

Taking the Pulse[®] Europe

United Kingdom ■ France ■ Spain ■ Italy ■ Germany

PharmiWeb Solutions Sponsorship Package





Research Methodology

manhattanRESEARCH

Sample size of n=1000 practicing physicians in Europe

- Countries included: United Kingdom, France, Germany, Italy and Spain
- 150 Specialists and 50 Primary Care Physicians from each of five countries
- Honoraria offered for completion

Randomly generated (RDD) telephone interviewing

- Nationally representative sample of practicing physicians by individual country
- Survey offered in English and primary language of each country

Interview Screener:

- "Research about 'communication channels' utilized in the practice"

In-depth interviews (average 25 minutes)

Fielding September through November 2006

Data released mid-November 2006



Research Topics Covered

manhattanRESEARCH

Market Sizing & Forecasting

- Technology infrastructure in the practice (PC, EMR, eRx)
- Internet adoption & other information sources used
- Broadband/high speed communication
- Search engine utilization and search patterns
- Professional activities online (and frequency)
- Use of electronic mail and future interest by content provider

Pharmaceutical Company Interaction

- Corporate and product websites
- Customer service expectations
- Electronic detailing and e-promotion

Patient Interaction and e-Connectivity

Point of Care (POC) technologies

- Handheld usage and medical applications

Online Medical Education

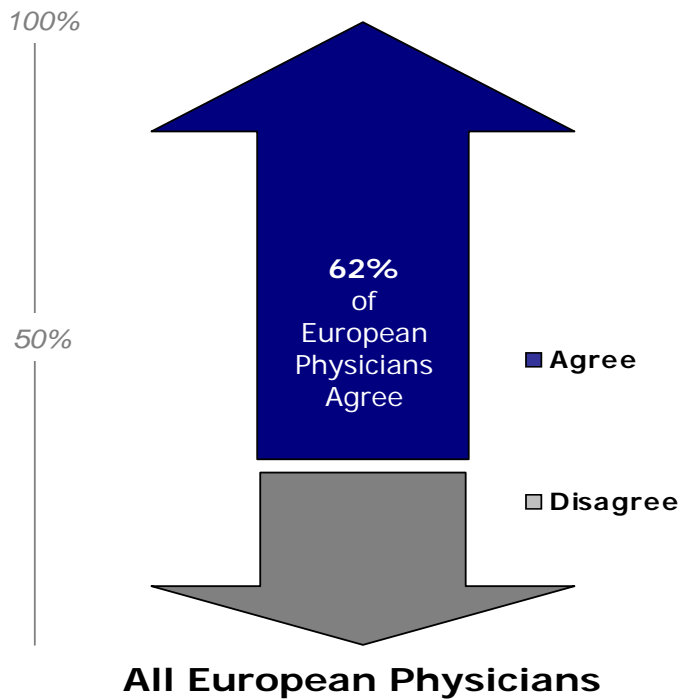
Clinical Trials Information and Resources

