

EphMRA news

keeping members informed and involved

Join us in Amsterdam...



EphMRA Pharmaceutical Market Research Conference 2015

Conference Programme Amsterdam
23-25 June

Beurs Van Berlage, Damrak 243,
1012 ZJ Amsterdam

Registration Fee Deadlines:

Early Bird Fee: 4pm Thursday 5 March

Mid Fee: 4pm Thursday 5 March to 4pm Thursday 21 May

Late Fee: 4pm Thursday 21 May onwards

Note: all fee deadlines based on UK time

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Diary



10 March – Design at Work for Impact:

Making presentations more visually persuasive and engaging in order to sell your ideas more effectively.



12 March – Germany Local Chapter Meeting

Venue: Umweltforum Auferstehungskirche, Pufendorfstrasse 11, 10249 Berlin



14 April – Digital Ethnography: how to

structure a digital ethnography project and present outputs in an engaging way



12 May

Disclosure Requirements and the Impact on Market Research

23 - 25 June 2015 – Pharmaceutical

Market Research Conference

Venue: Amsterdam



Get in touch

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

Bernadette Rogers, General Manager

Tel: +44 (0) 161 304 8262

Email: generalsecretary@ephmra.org

www.ephmra.org

Produced with the Environment in mind.



Any views expressed in this Newsletter do not necessarily reflect the views of EphMRA.

Welcome to EphMRA news



It's March again and time to book for the premier healthcare market research event of the year – join us in Amsterdam. Looking forward to seeing you there.

You can find in this News details of all the benefits on offer and the added value changes made.

In addition the benefits included in your membership fee have never been higher.

Website: showcasing for the Association, you can find many resources to support your daily work including:

Webinars: EphMRA has a great range of webinars on offer but we appreciate that busy schedules do not facilitate attendance at times. You can catch up by listening to the recording, reviewing the slides or scanning the summary report – all available in the members section of the web site – members log in – events – webinars.

Key Points Guides: EphMRA has developed a series of Key Points booklets which are designed to provide an easy-to-read guide to support members when you are looking for an at-a-glance reference document.

Six booklets are now available on the web site (via members log in – Ethics):

1. Market Research for non Market Researchers
2. Market Research, Ethics Approval & Non-Interventional Research
3. Market Research with Patients and Carers
4. Market Research and Incentives
5. Social Media Market Research
6. eMobile Market Research

Keep in touch with EphMRA by following on Twitter [@EphMRA](https://twitter.com/EphMRA) and join over 2300 members of our LinkedIn group – all our news is shared across social media and it's the quickest way to find out what is going on.



Bernadette Rogers

General Manager

generalsecretary@ephmra.org

Board Update

Keeping you in the loop

Emails are regularly pushed out to all contacts but you can also keep up to date by joining the EphMRA LinkedIn Group and following EphMRA on Twitter. All our news is shared across these channels.



Copy Deadlines

April 15 2015 is the deadline for submitting your copy for the June News.

Send to: generalsecretary@ephmra.org

Future editions:

June Edition

– Copy Deadline 15 April 2015

September Edition

– Copy Deadline 7 July 2015

December Edition

– Copy Deadline 15 October 2015

Advertising

1. eNews

You can buy a half page or full page advert in the eNews and we can now hyperlink your advert to a website address etc. Please provide this with your advert.

Half page

150* swiss francs

Full page

275* swiss francs

*Prices in Swiss Francs (CHF)

2. Home page website box advert

Our website home page has now been adapted to carry adverts – this is on the left hand side of the website and more than one advert can feature – the adverts rotate every few seconds.

Contact EphMRA – generalsecretary@ephmra.org to advertise

Adverts can be booked on a calendar month basis starting on the first of the month, which is when the adverts are uploaded (nearest working day).

Price: 200 swiss francs per month for members.
300 swiss francs per month for non-members.

The Association is continually evolving to meet members' needs and to further enhance our events offerings, the Board has formed a strategic events planning group comprising these Board members:



Bernd Heinrichs

Head of Global Market Insight Team
Grünenenthal



Sarah Phillips

Head of Research
Prescient Market Research Ltd



David Hanlon

Senior Group Director
Kantar Health

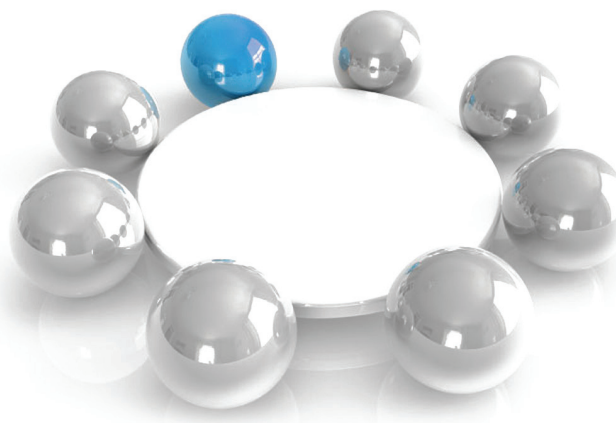
Working with Caroline Snowdon, Events Manager and Bernadette Rogers, General Manager, the group will take a longer term view on events planning in terms of ensuring that:

- The structure of events is reviewed and refreshed as appropriate
- Topics are co-ordinated and developed across events
- Upcoming and hot topics are reflected and aired
- The Future Leaders Group adds its voice

As you will read in this edition of The News, pharma membership of the association is at one of its highest levels, demonstrating the value that EphMRA is bringing and so we are honing our offerings to bring the greatest value.

Many thanks

EphMRA Board



EphMRA Full Members

Over 40 pharma companies are now members of EphMRA – an all-time high, with more than 10 new Full Member applications being approved by the EphMRA Board since 2013.

Not only are there more Full Member companies than ever before, but the membership is becoming more diverse – in addition to traditional big and mid-sized pharma companies, members now also include biotech companies, therapy area specialists, companies focusing on devices, technologies and analytical instruments and diagnostics companies. Each one is dedicated to the development of innovative products which improve lives.

Research-based biotechnology

In research-based biotechnology, EphMRA welcomes Biogen IDEC, Gilead, Ipsen and Celgene – all companies developing and commercialising innovative medicines in areas of high unmet need – cancer, HIV/AIDS, severe immune inflammatory conditions, endocrinology and neurology.

Specialty pharma

In specialty pharma, EphMRA welcomes Tillotts – a fast-growing pharma company focusing on gastroenterology, and also Grifols – a Spanish multinational pharmaceutical company specialising in blood-plasma products, diagnostics and a variety of products to help blood banks collect, process and store blood for medical purposes.

Now into a second year of EphMRA membership, Fresenius-Kabi is a global healthcare company specialising in life-saving medicines and technologies for infusion, transfusion and clinical nutrition.

EphMRA is delighted that Henrik Schwaighofer from Fresenius-Kabi has joined the Data & Systems Committee and we appreciate his input.

Devices

In the devices area, Swiss-based Phonak engages with all those affected by hearing loss, supplying life-changing, fully-digital devices to restore hearing. Market research at Phonak involves listening to hearing care professionals and giving a voice to all those suffering from hearing loss.

Diagnostics

In diagnostics, new EphMRA member BioMerieux provides diagnostic solutions in the areas of infectious diseases, cardiovascular emergencies and targeted cancers, improving public health worldwide.

In 2014, EphMRA President Thomas Hein joined Thermo Fisher Scientific and introduced this innovative technology company to EphMRA. Thermo Fisher Scientific develops innovative analytical instruments, laboratory equipment and specialty diagnostics, offering improved solutions across the spectrum of research, medical diagnostics and applied sciences.

So, EphMRA welcomes these 10 new Full Members, all strengthening the collective business knowledge within the association.

Ethical issues affect market research in all companies; the professional standards, training activities and peer-to-peer networking opportunities offered by EphMRA have been important in attracting these new members.

EphMRA aims to bring peers together in a hub of excellence in healthcare market research. With all companies working together, sharing experience and combining expertise we can drive the development of best practice in market research within our industry.

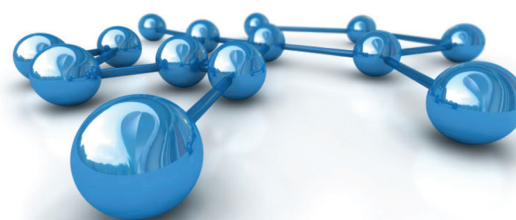
An active recruitment campaign by the EphMRA Executive Board is ongoing, aiming to bring in more new Full Members and further extend EphMRA's activities.

Thanks for your support – great to have you on board.

