



2009 ANNUAL NATIONAL CONFERENCE

MARCH 8 - 10, 2009
WYNN LAS VEGAS



**MAXIMIZING
BRAND POTENTIAL
IN A VOLATILE
MARKETPLACE**

The background of the entire image is a collage of pharmaceutical and financial symbols. It includes several syringes of varying sizes, a green 3D bar chart, a green line graph showing an upward trend, and a magnifying glass with a black handle. The background is a dark blue color with faint, semi-transparent text of various pharmaceutical company names and stock market data.

A New Paradigm for Brand Tracking: Re-Defining the Client-Agency Relationship and the Market Model

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TNS Healthcare is a Kantar
Healthcare company.

Agenda

- ATUs on the Value Chain
- From Data Dump to Actionable Insights: On to a new Client-Agency Paradigm?
- The Conceptual Framework: A Holistic Market Model
- The Role of Commitment in ATUs
- Summary and Conclusions



Definition of ATU

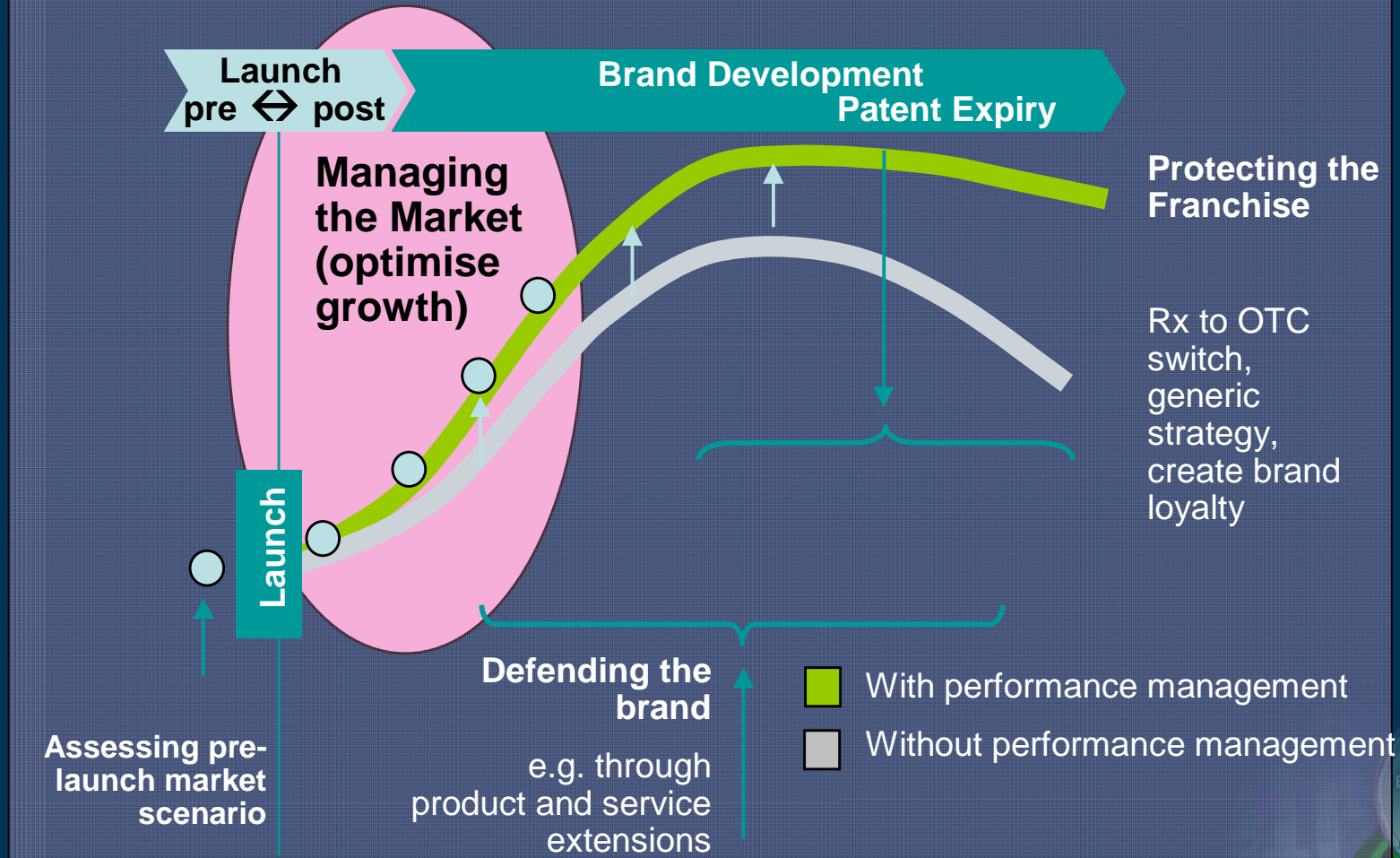
- ATU = “Awareness, Trial and Usage Study”
- aka **Usage & Attitude Survey (U&A)**
- ESOMAR definition: *Research projects that aim to describe users (and non-users) of a product, together with their attitudes towards the product.*¹
- Measures brand health, often in comparison to competitive brands
 - point-in-time market snapshot
 - periodic tracking study

¹ – Source: ESOMAR Glossary (<http://www.esomar.org/index.php/glossary-u.html#U&A>)



Underlying Business Need of ATUs

Product Life Cycle Management



Value Proposition

Routinely track
business
indicators...



