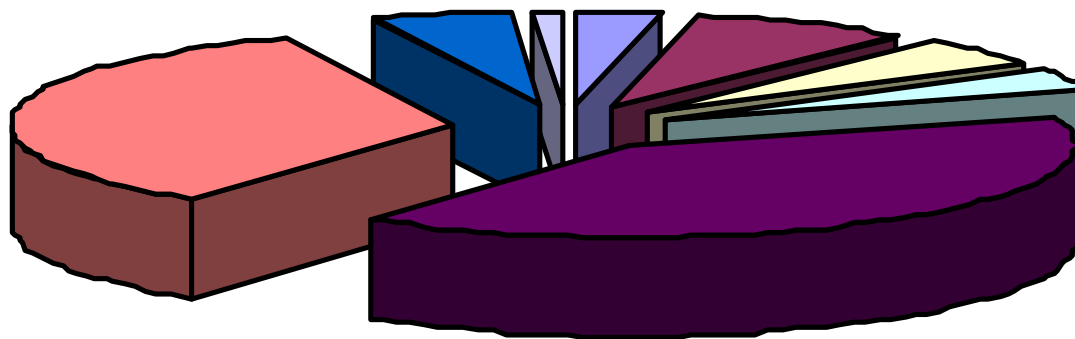


Market Intelligence- what is driving changes of relative shares in your market?

Statins Usage MAT March 03

Source: ISIS Research



- No Statin
- Lipitor Only
- Lipitor/Lipostat
- Zocor Only
- Zocor/Lstat/Ltor
- Lipitor/Zocor
- Zocor/Lipostat
- Lipostat





Market Intelligence Systems- Business Process

- ∅ Gaining Customer Insight
- ∅ This is how the customer thinks about the therapeutic area
- ∅ We should find this out from market research / knowledge





Market Intelligence Systems Business Process

- ∅ In the case of HRT, treatment length tends to be shorter than appropriate because of side effects
- ∅ “Really its not that the treatments don’t work, its because they cause side effects”





Market Intelligence Systems Business Process

- ∅ External
- ∅ KOLs,
- ∅ Marketing Consultants
- ∅ PR /Advertising Agencies, Wholesalers,
- ∅ Prescribing Advisors,
- ∅ PCT managers





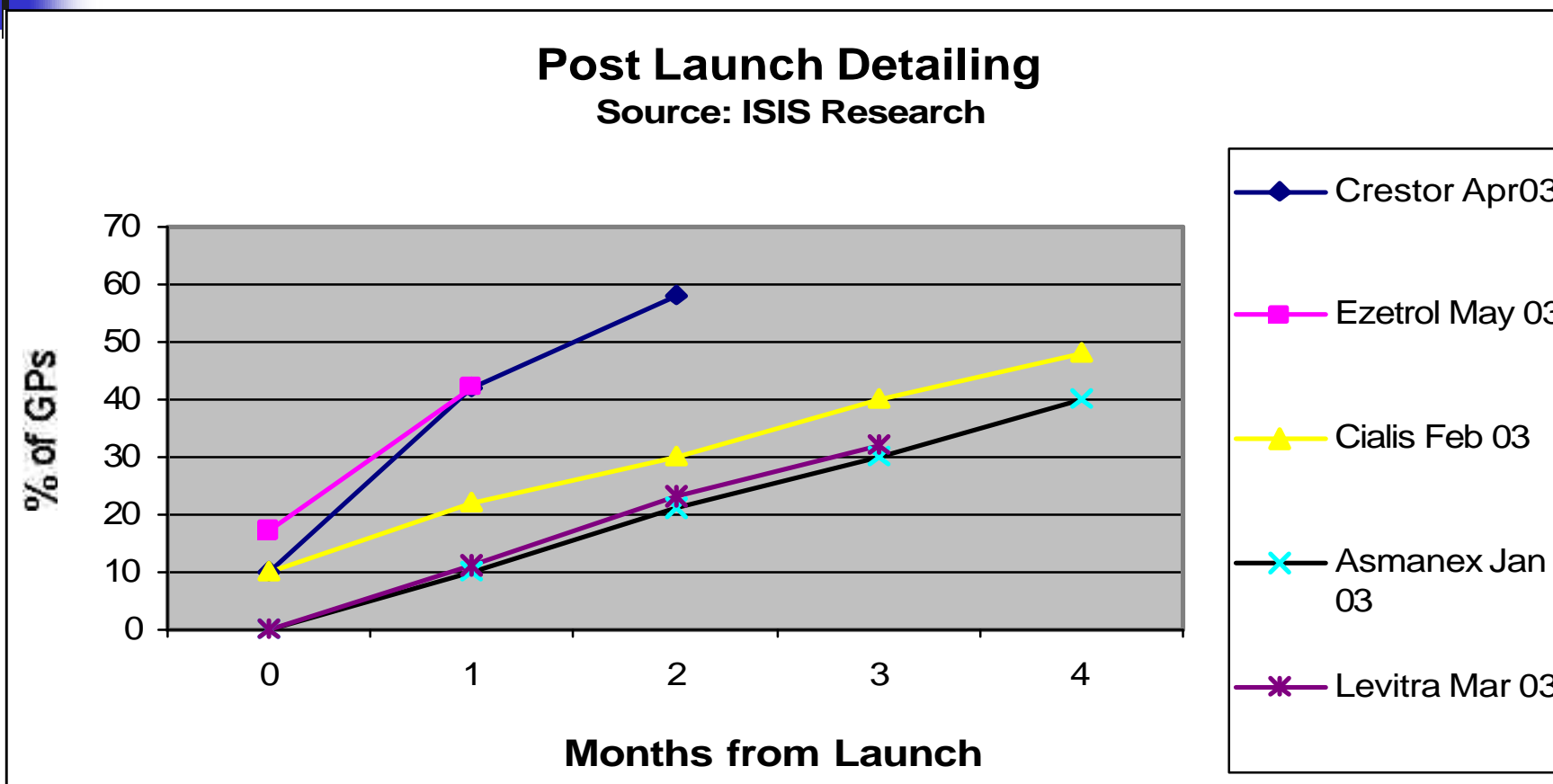
Market Intelligence Systems Business Process