Fiona Lake

EphMRA Engagement Officer

Associate Member Update



Join the Executive Board as an Associate Member and Add your Voice

This May and June sees the elections again for the Associate Members on the Board.

The current Board Members are:



David Hanlon

Senior Group Director
Kantar Health
Board Contact: Forward Thinking Group, Events
David.hanlon@kantarhealth.com



Richard Head

Director
The Research Partnership
Board Contact: Training and Future Leaders Group
richardh@researchpartnership.com



Kim Hughes

CEO
The Planning Shop International
Board Contact: Forward Thinking Group
Kim.hughes@planningshopintl.com



Gareth Phillips

Managing Director UK and Head of Western Europe
Ipsos Healthcare
Board Contact: Training and Future Leaders Group
gareth.phillips@ipsos.com



Sarah Phillips

Head of Research
Prescient Market Research Ltd
Board Contact: Events
sphillips@prescientmr.com

These Board Members have ensured the voice of the AMs have been heard at Board level and they have been active right across the Association. Representing your colleagues and being at the heart of the Association's strategic decisions ensures the activities and offerings to members are on track and deliver added value.

Over the past two years Associate Members have given their strategic input into a wide range of agenda items including:

- Strategic Plan – shaping and implementation
- Events – looking at the type of venues we need
- Geography – what should our reach be?
- Target audience – who should EphMRA be delivering to?
- New website – looking at how the website will showcase the Association
- Conference Programme innovations
- Training and Professional Development offerings
- Forward Thinking Group
- Future Leaders Group

In addition, the Board AMs regularly discuss issues raised by AMs and feed the ideas into Board discussions.

EphMRA now invites all Associate Member companies to consider nominating a candidate

Who can apply?

- EphMRA will accept applications to join the Board from any Associate Member company.
- However, only one person per Associate Member company can put themselves forward as a candidate. This will facilitate a spread of representation and eliminate multiple applications from one company.
- The deadline for applications is 30 April 2015.

Time Commitment:

- It is a two year term of office starting 1 October 2015 and ending 30 September 2017.
- At least two F2F meetings a year (one is held at the annual June conference).
- Other telecons every one-two months.
- Attend the annual conference and other EphMRA events, eg NYF.
- Participate in Associate Member meetings when Associate Members attend e.g. at NYF or annual conference.
- Please note that all EphMRA Committee/Working Group positions do require you to work as a team with other members – thus please only apply if you are able to give time at appropriate moments to answer emails etc, attend meetings and telecons. AMs who join the Board and are then subsequently not able to fully participate due to workloads or an extended leave of absence, may be asked to leave the Board.

At the end of March you will be notified by EphMRA as to how to apply and the elections can then take place. All AM companies will be able to cast their vote in May and June.

Agencies who are EphMRA members

(membership invoice paid as of 30 January 2015)

• 42 market research	• FocusVision Europe	• Nueva Investigacion
• AplusA	• G&G Associated	• OMI
• Accurate Market Research	• Genactis	• Oncology Information Service
• Across International	• GfK Healthcare	• OpenHealth
• Adelphi	• GIM	• Optimal Strategix
• Adept Field Solutions	• Global Perspectives	• Pharma insight
• Advanced Healthcare Research, Shanghai	• GO Medical Fieldservice	• Pharmore Research
• Aequus Research	• groupH	• Phoenix Healthcare
• Albar Research	• Hall & Partners	• PMR Research
• All Global	• Healthcare Research Worldwide	• Point Blank International
• Amber Marketing	• iCONSULT research & consulting	• Praxis Research
• Anterio	• IFAK Institut	• Prescient Market Research
• Ashfield Insight	• IFOP	• Produkt und Markt Research
• Aspecto	• IGV	• Psyma international
• Aurum Research GmbH	• IMS Health	• QQFS
• Bazis IG Ltd	• Incite Marketing Planning	• QualWorld
• Beyond Data	• Indago Health	• Quantum Fieldwork Argentina
• Big Fish International	• InSites Consulting	• Research Excellence
• Block de Ideas	• Instar	• Research Now
• Blueprint Partnership	• Intercampus	• Research Partnership
• Brains & Cheek	• Ipsos Healthcare	• Ripple International
• BP Research	• Inter-View Partners	• Schlesinger Associates
• Cegedim Strategic Data	• JMax Inc	• Schmiedl Marktforschung
• Cello Health Insight	• Just Worldwide	• Searchlight Pharma Partner
• Cetas Healthcare	• Kantar Health	• Sermo
• Citation, Japan	• KeyQuest Health	• SGR International
• Clarity Pharma	• Kiosk	• Simpson Carpenter
• Complete Medical	• KTJ Group	• SKIM
• Complete True Life	• M3	• Smartanalyst
• ConsuMed Research	• Made in Italy	• SSRI
• Core Market Research, Taiwan	• Maritz Research	• Stethos International
• DataPower	• MarketSense	• Stratega Poland
• Demanda	• medeconnect	• suAzio
• Double Helix	• Medi-Mark	• Synapses quali
• Doxa Pharma	• Medi Pragma	• Szinapsis, Hungary
• Drug & Safety Institute	• Medical Collective Intelligence	• TAB Healthcare
• Dtw Research Group	• Medicys Ltd	• The Planning Shop International
• East to West	• Medixline GmbH	• Themis
• Edge Consulting	• Medpirica	• Time Research
• Elma Research	• Medsight	• Top of Mind
• EQ Healthcare	• Morpace	• Tribe Research
• Eumara AG	• mHealth	• UGAM International
• Expert Research, Brazil	• Millward Brown	• Viewpoint Research & Consulting, Taiwan
• Farminform	• National Analysts	• Zeincro
• Fieldwork International	• Navigant	• Zeste Research
• Fine Research Latin America	• Neolite Co.	• ZS Associates

Update from the Future Leaders Group



The Future Leaders Group (formerly Mid Level Group) is a unique forum for the upcoming and developing talent in the healthcare market research arena. Establishing active engagement with the Group members is key to ensuring the Future Leaders remain positively involved in our industry.

This is what the Group aims to achieve:

- Professional development opportunities
- Networking forums
- Senior Manager interaction (New Year Forum)
- Ensuring the Future Leaders' voices are heard at EphMRA Executive Board level

Who is the Steering Group?

Thanks to our active members who are shaping the initiatives for our industry's future talent.

Jennifer Curtis

Consultant
ZS Associates
jennifer.curtis@zsassociates.com

Carl Vandeloo

Senior Customer Insights Manager UCB
Carl.Vandeloo@ucb.com

Darren Grainger

Associate Director
Ipsos Healthcare
Darren.Grainger@ipsos.com

Rob Rawlinson

Senior Account Executive
Hall & Partners
R.Rawlinson@hallandpartners.com

In addition, for strategic guidance the group liaises with two Executive Board contacts:

Richard Head

Director
Research Partnership
RichardH@researchpartnership.com

Gareth Phillips

Managing Director UK and Head of Western Europe
Ipsos Healthcare
gareth.phillips@ipsos.com



Update from the New Year Forum on 20 January 2015 in Paris:

Venue: Hilton Hotel, CDG Airport, Paris

Future Leaders benefitted from three insightful sessions focusing on 'From Information to Insights for the Business' at the NYF:

Developing Expansive Insight: From a vertical to a horizontal mind-set

Speaker: Andrew Vincent, Owner, Waves Research and Consulting

Those of us working in ad-hoc market research, whether as a commissioner or a supplier, mostly operate within a project orientated mind-set. We brief, we execute, we feedback, we move on. As pressure increases to speed up the process and to make feedback as succinct as possible, the need to take time to gain even more valuable insights from the 'cutting room' floor has become even more important. In addition, with increasing pressure on budgets, we need to squeeze every drop of value that we can from data and we need to optimise the data that we have. So, integrating data from different sources has become essential for all researchers – whether on the agency or client side. This interactive session demonstrated how cross-project thinking is key to optimising the value of market research and enables us to get to the heart of the business.

Visualisation and how to sell it

Speaker: Simon Dunn, Creative Director, Keen as Mustard Marketing

Creating impactful and powerful presentations is something we all strive to achieve and we know that this will enhance the insights that we have distilled from the data. But how do we achieve this, with more and more pressures on time? This session provided practical guidelines for creating more visual presentations, which will add value to your research insights for key stakeholders.

How to 'sell' insights to key stakeholders

Speaker: Andrey Evtenko and Jeremy Pace, Consumer Insight Specialists, Nestlé Research Centre, Geneva

This paper took the previous two presentations to the next stage. Assuming that we have gained as much value as we can from the data and presented it in an impactful and memorable way, how do you then convince key stakeholders that key actions need to be taken as a result of these insights? Whether on the pharma or agency side, this session provided valuable guidance to achieve this objective.

