

keeping members informed and involved

All eyes on Paris, France

June is certainly a big month for the Association, with final preparations underway in all quarters for our Annual Conference in Paris.

It's not just the final preparations for Paris which are a major focus right now but there are also two upcoming Local Chapter meetings - Italy and CEE (Warsaw). Members can attend these geographically focussed meetings free of charge and we invite non member companies to also attend the first meeting on a complimentary basis. These are exciting new initiatives and designed to tailor our offerings to specific member groups. See page 25 for more details.

We are pleased to report that despite tough economic conditions the conference registrations are at a very good level and it looks like we're on course for a great event! For more on the conference, just turn to page 26. Registration is also open for the 2nd Asia meeting in Beijing, 25-27 September 2012.

What else will you find within these pages? In addition to our regular line-up of news and views on the conference, our committees and our Code of Conduct, we feature again - 'Our Reporter In' - which gives us the inside track on healthcare market research in Germany, UAE and Sweden. We also have The Board Report and an Update from the Associate Members on the Board.

We hope you enjoy the issue; as always, please send any feedback or enquiries to generalsecretary@ephmra.org.

The EphMRA Board



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A Focus on the EphMRA Foundation Committee



Where else could you fund projects that don't have a direct bearing on a particular product's marketing success or the profitability of a specific pharma client account?

Remind us briefly of the role of the Foundation Committee?

The Foundation is a unique resource for all EphMRA members. We conduct research (primary or secondary) to answer questions of greatest value to EphMRA members in their professional lives.

Can you give us an example of the types of projects funded?

Projects are wide-ranging; a recent one looked at the extent and nature of internet access in BRIC countries and the implications for online market research; a current project involves the creation of Country Capsules, which provide a "cheat sheet" of healthcare background and handy hints and tips for conducting research in a given country. These are the "practical" or "methodological" projects which provide a valuable resource or reference report for daily use.

What other types of projects do you fund?

We also fund "innovation evaluations" - where new approaches or buzz-topics are emerging, but we're not yet sure if and how to apply them in our daily activities. Current examples of topics that we are exploring include a project in the area of neuroscience and its application to market research, and another in behavioural economics.

Who decides which topics will be explored by the Foundation?

The EphMRA members decide! Anyone can put forward a suggestion for a topic and members of the Foundation committee also keep their eyes and ears open for topics of potential interest to EphMRA members. Projects have to be relevant to the EphMRA members who fund them, "fit" with the ethos of the Foundation, be feasible at a practical level and also involve a realistic budget. All Foundation projects have to be approved by the Foundation Board.

Where do you think the Foundation adds the greatest value?

I personally feel that the Foundation is an amazing resource for EphMRA members. Where else could you fund projects that don't have a direct bearing on a particular product's marketing success or the profitability of a specific pharma client account? In the current economic climate, can you imagine going to your Brand Director or agency CEO and securing funding to explore how physicians in different countries respond to frequently-used rating scales?

Foundation projects provide an ideal opportunity to explore issues and questions that would otherwise remain unexplored, but which enhance our expertise and the quality of our everyday work.

What projects should members expect to see this year?

We are running three projects this year, which should keep us all busy!

Market Research and Adverse Event (AE) Reporting is a project designed to support the EphMRA Ethics Group in revising the EphMRA AE Reporting guidelines later this year, following the publication of the new EMA legislation implementation guidelines.

The second project, **International Comparison of Norms for Frequently-Used Scales**, is being conducted in the BRIC countries. It will examine cultural differences in response to commonly-used scales within these markets, establish “norms” for each country, and most importantly, offer practical guidance on how to interpret these country-specific responses within international studies.

Throughout the year, we will also continue to publish individual **Country Capsules**, starting with Turkey.

Who are the Foundation Committee members?

The Foundation committee keeps a balance of pharma company and agency members, along with a member from academia to provide academic rigour to our projects. An up-to-date list of who's involved can be found in Committee Focus.

Is there any room for new members?

We don't have a maximum committee size, so as long as both Full and Associate members keep expressing an interest to join, we are very happy to make use of more person-power! You don't always have to become a fully-fledged member of the committee - you could be co-opted onto the committee to help with a specific project that is of personal interest (or of commercial interest to your employer) but with no on-going commitment beyond that. The simplest way to contribute to the Foundation is to suggest a potential Foundation project topic.

What do you see as the greatest challenge for the Foundation over the coming year?

I think that we have always suffered from a lack of identity amongst EphMRA members. A key activity, therefore, is to try to publicise the committee and communicate its activities more effectively, to help EphMRA members to identify the body of work that has been produced to date and to encourage more active participation in the whole process of project topic suggestions.

Don't hesitate to contact any of the Foundation Committee to find out more or to get involved. Come and meet us at the Drop-in session we have planned in Paris - 11.00 to 12.00 on Tuesday 19th June or send in your suggestion for future Foundation projects. We are at your disposal!

For any further information about the EphMRA Foundation and its activities, or to suggest a potential Foundation project, please contact any committee member or the Foundation Chair (foundationchair@ephmra.org).

Come and meet us at the Drop-in session we have planned in Paris - 11.00 to 12.00 on Tuesday 19th June or send in your suggestion for future Foundation projects.

...on an
important
topic

The Board REPORT



Member feedback on the move to a Mandatory Code of Conduct

In Q4 2011, EphMRA opened up a period of consultation with members about their thoughts on a move to a mandatory Code.

Comments received from the membership were overall positive.

In general Associate Members (suppliers) were in favour of the move to a mandatory Code.

Full (pharma) Members were overall supportive about the change to mandatory but did raise some very specific and valid concerns. These focussed on how it might work in practice in terms of fitting with their own internal Codes and thoughts about whether there were any legal implications for their company if the Code was mandatory.

The members' comments were very well expressed and have raised a number of issues with regards to how EphMRA would introduce and implement a mandatory Code and what impact it might have on the membership and the Association.



Next Steps

The Executive Board have thus asked the Code Steering Group to look in-depth into the implications of a mandatory Code. The Steering Group has already held a number of useful discussions with other market research Associations who have a mandatory Code and are putting together a picture of the process and resources needed.

Initially it was considered that a members vote on a mandatory Code would be taken by June this year but this will no longer be possible - moving to a mandatory Code could be a 12-24 month process in order to get it right for our Association.

It was agreed at a recent Board call that a Discussion Paper will be written and made available by June to the membership and this will give as much information as possible to members so that they are fully informed about what might be involved in moving to a mandatory Code. The possible cost of the resources needed to support the move will be assessed.

This Discussion Paper **will cover:**

1. Future Scope of the Code of Conduct - streamlined or detailed?
2. Adverse Event Reporting - what standards will be in the Code
3. How to keep the Code of Conduct up to date
4. Consultation on Code changes
5. Legal consequences and liabilities - Legal Adviser needed
6. Insurance for the Association may well be needed
7. Enquiries - how will these be handled
8. Membership - any impact to be assessed
9. Grievance procedure
10. Training & Competency Testing

The Board will be liaising with the Steering Group and supporting the development of the Discussion Paper ready for June.

update from the associate members

We hope you are reading this update either in Paris or en route to Paris for the annual conference. We are all looking forward to seeing you there.

Since our last update, we hope we have established a more regular and better platform for listening to you, hearing your concerns and ideas and taking them to the Board meetings for action. To achieve this, we have set up teleconferences before each Board meeting, run a session at the IMM in Brussels and we will be holding an Associate Members meeting in Paris. Please do come along and hear what has been happening as well as give your point of view. Everyone is welcome!



Some of the highlights of the past 6 months we have been involved in:

- **Proactively looked to influence legislation about adverse event reporting**

EphMRA has joined the EMA consultation process which will impact adverse event reporting. In addition, we have been looking at the code of conduct and whether or not it should be mandatory. This is a complex issue with many legal implications, which will take some time to work through and resolve.

- **Communication review and assessment**

We have put together an overall communication strategy and reviewed the different pieces of communication EphMRA does to ensure that they meet these objectives. We are making sure that we aren't missing out on new platforms and that the benefits of the organisation are clearly articulated and well understood.

We are also providing local forums for members input and networking opportunities, the first of these will take place on **5th July in Milan**. If you are a member in Italy, please do register to attend. We are planning a second meeting for those whose remit covers CEE in **Warsaw on 7th November**.