- ∅ Talk to the internal / external experts for views on the market place
- ∅ Internal-Sales force, medical, Reg affairs, business research, finance, commercial teams, training



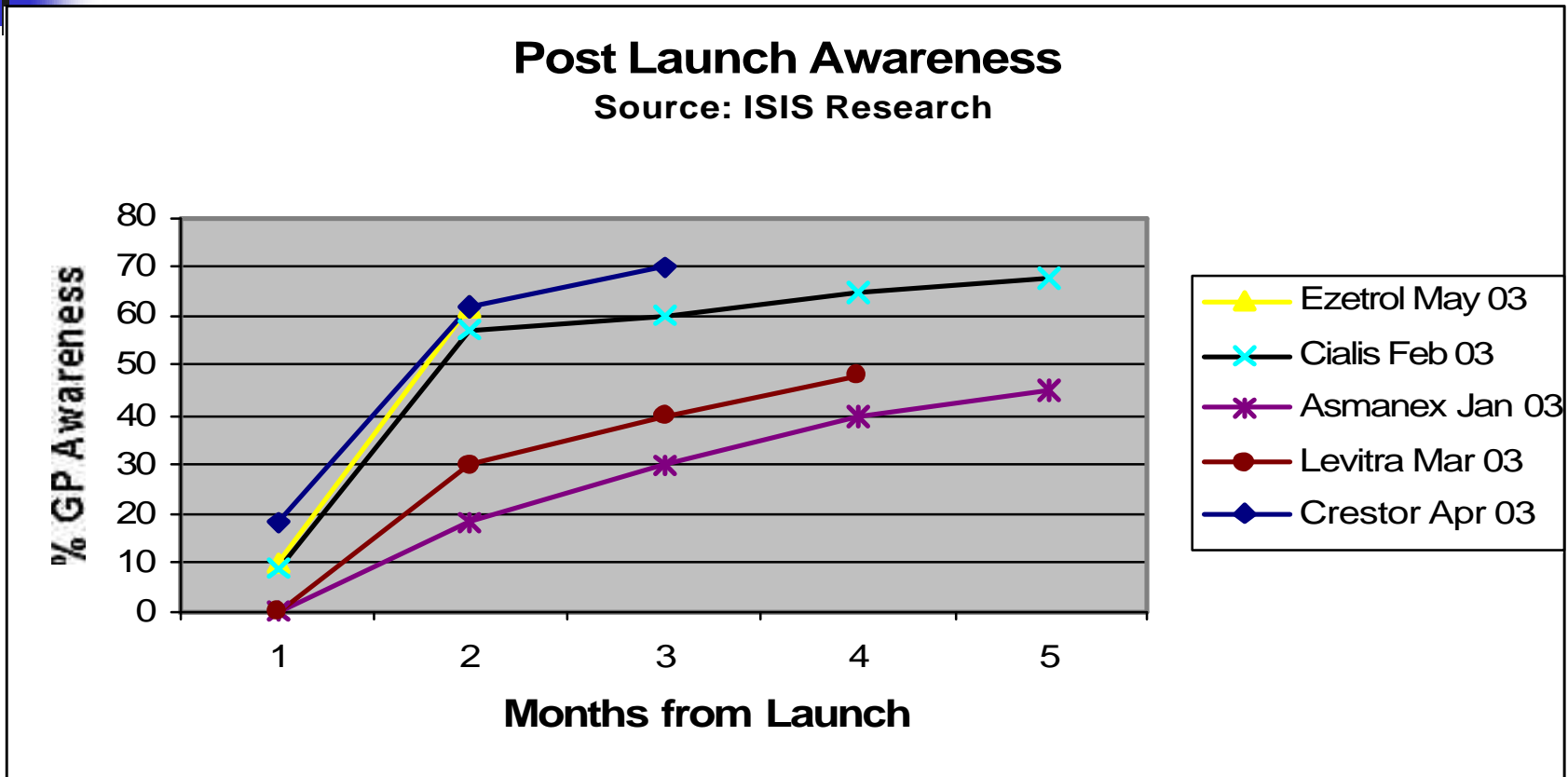
Market Intelligence-Who's detailing what?

