



we show you the way

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# Market Analysis®

## Pharmacies in Europe & Worldwide

Offer 2016



## Your Benefits at a Glance

- ✓ Overview of the development of the **total market** and the **specific segments**.
- ✓ **Country specific information** and characteristics of the market
- ✓ Details about **Pharmacies** types, revenues, employment, profitability
  - Total Revenue per Pharmacy
  - Regional Differences
  - Total Market in Country, Number of Pharmacies
  - Product Group Splits
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.





# Content

- Market Structure – Retail #1 & Customer Preferences #2
- Methodology
- Sample Charts
- References
- Interconnection Consulting



# Market Analysis – Available Markets

## Regular Countries

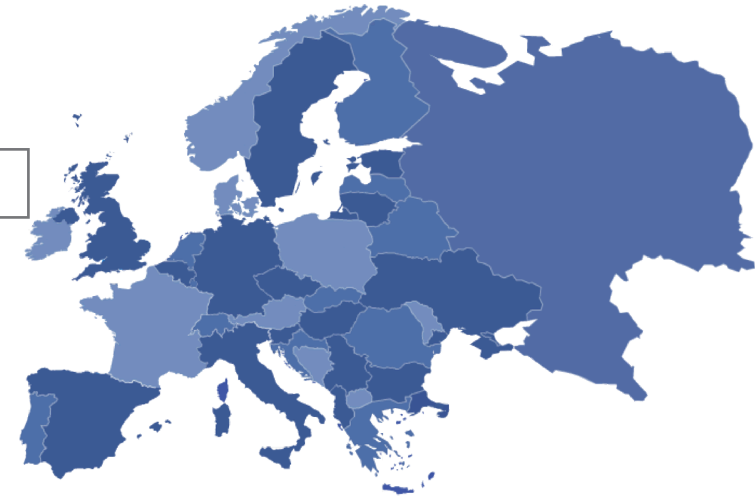
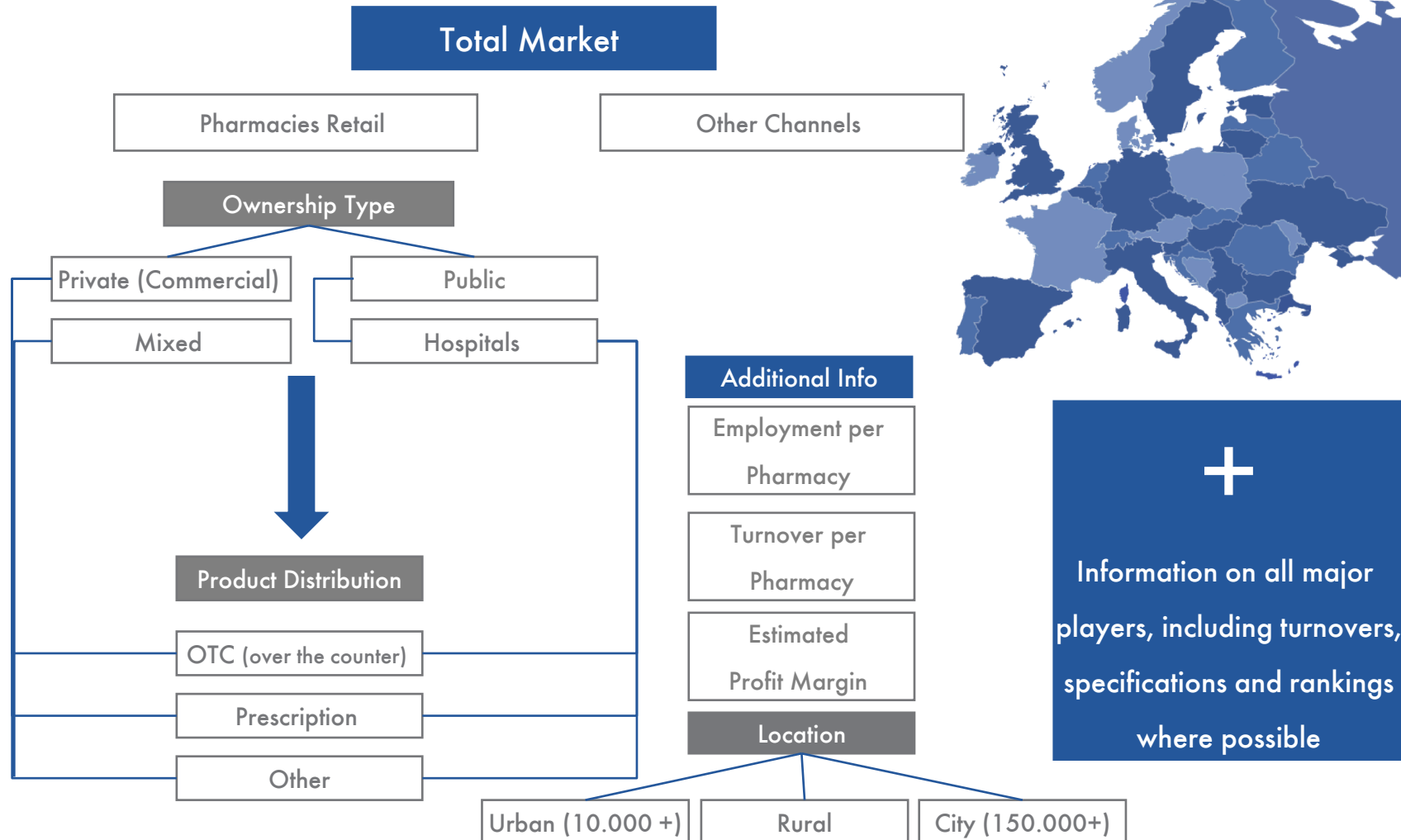
Austria	Belgium	Bulgaria	Bosna & Hercegovina	Croatia
Czech Republic	Denmark	Estonia	Finland	France
Germany	Greece	Hungary	Ireland	Italy
Latvia	Lithuania	Luxembourg	Monte negro	Netherlands
Norway	Poland	Portugal	Romania	Serbia
Slovakia	Slovenia	Spain	Sweden	Switzerland
United Kingdom	Ukraine	Macedonia	Malta	Cyprus
Russia	Belarus	Turkey	USA	Canada
Brazil	Australia	Japan	South Africa	Any other region

