

Edition November 2008

HealthCare

Contents

Austria

Health typology Austria – The majority of Austrians who are ill are not interested in health related information

Czech Republic

In the view of the patients Czech health care is worse!

How do we perform with regard to obesity?

Sales Force Effectiveness (SFE) studies – a hot topic for market research

Hungary

Segmentation-Targeting-Positioning with Therapy Behaviour

Poland

Replinsight, a modern tool for successful SFE' monitoring Methodological Implications

Romania

Romanian Health Services Evaluation

Serbia

OTC Market in Serbia

Slovakia

Stressed Slovaks put the blame on too much responsibility and financial problems

Dear Readers,

It is our particular honour to present this year's edition of the GfK CEE Newsletter HealthCare which takes a look at recent survey results and tool innovations within GfK HealthCare in the CEE Region. With its network operating in 19 CEE countries, GfK is the only market research agency which is able to assist you in all your needs concerning health research projects within the entire CEE region. More than 40 health researchers throughout the region are occupied gathering solution-oriented information on health related topics.

SFE, the really hot topic in the entire pharmaceutical industry, is this year's special research topic and is presented in an article which gives an overview of various methods for the evaluation of the efficiency of sales reps in general and introducing a really unique tool to measure the quality of calls by sales reps, Replinsight®, which has been rolled out in Austria already and will be launched in several CEE countries within the next few months.

Finally you can learn about a very sophisticated branding tool which has been developed by our Hungarian colleagues. In our 2008 edition, you will find results about the perception of the national health systems in Romania and the Czech Republic and some local results relating to the indications obesity and stress.

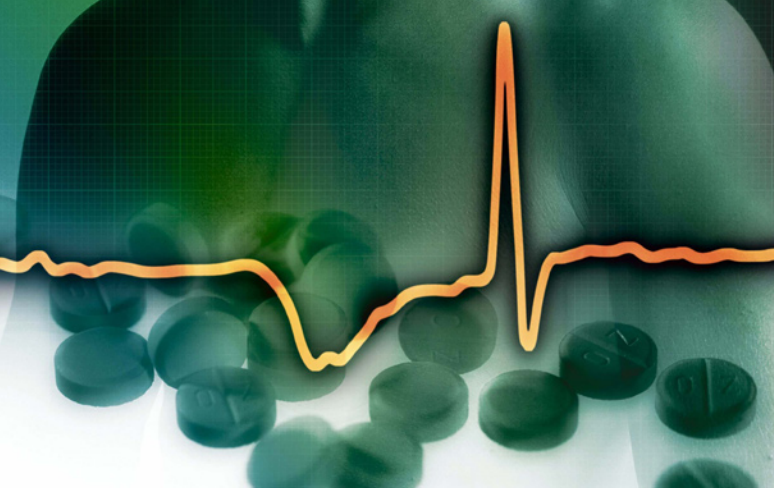
We are confident we are offering you an interesting selection of relevant CEE issues within the HealthCare Division and hope it will provide you with stimulating content and useful information for future challenges!

Yours sincerely

 **Astrid Essl, GfK Austria, CEE Team Leader HealthCare**

You can find further information about the findings of our studies under www.gfk.at or via the links from this site to the web sites of all the GfK companies in Central and Eastern Europe. [e-mail us](#)

 GfK Austria	 GfK BH	 GfK Hungária	 GfK Praha	 GfK Skopje	 GfK Slovenija
 GfK CR Baltic	 GfK Bulgaria	 GfK Kazakhstan	 GfK Romania	 GfK Slovakia	 GfK Ukraine
 GfK Belgrade	 GfK Croatia	 GfK Polonia	 GfK RUS	 INCOMA (CZ)	



Austria

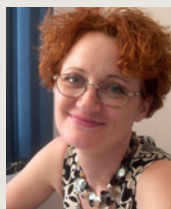
**Health typology Austria –
The majority of Austrians who are ill are not
interested in health related information**

A GfK Austria survey on the segmentation of the Austrian population with regard to health related behaviour and attitudes.

A survey among 4,000 Austrians of the age of 15 years and above shows that only 55% are interested in health related topics. The smallest segment comprises those ill persons who are very interested in health issues whilst the majority of the interested group is healthy and not suffering from any major chronic diseases. One in five is sane but anxious about the fact they may suffer from a serious disease in the near future. The main influencing socio-demographic factors are age, income and level of education.

[▶ read more \(pdf\)](#)

People



Svitlana Zhakhalova

Svitlana Zhakhalova has been a Senior Research Manager in the Consumer Goods Research department since June, 2008. Within the CR department she is responsible for the health care sector as head of the Ukrainian HealthCare team. Other positions she has occupied include Brand Manager in the Nycomed representative office in Ukraine and Research Project Manager for COMCON Pharma – Ukraine (Pharmaceutical and HealthCare market research).

She studied medicine at the Ukrainian National Medical University, graduating with honours. (Telephone: +380 44 230 02 60-1114; mobile: +380 672 166 414)

E-Mail: [▶ svitlana.zhakhalova](mailto:svitlana.zhakhalova)

Czech Republic

In the view of the patients Czech health care is worse!

Controversial reform of the Czech health care system has started. Has patient satisfaction changed?

GfK Praha has been monitoring the level of satisfaction of citizens with regard to the quality of their health care for the last three years. The company bases its research on representative questioning within the population (GfK Omnibus). The sample of 1000 respondents over the age of 14 years is chosen using a Random Address method and the research is the basis for the Health Care Satisfaction Index (HCSI).

[▶ read more \(pdf\)](#)



How do we perform with regard to obesity?

