

As a natural extension of our 45+ years of experience and the 7,500+ primary market research projects we've conducted, Bruno and Ridgway has developed a keen understanding of and **360° view into product launches**. Accordingly, we have advised, designed and conducted essential primary market research studies spanning the launch continuum that have served to distinctly inform and substantiate vital decision-making. Our *know-how and mastery of the types of research projects necessary* to assure a successful product launch reflect our commitment to and firm belief in substance over sizzle. Classic (vs. trendy), well-made, clever research will provide proven, sustainable insights with long-term benefit and application. The following slides contain excerpts from industry articles and reflect our perspective into what we believe provides the most wholesome and comprehensive guide to the type, timing and level of market research to be considered for any product launch.

Many of our repeat customers have relied on Bruno and Ridgway as a trusted advisor in support of their launch and lifecycle management strategic decision making.

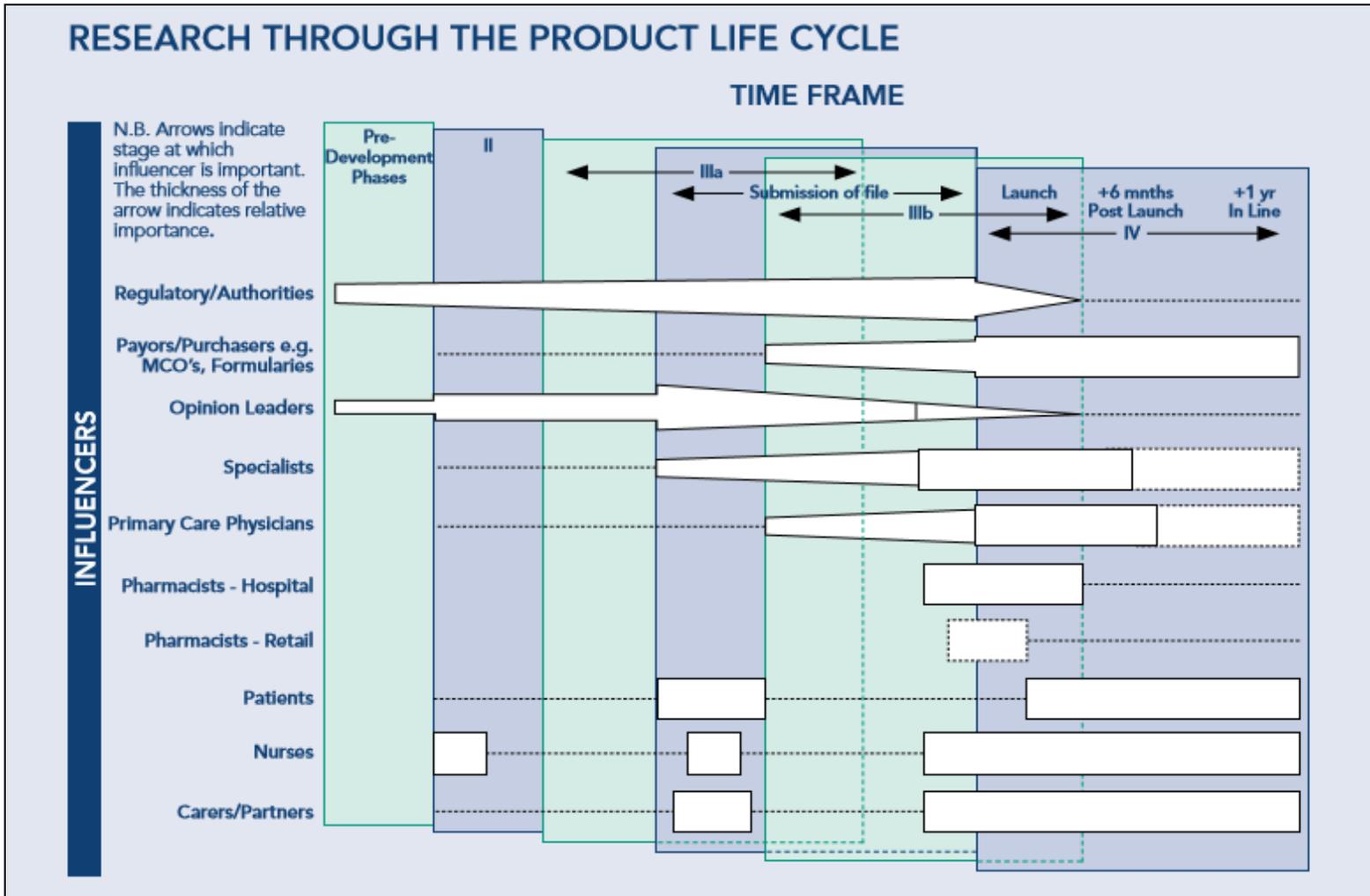
**Go for gold.** Roughly one in four launches involves drugs that are strongly differentiated from competing products and treat diseases with a high perceived burden. Examples include Zytiga, Johnson & Johnson’s prostate-cancer treatment, and Januvia, Merck’s drug to lower blood-sugar levels in people with type 2 diabetes. Such launches run a substantial risk of companies believing that the product’s high quality guarantees high sales volume. Capturing their full potential still requires shifting substantial resources from in-line brands to finance the launch. Companies must avoid the “good data trap” by seeking out possible barriers to prescription and focus on capturing the potential as quickly as possible by creating maximum early exposure to the product, closely monitoring launch uptake, and correcting course if necessary.