- **Supported training initiatives with the PRM&T committee and projects with the Foundation committee**

The PRM&T committee have worked hard to provide training which is relevant and effective, but also economically viable in the current financial environment. This has not been an easy task; the AM Board supports their approach and efforts.

The Foundation committee has sent out two RFPs for projects, on adverse events and norms for frequently used scales. The AM Board is very supportive of the Foundation's desire to have a stronger committee identity, which hopefully will be launched soon.

As your representatives on the Board, we are here to allow you to have a say in the future of EphMRA how it is organised, how it operates, the services it provides and the issues it focuses on. We welcome all feedback and look forward to seeing you at the AM Meeting at 17:15 on Wednesday 20th June, and throughout conference. If you aren't going to Paris, please do feel free to contact any of us directly.

Best wishes

Bob Douglas - Global Head of Custom Research, Ipsos Healthcare - bob.douglas@ipsos.com

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in the
corner
with...

Georgina
Butcher
Associate Director
Marketing
Intelligence,
Astellas Pharma
Europe Ltd.



I strongly believe that EphMRA continues to deliver fantastic value to its Members across a range of areas.

What are your key areas of focus at Astellas Pharma Europe?

Astellas is a top 20 global pharmaceutical company employing over 16,000 employees globally. Astellas is dedicated to improving lives of people through innovative and reliable pharmaceutical products, with the focus on six key therapy areas: Transplantation, Urology, Dermatology, Oncology, Anti-Infectives and Pain Management.

At the EphMRA IMM (February, Brussels) there were discussions about the core competencies that are needed to build a successful career in market research. What is your view on the skills set needed?

It is a given that a market research role requires strong skills in communication, project and people management, influencing and negotiating, good knowledge of the healthcare industry and market research techniques. It also requires you to ensure that you are adaptable and able to work with different teams. The market researcher needs to be the 'eyes and ears' for the organisation, for a brand team or other stakeholder groups. This requires passion and curiosity to seek out real 'insights' that supports the company in making informed decisions and to move the business in the right direction.

What attracts you to continue to develop your career in healthcare market research?

A passion to understand all customers and how they engage with our brands, as well as the generation of new ideas or modifications to existing market research methodologies that deliver great insights and data. It is a continual learning process and one that I continue to find exciting and stimulating.

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

I strongly believe that EphMRA continues to deliver fantastic value to its members across a range of areas. The opportunity to provide input to the continuous evolution of the Code of Conduct is one of the high value activities for me personally. The Code provides clear guidance to conducting international healthcare market research in a fast changing healthcare environment. The work of the various Committees is also something that I highly value, especially the Syndicated Data and Classification Committee.

In what areas do you feel EphMRA could have greater impact?

EphMRA is for all Members and the greater the involvement, the more benefit will be gained from existing activities. I strongly believe that the Code of Conduct will increasingly influence the way we work in the healthcare industry. Sharing of high quality and innovative best practice will allow market research to deliver critical and meaningful insights and data and help the industry continue to invest and develop the medicines that truly meet unmet needs.

The Post Conference News will be mailed out in the summer of 2012. This gives a comprehensive overview of all the Conference papers as well as reports from the Training courses.

If you would like to advertise in the News please let EphMRA know by 6th July 2012 - contact generalsecretary@ephmra.org

ADVERTISING SPECIFICATION

	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	–	70mm x 50mm

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. 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, Zip Disc, Floppy Disc and Email are available
File Formats	Graphics should be supplied (CMYK) in the following formats EPS, TIF, JPEGs

PRICES (CHF)

	Colour		Colour
Box ad	100	Quarter page	600
Half page	850	Full page	1400

CHF = swiss francs

interim members meeting report

7 february 2012, brussels

Introduction

Lively debate, knowledge exchange and networking were the order of the day at EphMRA's Interim Members Meeting held on 7 February at the Sheraton Hotel, Brussels Airport. For the first time, the 90 Full and Associate Members were joined by a group of mid-level researchers, who attended a stream of sessions designed to help them gain even more valuable knowledge and to give them the opportunity to network and discuss their work with their peers.



Thomas Hein, Bayer



EphMRA Market Research Case Study Award winners

Top of the bill for the senior researchers stream was a debate on the Market Research Department of the Future, introduced and led by Thomas Hein, Vice President Global Market Research at Bayer HealthCare Pharmaceuticals. For mid-level researchers, highlights included an overview of the competencies and skills need for a career in market research and an introduction to Market Access.

During the afternoon, the delegates came together to listen to an update on EphMRA's Code of Conduct and for the presentation of the EphMRA Market Research Case Study Award, won this year by an innovative project led by AstraZeneca and Fast Forward Research.

Senior member's session

If market researchers want to survive in the tough economic climate, they have to deliver insights as internal consultants and focus on value-adding activities. This was the message delivered by Dr Thomas Hein, Vice President Global Market Research, Bayer HealthCare Pharmaceuticals, sparking a dynamic debate on the topic. The debate was further developed on the day by PRM&T Committee members Anna Garofalo, medeconnect and Alexander Rummel, Aurum Research.



interim members meeting report

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“Will market research departments exist in ten years’ time?” asked Dr Hein. “I believe that if some preconditions are met, market research departments will survive and flourish.” Market research departments must deliver recommendations based on professional market research and their own experience; this means a focus on insights not data, clear recommendations, not 200 slides, he said. “If they do this, if market researchers are perceived as internal consultants that add significant value, then there may be a future for the internal market research department,” he said.

He cited six preconditions that a market research department needs to meet in order to flourish:

1. Choose market researchers with the right skills and personalities
2. Outsource all activities that do not add value
3. Focus on product and/or therapeutic area and strive to deliver insight
4. Embrace diversity as it sparks new insights, stimulates new ways of thinking and increases innovation
5. Retain independence
6. Define the career paths of market researchers.

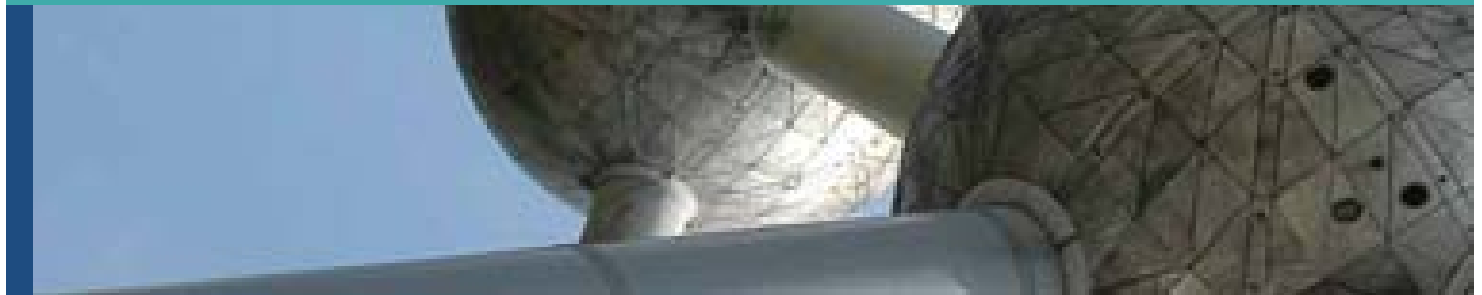
Focusing on the first precondition, Dr Hein said market researchers must have: a statistical background and experience in primary market research approaches; a good knowledge of secondary data and its caveat, including epidemiology; and, experience in strategic forecasting. In addition, successful market researchers also need the following essential skills and personality traits; an inspiring and convincing personality, business acumen, a statistical sense and the ability to think analytically, great communication skills, flexibility and speed, an eye for detail and, finally, objectivity.

“Will market research departments exist in ten years’ time?”



interim members meeting report

7 february 2012, brussels



“Drudgery is preventing us from realisation the dream of becoming internal consultants”

“We must make market research sexy! Top people with the right skills and the right personality are not choosing market research so how do we attract them?”

Dr Hein's vision of the Market Research Department of the Future sparked considerable lively and informed debate. “Drudgery is preventing us from realisation the dream of becoming internal consultants,” said one senior market researcher. “High-value people are required to work on low-value work and the enemy is the checklist, the list of research that must be done whether it is needed or not. We need to talk business not methodology.”

“Market researchers must take ownership of their recommendations,” said another member of the audience. “Never start a conversation with ‘it depends’ - always start with ‘I think’ or ‘I believe’. We must lose our invisibility and take responsibility; we must have the courage to speak up when the wrong conclusions are being drawn from the data. It is our responsibility to ensure that the company draws the right conclusions from the data.”