Social Media Update – Bringing the EphMRA community closer together

Through our Twitter and LinkedIn channels we continue to bring members the very latest EphMRA news and events as they happen

Over the last 12 months, EphMRA has seen an exciting array of technological advances; from our paperless 2014 Conference, the creation of the interactive flagship E-Newsletter and the launch of our brand new and exciting website.

Each of these initiatives represent a significant step forward for EphMRA in our ongoing effort to continually improve the personal benefits of EphMRA membership and while we're keen to shout about all our exciting news as soon as we can, we also want to hear your feedback.

That's why we're delighted that members are using Twitter and LinkedIn to keep both the EphMRA team and their peers updated.

Working alongside our PR agency, Beattie Communications, we've significantly expanded the remit of our social media channels over the last 12 months to match the fast-paced lives of our members with the ever-increasing number of events and webinars and news provided by EphMRA.

In the past year, the number of followers of the **@EphMRA Twitter account** has grown from 353 to 525 while the level of engagement through retweets and 'favourited' tweets has grown significantly.

Likewise, the number of members of the LinkedIn **EphMRA – encouraging excellence in providing insights combined with business knowledge** group has also grown from 2,159 to 2,398. The group is in fact the third largest generator of traffic to the central EphMRA website; a fantastic achievement.

A key focus of our Twitter campaign in 2014 and going forward is to provide an invaluable hub of vital information in advance of and during recent EphMRA events. You will have noticed the use of hashtags such as **#EphMRA2014** and **#EphmraNYFParis** specifically created to allow members to easily view all the very latest updates and Member feedback on a particular event in one place.



In addition, EphMRA is always incredibly grateful to our members who give up their time to convene and speak during our events, and as such, we have adapted our social media to ensure participating members' efforts are highlighted across our community.



You will have also noted that during last year's 2015 Conference, we posted Twitter updates in real time offering accurate 'up-to-the-minute' information for attending members on where and when talks and sessions were taking place. An innovation that we're delighted to hear was extremely helpful to members.



We have also prioritised the promotion of all event registration details as soon as they become available. The feedback has been that it is incredibly useful especially in relation to 'early-bird' registration offers for our annual Conference.

Moving forward, our strategy will continue to be the promotion of EphMRA key 2015 events, webinars and news but we are always keen to increase the direct engagement with EphMRA members. The EphMRA social media channels are a great opportunity for members to highlight their own successes, share ideas and vitally engage with each other so please do stay in touch!



Keep in touch **@EphMRA**

All the tools you need are now in one place.

We've gathered worldwide leaders in qualitative and quantitative market research — so you can power all your research projects from one single source. Gain insight like never before through our full suite of market research products.





committee focus

EphMRA ATC Classification Committee



New ATC classification developments for 2015

The Classification Committee confirmed 2015's new ATC classes for implementation at its December 2014 meeting. These new developments, plus other specific changes to the ATC Guidelines and the full 2015 Guidelines, are available now on the EphMRA website.

The developments are as follows:

- A:** Rationalisation of the definition of the enemas class in drugs for constipation
- B:** New class for products specifically for hereditary angioedema
- G:** New class for emergency contraceptives
- G:** Split of the erectile dysfunction class to consist of a specific class for PDE5 inhibitors and an 'others' class
- J:** New class for integrase inhibitors, a subtype of HIV antivirals
- L:** New class for interleukin inhibitors

December 2014 Meeting

Pfizer hosted the December 2014 meeting at their offices in New York. At this meeting, the Committee finalised the developments and other changes for the 2015 version of the ATC Guidelines. In addition, further work was done on classification developments in the pipeline. Some of these are targeted to be sent out for voting by EphMRA/PBIRG in May 2015.

Further discussion and decisions were taken on several other topics raised by companies. The summary of current projects and decisions is available to EphMRA members on the EphMRA website.

WHO/EphMRA ATC Comparison Document

The Committee produces a document to help users of the EphMRA ATC system in understanding how it differs from the WHO ATC system. This document is updated every year with any additions arising from changes in both systems, and is available via the EphMRA website.

Next Meetings in 2015

March/April meeting: scheduled for 31 March - 1 April

June meeting: week beginning 22 June

Committee Apprentice Vacancy

The Committee has a vacancy for an 'Apprentice' position. This is an ideal learning opportunity for someone new to the industry. For further details, please contact Bernadette Rogers (generalsecretary@ephmra.org) or one of the Committee members (listed on www.ephmra.org).

Syndicated Data Committee

Database of Syndicated Services (DSS) – Coming soon!

This database will provide a repository of information about available syndicated services. It will be available to Full (Pharma) Members helping users to identify services and agencies easily and quickly.



The new OpenData

Providing an easy to use, central resource of freely available information on the web, this new version of the OpenData service offers enhanced functionality and enables log-in just one-click away from the Members Area of the EphMRA website.

We want to hear from you!

The Syndicated Data Committee would welcome any suggestion regarding new areas that members would like us to explore or develop.

Equally, we would like your feedback on any of the services and information we have previously provided. Just drop us an email and let us know what you think, email to:

sdcommitteechair@ephmra.org



Data & Systems Committee

The Committee welcomes back Rebecca Leyland who will replace Jackie Lord to represent AstraZeneca.

The committee members are:

Catherine Beaucé (Chair)

Sanofi France

Karen Belentani

Takeda Pharmaceuticals
International
Switzerland

Markus Kaemmerer

Abbott Products Operations AG
Switzerland

Henrik Schwaighofer

Fresenius Kabi
Germany

Rebecca Leyland

AstraZeneca
UK

Christopher Wooden

Cegedim Strategic Data
UK

Petra Mannechez

Bayer Healthcare
Germany

Gema Parlange

IMS Health
UK

Ralf Jansen

Boehringer Ingelheim GmbH
Germany

Jeremy Hillman

IMS Health
UK

Jacky Gossage

Glaxosmithkline
UK

Learning & Development Committee



The current LDC members are:

Julie Buis

Aequus Research
UK

Alexander Rummel

Aurum Research
Germany

Rich Kaminsky

Boehringer Ingelheim
USA

Jayne Shufflebotham

Themis Analytics
UK

Marcel Slavenburg

SKIM
Netherlands

We are looking for Full (Pharma) Members to join the Committee so that we can shape the training offerings to further meet the needs of those working client side.

Interested? Please do get in touch –
generalsecretary@ephmra.org

Each Pharma company gets two free places at the training courses in June during the conference (fee payable to attend these).

What has the Committee been working on?

The 2015 Training Plan is now available on the website:

Three Webinars have already been undertaken in January and February:

- **Code of Conduct for Non-Market Researchers reviewing Market Research**
- **Optimising Lifecycle Management – 10 Drivers of Success in a Competitive World**
- **Are your numbers telling the right story? Best Practices in Epidemiology to support Market Research and Forecasting**

The slides and recordings are available on the website should you wish to catch up (members log in – events – webinars).

June workshops

On Tuesday 23 June, three Training Workshops are offered:

Workshop 1:

Strengthening the role of market researchers in product forecasting

Workshop 2:

Getting the most from your secondary data sources: enhancing decision making in specialty and mass market therapy areas

Workshop 3:

How ehealth can change your life: how it is impacting market research both now and in the future

Timing:

All Training Workshops start at 12.30 and finish at 16.00. A light working lunch will be provided at the start of the Workshop, as well as refreshments part way through.



In 2015 we're celebrating our
25th anniversary of dedication
and excellence in global
healthcare market research.

Be part of our exciting plans
for the next 25 years.



