MASTER THESIS

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Degree Programmes
International Marketing & Sales Management
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B2B BRAND POSITIONING CONCEPT
with focus on integrated communication on the example of
Stölzle Glass Group in the French pharmaceutical market

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Graz, 29th June 2018

Declaration of authenticity

I hereby certify that I have written the present thesis independently and without help from any third parties. I have not used any sources other than those which are clearly indicated and have duly provided details of the sources of both direct and indirect quotations.

The present piece of work and parts thereof have to date not been presented to this or any other examination board in the same or similar form, nor have they been published. The present version is the same as the electronic version submitted.

Voitsberg, 29th June 2018 ………………………………..

Katja, Rudres

Principle of equality

For readability purposes, gender-specific formulations have not been used in the present piece of work. It is, however, hereby expressly stated that when the masculine form is used to denote people, both sexes are being referred to.

Acknowledgements

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Abstract

The French pharmaceutical market is the 5th largest market for human medicines worldwide and hence provides high potential for Stölzle Glass Group. Though the market conditions in France are very challenging, as differentiation from competition through quality or price can hardly be reached in the pharmaceutical glass packaging industry. To reach the company's growth and awareness target, Stölzle needs a brand positioning concept which differentiates the company from its competitors long-term. Thus, the objective of this master thesis is to develop a B2B brand positioning concept in the French pharmaceutical market.

The first part of this thesis deals with the theoretical background of a brand positioning concept. At the beginning, B2B brand management is described with a special focus on the international pharmaceutical industry. Afterwards, the definition of brand positioning and the five steps of a brand positioning concept are explained. In the first stage, brand positioning objectives and possible positioning strategy approaches are presented. Following that, brand positioning ideas and their requirements are described. Subsequently, the implementation of the brand positioning concept through integrated marketing communication is shown. The final chapter includes strategic and operative controlling measures.

The second part of this thesis includes the practical implementation of the brand positioning. Firstly, an analysis of the BU Pharma and an environmental analysis of the French pharmaceutical market, the target group and the competition are provided. Then, the findings of the primary market research are outlined which have been conducted through a quantitative research. In addition, the results of the image analysis are interpreted separately for the French as well as German/Austrian pharmaceutical market to generate comparative values.

Based on the theoretical part and the internal and external analysis, a brand positioning concept for Stölzle is developed. Four positioning alternatives are created which are evaluated by Marketing and Sales with a value benefit analysis. One positioning alternative is advised for Stölzle which best fulfils the positioning requirements. Subsequently, communication activities are suggested to implement the brand positioning. At the end of this thesis, controlling measures and further recommendations for Stölzle are stated.

Zusammenfassung

Der französische Pharmamarkt ist der fünft größte Markt für Humanmedizin weltweit und bietet daher großes Potential für die Stölzle Glasgruppe. Jedoch herrschen in Frankreich anspruchsvolle Marktbedingungen, da in der pharmazeutischen Glasverpackungsindustrie eine Differenzierung durch die Qualität oder den Preis nicht erreicht werden kann. Um das Umsatz- sowie Bekanntheitsziel von Stölzle zu erreichen, ist ein Positionierungskonzept mit einer langfristigen Differenzierung vom Wettbewerb in Frankreich erforderlich. Daher ist die Entwicklung eines Positionierungskonzeptes das Ziel dieser Masterarbeit.

Im ersten Abschnitt dieser Masterarbeit werden die theoretischen Grundlagen eines Positionierungskonzeptes behandelt. Anfangs wird das B2B Markenmanagement mit Fokus auf die internationale Pharmaindustrie erläutert. Anschließend erfolgen die Definition der Markenpositionierung sowie die Beschreibung der fünf Schritte eines Markenpositionierungskonzeptes. Vorerst werden die Ziele und Strategien einer Markenpositionierung erläutert. Danach werden die Positionierungsideen und deren Anforderungen behandelt. Darauf folgen die Umsetzung der Positionierung mittels integrierter Kommunikation und letztendlich strategische und operative Controlling-Maßnahmen.

Im zweiten Abschnitt dieser Masterarbeit erfolgt die praktische Umsetzung des Positionierungskonzeptes. Anfangs werden eine Analyse der Business Unit Pharma und eine Umweltanalyse zum französischen Pharmamarkt, der Zielgruppe sowie des Wettbewerbs durchgeführt. Im Anschluss werden die Ergebnisse der Primärmarktforschung präsentiert. Die Ergebnisinterpretation der Imageanalyse wird für den französischen und deutschen/österreichischen Pharmamarkt getrennt dargestellt, um Vergleichswerte zu schaffen.

Basierend auf den theoretischen Grundlagen und der internen und externen Analyse wird ein Positionierungskonzept für Stölzle erarbeitet. Vier Positionierungsideen werden entwickelt und mit einer Nutzwertanalyse durch Marketing und Sales evaluiert. Schlussendlich wird eine Positionierungsalternative empfohlen, die die Positionierungsanforderungen am besten erfüllt. Des Weiteren werden Kommunikationsmaßnahmen zur Implementierung der Positionierung aufgezeigt. Am Ende dieser Masterarbeit werden Controlling-Maßnahmen angeführt und weitere Empfehlungen für Stölzle abgegeben.

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List of Abbreviations

API	**=**	Active Pharmaceutical Ingredients
BU	**=**	Business Unit
B2B	**=**	Business to Business
CRO	**=**	Contract Research Organization
FDA	**=**	Food and Drug Administration
FMCG	**=**	Fast Moving Consumer Good
IMC	**=**	Integrated Marketing Communication
KPI	**=**	Key Performance Indicator
OTC	**=**	Over-The-Counter
PR	**=**	Public Relations
ROI	**=**	Return On Investment
USP	**=**	Unique Selling Proposition

1 Stölzle Glass Group

In 1805 Karl Smola set up the glassworks “Oberdorf“ in the Austrian town of Bärnbach, which can be considered as the basis of today’s packaging glass producer Stölzle Glass Group (cf. Stölzle Glass Group 2017f).

1.1 Company Profile

With more than 200 years of experience in the production of glass, Stölzle Glass Group is Europe’s only manufacturer of packaging glass aimed at Pharma, Perfumery & Cosmetics, Spirits, Consumer, as well as Tableware markets. With its headquarter in Austria, the Group employs 2.450 people worldwide and produces three billion glass containers yearly. The company is a One-Stop-Shop for the development, production and decoration of packaging glass and distributes glass containers including suitable closures in 74 different countries worldwide. With an export quota of 95.5%, the company generated a yearly sales revenue of € 310 million in 2016 (cf. Stölzle Glass Group 2017b; Stölzle Glass Group 2016c; Wildner 2017, p. 22-25).

Stölzle Glass Group is made up of six European production sites and three integrated decoration facilities located in Austria, Great Britain, France, Poland and Czech Republic. International sales companies in the USA and Russia enable Stölzle to provide a class leading customer service (cf. Stölzle Glass Group 2017b; Stölzle Glass Group 2017c).

1.2 Business Unit Pharma

With an export quota of 96%, Stölzle Glass Group is one of Europe’s leading packaging glass manufacturers for the pharmaceutical industry operating in 64 countries worldwide (cf. Stölzle Glass Group 2016a; Stölzle Glass Group 2016b).