## Premium Countries

\*If desired, all countries available even on regional levels

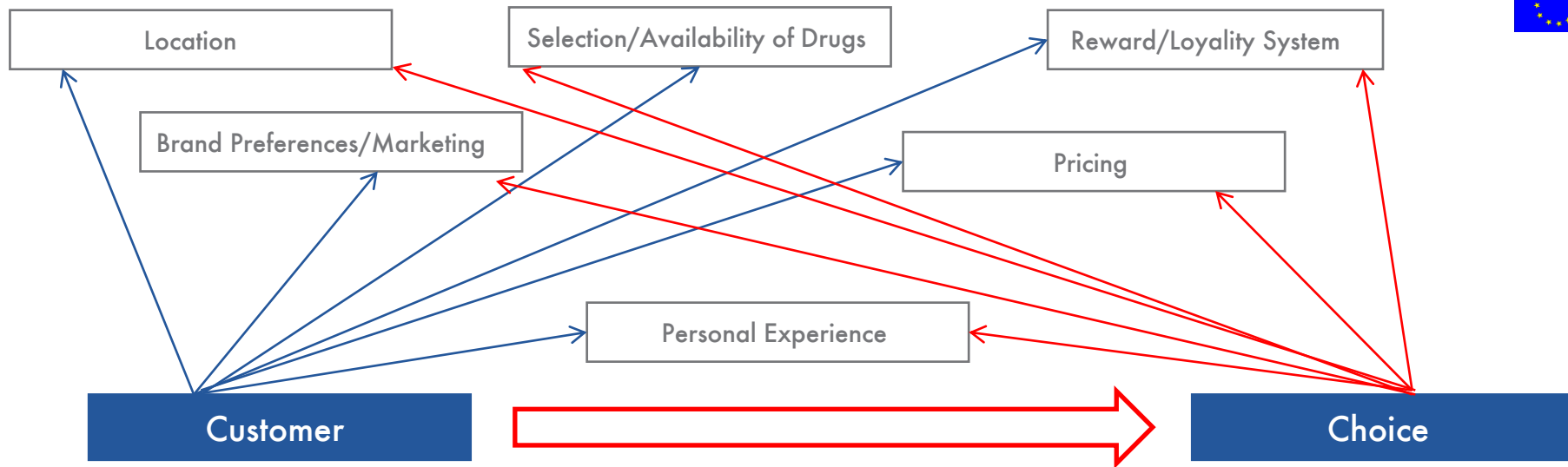


## Structure of the Market Analysis – Retail PART #1





## Customer Analysis – Customer Preferences PART #2



When selecting Pharmacy, customer has many choices to decide. What are the factors during the decision making process? What it would take to change a pharmacy or try a new one? Is brand loyalty more important than price? How does this vary among different countries or even across the continent? Interconnection offers you the opportunity to identify trends and extend knowledge about particular market in visualized charts, rankings and detailed description of customer preferences.



