

Industry Forum

In Pharma We Track The Launch... In Consumer They Track The Brand

What are the business needs, insights and decisions that tracking the brand supports?

This article argues that in Pharma, the global value of tracking is often too limited: tracking is sometimes seen as purely tactical and local market driven, therefore usually gets insufficient global resources. We argue that it should be shaped and positioned as a research process to manage the lifecycle of key brands. As such it should be more strategic and be more at the heart of brand development—by doing this, more long-term brand equity is established. The 12 months post-launch period is a critical time in which tracking has a key role in monitoring and directing brand **performance** and **positioning**. In the Pharma industry, these functional aspects are key to product success and are prerequisites for launch. However, after the launch phase, **brand values and equity** should also be tracked to support long-term brand development.

The key strategic intelligence elements of lifecycle management which need to be measured to inform the 'corporate dashboard' include: level of brand awareness, communication of 'right' message (in a competitive environment), usage in correct 'target' patients, endorsement (confidence in brand and future belief). The consequences of not assessing these things optimally mean that investment cannot be maximized and potential success is not transferred from market to market. Problems include:

- Ineffective medium (mis-communication of message, failure to reach target, or lack of impact)
- Positioning not credible (bad experience, barriers to use)
- Early warnings and positioning not picked up and collated centrally
- Ineffective tracking of the brand equity (no or poor recall or misinterpretation).

How best to meet local and global needs

At the global/regional level, standard tracking initiatives are typically short lived, restricted by launch budgets, and subject to change in strategic focus and team composition (e.g. downsizing) and changes in ownership (e.g. switching to local markets). In an improved model, global/regional investment is bigger and earlier, and there is a focus on lifecycle management which involves getting new trials right and controlling proper roll-out of indications.

At the local level, tracking initiatives were historically better established and had more ownership (local sales targets), but (1) did not have the tools needed at global/regional level to guide strategic initiatives; and (2) communication to "learn" across markets wasn't critical. Today, any questions/concerns 'travel faster' (between patients as well as healthcare professionals) and we set benchmarks for common targets to monitor value.

Why the need for more critical global intelligence?

Today's increasing cost of market entry and increased competitive environment means there is more pressure on companies to optimize launch success of new brands and, increasingly, to invest in existing brands to maintain sales growth over time, driving market expansion with stronger brands, and to maximize value from existing brands.

The new model is bigger than tracking the launch

The new ideal is for companies to build a company-wide policy on monitoring through a wide range of tools. The past bespoke ad hoc tracking is now becoming integrated into the total 'corporate dashboard', to embrace both communication (and sales force) effectiveness, and brand image (health care professionals and patients) and prescribing.

For tracking to become a strategic tool to drive lifecycle management, we see five imperatives: studies must be designed to be more comparable/understandable, transferable, timely, consistent, and cost effective. All of these can be a challenge for large tracking projects.

1. **Be comparable/understandable**—It is important to track against pre-set objectives/targets (not only on awareness and usage, but also against communication objectives). Ideally the corporate dashboard needs to be agreed at branding/positioning sign-off. When this doesn't happen, it creates comparability challenges. There needs to be a balance between wide input/ownership, yet one strong point of contact (avoiding the problems of design by committee). It is critical to build in time for transition and ownership of key performance indicators within local companies.
2. **Be transferable**—There needs to be investment in dedicated country representatives within the agencies that can support directly, particularly in the US.
3. **Be timely**—Data must be provided within days of finishing fieldwork. This requires extended resourcing, investment in IT solutions, and critical human skills to meet quality and accuracy (so is more costly).
4. **Be consistent**—Core questions must not be designed in subsequent waves. One solution lies in modular design: this requires time commitment to design a tool that can be added to so additional market information needs can be accommodated.
5. **Be cost effective**—Efficiencies can be created over time as the process and integration of data into the organization becomes systematic. There should be transparency of costs, and fieldwork budgets needs to be agreed with purchasing and local operating companies.

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Primary Research

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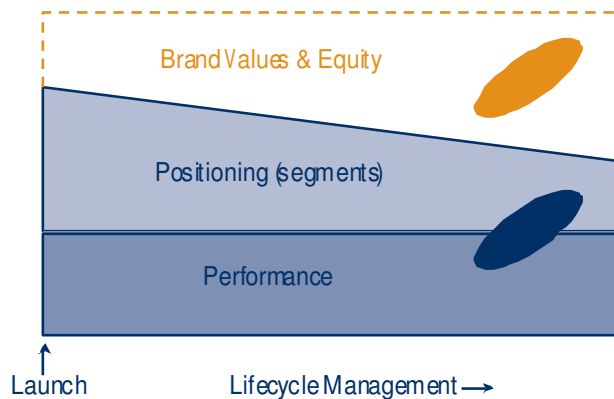
The hard part: how do we track brand equity?

Brand equity will be a function of practical and clinical performance, perceived value, and the feelings and confidence associated with the prescribing and taking the medicine. In what ways can brand equity be measured (tangibles vs. intangibles: the emotional vs. functional measures)? Key to this process is to build insight into levers for choice by capturing derived importance of intangible parameters, so that brand performance can be captured on each parameter. Intangibles include factors like perceived value, personality, reputation (of company generally or in a specific franchise area associated with the brand).

In summary, drug brands are built on a foundation of performance and positioning and we currently track these areas (see Figure). What is often missing is tracking brand equity, and we suggest that this will be an important addition to future tracking studies. Therefore, we need to develop a battery of techniques (emotional, visual, verbal) to build additional insight and understanding to better monitor stakeholder perception of brand values, and add this to quantitative measures used in tracking studies. This will allow us to fully understand brand values and equity and leverage its role in supporting key brand lifecycle management.



Figure: Components of tracking studies



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