1.2.1 Key Facts

Stölzle manufactures soda lime Type III primary packaging glass for the pharmaceutical industry in flint, amber and green glass. The standard product range includes dropper bottles, medicine and syrup bottles, injection vials and infusion bottles, as well as tablet and ointment jars, and wide mouth packers. In addition to standard containers, Stölzle manufactures a wide range of customized glass containers according to customers' specifications. Volumes range from 3.5ml up to 1000 ml bottles (cf. Stölzle Glass Group 2015; Stölzle Glass Group 2017a).

Due to the strategic importance of its Pharma business, Stölzle produces pharmaceutical packaging glass according to the international ISO GMP 15378 standard. Most of the production lines dedicated to pharmaceutical glass containers are equipped with laminar-flow technology, so that clean conditions are achieved. At the cold end section, various state-of-the-art inspection machines guarantee visual and mechanical quality controls of all bottles. Depending on customers' requirements finished glass containers are mostly packed in shrink packs and automatically palletized by robots (cf. Stölzle Glass Group 2015; Stölzle Glass Group 2017a).

1.2.2 Stölzle-Oberglas & Stölzle-Union – two dedicated Pharma plants

In 2016, Stölzle Glass Group redefined its strategic direction for all plants: The Austrian headquarters and the production site in Czech Republic were defined to be the plants dedicated to manufacture pharmaceutical glass (cf. Wildner 2017, p. 22-25).

Stölzle-Oberglas GmbH

Stölzle-Oberglas produces almost 1.5 billion glass containers in flint, amber and green glass per year. Stölzle-Oberglas employs 450 people and produces pharmaceutical packaging glass on ten production lines (cf. Stölzle Glass Group 2017d).

Stölzle-Union s.r.o

Stölzle-Union employs 280 people and produces 600 million amber glass containers per annum. All six production lines for pharmaceutical glass containers are equipped with state-of-the-art inspection and packaging machines (cf. Stölzle Glass Group 2017e).

2 Introduction

2.1 Initial Situation

Stölzle Glass Group is one of the leading manufacturers of pharmaceutical glass packaging in Europe (cf. Stölzle Glass Group 2016a). In 2016 the company generated a yearly turnover of € 70 million by selling 1.4 billion glass containers for pharmaceutical customers (cf. Stölzle Glass Group 2016b).

Studies show that the overall pharmaceuticals' market volume in 2016 was estimated at $ 1.105 trillion – € 935 billion (cf. Statista 2016a). Thereof 49% was generated in the US, 21.5% in Europe, 27.7% in Africa, Asia as well as Australia and 4.7% in Latin America (cf. Statista 2016b).

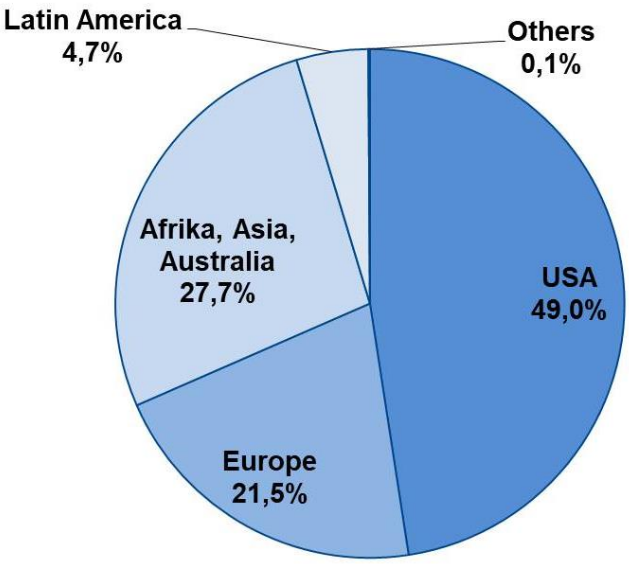


Figure 1: Worldwide Pharmaceuticals' Market Volume split into continents (based on Statista 2016b)

Out of the 21.5% in Europe – which are € 200 billion of the overall pharmaceuticals market volume – € 43.1 billion were generated in Germany, € 32.1 billion in France and € 28.8 billion in Italy (cf. Statista 2016c).

This statistics show that France – after Germany – is the second most attractive pharmaceuticals' market in Europe regarding sales revenue.

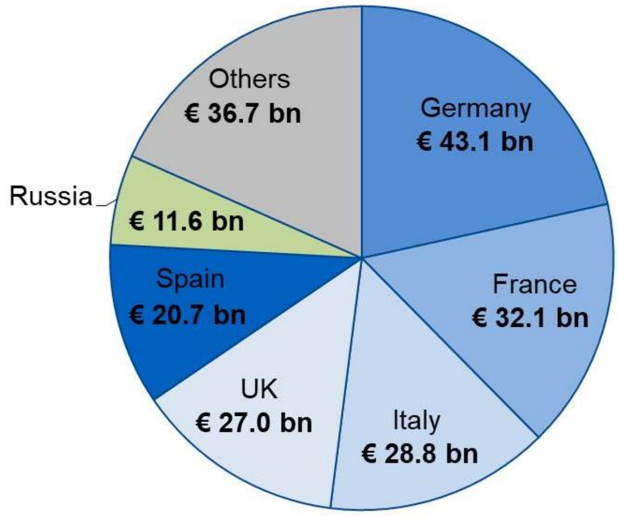


Figure 2: European Pharmaceuticals' Market Volume split into countries (based on Statista 2016c)

Yearly, USD 9 billion are spent on pharmaceutical primary glass packaging, whereof 16% are spent on Type III. This leads to a global market volume for Type III pharmaceutical glass packaging of € 1.4 billion (cf. Stölzle Glass Group 2017g).

The internal sales figures of Stölzle Glass Group show that the highest revenue troughout the pharmaceutical business is generated in the US – € 12 million – followed by Germany with € 11.6 million, while France is on the sixth position by generating € 3 million (cf. Stölzle Glass Group 2016b).

When it comes to primary packaging the most important thing for manufacturers is to guarantee zero interaction of the packaging with the drug (cf. Bahadur 2014, p. 480-485). In order to comply with those requirements all glass producers have to follow strict quality specifications according to ISO-GMP 15378:2011 (cf. TÜV 2017).

Furthermore, the biggest competitor and market leader in the pharmaceutical glass packaging sector SGD Pharma is defending its position in its home market France (cf. SGD Pharma 2017a). With two of five production sites located in France the company is firmly established on the French pharmaceutical market (cf. SGD Pharma 2017b). Besides, Gerresheimer and Bormioli Pharma run a production site in France, as well (cf. Gerresheimer 2017; Bormioli Pharma 2017).

2.2 Problem Definition

Since the French pharmaceutical glass packaging market is very competitive and the glass containers are exchangeable due to the legally regulated quality standards, it is hard for Stölzle to differentiate from competition. In addition, it is unknown how Stölzle is positioned and seen from the customers' perspective in comparison to its competitors.

In addition, there are three different glass types: Type I, II and III. Since Stölzle Glass Group produces only Type III glass the company’s glass bottles are not suitable for all medicines (cf. Stölzle Glass Group 2015). This is an competitive disadvantage compared to the competitors on the French market: SGD Pharma, Gerresheimer, Bormioli Pharma and Piramal Glass. These companies all offer Type I and II glass, as well (cf. Stölzle Glass Group 2016a).

Due to these facts, the company is not sure how to differentiate from competition and how to position itself on the French pharmaceutical market. This leads to the result that Stölzle lacks a brand positioning concept for the French pharmaceutical market. Furthermore, Stölzle Glass Group is missing an integrated communication concept on how to communicate their position.