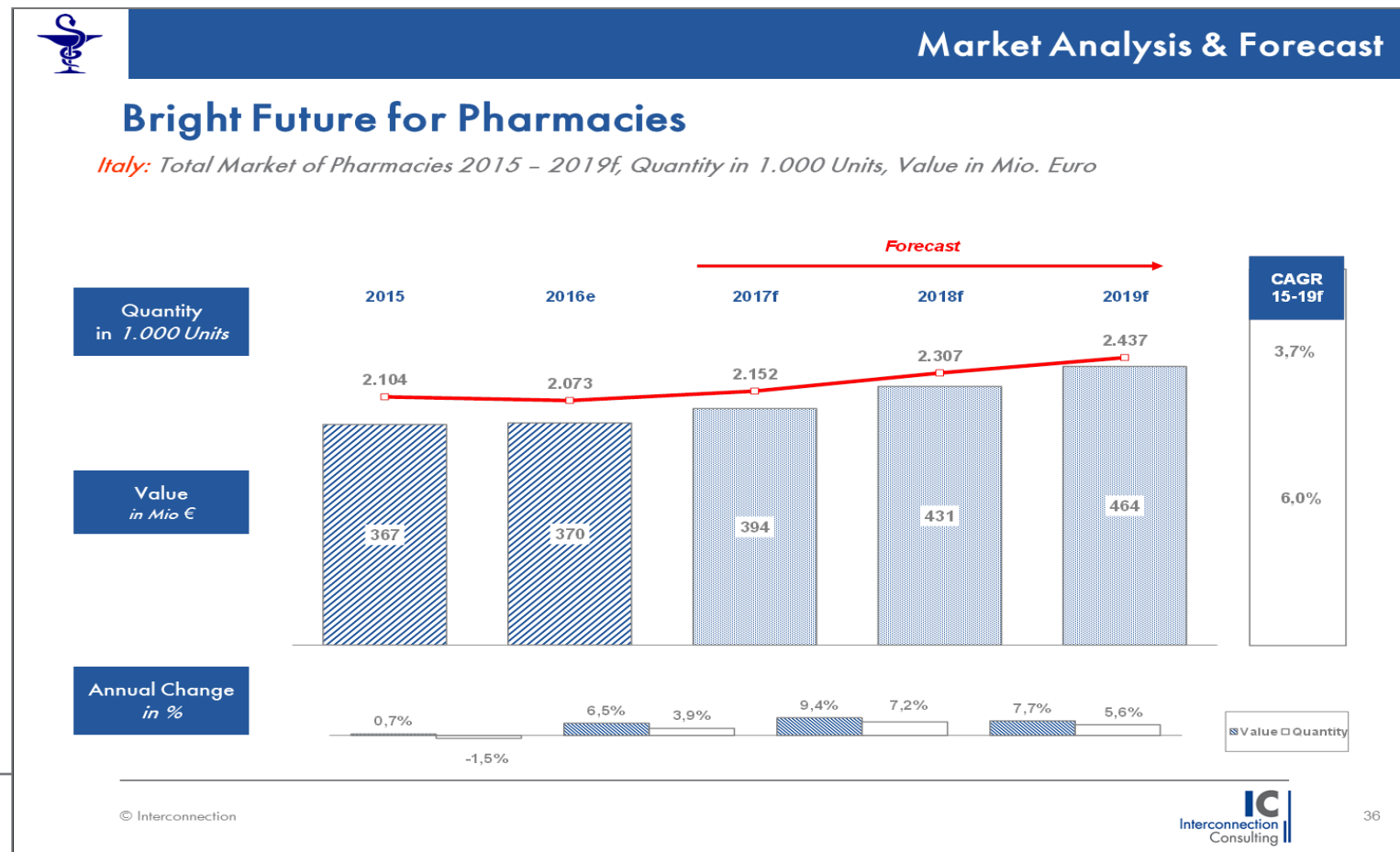
## Definition and Demarcation

OTC	<u>O</u> ver the <u>C</u> ounter drugs. Medicine which can be bought by decision of patients, includes but is not limited to pain killers, sore-throat medicine...etc
Prescription	Drugs and medicine which can be dispense only if corresponding receipt from doctor is presented. Most of this medicine is partially or fully subsidized by (public) insurance resources
Others	Other products sold in pharmacies (mugs, thermometers, candy..etc)
Rural:	Pharmacy presented in settlement with 9.999 inhabitants or less
Urban:	Pharmacy presented in settlement with at least 10.000 but no more than 150.000 inhabitants
City:	Pharmacy presented in settlement with more than 150.000 inhabitants
Parapharmacy:	Type of pharmacy where selected OTC medicine and alternative (f.e folk) medicine is sold along with other products associated with health (herbal tea mixtures, etc.)
Private Ownership:	Pharmacy run on commercial base, owned by certified pharmacist
State Ownership:	Generally owned by some public authority, presented in less populated regions, where then it is subsidized, in specific cases, even privately owned pharmacies can be subsidized if it is in public interest
Net profit:	Profit after all payable taxes, fees, costs and so on.
Qualified Employee:	Employee in Pharmacy, who is eligible to dispense prescription drugs, He/She has degree in Pharmacy
Collection of Data:	Data will be collected via telephone interviews, online panels, official fillings, electronic questionnaires. Number of interviews per one country is in range of 50 – 120 (depends on the country specifics), number of interviews for PART #2 is in the range of 500 – 1000, depends on specific definition for each country.



