



GfK HealthCare

GfK HealthCare

Excellence in Custom and Syndicated
Healthcare Market Research and Counsel



GfK. Growth from Knowledge

Corporate Mission Statement

→ Companies need to make decisions.

Knowledge is the basis for decision-making.

Our business information services provide the essential knowledge that industry, retail, the healthcare and service sectors and the media need in order to make their decisions.

As a knowledge provider, we aim to be at the top in all the global markets in which we operate – in the interests of our clients, our employees, our company, our shareholders and the general public.

Corporate Values

→ Client-driven

Our clients' needs drive our business. We continuously seek to better understand our clients' needs, improve all aspects of existing research products, offer innovative products and to be an integral part of our clients' information systems. Accuracy, sound methodology, excellent client service, flexibility, timely delivery and cost effectiveness all ensure that we meet and even exceed our clients' expectations. We build long-term partnerships with our clients, contributing to their success.

→ Our people

People are our main asset. Development through training, sharing ideas and sound experience is essential to our business. Our people have the freedom to explore and develop their talents and are empowered to achieve our common goals. We encourage and reward initiative, dedication and hard work. Fairness, good communication and working relationships at all levels and locations are key to our success.

→ Innovation

We recognize that investing in continuous innovation in both the process and the end product is a prerequisite to meeting clients' requirements. Our aim is to be at the cutting edge with our key business activities. Clients' needs, evolving markets, new technology and the expertise and ideas of our people throughout the world are what drive innovation.

→ Global expertise – local knowledge

We respect and learn from local business practices and cultures and provide knowledge tailored to local needs. Our global network comprises international teams, tools and products to provide multinational clients with consistent services. As proud members of the GfK Group, we share local and international expertise to continually improve all aspects of our business.

→ Growth

Profitable growth results in greater opportunities. As individuals, teams and business units, we are aware of the impact of our decisions and actions at all levels. We use financial and non-financial measurements to review and improve performance on an ongoing basis. Our growth provides investors with a fair return on the financial resources they have entrusted to us.

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[Growth]



Established in 1934, GfK is a company with a long tradition of more than seven decades of innovation, vision and growth, and consequently, we are recognized as one of the world's foremost global market research organizations.

GfK. Growth from Knowledge

This substantial achievement is credited to the contributions of GfK's 7,500-plus employees, who are united across the world as one corporate family through the GfK Group integrated network of more than 130 market research companies in all major regions around the world. Within this global network is some of the best and brightest talent in the market research industry. Our highly experienced, motivated professionals not only have extensive knowledge of every facet of market research, but as GfK is organized into five business divisions – Custom Research, Retail & Technology, Consumer Tracking, Media and HealthCare – our employees also bring the industry-specific knowledge and hands-on experience required to best meet the client's individual needs.

Beyond GfK's chief strategic assets of intellect, experience and insight, another central factor in GfK's sustained success over the past 70-plus years has been its steadfast commitment to maintaining a strict focus on the business of market research. In this regard, GfK has not only leveraged this dedication to build one of the strongest brands in global market research, but the company also founded in 1934 a non-profit organization, GfK-Nürnberg e.V., to educate and promote awareness within the general business community of the critical role that market research plays in ensuring successful business decisions.

In brief, GfK is a strong market research organization, operating worldwide, with a long history of excellence and innovation. Our devotion to the profession of market research is evidenced by both the steady growth of our operations to become one of the industry leaders, as well as by our support of an expanded understanding and appreciation of the profession itself, within the international business community.

Healthcare

[Healthcare]





Healthcare is an industry where the need for accurate, timely and reliable information to support successful decision-making is absolutely imperative. Unlike the development and marketing of products in the consumer goods, retail and media industries, the products that are developed in healthcare are directly tied to one's health and well-being. Drugs and medical devices are being developed that can significantly improve people's lives – and in many cases even save them. As such, in the creation of these substances and devices, it is the responsibility of healthcare manufacturers to seek out and listen to the opinions, concerns and feedback of physicians and patients to make sure they address these critical needs. Here, GfK HealthCare market research contributes as a vital function in healthcare companies meeting their responsibilities in this regard.