For fully utilizing the existing potential of the French pharmaceutical market and improving the competitiveness, a new positioning concept is vital and the key to success.

2.3 Objectives

2.3.1 Company Objectives

The overall company aim is to double the annual B2B sales revenue from € 3 million in 2016 to € 6 million by the end of 2020 within the French pharmaceutical market by selling pharmaceutical glass packaging.

Another aim of the company is to achieve 100% aided brand awareness at the 10 biggest pharmaceutical companies in France by the end of 2020.

2.3.2 Thesis Objectives

The objective of this thesis is the development of a B2B brand positioning concept with focus on integrated communication on the example of Stölzle Glass Group in the French pharmaceutical market in order to achieve the company objectives.

2.4 Frame of Reference

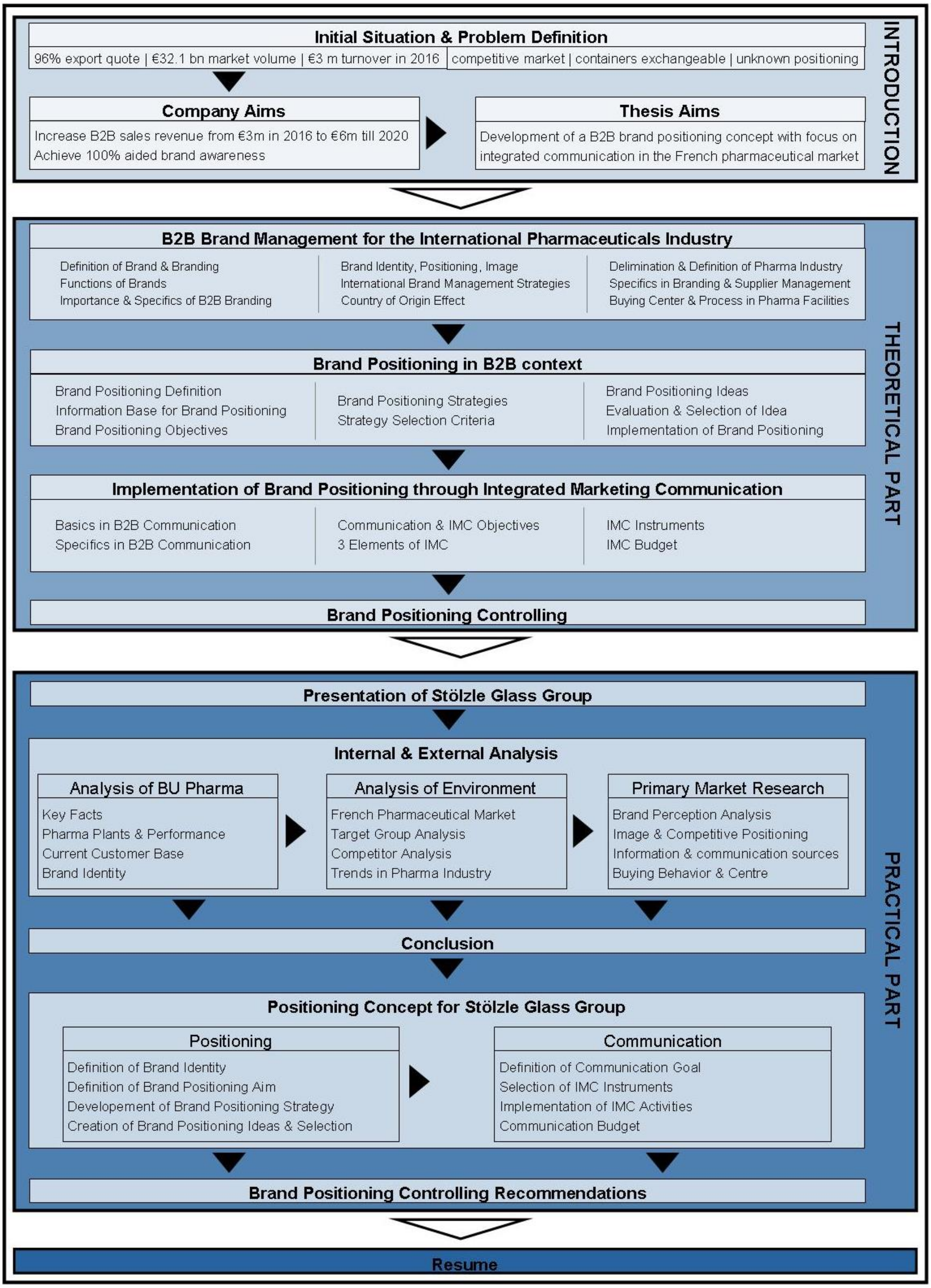


Figure 3: Frame of Reference (own presentation)

3 B2B Brand Management for the International Pharmaceutical Industry

Still many industrial companies think that the concept of brands only works for mass markets, high-consumption products and fast-moving consumer goods (FMCG). But a brand is an instrument for company growth as well as profitability and influences the buyers and prescribers in all industries (cf. Kapferer 2012, p. 51).

3.1 B2B Brand Management

3.1.1 Branding and Brand Definition

"From a business point of view, branding in the marketplace is very similar to branding on the ranch. A branding program should be designed to differentiate your product from all the other cattle on the range. Even if all the other cattle on the range look pretty much alike" (Ries/Ries 2009a, p. 1).

"Branding has been around for centuries as a means to distinguish the goods of one producer from those of another. In fact, the word 'brand' is derived from the Old Norse word *Brandr*, which means 'to burn' as brands were and still are the means by which owners of livestock mark their animals to identify them" (Keller 2014, p. 30). According to Kotler/Keller branding is defined as: "Branding is endowing products and services with the power of a brand" (Kotler/Keller 2009, p. 241).

"Branding means much more than just giving a brand name and signalling [sic!] to the outside world that such a product or service has been stamped with the mark and imprint of an organization. It requires a corporate long-term involvement, a high level of resources and skills to become the referent" (Kapferer 2012, p. 31). "Branding, though, is not about being on top of something, but within something" (Kapferer 2012, p. 31).

In fact, all authors describe branding as displaying a marking enabling the identification of a product or service. This thesis will be based on the definition of Kapferer, since it considers that brands are more than just labeling. It is about building a unique image of a product or service in the customer's mind which involves a value-enhancing effect to a product or service.

The term *brand* is often used in literature and defined in many different ways. According to the American Marketing Association a brand is: “Name, term, design, symbol, or any other feature that identifies one seller’s good or service as distinct from those of other sellers“ (American Marketing Association 2017a).

Kotler defines a brand as: "A brand is a name, term, sign, symbol, or design or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of the competitor" (Kotler 1997, p. 443).

“An industrial brand is to position the brand as a promise, as a set of expectations that the product offers a certain type and level of value“ (McQuiston 2004, p. 348).
“A brand is a singular idea or concept that you own inside the mind of a prospect” (Ries/Ries 2009a, p. 110).

“A brand is a distinctive identity that differentiates a relevant, enduring, and credible promise of value associated with a product, service, or organization and indicates the source of that promise” (Ward/Light/Goldstine 1999, p. 88).

This thesis is based on the definitions of Ries/Ries and Ward/Light/Goldstine. The combination of these two definitions expresses a broader and more-dimensional view on brands. Together they point out that brands are a unique image that a company owns in the customer's minds. In their opinion a brand differentiates a promise of value associated with a product or organization rather than only placing a visible marking enabling the identification of something.