Business Process




Market Intelligence-Brand awareness

Business Process

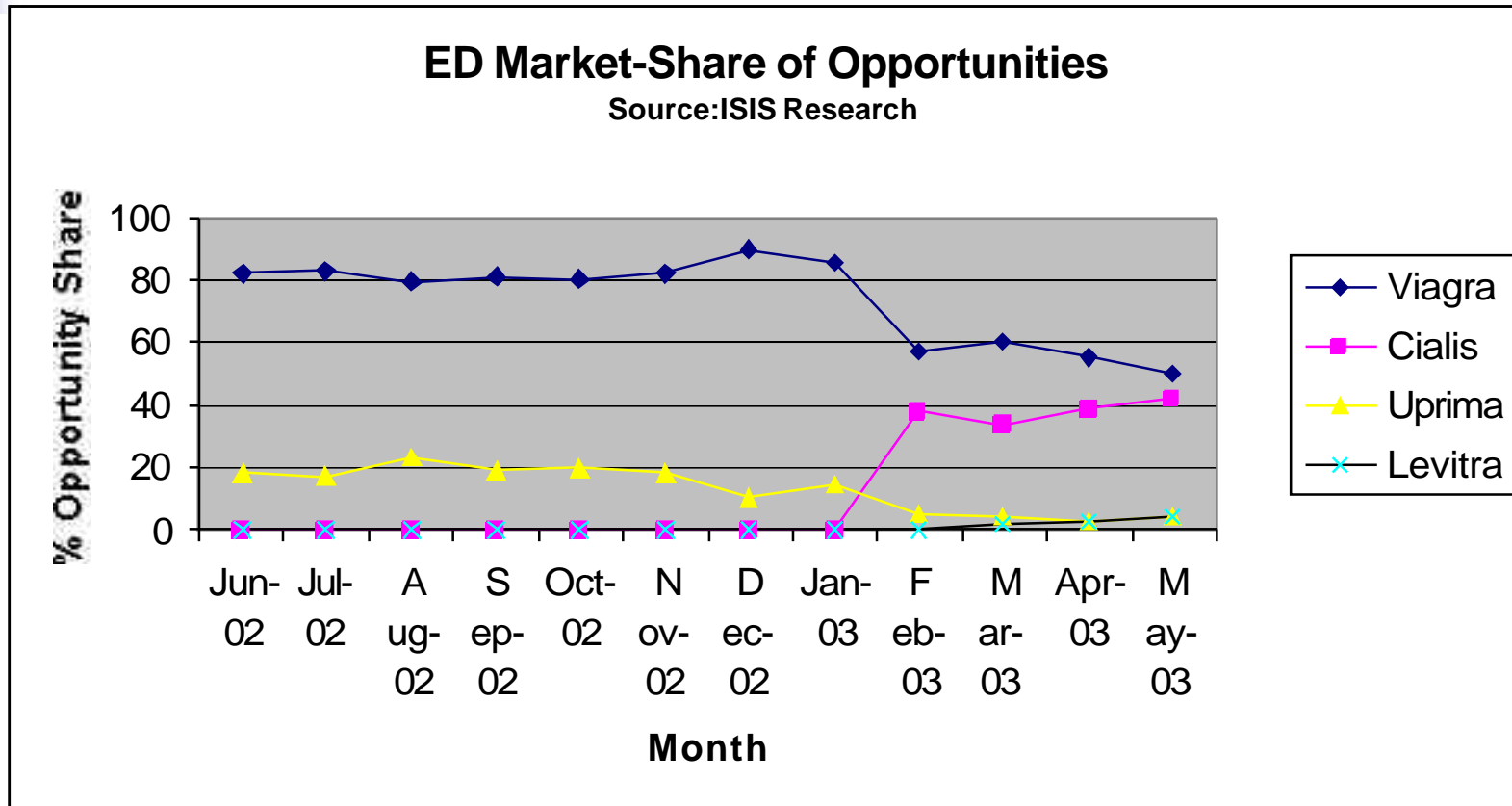


Market Intelligence-who is spending what on promotion e.g. advertising-business process

Top 20 Gp Advertised Brands		Indicative of promotional spend	
Rank	Brand	Ad Spend(£)	NHS Costs 2002 £m
1	Seretide	1016674	88.6
2	Arcoxia	915166	NA
3	Spiriva	852722	NA
4	Celebrex	822996	29.2
5	Cipralex	821569	NA
6	Lipitor	692037	201.9
7	Vioxx	691423	47.2
8	Nexium	666552	18.7
9	Symbicort	547772	12.2
10	Avandia	540814	17.4
11	Dovobet	528552	19.5