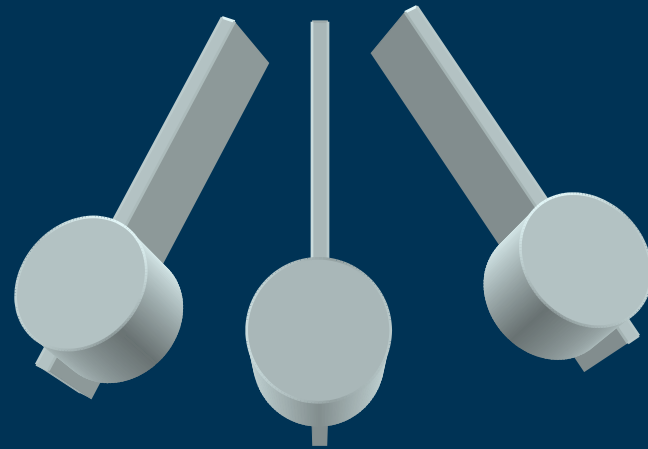
...OR: Also used
to inform
strategic
decisions.

Question for You

Which Level of Service Do Pharmaceutical Companies Demand in ATU work?

Field & Tab	<input type="checkbox"/> 1
Methods & Findings	<input type="checkbox"/> 2
Complex Methods with Explanations	<input type="checkbox"/> 3
Proprietary Methods, Business Insight	<input type="checkbox"/> 4
Advice and Problem Solving	<input type="checkbox"/> 5

So, are ATUs a commodity or value-add service?



Field and Tab

Methods and Findings

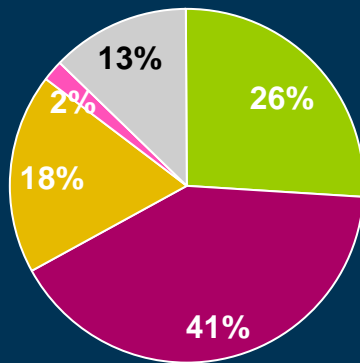
Complex Methods with Explanations

Proprietary Methods, Business Insight

Advice and Problem Solving



Future Requirements by Pharma Clients



To the right:
67%

Requirements will move...

- Strongly to the right
- Slightly to the right
- Not change
- Slightly to the left
- Strongly to the left
- N.A.



