

Over 190 delegates convened in Shanghai!

EphMRA's inaugural conference in Shanghai took place on 27-29 September - and from feedback received so far, it appears it was a great success!

The conference had a real buzz about it, with attendees clearly inspired by hearing some great papers, exchanging ideas and discussing issues.

Over the 2 days, EphMRA kept its finger on the pulse by holding feedback sessions with delegates on how to tailor our services to meet member needs in Asia. Specifically, these discussions focused around future events, Code of Conduct initiatives and training, and we'll be following up on the points raised, and giving feedback, over the coming weeks and months.

The conference evaluation forms have also given us plenty of insights and ideas for future events, including the next conference - on which note we are delighted to announce that **the 2012 Asia Conference will take place in Beijing, 25-27 September 2012!** (full details to be announced shortly).

A separate Post Conference News has been produced for Shanghai; it gives an overview of all papers and workshops and is a great read, so do look out for this.

Also in this issue of EphMRA News, we find out what EphMRA's six committees have been up to in recent months, hear the latest on the Code of Conduct and get an insight into healthcare market research in Poland, Turkey and South Korea. There's also a comprehensive update on all the activities that we as a Board are currently taking forward.

We hope you enjoy this issue. As usual, please let us know if you have any feedback or comments by emailing generalsecretary@ephmra.org.

Many thanks,

The EphMRA Board



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update from the board - 2011 - 2012

EphMRA Executive Board expanded to include more Associate Members

Following a recent change in the statutes (as voted in by Full Members) 3 new Associate Members have now been appointed to join the Board. The Board now comprises 5 Full Members and 5 Associate Members.



Bernadette Rogers
*EphMRA General Manager
(non voting)*



Rob Haynes
*EphMRA President
Merck & Co., Inc
Leader, Global Market Research
& Analytics. Partnerships,
Excellence & Strategy.*



Michel Bruguere-Fontenille
*EphMRA Treasurer
(non voting)*

Full Members



Georgina Butcher
*Astellas Pharma Europe (UK)
Associate Director Marketing
Intelligence*



Beatrice Redi
*Merck Sharp & Dohme
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Understanding Senior
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David Delgado
*Abbott
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James Rienow
*Regional Market
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Kerstin Lilla
*Abbott Products
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Director Global Business
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Established Products*

Associate Members



Bob Douglas
*Global Head Healthcare
Synovate*



Kim Hughes
*Managing Director
The Planning Shop
International Ltd*



Sarah Phillips
*Head of Health
Ipsos*



Piergiorgio Rossi
*Managing Director
SGR International*



Abigail Stuart
*Global Head, Health
Hall and Partners*



update from the board - 2011 - 2012

The EphMRA Board has been working on a number of initiatives and here is an update on a selection of these:

Committee **Liaison** Points

The Board has recognised that there needs to be a closer link between the Board and Committee Chairs and so has put liaison contacts in place. With the larger Executive Board we have now appointed Board member contacts for each committee - this is not to manage or run the Committee but to provide a more consistent link and liaison. It will also provide an opportunity to keep the Chairs more up to date with EphMRA initiatives.

Classification/NFC Committee	Kerstin Lilla, Abbott Products Operations AG and Beatrice Redi, MSD Italia
Data & Systems/Syndicated Data	Georgina Butcher, Astellas Pharma Europe and James Rienow, Pfizer
PRM&T/Foundation	Kim Hughes, The Planning Shop international and Piergiorgio Rossi, SGR International
Professional Standards/Code	Bob Douglas, Synovate Healthcare
Events eg IMM, Conference	David Delgado, Abbott, Spain Sarah Phillips, Ipsos Health Abigail Stuart, Hall and Partners

Events

- **2012 Conference, Paris** - the Programme Committee met in October to review the synopses received (there were 44) and work is underway to outline the topics which will be attractive to members. The Board will review the final list of topics and possible papers for inclusion.
- **2012 Asia conference** - the Board have been discussing the positive feedback from the conference and have been reflecting on the action points going forward. Those who attended in Shanghai (and who are based in Asia) have been contacted by the Board for their location preference for 2012 and Beijing emerged to be the favourite.

The feedback in the conference evaluation questionnaires has shown that training is an important need in Asia for pharma market researchers and so the Board has also been in contact with a small group of pharma and agency delegates to ask them to help EphMRA outline training needs. More feedback will be given once the results of these discussions are made available.

- **IMM 2012** - at the time of going to press the agenda is being finalised with this event aimed at senior researchers/managers and mid level researchers (3-5 years experience).
- **Conference 2013** - we are currently looking at the proposed budget for the 2013 venues and will announce the venue and dates as soon as we can.

Code of Conduct / **Ethics Update** *(see page 10)*

Strategic Plan

The group who met to brainstorm in Basel reconvened by telecon in November and the latest update on the future strategic direction of the Association will be made available soon.

Operating Team

The Operating Team continue to work on behalf of the Association and bring to fruition the initiatives as outlined by the Board - be they events, training, PR, webinars etc. Read all about the work of the OT through the *Inside EphMRA* email bulletins.



Meeting in Shanghai



Thank you to everyone who came to the members' meeting in Shanghai, it was a great turnout, and wonderful to meet so many new people.

Both Full and Associate Members had a good debate on what EphMRA currently offers and how it can represent members needs in Asia.

The conference was warmly welcomed with many members saying how it was a great platform for people to meet and discuss what is happening in the industry. One of the members commented that they had been waiting for EphMRA to come to Asia for the past 5 years, ever since they had left Europe for the Far East. There was a lot of discussion both in the members' meeting and in the feedback sessions for how the conference can be improved going forward. The great news is that there will be a conference in Asia next year.

