Get Granular for a Better Understanding of the COMPETITIVE LANDSCAPE

Whether preparing for the introduction of a new product or assessing an in-licensing opportunity of an existing brand, companies want to evaluate the competitive landscape to determine the promotional resources that will be needed to succeed competitively. With leaner sales forces and physician access becoming more restrictive, it is imperative that the tools a pharmaceutical company uses to measure the pharmaceutical landscape have increased precision.

Yet companies often still analyze data that is not sufficiently granular. Looking at detail volume against an entire specialty instead of a subsegment of targets can hide important opportunities for efficiencies. Similarly, conducting promotion response analyses utilizing national-level data will yield an average promotional response that by default makes the erroneous assumption of a homogenous competitive environment across all geographies. But we know each unique product portfolio can result in vast differences in how individual companies deploy their personal promotion resources.

Pharmaceutical companies expend considerable resources segmenting and targeting specific physicians, and their competitive landscape analysis should take those targets into consideration. Market research reporting and analysis should reflect a company's unique physician universe, physician deciling, physician segmentation, and sales force alignment. Furthermore, the sample mix of the market research should be stratified by geography, specialty, and prescribing level in order to provide the most effective coverage of the critical physician segments driving prescribing activity.

Uncover Unforeseen Opportunities and Threats

Looking only at national-level share of sales force details fails to uncover both opportunities and threats. Conversely, knowing your share of voice regionally or at a physician-segment level can help companies optimize brand performance.

EXAMPLE 1: According to marketer Forest Laboratories, sales of Lexapro were $2.3 billion in fiscal 2011, and the product is due to reach patent expiration later this year. To supplement Lexapro sales, Forest launched Viibryd (vilazone HCl tablets) for the treatment of adults with major depressive disorder at the end of June 2011.

The top two drugs promoted for the quarter ending November 2011 among both psychiatrists and primary care physicians within this market were Viibryd and Cymbalta. Between just these two products, Viibryd obtained a 58% share of details when compared with Cymbalta, with a 42% share. However, shares of details ranged regionally from a share of 70% in Northern California to a low of 50% in Southern Florida (See Table 1).

Looking at this type of information regionally can uncover opportunities for alternative resource allocations to meet geographically specific needs. It can also imply the need for changes in regional managed care, sales, and marketing strategies.

EXAMPLE 2: Further isolating high- and low-value physicians reveals that the high share of voice within the Northern California region can be attributed to a higher rate of de-

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Table 1
Regional Viibryd Share of Details (%)
Quarter Ending November 2011

Region	Share%
Northern California	70%
Texas	66%
Virginia/Maryland	66%
Northern Florida	64%
Los Angeles	59%
Nation	58%
New York	58%
San Diego	56%
Illinois	54%
New Jersey	53%
Southern Florida	50%

Source: MPA Sales Force Promotion Audit, Campbell Alliance Group, Inc.

tailing among lower-value physicians. In addition, the high-value share of details in Northern California is significantly below the national average (See Tables 2 and 3).

Vast differences exist in the way individual companies deploy their personal promotion resources. The above granular information uncovers even more precise strategies that could be employed. A regional analysis can identify the need for different market access strategies, and a physician-segment level analysis can uncover the opportunity for more efficient resource deployment.

Ongoing Measurement and Assessments Are Essential

The competitive landscape can fluctuate as competitors actively revise their strategic plans. As a result, conducting a competitive analysis has value at all stages of the product life cycle. Early on, during a product's development, examining the competitive landscape of the product can provide insight into your competitor's portfolio share of voice among your key target physicians, how your competitors have shifted product promotion efforts in the past in response to market events, or the perceived formulary access and ease in prescribing of competitive products.

At this point it will be possible to begin sales force sizing by looking at the average call frequency of the competition, promotion responsiveness, the percentage of "high-value" physicians your competitors are reaching, and the geographies and physician segments in which competitors are most focused. A promotion audit with a robust panel size and primary market research will also assist in your forecasting and budget planning by providing insight into the optimal share of voice needed regionally and the types of materials competitors are using to aid their detail discussions.

At launch and beyond, the analysis can get more granular, looking at how your brand's share of voice compares in selected regions or physician segments vs. nationally. A promotion audit and primary market research can look at the average call frequency of the competition and how this compares with your field force activity. It can also look at the percentage of "high-value" physicians you are reaching and how this compares with the competition.

The landscape analysis can also provide valuable competitive intelligence, such as the key messages physicians are recalling about your brand vs. the competition, whether representatives compared your product with a competitive product and the topics of that comparison, and how detail frequency correlates with perceptions of formulary access. Market research can also assist in your profitability analyses as you consider whether your field force resources are optimal in specific regions, how your brand's national or regional share of voice correlates with the brand's prescription share, and the impact of sales force size on share of voice.

Conclusion

Every company has its own unique needs and questions it must answer when examining the market in which its product competes. Actionable market research will tap into a large panel of physicians in order to more effectively dig down to the granular level of detail necessary to paint an accurate picture of the competitive landscape as it pertains to a company's specific target physician audience in the regions that matter most. By utilizing a segmented, regionally stratified approach to conducting a competitive landscape analysis, pharmaceutical leaders can feel confident they are entering into their competitive gaming scenarios sufficiently well armed.

To conduct a thorough systematic landscape analysis, it is critical to have the right processes, frameworks, and tools, including a multi-disciplinary team of professionals. Companies should rely on competition experts who have experience in comprehensive competitive analysis, strategy, planning, and execution. These professionals can provide the right methodologies, frameworks, and tools to help facilitate and lead a competitive analysis process. PV

About The MPA Sales Force Promotion Audit

The MPA Sales Force Promotion Audit is a syndicated service composed of a large panel of office- and hospital-based physicians representing 15 specialty segments. By tapping a large panel of specialty physicians, MPA provides a host of useful metrics, including company call and product detail volume, share of voice, product detail position, physician reach, call and detail frequency, and much more. The sample mix is controlled within each specialty and region, providing enhanced coverage of the critical physician segments driving prescribing activity.

Only MPA offers reporting and analyses that can reflect a specific customized physician universe, physician deciles, physician segmentation, and sales force alignment. All MPA analyses and reports are custom-designed to address specific client questions and needs.

Table 2 — High-Value Physicians

Regional Viibryd Share of Details (%)

Quarter Ending November 2011

Region	Share%
Virginia/Maryland	70%
Los Angeles	69%
Northern Florida	65%
Texas	61%
Illinois	59%
Nation	58%
New York	56%
Southern Florida	53%
New Jersey	52%
Northern California	51%
San Diego	50%

Source: MPA Sales Force Promotion Audit, Campbell Alliance Group, Inc.

Table 3 — Lower-Value Physicians

Regional Viibryd Share of Details (%)

Quarter Ending November 2011

Region	Share%
Northern California	78%
Texas	70%
Virginia/Maryland	63%
Northern Florida	63%
New York	59%
San Diego	59%
Nation	58%
Los Angeles	54%
New Jersey	53%
Illinois	49%
Southern Florida	49%

Source: MPA Sales Force Promotion Audit, Campbell Alliance Group, Inc.

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