12	Detrusitol XL	491852	27.3
13	Viagra	479939	27.7
14	Plavix	467824	52.3
15	Istin	399140	140
16	Diovan 80	369994	22.5
17	Xyzal	368121	1.5
18	Cozaar	295667	56
19	Neoclarityn	280859	14.4
20	Flomax MR	267234	29.8
Source:		 © 2004 PHARMAFOCUS SOLUTIONS LTD	
Nielsen			
NHS Prescription Statistics			
Pharmafocus			

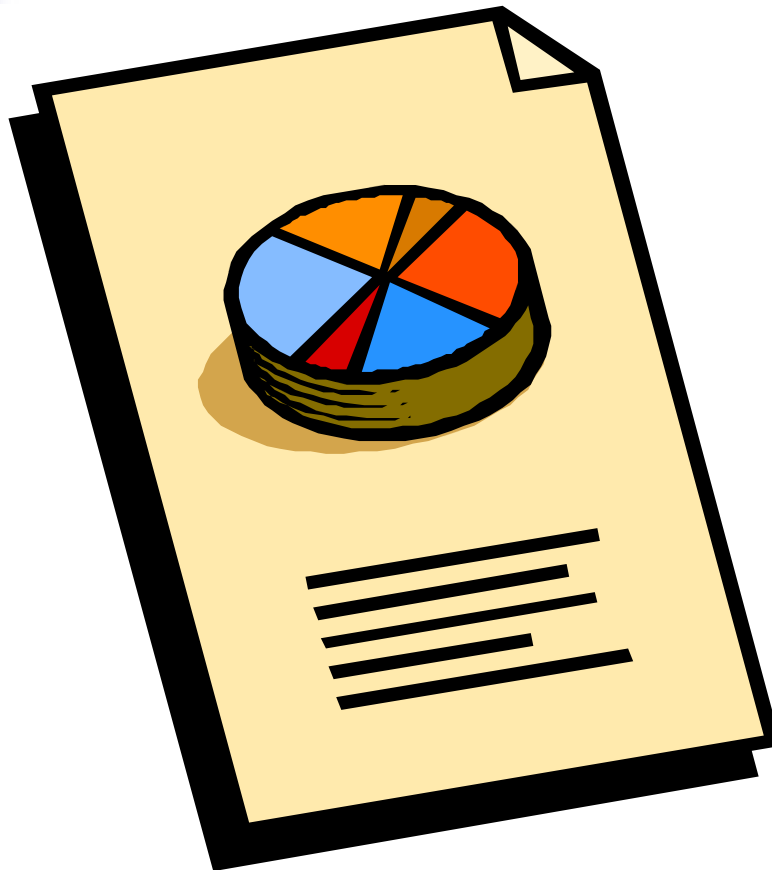
Market Intelligence-Opportunities

Business Process





Market Intelligence-Desk research



- ∅ IMS audits
- ∅ Ex factory sales
- ∅ Company financial statements
- ∅ Investment bank / industry reports