The average value for Body Mass Index is at the upper limit of normal. Obesity, corpulence, extra kilograms – all these are expressions we can read in the media. The individual terms are not only related to the aesthetic inadequacies but also apply in the context of many of the health problems in the population today. As a nation, we have taken some small steps in the last three years with respect to improvements in terms of body weight. At 24.8, the average value for body mass index (BMI) is not far from the upper limit of normal.

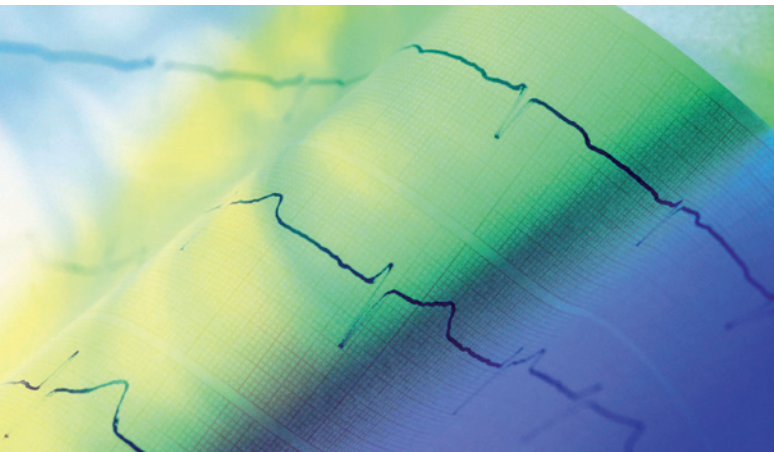
[▶ read more \(pdf\)](#)

Czech Republic

Sales Force Effectiveness (SFE) studies – a hot topic for market research

One of the goals of a product strategy is to consolidate the product image. This is achieved by communicating what the product offers and how it is distinguished from the competition. Manufacturers use various tools to do this such as mailings, advertising, presentations at symposiums and conferences, lectures and promotional material. Any and all activities are in compliance with the product strategy and with the intention to communicate the same messages in a uniform way. The sales reps represent one of the most important tools of such marketing communication. Their activities in the promotional and communication fields for the individual products lead, to some extent, not only to the purchase of the products themselves, but also to building up a wider awareness of these products.

[▶ read more \(pdf\)](#)



Hungary

Segmentation-Targeting-Positioning with Therapy Behaviour

The process of Segmentation – Targeting – Positioning (STP, known as the fundamental rule of marketing) is also widely used for pharma brand building. According to recent marketing literature, the most efficient means of segmentation is based on the customers' perceived task or job to do. In the classical example of Theodore Levitt, the customer needs a hole in the wall not a drill, and the job is the hole making, not the drill usage. Similarly, the job for a physician may be achieving some reduction in blood pressure rather than achieving a target blood pressure, and doing so by using any of the antihypertensive.

[▶ read more \(pdf\)](#)



Poland

RepInsight, a modern tool for successful SFE' monitoring Methodological Implications

Healthcare is an industry with an imperative need for accurate, timely and reliable information which is the essence of successful decision making in the pharmaceutical sector.

Today's fast pace of change in the promotional messages left by the reps from pharmaceutical companies is reflected in the wide range of such messages, the greater weight of quality of the message at the cost of visit frequency, the trend to shorten the average length of visit and the unwillingness of doctors to participate in SFE (Sales Force Effectiveness) telephone surveys. All these factors have an influence and, as a result, lead to a need for modifications of the traditional methods used to monitor this leading form of promotional activity carried out by pharmaceutical companies.

[▶ read more \(pdf\)](#)

Shortcut



GfK RepInsight®

Interested to learn more about our innovative tool to measure the quality of your calls and improve the content of your details?

[▶ more information](#)

Romania

Romanian Health Services Evaluation – 23 % of all Romanian citizens did not see a doctor last year

Alarming news from Romania: when asked how often they went to the physician last year, 23 % of the respondents said they had not consulted a doctor at all and a further 20% had made only one visit in 2007.

Romanians who do visit a doctor are most often over 55 years of age, generally retired persons or women. At the opposite end of the scale we find persons with higher incomes who are much less likely to seek medical services.

[▶ read more \(pdf\)](#)



Slovakia

Stressed Slovaks put the blame on too much responsibility and financial problems

Stress, often described as a 21st century disease, is a direct result of today's hectic lifestyles and the increasing demands of one's environment. In October 2008, GfK Slovakia has conducted a survey via online interviews with 500 respondents aged 15 to 60 exploring how Slovaks perceive and experience stress.

The findings of the online survey show that more than half of all Slovaks feel stress often, with 15 % of them claiming to be stressed very often.

[▶ read more \(pdf\)](#)

Serbia

OTC Market in Serbia

According to a survey carried out by GfK among a nationally representative sample of 1,000 respondents, almost 80% of the people living in Serbia are in the habit of buying non-prescription medications (so-called OTC drugs). Still, even these medications are primarily selected on the basis of a physician's advice.

[▶ read more \(pdf\)](#)

Comments

If you would like to make any comments about our Newsletter or if any other colleagues in your company are interested in our E-Mail News please let us know.

[▶ cee_newsletter@gfk.com](mailto:cee_newsletter@gfk.com)

GfK CEE-Newsletter is published for registered subscribers. This is not a spam mail. If you want to unsubscribe this newsletter, go to [▶ unsubscribe](#).

Impressum:

Editor in Chief: Sabina Nassner-Nitsch; © 2008 GfK Austria GmbH