There seems to be a widespread need amongst members for training for researchers. We discussed different topic areas and what the preference would be for delivery. We will be looking at how we can set this up in a cost effective manner for everyone.

We closed the meeting by discussing the different committees and their work for the organisation - we had a number of keen volunteers to join in.

Thanks from all of us for your ideas and enthusiasm, we have some great ideas to work on, and will keep you updated on progress.

Please do get in touch with us directly if you have any questions, other ideas or wish to contribute.

The AM Board representatives are:

Bob Douglas, Global Head Healthcare, Synovate
Bob.Douglas@synovate.com

Kim Hughes, Managing Director, The Planning Shop international Ltd
kim.hughes@planningshopintl.com

Sarah Phillips, Head of Health, Ipsos
Sarah.Phillips@ipsos.com

Piergiorgio Rossi, Managing Director, SGR International
pg.rossi@sgr-international.it

Abigail Stuart, Global Head Health, Hall and Partners
a.stuart@hallandpartners.co.uk

- **EphMRA Webinar**
Ethics on the Fieldwork Frontline
Tuesday 24 January at 14.00 - 15.00 hours (UK time)
EphMRA is holding a free-to-members webinar aimed at those commissioning and conducting fieldwork. This webinar will address topics specific to those at the sharp end and will provide an update on ethics issues.
- **IMM 2012**
7 February 2012, Sheraton Hotel, Brussels Airport
Registration Open
- **2012 Conference**
The Programme Committee had 44 synopses to review for the 2012 conference - thanks to all who submitted.
The programme is being finalised and developed as we go to print and registration will open towards the end of January 2012.
Venue: Pullman Hotel Montparnasse
- **2012 Asia Conference - Beijing**
25-27 September 2012.
More details to be announced



LIFECYCLE CONTINUES ITS GROWTH.

SGR International is delighted to announce that **Izabel Alix Freret** has joined as associate managing director, heading up the Lifecycle division, reporting to Piergiorgio Rossi, group managing director.

Izabel joins Lifecycle with an exceptionally broad experience in the healthcare sector. Izabel has worked on the client and research sides for the past 16 years, holding various senior positions in market research and marketing in an international environment.

Some details: earlier in her career, Izabel spent 6 years at A+A where she held a variety of senior-level sales, marketing and management positions always at international level. Her research background includes survey design and execution, analytics and forecasting, strategy planning and consulting. Working on the client side, Izabel spent 10 years in several pharmaceutical companies in South Africa and France working in a number of roles including product manager and marketing director.

"Coming from the client side, I understand just how important service is and have always valued SGR International's understanding of the market and their commitment to client service."

SAID IZABEL REGARDING HER DECISION TO LEAD THE LIFECYCLE TEAM, A BUSINESS DIVISION OF SGR INTERNATIONAL.



lifecycle

in the corner with...

Dr Thomas Hein Vice President Global Market Research, Bayer HealthCare Pharmaceuticals



What are your key areas of focus at Bayer HealthCare Pharmaceuticals?

Our core focus is on international primary market research studies, secondary market research, strategic forecasting and competitive intelligence - across the entire lifecycle of products. We enable management to make evidence-based decisions on strategic and operational topics.

Where do you see EphMRA adding value to your activities as a Full Member?

Overall, I value the fact that EphMRA provides a platform for networking between industry representatives, as well as key suppliers. Another big impact has been the creation of an agreed Code of Conduct for primary research, especially the guidance on Adverse Event Reporting. Also - and I would love to see more of them! - the Foundation studies that provide universe analyses of emerging markets are highly interesting and useful for the industry as a whole.

In what areas do you feel EphMRA could increase its impact?

For me, it's about increasing transparency around the quality of available secondary data sources - and also communicating this to the external world. To explain: pharmacos' financial analysts rely on secondary data for financial planning, but they may not be aware of the gaps within it. Another avenue is training - specifically, a modular market research course going from junior to senior level, focusing on methodologies rather than tools, and unbiased by agencies. Finally, I would like to see more 'lobbying' of local authorities on behalf of pharmaceutical companies' market research - like the current work being done to influence legislation around Adverse Event reporting.

If you could change one thing about our industry today, what would it be?

One Code of Conduct across all geographies, rather than different rules for different geographies, would make our lives way easier when it comes to conducting international studies.

What do you think will have the biggest impact on our industry in the next 5 years?

There are many factors but I believe a key one to be increased off-shoring, both on the client and vendor side. This will pose a lot of logistical and quality issues that, if we cannot resolve, will put the quality of market research at risk. Another is the increasing bureaucracy and legislation that is making primary market research more and more complex. Finally, I think it will be critical for us as an industry to develop an in-depth understanding of the so-called emerging markets, and also to closely monitor social media activity and define exactly how it differs from market research (another one for EphMRA!).

Our Reporter In provides the inside track on healthcare market research in countries of interest to us all - from what to remember when researching that market, to the prevailing trends affecting it, to the predictions for its future.

In this issue, we turn our attention to South Korea, Poland and Turkey...

...South Korea



By JungHwa Lee

General Manager, Kantar Health Korea

Global pharmaceutical companies in South Korea are seeking new business opportunities, e.g. entering the generics market, developing new health supplements, focusing on medical devices or Biosimilars.

Where optimising opportunity **means understanding limitations**

Recent estimates have put the size of healthcare market research in South Korea at around USD18 million. Although the need for market research continues to grow, actual market size in terms of revenue seems to have shrunk over the past 2-3 years.