Healthcare: an industry with an imperative need for market research

While there are significant humanitarian gains to be met by identifying new healthcare substances, there are also significant financial rewards – as well as risks – at stake for healthcare manufacturers. Facing enormous economic and competitive pressures, healthcare companies are investing heavily in the development and launch of new brands, the defense of successful brands and the expansion of their leadership position. The best possible marketing and sales efficacy is unquestionably more important than ever before and is the subject of intensive deliberations concerning strategy and tactics, and their implementation. As such, the need for dependable information and knowledge to reduce risk in decision-making is once again fulfilled through the activities of GfK HealthCare market research.

Up against this competitive backdrop, there is also the increasing globalization of the healthcare industry. In their marketing efforts, healthcare manufacturers must now navigate a large and complex global medical marketplace, where there are important differences to consider related to each individual country's economic, social and political environments. In this regard, GfK HealthCare market research plays a critical role in helping healthcare companies understand the distinctions among the countries and their cultures, for example by helping them understand how medicine is practiced and drugs are perceived in foreign nations.

With such a complex maze of dynamics to navigate in today's medical marketing environment, GfK HealthCare stands ready to help guide our clients to successful decision-making by arming them with a foundation of accurate, reliable information as well as sound and competent counsel.



Global

[Global]



Who is GfK HealthCare?

GfK HealthCare:

■ Excellence in Custom and Syndicated Healthcare Market Research and Counsel

The world's top global players in the pharmaceutical industry, medical device and diagnostics, dental and veterinarian medicine entrust GfK HealthCare as their market research partner, as we have extensive experience within practically every therapeutic area and at every stage of the product lifecycle. Accordingly, this depth of knowledge and experience, together with a growing roster of blue-chip clients, has helped to make GfK HealthCare the largest provider of custom market research to the healthcare industry worldwide.

In addition to a full range of custom qualitative and quantitative competencies, GfK HealthCare is also an industry leader in syndicated research solutions, offering multi-stakeholder therapeutic class analyses, issue-based studies and promotional/sales force effectiveness tools. With robust insight into physicians, patients and managed care leaders, GfK HealthCare draws detailed portraits of all your customer groups – and the interactions between them that drive prescribing.

GfK HealthCare is represented across the globe by several strong brands, which are united through the supportive and closely integrated GfK HealthCare international network:

- GfK U.S. Healthcare Companies: comprised of three premium brands in custom and syndicated healthcare market research
 - GfK Market Measures (East Hanover and Princeton, NJ, USA)
 - GfK Strategic Marketing (Bala Cynwyd, PA, USA)
 - GfK V2 (Blue Bell, PA, USA)
- GfK HealthCare (London, England)
- GfK HealthCare (Nuremberg, Germany)
- GfK HealthCare Asia (China, Hong Kong, Singapore, Taiwan, Thailand)
- GfK Research Matters (Basel, Switzerland)
- Additional GfK operating companies throughout the world with dedicated healthcare teams in Scandinavia, Eastern Europe (including Russia and Poland), Austria, Italy, Spain, Portugal, Turkey, Switzerland, Benelux

As the largest global provider of custom healthcare market research, GfK HealthCare has conducted research in every major healthcare market in the world (as well as many secondary markets), and is well-positioned to support our clients' international project needs with responsiveness, quality and control. By utilizing the international network of the GfK HealthCare Group, clients benefit from the continuity of a single market research resource to create programs that are integrated at a global level, while also leveraging the flexibility that comes from our comprehensive knowledge of various national healthcare markets, to help tailor programs at the local level.

Expertise

Expertise





As a full-service global agency, GfK HealthCare works with clients to develop and implement proprietary healthcare market research approaches, as well as a complete range of qualitative and quantitative methodologies, syndicated research solutions and strategic marketing counsel to support:

Our Areas of Expertise

- Successful new product development
- Market launch of new products and support of established brands
- Improvement of customer loyalty
- Analyses of brand value, brand equity, pricing and positioning
- Development of product positioning and messaging
- Assessment of key markets and issues
- Comprehensive insights into therapeutic categories
- Optimization of promotional/sales force effectiveness

In addition to our expertise in custom qualitative and quantitative research and syndicated research solutions, GfK HealthCare also has significant experience in ad hoc and multi-client panel research as well as in conducting physician, pharmacist and patient panels.