London

New York

Paris

Lyon

aplusaresearch.com

Code corner

Working For You



EphMRA is supporting members in their international activities:

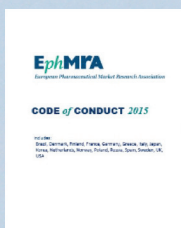
- Continually developing our Code of Conduct to reflect changes in the legal and ethical environment
- Providing guidelines to support you in Adverse Event Reporting
- Having a dedicated Ethics Committee made up of Full and Associate Members working for you
- Offering a confidential Enquiry Service – for you to get your Code questions answered
- Providing up-to-date training
- Offering you the opportunity to certify yourself through the Code Competency Accreditation

What's New

2015 Code of Conduct Update

We issued an updated Code of Conduct in January 2015. This includes, amongst other things, updated and new detail on:

- EFPIA's Disclosure requirements
- Product and device testing
- Market research and ethics approval
- Loi Bertrand in France
- Dienstherrengenehmigung (employer permission) in Germany
- Greece – which is now covered by the Code



Update on EFPIA's Disclosure Requirements

EphMRA has provided a detailed update on EFPIA's Disclosure Requirements and their impact on market research on the website, it covers:

- Background
- When disclosure is required
- When disclosure is not required
- Reporting format and information to be disclosed
- Country of disclosure
- Public disclosure
- Reporting responsibility
- Reporting timetable
- The consequences for market researchers

What's New (Continued)

Online Adverse Event Reporting training

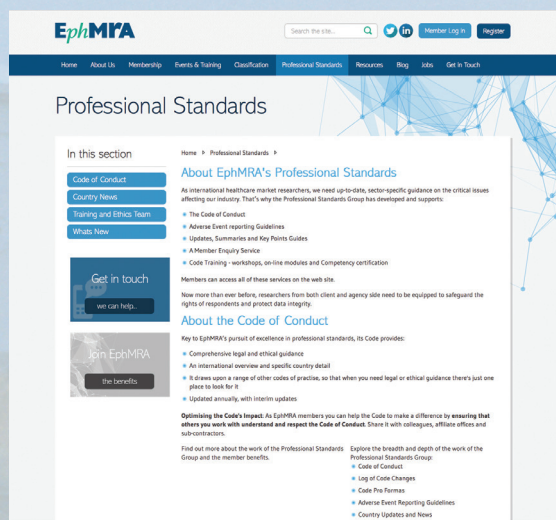
Adverse Event Reporting training based upon EphMRA's guidelines is now available free of charge to members.

It is accompanied by a competency test. For those EphMRA members that are also BHBIA members, a partial AER test will be offered which covers EphMRA specific requirements and, in combination with a BHBIA certificate, meets EphMRA's requirements. So members of both organisations do not have to take two full tests.

Professional Standards web pages improved

We have improved the Professional Standards website pages making it clearer what 'ethics' resources and services there are, and where to find them. Online members can access:

- Code of Conduct including a log of changes
- Enquiry service
- Code training
- Code Competency test
- Adverse Event guidelines
- Key Point Guides
- What's new updates
- Ethics webinars
- Country news
- Ethics Team membership



Key Point guides

We have introduced a series of short and easy to read guides dedicated to Code guidelines on particular topics:

- Market Research for Non-Market Researchers
- Market Research, Ethics Approval and Non-Interventional Research
- Market Research with Patients and Carers
- Market Research and Incentives

The above are now available on the website and we are next looking to develop:

- Adverse Event Reporting
- Device Market Research
- Definition of Market Research
- eMobile Market Research

If you have suggestions for topics for Key Point Guides, please let us know by contacting Bernadette Rogers.

External affairs

We liaise closely with other market research associations – ESOMAR, CASRO, ADM and SYNTEC and with regulators – EFPIA, the EMA, the FSA, and the ABPI.

During 2015 we'll be working hard with external stakeholders to:

- Raise awareness and promote use of EphMRA's the Code of Conduct
- Liaise with other organisations to help them to understand market research
- Collaborate so that we can take into account and shape the impact of their guidance on market research

Training webinar

In January, an updated 'Code for Non-Market Researchers Reviewing Market Research' webinar took place. It was well attended and received. The webinar successfully targeted personnel in international roles involved in contributing to and reviewing market research materials - such as medical, clinical, drug safety and marketing personnel.

The slides and recording for this webinar are available to members on the website.

What's coming up



Training plans

Two more ethics webinars are planned in 2015:

In May – Disclosure requirements

Recent times have seen the introduction of an increasing range of 'disclosure' requirements that impact market research.

Legislators in the USA and France and regulators in Europe now require disclosure of certain types of market research payments made to healthcare professionals that meet certain conditions.

This webinar will explain these requirements, what they mean in terms of reporting and the implications for informed consent and data protection.

It is appropriate for those that must supply this information and those that must disclose it, such as market research professionals in commissioning companies, market research agencies and fieldwork companies.

In October – Country and regional differences

EphMRA's Code of Conduct offers international guidelines and differences are highlighted where exceptions exist.

To help members understand where and why these differences exist, EphMRA is running a webinar that will highlight the differences in ethical and legal requirements that impact market research in the 15 countries covered within EphMRA's Code of Conduct. These are Brazil, Denmark, Finland, France, Germany, Italy, Japan, Korea, Netherlands, Norway, Poland, Russia, Spain, Sweden and the USA. This webinar is for anyone involved in commissioning or executing multi-country market research, whether on the agency or client side.

If you have any training needs or suggestions, please contact Bernadette Rogers.

Voluntary register of Code Certified Associate Members

A voluntary register of the number of agency personnel Code certified by agency is now in development. This will become available to EphMRA members on the website.

What are members doing?

Code of Conduct Online Training & Competency Test

In 2014, 259 individual members passed the Code of Conduct Competency Test. In its first ten months of launch 114 individual members took and passed the joint EphMRA/BHBIA Competency Test too!

In 2014, 264 members applied to undertake the online training, over 700 members have applied for the online training module since it became available.

If you wish to join these growing ranks, the training and the competency test are available [free of charge](#) on the EphMRA website.

In addition, Full and Associate Members can take advantage of EphMRA's flexible approach to training and can commission tailored, in-house Code of Conduct training workshops and webinars.

Code enquiries

Code enquiries continue to come in to us every week, covering a very wide range of topics. If you have any questions on the EphMRA Code of Conduct, the confidential Code Enquiry service is available on the website for all EphMRA members [free of charge](#).

Who's Who

Your Ethics Committee

Committee Co-Chairs:

Georgina Butcher
Astellas Pharma Europe

Ian Barker
Ipsos

Committee Members:

Christine Mai
AplusA Research

Roni DasGupta
M3 Global research

Karen Giorgi Vigo
Shire

Solvea Lamarina
Pfizer

Peter Eichhorn
GfK

Xander Raijmakers
Eli Lilly

Piergiorgio Rossi
SGR International

Supported by:

Catherine Ayland
Ethics Consultant

Bernadette Rogers
EphMRA General
Manager

Compliance Network

The Ethics Committee also connects with experienced compliance officers in Associate Member companies to ensure all views are taken into account.

Andy Dallas
Director of Fieldwork
and Compliance
Manager,
Cello Health

Lucie Eggerickx
Adverse Event and
Contract Manager,
psyma

Matteo Cappai
Quality and Compliance
Manager,
WorldOne

Christine Dunbar
Agency Contracting and
Compliance Manager,
Adelphi UK

Celia Dacombe
Compliance Manager,
Research Partnership

Jessica Santos
Global Compliance
Director,
Kantar Health UK

Events

Full steam ahead to the EphMRA Conference – 23-25 June 2015!

Register Now!

We've listened and acted on your feedback to make this year's conference a 'must attend' event in the pharma/healthcare market research calendar. Here are some of the innovations you will see at this year's conference in Amsterdam:



More sessions and more networking time:

The conference will open early on Wednesday morning and take place all day Wednesday and Thursday. The sessions will be arranged to provide everyone with more time to network and to spend more time together.

Conference hub:

This new area will give a 'heart' to the conference, where you can spend down time, and chat with colleagues.

Sponsors and exhibitors:

We have listened to everyone who asked for the sponsored pens to come back so there will be new packages for sponsors and exhibitors. For exhibitors, the agency fair will be open throughout the conference, and will be the centre of the meeting. Events and refreshments will be held in the fair to maximise networking opportunities. There are also a number of additional freebies for exhibitors who will also have access on two occasions, each for 25 minutes, to one of the private meeting rooms available at Beurs, so that they can set up private meetings with delegates.

Sponsors can choose their exhibition booth position from the plan and will be offered first choice in order of booking and paying for the sponsorship – this is ahead of all other bookings. EphMRA will issue the agency fair plan in advance and first to sponsors.

Welcome cocktails:

These will make a welcome return, and the evening social event will be held in the agency fair, complete with entertainment. We are planning some great interactive games and activities which will provide opportunities for even more networking and sharing the ambience of the conference with colleagues.

Training workshops:

These will now move back to Tuesday (small attendance fee payable).

The EphMRA app:

Following last year's conference where we used iPads on site, we have again listened to feedback from delegates and have been working on an app for the event. This will be available well in advance of the conference to delegates who have paid to attend.

The app will provide delegates with key information about the conference including the programme, speaker information, agency fair guide and local information.

This is an exciting new offering for delegates and enables attendees to use their own devices to access conference information, whether it be on a mobile, tablet or laptop computer. At the conference, you will be able to connect with colleagues, share experiences and have all the event information at your fingertips on and off site.