In part, this is down to the decreasing number of patient diary surveys (thanks to increasing patient privacy regulation), which once accounted for considerable revenue due to their large scale.

Another issue is the consolidation of government regulation around marketing activity. For example, the maximum honorarium for healthcare professionals is now 100,000 KRW (USD\$90), which creates challenges around focus group and IDI recruitment and interviewing. Additionally, brand and company names must be masked during interview to avoid MR being used for marketing purposes which, along with the growing need for Adverse Events (AE) reporting, adds time to the research process.

The industry is also likely to be impacted by the Ministry of Health and Welfare's new price-cut regulation; from 2012, drugs with the same molecule will have their prices cut. Initially, this will have a big impact on generics, but original drugs will also be influenced longer term and the market will become more competitive. Pharma companies are likely to become more price sensitive and cut back on research.

Against this backdrop, however, opportunities do exist. Global pharmaceutical companies in South Korea are seeking new business opportunities, e.g. entering the generics market, developing new health supplements, focusing on medical devices or Biosimilars. This means market feasibility and acceptance evaluation studies will be increasingly important. Interest in patients will also grow because of limitations around marketing activities to doctors, and budget cuts should give new impetus to syndicated or secondary data, and digital and online research (although the latter can be challenging in the Korean market).

The key to optimising opportunity is to consult with local specialists to ensure that market research proposals are fully thought out and reflect the limitations outlined above.

...Poland



By Anna Grabara

Senior Research Executive, PMR Research

When conducting research in Poland it is useful to be aware of a number of features that set this market apart from other EU countries - and even from other countries in the region.

A challenging but **fast-growing market**

Poland is a very interesting market, although not an easy one in which to do business for the pharmaceutical industry; after all, with a population of 38 million it is one of the largest markets in the region in terms of potential customers.

When conducting research in Poland it is useful to be aware of a number of features that set this market apart from other EU countries - and even from other countries in the region. First of all, generics have a higher market share in Poland than in any other EU country. Generic medicines account for two-thirds of the market in terms of value and even more in terms of sales volumes. The reason for this is mainly reluctance to reimburse expensive, innovative products. In fact, poor access to innovative treatment is often pointed out as one of the key ailments of the Polish healthcare system.

It is worth mentioning, too, that despite the ongoing lamentations of Polish patients, medications are relatively cheap in Poland. Prices are about 55% lower than the EU averages. On the other hand, patient co-payment is higher than elsewhere, so patients are more on their own. Taking into account the lower purchasing power, medications do prove a serious burden for part of the population.

Finally, Poles like to self-medicate. Sales of OTC products and SOTC (dietary supplements) show far higher sales dynamics than do Rx. Whilst only a small proportion of the pharmaceutical range is available in regular retail outlets, pharmacy distribution is very dense, with a pharmacy for every 3,500 citizens in Poland - compared with every 7,000 in Austria, or every 12,000 in Sweden.

Pharmaceutical market research comprises around 9% of total market research spend in Poland and has been steadily growing over the last few years. Given the growth of the pharmaceutical market, we expect this trend to continue.

EphMRA is on Twitter!
For news, views, info &

EphMRA is on Twitter! For news, views,
info & guidance on all things healthcare market
research, start following us now...



Young, dynamic and **ever-evolving**

With its young and dynamic population, Turkey is a country of opportunity - and, like the country itself, market research is growing fast. To put some figures to this, the sector as a whole produced around USD 150 million of turnover in 2010, compared with \$43 million in 2002.

However, the total share of *pharmaceutical* market research in 2010 was just 5.4%. This showed a slight increase on the previous year (5.3%), but when we look at the years 2006-2008, where the share was a consistent 7%, it seems that healthcare market research has actually shown a slight decline.

In terms of the trends influencing healthcare market research, regulation in Turkey is constantly changing and healthcare is no exception. For example, physicians have always been able to work in a public hospital and a private office on the same day. However, the new 'Full Workday Law' now prohibits them from working in both public and private institutions - forcing them to choose whether to be a civil servant or a private practitioner. This puts physicians in a very difficult position as many work privately to supplement their public incomes. This will definitely affect market research because as physicians' environments shift, so too will what they see, do and prescribe.

In terms of methodologies, doctors are spending more time on the internet and therefore becoming increasing familiar with online surveys - actually preferring to be interviewed in their leisure time to avoid losing patients. Certainly, for those seeking to conduct market research in Turkey, going online for quantitative studies will avoid the headaches!

One final point: for clients in need of accurate recruitment updates from their agencies, expect to receive them no earlier than two weeks before your study begins. Otherwise, you may receive different names every other day...

...Turkey



By Erdogan Gundogdu

Managing Director, Eksen Research

In terms of the trends influencing healthcare market research, regulation in Turkey is constantly changing and healthcare is no exception.

Latest Headline...

There's always plenty happening around the ever-evolving Code of Conduct, and the past few months have been no exception. Here are the latest headlines...

A possible move to a **mandatory Code of Conduct**...

At the June Conference, the decision was unanimous; EphMRA's Ethics Group decided to recommend to the Executive Board that EphMRA mandate the adoption of, and adherence to, the EphMRA Code of Conduct. Consultations with the membership are starting to take place with further discussions scheduled for the IMM in February 2012. All members will be kept up to speed with developments as they happen.

New EU Pharmacovigilance Legislation & Adverse Event Reporting

As many of you know, July 2012 will see new EU pharmacovigilance legislation come into effect that will impact adverse event reporting (AER).