## Total Market Increases after Years of Decline

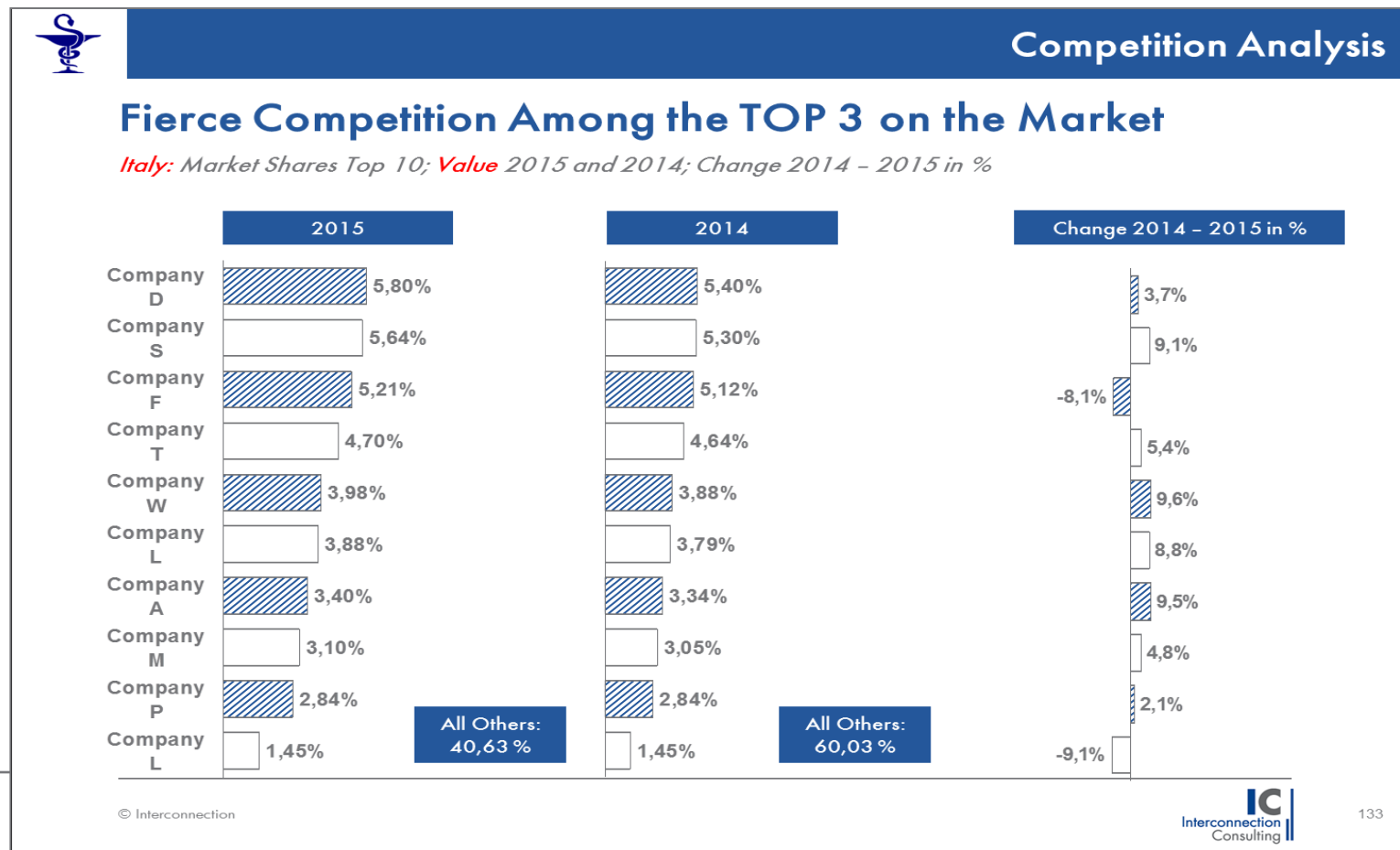
- Overview of the total market in terms of quantity (number of pharmacies) and value
- Development until the current year and forecast for the upcoming three years
- This chart shows dummy figures.