Printed information:

Although EphMRA is committed to making the conference as paperless as possible, we recognise that some information is very useful to have in paper format on the day. Having listened to feedback from the 2014 Conference, EphMRA will print a handy sized, simple programme for delegates to use on site, as well as the delegate list. Everything else will be on the app but all presentations will be available to download from the app once they have been presented.



For Pharma delegates, EphMRA is also offering the following:

Full Member networking lounge:

We appreciate that part of the value of being at the conference is to network with other pharma delegates. To facilitate this important benefit there will be a Full Members only networking lounge available so you can arrange meetings and discuss issues with other pharma colleagues.

FM registration packages:

Tailored registration fee packages have been developed to best reflect Full Member company sizes.

Agency Fair:

A list of exhibitors will be available about a month before the conference opens along with a description of specific services from each exhibitor. A contact name will be provided in advance for you to make appointments to meet on site.

The Beurs Van Berlage – A wonderful, historic centre for the 2015 Conference

The venue for the conference is a landmark building right in the heart of Amsterdam and was built in the late 19th century by a leading Dutch architect. It was designed as a commodity exchange and influenced many modernist architects, in particular functionalists and the Amsterdam School. Goods, grain and stock were exchanged in The Beurs and all these rooms are unique and inspiring in their own way.



When you attend the conference you will be in the various halls and rooms which were used by the stock traders and feel part of the history which the building embodies.

The Berlage Zaal is one of the most imposing and traditional halls in the entire building, with 21 stained glass windows – a truly spectacular sight.

The Beurs has a real heart and soul and will offer you the opportunity to meet and network with colleagues in an inspiring, comfortable venue, whilst having all the mod cons as well!

Where to stay close to The Beurs

As The Beurs is so central in Amsterdam, there is no shortage of hotels to meet all budgets in the local area. The Crowne Plaza, Amsterdam City Centre, Hampshire Hotel, Rembrandt Square and Eden Hotel, Amsterdam Centre are just three of the hotels within a few minutes of The Beurs, which will offer you a comfortable stay right in the heart of Amsterdam. Please look at the EphMRA website for more information about the hotels near to The Beurs.



New Year Forum 2015

20 January, Paris

A great day for members to network and be inspired

Around 80 EphMRA members from pharma and agencies met on 20 January at the Hilton CDG in Paris for a highly informative and inspiring day of papers and discussions. This was the first meeting of the year and kick-started the excellent programme of events which EphMRA has to offer its members with great impact.

There was a whole range of different topics on offer to members – appealing to both Senior Managers and Future Leaders in the industry. The day started with a lively discussion amongst all delegates about how to break down boundaries between market research and other functions within both pharma and agencies. This saw our esteemed invited panel exchanging their views and ideas on this subject, the session definitely aroused great passion amongst the audience.

Senior Managers were then treated to a great presentation by Dan Nunan, Assistant Professor in Marketing at Henley Business School, who talked about the important and topical issue of anonymisation of Big Data; the challenges that market research faces and how to overcome these obstacles.

He was then followed by Ray Poynter, an expert in Big Data, who talked about the broader aspects of Big Data – in particular, the opportunities, challenges and myths surrounding Big Data. The panel discussion which followed these sessions evoked some interesting debate amongst the panel and the audience.

Our Future Leaders were inspired by a number of excellent presentations and coaching on how to develop insights from information for business. Andrew Vincent, from Waves Research, talked about how to develop expansive insight by moving from a vertical to horizontal mindset, and Simon Dunn from Keen as Mustard Marketing then provided some practical insight into how to create more visual outputs; a great sell for the insights of market research.

Finally, our Future Leaders were challenged by Andrey Evtenko and Jeremy Pace, from Nestle Research Centre, to think about how to 'sell' these insights to key stakeholders. Using a number of different scenarios for delegates to respond to, the session enabled people to think about real life situations where they might encounter difficulties in engaging stakeholders and how to overcome these challenges.

The final session of the day for all delegates was to hear a thought provoking presentation given by Andrey and Jeremy on what motivates people to remain in market research and what might be driving them away.

This presentation was first delivered at an ESOMAR Conference in 2014 and was based on some internal research conducted by Nestle to understand the drivers and motivations of market research professionals. Their presentation was followed by an engaging panel discussion, comprising of our two speakers and panelists with different levels of market research experience.

For a full write up of the meeting and to access the slides in PDF format, please go to the EphMRA website – www.ephmra.org

Update on Local Chapter Meetings Japan Chapter Meeting – 16 October 2014

The first Japan Chapter Meeting was a great success, attracting nearly 90 delegates, with half from the pharma industry, making it probably one of the best networking events in Asia. The day comprised presentations and discussions on the theme of new perspectives on research methodologies and inspirational trends in research. We brought together representatives from pharmaceutical companies and market research agencies to take a closer look at the technologies and developments that are shaping current thinking and decision-making in our industry in the region.

With delegates contributing their thoughts and asking questions to presenters and panellists, the day provided plenty of opportunity for lively debate, learning and networking.

To look at the slides which were presented at the meeting and to read the report summarising all the sessions which took place on the day, please go to the EphMRA website – www.ephmra.org





Germany Chapter Meeting – 12 March 2015

The next Germany Local Chapter Meeting is on the 12 March 2015 in Berlin at the Umweltforum Auferstehungskirche. Registrations are well under way. See the EphMRA website for ongoing information about this event. www.ephmra.org

Why should delegates attend the meeting?

The LCM is the only personal meeting opportunity where all healthcare market researchers in Germany (Industry, full service and fieldwork agencies) are able to jointly discuss secondary, primary research topics and legal challenges faced internationally and particularly in Germany.

The meeting brings together all parties involved in research thus opening the opportunity to understand the challenges within each area and to explore potential solutions and best practices, both from an international and a German perspective.

To get an update regarding
Dienstherrengenehmigung
and adverse events reporting.

To get insights on how
others in our industry
handle these challenges.

What added value will attending bring to both pharma companies and agencies?

...getting inspirational input as well as staying in touch with other colleagues and exchanging latest news and hot topics...

With highly profiled speakers, e.g. practitioners from the market research community and professional bodies, the LCM also serves as a platform to collect and communicate market research aspects to strengthen the profession in the eyes of others influencing the daily work, like procurements and legal departments.

So come to Berlin and join us!

What are the anticipated key take away messages from the meeting?

... best practice solutions for working better together: industry and agency, global and local, legal and research.



Singapore Conference update

It was with great regret that the Board made the difficult decision not to go ahead with the Singapore Conference in April. As you will know, EphMRA has, over the past few years, implemented a range of events in different geographical regions given that many of our members operate in global arenas.

EphMRA has successfully held three conferences in Asia (two in China and one in Singapore in 2013). Each one has been carefully planned in advance to assess the potential number of delegates we could attract and thus make the event successful for all attendees.

The highly successful chapter meeting that we held recently in Tokyo and the innovative format here attracted almost 90 delegates, leading the association to consider that the success of this format could be applied in other markets in Asia.

We looked very carefully at the potential number of pharma delegates based in Singapore who might be able to attend the conference and concluded that this pool has declined since we booked the venue and date. This was an important consideration as a balance of Full (Pharma) and Associate (supplier) delegates is needed to ensure the event is a success.

In addition we received only a small number of synopses in response to the Call for Papers. Were we to proceed, it would mean that a significant amount of resources would need to be channelled into finding and identifying speakers and conference panellists. This would mean resources allocated to other activities would have to be reviewed.

Thus in conclusion, the Board decided that the resources needed to ensure the Singapore Conference is a success should be re-allocated to other activities across the association.

Despite this decision, the Board will continue to actively monitor and review the situation and look forward to facilitating other meeting opportunities in Asia as this is a dynamic region of interest for international healthcare market research.

Webinars – something for everyone

We have already run three webinars this year and have an exciting programme of free webinars planned for members throughout the rest of the year. All webinars can be accessed through our website for members to listen to after the event, as well as the PDF of the slides and short summary report.

Here are just a couple of the webinars we have planned over the next two months:

Digital Ethnography – April 14

How to structure a digital ethnography project and present outputs in an engaging way.

Ethics: Disclosure Requirements – May 12

Recent times have seen the introduction of an increasing range of ‘disclosure’ requirements that impact market research.



Legislators in the USA and France and regulators in Europe now require disclosure of certain types of market research payments made to healthcare professionals that meet certain conditions.

This webinar will explain these requirements, what they mean in terms of reporting and the implications for informed consent and data protection.

It is appropriate for those that must supply this information and those that must disclose it, such as market research professionals in commissioning companies, market research agencies and fieldwork companies.