Right now, the European Medicines Agency (EMA) is defining the 'legislative implementing rules' that will impact AER from a market research perspective. The EMA has begun a dialogue with stakeholders through its website, formal public consultations and stakeholder workshops. Based on this process, the rules detailing how the legislation is to be implemented will be drafted, and AER requirements from MR in the EU will be revised.

EphMRA has convened a Task Force of experienced researchers to put EphMRA's view forward within this consultation process, the first stage of which began in November. Again, we will keep members informed of all developments.

Social Media **Guidelines**

The Code of Conduct now incorporates guidelines on the use of Social Media for market research purposes!

These are based on the recently published ESOMAR, CASRO and MRS Social Media Research Guidelines, and members will find that the same basic principles that apply to online and other means of market research - such as face to face and telephone - also apply to the use of social media.

Code **Extensions**

The Code is currently being extended to cover Poland, Russia and Turkey, and we will let you know as soon as these countries are incorporated.

Code **Enquiries**

Code Enquiries are continuing to come in thick and fast, covering a wide range of subjects. Don't forget that if *you* have any questions on the EphMRA Code of Conduct, the Code Query service is available on the website for all EphMRA members.



Code of Conduct Training

Online training & **competency testing**

Online Code of Conduct training is now available to all members **free of charge** and uptake is soaring. Many agencies have now trained their staff and acquired Competency Certification - which companies are increasingly requiring from their suppliers.

The 'What's New?' workshop (the latest news on MR ethics). 13.30 - 17.30, 19 June 2012, Paris

In terms of the next face to face training opportunity around the Code, EphMRA will be holding a half-day workshop on the afternoon of 19 June 2012 - immediately before the Annual Conference in Paris.

Designed to complement the online Code of Conduct training, the *What's New?* workshop will review the latest news on market research ethics - giving all members the opportunity to stay right up to date with the often complex, and always important, legal and ethical requirements for researchers.

Specifically, the *What's New?* workshop will include:

- The implications of the EU pharmacovigilance legislation upon adverse event reporting (the legislation takes effect in July 2012)
- An update on:
 - Guidelines to be aware of when using social media for market research purposes
 - Guidelines for client company access to fieldwork recordings
 - Developments concerning privacy and data protection
- The latest country news as the Code of Conduct is extended to cover more markets

Developed and led by EphMRA, the workshop is designed for healthcare market research professionals, both company and agency, who commission, manage and execute market research.

A more detailed programme, along with further details on how to register, will be made available in January.



As ever, it's been a busy few months for EphMRA's committees! Below are all the latest developments - but first, we catch up with Sanofi's Catherine Beaucé, Chair of the Data & Systems Committee, for a closer look at the activities of the D&SC...

The Data & Systems Committee

Interview with...

Catherine Beaucé - Chair, Data & Systems Committee

As a reminder, what exactly is the role of the Data & Systems Committee?

"Our committee ensures that databases and systems provide the best and most appropriate platforms on which to do international secondary market research. We do this by partnering with major global providers (currently IMS Health & Cegedim Strategic Data) and uniting pharmacos around common goals: sharing experiences and influencing developments to improve existing data and systems."

Where does the Committee add the greatest value?

"All committee members have substantial experience in international data and systems given that they manage these on a day-to-day basis in their work."

"This enables us to have highly productive discussions and deliver strong, actionable suggestions for providers. Then, sharing our experiences from across various types of markets and pharmacos enables us to better anticipate new business needs and effectively analyse the benefits of new developments proposed by providers. This, we believe, contributes to a higher quality and faster evolution of the basic data and systems used by secondary international market researchers. Often, only experts in this area can see how we have progressed!"

"From an internal perspective, membership of the Committee enables us to support the needs of our teams more effectively."

committee focus

What's on the Committee's agenda for the coming year?

"The potential scope of activities is so vast that we need to prioritise our actions in order to stay efficient! We're increasingly involved in data quality issues since market complexity is adding to gaps in this area. In line with new business needs, we try to push developments that support fast and accurate analysis of markets, e.g. international standardisation, market type segmentation (ie. Rx bound, generics, biologics), data coverage or valuation."

How can members keep up to date with the Committee and its outputs?

"Full EphMRA members can find out about the D&SC's activities through the minutes of our meetings, all of which are available on the EphMRA web site. But, we believe that our outputs are more visible in the data and systems that secondary international market researchers use day to day. For example, if you ask how quickly and efficiently they were able to provide the worldwide non-Rx bound market size 5 years ago compared to today, then you will see the real output!"



Catherine Beaucé -
Chair, Data & Systems Committee

Any room on the Committee for interested members?

We now have 8 pharma company members involved in the Committee, but we're always looking for more members to extend our scope of experience and expertise. This will enable us to focus on more areas and more initiatives. The current members of the group are below - why not join us?

Mrs Catherine Beaucé (Chair)	SANOFI
Mr Markus Kaemmerer	ABBOTT Products Operations AG
Ms Jackie Lord	ASTRAZENECA
Ms Petra Mannechez	BAYER Healthcare Pharmaceuticals
Ms Silke Behrendt	BOEHRINGER INGELHEIM GmbH
Miss Jacky Gossage	GLAXOSMITHKLINE
Ms Karen Belentani	NYCOMED, a Takeda Company
Ms Stéphanie Coudière	PIERRE FABRE Médicament

New Member

Stéphanie Coudière from Pierre Fabre Medicament has joined the Committee. Welcome!



Syndicated Data Committee

Open Data

Certainly the SDC's biggest and most important initiative of 2011, 'Open Data' has been created to transform the speed and ease with which EphMRA members can access free, high-quality data on the web.