## Competition Analysis and Market Shares on Suppliers

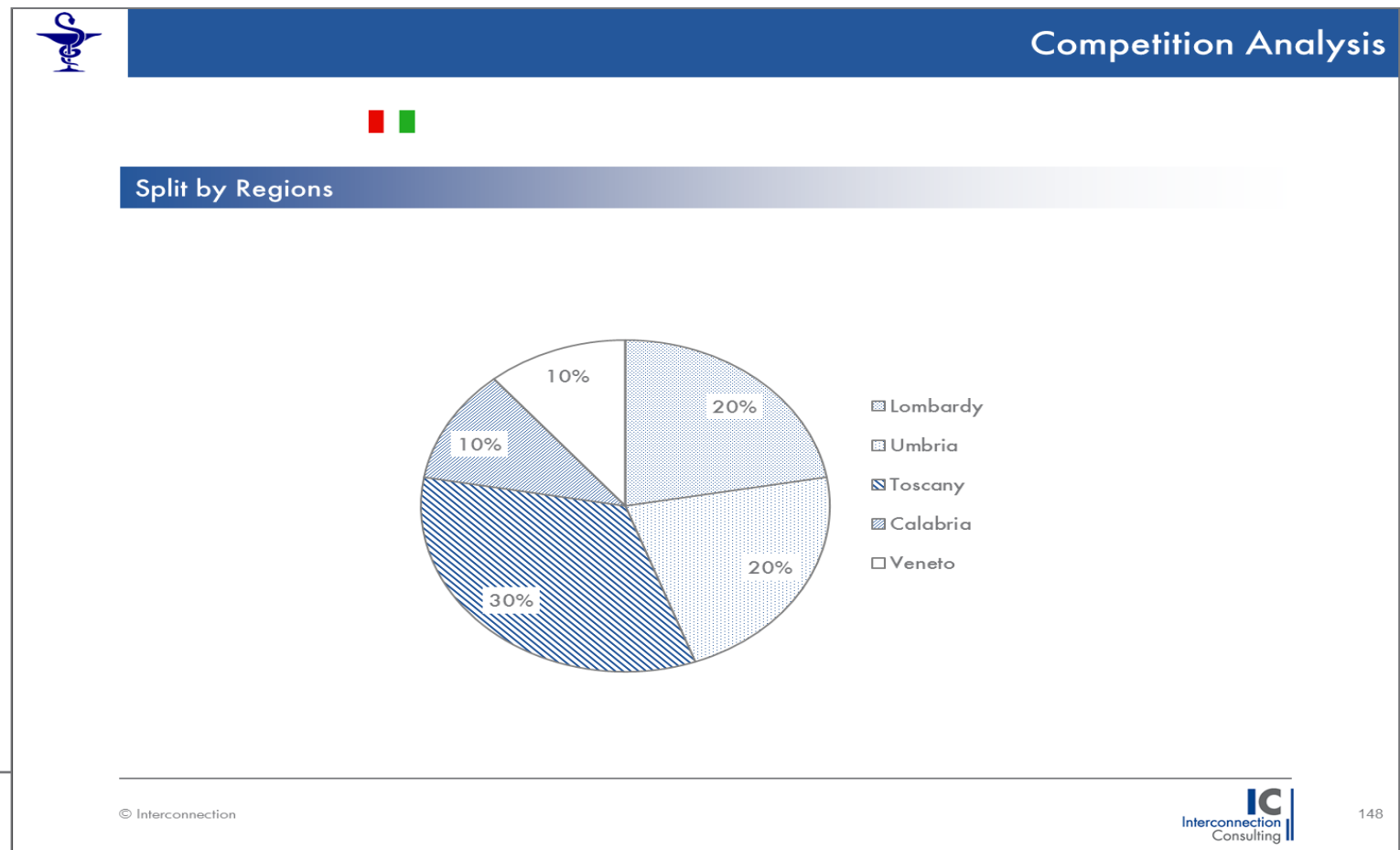
- *Market Shares of the Top 10 companies in Italy*
- *This chart shows dummy figures*