Field and Tab

Methods and Findings

Complex Methods with Explanations

Proprietary Methods, Business Insight

Advice and Problem Solving

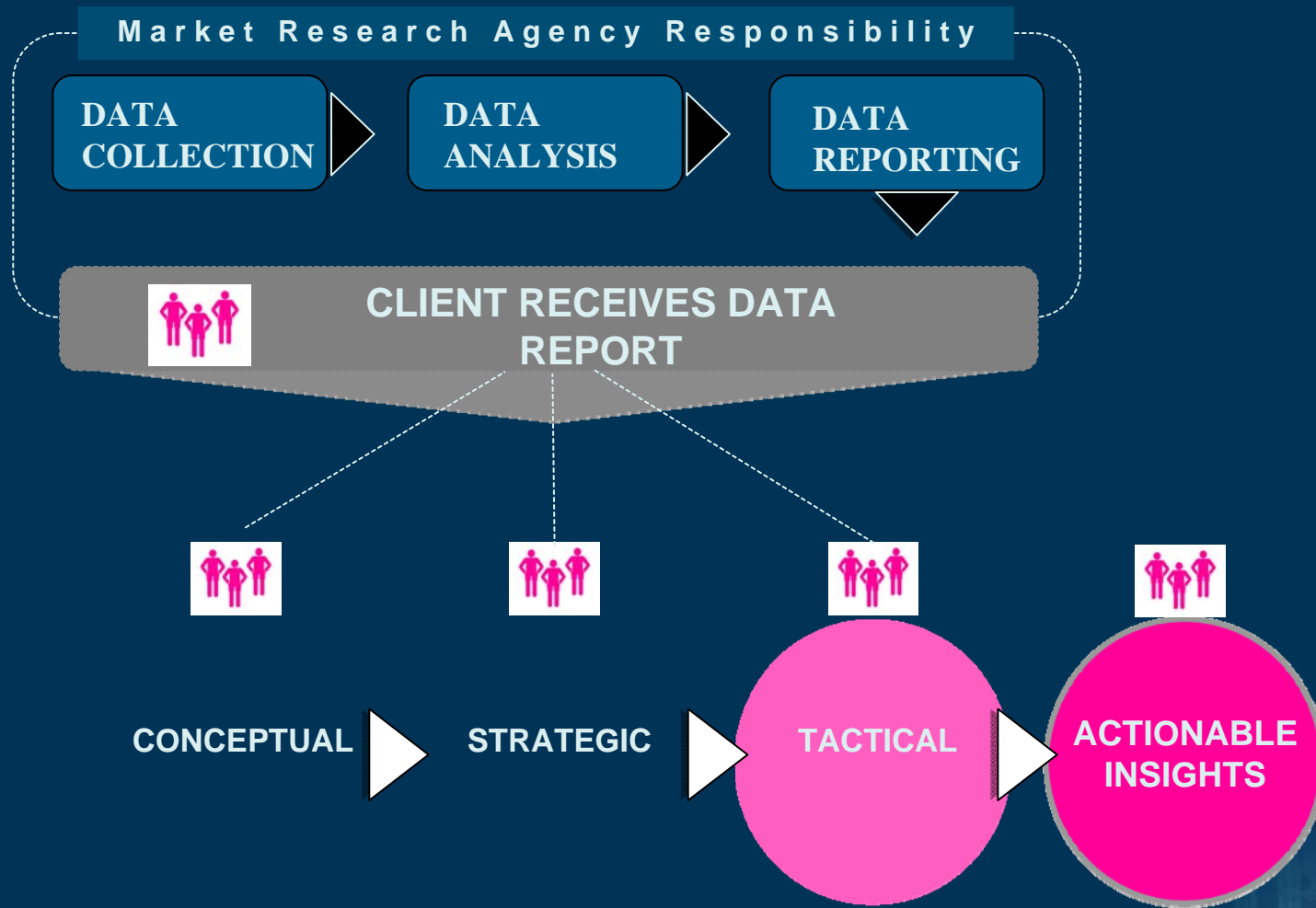


Source: International Customer Satisfaction Survey, TNS 2007 (n=140)

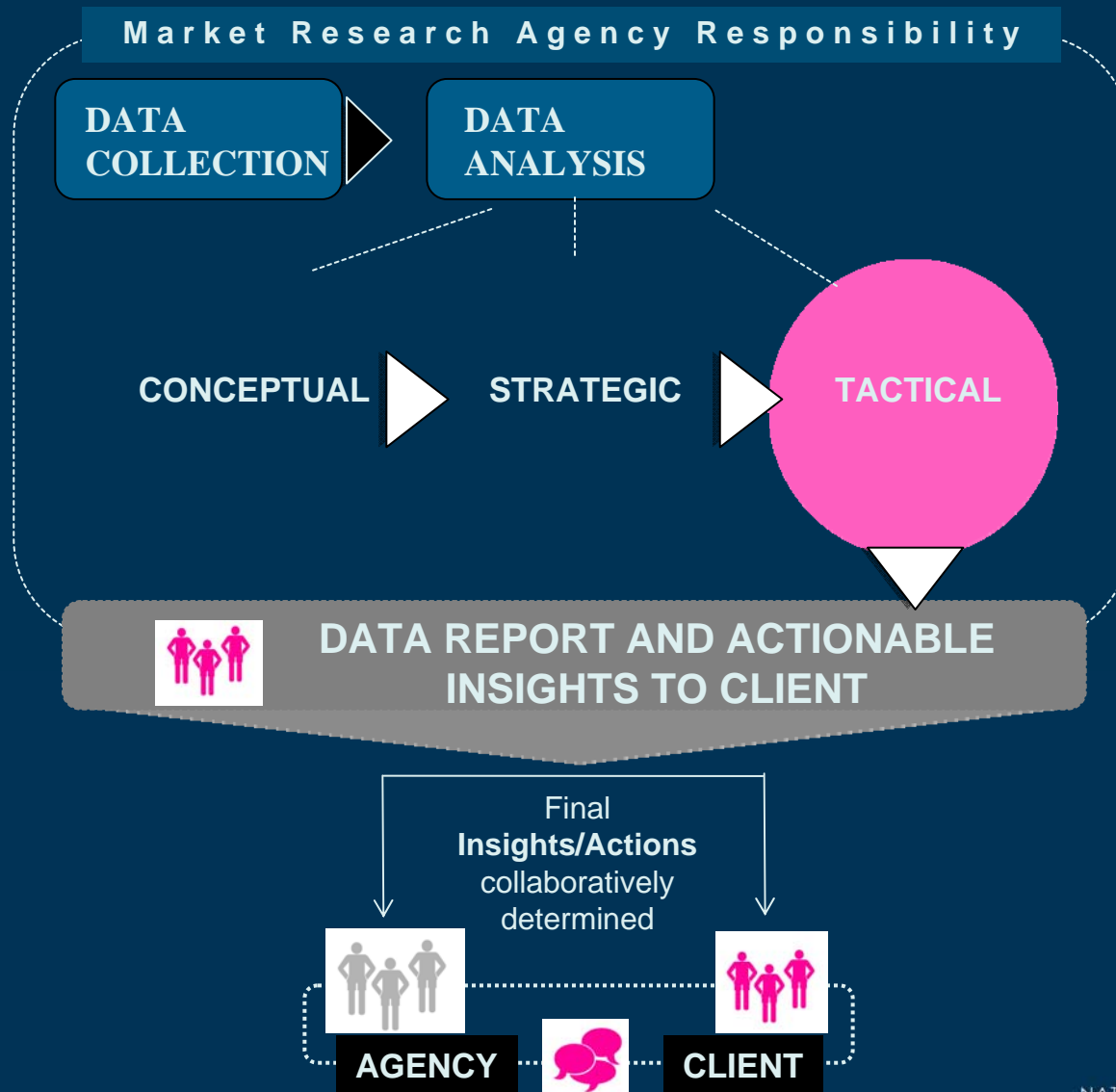
How do we meet the challenge to move toward advising and consulting?