“Many market researchers are already acting as internal consultants and experts but the challenge is getting others to value us,” was the opinion of another attendee. “Senior managers buy-in is vitally important but we need to sell our value to them.”

Another opinion from the floor was: “We must make market research sexy! Top people with the right skills and the right personality are not choosing market research so how do we attract them?”

On this point, Thomas Hein stresses the virtuous circle. “The better market research is regarded within a business the more visibility it has with the brand team. The more market researchers demonstrate their skills and their value, then more people will want to come and build a career in market research.”

interim members meeting report

7 february 2012, brussels



Mid level researchers get their own session

Responding to feedback, for the first time, mid-level researchers were invited to take part in the Interim Members Meeting, with a dedicated programme developed to meet their particular needs. The idea proved popular and more than 25 researchers attended from a range of companies.

The programme included an overview of EphMRA activities, a talk about the skill sets needed to develop a career in market research, and presentations on market access and insights. The dedicated stream also gave attendees the opportunity to hone their networking skills and the freedom to ask questions and discuss issues without more senior-level researchers present.

Opening the day was a brief overview of EphMRA's activities, during which the mid-levelers generated some excellent feedback on what information they needed and how they wanted it delivered, including great ideas such as You Tube-style videos and online forums.

After this, there was a presentation about competencies and skill sets needed to develop their market research careers, followed by two more presentations designed to help attendees bolster their knowledge and skill set, focusing on market access and developing insight from data.

“The meeting had a great structure and I liked the future-looking topic, plus there was clear goal-setting which I thought was very helpful”

Positive feedback

At the end of the meeting, feedback from both mid-level and senior researchers was very positive. “The meeting had a great structure and I liked the future-looking topic, plus there was clear goal-setting which I thought was very helpful,” said one Full Member. “We are definitely moving in the right direction.” A second Full Member said: “The meeting has reinvigorated my faith in the talent at the top of our industry. I also like that the mid-level researchers were included; we have to engage with younger people to ensure we maintain that level of talent.”

Feedback was also extremely positive on the mid-level side. “The best way to learn is to speak to other people who are facing the same challenges and problems, and we had plenty of chance to do that at the meeting,” said one mid-level researcher. “The IMM was also a great networking opportunity.”

interim members meeting report

7 february 2012, brussels

Mid level group update

EphMRA has appointed 2 leaders of the Mid level Group:

Nik Ellis, Research Manager, Ipsos Healthcare and Jennifer Curtis, Associate Consultant of ZS Associates. We are looking for a 3rd co-leader of the Mid Level group and so hope a colleague from a pharma company can join us. Interested?

A kick off call was held with Nik and Jennifer to outline some objectives for the group and these are being worked on right now. They will be shared with the entire mid level group when completed.

Of course the IMM 2013 will be the forum to meet face to face again so make sure this date is in your diary once announced. However we will be planning other points of contacts before then including webinars - the programme and content to be lead by the Group.



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.



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 focus on Sweden, Germany and the United Arab Emirates...

Sweden, defined by **order** and 'lagom'

Sweden is a comparatively small market in Europe with a population of 9.4 million. Like many other countries, Sweden is struggling with an ageing population and an increased pressure to cut costs in the healthcare sector.

There are no figures as to how large the healthcare market research sector is in Sweden. An ESOMAR report states that Sweden comes second after the UK in terms of spend per capita on market research in general.

The drug expenditure is comparatively high per capita and amounted to approximately 9% of GDP in 2011. This number has been fairly stable since the early 80s. In the 1990s, the Swedish pharmaceutical industry was very strong. This has shifted and more and more employees have been made redundant as whole research departments and production plants have closed down. There is an on-going political discussion concerning what Sweden can do in order to prevent this from happening and how the pharmaceutical industry can be promoted.

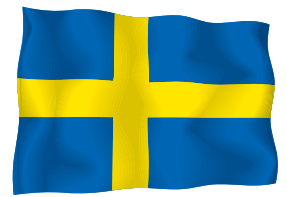
Two concepts define Sweden: order and 'lagom'. The latter is the concept of moderation and is highly influencing of Swedish life. It is, for example, reflected in the political landscape and the successful balance between capitalism and social conscience that is prevalent. From a healthcare perspective, this means that Sweden has been known to the rest of the world to offer a high quality and equitable healthcare system funded by tax.

Swedes like order too. An example for us market researchers is the guidelines that the Swedish Association of the Pharmaceutical Industry (LIF) has published. Amongst other things, these guidelines state that incentives are capped and that market research should take place outside of the physicians' working hours. If a higher incentive needs to be offered due to the type and length of research - the project would not be considered market research anymore but consultation and the physician would need approval to participate from their employer.

Swedes are very technically savvy. The internet penetration in Sweden is very high thus online approaches do not cause any specific issues. Webcam focus groups have turned out to be a success as this is sometimes the only way that a focus group with a small universe of physicians treating a specific condition can be realised in this geographically dispersed market.

Sweden has a history of state-owned monopolies. The pharmacy market was deregulated in 2009 and nowadays it is also possible to buy some OTC products in supermarkets and gas stations. The other main monopoly that still exists in Sweden is the 'systembolaget' or off license. Interestingly however, this has not negatively impacted on the ranking based on democracy Sweden is ranked after Norway, Iceland and Denmark as the fourth most democratic country in the world, according to the democracy index published by the Economist.

...Sweden



By Elsa Andersson

Qualitative Research Manager
QQFS AB Sweden

Webcam focus groups have turned out to be a success as this is sometimes the only way that a focus group with a small universe of physicians treating a specific condition can be realised in this geographically dispersed market.

... United Arab Emirates



By Stuart Crocker

Managing Director
42 market research

Away from the glitz and glamour, the UAE healthcare market is still a work in progress to become a stand-alone market of interest, instead of being combined with all of the other Middle East countries

United Arab Emirates, the biggest and best **of everything you could ever want**

From the world's tallest tower - the Burj Khalifa - to the grandiose shopping malls and 5+ star hotels, the construction of the Palm and the world's largest indoor theme park, the seven different emirates that make up the UAE have set the country on a course to develop the biggest and best of everything that you could want.

That goal, naturally, also extends to its healthcare ambitions, through the development of specialised healthcare 'cities' which are integral to its plans on becoming a global hub for medical tourists who are seeking high quality procedures and treatments from the world's best international physicians.

The UAE greatly benefits from its location as an international transportation hub, with easy access to the rest of the Middle East, Asia and Africa as well as Europe. When combined with the quality of lifestyle that the country can offer, the lure of tax-free living and the infrastructure already in place, it is easy to understand why the UAE is attracting pharmaceutical and market research companies to set-up offices in the country to coordinate their regional and international activities.

However, away from all of the glitz and glamour, the reality is that the healthcare market in the UAE is still a work in progress towards becoming a country of interest on its own, as opposed to being combined with all of the other Middle East countries. Any market research that is currently undertaken, must consider various elements that can lead to difficulties in capturing a representative snap-shot of the market.

The population of the UAE is a mixture of people from many different countries and cultures and, internally, the level of healthcare options available varies not only by emirate but also within the population itself. The native Emirati's represent only a small percentage of the population and a proportion of these will travel abroad for their treatments - contradictory to the long-term aims of the UAE of having people receive their treatments here. The remainder of the population comprises expatriates from all over the world whose employment packages vary considerably, meaning that they may not be able to afford the treatments in the UAE or alternatively may also still prefer to travel home for their treatments. So, although the healthcare foundations are in place, compared to other countries of similar population size, the size of the pharmaceutical market is still small, and so there has been little requirement up until now for market research.

However, the healthcare situation is changing rapidly: the country is introducing mandatory medical insurance; it is actively promoting amongst its residents to obtain their treatments locally; it is encouraging healthcare tourists to seek their treatments here as well as inviting top international hospitals and doctors to be based here.

The UAE is on its way towards becoming a global healthcare hub, and as this development continues, this will lead to growth in the healthcare sector, which is an opportunity for both pharmaceutical and market research companies to benefit through the resulting rise in demand.

Germany, adapting to **changes and challenges**

Markets are subject to constant change that must continually be adapted and reinvented. There are a number of challenges in the German healthcare system which have an effect on pharmaceutical market research.

