

Welcome to the March 2019 News!

It has been a great start to the year with our Association going strong – lots going on across our committees and working groups – all working on behalf of the membership.

If you are working in the Forecasting area why not think about joining in the discussions in our Forecasting Group which was formed in 2018?

In addition the Devices and Diagnostics Group have re formed and are looking at initiatives to support members.

Code of Conduct –

The review of our code is underway and we are preparing for our new Code to be launched ready for the start of the next membership year (starting 1 October 2019).



Bernadette Rogers
General Manager

generalmanager
@ephmra.org

What did we discuss on ethics at the UK meeting?

The issue about revealing and not revealing the name of the sponsoring company

When you are provided with lists how do we know if the people on the provided list are OK to do market research?



Contents

About the board	3-4
EphMRA Awards	6
Meetings Update	8
Workshops	9-10
2019 Conference Programme	12-18
Steering Committee	19
Sponsorship Opportunities	20
Ethics Update	21
Incentives Overview	22
Committee News	23-25
Member News	26

Copy Deadlines

For the June 2019 News –
deadline is 15 April

**For September 2019
post conference news –**
deadline is 7 July

Send to:
generalmanager@ephmra.org
www.ephmra.org

Get in touch

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

Bernadette Rogers, General Manager
Email: generalmanager@ephmra.org

Keep up to date

EphMRA communicates with members as regularly as practical:

- Send out emails
- Post on our LinkedIn page:
- Use Twitter – follow us:

NEW!

Facebook page – follow us on Facebook and get immediate notifications in your own FB feed

Just like our page – easy and simple.



Find out all the latest news on our Warsaw conference
<https://www.ephmraconference.org/>





About the Board

The management of the Association is undertaken by the Board, which derives its authority from the members, and is responsible for fulfilling the objectives of the Association having regard to the decisions taken by the members at the Annual Meeting.

The Board comprises the following members:

- President
- Vice President
- Past President
- up to 5 regular Board members
- Treasurer and General Manager (non voting)

Up to 5 supplier members may be appointed to the Board. The number of Supplier Members appointed to the Board must not exceed the number of Industry Board members.

Members of the Board for 2018 - 2019 are shown below and on the next page.



Karsten Trautmann
Merck KGaA
Board Industry Member,
President



Thomas Hein
Thermo Fisher Scientific
Board Industry Member,
Past President



Charles Tissier
Treasurer (non voting)



Bernadette Rogers
General Manager (non voting)



Nicola Friend
AstraZeneca
Board Industry Member



Gabi Gross
Thermo Fisher Scientific
Board Industry Member



Richard Hinde
Norgine
Board Industry Member



Xander Raijmakers
Eli Lilly
Board Industry Member



Feel free to contact any
Supplier Member of
the Board -



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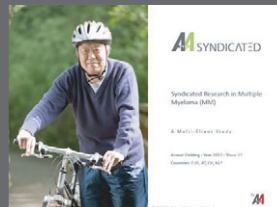


65%
INTERNATIONAL
MARKET
RESEARCH

70+
COUNTRIES

100+ CLIENTS
Pharma, Biotech, Medical Devices,
Diagnostics, e-Health, Generics,
Biosimilars, Rare Diseases

Our latest **SYNDICATED TRACKERS**



Aplus SYNDICATED

ADHD
AML, DLBCL
Atopic Dermatitis
Biosimilars
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Dry Eye, Glaucoma, Retina Diseases
Hemophilia A & B
IgIV market
Inflammatory diseases
Multiple Myeloma
Metastatic RCC
Myelofibrosis

STORYOPT MESSAGE **OPTIMIZATION**



StoryOPT
Optimizing brand story flow

StoryOpt is AplusA's proprietary message testing solution that identifies the most effective messages and brand story flow for your marketing campaign. Testing over 40 messages in one 35 min interview, it allows you to create the brand messaging framework that resonates the most with your target audience.

SUCCESSTRACK™ / SUCCESSTRACK LAUNCH™



SuccessTRACK
Gauge your product performance vs objectives

SuccessTrack is the KPI tracking solution that delivers ongoing insights on the most important indicators of your brand's performance. Our team of experts identify and track the strategic KPIs to help you continually improve your campaign performance.



EphMRA MR Excellence Awards 2019

EphMRA colleagues are engaged in a huge range of healthcare market research initiatives, studies and projects and the Board wants to take this opportunity to learn more and to enable members to showcase their expertise.

We are delighted to announce that we have received the following submissions for the MR Excellence Awards for 2019. We are currently preparing for the next steps when the submissions are assessed and will get back to you then with an update.

Award: Business Impact through Innovation

– sponsored by Adelphi



Submission 1:

Ipsos and Janssen-Cilag by Lucy Bennett: Research Director and Stewart West: EMEA Market Research Manager Immunology

Title:

A 360° Evaluation of the Evolving Biosimilar Landscape

Submission 2:

Kjt Group and Optum by Stuart O'connell, Senior Research Manager and Natalie Erickson, Consumer Insights Manager

Title:

Breaking down walls: understanding the needs of sensitive populations

Submission 3:

Janssen and Cello Health Insight by Stewart West, EMEA Market Research Manager – Immunology Janssen and Gavin Buck, Director, Cello Health Insight

Title:

Enabling Janssen to bring stability to ibd patients

Submission 4:

Janssen and Research Partnership by Sarah Fletcher, EMEA Business Insights Manager and Richard Head, Director,

Title:

Using facial analysis to uncover deeper reactions to pharmaceutical communication materials

Submission 5:

Ipsos ECE by Ellie Tait, Research Manager

Title:

Improving the uptake of HIV testing and treating among young, high-risk men in South Africa

Submission 6:

Hall & Partners by Hannah Chalkley, Strategy Director

Title:

Improving the lives of MS patients through integrated insights

Submission 7:

Brains & Cheek Sian Lewis, First Officer

Title:

Mona Lisa – Building an iconic brand

Submission 8:

suAzio by Jasper van de sande, Business Consultant and Matthew Francis, Business Consultant

Title:

Win/Loss analysis – build your tender strategy

Award:

– sponsored by AplusA

Future Leaders – MR Excellence Case Study Award



Submission 1:

HRW by Faye Holmes, Senior Research Manager

Title:

Outlining key learnings from a multi-market, dual phase segmentation study

Submission 2:

Insight Dojo by Daniel Rayner, Associate

Title:

Using an integrative design to identify opportunities for appropriate early usage of a pioneering hospital antibiotic

Submission 3:

Kjt Group by Clare Murphy, Senior Research Associate

Title:

Innovative Patient Adherence Research

Agility Utility: secrets to fast research with lasting impact

If you want to go fast, go alone. If you want to go far, go together. – African Proverb

This often-quoted African proverb is profound and often true... with one exception, Agile research. In our opinion, in Agile research, teamwork and collaboration are the central component of making the research work quickly, AND have far-reaching or lasting impact for brands.