Market Research: Traditional Roles and Responsibilities



Beyond the Findings: Creating Actionable Insights



The Agency-Client Relationship

- Value-add through increased collaboration of client and agency.
 1. Start with **business** needs
 2. Focus on solving problems
 3. In sum, be a **partner**

Holistic Brand Model

- Need: Input from...
 - Market Research
 - Brand Management and Marketing
 - Sales and Sales Effectiveness
 - Market Access, Pricing & Reimbursement
 - Etc.
- Early input ensures
 - accuracy,
 - relevance,
 - credibility.



A holistic model considers various stakeholders internally and externally

- Objective: Relevance, value and credibility increase with a holistic view
 1. Joint planning to bridge (break down) silos
 2. Know the internal clients to understand external stakeholders



Before setting project objectives, seek input from those who will use the ATU data... to make the research more relevant, valuable, and credible

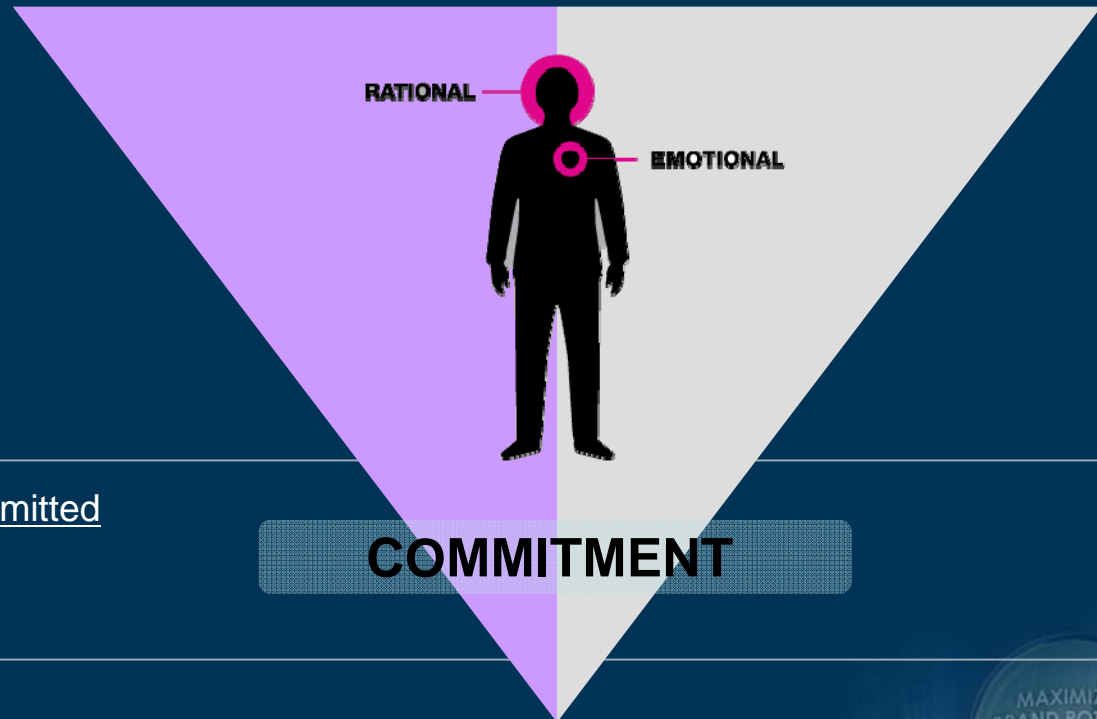


Conceptual: To Produce Business Results in Complex Market Environments.