3.1.2 Functions of Brands

In the past years effective brand management and especially the role of brands in the Marketing mix got increasingly important (cf. Perrey/Freundt/Spillecke 2015, p. 166). Most B2B purchases are risky because they are about components used to establish a product or service. As a result:

- the costs of such ingredients define the end price,
- the quality of the components determines the quality of the end product, and
- the reliability of the supplier affects the reputation of the brand (cf. Kapferer 2012, p. 81).

Derived from that B2B brands fulfil essential functions as shown in the table below.

Function	Benefit
identification	To be clearly seen and quickly identified
differentiation and profiling	To differentiate from competition with unique brand identity
cumulation/practicality	To simplify complex offers, to allow savings of time and energy
risk reduction and confidence	To create trust, to lower the perceived risk for the customer, to be sure finding the same quality level and buying the best product in its category
continuity	To create satisfaction in a relationship over time
identity-forming	To transfer soft facts like emotions, value, norms

Table 1: Functions of B2B brands for the customer (based on Masciadri/Zupancic 2013, p. 16; Kapferer 2012, p. 22f.)

One function of brands is to be quickly identified and clearly recognized by the customers. Since products and services in B2B are getting exchangeable and can be easily imitated by competition, an effective brand management provides points of differentiation for the customer. Furthermore, a brand communicates the core services of a company and therefore simplifies complex offers requiring explanations. This allows the customer to save time and energy. Hence, brands are an important guide when making decisions. The huge variety and complexity of services pose a risk for the customer which can be reduced by creating trust through a strong brand. In addition, a brand stands for a certain level of quality and gives the customers the feeling of buying the best performer for a particular purpose. Finally, in B2B the choice of the seller is no more only determined by functional benefits, but by soft facts such as emotions, value, norms, as well, which are transported through a brand (cf. Masciadri/Zupancic 2013, p. 16; Perrey/Freundt/Spillecke 2015, p. 166; Kapferer 2012, p. 22f.).

Furthermore, a brand is an essential value-adding factor for a company. This resulted from a global study carried out in 2011 by Simon-Kucher & Partners about pricing across industries. The outcome was that 65% of companies are not able to charge the prices they deserve for the value their products or services merit. This leads to a loss of 25% of profits. The primary drivers for a high pricing power are customer value and strong brands (cf. Tacke/Vidal 2011, p. 1f). Especially in the B2B chemicals industry decision makers are willing to pay a higher price level for strong brands. This makes their professional life easier, particularly by aggregating information and reducing the risk (cf. Perrey/Freundt/Spillecke 2015, p. 99f.).

3.1.3 Importance of B2B Brand Management

Nowadays the term *brand* is primarily used in connection with consumer goods and the B2C market. Thus, in the B2C sector more effort is put into brand management, even though the revenues made in the B2B sector are more than four times higher than in the B2C sector. The reason is that in B2B markets more value creation stages are involved and for the production of one consumer good many B2B preliminary stages are necessary (cf. Will 2010, p. 409; Masciadri/Zupancic 2013, p. 2).

The importance of B2B brands can be attributed to the fact that any decision made by people within an organization is influenced by brands in their private as well as professional life. Brands are especially important in professional decision making in order to reduce the personal as well as organizational risks. These risks consist of the high investment volume, complexity and time pressure (cf. Bausback 2007, p. 65).

A study from 2012 on the topic 'Brand Relevance in Global B2B markets' points out that brands, in relation to other purchasing factors, are an important element in the decision making process. The survey indicates that brands are less important than the price and the product but they remain on a par with sales as an influencing factor (cf. Perrey/Freundt/Spillecke 2015, p. 99-100).

In addition, a study of Richter on the topic 'B2B brand management in German B2B companies' from 2007 confirms the relevance of B2B brand management. The study identifies many weaknesses and deficits in brand controlling and positioning. Currently brand positioning focuses on exchangeable dimensions such as quality, customized solutions and services. Hardly no emotional aspects – which are also relevant in B2B – are considered when positioning a brand in the B2B sector (cf. Baumgarth 2010, p. 42-44).

Some B2B companies have already noticed the importance of B2B brands and took action. Main reasons are the ongoing globalization and the consequent competitive pressure which motivated many companies to build up unique brand images for their products or services (cf. Will 2010, p. 409).

3.1.4 *Specifics and Requirements of B2B Brand Management*

B2B brand management differs in some ways from the B2C brand management. The specifics can be divided in fundamental specifics and situative specifics. While fundamental specifics are about the industrial performance and marketing process, situative aspects deal with current practices in the B2B sector (cf. Baumgarth 2010, p. 48).

<u>Fundamental Specifics</u>

In comapris to the B2C sector the **market performance** in the B2B sector refers to heterogeneous services with a different level of complexity, individuality and risk. Consequently, the nature of the service needs to be considered within B2B brand management (cf. Baumgarth 2010, p. 48; Masciadri/Zupancic 2013, p. 28).

For instance, services in B2B include:

- commodities,
- speciality goods,
- low price and high price services,
- standard services, and
- services requiring explanation and interaction (cf. Baumgarth 2010, p. 48; Masciadri/Zupancic 2013, p. 28).

In terms of the **professional and organizational sourcing** the following aspects need to be considered – as shown in table 2.

Organizational sourcing (B2B)	Private sourcing (B2C)
Purchase done by organizations	Purchase done by private people
Derived demand based on downstream markets	Original demand
Low number of demanders on the market	High number of demanders on the market
Multipersonal/collective decisions (Buying Center)	Monopersonal decisions
High degree of formalization	Low degree of formalization
Lengthy procurement/decision making process	Short procurement/decision making process
More rational and factual decision criteria	More emotional decision criteria
High interaction between buyer and seller	Low interaction between buyer and seller
Higher individuality in performance	Lower individuality in performance

Table 2: Differences in organizational and private sourcing (cf. Baumgarth 2010, p. 48; Burmann/Launspach 2010, p. 166f.; Masciadri/Zupancic 2013, p. 28-31)

In contrast to the B2C sector in the B2B sector the demanders are organizations. The B2B market is driven by a derived demand for downstream markets and the number of demanders on the market is low. Furthermore, decisions in B2B organizations are usually collective decisions made in the Buying Centre. This multi-personal decision-making leads to a high degree of formalization as well as a lengthy procurement or decision-making process. In addition, more rational and factual decision criteria are taken into account. Finally, a higher interaction between the buyer and the seller is necessary since the performance in B2B mostly efforts higher individuality (cf. Baumgarth 2010, p. 48; Burmann/Launspach 2010, p. 166f.; Masciadri/Zupancic 2013, p. 28-31).

The **market processes** in B2B are on a long-term basis rather than one-off transactions. They focus on long-lasting business relationships with personal communication and interaction (cf. Baumgarth 2010, p. 48-50; Burmann/Launspach 2010, p. 166).

In the B2B sector the **communication of the market performance** goes beyond those of B2C. In B2B communications, additionally relationship management as well as communication principles between firms are essential (Masciadri/Zupancic 2013, p. 28).

<u>Situative Specifics</u>

In the B2B sector 78% of the companies make use of the **umbrella brand** when promoting products or services. Since the corporate culture and the brand positioning are closely related to each other, difficulties arise at the internal anchoring of the brand. Especially when defining differentiating brand positioning concepts, problems occur because they need to be valid for a variety of services, sectors and countries (cf. Baumgarth 2010, p. 48-50).