The trend for Agile and Sprint product development is increasing in the pharmaceutical space, and its origins in software present a speed and expectations' challenge to traditional pharmaceutical marketing models, that we all need to be prepared for and adjust to.

To support this shift, the traditional market research approach also needs to change, not by re-inventing the wheel, but by carefully planning the design around two critical factors, partnership and process, right from the research outset, to ensure the research can go both, fast and far.

Partnership

Collaborative partnerships are critical to project success, and a successful Agile research approach typically incorporates the following three to deliver **fast** and **far** research:

Long-term agency/client partnerships (rather than per-project partnerships)

Fast: through saving time in on-boarding; multiple projects can be run concurrently and KPIs and research material structures can be agreed upon at the outset.

Far: agency is up to speed on product strategy and project aims, better able to contextualise findings; learnings are easily transferable from one project to the next and findings are reduced to core essential learnings; 'off the cuff' requests can be accommodated more effectively.

Multidisciplinary expertise (collaboration with in-house or consultant thinkers in behaviour, technology, user experience, or design)

Fast: Experts 'speak the same language' across the entire research chain, reducing miscommunications and streamlining deliverables to fit unique models (e.g. user journeys, RAG maps, heuristic identification).

Far: the number of iterations is reduced by the right expertise at all points in the process; recommendations have been stress-tested through multiple analytical lenses.

Participant collaboration (collaborating directly with respondents and keeping them engaged over the long term)

Fast: recruitment of participants at outset to generate ready panels and/or online communities; reduced need for retrospective analysis due to methodologies with participant interaction.

Far: greater 'customer generated' content and recommendations are delivered, prized by senior stakeholders.

Process

The speed of Agile research requires careful planning and consideration of the research process, specifically in regard to where **compromises** are acceptable or not within methodology selection, fieldwork and analysis, and results.

Methodology selection

Compromise: on the getting the 'why' as the Agile movement is based around behavioural methodologies like observation, eye tracking, digital tracing, social media listening, and developer groups, which rely on knowing 'what' people do and designing to meet their needs rather than knowing 'why' people do what they do.

No compromise: on the reality of the implementation to ensure responses reflect the fast and distracted nature of true use.

Fieldwork and analysis

Compromise: on waiting for the full sample as analysis and feedback happen 'live' throughout the process and small samples are the norm.

No compromise: on the thinking and insight to make sure findings are not lacking depth.

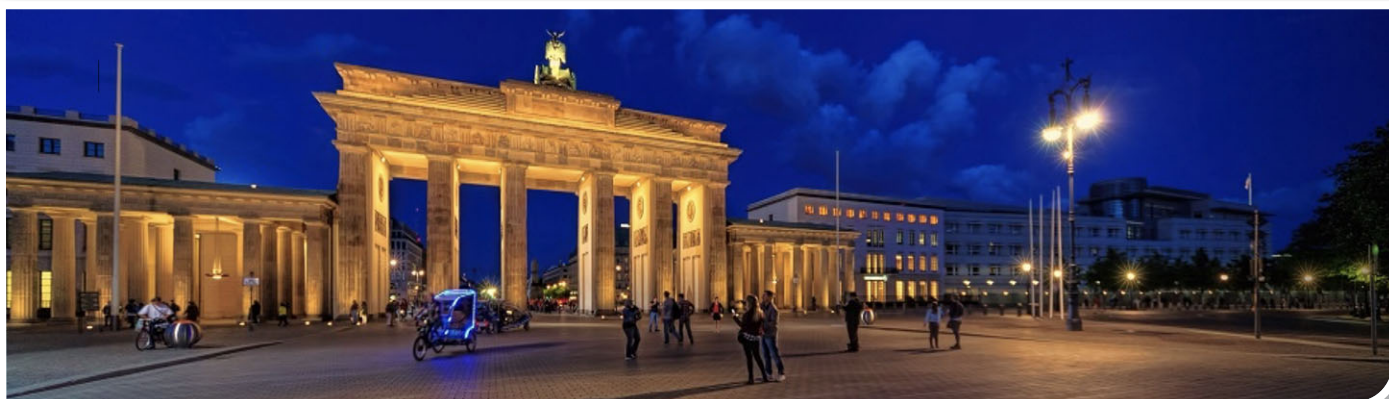
Results

Compromise: on PowerPoint! Traditional report writing is abandoned in favour of delivering dashboards, backroom workshops, email summaries, infographics, sketches or videos.

No compromise: on record keeping, as it's still critical to benchmark and track KPIs, record customer learnings and collate results on a central resource hub.

To summarise, though agility may conjure ideas of 'going alone', being very aligned and 'going together' keeping these considerations top of mind throughout the partnership, can help both, client and agency successfully align with Agile product development approaches without limiting the integrity and impact of critical customer feedback in the process.





The 8th Germany Meeting was convened in Berlin on Tuesday, 26 March and comprised excellent speakers and discussion sessions - a not to be missed day for anyone working in Germany

EphMRA returned to our usual venue in Berlin, the Umweltforum Auferstehungskirche, Pufendorfstrasse, as it offered a great space to network with colleagues and learn from a range of excellent speakers.

There were 5 sessions, featuring an array of enlightening speakers and papers and discussion sessions. The day started with 2 different member forums – one for agencies/suppliers and the other for pharma/healthcare colleagues, which were an opportunity for delegates to raise questions about GDPR which were then discussed during the later session and panel discussion on this highly important subject.

The meeting was held in German, with no translation available into English for delegates.

- **From gamification to creating an immersive experience**

Speakers: Anna Dnes, The Planning Shop & Annalena Lahav, Bayer Pharma

- **'World Café' Session**

Following our 3 innovative papers, this is an opportunity for you to engage in lively,

high energy round table discussions in groups to explore the implications for our

businesses from these papers. What do they mean practice for you?

The event was convened by; Yvonne Engler of Bayer Pharma AG, Katja Birke of Produkt + Markt, Johanna Glaser of Point Blank Research & Consultancy and Janine Ruhl of Sanofi.

Speaker and discussion Sessions:

- **Hidden in plain sight: translating knowledge to meaning**

Speakers: Fenna Gloggnier, HRW & speaker tbc, Bayer.

