



Raise your Game Expand your Horizons

The 24th European OTC Conference
& Action Workshop



Nicholas Hall's
 **INSIGHT**

London 17th-19th April 2013

Grange City Hotel, a stone's throw from the Tower of London

LONDON – THE PLACE TO RAISE YOUR GAME...



“ We invite you to join us at the 24th *Nicholas Hall's Insight* European OTC Conference & Action Workshop, to be held in London, which is enjoying a buzz from an eventful 2012, having celebrated the Royal Wedding, Diamond Jubilee and Summer Olympics.

Like athletes, it is essential that OTC marketers raise their game to stay ahead of the competition. With improved marketing, shopper insights and distinguished advertising campaigns, all players should aim to keep customers inspired, and explore new categories and territories to expand their horizons.

Raise your Game – Expand your Horizons

You kick off with an optional one-day Action Workshop, focusing on OTCs for key demographics: Children's OTCs, Men's Health and Women's Health. The main Conference brings you insightful presentations as speakers share their experiences and expertise. With an international group of 150+ delegates, this is a great opportunity to network.

What's more, we now offer **two** dedicated Networking Sessions by popular demand, enabling you to pre-book meetings in advance with other delegates of particular interest to you and your company. Last but not least, we will present our Annual Awards for Marketing, Innovation and Creativity.

The venue of this year's Conference & Action Workshop is the Grange City Hotel, a 5-star hotel located at Tower Hill, in the heart of City of London's cultural centre, with multiple transport links so you won't be far from the capital's attractions. The Conference concludes with a half-day sightseeing tour taking in some of the many world-famous sights that London has to offer.

I look forward to greeting you in London in April. ”

Nicholas Hall

Nicholas Hall
Chairman & CEO
Nicholas Hall Group of Companies

...AND EXPAND YOUR HORIZONS

THE ACTION WORKSHOP

Focusing on Children's OTCs, Men's Health and Women's Health

Wednesday 17th April 2013

09.00 – 16.00

The focus of this optional one-day workshop will be on three key cross-sections of society and the OTC offerings targeted at these demographic groups: Children's OTCs, Men's Health and Women's Health. These three target groups offer both opportunities and challenges to OTC marketers across the globe, and will be explored by the workshop moderators.

Led by Nicholas Hall in association with Josephine van Vreeswijk and Professor Ian Banks, this workshop will be fully interactive, with opportunities for discussion and debate, round-table discussions and networking opportunities.

19.00 Registration & Welcome Drinks

CONFERENCE DAY 1

Thursday 18th April 2013

08.30 Registration & Coffee

09.00 Opening Address & Annual Report

In his keynote speech, Nicholas Hall will review the current status of both the European and global OTC market, showing the emerging trends in the industry. He will announce the latest OTC market data hot off the press from newly-published *DB6 2013*, and provide a challenging vision of the future. Nicholas will also discuss the "hot topic" of the moment during his session, and include a summary of the key findings from the previous day's Action Workshop, presented by moderator Josephine van Vreeswijk.

Chairman: Nicholas Hall

10.15 *Nicholas Hall's INSIGHT Creative Award Voting and Marketing Awards Presentation*

Colin Borg introduces this year's shortlist for the Creative Award and invites delegates to cast their votes (result will be revealed on Day 2). During this session we will also present our annual Nicholas Hall European New Product of the Year Award and *OTC.Newsflash* Worldwide Marketing Award, with detailed case studies of the winners and runners-up. This session really is all about "ideas in action" and cutting-edge innovation.

Colin Borg, Managing Director, Ladybird Cottage

To enter your brands for the Awards, please contact Jennifer O'Donnell, E: jennifer.odonnell@NicholasHall.com or visit our website www.NicholasHall.com

10.45 Coffee

11.15 *OTCs & Men's Health*

Knowing only too well that men are more difficult targets for OTC marketers and other healthcare providers, Ian Banks has called on the UK NHS health service to "digitise" the offerings to men with a range of internet-based services and applications. Exploring the current situation for men's health across Europe, he will suggest ways in which OTC marketers can engage with the typical male consumer to create a new customer base in both local and global markets.