1 Successful brands engage customers...



2 Satisfying rational and emotional needs



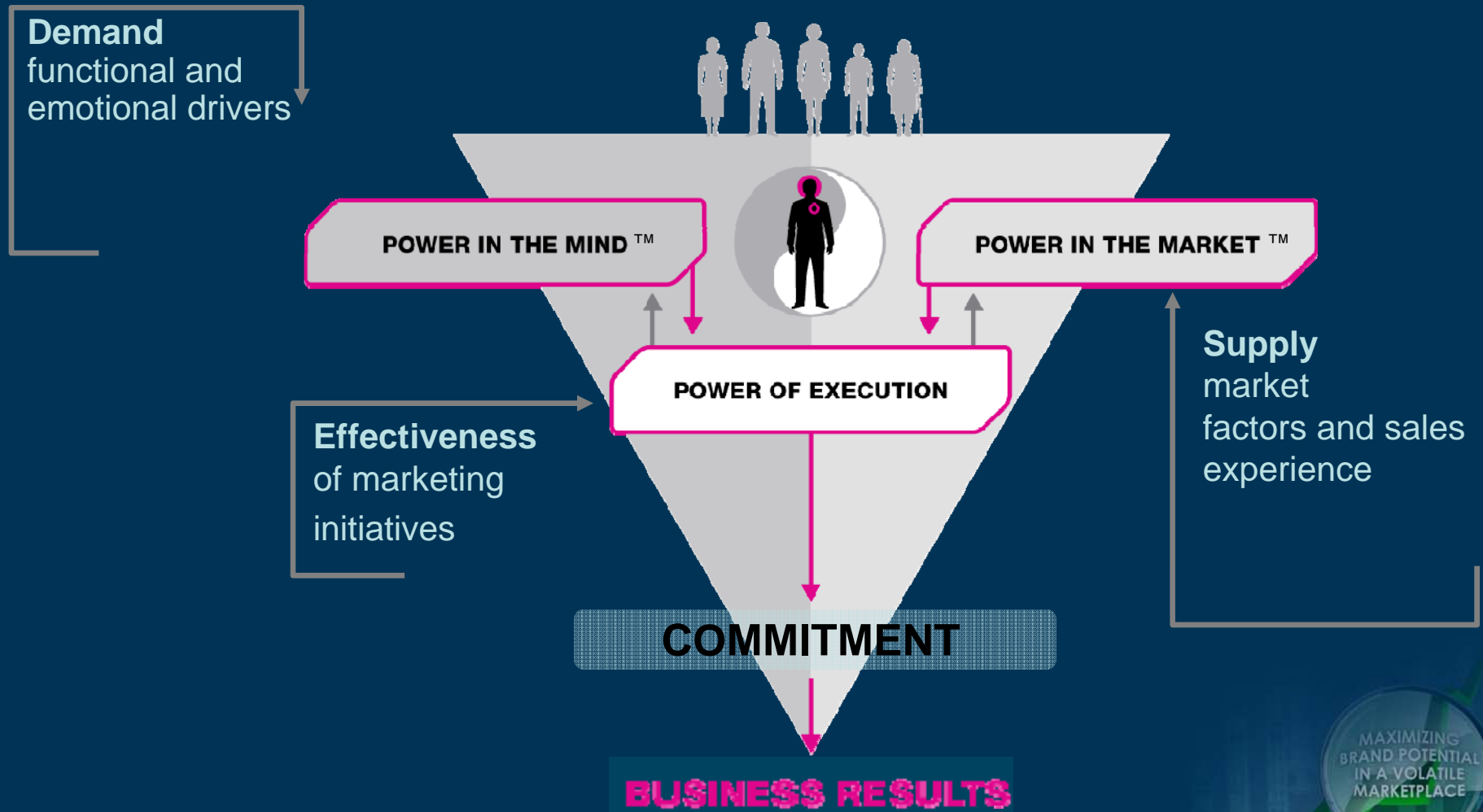
3 Creating a strong base of committed customers

4 To drive business results

BUSINESS RESULTS



Business Success as Result of Interplay of Three Factors.

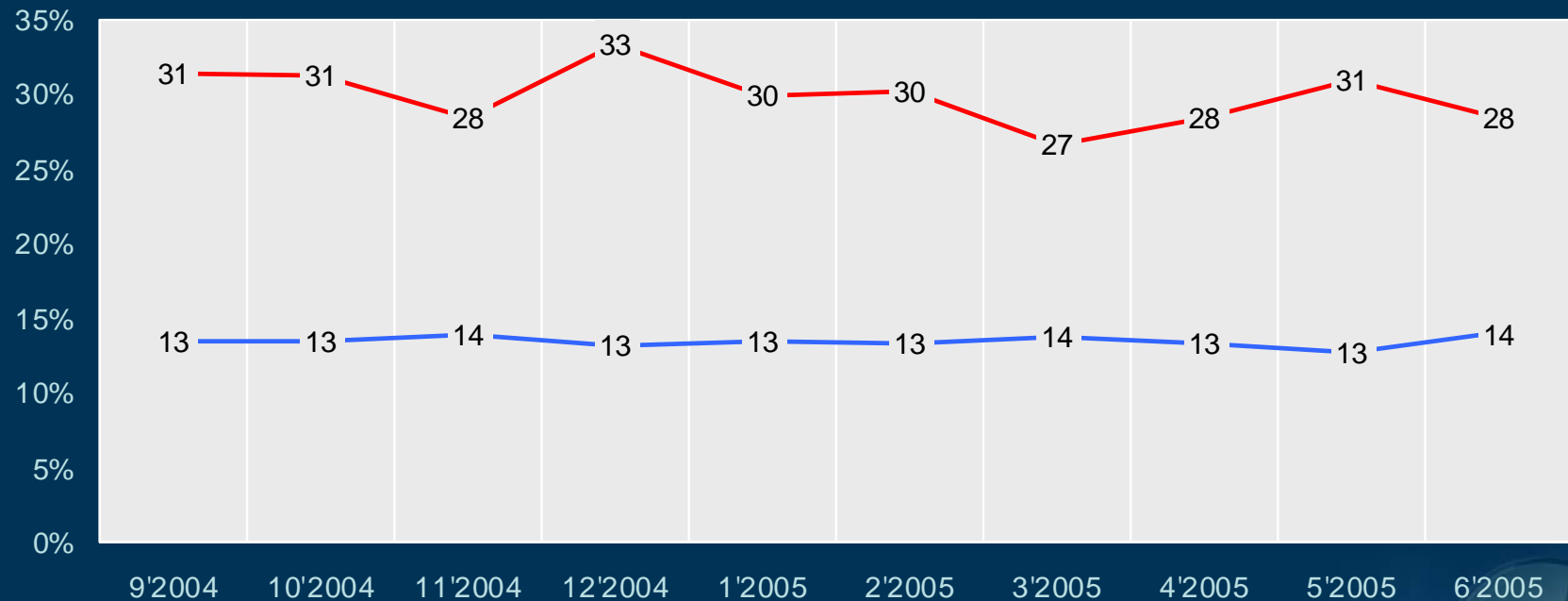


The Importance of Commitment:

Brand-Committed Prescribers Write Significantly More Scripts and Are Less Susceptible to Brand Switch