- **GDPR update and discussion**

This session will provide attendees with an update on GDPR from several

perspectives and will focus on key issues of high importance in our industry:

- Target lists
- Rights of the data subject and documentation

Panellists: Michael Stockmann, Consultant in Data Protection; Gerrit Burghardt, Searchlight.

- **Movimiento – the power of video**

Speaker: Barbara Lang, Point Blank Research & Consultancy

Our Learning and Development Committee (LDC) have been reviewing all the feedback received from delegates at the conference and other EphMRA events about topics of interest for further training and the committee is delighted to be offering 2 workshops at the conference in June on topics which we hope will interest and inspire delegates.

In 2019, EphMRA is offering 2 workshops on completely different topics. Both will be run by fantastic professional speakers, so it will be very difficult to choose which one to attend!

Both workshops will last 4 hours - 12.30 - 16.30 on Tuesday 25th June, with a light lunch being provided at 12.00 for attendees.

Conference Workshop

Increase your impact and influence with Richard Newman

Tuesday 25th June 2019 | 12.30pm - 4.30pm
EphMRA Conference, Warsaw

We are very excited to announce that Richard Newman from BodyTalk will be returning to run a workshop at the 2019 EphMRA Conference. Learn how to speak with more authority and impact, and have a greater influence at work by attending this 4 hour workshop at the 2019 EphMRA Conference in Warsaw.

Workshop objectives

Designed for you to gain a dynamic and persuasive communication style, this workshop will prepare you for those all important meetings, giving you the confidence you need to make a greater impact.

Who should attend

This workshop is aimed at anyone who wants to increase their personal impact at work. Whether you need to improve your pitching, make compelling presentations, or improve day-to-day communication.

What you will learn

You will leave with a more dynamic and persuasive communication style, be able to speak with more authority and impact, and have greater influence at work.

EphMRA



On the day

The interactive workshop will include:

- **Presence, Gravitas and Influence** - gain advanced speaking techniques that allow you to increase your influence at work in all types of situations.
- **Powerful Scripting** - discover the essential elements that all effective business stories must have in order to captivate your audience.
- **Personal Practice and Coaching** - apply everything you have learned to an upcoming event, with an opportunity to practice and gain feedback from your colleagues.

Decide how you will apply everything you have learned in the coming weeks, so that you gain lasting value from the session.

How to register

The cost to attend the workshop is 450 euros. You can only attend this workshop if you are a conference delegate. To register and secure your place on the workshop, please contact

Bernadette Rogers on generalmanager@ephmra.org.

Don't miss out – sign up now. Limited spaces available.

Conference Workshop

Measuring and demonstrating ROI: Building the business impact of insights

Andrew Cannon, GRBN

Tuesday 25th June 2019 | 12.30pm - 4.30pm
EphMRA Conference, Warsaw

EphMRA



ROI – It's a term that we hear a lot in business and one we are hearing more and more used with reference to Insights and Analytics as budgets are either shrinking or expanding. Corporate researchers' ability to measure and promote the significant ROI they provide to their organisations is critical to their ongoing success. Many Insights departments want to be seen as a "strategic consultant" to the business, yet too often the department can be considered as reactive and functional rather than strategic by its internal clients. That's not necessarily because they are; it's due at least in part to so few departments being bold enough to market the value they provide in terms of ROI to their organisations.

So it's not surprising to learn that a joint GRBN/BCG study conducted in 2017 showed that consumer Insights departments that ARE measuring and reporting the ROI of insights are more likely to be seen as strategic business partners, with growing resources, more discretionary budget and a seat at the decision-making table. Insights has the *opportunity* to become the rocket fuel that drives the increasingly consumer-centric decision making environment. We just need to get better at measuring and communicating the ROI of what we do. Against this backdrop EphMRA is pleased to announce that Andrew Cannon, Executive Director of the Global Research Business Network (GRBN), will be delivering this workshop at the 2019 EphMRA Conference in Warsaw.

Read on to find out why you should attend.

On the day

The workshop will be interactive and include round table discussions on concerns, issues and needs. The focus will be on:

- **Discussing the results of the BCG analysis completed prior to the workshop.**
- **Learning the different dimensions of the GRBN framework.**
- **Learning how to get started with measuring your own ROI and demonstrating your business impact.**

Discovering key findings and insights from the latest research-on-research and best practices. In addition EphMRA is pleased to include in the workshop a copy of the GRBN ROI Invest in Insights Handbook.

How to register

The cost to attend the 4 hour workshop is 450 euros. You can only attend this workshop if you are a conference delegate. To register and secure your place on the workshop, please contact **Bernadette Rogers** on generalmanager@ephmra.org.

Don't miss out – sign up now. Limited spaces available.



Could you nudge your brand to success using behavioural economic theory?

Anthony Greenwood

Director, Research Partnership



With behavioural economics theory becoming more widely adopted, especially within the market research sector, terms such as ‘nudging’ have started to enter our vocabulary.

Thaler and Sunstein coined the term “nudge” in their 2008 book of the same name. They defined it as ‘any aspect of the choice architecture that alters people’s behaviour in a predictable way without forbidding any options or significantly changing their economic incentives. To count as a mere nudge, the intervention must be relatively easy to avoid, if required. Nudges are not mandates.

For example, we know that, for a whole range of reasons, people don’t always choose ‘healthy’ food. One reason could be that healthy food occupies poor real estate in the store compared with more profitable or desirable, but unhealthy products like confectionary. To “nudge” people towards making better choices, healthy foods could be placed at eye level on the shelves, so that they can be seen more easily. Alternatively, they could be positioned at the tills, where people make impulse purchases. Banning junk food would not be defined as a nudge, as to do so removes choice and would therefore constitute a mandate to eat healthily.

There are many examples of nudges that have been employed in the public health environment to good effect. For example, the ‘traffic light system’, which appears on packaging to provide information on the level of salt, fat and carbohydrates in the food product, encourages people to make healthier meal choices. The introduction of hand sanitisers on entry to all hospital wards has been credited as one of a number of nudges designed to encourage patients and practitioners to adopt better hygiene, helping to contribute to a decline in hospital-acquired infections.

However, in order to be able to promote a desired behaviour, we need to first understand their ‘choice architecture’ - the biases, boundaries and habits that go into decision-making. Market research is the ideal tool to help understand consumers’ choice architecture, especially in the context of a particular environment or situation. Using our understanding of how people make choices, marketers can identify ways to ‘nudge’ people in that direction.