Professor Ian Banks, President, European Men's Health Forum

12.00 *From Mosaics to Profit Generation – A Case Study within the European Consumer Health Industry*

In this insightful presentation, Ola will present a case study on how to improve profits by describing a number of important parameters. His key message is the need to focus on the following: identify your core brands and strategic markets, sharpen the organisation by launching a straightforward matrix structure, speed up decisions, enhance "authority" and acknowledge the importance of an efficient supply chain. Ola Erici, Industry Advisor, formerly CEO, Ferrosan

12.45 Lunch

13.45 *How Integrating Science and a Flexible Business Model can lead to Probiotic Success!*

In this case study from Sweden's Probi AB, Michael and Niklas explain the key strategy components behind Probi's penetration of both the consumer health and functional foods sectors. They will review how extensive research and a clinical focus on probiotic strains can be integrated into a flexible approach to business modelling, to create a company which has been delivering sustainable growth across these two industries.

Michael Møller Jensen, Regional Sales Director & Niklas Bjärum, Sales & Marketing Director, Probi

14.30 *Looking for New Niches in the Global Nasal Market*

Segment: A Case Study

Georges Bouille presents a fascinating insight into nasal saline products & technology which until now, despite being a multibillion-dollar business, has remained somewhat under the OTC radar. Nasal saline has achieved high OTC growth over the past few years, surprising many established marketers. In this presentation, Georges will explore the real drivers of today's nasal saline success, its subtle positioning against medicated remedies and why its attractiveness is shaping a new business era.

Georges Bouille, VP Business Development, Consumer Health Care Division, Aptar Pharma

15.00 *How Global Brands can Masquerade as Local Brands to Maximise ROI*

In this thought-provoking presentation, PGT's Richard Learwood will provide the ultimate guide to creating value across your portfolio by joining up the behind-the-scenes elements that the consumer and pharmacist doesn't see. He will explore the ways in which you can read the scale benefits of a global approach without sacrificing heritage and trust. Richard will draw on examples from the FMCG and OTC industries to demonstrate how launches can be adapted to local markets in order to achieve a sense of differentiation, creating what appears to be a "local" brand.

Richard Learwood, Global Director Brand Strategy & Innovation, PGT Healthcare

15.45 Summary and Close

16.00 *Coffee Break & Networking Hour*

A dedicated Networking Session, for which you can pre-book meetings with delegates of special interest to you and your company (the delegate list will be distributed prior to the meeting for this purpose). You can book meeting slots during the early part of the Conference (until lunchtime on Thursday 18th). For this reason, we ask delegates to submit a portrait photograph to the conference team in the weeks prior to the meeting. More information is available on request from jennifer.odonnell@NicholasHall.com.

17.00 *Conference Day One ends*

19.15 *Delegate Dinner*

The delegate dinner will take place at the Medieval Banquet where you will be provided with traditional entertainment ranging from sword fighting knights to dancing wenches. Delegates should meet in the hotel lobby at 19.15 for a short walk to St Katharine Docks where the restaurant is located.

CONFERENCE DAY 2

Friday 19th April 2013

08.00 Coffee

08.30 *Insight into OTC Shoppers Behaviour Across the Globe*

Nicholas Hall's global joint-venture partner, Nielsen, here presents the exclusive results of a global shopper insights survey specially commissioned for this conference, to be conducted in Q1 2013 across 56 countries globally. This groundbreaking study will explore shopper purchasing behaviour in order to discover frequency of OTC

consumption, understanding and awareness of OTC offerings, as well as evaluating the role of the pharmacist in influencing the consumer's final OTC purchase. This research also aims to investigate whether the turbulent economic circumstances of so many global markets has had an impact on consumer's purchasing and usage of OTCs. The results promise to give all conference delegates a fascinating insight into the thought processes behind OTC consumption, and will of course be integral to informing your future strategy!

Stefano Galli, Global Business Partner, The Nielsen Company

09.15 *How Home-Use Devices can be a Real Opportunity for the OTC Market*

In the current challenging business climate, OTC and Big Pharma players have begun to refocus their strategies away from the holy grail of blockbuster drugs. Instead they have begun to focus more on outsourcing innovation, forming product and capability partnerships to minimise risk, a new focus on customer solutions rather than science-driven therapeutics, and a greater emphasis on integrated decision-making. In doing so, many players have chosen to reassess the OTC market and take a look at new opportunities, such as home-use devices. Unlike the traditional molecular development of an OTC drug, these devices have quicker development cycles and have a lighter regulatory burden, and in some cases fit the growing consumer demand for lower-risk natural products. This presentation looks at the growth of this technology, current strategic partnerships that have developed in this space, and the potential of home-use devices to be the next disruptive technology.

Susan D'Arcy, Managing Director, Pacer Therapeutics

10.00 *Coffee Break & Networking Hour*

A second opportunity to continue your discussions with other conference delegates. As with the Networking Session on Day 1, you can pre-book networking meetings by contacting jennifer.odonnell@NicholasHall.com.