For anybody not yet using Open Data, it is a repository of relevant, useful and vetted free online data sources, structured around two fundamental types of information: statistical and secondary data on the one hand; and disease specific web resources on the other. It includes global links such as WHO, World Bank, CIA Factbook, Eurostat and OECD Health, with a specific focus on criteria important to members (economic, demographic, healthcare spend, access to healthcare, etc).

One of the key principles of Open Data is that it is ever-evolving; it will be 'refreshed' bi-monthly, resulting in a new database being uploaded onto the EphMRA website every two months. Future plans include a review of usage, feedback and suggestions in January 2012 to enable us to make plans for the second phase of the database. This looks likely to involve developing Open Data as a stand-alone database (rather than an Excel database) and expanding the content in terms of disease area coverage.

Last month, a webinar was held to give members the key facts about Open Data: its origins, methodology, usage and future plans. If you would like a copy of this presentation just email generalsecretary@ephmra.org.

A brand new concept, Open Data is ideal for any EphMRA member with a small amount of time and a big need for free, high quality data - so do check it out if you haven't done so already. (And if you want to give your feedback to the committee about Open Data, you can also do so via the website.)

<http://www.ephmra.org/about-ephmra/ephmra-committees/syndicated-data.aspx>

The Syndicated Data Committee would like to thank Themis for developing Open Data.

How to Reference Data: the SDC is pleased to announce the publication of its revised guide on referencing data. 'Referencing Data: for credibility, clarity and convenience' includes updated guidance on exactly what information is required to make a good reference. You can find this guide on the EphMRA website.

committee focus

Welcoming new members: the SDC is delighted to welcome Stefano Gandolfi and Ana Perez to the Committee! Here's a little more about our new members...

Stefano Gandolfi

Based in Paris, Stefano is Brand Intelligence Manager within the Pfizer Primary Care Division. His current remit includes market research and secondary data analysis for Viagra and the Women's Health Portfolio Strategy for the regional marketing team and 16 Western European affiliates. Prior to this, Stefano was with Pfizer Pharmaceutical in Italy, where his remit included market research and data analysis management.



Stefano Gandolfi

Ana Perez

With an MBA from Edinburgh University, Ana comes from an economics and international business background. Currently Market Insight Manager for Merck Serono UK and Ireland, she began her career in business intelligence within the pharmaceutical industry four years ago. She has worked in the UK and international markets with a primary focus on Neurology and Oncology.



Ana Perez

Contact SDC Committee Chair - Karen Cooper SDCommitteechair@ephmra.org

- **Masterclasses - Paris 2012:** preparation is well underway for the 3 masterclasses to be held during the 2012 Paris conference! We'll provide full details about these in due course but for now we can announce that the topics will be:
 - **Social Networking**
 - **Innovation and Creativity**
 - **Evolving a 360 patient centric strategy in a global business** (concentrating specifically on the doctor-patient interaction and how we could access it to understand what goes on, the subsequent effects and how, potentially, we could influence it. Areas such as adherence, and the psychological aspects of this, will be explored within this context)
- **In-house training - a reminder:** don't forget that EphMRA offers in-house training for any member companies seeking to tailor courses to their needs, to discuss issues in a confidential forum or simply to save time and money on training whilst boosting staff participation. To discuss your specific needs, just contact Sandra McAuliffe at prmtchair@ephmra.org.
- **New members wanted!** there is currently space on the PRM&T Committee for any Full Members with a keen interest in training and a desire to help us deliver our vision of providing leading-edge training, debate and best-practice-sharing on relevant key issues affecting our industry. Please contact Sandra McAuliffe at prmtchair@ephmra.org.

Primary Research Methods & Training Committee

Classification Committee



- **June Meeting** - Basel: the Classification Committee had a packed agenda for our meeting just prior to the June AGM and conference in Basel - including a review of the feedback from EphMRA members on the proposed classification developments for 2012. These include a restructure of the class for BPH (benign prostatic hypertrophy) and the introduction of a class for thrombopoietin agonists. The final decisions will be posted on the EphMRA website after the December meeting. The Committee was also delighted to welcome our Special Liaison Associate member of the Committee from Japan, Etsuyo Ogawa!
- **Birthday Celebrations!** as many already know, whilst EphMRA has been celebrating its 50th Anniversary this year, the EphMRA/PBIRG Anatomical Classification is also having a birthday - we are 40 this year! Throughout the last 40 years, our system has been updated annually and improved greatly to reflect changing market analysis. We thank the many individuals who have contributed to its ongoing development and its continued position of value in our analysis of pharmaceutical markets.
- **September Meeting** - Toulouse: the Classification Committee was delighted to be invited by Pierre Fabre to hold our September meeting in Toulouse. It was a very busy and productive meeting, with many topics reviewed and many decisions made. We thank our hosts at Pierre Fabre, Grégory Senac and Francois Noailles, for making us feel very welcome and providing the facilities for the meeting.

New Form Codes Committee

- **CFC-Free vs CFC Metered Dose Inhalers:** when CFC-free propellants were introduced, discussion with EphMRA members with respiratory products on the market led to the creation of separate NFC classes for CFC and CFC-Free metered dose inhalers. Now, many countries have legislated that only CFC-Free inhalers can be produced, and the information regarding whether a pack contains CFCs appears less prominently. The Montreal Protocol has been signed by 168 countries which implies that, today, the vast majority of metered dose inhalers (MDI) in the mature markets are likely to be CFC-Free products. Therefore, in future, all new packs will be classified as RHQ (Lung Administration CFC-Free MDI) unless other evidence is found. However, both classifications RHP (Lung Administration CFC MDI) and RHQ (Lung Administration CFC-Free MDI) will be maintained as there is still sizeable business in CFC propellant products - in the emerging markets, for example - either in older products or generics. It is also acknowledged that whilst it may be forbidden to 'produce' CFC containing inhalers in developed countries it may still be possible to import and market them.

