

Il pianeta Farmacia

Dall'offerta di cura al marketing del benessere

ASSIRM

Marketing Research Forum 2015

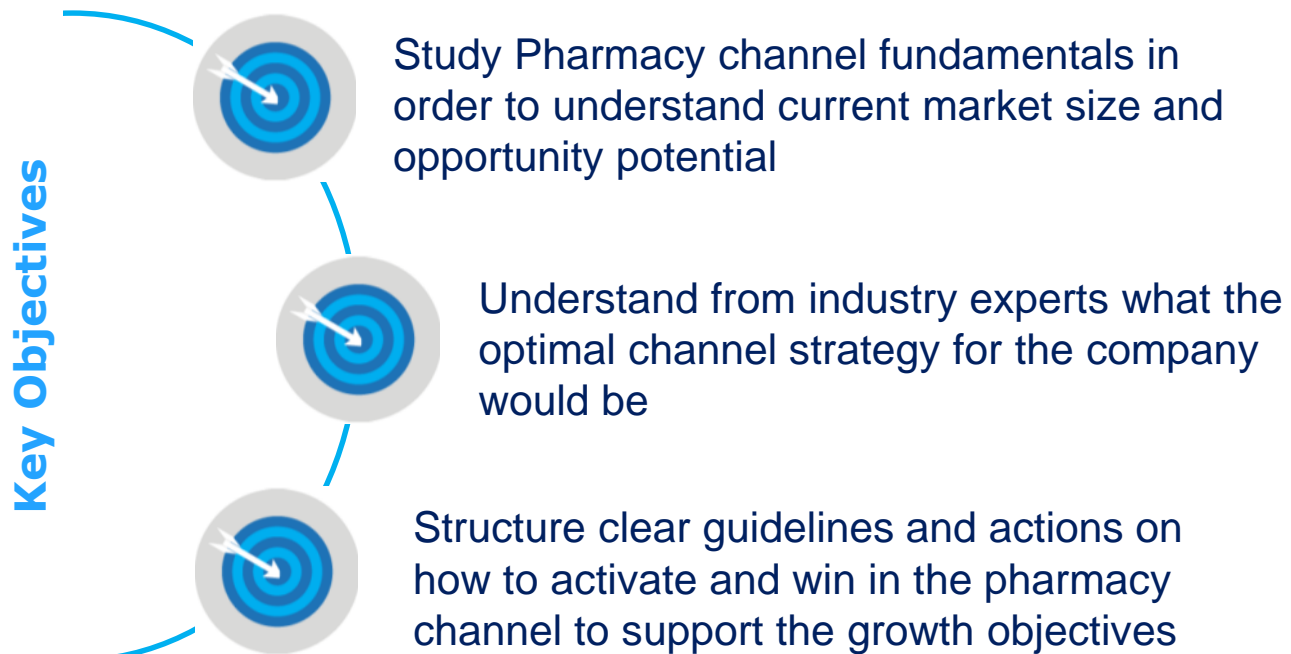
29 October 2015



Pharmacy is a major channel for the client business in global markets but in Italy this company was mainly playing in the Mass Market

Client's key objectives

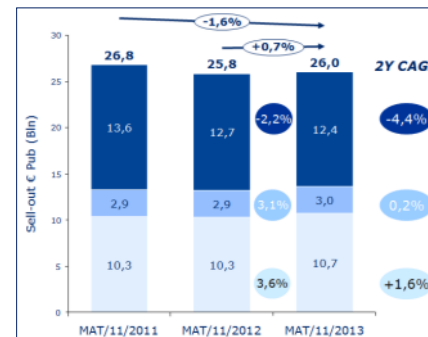
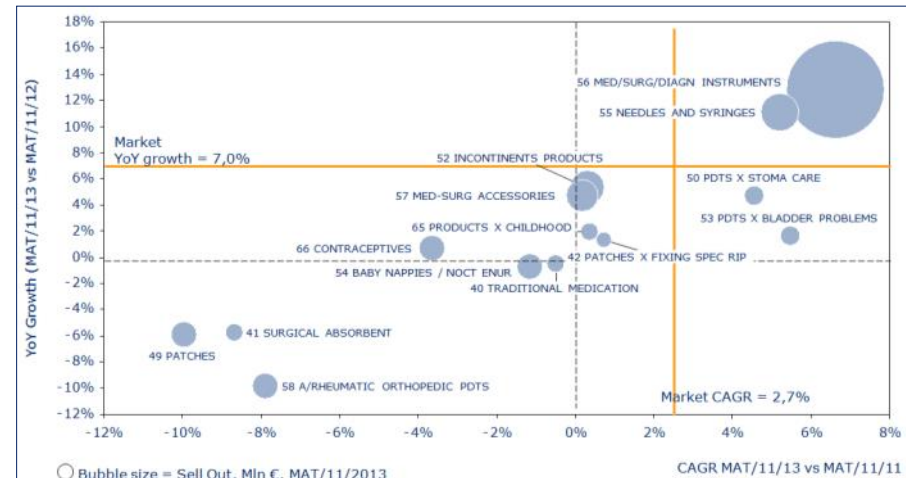
- By rolling out a multi-country engagement, the company was looking for opportunities in Pharmacy channel as part of its growth strategy
- In this context, we assisted the company in designing the optimal strategy to win in the Pharmacy channel