11.00 *The Changing Regulatory Landscape*

Industry expert James Hall will present an up-to-date analysis of regulatory changes and their ramifications for the OTC industry. He will also give an insight into pharmacovigilance, and review where the industry may see changes in the near future and the implications this will have.

James Hall, Chief Pharmacovigilance Officer, JensenR+

11.45 *How to Inspire with your OTC Marketing*

It is essential that OTC marketers keep up with the competition by ensuring they use the latest online applications and social media tools at their disposal alongside traditional marketing techniques to keep their campaigns alive. In this inspiring presentation, Andy will review the latest and most successful OTC campaigns, and explore ways in which OTC marketers can, and do, utilise social media to heighten brand awareness and engage with their consumers.

Andy Hayley, Managing Director, TBWA / Paling Walters

12.30 *Creative Awards Presentation*

12.45 *Summary & Close*

13.00 Lunch

14.15 *Sightseeing Tour:*

Coach tour incorporating the classic sights of Central London, including the London Eye, Trafalgar Square, Tower of London, St Paul's Cathedral, Houses of Parliament and Big Ben. This is a 3-hour tour on a coach with stops for photos.

Delegates will be asked to meet in the lobby at 14.15, with coaches leaving promptly at 14.30. The tour will commence immediately, returning to the hotel at around 17.30. Delegates who do not wish to return to the hotel can leave during the tour.

Nicholas Hall & Company Guernsey reserves the right to make changes to the conference agenda.

Book before 1st March
SAVE UP TO £200

Book 3 places
GET A 4th PLACE FREE

PAY BY CREDIT CARD
ENJOY A 5% DISCOUNT

Sponsorship packages available,
contact us for further details
Two dedicated one hour networking sessions

Welcome to the City of London – some of the key landmarks close to the Grange City Hotel



1 HMS Belfast This Royal Navy battle-cruiser from the second World War is now a living museum moored in the Thames opposite the Tower – nine decks of seafaring history.



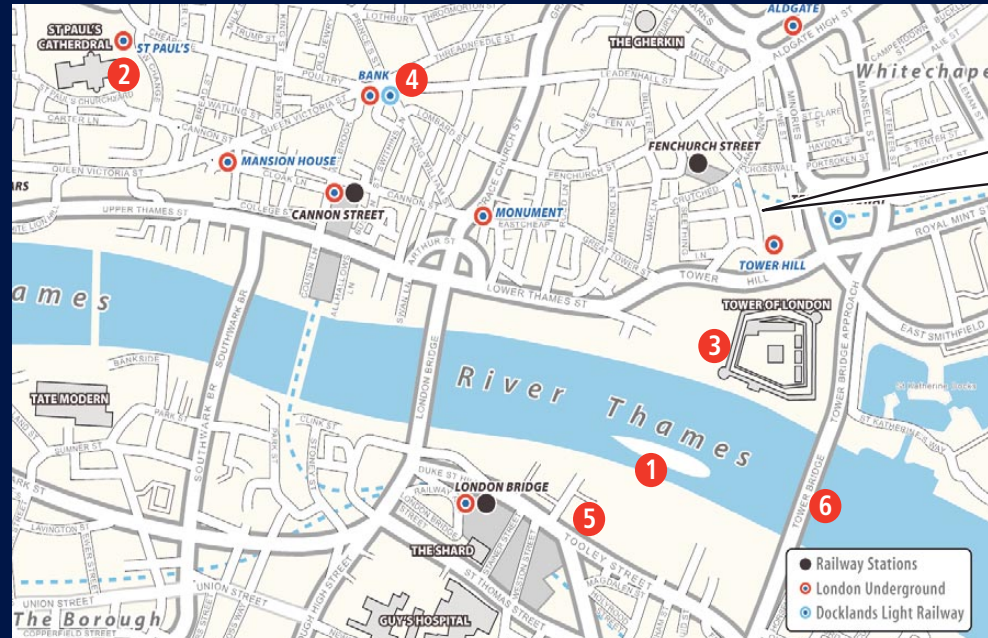
2 St Paul's Cathedral Christopher Wren's masterpiece, built between 1675 and 1711 after the Great Fire of London. The dome rivals that of St Peter's Basilica in Rome.



3 Tower of London The Tower dates back almost a thousand years, steeped in the history and intrigue of centuries. Home of the famous Beefeaters and the Crown Jewels.