Validation against actual physician level Rx
Brand share by commitment segments

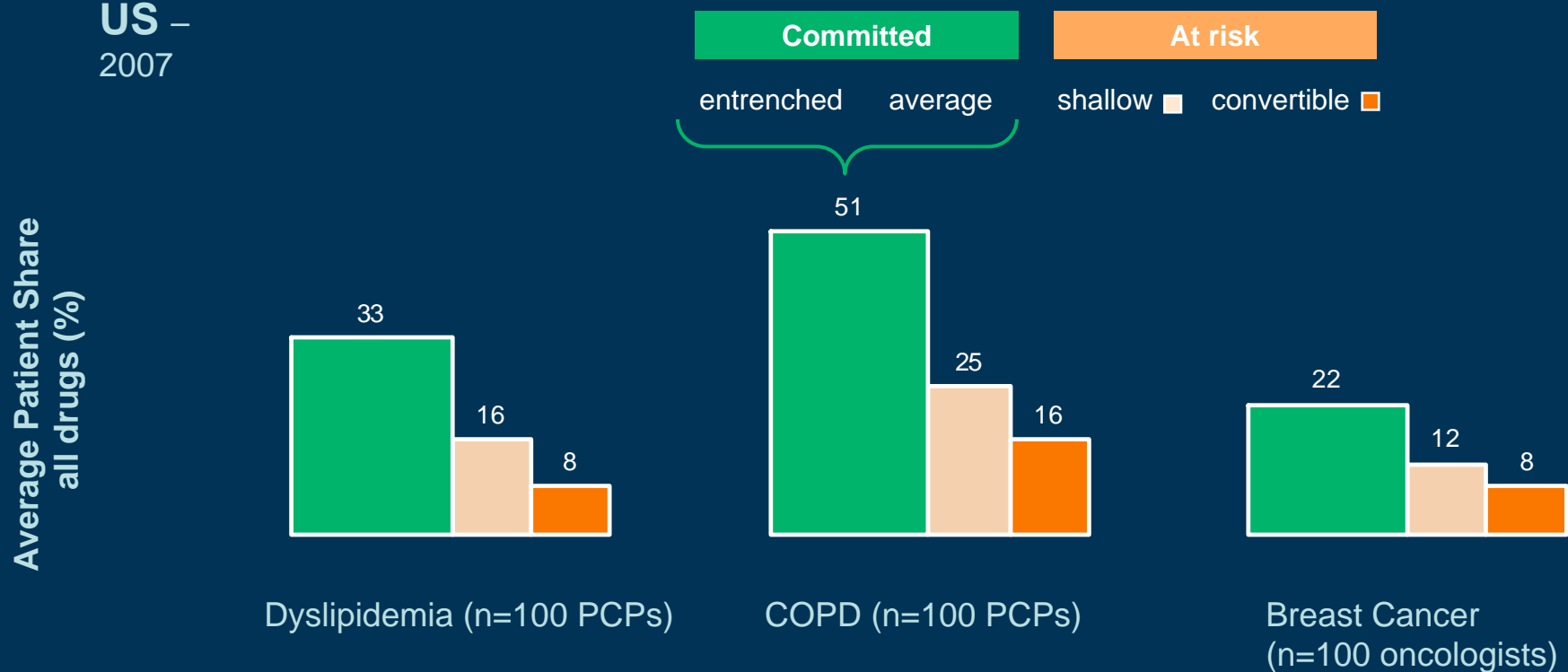
— for committed prescribers
— for prescribers at risk



Source: Conversion Model™ Validation Study 2005 – ARB Market
(TNS Healthcare)