**Stand out from the crowd.** At the other extreme, more than half of upcoming launches are of moderately differentiated products in well-established disease areas, and the priority is to find a way to stand out from the crowd. These launches must find or create an edge that will allow the drug to be positioned effectively for particular patient segments and create clear differentiation from existing competitors. This requires innovative approaches to unveil insights into stakeholder needs and behaviors that competitors do not have. Finally, product pricing is another means for creating differentiation.

**Category creator.** For roughly 15 percent of launches, the priority will be to establish unmet needs effectively to ensure access to a well-differentiated treatment for a targeted population. We call these launches “category creators.” Gardasil, launched in the un-established human papillomavirus market, is an example. Companies must ensure they quickly understand the market’s unmet needs, make sure they don’t underinvest, and be prepared to react and course correct.

**Market shaper.** The remaining 8 percent of launches will face the substantial challenge of launching an undifferentiated product in an unestablished disease area. Once the decision to market such a product has been made, the priority for these market-shaping launches will lie in securing access for the product and effectively establishing unmet needs.

Identifying the Influencers on Prescribing a Pharmaceutical Product



## Summary of Sample Groups Used in a Pharmaceutical Market Research Program

	Market Understanding (Market size and potential/ segmentation)	Customer Needs/ Attitudes/ Behaviour	Product Profile/ Concept Testing	Trademark	Packaging Primary Secondary	Product Positioning
Payers/Purchasers			✓			✓
Opinion Leaders	✓	✓	✓✓			✓
Main volume prescribers, Hospital specialists, Office specialists (primary care)	✓✓	✓✓✓	✓✓✓	✓✓	✓✓	✓✓✓
Pharmacists - Hospital/Retail	✓✓	✓	✓		✓✓✓	✓
Patients		✓✓	✓✓	✓	✓✓	✓✓
Nurses		✓	✓		✓✓	
Carers/Partners		✓	✓		✓	✓
<b>STRATEGIC</b>						

Branding	Market Access	Pricing Research	Communication Messages /Brand Story Flow	Detail Aid/ Ad Testing	Sales Force Objectives	Brand Performance Tracking Research	Life Cycle Management
	✓✓✓	✓✓✓	✓				✓
	✓						✓✓
✓✓✓		✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓✓✓
	✓	✓✓			✓	✓	✓✓
✓✓✓		✓✓	✓✓	✓✓		✓✓	✓✓
✓			✓		✓		✓✓
			✓	✓			✓✓
<b>STRATEGIC</b>				<b>TACTICAL</b>			

- ✓✓✓ Important to conduct
- ✓✓ Important to conduct depending on therapy area
- ✓ May be required

## Market Research Methodologies – Market Understanding

### Questions/Issues

The business questions/issues that are typically addressed are:

- **Disease area**
  - How is the disease defined, classified and diagnosed?
  - What are the main symptoms?
- **Market size, structure and dynamics:**
  - What is the incidence/prevalence and morbidity/mortality of the area, diagnoses, and treatment rates?
  - What is the size of the market in terms of patient volume, monetary value?
  - What are the dynamics of the market?
  - What is the treatment profile (drug/non drugs and mono/multiple therapies)?
  - Are there any market trends?
  - Are there any barriers to entry?
- **Market needs**
  - What are the met/unmet medical needs?
  - What is the level of satisfaction/dissatisfaction with current treatments?
- **Market segmentation**
  - What are the disease and patient segments and how will they be identified in clinical practice?
  - What are the patient types and characteristics?
  - What is the size of the segments?
- **Competitors in development**
  - How similar are the competing drug profiles?
  - Who is the current and future competition?
  - How does a new compound fit in the marketplace?
  - Who are the leading companies in this area?

## Market Research Methodologies – Harmonizing the Results

Taking into account the market environment, the product, customer needs and clinical/competitive data, all the information is continuously collected, integrated and analysed to form a body of information and insights from which the product strategy and plan of action can be developed. Continuous monitoring during the life cycle allows the company to maximise the product potential and consider new/additional indications.

HOW CAN RESULTS BE PULLED TOGETHER INTO A COHERENT MESSAGE?