4 Royal Exchange The historic Royal Exchange, between the Bank of England and the Lord Mayor's Mansion House, is now home to the Grand Café and upmarket shopping.



5 The Shard A daring concept by architect Renzo Piano, the Shard is Europe's tallest building at 309.6m (1016ft). Superb views from a gallery 245m up on the 72nd floor.



6 Tower Bridge One of London's great Victorian engineering achievements, the Olympic rings suspended from its towers formed the iconic image of London 2012.

GRANGE CITY HOTEL, LONDON



The conference will be held at the Grange City Hotel, a 5-star hotel located in the heart of London, with unique panoramic views of the city and just around the corner from the historical Tower of London. The hotel is within walking distance of shops, bars, restaurants and major transport links. The hotel offers a superior standard of accommodation and services, and provides a perfect blend of comfort and style.

Airport transfer time varies, although we would recommend delegates fly to London City airport where possible. By car, transport time is around 40 minutes from London City, one hour from Heathrow and ninety minutes from Gatwick airport, although we would also advise people use the train links from the airports where possible – we can send you full information on these options when you book your conference place.

We have negotiated a preferential room rate for our conference delegates, which is also available immediately before or after the meeting in case you wish to extend your stay.
General hotel / reservation details:-

Grange City Hotel, 8-10 Cooper's Row, London, EC3N 2BQ.

T: +44 (0) 20 7863 3700 F: +44 (0) 20 7863 3701

E: city.reservations@grangehotels.com

W: <http://www.grangehotels.com/hotels-london/grange-city-hotel/grange-city-hotel.aspx>

Nicholas Hall & Company offers the world's most complete OTC marketing & business solutions

Our services include:

Consultancy, Licensing & Acquisition

With 34 years experience in the consumer healthcare industry across the globe, Nicholas Hall & Company has unrivalled expertise and detailed knowledge. We offer wide-ranging consultancy services in OTC business development including market entry strategies, partner profiling and licensing and acquisition searches. A growing number of clients large and small, global and local, rely on our advice to help grow their businesses.

Competitive Intelligence & Market Analysis

Designed to meet individual company needs, CIMA tracks OTC developments across specified companies, categories and regions. We work with you to define the optimum content and frequency for your company – working closely with you to design your company strategy.

DB6 Global OTC Database

Our unique sales database is dedicated to OTC and is currently used by 12 of the leading global OTC marketers. It contains sales & forecast data across 62 countries, providing market intelligence, analysis and insight. Nielsen has licensed its entire OTC market data to Nicholas Hall & Company, further strengthening the database in a number of important countries and categories, so helping you to support investment decisions.

Nicholas Hall Reports

With the latest information on OTC healthcare, our reports provide analysis of key trends, and guidance for strategic planning on a global, regional or local scale – with detailed coverage by category, by company and by brand.

Nicholas Hall's OTC TalentSelect

We are actively working in the global consumer healthcare industry and are uniquely positioned to advise in middle / senior management and executive placements. We have a global talent pool and an extensive network of contacts to help our clients find the best candidates available. We protect our relationship clients' interests and never make unsolicited approaches to their employees.

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Nicholas Hall's INSIGHT

Our unrivalled reporting sets the industry benchmark for covering the world's OTC markets with four B2B publications: Asia-Pacific, Europe, North America are published monthly, and Latin America bi-monthly. In-depth comment and analysis helps you chart a profitable course for your brands in highly-competitive local & regional markets.

OTC.Newsflash

Used by many multinationals daily, this subscription-only weekly bulletin brings you 25-30 of the most important OTC industry developments covering product and company news, M&A activities, essential insights from Nicholas Hall and flash data from **DB6**. *OTC.Newsflash* keeps you informed about the world of OTC without information overload.

OTC.NewDirections

Sent directly to you via email, this subscription-only fortnightly news bulletin is produced in association with JensonR+, specialists in the application and management of national and international drug licensing procedures. It brings you a selection of the latest and most important news in regulatory, switch and scientific affairs.

Nicholas Hall's Network Partners

Our collaboration with independent consultants, marketing and regulatory agencies around the world, specialising in OTC medicines, consumer healthcare and personal care, enables us to offer expertise at local level across the world.

Conferences & Action Workshops

Discover, share and debate the latest topics, trends and opportunities with an international group of delegates. Events are designed to leave attendees well informed about new trends and innovative ideas for building successful and profitable OTC brands.

For more details, visit www.NicholasHall.com
or email info@NicholasHall.com

Nicholas Hall
Benchmarking the world of OTC