Nudging in pharma and med-tech

Basic economic theory assumes that humans make rational decisions. We assume this is especially true in healthcare. Surely doctors select the ‘best’ treatment option for a patient based on the evidence to support each treatment, right? Not entirely true. If it were, decisions would be made completely objectively, and there would be little difference

in the decisions made by each individual. We know that this is not the case, and that other issues do come into play. It is our job as market researchers to uncover and use the insights of what these issues are, in order to affect a desired outcome. In instances where clinical data doesn’t necessarily yield a strong competitive advantage, ‘nudging’ provides an opportunity for brands to provide cheaper, less invasive and potentially highly effective ways to move customers from one brand to another.

In a recent study we conducted in wound care, we noticed that physicians, nurses and hospital administrators are all very clearly able to identify differences between various wound dressings, in terms of efficacy, ease of use, cost and applicability for various wound types and locations. However, when we examined the ‘choice architecture’ more closely, we found that a number of other factors influenced what was actually used in practice – such as what was readily available in the facility at that time (a range from different manufacturers are typically stocked), patient insurance, as well as what was physically closest to hand at the time of treatment.

These insights support the argument that clinical data isn’t necessarily the key driver of choice, and that nudges can be created to promote one product over the other. For example, in this scenario:

- Manufacturers could work with Nurses and Materials Managers to ensure that their brand is always optimally positioned in the store cupboard – front and centre - and is easily accessible rather than hidden at the back, which is likely to preclude the dressing being selected on impulse.
- Secondly, they could work with the supply chain to ensure that their brand is always available when required.

‘Nudging’ like many of the principles of behavioural economics, often present simple, yet highly effective, options for influencing behaviour. However, exposing these opportunities requires a deep and comprehensive understanding of the real influences on behaviour.

To find out more, please contact:

anthonyg@researchpartnership.com

About Research Partnership

We are the largest independent healthcare market research and consulting agency in the world. We collaborate with clients from the global pharmaceutical, medtech and biotech industries, providing research intelligence and strategic recommendations that elevate healthcare brands and power their success.

2019 CONFERENCE PROGRAMME

www.ephmraconference.org

Hilton Warsaw Hotel
& Convention Centre
25–27 June 2019



25-27 June 2019

Monday & Tuesday Morning

Key:

Activity	
Presentation session	
Discussion session	
Networking/lunch/coffee break/evening event	
Agency Session	
EphMRA sessions – opening, closing and awards	
LDC Workshops	

EphMRA

2019 Annual Conference

Note: Find your networking Food & Beverage in the Agency Fair, where there will be work stations (tables/chairs/power supply) for delegates to work at.

Monday 24th June

ALL DAY - Committee meetings

Tuesday 25th June

ALL DAY - Committee meetings

Afternoon

LDC Workshops

Lunch will be served at 12:00 in the Workshop Rooms
Workshops start at 12.30 and finish at 16.30

WORKSHOP 1:

Increase your Impact and Influence

Speaker: Richard Newman, BodyTalk



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Who should attend

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What you will learn

You will leave with a more dynamic and persuasive communication style, be able to speak with more authority and impact, and have greater influence at work.

On the day

The interactive workshop will include:

- Presence, Gravitas and Influence - gain advanced speaking techniques that allow you to increase your influence at work in all types of situations.
- Powerful Scripting - discover the essential elements that all effective business stories must have in order to captivate your audience.

WORKSHOP 2:

Measuring and Demonstrating ROI: Building the Business Impact of Insights

Speaker: Andrew Cannon, GRBN



ROI – it's a term that we hear a lot in business and one we are hearing more and more used with reference to Insights and Analytics as budgets are either shrinking or expanding. Corporate researchers' ability to measure and promote the significant ROI they provide to their organisations is critical to their ongoing success. Many Insights departments want to be seen as a "strategic consultant" to the business, yet too often the department can be considered as reactive and functional rather than strategic by its internal clients. That's not necessarily because they are; it's due at least in part to so few departments being bold enough to market the value they provide in terms of ROI to their organisations.

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Workshop objectives

Many companies struggle to realise the full potential of their customer insight function. In order to maintain and grow budgets, we need to do a better job at demonstrating the business impact of insights and measuring the ROI we deliver. This workshop is designed to help you demonstrate this.

Tuesday Afternoon & Wednesday Morning

- Personal practice and coaching - apply everything you have learned to an upcoming event, with an opportunity to practice and gain feedback from your colleagues.
- Decide how you will apply everything you have learned in the coming weeks, so that you gain lasting value from the session.

Fees

There is a fee to attend this workshop of 450 euros for EphMRA members at the early bird fee and includes a buffet lunch at 12.00. To attend this workshop, you will also need to register for the conference.

Who should attend

Whilst the responsibility for measuring the ROI of Insights falls on the clients' shoulders, agency have a huge role to play in supporting their clients achieve strategic business partner status, and by doing it well can achieve their own strategic business partner status with their clients.

If want to talk to your manager about the rationale for attending take a look here at the impact this workshop has had for other organisations:

<https://grbnnews.com/agency-leaders-an-roi-of-insights-events-is-an-effective-way-to-engage-and-deliver-value-to-your-clients/>

What you will learn

The workshop will help you understand that the real ROI is about the impact your insights have on the business and, thus, what your company gets back from the investment it makes in you, your team and your research. You will learn some of the best practices in ROI measurement by those already doing it.

Fees

There is a fee to attend this workshop of 450 euros for EphMRA members at the early bird fee and includes a buffet lunch at 12.00. To attend this workshop, you will also need to register for the conference.

Late Afternoon/Evening

16:30 - 17:15 Comfort Break

17:15 - 18:00 AGM for Full Members

17.15 - 18.15 Associate Members meeting

18:00 - 19:00 Full Members Forum

19:00 - 20:30 Agency Fair & Welcome Cocktail

Open to all members

So that all delegates can circulate around the Agency Fair and enjoy the Welcome Cocktail with colleagues, if you are inviting clients out, please could you do so only from 20.45 onwards.

Morning

Wednesday 26th June

Pre-conference networking in the Agency Fair

Conference opening

Keynote - Plenary 1

Speaker soon to be announced

DISCUSSION PANEL

Keynote - Plenary 2

Title: Losing Sight of Shore

Speaker: Natalia Cohen

Chair: Carolyn Chamberlain, Instar Research

Natalia Cohen was part of the first all-female team to row unsupported across the Pacific Ocean. With no rowing experience prior to applying, Natalia shows how, with a positive mindset, a determined and aligned team, and a sense of humour, you can cross your own personal Pacific. It is an inspirational journey that also has many transferable business implications particularly relating to leadership, teamwork and mental resilience.



