached over 200,000 healthcare providers worldwide.



FocusVision have recently launched VideoStreaming which is now available in Europe for the first time.



Synovate Healthcare has opened an office in Russia, providing a full range of research services to clients in this fast-growing pharmaceutical market. Leading the operation is Anton Timergaliev who joins the company from Dendrite.



Facta Research has opened a new international division in the US. The San Francisco-based office will expand the company's relationships with existing clients in the US and Europe. Ignacio Krasovitzky, who previously worked out of Facta Research's Mexico office, will head the global team in the US.



Synovate Healthcare has acquired Oncology Inc, a provider of oncology treatment information from US patients to pharmaceutical, biotechnology and financial companies.



WorldOne Research, a specialist in healthcare fieldwork, announces the inauguration of their new GP-Omnibus service. The Omnibus is available to full-service market research and healthcare communication companies on a per question basis, and is run throughout the USA and G5 European countries bi-weekly.



Marketeers Research has completed its pilot phase for its new product "Smart Brand Builder™". Marketeers will start launching "Smart Brand Builder™" in Europe and Middle East in the second quarter of 2008.



GO has a new group discussion unit in the centre of Frankfurt. GO Studio Service has more space and service in a second new interviewing / client unit. GO offers personal, individual support and flexible attention along with good technical equipment.



Cegedim Strategic Data has acquired 3ES, a company specializing in clinical studies and post-AMM (approval from authorities) studies, notably through online tools. The 3ES team (15 people) has joined CSD's international pharmaco-epidemiological team based in CSD's headquarters in Boulogne (France).

2008 Conference Registration Open Now

Register on-line at www.ephmra.org
and reserve your place