Legal compliance issues have made it increasingly difficult for market research companies to conduct interviews as entry requirements such as 'employer approval' in hospitals must be fulfilled. These bureaucratic hurdles not only provoke longer fieldwork times but also have an effect on validity/quality of the market research. As in any other country, the pharmaceutical industry in Germany must also comply with regulatory authorities, and must report all side-effects of pharmaceutical products (AE-reporting).

Increasing concentration, i.e. the consolidation that has been taking place among hospitals for some years, now resulting in so-called 'hospital chains', mean that the individual responsible for the chain therefore makes decisions which have an impact on a larger number of facilities; thereby fortifying his/her market power. Ever more frequently, the decision is made to prohibit market research within the network, whereby accessibility and execution of interviews among hospital physicians becomes increasingly difficult. Besides the challenges faced in the hospital sector, it will be more difficult to conduct market research in the area of homes for the elderly and physician practices as well.

An important new development in healthcare, which many pharmaceutical manufacturers cite as being **the barrier toward market access**, is the benefit evaluation of pharmaceutical products in accordance with AMNOG (regulation of pharmaceutical products law). Market access for innovative products is therefore made more difficult.

Thus, the market for pharmaceutical market research, which currently makes up 14% of the total turnover among ADM-members (€245 million in 2010), will remain flat. In order to successfully conduct pharmaceutical market research in Germany, it is essential to take note of these changes in a timely manner and identify the opportunities.

...Germany



By Peter Eichhorn

Managing Director, Consumer Experiences
GfK SE

The market for pharmaceutical market research, which currently makes up 14% of the total turnover among ADM-members (€245 million in 2010), will remain flat

Latest Headline...



It's been a busy few weeks for the EphMRA Ethics group. It has been analysing member feedback on changing the Code's status, updating and extending the code to new markets and ensuring that the market research community's voice is heard as the European Medicines Agency defines new legislative implementation rules for adverse event reporting. News on all these activities plus important updates on employer permission for market research in Germany and recruitment of patients for market research by patient associations in France are all provided next.

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

As you will no doubt be aware, the EphMRA Ethics Group and the EphMRA Executive Board have recommended a move to mandate the EphMRA Code of Conduct.

The member consultation on mandating the Code of Conduct closed at the end of January 2012. Thank you to all those that provided input - we appreciated the many thoughtful responses. Analysis of member feedback shows that overall views are positive; however, some very specific and valid concerns were raised in terms of how the change would fit with Members' own internal codes and what the legal implications of such a move might be.

See The Board Report featured on page 4 for next steps.

Code of Conduct **2012 Developments**

The Code will be updated in Quarter 2 this year and extended to hopefully include:

- Japan
- Poland
- Russia
- Turkey

New EU Pharmacovigilance Legislation & **Adverse Event Reporting**

As you are probably aware, in July 2012, new EU pharmacovigilance legislation comes into effect that will impact on adverse event reporting (AER). The European Medicines Agency (EMA) is currently defining the 'legislative implementing rules' that will impact on AER from a market research perspective.

The EMA invited stakeholders to enter into a dialogue in order to draft the rules detailing how the legislation will be implemented. Accordingly EphMRA - in consultation with members - submitted its response in November 2011. All responses were published in February along with an EMA summary; however, there was no direct reference to market research within this report. The EMA have recently released the first batch of modules on good pharmacovigilance practices for public consultation. EphMRA is examining these and is following up with the EMA to ensure its voice is heard.

Code of Conduct Training

A total of 382 members applied to take the Code of Conduct **Competency Test** in the last year, acquiring certification, and a further 171 completed the **online training** module.

If you wish to join these growing ranks, the training and the competency test are both available **free of charge** on the website.

Full and associate members are taking advantage of EphMRA's flexible approach to training and have commissioned **tailored in-house Code of Conduct training workshops and webinars**. In February, an in-house Code of Conduct training workshop was carried out for an Associate Member company and a Full Member training webinar examining the Code of Conduct for Medical Personnel Reviewing Market Research was held in April.

If your team/company would like to talk to us about an in-house Code training initiative please contact Bernadette Rogers at generalsecretary@ephmra.org.

Code Enquiries: Code enquiries are continuing to come in regularly - every week, covering a wide range of topics. If you have any questions on the EphMRA Code of Conduct, the Code Query service is available on the website for all EphMRA members.

The 'What's New?' Workshop: 13.30-17.30, 19 June 2012, Paris

Finally, don't forget the next face-to-face Code of Conduct training opportunity!

EphMRA will be holding a half-day workshop immediately before the Annual Members Meeting and 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.
- 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.

The workshop is ideal for healthcare market research professionals, both company and agency, who commission, manage and execute market research; it will be led by EphMRA's Ethics Consultant, Catherine Ayland along with a PRM&T Committee representative.

Booking is already well underway. There are a limited number of places, so book soon to avoid disappointment. Registration is now open online at www.ephmra.org.



Other Ethics News...

Update on Employer Permission for Market Research in Germany

Recently, concerns have been raised that new rules have come into effect in Germany which would require hospital physicians recruited for market research to obtain the written permission of their employer/superior to participate - referred to as Diensttherrengenehmigung - this is not the case.

EphMRA has investigated this with the German market research associations - the ADM (Arbeitskreis Deutscher Markt- und Sozialforschungsinstitute e.V.) and the BVM (Berufsverband Deutscher Markt- und Sozialforscher e.V.). **The ADM and the BVM have both recently re-confirmed that from their point of view there is no requirement for a Diensttherrengenehmigung for market research**, assuming the market research guarantees anonymity for respondents and the interviews preferably take place outside of physician's working hours and at a place that is not their employer's premises.

The concerns may have arisen as a result of the ADM and BVM currently revising their 'Guideline on Interviewing Physicians for Market and Social Research Purposes' (due to be completed in autumn 2012). The ADM has informed EphMRA that it does not expect a significant change of the professional rules regarding the Diensttherrengenehmigung.

Clarification of Recruitment of Patients by Patient Associations in France for Market Research

Article 84 of the HPST law* states that direct contact between a sufferer contacted through a patient association and a company developing or marketing a medicine is forbidden. This is understood to include direct contact between sufferers identified through a patient association and any representative of a pharmaceutical company such as a recruitment or market research agency. This law applies to all state-approved patient associations. Consequently patient associations must not be approached for patient recruitment in France.

*The Law of the French Public Health Code, article 84, clause VI entitled 'Therapeutic education of the patient'

Pharmaceutical Market Europe April edition page 38

'Transforming Market Research' is the EphMRA article in PME last month - digital version available at www.pmlive.com/pme

Co-authored with Dr Thomas Hein, Bayer Healthcare the article highlights and summarises what your colleagues were discussing at the recent EphMRA IMM in Brussels - how market researchers must become internal consultants who dispense insight to survive.

It's a must read for all in our industry!





Foundation Committee

The EphMRA Foundation Committee: “funds and supports original projects in the international healthcare market research and business intelligence fields to raise the standards of knowledge and best practice amongst members”. For details of previous Foundation projects, EphMRA members can visit:

<http://www.ephmra.org/default.aspx?page=29&ReturnUrl=%2fpublications--resources%2ffoundation-projects1.aspx>

Please remember that all EphMRA Foundation projects are funded (entirely or in part) by, and belong to, EphMRA members. The materials, reports and intellectual rights resulting from Foundation projects cannot be used by other parties without formal permission from EphMRA.

If you would like to share all or part of a Foundation publication, please ensure that all recipients are current EphMRA members and that the EphMRA Foundation is clearly referenced. If in any doubt, please seek formal confirmation from EphMRA before sharing the projects.

Current Foundation Committee members

The Foundation Committee consists of a mix of pharma company and agency members, along with a member from academia to provide specialised input and academic rigour. We also have a new position of Asia Region Representative, to reflect the increasing importance of this region in the activities of EphMRA and our members.