## Split by Regions

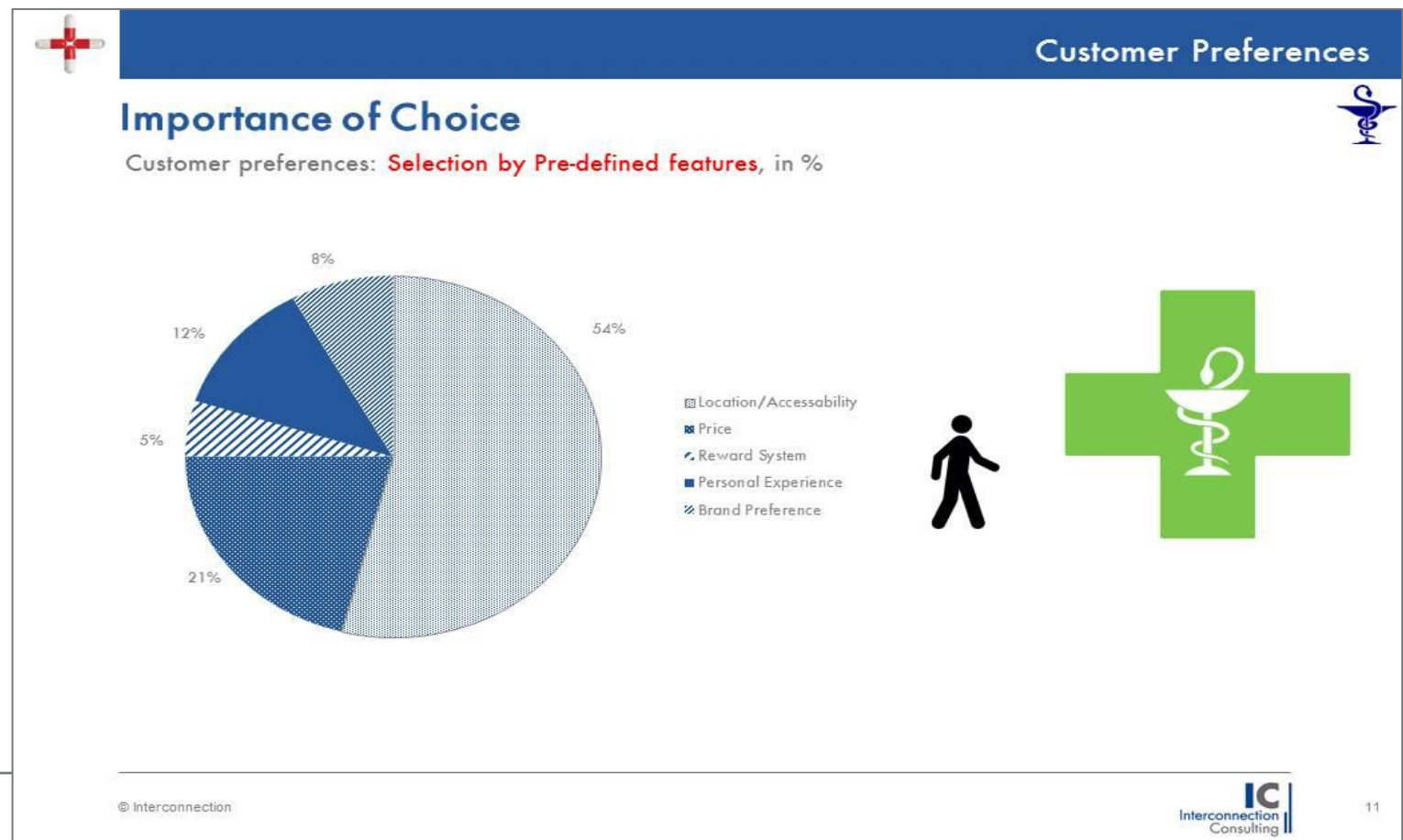
- *If desired, IC can provide you with data on regional level - Split among different regions in Italy*
- *This chart shows dummy figures*





## Importance of Choice

- Importance of different factors for customer decisions
- This chart shows dummy figures





# IC Market Analysis® Pharmacies in Europe & Worldwide 2016

PART #1		PART #2	
	Reg. Price		Reg. Price
Regular Country	€ 6.249,-	Regular Country	€ 5.999,-
Premium Country	€ 7.999,-	Premium Country	€ 7.499,-
PART #1 + PART #2 (for same country)		Scale of Discount	
	Special Price **		
Regular Country	€ <del>12.248,-</del> 10.299,-	€ 10.000,- 5 %	
Premium Country	€ <del>15.498,-</del> 13.149,-	€ 13.900,- 15 %	
		€ 20.000,- 25 %	
		€ 32.000,- 35 %	

\* SUBSCRIPTION: Annual price for at least two orders of the study (order year and the following year). Automatic discount of 20% for your total order applies of the Regular Price. The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically. Possibility of FREE biennale (switch) subscription upon request.

\*\* Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax. Other pricing option and combinations available.