Networking break and coffee in the Agency Fair

Wednesday Morning & Afternoon

PLENARY 3

Title: Driving launch success: less can be more in the right channel mix recipe

Speaker: Sarah Rickwood, IQVIA

Chair: Dennis Engelke, Jazz Pharmaceuticals



As the commercial environment becomes increasingly competitive, with success driven predominantly by specialty product launches in the largest developed markets, companies are faced with the challenge of improving launch performance without increasing costs. In order to address this, companies must arm themselves with a best in class commercial model, a key component of which is a fully integrated multichannel approach with digital channels an effective option among these.

Hear how IQVIA analysed hundreds of innovative launches across the top 7 developed markets – the US, Japan and top 5 Europe- to understand which launches were consistently the most commercially successful, and whether those launches used multichannel in a markedly different way to other launches. They compared the use of digital channels for the most internationally commercially successful launches of the last five years using parameters measuring both the quantity and quality of digital engagement.

They find that, across these developed markets, the volume share of digital contacts in the first year following launch for the most successful launches was 64% higher than for less successful launches. Importantly, this digital activity was more often sustained throughout the first four quarters and consisted of a richer mix of digital channels.

This data reinforces the need for more sophisticated and orchestrated customer engagement at launch. Optimising the impact of multichannel is demonstrably the new differentiator for launch success- what are the implications for managing and measuring your commercial model?

PARALLEL 1

EPHMRA 2019 MR EXCELLENCE AWARD PAPER

Title and speakers to be announced closer to conference

PARALLEL 2

EPHMRA 2019 MR EXCELLENCE AWARD PAPER

Title and speakers to be announced closer to conference

PARALLEL 3

EPHMRA 2019 MR EXCELLENCE AWARD PAPER

Title and speakers to be announced closer to conference

PARALLEL 4

Title: Healthcare systems in central and eastern Europe – how to maximise market access in these regions



Speaker: Lucasz Drzazga, SODA

Chair: Erik Holzinger, groupH

This session will briefly present key differences between health care environments in Central and Eastern Europe and Western Europe, and how those differences should be reflected in market research design, harnessed methodologies and fieldwork procedures in order to enhance market access.

The presentation will focus mainly on structure of health care systems (including relevant stakeholders and procedures), but Lucasz will also pay attention to differences between medical specialties that exist in given markets and differences in availability of various – especially novel/ innovative – therapies.

AGENCY SESSION 1

AGENCY SESSION 1

AGENCY SESSION 3

Networking lunch in the Agency Fair

Afternoon

AGENCY SESSION 4

AGENCY SESSION 5

AGENCY SESSION 6

Ethics/GDPR update and round table discussion

Networking break and coffee in the Agency Fair

Wednesday Afternoon & Evening

Forecasting and Data Analytics

PARALLEL 5

Driving Treatment Duration – the segmentation you SHOULD be doing

Speakers: tbc, Novo Nordisk & Craig Radley, KJT Group, Inc
Chair: Xierong Liu

Our speakers will educate the audience on the complexities of treatment duration – the negatives for patients and the costs to manufacturers. They will show a novel technique for identifying the drivers of short vs. Long treatment duration, creating patient profiles, and a case study. This will allow the audience to act in identifying treatment duration drivers for their product and develop strategies to improve revenue and product effectiveness.



Patient centricity in the digital age

PARALLEL 6

Quitting smoking is harder than we knew – deep insights from a consumer consulting board

Speakers: Marianne Fletcher, Pfizer & Magali Geens, InSites Consulting
Chair: Amr Khalil, Ripple International

For consumers/patients trying to quit an addiction to drugs, alcohol and gambling, group and 1:1 peer support has been provided on a global scale for many years. Unfortunately, such structural peer-support is painfully absent for smokers, whose addiction is no less damaging to their health. Notwithstanding an explicit patients-first focus and substantial qualitative research conducted on smoking cessation for over a decade, it took Pfizer to engage in a “research-ready” patient community to deeply understand how much people who are trying to quit are craving for a structural deep emotional connection with fellow sufferers.

Magali and Marianne warmly welcome you to understand better the lived experiences of our participants and how the community delivered mutual value to all stakeholders involved. This methodology should be part of your go to Qual methodologies to understand your patients and do not fear the AE reporting!



Networking break and coffee in the Agency Fair

PARALLEL 7

Title: Telling the whole story. Using data science to quantify brand health from unstructured responses

Speaker: Neil Martin, Ipsos MORI
Chair: Mike Pepp, Blueprint Partnership

Data science offers considerable opportunity to explore and strengthen our understanding of brand perception, with implications for quantitative research in future. Spontaneous brand associations can be a rich source of information on the needs and motivations of HCPs and the patients under their care. The extent and nature of associations coded from unstructured data can also be distilled into trackable KPIs that correlate with traditional measures of brand health. This paper also touches on the work being done to extend these same principles of text analytics to bring structure to responses that have been automatically transcribed from recorded speech.

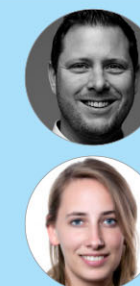


PARALLEL 8

Title: The SMART way to tap into patient emotions – can novel methodologies help understand patient emotions better and faster?

Speakers: Thierry Barten, Pfizer & Janneke van den Bent, SKIM
Chair: Sarah Phillips, IQVIA

Patient complacency? In 2019, that is a thing of the past. Long gone are the days of HCPs prescribing and patients diligently taking their medication. These days, patients claim their rightful role in the driver's seat of their own treatment. This poses a challenge to the pharmaceutical industry – it is no longer enough to only appeal to the rational HCP. Understanding patient needs and emotions is quickly becoming key, but how should we build this understanding? Join our presentation to learn how!



PARALLEL 9

Title: Forecasting and Data Analytics round table discussion

Facilitators: Ben Collins, Boehringer Ingelheim and Erik Holzinger, groupH

At the conference in Basel, delegates enjoyed a lively and informative discussion about ‘hot topics’ in Forecasting and Data Analytics. Join colleagues in Warsaw for another round table discussion which will be designed to inspire and inform you about these very important issues in MR/BI. There will be plenty of opportunity to discuss and engage with colleagues during this session.

PARALLEL 10

Title: What can 18 patient insights inspire us to think differently about the future?

Speakers: Mohamed Akrouf, F. Hoffman-La Roche & Roberto Cortese, Elma Research

By following the footsteps of a small cohort of rare patients in real time, we go on a journey seeking need-oriented and insight-driven changes the industry can aspire to and deliver. Empowered by a longitudinal qualitative design and a combination of innovative digital tools and traditional MR techniques, we put ourselves in the shoes of our patients and see the world through their eyes as their first experience with a new treatment unfolds. Diving deep into the patient experience, we uncover insights that help us to really move beyond just delivering the treatment.