We have conducted market research with nearly every key stakeholder group in the healthcare industry, from physicians, patients and consumers to managed care decision-makers (payers), key opinion leaders, allied health professionals and sales representatives.

Knowledge gives clients the lead, and GfK HealthCare is focused on providing our clients with the specific knowledge and counsel needed to make marketing decisions with confidence, in order to get that important competitive advantage. We strive to provide clients with comprehensive, sound and reliable information, as well as insights and action-oriented solutions to important business questions such as:

- Where are the future market potentials?
- What is the optimum product/brand profile?
- What is the right pricing strategy?
- In which indications and for which patient segments are my products and drugs preferentially prescribed?
- What motivates physicians in their choice of therapies and drugs?
- What is my position in relation to the competition?
- Does my brand strategy work?
- Is my brand image sufficient to survive successfully in the long-term against the price-intensive competition?
- Do the basic contents of my sales communications convey the brand features important for prescription?
- How can those product concepts that will become the mainstay of my business development be recognized early enough?

Excellence

[Excellence]





GfK HealthCare has worked diligently to build a reputation for market research excellence within the healthcare industry. And, we make sure that in our day-to-day collaborations with clients, we hold ourselves to the highest standards of quality in order to maintain our highly regarded reputation.

Our Commitment to Excellence

Our significant healthcare-focused market research experience and tailored approach to serving the specific needs of each client (rather than implementing “one size fits all” research), together with our emphasis on responsive client relations ensures that our clients receive not only a superior research product, but a superior level of service as well.

The GfK HealthCare team strives to form true partnerships with our clients rather than just client-vendor “transaction-based” relationships. For GfK, partnership means that we work jointly with our clients at every phase of the project. Our approach to partnerships entails:

- Mutual development of and agreement on study designs
- Flexibility
- Regular monitoring and open communication regarding the progress of the study

At GfK HealthCare, we understand and appreciate that in today’s fast-paced, competitive medical marketplace, clients not only need a market research partner who delivers a premium research product, but one that is responsive and attentive to the established project timelines. As part of our commitment to complete customer satisfaction, we ensure the punctual delivery of information at each phase of the project. Furthermore, to facilitate our clients’ review of the results, we prepare and present our reports in a clear and concise, customer-oriented manner. From start to finish, GfK HealthCare seeks to provide consistent quality and seamless service to our clients. And at every step, we are focused on one goal: providing successful and actionable solutions to our clients’ critical business questions.

Partnership

[Partnership]



GfK = Growth from Knowledge

We believe that through our research, we provide the knowledge and counsel to help our clients make sound business decisions, which ultimately stimulate their companies' strategic and financial growth. In the same vein, our corporate maxim of "Growth from Knowledge" also means that knowledge helps drive professional and intellectual growth. As such, GfK HealthCare firmly believes in keeping our employees current on the latest market research and healthcare developments, and – in step with our commitment to creating "partnerships" with our clients – we have established a formal program for the ongoing education of their market research employees, as well.

Furthering Knowledge: within GfK and the industry

GfK HealthCare Academy

This series of seminars provides a channel for GfK HealthCare to educate both its employees, as well as its clients' market research employees, on topics ranging from the latest advancements in market research methods and instruments, to trends and developments in the healthcare and market research sectors.

In addition to establishing a training program for the benefit of our employees and clients, GfK HealthCare is proud of the leadership position we have taken to help educate others (even our own competitors!) in the healthcare and general market research industries. The senior management of the companies within GfK HealthCare are each intensely involved as "thought leaders" in a variety of key industry groups, serving as instructors for educational workshops, speaking at annual general meetings and holding positions on committees and boards. These international professional societies include:

- **EphMRA** (The European Pharmaceutical Marketing Research Association)
- **PBIRG** (The Pharmaceutical Business Intelligence & Research Group/USA)
- **PMRG** (The Pharmaceutical Marketing Research Group/USA)
- **BHBIA** (British Healthcare Business Intelligence Association)
- **ESOMAR** (The World Association of Opinion & Marketing Research Professionals)
- **CASRO** (Council of American Survey Research Organizations)

Thank you for taking the time to read this brochure. Please do not hesitate to contact us directly if you require any more information.

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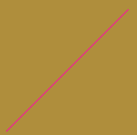
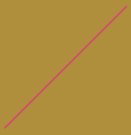
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