*„Long experience and a deep insight of the construction markets constitute the quality of Interconnection studies“*

Bernd Blümmers – Directeur General, Saint-Gobain Solar Systems

## Selected Customers





## Interconnection Consulting

- ... is an international operating consulting company.
- ... has longtime experience in the field of multi-language marketing research and market analysis.
- ... is regularly conduction market studies about the European, Asian and American construction industry.
- ... has an internal interview center with trained and experienced interviewers .
- ... can exhibit reference projects from different industries and regions.
- ... applies the cutting-edge multivariate methods to analyze data.
- ... offers professional visualization and interpretation of the results.
- ... supports you with the implementation with the results in specific strategies.



## 1 Interaction With Clients

The Kick-Off Workshop with our clients guarantees that we have the same objectives and therefore ask the right questions to the right respondents. Regarding multi-client reports, clients can influence research design and focus very early on in the process.

## 2 Validation of Data

Data is collected from multiple sources (Desk Research; interviews with dealers, manufacturers, and suppliers) and therefore crosschecked, in order to provide high validity of data.

## 4 Follow-Up Validation

Upon completion manufacturers are contacted in order to gain feedback and continuously improve quality and research design.

## 3 High Degree of Transparency

Our clients are welcome to visit us whenever they wish and attend our call-center during primary research. All interviews are documented in detail and obtainable (available as SPSS File).



Member of ESOMAR and VMÖ (Ass. Of Austrian Market Researchers)



## Market Analysis



Market Volume  
Market Shares & Entry  
Competition Analysis

## Distribution Analysis



Channel Map  
Distribution Matrix  
Margins

## Customer Insight



Focus Groups  
Buying Motives  
Customer Benefits

## Market Forecasts



Indicator Models  
Life Cycle Models  
Econometric Analysis

## Brand Analysis



Brand Scorecards  
Brand - Triangle  
Brand Affinity

## Customer Satisfaction



Importance/Satisfaction  
Portfolios  
Customer Loyalty  
Customer Typology

## Price Research



Price-Sales-Function  
Price-Simulation-Tool  
Optimal Pricing

## Web**ver**stärker



E Commerce Insights  
Search Engine Marketing  
Web Channel Analysis



For further questions,  
please do not hesitate to contact us

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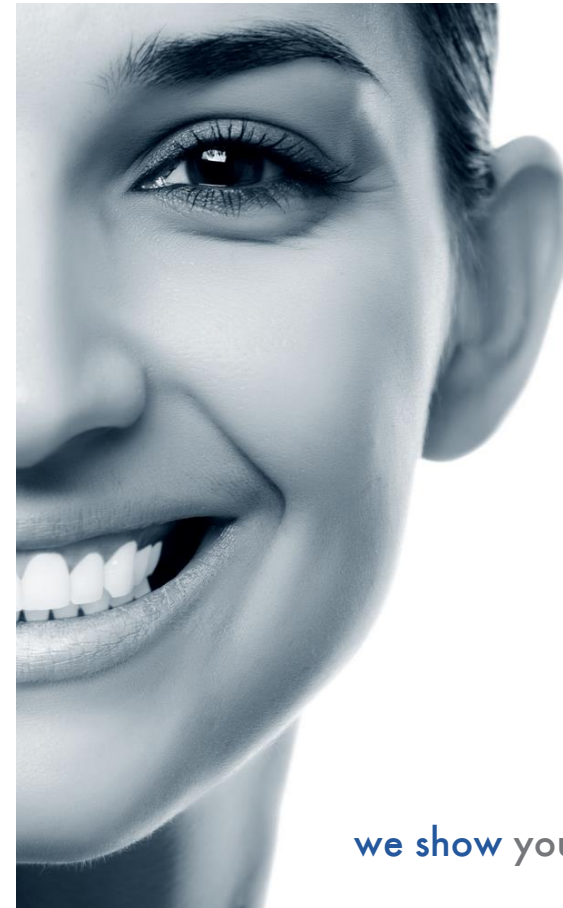
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