You can help us: call for expert speakers

EphMRA is still on the lookout for speakers who have expertise in a whole range of different areas whether quantitative or qualitative.

Please contact Caroline Snowdon, Events Manager, if you feel you have some expertise that you’d like to tell us about, so that we can consider you for forthcoming speaking opportunities.

Email to: events@ephmra.org

Making sure we get value for money for services

As a valued member of EphMRA, you will want to know that your membership fee is being spent wisely.

We are constantly talking to our suppliers to ensure that we are getting value for money at all times and we regular review our suppliers to ensure that they are providing the highest quality products and services at the most competitive prices.

Making an Impact

How to write a succesful EphMRA synopsis

Yes, we all know the scenario. Sometime in June, the EphMRA ‘Call for Synopses’ arrives on the mat and we have every intention of submitting a ‘winning’ synopsis and entering the ‘Hall of Fame’ at the next EphMRA conference. We can visualise it all – rapturous applause, congratulatory handshakes, awards – you get the picture. Then the reality hits home and work, home, holidays – you name it – just get in the way and we either don’t submit a synopsis at all or submit one which, quite frankly, doesn’t hit the mark.

So what can we do to help write that ‘winning’ synopsis and receive the adulation that we really deserve?!

Before sharing some useful hints and tips on writing a synopsis for EphMRA, it might help to understand the process that the Programme Committee go through to evaluate each synopsis that is submitted. It’s important to understand that each Committee member reviews every synopsis and rates them according to a number of defined criteria, including their perceived value to members who attend the conference and that a considerable amount of time is spent in this review process. So, decisions are made in a rational and objective manner, taking into account not only the content of the synopsis but whether the synopsis meets the overall requirements of the conference themes outlined in the ‘Call for Synopses’.

If a synopsis is submitted by the company of a Committee member, this synopsis is NOT reviewed by that Committee member, nor are they involved in any subsequent discussion about the synopsis.

All synopses are discussed at a meeting in the Autumn with all the Programme Committee and there is much debate about the relative merit of each synopsis, so the decision whether to accept each synopsis is taken very, very seriously.

For the first time this year, the speaker(s) of those synopses which were short listed by the Committee were then asked to do a short five minute telephone ‘pitch’ to the Committee, to ‘sell’ the value of their paper to the conference. This worked very well and is likely to be repeated for the 2015 conference.

So, how do you write a synopsis which will really get noticed by the committee; that is highly rated and ultimately is selected for inclusion into the conference programme?

Here are some useful hints and tips, which hopefully will help you when you are faced with a blank piece of paper in the Summer and when you sit down to write your masterpiece! They are simply for guidance – they are not rocket science but just based on observation and experience of seeing a LOT of synopses over a number of years.

Do...

Overall theme of your synopsis

- Submit a synopsis which will provide conference delegates with new, up to date insights into whatever topic you are going to talk about. Please avoid submitting a synopsis for a paper which has already been covered by others or yourself before. Therefore, this process should be starting way before the 'Call for Synopses' falls on your mat. You should ideally be starting to keep an ear to the ground NOW for topics which are leading edge and which will inspire, educate or inform delegates at conference
- Try and think what are the popular topics of the moment and then do something different as the Committee is often faced with a number of very similar synopses
- Be very clear what your paper is going to address – what 'angle' is it going to take which will attract the attention of the Programme Committee and ultimately make for a highly interesting, relevant and valuable presentation

The value of your synopsis to conference delegates

- Make it VERY clear what the key learnings for the audience will be from your paper. This may sound blindingly obvious but there have been many, many instances where synopses just don't make this clear enough or are completely missing! Without this in your synopsis, it is very difficult for the Programme Committee to see what the value to the conference will be and hence your synopsis may be rejected. You may have had some amazing insights to impart but if you are not clear enough about them, this would be a great shame. It is helpful to put the key learnings at the beginning of the synopsis, as well as the end, just to make it clear what you perceive the value of this paper will be
- If you are working for an agency, having a pharma company speaker to present with you is very valuable. However, the Committee is much more likely to accept a synopsis where the pharma company speaker has been confirmed – as this shows a real commitment to present at conference. In order to secure a pharma company speaker, you need to plan in advance and not leave writing your synopsis to the last minute

The content and 'tone' of your synopsis

- Prepare a synopsis which is not 'selling' your company services – these synopses are not selected by the Programme Committee
- Don't be afraid to be controversial. It can get people's attention – but then make sure you can deliver!
- Include case studies if possible which are relevant to your paper – these are highly valuable in illustrating key messages and make the paper much more interesting for the audience
- As with all good presentations, try to make your synopsis tell a story – it's easier to digest the key points and makes it much easier to evaluate

- If primary research is a key part of your synopsis, the Committee looks more favourably on synopses where research has already been conducted, as it is much clearer to see what the outputs and deliverables will be. Synopses which rest entirely on 'research to be conducted' are less likely to be accepted, as it is very difficult to pre-empt the findings and therefore what the value to the audience will be

Layout, format and EphMRA specific requirements

- Read through the 'Call for Synopses' carefully and identify which topic your paper might fit into and put this onto the top of the document that you submit
- Give your paper a title, which sounds interesting and intriguing and which sums up the essence of your paper in a few words
- Take care over the layout – use bullet points, visuals, short paragraphs so that it is easy to read
- Write your synopsis in a succinct way – not too much text, otherwise the key messages are likely to be lost
- Include a colour (professional!) head and shoulders photograph of speakers, which EphMRA can use in the programme and does you justice!
- Include short bios for speakers – two to three paragraphs is ample – not your entire CV!

General advice

- Show your synopsis to a colleague to be peer reviewed – it's all too easy to get too close to it and therefore miss key USPs which might make all the difference between 'success' and 'failure'
- Make sure you spend enough time writing your synopsis and don't submit a synopsis that has clearly been rushed and put together as a last thought. You need to create a balance between enough detail to get the message across but not too detailed that the story is lost

Don't...

- Give up if your synopsis doesn't get selected for conference – there will always be other opportunities to submit a synopsis and EphMRA welcomes all submissions.

Good Luck!





State of the Industry

EphMRA Forward Thinking Group

Viewing the market research industry through different lenses

In May 2014, EphMRA began a State of the Industry project amongst all their members with the aim of taking the pulse of the Pharma MR industry from a commercial perspective.

EphMRA's varied membership profile provided an overall picture of the industry, reflecting the disparate viewpoints of companies and agencies and highlighting some key issues facing our industry both today and in the future. The findings showed some interesting differences in perspective between members with apparent 'disconnect' in optimism between companies and agencies.

Some of the main questions are; Do agencies really understand pharma's business issues and do clients really appreciate agencies knowledge and expertise; Are Pharma companies too preoccupied with their own problems to see the bigger picture and do agencies, through contact with a wide variety of stakeholders from a broad range of different companies, have a better overview of the industry as a whole?

Despite current challenges there is still optimism for the future

The challenges of pipeline, patent cliffs and increased pressures on healthcare systems globally, which have had a negative impact on the pharma industry over the past five-10 years, are almost universally recognised. However, a more positive outlook for the future is held, with improved innovation in drug discovery and changing approaches to commercialisation by many.

A 'disconnect' within the industry

A disconnect amongst members was considered to be largely due to the circumstances of the individual respondent, with respondents working for 'Big Pharma' companies currently undergoing headcount reductions clearly less likely to be positive about their situation.

In contrast, agency respondents who were interacting with a broad spectrum of clients (from Big Pharma to small biotechs) and those in small pharma, felt their personal circumstances and employers were able to adapt quickly and nimbly to the changing environment and were able to view the future more positively.

The burden of regulations and compliance is having a negative impact on research

The increase in regulation, compliance and procedural requirements, from internal pharma company sign-off procedures and procurement processes to adverse event reporting and national transparency legislation, is commonly cited as having a major impact on our industry. This impact is expected to increase in the future.