The Foundation currently consists of:

Pharmaceutical company members	Christin Firchau (Pfizer) Felicina Itote (Abbott) Su Meddis (AstraZeneca)
Market research agency members	Angela Duffy (The Research Partnership) Jessica Santos (Kantar Health) Steve Kretschmer (IPSOS Turkey)
Academic member	Prof. Philip Stern (Loughborough University, UK)
Asia Region representative	Stephen Potts (Kantar Health)
Committee Chair	Sally Birchall (EphMRA Foundation Chair)

Current Foundation Projects

From a long list of topic ideas for future Foundation projects generated this year, the Foundation Committee is funding three active projects:

1. Market Research and Adverse Event Reporting (EU5 and USA)

New EMA legislation implementation guidelines will be published later this year and EphMRA expects a need to revise our own AE Reporting guidelines as a result. This project is designed to support the EphMRA Ethics Group in revising the guidelines and in any subsequent discussions regarding implementation with the EMA over the coming months. The project is being conducted amongst physicians, pharmacovigilance professionals and market researchers to explore the value of AE reporting via market research and the impact of AER requirements on healthcare market research.



2. Country Capsules

The EphMRA Foundation is developing “cheat sheets” for conducting research in specified markets. They contain a summary of the healthcare environment and practical market research “hints and tips” for successful research in each country. Based on feedback from the mid-level researchers at the IMM in February, we hope that this project will be of particular interest to this section of EphMRA members. The first Country Capsule to be published is Turkey, with other countries following throughout the year. If you have an interest in a particular country, please let the EphMRA Foundation know!

3. International Comparison of Norms for Frequently-Used Scales (BRIC countries)

Market researchers have long suspected that physicians from different countries may respond differently to “standard” questions used in market research surveys. Anecdotal evidence has led us to believe that respondents from some countries may respond more positively/conservatively/ politely/honestly than others. However, it is difficult to establish any “norms” for such responses and therefore interpretation of responses in different countries is limited.

In 2001, a previous EphMRA Foundation project examined cultural differences in responses to commonly-used scales in market research across the main five European markets. The project findings provided valuable insight on how different markets/ cultures respond to the same scales. EphMRA members can view this project in the Archive section (Foundation Committee - web site).

Researchers need to understand not only how responses to standard market research questions differ in different countries but, in practical terms, how we should be interpreting these country-specific responses within international studies.

This Foundation project will identify “norms” in response to scales across the BRIC countries and provide practical recommendations on “normalising” the scale response across countries.

For any further information about the EphMRA Foundation and its activities, or to suggest a potential Foundation project, please contact any committee member or the Foundation Chair (foundationchair@ephmra.org). We are at your disposal!

PRM&T Committee



It's been a busy quarter for the PRM&T Committee and I am delighted to announce that the EphMRA Training Plan Update for 2012 is now available. You can choose the best training format for your organisation. A copy is available at: <http://www.ephmra.org/whats-new/training-programme-launched.aspx>.

In response to member feedback, industry challenges and continuing pressure on training budgets, we have updated our Training Plan to create more opportunities than ever to meet organisations' training needs. We have retained the flexibility of our programme with opportunities to train face-to-face, on-line or in-house but have broadened our offering to include more conference-based Masterclasses - with four different topics on the agenda in Paris.

We have also provided the opportunity to discuss hot industry topics via Webinar this year. By the time you read this newsletter, we will have already discussed the core skills and competencies required for an evolving world of market research in April. Later this year, we will be discussing optimising insights from digital channels in July and also adherence and how insight steers programme development in October.

Registration is on a first come first served basis as numbers are limited. They are complimentary to members - one senior manager per Associate Member company can register but there is no restriction for Full pharma members. Connection will be via web ex and telecon which will be provided when registration is confirmed. To book your place, please go to Events at: <http://www.ephmra.org/events.aspx>.

To discuss in-house training for your organisation or any other aspect of EphMRA's Training Plan, just contact Sandra McAuliffe at prmtchair@ephmra.org or Bernadette Rogers at generalsecretary@ephmra.org.

A new member for the committee

Please join me in welcoming Shabeer Amirali to the committee. Shabeer is the Senior Global CNS Customer Insights Manager at UCB. He has been an active member of the EphMRA Task Force on AER, looking at the new EMA legislation and its impact.

More members still needed

We are actively recruiting more Full Pharma Members to the PRM&T Committee. If you have 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 then we would like to hear from you. As the world of market research evolves in response to continual change, so must our training programmes. Be part of the team that helps shape best practice and join the PRM&T Committee. Please contact Sandra McAuliffe at prmtchair@ephmra.org or Bernadette Rogers at generalsecretary@ephmra.org for more information.



Shabeer Amirali

Syndicated Data Committee

Launch of a LinkedIn Forum



The main focus of activity for the Syndicated Data Committee (SDC) in the last few weeks has been the launch of a LinkedIn Forum. Established in March, the purpose of the Forum is to enable Full members (Pharma companies) to raise questions, share experiences and have input to SDC activities. The forum is to be an informal and friendly environment, providing an opportunity for people working in the area of syndicated data to chat, ask questions and post comments on topics of their choice. The Committee will keep an eye on topics raised and where appropriate, incorporate the information into future planning. We will also use it as a vehicle for gathering feedback on key topics throughout the year.

We feel that the LinkedIn Forum enables those people working in a similar area to share thoughts and ideas and ask questions - creating an opportunity to bring together the syndicated data community.

If you are interested in joining the group on LinkedIn, Find EphMRA on LinkedIn - <http://www.linkedin.com/> - search in Groups for 'syndicated data' and request to join. You are just a few clicks away from joining a great new group.

New Form Code Committee

At the time of going to print we can let you know that most of the NFC changes and reclassifications occur in the second half of the year and so preparation for the next meeting is underway. We will begin summarising the activities and output related to these over the next few weeks.

The Committee membership is mainly unchanged except that Ms Van Tang has left BD France and will no longer be involved. Fortunately, Aline Abravanel, of BD France will continue and participate in the next Committee meeting in Paris.

Classification Committee

April 2012 Meeting - London

Our first meeting of the year was held in Central London in early April and we were made very welcome at the Takeda offices by Emma Yeung and Giulia Chan. The main focus of the meeting was on the new class structure proposals that, if approved, will come into effect next year. The Committee were very pleased to welcome two EphMRA member pharma companies to the meeting who presented their views on these proposals; this approach was very useful and an efficient way of obtaining first-hand knowledge of company's opinions.



Proposals for New Classes for 2013

The Classification Committee is busy preparing the proposals for changes to the Classification System that full members will vote on in May 2012. All pharmaceutical corporations that are full members of either EphMRA or PBIRG are entitled to a vote. If approved, the new classes will be implemented at the beginning of 2013. Three proposals are being discussed for voting at this time; these are the factor Xa inhibitors, drugs used in constipation, and anti-parathyroid agents.

Committee Membership

Many thanks to a previous Committee member, Robert Verspagen, who left earlier in the year, and welcome to Marilena Lauriola from MSD Italy who has just joined. We have further vacancies on the Committee and we would be very pleased to receive enquiries from people who wish to shape how the classification is developed. Please contact Bernadette Rogers (generalsecretary@ephmra.org) or one of the Committee members (listed on www.ephmra.org) for further details.

Data & Systems Committee



The Committee is currently discussing with IMS their current Third Party Agreement Process and whether it is possible to make it quicker and faster, possibly automatic and more compatible with clients' needs in term of reactivity.



Local Chapter Meeting - Italy - Milan

'Cogli la sfida: presente e futuro, nuove regole e nuove metodologie'

5 July 2012

Beijing - second Asia Conference - 'Turning Challenge into Opportunity'

25-27 September 2012

Local Chapter Meeting - Poland - Warsaw - 'Focus on CEE'

7 November 2012

2013 Annual Conference - London

25-27 June 2013

'Cogli la sfida: presente e futuro, nuove regole e nuove metodologie'
Milan, Italy - 5 July 2012

Venue: 10 WATT, via Watt 10, 20143 Milan, Italy.

Meeting Timing: 14.30 - 20.00 hrs

Meeting focus: Italy

Italy Chapter Group

The leaders of the Italy Chapter are:

- **Piergiorgio Rossi** - SGR International, also an Associate Member of the Executive Board
- **Elena Ripamonti** - elma research
- **Viviana Zecchini** - AstraZeneca
- **Maria Maddalena Lauriola** - MSD

'Focus on CEE' - Regional Meeting
Warsaw, Poland - 7 November 2012

Venue: Warsaw Marriot. Al. Jerozolimskie 65/79, Warsaw, 00-69, Poland

Meeting Timing: 09.00 - 15.30 hrs.

Meeting focus: The meeting is aimed at those based in the region, and those outside the region whose remit covers CEE.

The programme will focus on countries which include: Russia, Poland, Czech Republic, Hungary, Ukraine.