Thursday Morning & Afternoon

PARALLEL 11

Title: Reinventing healthcare (patient) relationships using AI chatbots

Speakers: Sharon Paik & Kathryn Schmitz, Cognitive Consulting and Candace Anderson, Radius Health
Chair: Jill Wilson, OSG

Modern consumers want fast, easy access to information and they want their interactions to be engaging and personal. The healthcare industry is no exception. Yet continually rising costs, disparate systems, and a lack of patient engagement currently afflict the industry. The prescription is simple: digitization, neural network integration, and bots.

The richness of information nowadays would be impossible without automation. The recent evolution in data science is artificial intelligence and machine learning, which changed our relationship with data. And using chatbots will be one of the most effective ways we'll be able to deliver healthcare content in the future.



Evening event and EphMRA 2019 President's Awards – STIXX Bar

Morning

Thursday 27th June

PLENARY 4

Title: The Promising Future of Business Intelligence within the Pharmaceutical Industry

Speaker: Ana Perez, AbbVie

Panellists: Richard Hinde, Norgine + other panellists tbc

Chair: Letizia Leprini, Bayer



Different perspectives exist on the role that Business Intelligence (BI) will play in the future of the pharmaceutical industry.

Will increasing industry and business complexity drive more specialist roles in the BI function or will the need for a broad role with a holistic view persist?

What activities will be central to the role of BI and where will projects in RWE, digital, social media, AI etc. sit in the future?

In this session and the panel discussion which will follow, you will be able to listen to different perspectives and give your input in order to make your mind up and decide which pathway you would like to take to achieve this promising future for Business Intelligence.

Panel and Audience Discussion

Join Ana, Richard Hinde from Norgine and other panellists to discuss Ana's scenarios for the future to see where you think the industry is heading. This session promises to be lively!

PLENARY 5

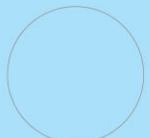
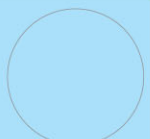
Title: Powering seldom-heard patients to improve healthcare: Lessons from research and engagement with cancer patients from diverse minority groups

Speakers: Marie-Claude Gervais, Versiti and Shae Eccleston, Patient

Chair: Xierong Liu

Individuals, organisations and businesses are searching for new strategies to increase their effectiveness and improve people's health and wellbeing. Letting go of traditional 'top-down' models in favour of approaches that 'repower' patients, widen access to knowledge, support better health decisions and broaden participation in service design can all be effective, under the right conditions.

This session draws on a project that sought to understand and address cancer inequalities among people from minority ethnic backgrounds, LGBT people and older people. The project involved 90 cancer patients from these seldom-heard groups in articulating their own experiences and unmet needs, guided by researchers in collaboration with healthcare professionals and diversity specialists, in a digital environment, to help co-create better services. One participant in the project talks about the experience of taking part and the long-term impact it has had on her health, her life and her longer-term commitment to use this 'repowering' experience to help improve cancer services for all. We also explore what are legitimate expectations and adequate support structures for patients who are prepared to use their lived experience to help.



Networking break and coffee in the Agency Fair

PLENARY 6

Speaker soon to be announced

PLENARY 7

Speaker soon to be announced

Thursday Afternoon

AGENCY SESSION 7

AGENCY SESSION 8

AGENCY SESSION 9

Networking lunch in the Agency Fair

Afternoon

AGENCY SESSION 10

AGENCY SESSION 11

AGENCY SESSION 12

Trends

PARALLEL 12

Speaker soon to be announced

Implicit Associations & Behavioural Science

PARALLEL 13

Title: Implicit insight into prescribing in relapsed and refractory Multiple Myeloma

Speakers: Simon Ball, Celgene & Pamela Walker, Incite

Chair: Mike Pepp, Blueprint Partnership

In increasingly competitive and saturated markets in the pharmaceutical industry, there is a need to gain deeper insights into physician decision making that goes beyond traditional market research techniques. This self-funded study in relapsed and refractory Multiple Myeloma will showcase an innovative technique using implicit testing that measures non-conscious associations with different treatment combination regimens. This paper will explore the value that implicit testing adds to more traditional explicit evaluation and what this means in terms of considerations and commercial opportunities for pharma and marketers looking to develop or grow their brand.



PARALLEL 14

Title: Agile Research: Buzzword or Game-Changer?

Speakers: tbc, M3 Global Research & tbc, Research Partnership

Chair: Amr Khalil, Ripple International

Introducing agile qualitative and quantitative research for healthcare market research. Combining online quant with the immediacy of follow-up qual for deep insight, we'll demonstrate how the industry can offer a new approach with a fast turnaround. Aiming to disclaim the age-old adage of whether a product or service can be high quality, good value and delivered quickly our speakers will look critically at the results of a real-life case study of a project executed by both companies, comparing and contrasting the effectiveness of agile approaches with traditional methodologies.

PARALLEL 15

Title: Beyond Behavioural Economics – a fully integrated view of behavioural drivers

Speaker: Peter Simpson, Segmedica, Inc.

Chair: Viv Farr, Narrative Health

Enough is now known about the human mind to totally revolutionise the way we design and interpret qualitative and quantitative market research. This session combines known science with case studies to demonstrate how to use an integrated approach to brain science to take research to a level way beyond the use of single tools such as Behavioural Economics

Peter's case studies will cover market segmentation, ad concept testing and the use of linguistics to segment a very small sample in an orphan disease

Bring your natural curiosity to this session and be prepared to look at research in a whole different way.



Networking break and coffee in the Agency Fair

Discussion

This discussion will focus on trends in our industry which our speakers have highlighted in their papers and will allow delegates the opportunity to engage with colleagues and the speakers to look at the practical implications of these trends on your business.

Discussion

Title: Rising to the challenge

Speaker/panellist: Sam Hope, Blueprint Partnership

Chair: Carolyn Chamberlain, Instar Research

Hear the results of an experiment which Blueprint have conducted, which sought to identify the natural prioritisations, shortcuts and omissions we make when recalling the past, to challenge our respondents, clients and ourselves. There will be plenty of opportunity for discussion with the speakers in this BE stream of papers and we expect this to be a stimulating session.



PLENARY 8

Speaker: Tom Cheesewright, Futurist

Conference Closing session - note that the conference closes at 16:30

Thanks to our Steering Committee for 2019

EphMRA relies on the expertise and dedication of our Steering Committee to ensure that the annual conference provides all delegates with great insights and opportunities to network with colleagues from all over the world. Our Committee is already starting to work on the programme for 2018 and will meet in October to discuss.

the submissions which will have been received over the summer.