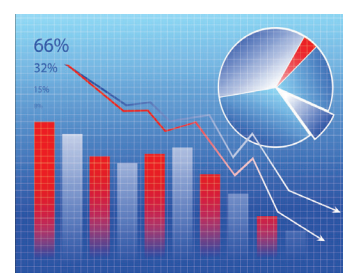
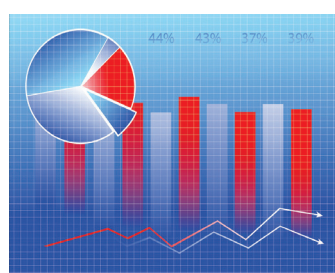
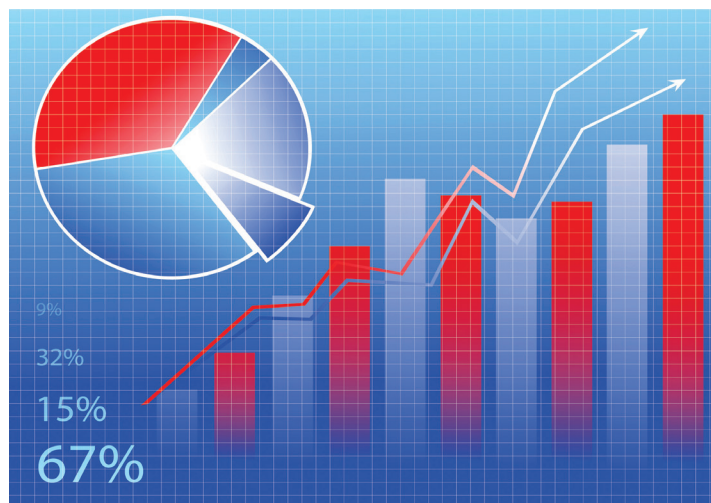
As a result of these pressures, research is becoming more costly and taking longer. Sometimes the scope of the research is adversely affected, both in terms of content covered and markets researched. In addition, with increasing cost pressures, the impact is being felt by the agencies in terms of project profitability and increasing resource required.

There is little expectation that this burden will be lifted in the future. However, EphMRA has a role in educating the wider stakeholders about the role of research and lobbying, on the industry's behalf, to minimise the impact of regulations and compliance requirements.

Managing change for the future

The role of market research within the industry has changed, and will continue to change, with an increased focus on '*doing more for less*', not only in terms of efficiencies within the traditional market research processes, but in terms of embracing new approaches which will deliver greater insight and greater value for money.

However, the role of market research itself and the perceived value it brings to the business is being challenged by some. Examples such as the advent of Survey Monkey and other easily available online tools and the reliance on 'focus groups' to provide evidence for pre-determined conclusions supporting prevailing political views were thought to have eroded the value of traditional research skills – now everybody can field a survey and produce a focus group result to support any point of view.



In contrast, our profession's response has been to focus on becoming better business partners, delivering insight and consultancy to generate commercial value. At one time clients were offered 'quality, speed and cost – choose any two', now clients (internal and external) are increasingly demanding all three, and market researchers are feeling increasing pressure both to increase cost-efficiency and to innovate and improve their offering to maximise value.

Changes in research focus have implications for future market research skills

The shadow of 'Big Data' clearly walks among us, with most researchers fully aware of its potential benefits but equally aware of the challenges of using it effectively to deliver real insight. Whether fearful or excited by its presence, there is a recognition that different skills will be required in order to fully exploit its benefits, with the increasing use of the term 'data scientist' to describe those with the IT and statistical skills required to manipulate those large Real World data sets.

The need for researchers to be multi-skilled, developing a holistic approach to research involving triangulation of multiple data sources in order to reveal the true commercial picture was also emphasised, although the reality of finding individuals with finely-honed advanced qualitative skills, alongside the ability to manipulate and understand large datasets, was considered unrealistic.

The need to step out from behind the 'comfort of the data' and turn the findings into true commercial insight, offering confident recommendations to generate value for the business was widely emphasised.

An increase in therapeutic area expertise is required, particularly in light of the industry shift from blockbuster small molecules to biotechnology and personalised medicine. The oncology field was highlighted as a particularly complex area where specialised therapeutic knowledge was required to be able to set research findings into commercial context.

Anecdotally, research budgets overall were thought to be decreasing as part of the ongoing focus on efficiency; however, continued investment in launch optimisation was reported by many respondents.

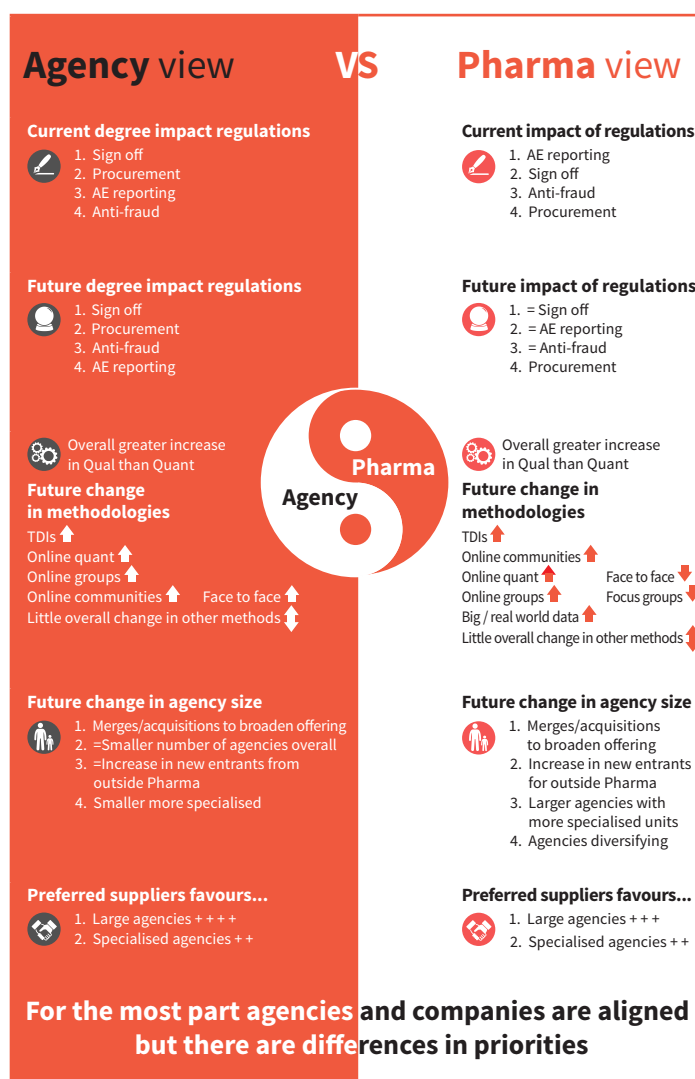
With heightened importance of a successful launch phase to recoup R&D costs, rather than act as a protracted in-market profitable period, many respondents reported a shift in importance to the early development stages, not only to optimise product development and launch, but to provide evidence for a 'quick kill' for products that were not expected to perform adequately in the commercial phase. This highlighted the need for a strategic understanding of the drug development process.

The shift in importance and relevance from the physician to the payer and patient was widely recognised. This is expected to impact on the type of research conducted, with a shift from refining communication materials to focusing on the patient experience. Advances in technology have been suggested as a cost-effective and effective tool in ethnographic research, enabling pharma companies to gain greater insight into how their patients influence treatment and how pharma can enhance the patient experience.

The future landscape for agencies

The focus on cost-efficiency and value generation ('doing more for less' and 'becoming better business partners') provides a natural catalyst to improve efficiency amongst partner agencies, helped along by the independent assessment of the Procurement department. However, this is offset by the increased amount of time spent with bureaucracy and extended timelines which are expected to be at no extra cost.

Respondents' predictions for the size and specialism of agencies are diverse with little consensus apart from the expectation that the situation WILL change (a view held by all but 5% of agency respondents). The focus on technological advances and development and manipulation of large data sets requires investment, perhaps favouring larger agencies, but the parallel need to demonstrate specialisation and innovation to secure one of the increasingly limited places on a Preferred Supplier List may favour a smaller, specialised agency.



Conversely, these pressures could lead to (further) acquisition and consolidation between small/middle/large sized agencies to broaden their offering, reducing the number of agencies overall. Interestingly, half of respondents from both agency and pharma company environments expected to see an increasing number of new entrants from outside of traditional pharma agencies.

The rise of Market Access as a separate specialism

The importance of payers is universally acknowledged. The physician is increasingly restricted in their prescribing choices as a result of the market access landscape, and physician perceptions of products need to be evaluated within this context.

When the role of the payer first emerged, payer research emerged within the domain of market research. Respondents surmised that as the complexity of market access increased, it became necessary to have a dedicated resource to keep current across all relevant, increasingly inter-related, markets. This led to the Market Access specialty being established.

However, there is an opportunity for market researchers to renew and strengthen our association with Market Access. Market researchers have the necessary interviewing skills required to elicit attitudes and behaviours from payers and have a lot to offer our Market Access colleagues, with many already 'dabbling' in this area.

Related to Market Access, the realm of Health Outcomes Research was also highlighted. Although this tends to be an academic specialty, many respondents felt that there was an opportunity to work more closely with Health Economists to provide early insight to guide the selection of clinical measures required by physicians and payers alike.