In practice it is shown that many B2B companies are technically oriented. This causes a **lack of know-how for brand management** on the executive level. Thus, the attention and commitment of the top management for managing B2B brands is missing. Consequently, market as well as brand orientation are not prosecuted (cf. Baumgarth 2010, p. 48-50).

Because of the **low appreciation of B2B brand management** and the Marketing department in B2B organizations, low budgets are provided. Consequently, managers are not able to implement a brand positioning with integrated communication (cf. Baumgarth 2010, p. 48-50).

3.1.5 The Link between Brand Identity, Positioning and Image

Brand identity, positioning and image are closely related to each other as shown in the figure below.

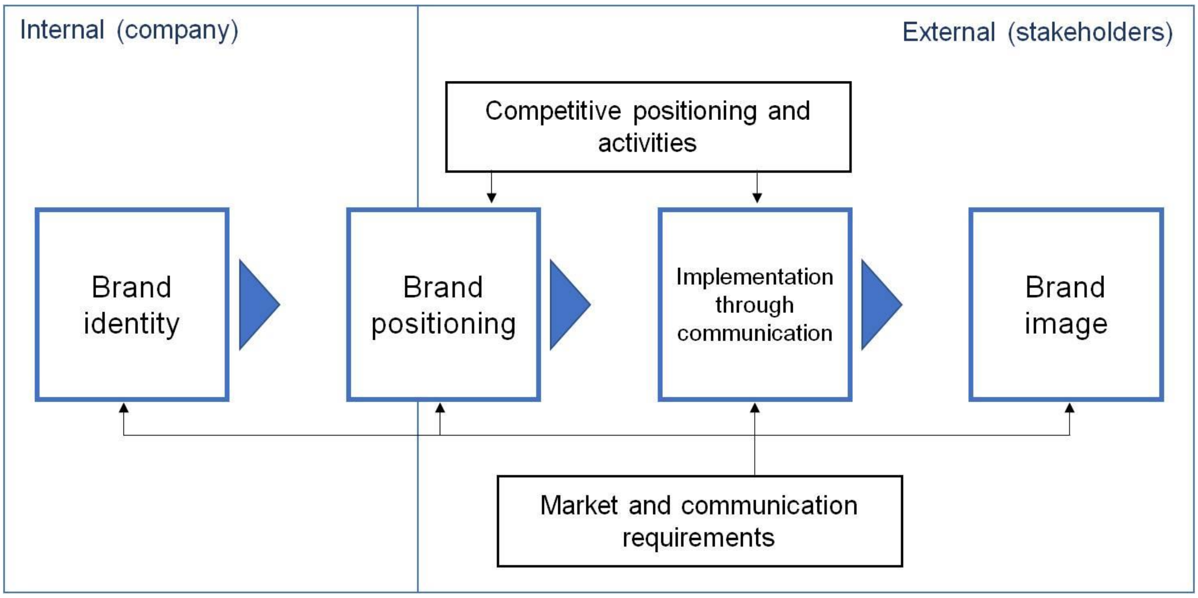


Figure 4: The interaction of brand identity, positioning and image (based on Esch 2014, p. 92)

On the one hand **brand identity** is a concept which expresses the essential characteristics of a brand. On the other hand it provides guidance on internal brand management (cf. Burmann/Launspach 2010, p. 159). Therefore, the identity is a self-image of a brand from the manager's view within a company. This self-image is based on the strategic orientation of the brand and describes how the brand should be presented to external parties (cf. Esch 2014, p. 79). A brand identity includes aspects such as:

- brand personality,
- values,
- vision,
- type of service,
- core competences, and
- brand origin (cf. Meffert/Burmann 2005, p. 65).

In order to define a clear brand identity, four main characteristics have to be considered:

- Reciprocity
- Continuity
- Consistency
- Individuality (cf. Burmann et al. 2015, p. 36)

Brand positioning is the way of transferring the brand identity to the stakeholders which is done in order to differentiate a company's brand from competition. Thus, the positioning has to be based on:

- the positioning of competitive brands,
- current and future needs of stakeholders, and
- the buying criteria of the target group (cf. Esch 2014, p. 91f.; Meffert/Burmann 2005, p. 65).

The brand identity is transferred through products, communication activities, personal contacts and other elements of the Marketing mix to the customers (cf. Esch 2014, p. 91f.). Via brand positioning companies try to take an advantageous position in the customer's mind in comparison to their rivals (cf. Meffert/Burmann 2005, p. 65).

In contrast to brand identity, the **brand image** is no management concept – it shows an impact on the market (cf. Burmann/Launspach 2010, p. 159). Therefore, the brand image is the public-image of a brand from the stakeholder's view (cf. Esch 2014, p. 79). The brand image is a multidimensional attitude construct which reflects the firmly established, condensed and valuable image of a brand in the target group's mind (cf. Burmann/Launspach 2010, p. 162).

To sum it up, the brand identity builds the source for the brand positioning. Through the brand positioning the identity should be brought over and communicated to the target group. For brand positioning and communication the competitive activities must be taken into account. Finally, the image shows if the brand identity was clearly transferred by positioning the brand on the market (cf. Esch 2014, p. 91).

In the pharmaceutical industry brands are likely to be managed internationally, rather than limited to one country. Thus, international branding motives, objectives and options need to be described.

3.2 International Brand Management

3.2.1 Motives and Objectives to Internationalize a Brand

In general there are many motives regarding internationalization of business activities. In practice, often a combination of different motives lead to internationalization (cf. Berndt/Altobelli/Sander 2010, p. 7f.). The major drivers can be categorized into:

- economic vs. non-economic,
- offensive vs. defensive, and
- resource-oriented, efficiency-oriented and strategically-motivated (cf. Berndt/Altobelli/Sander 2010, p. 7; Sternad/Höfferer/Haber 2013, p. 10).

The motives are shown in the table below.

