

Nicholas Hall's

NEW PARADIGMS FOR CHC 2019

Over the Horizon

A Signature Report by Nicholas Hall



Nicholas Hall
Executive Chairman
& Creative Solutions Director,
Nicholas Hall Group of Companies

Nicholas is founder and CEO of the Nicholas Hall Group of Companies, an elite consulting, business intelligence and executive recruitment company primarily serving the consumer healthcare industry since 1978. After a career in marketing and general management with Procter & Gamble, Vicks and GD Searle, Nicholas set up his own company, which has remained resolutely independent as it has expanded and flourished. Throughout that time Nicholas has managed the company's consultancy practice, which has among its clients many blue chip OTC companies, as well as some of the leading local laboratories in Europe, Asia, Middle East and Latin America. He has more than four decades of experience in the healthcare industry and has chaired and moderated over 300 conferences and seminars in 58 countries.

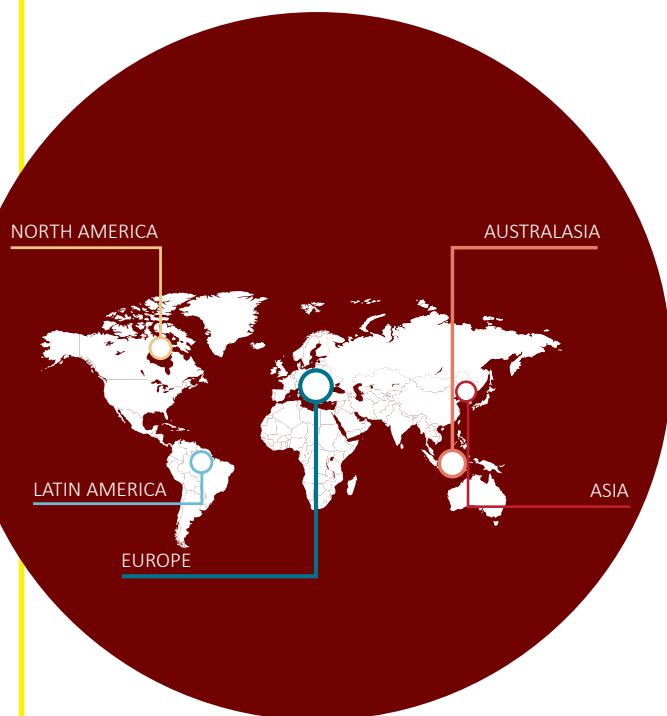
We are pleased to announce our latest Reports title will be *Nicholas Hall's New Paradigms for CHC 2019: Over the Horizon*, personally written by Nicholas himself! Focusing on a wide range of major issues surrounding the CHC Market, including Innovation, Distribution, Digital Engagement, Competition and much more, this is an essential read for all players striving to compete in this evolving marketplace.

Pre-order at the Early Bird rate by 20 November and save up to GB£7,000.

Publication date: May 2019

- Purchases of a global licence include a confidential 2 hour webinar of key findings presented by Nicholas Hall personally.
- Additional customised presentation via webinar / in-house workshop conducted by Nicholas Hall from £10,000.

Enquiries: melissa.lee@NicholasHall.com



1. CHC Market – Situation Report

- 2014-18 • What happened in 2018
- North America • Europe • Japan • Australasia
- Model 1 (DtC) vs 2 (OTx)

2. Emerging Markets

- Overview • BRICITS • 2nd tier (Poland, Mexico, etc) • The new 3rd tier (Nigeria, Iran, Bangladesh, etc) • How to succeed in the Emerging Markets

3. Healthcare Trends

- Increases in allergy, obesity, diabetes, autism, ADHD, etc. • Medical provision • State vs private medicine • Big Pharma • Influences on the consumer

4. Engaging with the Consumer

- Demographics • Lifestyle • Prevention
- The Ageing Consumer • Women vs Men
- The declining birthrate • Shopper insights

5. How to Innovate (at last!)

- Why CHC isn't innovating • Recent best practice • New delivery systems • Medical devices
- Diagnostics

6. Regulation

- The overall trend to deregulation and reregulation • Harmonisation vs regional differences • FDA • New medical device legislation

7. Rx-to-OTC Switch

- Why switch? • Switch models • USA vs ROW: Can switch be profitable only in USA? • Recent switches: what went right / what went wrong?
- Europe's central procedure • Advisory OTCs
- What's coming down the pipeline • Changes to healthcare structure • Key Performance Indicators