The increasing focus on patient centricity is likely to see greater interest in 'real-world' research and this sector is expected in the future, but agencies will have to come up to speed when it comes to seeking ethics approval.

Turning data into insight

This long-standing objective continues to be a subject of much discussion. An increasing number of individuals and companies are carving out a reputation for commercial insight rather than data provision. The greater emphasis on value-generation from market research has raised expectations for market research to deliver insight at all levels. However, opportunities certainly exist to take this further. It is no longer good enough to say 'this is the answer'. The researcher now needs to explain what the answer means for this organisation going forward. However, true insight needs a closer working partnership between agencies and all relevant stakeholders in pharma companies.

Achieving consultancy status

There appears to have been a shift in perceptions of management consultancy (McKinsey BCG) versus agency market research consultancy over the years. In the past, the Management Consultant was viewed as the role model to whom the Market Researcher should aspire, and there is increasing recognition today that although Consultants are masters of boardroom presentations, the Researcher has a lot to offer in terms of a rigorous, independent approach.

Consultants and ad agencies are still invited into a company at board level, are privy to the company strategy, interact with senior brains in the company and then distil down the internal knowledge into an impactful, dynamic board-level presentation. However, with the increasing emphasis on customer-centricity, the Researcher can start with the patient, physician and payer, ensuring an objective understanding of the opportunities for the pharma company's business.

The crucial part of the process for Researchers is to turn that understanding into commercial insight and to have the confidence to 'take a view', generating commercially astute recommendations for the business. This is, however, an area for development for researchers in terms of training or recruitment of staff with these skills.



What does the future hold for market research?

The rich diversity of opinion and context of EphMRA members provided thought provoking variation and contrasting opinions for the future of our industry, with several key themes emerging:

- The need to be agile and forward thinking to adapt to the new pharma environment
- To embrace both specialisation and seamless integration of sub-disciplines within our realm to provide a holistic understanding of the market
- To come out from behind our desks to communicate with the wider stakeholders, whether they are allied disciplines or disparate customer and client groups
- To use our skills in understanding the customer to help our industry become truly 'patient-centric'
- To 'raise our game' and ensure that we generate value for our businesses by focusing on innovative solutions to our clients' commercial challenges
- Forge closer partnerships between clients and agencies and be brave in taking a view
- Be prepared to specialise in certain areas to gain greater credibility
- Embrace the increasing world of Big Data / Data science and 'real world research'.

People News



Searchlight Pharma Partner is delighted to welcome Stefanie Sundermann as Moderator and Consultant. Stefanie has a Masters in Medicine Management with focus on Healthcare Economics and Healthcare Assessment and Technologies.



Research Partnership has appointed Moniola Olusanjo as Compliance Manager, expanding the company's existing compliance capabilities and seeking to improve and develop existing procedures. Visit researchpartnership.com



Ipsos Healthcare UK has appointed Savade Solanki as Head of Oncology Insights. Savade Solanki (PhD) will lead the company's global custom oncology work being run out of the UK.



HRW is delighted to announce the expansion of its US team, welcoming Christine Dalzell (pictured) as EVP and Amy Seymour as Research Manager. We're still recruiting, so get in touch!



QQFS is delighted to welcome Stephen Anderson and Rachel Bunting to the Gothenburg team. Stephen will take on the role of Quantitative Research Manager and Rachel becomes Business Development Manager.



Celine Talon joined TPSi as a Senior Research Executive. Helen Rose, Research Executive, has joined the TPSi Oncology team. Jeremy Smith joined the Oncology team as a Senior Research Executive.



Katie Joyner joins Kiosk's healthcare division as Senior Insights Manager. Katie brings with her over four years of healthcare market research experience, both from an agency and a client perspective.

Services News



SmartAnalyst specialises in Analytics, Consulting and Strategic Support to help LifeSciences companies make decisions that drive pipeline and portfolio value; with expertise in Asset, Disease, Pipeline and Portfolio Strategy.



ANTERIO is pleased to announce expanding web research capabilities in Japan, Korea, and China, with a current physician panel of 75,000+. For information, contact ant-gss@anterio.co.jp.



Medical Panel – Over 5,000 doctors based in Poland. A diverse range of specialisations and backgrounds. www.research-pmr.com



Patient Engagement Toolkits: OPEN Health companies OPEN Plan and Engage, map the patient journey to create bespoke patient engagement toolkits for brand teams, helping patients better connect with their treatment.



Hall & Partners specialises in innovative, complementary methodologies to gain deeper insights into the cultural, social and human narratives which shape behaviour.



Qualitative fieldwork experts KeyQuest Health have launched a standalone Analysis service, enabling clients to access KQH's expert medical analysts across 5EU. For more information on KQH Analysis, contact bram@kqhealth.com



Kantar Health launches 'Biosimilars in China: Market Access and Barriers', providing insights into market access, competitive landscape, opportunities in key therapy areas and regulatory issues. www.kantarhealth.com



iCONSULT Brand Status™: Advanced brand tracking including awareness, prescription, image plus unique in-depth diagnosis of marketing and sales activities (impact, relevance), innovative brand value benchmarking. Available world-wide. info@iCONSULT.de

Services News (continued)



Powered by Perception Analyzer®, a gold-standard response technique, providing a one-stop data collection solution, including latest dial models, diligent dial maintenance, and support by Schlesinger Technical Facilitators.



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Company News



Beyond Data acquired by Evalueserve. Our 'mind+machine' approach, e.g. in Active Online Listening, provides sophisticated, multi-language services on a global scale. Ask for more!



QualWorld celebrated its first birthday in January! 2014 was a successful year. We would like to thank our clients, partners and the whole industry for their continued support. Thank you!!



After adding two locations in Latin America last year, SKIM is further expanding: Our Singapore office was opened in January to better serve our clients in the growing Asian markets.



The TAB Healthcare team, specialised in qualitative research, is very proud to celebrate 1,000 studies completed! Top quality delivered with full dedication and enjoyment all along. Thanks for trusting us!



Themis Analytics will host its Client Meeting on 'Future Fit: Developing Your Ecosystem to Enhance Market Information and Analytics for Real Business Benefit' on March 25-26 in the UK (www.themisanalytics.com).



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Social Media is everywhere these days. For health topics, the relevance of the web is growing too. More and more people use the internet – not only as a source of information, but also as a platform for active exchange of experiences or to get advice on health issues. Web-based strategies of addressing people, apps, social media activities and the understanding of web discourses – the knowledge scouts and netnographers of GIM Health will accompany you on your way through the digital health cosmos.



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The added value of EphMRA membership in 2015

Build your knowledge

One of the key benefits of a membership is the opportunity to take advantage of EphMRA's commitment to your professional development. We are providing both face-to-face and online training to keep you at the top of your game professionally and abreast of all developments in the industry. We urge all members to take advantage of our complimentary webinars and publications, tailored to suit your professional needs.

Reach out

EphMRA membership offers a number of opportunities to network with others in your field. We'll provide regular opportunities to exchange with peers and like-minded colleagues, stay informed of developments in the industry and boost your contacts.

Join in

EphMRA's calendar of events offers something for everyone, and members are entitled to significantly lower attendance fees. Our one day local chapter meetings address nationally focused issues that matter to you. Our latest chapter meeting in Tokyo drew 90 attendees all of whom benefitted from excellent papers and a client to supplier networking ratio that is hard to beat anywhere else.

Our annual conferences, held over two days, are jam-packed with opportunities for learning, debate, panel discussions and networking. EphMRA members also benefit from significant event discounts.

High standards

Keeping up to date on industry standards can be challenging, but EphMRA works to keep this as simple as possible. For example our Code of Conduct and Ethics initiatives as well as our Code of Conduct online training and competency online test help you to maintain standards within your own organisation across these important areas.

Getting specific

An EphMRA membership can also help members with their own, specific needs

For Full Pharma Members an EphMRA membership offers:

- The opportunity and resources to combine forces to strengthen the influence of pharmaceutical market research
- Peer-to-peer forums for pharma industry senior managers
- A platform from which to influence information suppliers to ensure they provide high quality data and information. Committees within EphMRA continually work towards influencing data suppliers to achieve this
- An opportunity to vote on changes in the Anatomical Classification System

For Associate Supplier Members an EphMRA membership offers:

- Peer to peer forums just for supplier attendees
- The opportunity to advertise for free in quarterly EphMRA News (30 words)
- Opportunity to join committees and apply to join the Board (when vacancies arise)

With these improvements to the membership package there has never been a better time to be an EphMRA member.

Membership is corporate – so your company joins (not individuals). Get in touch today to discuss how your company can get involved: contact EphMRA on generalsecretary@ephmra.org.