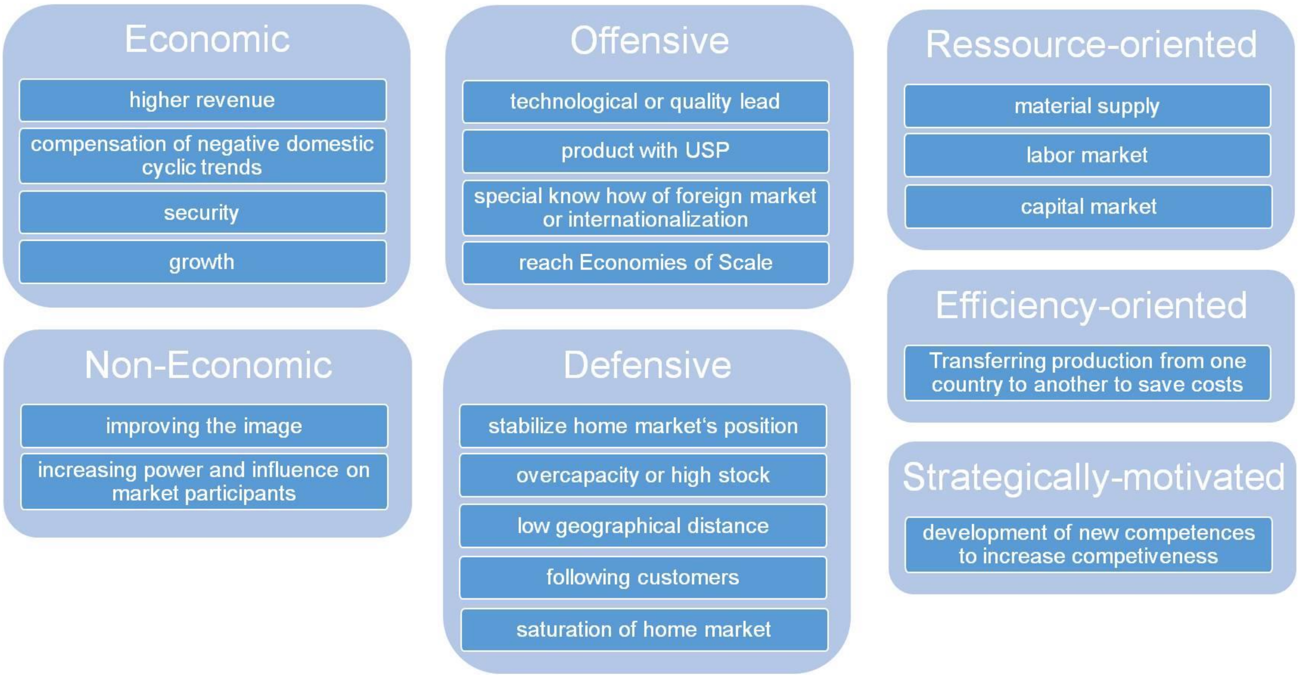


Table 3: Motives to internationalize (based on Berndt/Altobelli/Sander 2010, p. 7f.; Sternad/Höfferer/Haber 2013, p. 10f.)

Besides the motives, the objectives of going international are:

- extension of market position (growth, increase sales and profit),
- cost savings/reduction,
- risk diversification and security,
- procurement advantages, and
- image improvements (cf. Sternad/Höfferer/Haber 2013, p. 10f.).

One primary objective of going international is to extend the company's market position. This includes growth objectives as well as increasing sales and profit. Additionally, cost savings in the field of production and cost reduction through economies of scale are among internationalization aims. Operating in different countries involves risk diversification and increases the security of the organization. Lastly, international companies profit from procurement advantages and can improve their image (cf. Sternad/Höfferer/Haber 2013, p. 10f.).

If a company decides to internationalize its brand, different strategy options can be chosen - as described in the chapter 3.2.2 below.

3.2.2 International Branding Strategies

Brand expansion strategies are implemented for brands which show unexploited potential turnover and revenue. Brand expansion strategies are, on the one hand, helpful to enter new geographic areas with the brand or to add new products under the respective brand – which is called Brand Extension (cf. Burmann/Meffert/Blinda 2005, p. 192). For this thesis only the geographical brand expansion will be considered.

A geographic brand expansion strategy is about extending the sales territory of a brand into unprocessed markets. If a company notices a significant potential turnover and revenue in a foreign market, a geographic expansion supports in widening the brand's sales region. Three different strategies are available for a geographic expansion of a brand: multinational brand strategy, global brand strategy and international brand strategy (cf. Burmann/Meffert/Blinda 2005, p. 193).

<u>Multinational brand strategy</u>

Companies using a multinational brand strategy prepare for each foreign market a new and individual brand concept. The original home market brand concept is adapted to the country-specific customer needs. For a multinational brand strategy all elements of the brand identity, positioning and Marketing mix including communication, price and distribution are amended. In some cases this leads to a total new brand development (cf. Burmann/Meffert/Blinda 2005, p. 194; Geigenmüller 2003, p. 26). In short, a multinational brand strategy is about managing local brands in many different countries (cf. Berndt/Altobelli/Sander 2010, p. 244).

The advantages of this strategy are the generation of a higher turnover due to the brand adaption and more flexibility in the case of market developments (cf. Berndt/Altobelli/Sander 2010, p. 244f.). The multinational brand strategy is mainly used if a company acquires additional brands which have been successful and well positioned in certain foreign markets (cf. Burmann/Meffert/Blinda 2005, p. 194).
However, the insufficient usage of synergies in Marketing, higher complexity and potentially missing degression effects are negative consequences (cf. Burmann/Meffert/Blinda 2005, p. 194).

Global brand strategy

Within the frame of a global brand strategy, companies try to implement a uniform brand concept based on the original brand identity. Therefore, a brand is introduced to a market without any adaption or concern for national circumstances. Ideally a brand is set up globally with identical branding, positioning, communication, pricing and distribution policy (cf. Burmann/Meffert/Blinda 2005, p. 195). This leads to a standardization of strategic as well as operative brand management to the greatest possible extent (cf. Berndt/Altobelli/Sander 2010, p. 245).

According to Esch specific types of brands can make use of a global brand strategy:

- Brands fulfilling the same functional needs worldwide – mainly found in the B2B sector as well as technological products such as televisions or mobiles
- Brands appealing to a similar lifestyle or experience – e.g. fashion brands or designer furniture
- Luxury brands such as Rolex or Louis Vuitton
- Brands making use of the Country of Origin Effect – e.g. Volkswagen
- Service brands focusing on mobile customers including hotel chains or restaurants (cf. Esch 2014, p. 385f.)

A considerable advantage of a global brand strategy are cost savings due to the standardization of the brand identity. This way Economies of Scale can be exploited, for example, by standardized campaigns. Moreover, global brands are known worldwide and convey international expertise and confidence. Additionally, a unification of a brand leads to learning effects which help the company to get more efficient in brand management (cf. Burmann/Meffert/Blinda 2005, p. 195; Geigenmüller 2003, p. 26-30).

Disadvantages of a global brand strategy are the neglect of niches and country-specific customer contact and needs. Furthermore, problems with the brand in a country are quickly spread all over the world through media which negatively affects the reputation of the brand (cf. Burmann/Meffert/Blinda 2005, p. 195; Berndt/Altobelli/Sander 2010, p. 246).

International brand adaption strategy

The majority of companies pursue an international brand adaption strategy which is described as a mixed brand strategy. The purpose of this strategy is to reach the highest possible level of standardization of the brand's core benefit. All other elements of the brand presentation – for example communication activities – are adapted to local needs. This attempts to obtain cost and use benefits by standardizing the core brand identity characteristics. Under certain circumstances, it is possible to implement a uniform brand strategy for selected regions, for instance, in Europe (cf. Burmann/Meffert/Blinda 2005, p. 196; Berndt/Altobelli/Sander 2010, p. 246).

Selection of branding strategy

For choosing a branding strategy, several selection criteria have to be considered:

- company's strategic direction,
- the internationalization degree of the customers,
- customer's demand,
- competition's strategy,
- market structure,
- communication channels in the industry,
- cost reduction capabilities (synergy effects), and
- legal regulations in foreign countries (cf. Recklies 2001, p. 1f.).

For international branding strategies the Country of Origin can be an effective tool to strengthen a product's image through the country where it comes from.

3.2.3 Country of Origin Effect

The Country of Origin can be used within a branding strategy. If there is a Country-of-origin-Goodwill - which means that the country labeling 'Made in...' is connected to a positive image - the Country of Origin will gain additional acquisition potential (cf. Berndt/Altobelli/Sander 2010, p. 246). According to Thakor and Kohli the Country of Origin is described as: "The place, region or country to which the brand is perceived to belong by its customers" (Thakor/Kohli 1996, p. 27).