- **Welcome to new members!** The Foundation Committee is also delighted to welcome a number of new committee members who share our enthusiasm for the Foundation and its benefit to EphMRA members. The Committee now consists of:

- Christin Firchau (*Pfizer*)
- Felicina Itote (*Abbott*)
- Su Meddis (*AstraZeneca*)
- Professor Philip Stern (*Loughborough University*)
- Angela Duffy (*The Research Partnership*)
- Steve Kretschmer (*IPSOS*)
- Jessica Santos (*WorldOne*)
- Sally Birchall (*foundationchair@ephmra.org*) - Chair

Any of the Committee's members would be happy to tell you more about the Foundation and its work.

- **A quick recap on the Foundation Committee:** as a reminder, Foundation projects provide an ideal opportunity to explore issues and questions that would otherwise remain unexplored - due, for example, to lack of funding within a specific product or agency budget. One example might be general questions about a particular country market, forming the basis of a reference document for daily use (e.g. Internet access in Russia, doctor statistics in Turkey). Another might be a critical evaluation of methodological questions in the context of their application to the healthcare sector (e.g. cultural differences in physicians' responses to rating scales, new developments in neuroscience and their application in the healthcare setting).
- **BRIC Physician Internet Access Study:** the most recent Foundation project (Physician Internet Access in the BRIC countries) was very well-received, with findings disseminated via a live webinar, a poster at the conference in Basel, an overview at the conference in Shanghai, and the full individual country reports published via the EphMRA website. Thanks to all for your interest in this project. We have since been asked to extend the project to include other countries and would like to prioritise the markets of particular interest to EphMRA members - **so do please let us know where YOUR interests lie! Just email foundationchair@ephmra.org.**
- **Forthcoming projects:** the process of selecting the next Foundation project topics has now begun. We held an open 'drop-in' session at the Foundation committee meeting in Basel in June. Thanks to some inspired suggestions from EphMRA members throughout the year, and the enthusiastic and creative discussion from all those who joined us at the drop-in, we produced a list of 23 topics for possible Foundation projects. We think this must be a record! The committee is now evaluating each one and compiling a shortlist of suitable projects to put forward to the EphMRA Board as potential Foundation project(s) for the coming year. There are a number of factors that are taken into consideration when selecting project topics, including: relevance and value to EphMRA members; "fit" with the remit of the Foundation; the practical feasibility of conducting a project; and budget available. We hope to finalise the approved project topics soon and will keep members informed.
- **Get involved!** The Foundation welcomes involvement from any EphMRA members - whether it's to suggest a future project topic, to help deliver a project of particular interest to you or your business, or to join the Foundation as a full committee member. If you would like to know more, please don't hesitate to contact us! (foundationchair@ephmra.org)

A date for your diary!



2012 EphMRA

**Asia Pharmaceutical
Market Research Conference**

Beijing, 25-27 September

Details to follow - hold the date



EphMRA Planner 2012



National holidays **at a glance**

EphMRA has created a 'Planner' that displays, at a glance, the significant dates in many of the countries of importance to healthcare market research.

This information is not - to our knowledge - available in one place elsewhere, so we hope it will aid you in the planning of international fieldwork, meetings and other events.

Please note that the EphMRA Planner should be viewed as a handy guide only. We have collated the dates to the best of our ability, and would very much like to thank those members in local markets who have checked these dates for us (credited at the back of the Planner). However, state / regional holidays are not included here, some holidays will be observed by some and not others, and the dates themselves may be subject to change.

For this reason, we will be reviewing, updating and adding countries to the planner on an on-going basis - therefore, if you have any suggested additions or amends, please let us know at generalsecretary@ephmra.org.

You can download the EphMRA Planner here:

<http://www.ephmra.org/publications--resources/other-resources.aspx>

YEARBOOK 2011

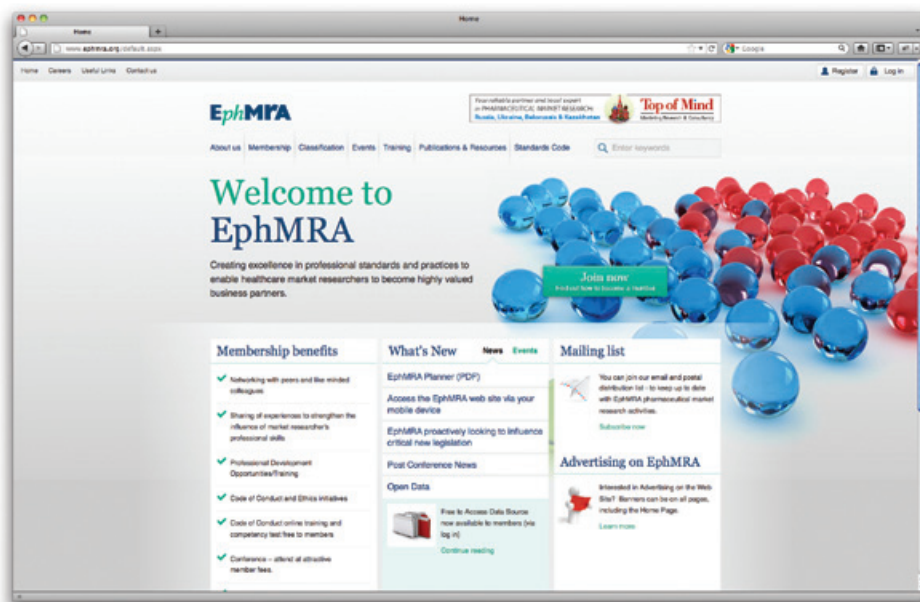


All members should have received their copy of the Yearbook which was posted in September.