A comprehensive overview of the market has been developed relying on IMS Health datasets and consulting capabilities

Assessing the market helped the client understand key figures and dynamics

- By relying on our deep market knowledge and data assets, we developed a comprehensive assessment of the market and its key segments
- Key market figures and dynamics, main players, products and SKUs performances have been analysed offering a deep and wide understanding of the competitive landscape
- IMS Health proprietary and international market classification allowed the client to have the same market overview across the countries



By implementing a Pop Up solution within a sample of Pharmacies, we get a clear understanding of the relevance of existing source of business

Pop Up solution addressed Source of Business potential

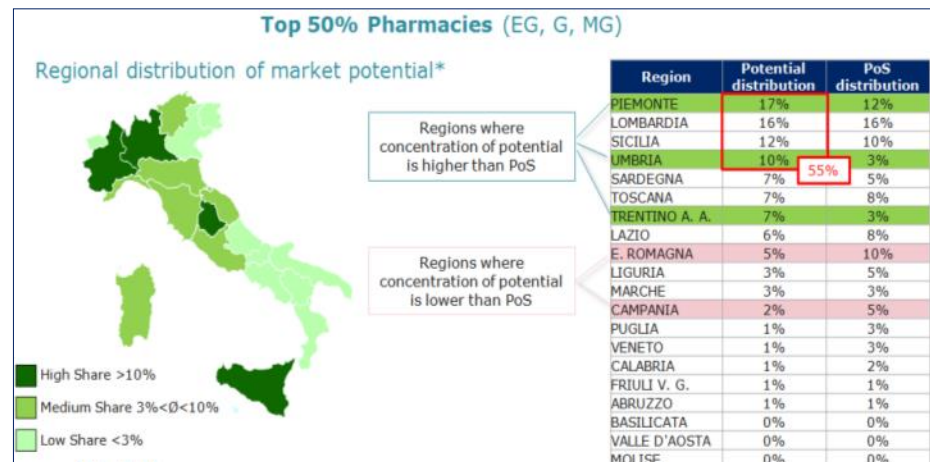
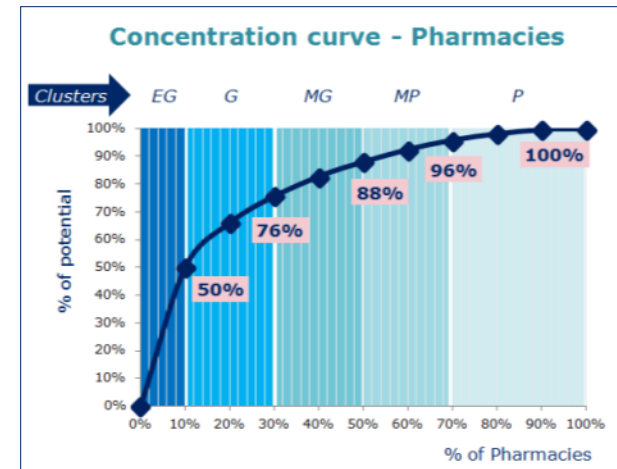
- This innovative IMS Health solution relies on a software capability that may run on each Pharmacy terminal
- It allows the chance to conduct quick surveys (closed questions) on an extensive set of Pharmacies, according to client needs
- Each time a product is sold, a Pop Up appears on the screen asking to provide info about the purchasing act
- With a few “clicks” Pharmacist and/or Consumer can quickly answer to the survey



Pharmacy Analytics gave to the client a clear assessment of each territorial estimated potential for in scope markets

Pharmacy Analytics helped understand potential at PoS level

- IMS Pharmatrend panel allowed the client understand the distribution and the potential of market categories
- Sales data have also been analysed to match Pharmacy assessment with territorial distribution of product sales
- This stream allowed the client to understand how many Pharmacies should be covered in order to maximize growth opportunities



With an in-store observation stream we get a deep comprehension of key opportunities and areas of development for our client

Pharmacist across Italy have been interviewed (face to face)

- This step allowed the client to know the key pharmacy dynamics related to in-scope market categories
- We surveyed 275 Pharmacies taking into consideration:
 - Structural variables of pharmacy (size, staff, location)
 - Available brands and shelf display
 - Information level received by pharmacist about brands and categories

AREA	UNIVERSE	PANEL
NORTH	45%	47%
CENTER	19%	17%
SOUTH	36%	36%



By relying on our strong and deep relations along the Pharmacy channels we engaged different key stakeholders to gather insights and recommendations

Face to face interviews with key roles along the channels

- We wanted to understand the role and market potential of in scope categories within the Pharmacy channel and provide insights on the approach and initiatives to use to develop these segments
- We run 26 in-depth individual interviews with:
 - 20 owners of retail Pharmacies
 - 2 Cooperatives managers
 - 1 private Wholesaler
 - 2 heads of Pharmacy Chains
 - 1 AM of a Consumer Health company



Final step of the project consisted in gathering key outcomes a deploy a structured set of recommendation according to a global framework

Putting all together and give actionable recommendations