These meetings are open to both EphMRA member and non member companies with no anticipated restriction on numbers. Registration is on a first come first served basis.

Non Member companies are invited to attend this first meeting in order to be able to get an insight into EphMRA member offerings and benefits. Subsequent meetings will only be open to members and so we hope non members will then join.

Local Chapter Meetings

conference 2012 - key highlights

19-21 june, paris, france

Wednesday 20 June 2012

10.15	Agency to Agency Supplier Meeting This is a session intended for fieldwork suppliers and freelancers to network with full service agencies in a business setting. It is not intended to replace any aspect of the Agency Fair but to provide an opportunity for supplier meetings. Full Service Agencies - this is your opportunity to meet and engage with those supplying fieldwork and or freelance services and so all full service agencies are encouraged to attend.	
11.40 12.15		AGM Annual General Meeting - for Full Members Only
12.20 - 14.05	Lunch and Agency Fair	
14.10 - 14.20	Plenary Session - Welcome and Opening of Conference - James Rienow, Pfizer and Sarah Phillips, Incite - both Executive Board Members	
14.25 - 14.55	Power Discussion Part 1 - How will the future role of the prescribing physician impact on market research Throughout Europe, the role of the physician is changing and will continue to change still further, largely due to payment systems which are evolving all the time. So, the key question is - will the physician still be an important player in prescribing decisions in the future? The answer will have huge impact on pharmaceutical market research and is therefore worthy of a 'power discussion' amongst experts in this field. Part 1 of this engaging discussion will feature the health economic viewpoint on this subject and will be given by Lieven Annemans - Professor of Health Economics and Pharmacoepidemiology at the Medical Faculty of Ghent University, Ghent, Belgium and at the Medical faculty of Brussels University (VUB). Lieven is a highly respected expert in his field, having worked on health economic evaluations in 20 different countries, involving a diverse range of therapeutic areas. He will kick off this discussion, which will continue on Thursday with other eminent speakers from Pharma, Payer and agency perspectives. The audience will be invited to join in this important discussion on both days. Both sessions are 'must see', so don't miss both parts!	Lieven Annemans 
14.55 - 15.30	Plenary - Alex Butler, The Social Moon Former EMEA Marketing Communications Manager, EMEA Strategic Marketing at Johnson & Johnson Pharmaceuticals Game changes - information in a digital world With the increase in patient power, the relationship between patient and physician is changing - fuelled by spiralling patient access to social media. High quality research data has been challenged by online longitudinal studies, so how can pharmaceutical companies make sense of this patient reported information and outcomes? Alex will provide delegates with the answers! <i>Chair: Chris Krattiger, Managing Director, GfK Research Matters, Switzerland</i>	Alex Butler 
15.35 - 16.05	Plenary Speaker - Benjamin Sarda , Director of Product Marketing, Orange Healthcare New technologies and the transformation of the healthcare ecosystem: prospective futures for pharmaceutical market research. Over recent years the drug discovery pipeline has been a concern for many in the pharmaceutical industry. Escalating costs, increasing complexity and a dwindling population of drug candidates suggest that traditional R&D methods are unlikely to produce enough breakthrough drugs to ensure industry growth. The convergence of information and bio-technologies is already revolutionising drug discovery and design, and may radically alter the economics of the drug discovery over the coming years. The pharmaceutical industry, however, is not only about drug discover, and opportunities for cost reduction and innovation are to be found along the entire pharmaceutical value chain, from the operation and management of clinical trials to the marketing and distribution of pharmaceuticals. During this session, Benjamin Sarda, Director of Product Marketing of Orange Healthcare, will present some possible, future outcomes and the impacts of the ITC revolution along the pharmaceutical industry value chain. <i>Chair: Martin Schlaeppli, Director, Praxis Research & Consulting, UK</i>	Benjamin Sarda 

conference 2012 - key highlights

19-21 june, paris, france

16.10 - 16.40

Coffee

16.40 - 17.10

Parallel Sessions

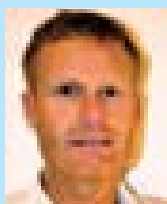
Parallel Session 1

Out of the Dragons' Den came forth Crowd Sourcing Success

Kim Hughes, Managing Director, The Planning Shop International, UK and **Klaus Christensen**, Market Analyst, AstraZeneca, Sweden



Kim Hughes



Klaus Christensen

Chair: Trevor Acreman, Head of Healthcare Europe, Millward Brown, UK

AstraZeneca was looking for innovation and so ran an internal Dragons' Den for sponsoring new ideas falling outside of business as usual activities.

One specific use was initially chosen to be tested - the use of crowd sourcing to identify patient types for a new product.

This paper will discuss the Dragons Den concept and the process for selection. We will then give some background to crowd sourcing, demonstrating success in other markets with a range from gold mining to toothpaste manufacture.

We will discuss different definitions of crowds and access to crowds in pharmaceuticals including legalities such as AE compliance and awarding prizes rather than paying incentives etc.

Most importantly, the paper will feature the results from two case histories, which Klaus Christensen from AZ will talk about.

Key findings will show that the crowd were able to generate between 15 and 30 patient types, which clinicians regarded as **more suitable** than the initial 5 patient types the client had developed for the product profile.

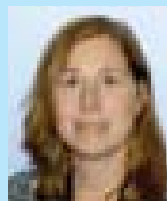
Parallel Session 2

"After the idea, there is plenty of time to learn the technology" (James Dyson).
How can Pharma, Physicians and Market Researchers harness great ideas for better patient care, better access to information and better research?

Alex West, Managing Director and **Emma Middleton**, Account Director, PSL Research, UK



Alex West



Emma Middleton

Chair: Chris Krattiger, Managing Director, GfK Research Matters, Switzerland

This paper will take a 360 degree approach to examine how technology is being used in healthcare and healthcare research today and the implications for market researchers:

- How Pharma is using technology to provide better care for patients and better physician information.
- How Physicians themselves are using technology in their daily practice.
- What technology is being used by the market research industry? What are the strengths of the technologies being deployed? What are their limitations?
- Where do we go in the future? What technologies hold the greatest potential?



conference 2012 - key highlights

19-21 june, paris, france

17.15 - 18.00

Associate Members Meeting - All Associate Members are invited to join this meeting.

18.30

Bus transfer from Pullman to Pavillons de Bercy.

19.00 - 20.00

Cocktail

20.00 - 21.30

Dinner

21.30

Buses will leave for the Pavillons de Bercy for a one hour Paris by Night Bateau Mouche boat Tour on the Seine or return back to the Pullman Hotel. For those returning to the hotel, you will be provided with a voucher for the hotel bar valid for this evening only.

22.00 - 23.00

Scenic tour accompanied by refreshments.

23.00 - 23.30

Buses will leave to return to the Pullman Hotel.

conference 2012 - key highlights

19-21 june, paris, france

Thursday 21 June 2012

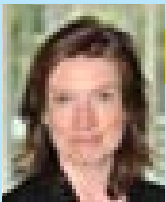
09.00 - 09.30

Parallel Sessions

Parallel Session 3

Where did I leave my car keys?

Sarah Phillips, Incite, UK



Sarah Phillips

Chair: Dorothy Parker, Managing Director, fast forward research, UK

This paper will focus on different types of 'forgetting' and how it relates to mal-adherence. It is important to start by defining mal-adherence, which the paper will outline, referring to all instances of where patients do not follow the advice of their physician. This is estimated to be around 50% of cases. Having some impact on these rates will make a significant difference for patient outcomes and drug budgets. It is therefore a critical issue for companies to understand and address.

Parallel Session 4

Getting It Right: How To Measure, Manage and Leverage Customer Loyalty to Improve Your Business

Thomas Hartley, Ph.D., Vice President, Customer Loyalty, GfK, USA and **Peter Küster**, Senior Research Consultant, GfK, Germany



Thomas Hartley



Peter Küster

Chair: Alex West, Managing Director, PSL Research, UK

Customer Loyalty and Customer Engagement research has been adopted by several pharmaceutical companies over the past 5 years. Senior market research professionals from GfK will present approaches and case studies of customer engagement research in pharmaceuticals that include frameworks that are optimized for large markets (USA) and mid-sized markets (European countries). Topics will address levels at which customer loyalty should be measured, how to use the results to stimulate improvements in your organization, and how to demonstrate Return on Investment (ROI). Each topic will be supported by actual case studies and data, including quantitative analysis of the impact of customer loyalty/engagement on prescriptions written.