The Country of Origin Effect (COO) is the "differential consumer response to a product, due to the country that is perceived as its source" (Baack/Harris/Baack 2012, p. 166f.). Companies make use of the Country of Origin Effect by positioning a product in connection with the country of production. The customers hold a certain attitude to products or brands from different countries. Those perceptions can be an important aspect for the decision-making process or can be an influencing factor (cf. Kotler/Keller/Opresnik 2017, p. 299f.). The Country of Origin has an influence on:

- customer's brand evaluation,
- perception,
- preferences,
- choices of a particular brand, and
- purchasing behavior (cf. Cristea/Capatina/Stoenescu 2015, p. 423f.; Rasha 2015, p. 70).

The COO can have different effects on brand positioning:

1. **Positive effect:** The COO can deliver a competitive advantage and can create a favorable brand image. A country with a positive image positively affects the brand's perceived positioning by reducing the perceived risk and acting as a guarantee. On that way the COO can have an influence on the buying decision process of organizations (cf. Cristea/Capatina/Stoenescu 2015, p. 422f.). In addition, the perceived brand origin can have a positive impact on consumer perceptions of quality and familiarity with the product (cf. Thakor/Kohli 1996, p. 27).
2. **Negative effect:** The COO can also negatively influence the brand's positioning. This happens if the associations of a product category and country images are unsuccessful due to incongruent positions in the customer's minds (cf. Cristea/Capatina/Stoenescu 2015, p. 423). The image of a country strongly depends on country related economic, socio-cultural, political and technological factors. Customers tend to have a negative attitude of products manufactured in underdeveloped countries. In this case emphasizing the product's origin

could lead to product avoidance by the customer (cf. Chuin/Mohamad 2012, p. 14).

3. **Neutral effect:** The COO is not influencing the customer (Baack/Harris/Baack 2012, p. 167).

3.3 Specifics in Pharma Marketing and Branding

According to a study carried out in 2015 on the consumer buying behavior of medicine products, the brand name is after the efficacy of the drug the second most important purchasing criteria followed by pricing on the third place (cf. Gyaneshwari 2015, p. 135). Additionally, whenever a customer has to choose between a well-known branded medicine and an unknown one, he tends to buy the former. Therefore, branding in the pharmaceutical sector is a primary driver of customer's purchase decision (cf. Kumar/Naik 2006, p. 6).

To get a better understanding about branding in the pharmaceutical B2B sector, it is essential to get an overview of the pharmaceutical B2C branding - derived demand. Thus, in this chapter the pharmaceutical industry is clearly defined and the difference in pharmaceuticals and consumer goods branding is shown.

3.3.1 Delimitation and Definition of Pharmaceutical Industry

The importance of the pharmaceutical industry and its products increases due to the higher lifespan as well as the need for prevention of new diseases. While 100 years ago human's average life expectancy was at 40 years, the average life expectancy rose to 70 years by now. The reasons are improved hygienic conditions, higher quality of food as well as effective drugs as basic medical care (cf. Fischer/Breitenbach 2013, p. 9).

The pharmaceutical industry is divided into six different industry sectors:

- Research industry
- Biotechnology sector
- Generic industry
- Contract Research Organizations and Drug Delivery
- Medical technology industry
- Distributors of medicines (cf. Fischer/Breitenbach 2013, p. 28-41; Bergmann 2018, p. 1)

Companies operating in the pharmaceutical **research sector** focus on the development, production and marketing of new active ingredients including Over-The-Counter (CTO) medicine, nutrition, consumer health, animal health or specialty chemicals. The **biotechnology sector** uses biological systems for production, provision of services or environmental management in the pharmaceutical sector. Since 1970 **genetic engineering** has been in the center of interest. Producers of generic drugs sell medicines with the same active ingredient and dosage as the original drug. **Contract Research Organizations (CRO)** provide parts of drug manufacturing as a service on the base of a licensing business. On this way CRO's support other pharmaceutical manufacturers in developing new active substances which is called Drug Delivery. The **medical technology industry** deals with principles of engineering specialized in the area of medicine for instance prostheses, therapy and diagnostic device. **Medicine distributors** such as pharmaceuticals wholesaler and pharmacies are responsible for selling the drugs (cf. Fischer/Breitenbach 2013, p. 28-41; Bergmann 2018, p. 1). For this thesis the pharmaceuticals industry is defined as all drug manufacturers operating in the research and generic industry.

In addition, it is important to create a common understanding of how medical products are defined. According to the EU Directive 2001/83/EC of the European Parliament and Council a medical product is:

"(a) Any substance or combination of substances presented as having properties for treating or preventing disease in human beings; or

(b) Any substance or combination of substances which may be used in or administered to human beings either with a view to restoring, correcting or modifying physiological functions by exerting a pharmacological, immunological or metabolic action, or to making a medical diagnosis" (EU Directive 2001/83/EC 2001, p. 10).

3.3.2 Differences in Pharmaceuticals and Consumer Goods Branding

In the pharmaceutical industry brands represent a competitive advantage helping companies to maximize their Return On Investment (ROI) and inhibiting the growth of generics (cf. Schuiling/Moss 2003, p. 367).

So far branding has not been embraced by the pharmaceutical industry to the extent of the Fast Moving Consumer Goods (FMCG) sector. In reality, people working in the pharmaceutical industry have not realized that they are not just

managing products but managing brands. Indeed, pharmaceutical products deliver tangible – a certain efficacy – and intangible benefits such as trust, relief or happiness. Especially now, where product performance is getting similar, generics are entering the market and the competitive environment intensifies, pharmaceutical products need to be differentiated from competition (cf. Al-Hasan/Thomas/Gillet 2015, p. 36-38).
Many researchers investigated similarities in the structure of the FMCG and pharmaceutical industry, along with differences in branding. Branding in the FMCG industry is further advanced in its execution and ten years ahead that of the pharmaceutical industry (cf. Al-Hasan/Thomas/Gillet 2015, p. 37). Peter Wilson, Group Marketing Manager at Pfizer, stated: "We are focused on personalities for our brands and treating them like FMCG products, using a wide range of marketing techniques" (Al-Hasan/Thomas/Gillet 2015, p. 37). Furthermore, brands generate trust, which is an important aspect for medicine products which have an impact on human health. This indicates that if a medicine brand can convey confidence-building attributes, customer loyalty will occur similar to the FMCG industry (cf. Al-Hasan/Thomas/Gillet 2015, p. 36-38). But there is one key difference between FMCG and pharmaceutical branding. Pharmaceutical brands have a limited life time as they go off patent after 7 years from market entry. Thus, it is not worth investing a lot of money into building brands in comparison to the FMCG sector. This is also the reason why product brands in the pharmaceutical industry are strongly connected to the company brand (cf. Schuiling/Moss 2003, p. 372).

As the pharmaceutical industry differs from many other industries, the supplier management process as well as the buying process and buying centre shows some particularities.

3.4 Supplier Management & Buying Behavior in Pharma Facilities

3.4.1 Supplier Management Process in Pharmaceutical Organisations

Supplier Management in the pharmaceutical industry differs from other industry segments due to the high quality standards or rather high requirements for protecting the patient. The Supplier Management Process in pharmaceutical facilities consists of 4 steps, as shown in the graph below (cf. Bergmann 2018, p. 41f.).

Figure 5: Supplier management process in the pharmaceutical industry (cf. Bergmann 2018, p. 42; Appelfeller/Buchholz 2011, p. 73)

The first step **Supplier Selection** is about finding, choosing and qualifying new suppliers (cf. Bergmann 2018, p. 41). Basic information about potential suppliers are collected while analyzing the procurement market. But these information channels are not sufficient for a well-founded assessment of the supplier's performance (cf. Appelfeller/Buchholz 2011, p. 72). In addition, database analysis, purchasing consultants, web search, information from associations and supplier portals are ways to find new pharmaceutical suppliers. Supplier filtering and segmentation is done by country as well as by certificates. If a supplier comes into the short list, the companies are pre-qualified by a survey including detailed information about:

- the company,
- the product,
- the production process and materials,
- certificates, and
- cooperating distributers (cf. Bergmann 2018, p. 42-44).