We are currently developing a new online updating system for Associate Members and will keep you posted as to when this will be ready.

The EphMRA web site has undergone a face lift! In September, the new look web site was unveiled; not only is it much fresher, it will hopefully be far easier for members to navigate.

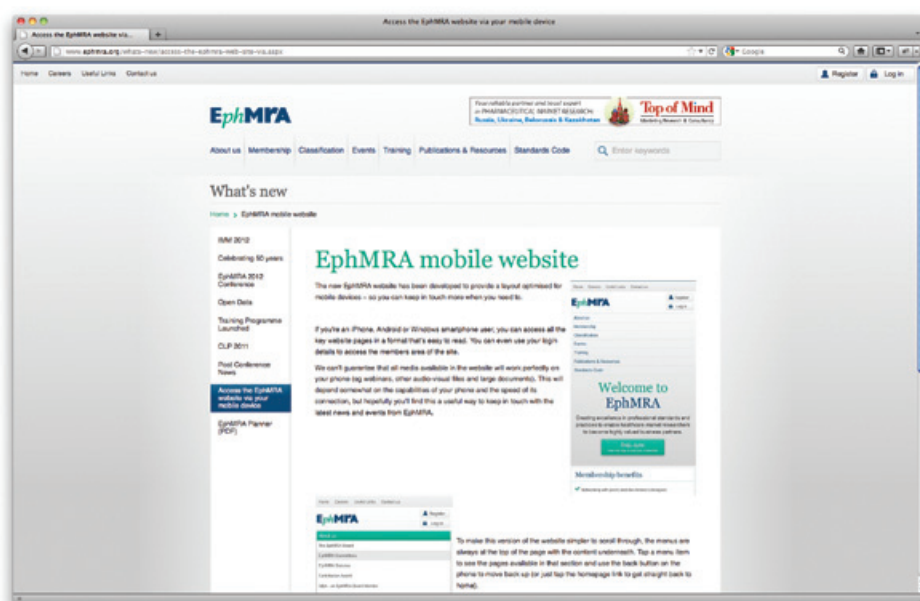
Web Site Refreshed



How to get a password?

In the top right hand corner of the web site you can register for a password (by creating a profile) and once approved by EphMRA you are all set to go.

You can also access the site via your mobile device - we have developed a specific template for this ensuring you can interact with the site wherever you are.



People News

Praxis is delighted to announce the appointment of Sue Rees as Research Director. Sue has over 20 years experience spanning agency and industry in both qualitative and quantitative research disciplines.



PRAXIS

Healthcare research in global markets



Hannah Baker Hitzhusen joins SKIM-Healthcare as Account Director. Based in SKIM's Rotterdam office (additional offices: Geneva, London, NYC), Hannah brings 15 years of US pharmaceuticals and agency experience.



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www.skimgroup.com



Medimix Europe announces the appointment of Dorian Couffignal as Insights Manager - Analytics to its London office. Dorian is a graduate of MSC Marketing Management, EDHEC Business School, France.



MEDIMIX
International



Phoenix Healthcare announces the appointment of Delphine Duchateau as a Group Director based in Richmond, London. Delphine joins from Hall & Partners and will focus on research and client service.



Phoenix.

Healthcare



Instar has expanded its fast turnaround physician market research service to clients in Europe and Asia. Jean-Olivier Marty joins as Director of European Business Development.



Illitch Real has been promoted to Account Manager. With 12 years of experience, his drive for excellence will be a valuable and dynamic addition to the Client Team.



research solutions



Julia Davies

Double Helix broadens the expertise of its London HQ Global Market Research division with Research Manager, Julia Davies and Senior Research Executive, Lena Belz joining the team.

double helix

People News



The Research Partnership has appointed Richard Head as Director, working within the EU team at the London Headquarters. He joins a team of 13 Directors and 70 global market researchers.



WorldOne, the global leader in healthcare data collection, announces Richard Hall as COO. Richard's focus will be on managing and expanding WorldOne's operations through idea creation, innovation and superior execution.



ANTERIO is pleased to welcome Tom Kojima, formerly of InterfaceASIA, as the new Director of our Global Research Dept. Tom will lead efforts to expand our global business operations.



Rebecca Teusch has joined pharma-insight GmbH to strengthen our quantitative research team. In her last position she was responsible for the development of statistical models and new quantitative methods. www.pharma-insight.com



Marketeers Research welcomes its' new family member Dr. Randa Raafat. Randa, through her professional pharmaceutical background, add technical expertise to the Pharmaceutical team for excellence in research based consultancy service



Anna Ettl joins as Senior Research Executive with experience in both qual and quant healthcare research at ZS. Tom Parkinson joins the field department (from Adelphi) as a fieldwork executive.



Elma Research is pleased to announce that Antonella Beriola will manage our new facility in Rome downtown. Please check our website (www.elmaresearch.com) for information about our Milan and Rome offices.

People News

Ipsos Health congratulates Samantha Hope on her promotion to Associate Director, and Emily Peasgood on the birth of her baby, Matilda Rose.



Ipsos Health Division

Welcome to new starters Madeline Nightingale, Huw Harvey, Robyn Cox, Lizzie Thomas and Julie Culley and congratulations to Kirsty Page, Issaree Maitrewong, Pete Glover and Marissa Stewart on their promotions.