Overall Adoption Trends among European Physicians

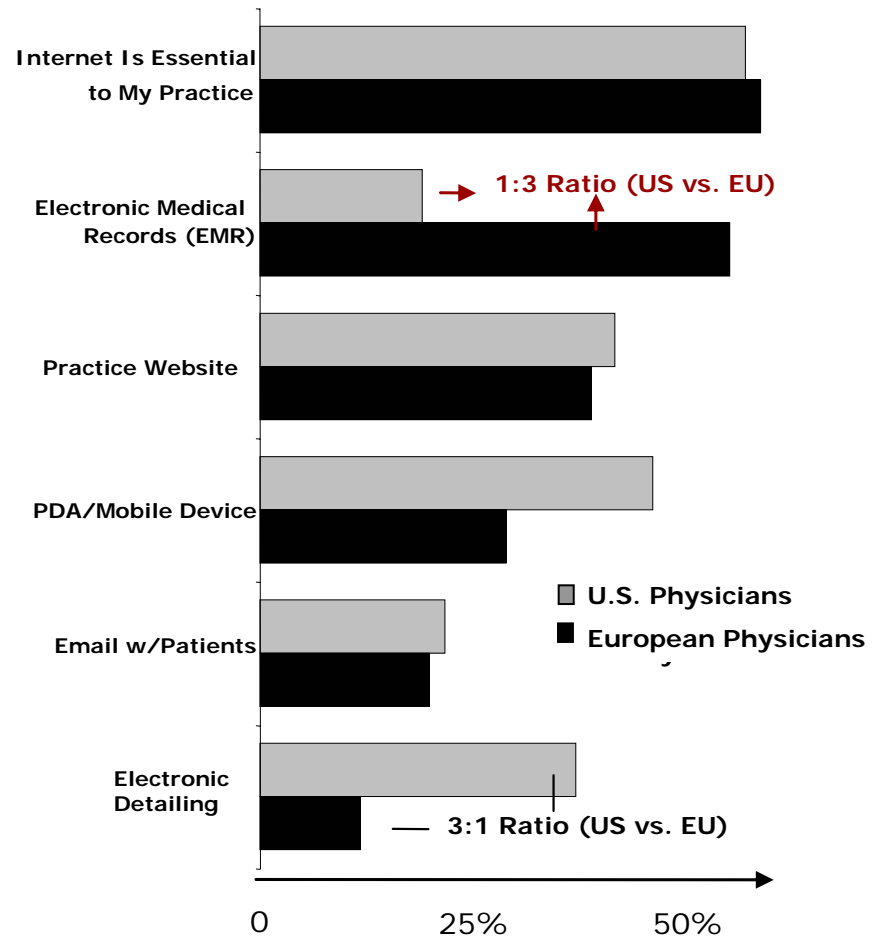


manhattanRESEARCH

“The Internet Is Essential to My Practice”



Technology Adoption ...
US Physicians vs. EU Physicians





Local Sites Are Favored by European Physicians

manhattanRESEARCH

The screenshot illustrates a user's experience navigating from a UK-based medical website to a more localized European platform. The top browser window displays **Doctors.net.uk**, a site for UK doctors, featuring login options and educational resources. The bottom browser window shows **univadis**, a platform offering medical information and services, with a prominent 'Country access' list.

Doctors.net.uk features:

- LOGIN JOIN forgotten password?
- The free network of 123,972 UK doctors
- E-MAIL – spam and virus protection
- Doctors.net.uk e-mail is accepted in all NHS Trusts
- EDUCATION – ideal for appraisal
- New: flu training All the facts you need to know with a flu pandemic

univadis features:

- Country access: Austria, Bahrain, Belgium, Denmark, Egypt, Estonia, Finland, France, Germany, Hungary, Iceland, India, Israel, Italy, Kuwait, Lebanon, Netherlands, Norway, Oman, Pakistan, Portugal, Qatar, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, United Arab Emirates, United Kingdom
- Medicina e oltre. Una miniera di informazioni e servizi utili da consultare quotidianamente per il tuo aggiornamento professionale e per i tuoi interessi personali.
- Services: La banca dati Landana farmaceutica, Spazio per il Medico di Famiglia, Servizi bibliografici, Tutte le immagini dell'Atlante Braunwald da scaricare, Manuali Merck in italiano, Notizie mediche quotidiane da Studere e ADQ, Kronos Salute.

Physician Research - Taking the Pulse® Europe



Segmentations Available

manhattanRESEARCH

These segments are available for analysis at the European level...

- General Practitioner (GP)
- Pediatrics
- Obstetrics and Gynecology
- Cardiology
- Dermatology
- Infectious Disease
- Oncology
- Nephrology
- Psychiatry
- Rheumatology
- Surgery

Country-specific segments of practicing physicians...

- United Kingdom
- France
- Italy
- Spain
- Germany

These segments are available for directional insight* ...

- Allergy and Immunology
- Endocrinology
- Gastroenterology
- Neurology
- Ophthalmology

** due to sample sizes of practicing physicians*

PharmiWeb Solutions Charter Subscriptions



manhattanRESEARCH

Primary Service Deliverables - *Taking the Pulse® Europe*

- ❖ **Ability to provide input and feedback into survey if subscribed by 15 September 2006**
- Comprehensive reference deck (200+ PPT slides)
- Executive management summary (75+ PPT slides)
- European *Physician Market Trends* Analysis
- Two custom specialty or country-specific segmentations
- Access to historical data
- Ten analyst inquiry hours – direct access to research analysts for data cuts and questions
- Client webinar data presentation
- Strategic briefing - either customized webinar or onsite (travel expenses assessed separately)
- Customized client portal access
- Methodology & data tables
- Excel & SPSS data files

PharmiWeb Solutions Charter Subscriptions

| | | |
|--|---------|---------|
| ▪ Level One - <i>Taking the Pulse® Europe v6.0</i> | €24,000 | £16,000 |
| ▪ Level Two - <i>Taking the Pulse® Europe v5.0 & v6.0</i> | €35,000 | £23,000 |
| ▪ Level Three - <i>Taking the Pulse® Europe v5.0</i> | €12,000 | £8,000 |

Physician Research - Taking the Pulse® Europe

Taking the Pulse[®] Europe

United Kingdom ■ France ■ Spain ■ Italy ■ Germany

For more information, contact
PharmiWeb Solutions

T +44 (0)1344 667433

E info@pharmiweb.com