09.35 - 10.05

Parallel Sessions

Parallel Session 5

"Prescribing rationale" – market research via iPhone App

John Branston, Director, The Research Partnership, UK and **Martin Lange**, Associate Director Global Business Intelligence - Oncology, Merck Serono

Chair: Sarah Phillips, Incite, UK

Parallel Session 6

Managing uncertainty in the forecast of the uptake of branded generics, biosimilars and targeted medicine

John Ashraf, Senior Methodologist and **Dirk Huisman**, Chairman, SKIM, The Netherlands

Chair: Martin Schlaeppi, Director, Praxis Research & Consulting, UK

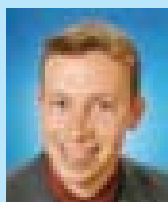
conference 2012 - key highlights

19-21 june, paris, france

Parallel Session 5 (continues)



John Branston



Martin Lange

This paper seeks to explore the potential of smartphone-based applications ("Apps") to provide a platform for succinct, immediate, detailed qualitative insight into physicians' prescription rationale at the moment of prescription. We would experimentally employ this technology to demonstrate the feasibility of this idea, and to use it as a basis for thoughts on how it might be expanded in terms of question scope, coverage of different physician settings and also in terms of its provision of trackable data.

Parallel Session 6 (continues)



John Ashraf



Dirk Huisman

The presentation will focus on practical learnings from various studies conducted to forecast the uptake of branded generics, biosimilars and targeted medicine, taking into account different levels of uncertainty between developed and emerging markets. The presentation will give the audience a better understanding of the uncertainty associated with forecasting the uptake of these products in these markets, how to apply Monte Carlo to produce range forecasts in uncertain conditions, and how to deal with uncertainty and range estimates when making business recommendations.

10.05 - 11.05

Coffee and Poster Session with Authors, including 2 posters presented by Young Professionals

Poster 1: 10.20 - 10.30. Poster 2: 10.35 - 10.45. Poster 3 - 10.50 - 11.00

Sessions Chairs: Vivienne Law, Multi Local Research Director, Adelphi, UK; Dorothy Parker, Managing Director, fast forward research, UK and Hilary Worton, Group Head, Ipsos Healthcare, UK

11.10 - 11.50

Plenary - Andrew Spong, STweM - social business development/health communications consultant

**Emerging from behind the velvet rope:
pharmaceutical market research and the
changing expectations of healthcare professionals**

What activities should pharmaceutical market researchers be incorporating into their workflows in order to develop the sort of presences on the social web that both credential them professionally and build trust among subjects with whom they would like to work in the future?

Chair: Hilary Worton, Group Head, Ipsos Healthcare, UK

Andrew Spong



11.55 - 12.10

EphMRA Code of Conduct Update

Bob Douglas, Global Head Custom Research, Ipsos Healthcare.
Associate Member of EphMRA Board.

The challenges of developing a global Code of Conduct.

12.15 - 13.45

Lunch and Agency Fair

conference 2012 - key highlights

19-21 june, paris, france

The next 2 papers are from the **Best of ESOMAR Conference Papers** and have been specially selected in conjunction with ESOMAR for presentation in Paris

13.50 - 14.20

Best of ESOMAR Paper

'The Game Experiments'

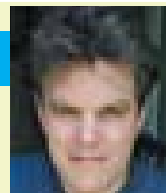
Jon Puleston, VP Innovation, GMI Group and
Deborah Sleep, Founder and Director of Engage Research, UK

Winner of Best Methodological paper at ESOMAR Congress 2011.

This presentation assesses the impact that gamification could have on market research. The concept of "gamification" is sweeping across the marketing communication industry, and is being discussed in marketing departments, advertising agencies and even governments around the globe. We began exploring the idea of game-play in greater depth last year. We examined the theory behind game-play, and looked at how it was being used in other fields, with the aim of discovering how we could integrate this thinking more effectively into our surveys.

Chair: Michael Bendig, Boehringer Ingelheim, Germany, ESOMAR Council Member and Anne Loiselle, Executive Director, EQ Healthcare, Canada

Jon Puleston



Deborah Sleep



14.25 - 14.55

Best of ESOMAR Paper

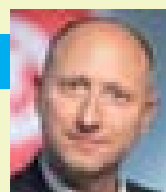
'Coca Cola Europe and the Philosopher's Stone. Crafting a rare win-win-win situation.'

Richard Raubik, Director Knowledge & Insights, Coca Cola Central & Southern Europe, Vienna and
Patricio Pagani, Group Director, Infotoools, New Zealand

Runner-up for Best paper at ESOMAR Congress 2010.

In essence, on realisation that only 20% of their Brand Tracker information was used across all 32 European markets Coca-Cola Europe started searching for the Philosopher's stone. Their journey went through the difficulties of negotiating a positive business case for each market, managing the trend break challenges and ultimately defining a consistent, harmonised tracking study that was relevant for Local markets as well as Regional and Global Units.

Richard Raubik



Patricio Pagani



15.00 - 15.20

Coffee

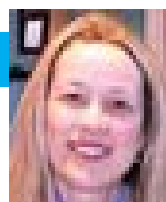
15.25 - 16.35

Power Discussion Part 2 - How will the future role of the prescribing physician impact on market research

Part 2 of this important discussion will feature the views from other stakeholder perspectives and will build on the views put forward by Lieven Annemans in Part 1 of the debate on Wednesday. This session will provide delegates with the opportunity to engage in an important discussion on this issue with key players in the industry and to draw conclusions as to what the role of physician will be in years to come and how this role will impact on market research.

Sarah Kerr, will put forward the payer perspective on this important subject. Sarah works as a Commissioning Lead Pharmacist in Southampton, Hampshire, Isle of Wight and Portsmouth (SHIP), UK, where she is responsible for medicines management and commissioning high cost drugs. She is a member of the Medicines Evaluation Committee, District Prescribing Committee, Southern Health Foundation Trust Medicines Committee and South Central Cancer Drug and Therapeutics Committee.

Sarah Kerr



Christophe Van der Linden from suAzio Consulting, Belgium, will discuss this issue from an agency point of view, drawing on some insights gained from international research with HCPs, payers and other stakeholders.

This session is not to be missed!

16.40 - 16.50

Conference Closing - 2013 Conference Announcement

16.50 - 17.30

Networking Cocktail

thank you to the 2012 conference sponsors

EphMRA wishes to thank the 2012 Conference Sponsors for their generous support:

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Pierre Pigeon, CEO, A+A

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We are market researchers with strategic brand planning, as well as client-side marketing and market research experience

Kim Hughes, Managing Director
The Planning Shop international

Ipsos Healthcare
Sole Sponsor: Conference Delegate List



Ipsos is delighted to support EphMRA as the voice of the pharma and healthcare industry.

Bob Douglas
Ipsos Healthcare

Data Intelligence
Sole Sponsor: Delegate Badge Holder

Data Intelligence specialises in sales and marketing software solutions and services for the pharma industry.



Our goal is to remove the pain from using pharma business information.

Mike Askew, Director, Data Intelligence Ltd.

SGR International
Sole Sponsor: Conference Pad

SGR look at EphMRA as a Big Community, and we believe in it! We traditionally take the opportunity to sponsor at the AGM not only because this gives us a very good visibility, but also because we truly believe in EphMRA and want to support its initiatives as much as possible.



Piergiorgio Rossi, Managing Director, SGR International

IMS Health
Sole Sponsor: Post Conference News



IMS and EphMRA go back more than 50 years. In the current dynamic times it is critical we stay the course, whilst adapting to new market realities. IMS is proud to continue to sponsor EphMRA with support and market intelligence to aid its members to the best of our ability dealing with these new dynamics.