8. Adjacent Categories

- Sexual health • Medical cannabis • Smoking control / e-cigarettes • Obesity & diabetes
- Nutraceuticals & nutritionals • Food intolerance
- Cosmeceuticals • Natural products • Immunity and detox • Sleeping disorders • Mental health, mood & stress

9. Distribution

- Dealing with powerful chains • The challenge of global retailers • Pharmacy buying groups
- Private label • Retail Category Management
- Technology – how retailers use information gleaned from consumers

10. Pharmacy Point-of-Care

- Pharmacy – the bedrock of the OTC market
- Evolution of pharmacy • PPOC – turning pharmacies into health centres • Third Class in the USA • In-store clinics – a US phenomenon

11. e-Commerce

- Information • Influence • A product to be sold

12. Direct Selling

- Why does MLM have such high growth?
- Direct sales by CHC manufacturers, including subscriptions • The Internet of Things and for Sales

13. The Rainbow Effect

- Classic media is losing traction • Digital marketing • PR, word-of-mouth • Guerilla marketing / Viral / Spectaculars • Consumers – do we know their names? • Medical marketing • Detailing pharmacists • A million new ambassadors – pharmacy staff, nurses, auxiliaries

14. Digital Engagement

- Internet • Big Tech (GAFA) • Social Media – fans own it • Marketer-driven content • How consumers are finding out about brands • How it can all go wrong

15. Future Competition – it's not who you think!

- Why are the MNCs underperforming?
- Key regional / local marketers • Winners, Survivors & Losers • Profiles of top players • Stars of the future

16. M&A

- Are CHC acquisitions always a sideshow of Big Pharma? • Does M&A work? • Multiples • Buyers & Sellers • Role of private equity • Recent healthcare M&A deals

17. Managing Brands For Long-Term Profit Growth

- Building brand values, strengthening consumer loyalty • Is the CHC industry already generic? • Adding value, raising prices • International price comparisons • Umbrella branding and line extensions • CHC profitability • Building critical mass on a global scale

18. Success Factors

- The ideal CHC organisation • Brand success matrix • Looking after our people • Social responsibility • 10 Dos & 10 Don'ts

19. Case Studies of Success (& Failure)

- Case studies dotted throughout report

20. Looking Over the Horizon

- Disruption – Big Pharma, Big Tech, generics
- The most likely case
- The best case
- Strategy options
- Creative solutions
- Forecasts 2025, 2030 – a full Valuation Model
- Why invest in CHC?
- ... And finally



Priority Order Form for New Paradigms for CHC 2019 – Publication: May 2019

A global licence will be required if you wish to put this report on your company's intranet. The report will be sent to the purchaser in PDF format via a secure link. If a print copy is required, please request this upon purchase. All prices are quoted in British Pounds Sterling.

Please tick as appropriate. I would like to order:

Prices:	Early Bird* (order placed by 20 November)	Pre-Publication* (order placed by 20 March)	List Price
<input type="checkbox"/> Global Licence	GB£13,000	GB£17,000	GB£20,000
<input type="checkbox"/> Site Licence	GB£10,400	GB£13,600	GB£16,000
<input type="checkbox"/> Please tick if a print copy is required			

* To benefit from these prices, payment must be received in full before the offers end (20 November for Early Bird and 20 March for Pre-Publication prices)

DELIVERY DETAILS

Mr/Mrs/Ms/Dr/Other _____
First Name _____ Last Name _____
Job Title _____
Company _____
Address _____

Post/zip code _____
Country _____
Tel _____ Fax _____
Email _____

- Purchases of a global licence include a confidential 2 hour webinar of key findings presented by Nicholas Hall personally.
- Additional customised presentation via webinar / in-house workshop conducted by Nicholas Hall personally from £10,000.

PAYMENT DETAILS

- Please send me a secure link via PayPal so I can pay by credit card
- Please invoice my company quoting order number / reference:

(material will be sent on publication or, thereafter, when full payment is received)

VAT ID Number (EU only): _____

Signed: _____ Date: DD / MM / YYYY

If you do not wish to receive future information from us, please tick as appropriate: Mail Fax Email

Please fax the completed order form to +44 (0) 1702 220 241 or email to info@NicholasHall.com

T: +44 (0) 1702 220 200
E: info@NicholasHall.com
F: +44 (0) 1702 430 787
W: www.NicholasHall.com

Nicholas Hall Europe Limited
35 Alexandra Street,
Southend-on-Sea, Essex,
SS1 1BW, UK

 **Nicholas Hall's**
SIGNATURE REPORTS

Nicholas Hall's
NEW PARADIGMS
FOR CHC 2019
Over the Horizon