In London, WPP-owned healthcare panel specialist All Global has appointed Daniela Dodaro as Director of Business Development, responsible for managing and growing key accounts.

Founded in 2002, All Global provides data collection services to the medical and healthcare market research industry worldwide.

Dodaro joins with more than seventeen years' business development experience in the healthcare research sector. Since 2005, she has worked at

online physician data collection specialist Medefield, prior to which she was Marketing Manager at Fieldwork International (now part of Synovate).

All Global CEO Tony Burke comments: 'Daniela brings invaluable experience to our team at an exciting point in our growth. To ensure that we retain our reputation as the provider of the best quality healthcare research in the business, it's important that we hire the best people and Daniela has an excellent reputation and strong track record.'

www.allglobal.com

Services News



Black Swan Analysis announces the launch of their Epiomic™ Segmentation Tool delivering specific patient populations based on physio-pathological profiles. Modules to launch first include Heart Failure and Diabetes.



The Willow Group is now a member of GA Communication Group. TWG will function independently focused on providing clients innovative consultative solutions to reduce their risk in decision making.



Specialists in data collection, we have now a new division of Mystery Shopping, also applied to Healthcare. Your partner to conduct fieldwork in Portugal.
www.intercampus.pt
master@intercampus.pt



Medefield has launched a series of free webinars covering top tips for effective fieldwork in Asia. Go to www.medefield.com for more information on the next session.



Based on our 15 years of HIV ad hoc and syndicated tracker experience, STETHOS International announces its newly formed department entirely dedicated to HIV market research, led by Rachel LeRoy



Enhanced scope of use of our unique positioning tool iCONSULT Matrix™: Combined market structures integrating HCPs and patients. For unrivalled market understanding and potential analyses.
matrix@iCONSULT.de

Company News

Branding and market research consultancy Omega Insights has now opened an office at the new Lake Geneva Business Park, near Geneva, Switzerland. The centre offers excellent training and conference facilities.

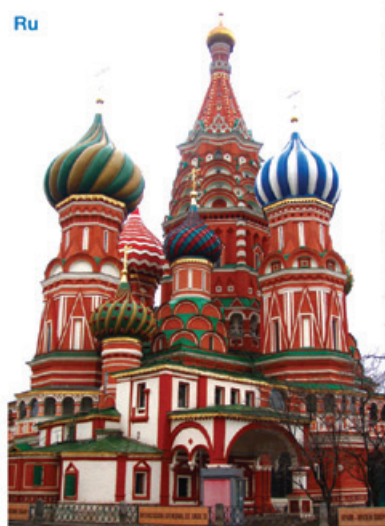
omegainights
guiding you to insightful branding decisions

Marcin Rzepka, Head of Research Services in PMR Research, gave a presentation at the SPSS Poland conference on 'Exploiting innovative data-gathering techniques in pharmaceutical research in an international setting'.

PMR
R E S E A R C H

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Ru



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- Quick feedback regarding costs and feasibility

Top of Mind

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EphMRA's Guiding Principle

“Creating excellence in professional standards and practices to enable Healthcare market researchers to become highly valued business partners”

How does EphMRA **benefit the industry?**

- Adds rigour, credibility and commercialism to healthcare market research
- Creates the base for a professional healthcare market research career
- Provides data, information & guidance on industry-critical issues
- Fosters open communication, critical in today's shifting landscape
- Brings collective power & influence to bear on legislative changes
- Harnesses collective investment in the industry's future

How does EphMRA **benefit you?**

- Ongoing news, updates & guidance from EphMRA
- Access to EphMRA Code of Conduct & Query Service
- Access to free original data from Foundation Committee studies
- Access to publications, the Lexicon & other resources
- Peer-to-peer networking & contacts
- Involvement in EphMRA committees
- Preferential rates for EphMRA Annual Conference
- Free attendance at pre-conference one-day masterclass training
- Preferential rates for EphMRA training courses
- Invitation (free) to annual Interim Members Meeting (IMM)
- Supplier networking & contacts (Full Members)
- Free full-page entry in EphMRA Yearbook (Associate Members)
- Free announcements in EphMRA Newsletter (Associate Members)

Next steps

See full details, including fees for Full and Associate memberships, online at <http://www.ephmra.org/membership.aspx>.

Alternatively, contact generalsecretary@ephmra.org.



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Target Your Audience

Advertise with EphMRA - either www.ephmra.org or EphMRA News - and you'll get your message out to a vast and targeted audience of international and locally-based pharmaceutical market researchers.

Who? All EphMRA members - both Full (client-side) and Associate (agency-side) - are involved in multinational or national pharmaceutical market research and / or business monitoring.

How many? The EphMRA website has over 11,660 page views and 2,500

unique visitors each month, with the average time on site being 3 minutes. Meanwhile, EphMRA News is disseminated to 2400+ EphMRA members and contacts.

How much? For full details of ad specifications, costs and deadlines, find our media pack online at

<http://www.ephmra.org/web-site-advertising-details.aspx>.

Alternatively, just contact

generalsecretary@ephmra.org.

get in touch

If you have any enquiries, suggestions or feedback, just phone, fax or email us:

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Tel: +44 (0) 161 304 8262

Fax: +44 (0) 161 304 8104

Email: generalsecretary@ephmra.org

www.ephmra.org

If you
have any
enquiries

March
News -
Copy deadline

EphMRAnews
march 2012

keeping members informed and involved

January 15th is the deadline for submitting your copy for the **March** News. Send it to generalsecretary@ephmra.org

Other News
Copy Deadlines:

News Published
June 2012
September 2012

Copy Deadline
15th April 2012
7th July 2012