Alan Harrison, IMS Health

IMS Health
Sole Sponsor: Guide to the Agency Fair

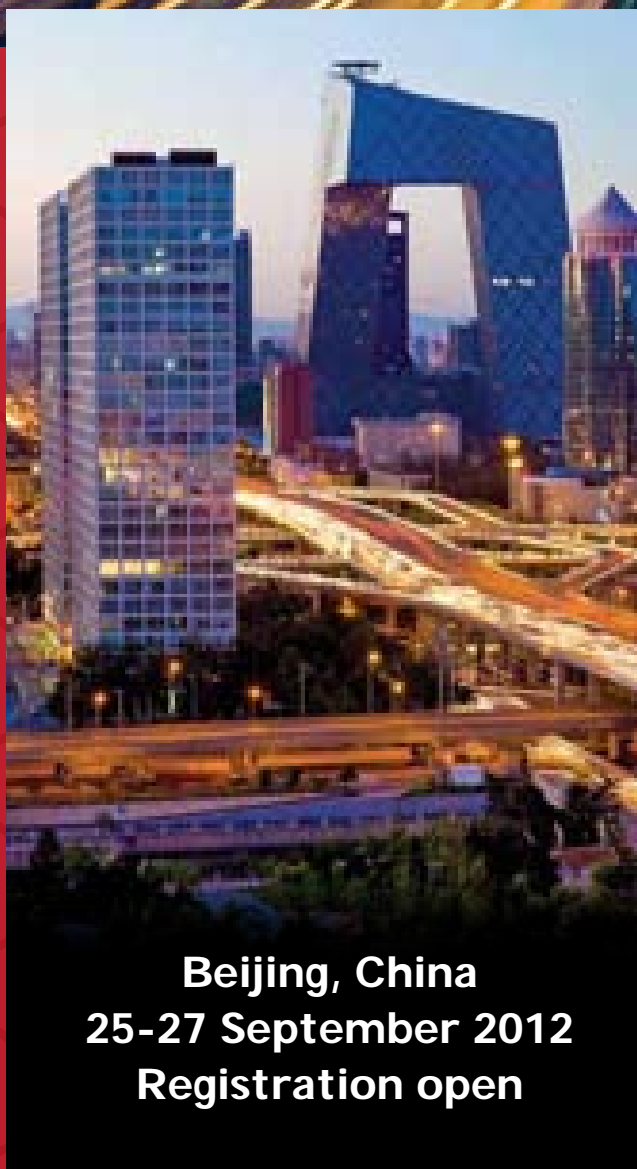


Vitaris Research Consultancy
Sole Sponsor: Coffee Breaks



EphMRA ASIA 2012

Beijing



Turning
challenge
into **opportunity**



**Pharmaceutical
Market Research
Conference in Asia**



**Beijing, China
25-27 September 2012
Registration open**

People News

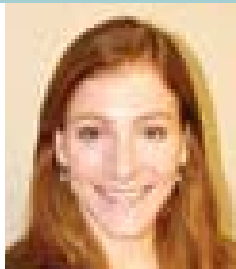
We are glad to announce the appointment of Mira Nikolova as a Qualitative Business Development Manager. Mira will be responsible for client relationship management working with new and existing leads.



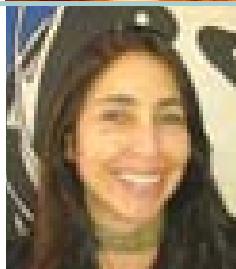
The Research Partnership has appointed Suzanne Griffiths, ex-Wood McKenzie Consultant, as Director (EU) in the London Headquarters. Suzanne's appointment brings global team to 14 international Directors and 70 researchers.



InSites Consulting, have appointed Kristof de Wulf as its new CEO per January 1st. Kristof is Associate professor at Vlerick Management School in Belgium and is Co-founder of InSites.



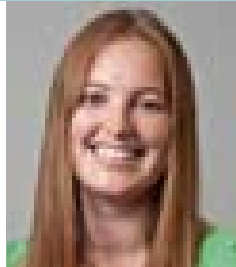
Sian O'Regan's promotion to AD, Gillian Newbold's return from maternity leave and Katy Irving (RM) joining our newly set up London office is just some of the news from HRW!



We proudly announce that Gabriela de Paula is promoted to Executive Director at Demanda Health. Gabriela is the head of Demanda Health since 2003. Join us in congratulating her accomplishments.



Phoenix Healthcare is expanding further with the appointment of Howard Parr as Group Director. Howard has more than 20 years experience gained at GfK, Holden Pearmain, Ziment and Kantar Health.



In a significant move Insight Research Group has appointed Laura Atkinson as a dedicated compliance manager. This reflects Insight's determination to operate ethically within relevant and evolving market research guidelines.





Ugam Research Solutions announces the appointment of Eddie Blindell; Eddie will join the London office Account Management Team, his 16 year career spans Healthcare and B2B, both qualitative and quantitative.



Medimix Europe is pleased to announce the appointment of Anita Agier as Senior Director Global Accounts, working out of its London offices in Aldersgate.



Top of Mind has launched a special online panel of healthcare professionals, pharmacists and nurses (MedVox.ru). Now online healthcare research in Russia becomes quicker, cheaper and smarter.

Services News



Now available, Epiomic™ databases from Black Swan Analysis. An epidemiology tool offering an unparalleled level of patient, co-morbid and attribute details for over 50 diseases. More details at www.epiomic.com.



Kantar Health expands National Health and Wellness Survey into Russia. NHWS provides primary insights from 10,000 Russians on their health status, lifestyle and healthcare attitudes, behaviour and outcomes. <http://bit.ly/GGsPsP>



Enhanced scope of use of iCONSULT Matrix™ (the HCPs' real view of the market): Adapted for niche markets, e.g. oncology. Options for new products, positioning, market expansion. matrix@iCONSULT.de
+49/(0)89/544 241-10

Services News

fastforward offer free training workshops to clients on topics such as NLP, semiotics, online communities. We have recently delivered Advanced Moderating Skills, which our colleagues Sabrina and Joe successfully completed.



Incite announces the launch of the 'Pyramid Principle' in the pharmaceutical sector. This results in research that inspires clients and delivers the most action-oriented presentations in the industry.



The Studio is Millward Brown's unique workshop approach to help clients unlock and inspire big brand ideas. Voices are heard within and outside the organisation (yours and ours). Contact: Healthcare@millwardbrown.com



Elma is pleased to announce that it has been a partner with ONDA (Italian National Observatory for Women's Health) for exclusive ad hoc research since the beginning of 2012.



Intercampus is the first Portuguese company to launch a mystery shopping panel in the pharmaceutical industry, to gather regular information about recommendation of generics.
www.intercampus.pt
master@intercampus.pt





Vitaris Research Consultancy brings together Marketing Sciences and ICM's healthcare research capabilities. We deliver tailored solutions to help our clients make the vital prognosis, contact us at info@vitarisresearch.com

Company News



GfK acquires Bridgehead International, a leading market access consultancy providing national, regional and local payer insights, extending GfK's ability to support clients' market access and pricing needs.



WE'VE MOVED!

Medimix Europe's new headquarters are near St.Paul's and the Museum of London at:

200 Aldersgate

London, EC1A 4HD

Tel: +44 (0) 20 3440 4175

get in touch

If you
have any
enquiries

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

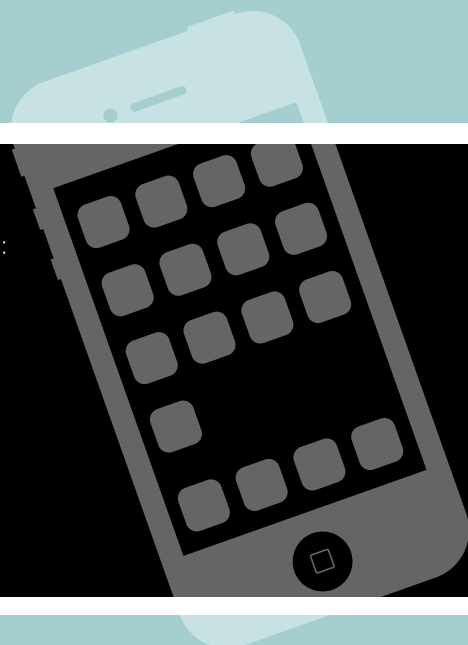
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Who? All EphMRA members - both Full
(client-side) and Associate (agency-side)
- are involved in multinational or national
pharmaceutical market research and / or
business monitoring.

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](http://www.ephmra.org/web-site-advertising-details.aspx).**

Alternatively, just contact

generalsecretary@ephmra.org.

September
News -
Copy deadline

EphMRAnews
September 2012

keeping members informed and involved

July 6th is the deadline for submitting your copy for the **September** News.
Send it to **generalsecretary@ephmra.org**

Other News
Copy Deadlines:

News Published
December 2012
March 2013

Copy Deadline
15th October 2012
15th January 2013

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

EphMRA's Guiding Principle

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.

EphMRA



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