Our Steering Committee comprises of the following people from Agencies and Healthcare companies and EphMRA wishes to thank all of them for all their hard work in advance and during the conference.



Carolyn Chamberlain

Business Unit Head
Assure BrandPanels - UK



Letizia Leprini

Customer Business Insights
Bayer Pharmaceutical
Division - Switzerland



Mike Pepp

Account Director
Blueprint Partnership - UK



Xierong Liu

Director
Elma Research - UK



Vicky Burke

Director of Client Services
Fieldwork International - UK



Erik Holzinger

Managing Director
grouph - UK



Katy Irving

Research Director
HRW - UK



Sarah Phillips

Senior Principal
IQVIA - UK



Dennis Engelke

Director
Jazz Pharmaceuticals - UK



Viv Farr

Managing Director
Narrative Health - UK



Jill Wilson

Global Qualitative Leader
OSG - UK



Tracy Machado

Director
Pheonix Healthcare - UK



Amr Khalil

Managing Director
Ripple International - UK



2019 EphMRA Conference Sponsorship Opportunities

25-27 June, Warsaw



Sponsorship Opportunities Available

Conference App	
Conference Centre WiFi password	
Branded Social media wall	
Branded Mobile charging station	
Branded 4m x 2m banners in the main plenary/ Agency Fair room (3 remaining)	
Large branded sticker on the front window	
Digital Signage	
Large footprint floor stickers	
Large branded sticker on the front revolving door	
A5 pad	

Sponsorship Opportunities - **SOLD!**

Reusable water bottle and water stations SOLD! M3 Global Research	
Delegate badge SOLD! IGV Marktforschung GmbH	
Delegate badge lanyard SOLD! Ipsos Healthcare	
Registration desk and lecturns SOLD! SurveyHealthcare (SHC)	
Delegate bag SOLD! GLocalMind	
2m x 4m banner in the Agency Fair/Plenary room 1 SOLD! Segmedica	
Photographer SOLD! Research Partnership	
A5 pad – SOLD! Ripple International (multiple sponsors allowed)	

Please contact Caroline Snowdon at events@ephmra.org for more details about any item.
Go to the EphMRA Conference website for a downloadable pdf about all the items which can be sponsored - <https://www.ephmraconference.org/sponsorship/>

2019 Conference - Venue:

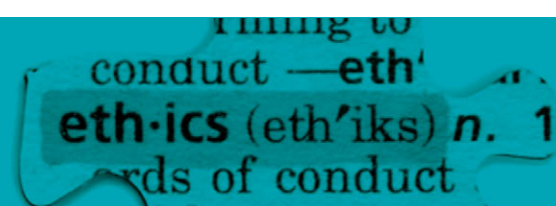


Having held our annual conferences over the past few years in conference centres, where delegates have to stay in local hotels, we are for 2019 returning to a venue where you can enjoy the conference and stay on site overnight. This means minimal travel and an even greater opportunity to network with colleagues beyond the

conference hours. Warsaw is a unique venue, offering wonderful cultural sites, as well as great business opportunities.

Our venue for the 2019 conference is:
The Hilton Warsaw Hotel and Convention Centre,
Grzybowska 63, Warsaw, 00-844, Poland

Ethics Update



Code Consultation opened until 15 March 2019 – thanks for all the input received

EphMRA is dedicated to continuously developing the Code of Conduct. Members provide us with a lot of comments and feedback on the Code, which is very welcome, as it helps us with this development.

To enable the Ethics Committee to be able to give the comments received due consideration we are opening the Code Consultation period. In preparation for the 2019 update all members were invited to submit comments until 15th March 2019.

The Code update is now being aligned with the membership year and will no longer be launched in January, but in October.

This is the only period when you can submit your comments, as immediately after this, we will be working on a revised and updated Code of Conduct.

The Ethics Committee have reviewed your feedback and will take it in to account as far as is practical and appropriate within the updated Code.



Incentives Overview

COUNTRY DIFFERENCES AND SUMMARIES
BY MARKET

PUBLISHES JANUARY 2019

Contents

General points	4
EphMRA Code of Conduct	4
Incentives	4
Incentives – Country Exceptions	4
Free Prize Draws	5
Incentives – Country specific Information	5
Explanation of terms	5
Countries	6
Brazil	6
Interfarma (Association of the Pharmaceutical Research Industry) Code of Conduct	6
Canada	6
The Marketing Research and Intelligence Association (MRIA)	6
Denmark	7
ENLI the Danish Ethical Rules for Promotion of Medicinal Products towards Healthcare Professionals	7
Finland	7
Pharma Industry Finland Code of Ethics Pharma Industry Finland 2017	7
France	8
2019 FIMM/IFPMA (represents the pharmaceutical industry as well as national associations worldwide)	
Code of Practice	8
LEEM	9
Germany	10
2017 FSA Code of Conduct on the Collaboration with Healthcare Professionals	10
2017 ADM Code of Conduct Guidelines for Studies in Public Health Service (currently undergoing review)	11

Greece	11
2014 SFEE Code of Practice on the Relationship between pharmaceutical companies and patient organizations	11
Italy	12
2013 ASSIRIM PHARMA GUIDELINES	12
FARMAINDUSTRIA refers to the EFPIA HCP CODE and to the IFPMA CODE	12
Japan	12
JMMRG Japan Medical Marketing Research Group	12
Japan Marketing Research Association (JMRA)	12
Korea	12
KRPIA Code of Fair Competition in Pharmaceutical Trade 2014	12
Mexico	13
AMIIF and CETIFARMA Codes of Conduct	13
The Netherlands	13
CGR Code of Conduct for Pharmaceutical Advertising – extracts	13
Norway	18
LMI marketing of pharmaceuticals	18
Poland	19
OFBOR - Polish Association of Market and Opinion Researchers ?	19
Russia	19
Spain Farmaindustria	19
Code of best practices 2016	19
Sweden	21
LIF Swedish Association of the Pharmaceutical Industry (LIF) and the Association of Representatives of Foreign Pharmaceutical Industries (RUF)	21
Turkey	22
United Kingdom	22
BHBIA Legal and Ethical Guidelines for Healthcare Market Research	22
USA	24
CASRO - Code of Standards and Ethics for Market, Opinion, and Social Research	24
Insight Association	24
The Physician Payments Sunshine Act	24
The Pharmaceutical Research and Manufacturers of America (PhRMA)	24
International Scenario	26
ESOMAR guidelines	26
Medicine for Europe Code of Conduct	26
European Federation of Pharmaceutical Industries and Associations (EFPIA)	26

Please log into the members area of the web site to find the update document about the type of incentives you can offer country by country. It's an easy to reference guide.