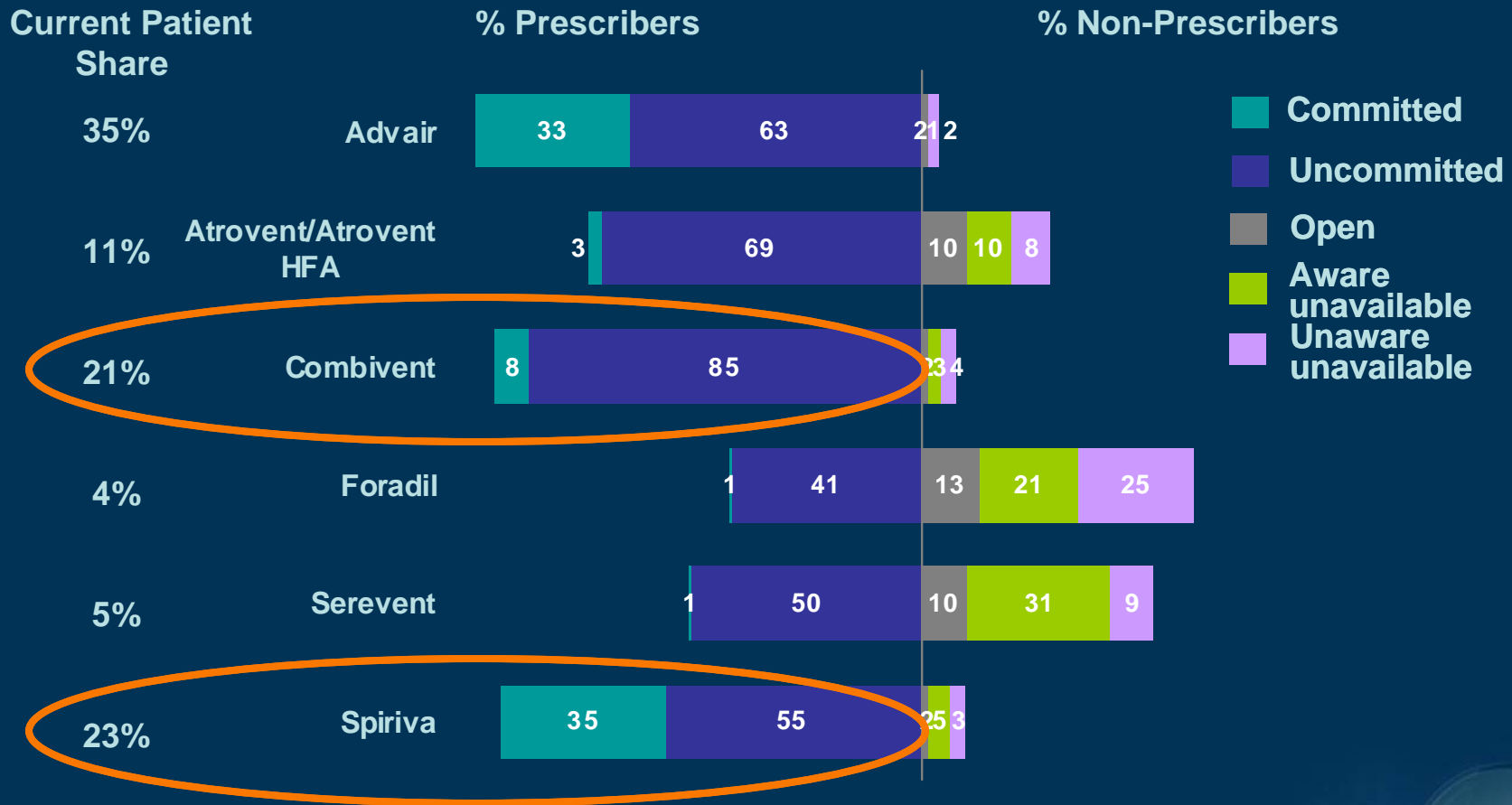
Committed Prescribers Are 2-3 Times More Productive.

US –
2007



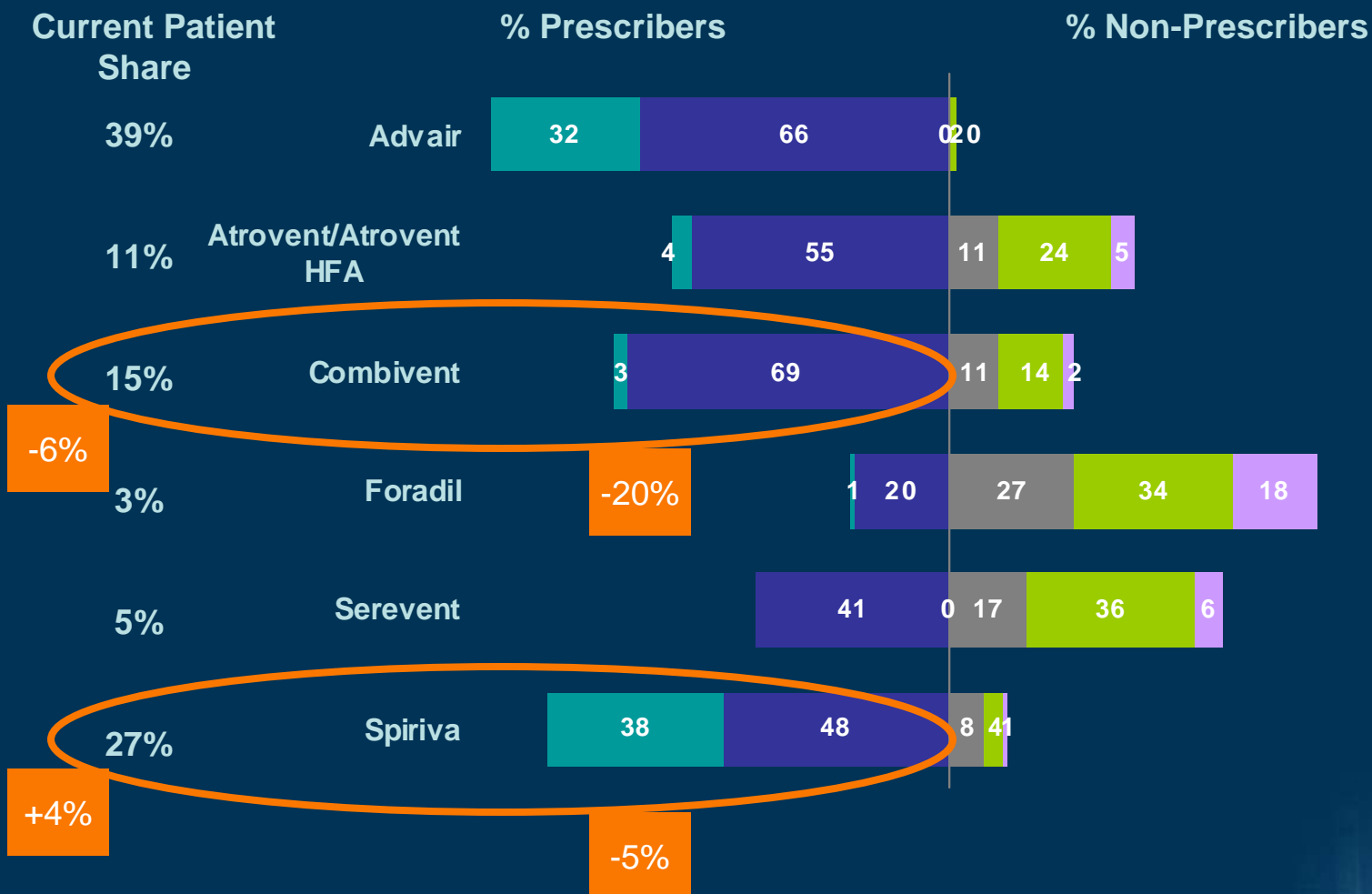
- Patient share stability and security increases by level of commitment.
- Committed physicians give 20-50% of scripts to their preferred brand.

The COPD Case 2005: Qualitative Difference Between Spiriva and Combivent.



Base: 200 PCP, US, Source: Conversion Model™ Study 2005 (TNS Healthcare)

The picture in 2007

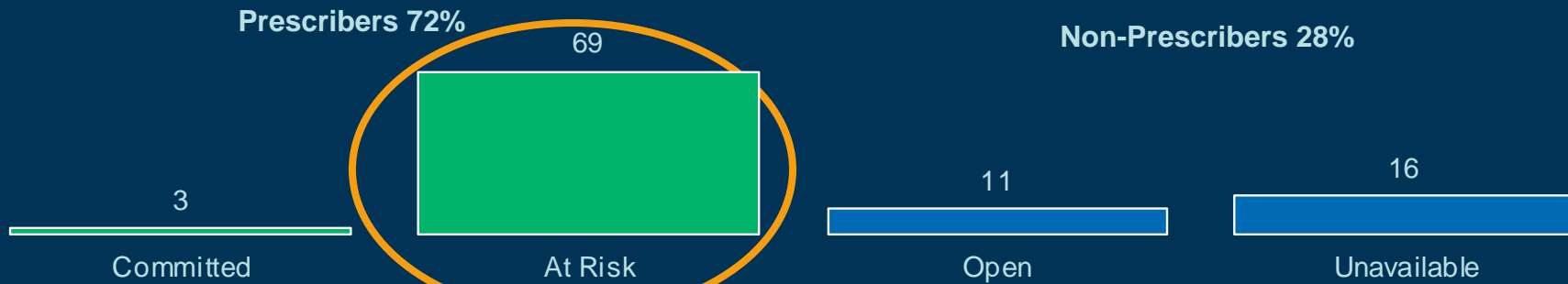


Base: 101 PCP, US, Source: Conversion Model™ Study 2007 (TNS Healthcare)

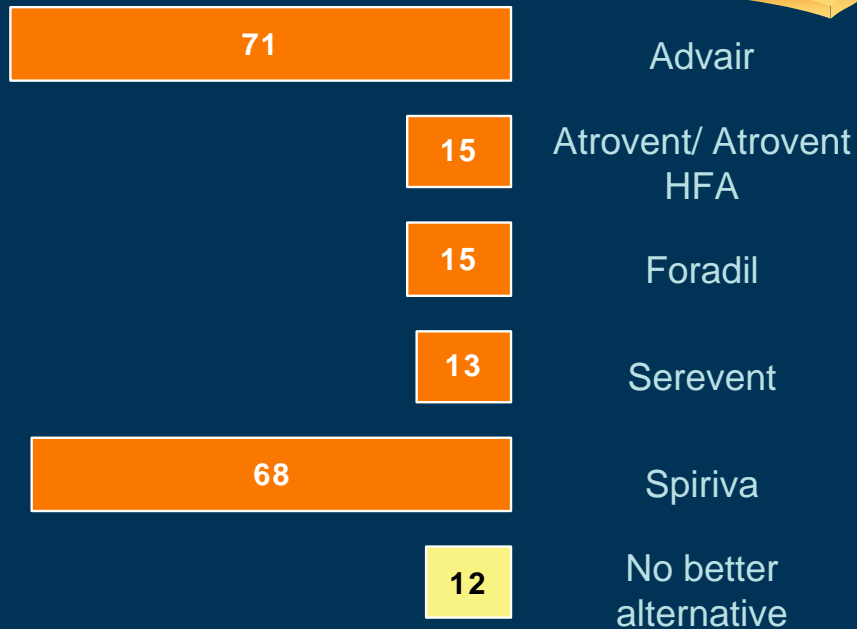


To which competitors are my users thinking of going?

Example: Combivent (COPD)



Where could prescribers at risk go?



Summary and Conclusions

- The value proposition is in the eye of the beholder: Is an ATU...
 1. simply a tracking tool of brand and market indicators...
 2. or a source of strategic guidance
- To make the most of an ATUs potential:
 1. Redefine the agency-client relationship from “order taker” to partner (iterative)
 2. Seek input from internal constituents (e.g., marketing and sales) to ensure relevance, value and credibility
 3. Consider a holistic view of the market
 4. Mitigate risk with strategies to build brand commitment



For more information, please contact . . .



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