At the 27 February London meeting updates were given on:

Changing the framework for research? Impact of the GDPR on healthcare market research

and

Brexit: What we really know will change? International Transfer of Personal Data • EU representative One stop-shop mechanism.

practice instruction Training mentor advising

Learning & Development Committee

How you and your company can benefit from joining the LDC:

There are several ways you and your company can benefit from being a member of the LDC

- Shaping the industry with best practice, new insights, and innovative ideas
- Access to speaking opportunities for your company at webinars, masterclasses
- Sharing knowledge with other EphMRA members
- Meeting people from the industry outside your own company

Who we are

Marcel Slavenburg

SKIM - Netherlands

Alexander Rummel

Aurum Research - Germany

Chetan Taylor

Branding Science - UK

Jayne Shufflebotham

IQVIA - UK

An-hwa Lee

Research Partnership - UK

Jana Rueten

M3 Global Research - UK

Cristiana Carata

Instar Research - UK

Time investment – overview

- Telecons every 6-8 weeks (one hour call)
- Planning, developing and hosting a member's webinar (approximate investment ~2 calls with conveners prior to the webinar)
- Planning, developing and convening a masterclass at conference (approximate investment 2-3 calls with conveners prior to the masterclass)

EphMRA Vision

Creating excellence in professional standards and practices to enable healthcare market researchers to become highly valued business partners.

What we do

Your role on the committee will be to help ensure that our training initiatives actively encompass the needs of many member types and to give input on how best we can meet training needs in today's industry.

The LDC 'meets virtually' every 6-8 weeks to discuss and plan training initiatives for the year and evaluate past training feedback.

We are offering:

- Webinars (skills and knowledge based)
- Masterclasses (formerly 'workshop') at the annual conference
- Online learning material and publications

Each of the webinars/ masterclasses is hosted by one or two of the LDC members; this includes:

- Brainstorming potential ideas and putting together webinar schedule
- Identifying speakers;
- Reviewing training material from speakers;
- Hosting webinars/ masterclasses which mainly includes the introduction and moderating the Q&A;

Objectives

EphMRA's overall aim: To create an environment that encourages excellence in providing insights combined with business knowledge.

1. EphMRA is the hub for excellence in research thinking to empower healthcare market researchers to provide consultancy to the business.
2. Driving the development of best practice in healthcare market research.
3. Delivering training and opportunities for best practice exchange for healthcare market researchers to develop their understanding of business problems and strategic issues that allows them to provide clear, actionable insights.

Excellence means that EphMRA is setting the gold-standard in healthcare market research and the Association will continue to build excellence by providing training that relates to the strategic components of market research. Furthermore EphMRA will provide guidance to its members to attain the Association's most current standards of excellence and ethical guidelines.

The Association plans its direction and activities according to the Strategic Plan formed by the Executive Board and published in 2013.

JANUARY 2019



EphMFA

www.ephmra.org

Log into the members area of the web site to find updates from the Classification Committee.

Updates from the EphMRA/Intellus Classification Committee Meeting: Basel 25th -26th June 2018 2019 ATC Developments

The following new class structures were voted on by EphMRA/PBIRG in May/June 2018 and agreed in principle. These structures will now be used in the next part of the development process which is the detailed refinement of the rules.

Please note that these new structures are provisional at this time. The 2019 codes, descriptions and Guideline text will be finalised and published by the Committee at the end of 2018. The new structures then come into effect from the beginning of 2019.

Each year in May the EphMRA/PBIRG Classification Committee contacts all Pharma members of both associations to ask for their vote on the proposed changes to the classification structure, for example, new classes. These new classes, if agreed, are then available for use in the following January.

If you are a pharmaceutical company with a number of products on the market or in the pipeline, then changes to the classification structure are a vital part of your strategic planning.

Every year a significant proportion of Pharma members do not return their votes.

Why vote?

Pharmaceutical products are grouped into categories in secondary audits according to the EphMRA / PBIRG Anatomical Classification System - voting ensures that all companies get a chance to ensure these are the right new classes as they can affect a number of pharmaceutical companies.

How are the new classes created?

Proposals for new classes are carefully reviewed by the entire Committee. The Committee consults with appropriate involved member companies and sometimes with medical opinion leaders to gain input and refine the initial proposal.

The Committee finalises the proposal and it is sent out to the full EphMRA / PBIRG membership for voting in the second quarter of the year.

How does the vote work?

Eligibility:

- Only Full (Pharma) Members of EphMRA or PBIRG may vote.
- Each member company is entitled to one vote. If a company has membership of both EphMRA and PBIRG then one vote is allowed between them.
- A 'company' is defined as a corporate entity. In other words, there is one vote per corporation, regardless of the number of affiliates or subsidiaries (unless any are separate corporate entities).
- Proposals need the approval of a 2/3 majority of the voting companies to be passed.
- If a 2/3 majority is not reached, a second count is made of interested/involved companies.
- If 2/3 of the interested/involved companies approve, the class is approved.



Process:

The vote is completed online and an email is sent to companies with the relevant link. This method was introduced last year and has proved to be much quicker to complete than previous methods.

You can abstain on individual proposals. This means that you have the flexibility to vote yes or no in an area in which you are involved, and abstain in another area.

What do I have to do as the Pharma company contact for EphMRA/PBIRG?

- In advance of the May vote, identify and nominate the person in your company who will progress internally and then finalise the vote.
- If you wish, you can provide EphMRA with the email address of the nominated person and we can ensure the voting email and information go to both of you.
- Look out for the voting email alert which comes out in May.
- Ensure your company registers its vote.



Research Partnership continues to expand its market access service, Access Partnership, by welcoming Boon Yap to the team, which now comprises 4 specialists, led by Director Brett Gardiner.



AURNI extends reach of its ISO 20252-certified marketing research quality management services with the addition of Tokyo-based, healthcare marketing research specialist AMP Research to its member network. Learn more: www.aurni.com



OPEN HEALTH

The EarthWorks, the market research arm of OPEN Health, is merging with communications agencies LEC and Reynolds Mackenzie, creating OPEN Health PBC, offering insight expertise in patient and brand communications.



At the Heart of Brand Performance

Cristiana Carata née Artenie joins P\S\L Group as Director for Instar Europe, a role that will see her strengthen and develop new key relationships with European pharmaceutical companies.