In the early stages, written, standardized questionnaires are used for supplier surveys – also called supplier self-assessment. This basic assessment can be carried out at low cost and it takes little time (cf. Appelfeller/Buchholz 2011, p. 73). As a rule, the most important candidates are checked by a supplier and products audits on-site. If the result of the audit was satisfactory, the supplier is asked to provide samples of at least three different batches including analysis certificates. Afterwards, the samples are analysed and the result is compared with the provided analysis certificates. If the customer is satisfied with the results, offers and quality assurance agreements are developed. (cf. Bergmann 2018, p. 44).

For the **Supplier Assessment** the documentation of

- supplier qualifications and validation,
- negotiations and procurement,
- fulfillment of a contract, and
- notifications of defects is essential (cf. Bergmann 2018, p. 45).

In addition, the company needs to define how often suppliers are assessed, which Key Performance Indicators (KPI's) are looked at and who is authorized to sign the assessment. Supplier assessments can be executed with external parties as well as internally based on information of in-house purchase systems. External supplier assessments can be bought for each supplier separately at service providers such as Bisnode or Genios. Internal supplier assessments depend on in-house measured values derived from procurement systems (ERP) and accounting systems (SAP) (cf. Bergmann 2018, p. 45-47).

The information and result of the supplier assessment build the base for a successful **Supplier Development** (cf. Appelfeller/Buchholz 2011, p. 96). Supplier development is implemented if the performance is not satisfactory or if there are shortcomings – complaints or contract infringements – in the cooperation with the supplier. Supplier development actions are based on the controlling loop and developed in the case of actual/target deviations. Therefore, the controlling loop is the foundation of efficient purchasing management in the pharmaceutical industry (cf. Bergmann 2018, p. 49).

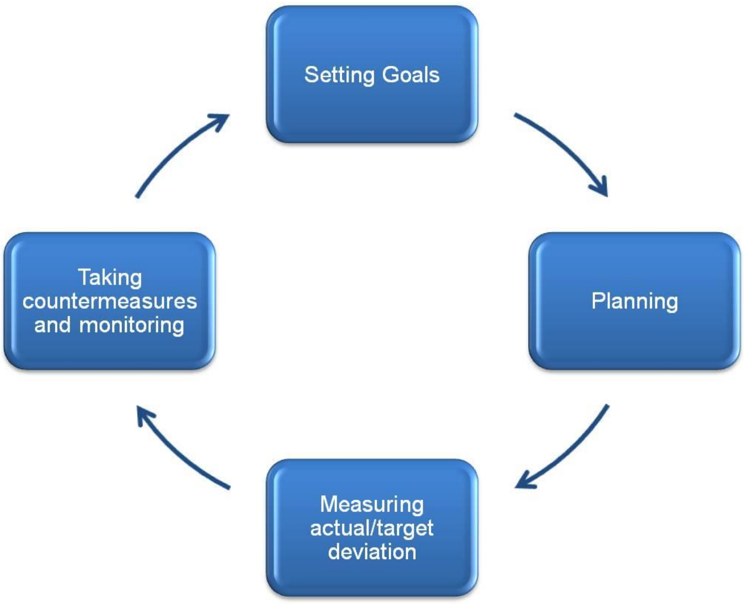


Figure 6: Procurement controlling – control loop (based on Bergmann 2018, p 49)

Firstly, the procurement targets and KPI's are specified in order to be able to measure the goals. Afterwards, a plan is set up how the goals can be reached. Subsequently the target/actual values are reviewed in predefined intervals, discussed and rated within a management meeting. If there is a deviation, action plans and correcting measures are set up. Those measures are equipped with clear defined goals, time frame for goal achievement as well as person in charge. By means of the annual result and the company goals for the upcoming year are developed – the process begins anew. On that way, pharmaceutical companies are able to evaluate, either keep and develop, or phasing out suppliers (cf. Bergmann 2018, p. 49).

The last step of the pharmaceutical supplier management process contains **Risk and Contract Management**. Procurement risks can be divided into:

- supply risk,
- risk of changing conditions, and
- compliance risk (cf. Bergmann 2018, p. 53).

Examples for possible risks in pharmaceutical procurement are frequently related to:

- product quality,
- adherence to delivery dates,
- default risk,
- price trend,
- dependence on suppliers,
- compliance with the legislation, and
- control of transactions (cf. Bergmann 2018, p. 53f.).

A common approach for risk management in the pharmaceutical industry is the risk portfolio (cf. Bergmann 2018, p. 53f.).

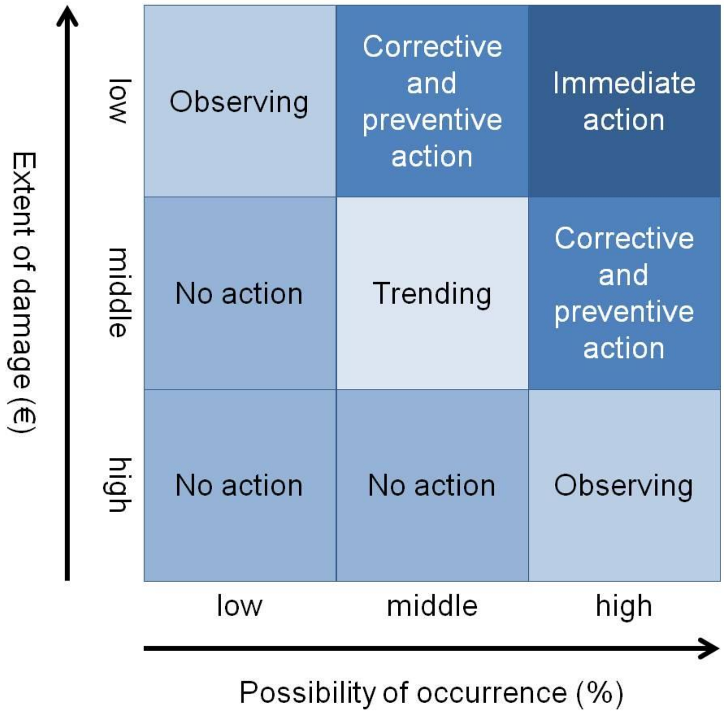


Figure 7: Risk portfolio for the pharmaceutical industry (Bergmann 2018, p. 55)

Thereby, risky events are valued in accordance with the parameters possibility of occurrence as a percentage and extent of damage in Euros. These two parameters build the axes of a matrix which are both divided into 3 sections: high, middle and low. Categories of the possibility of occurrence are once a month (high), once a year (middle) and once every 10 years (low). Categories of the extent of damage are defined as >10% of the annual turnover (high), 2.5-10% of the annual turnover (middle) and <2.5% of the annual turnover (low). Thereby, every event is evaluated with 1 to 3 for both units of measure and a matrix with 9 fields including different actions is the outcome (cf. Bergmann 2018, p. 54f.).
Before purchasing at a new supplier, contract details need to be negotiated. In the pharmaceutical industry orders can be made via purchase contracts or framework contracts (cf. Bergmann 2018, p. 59).

As brand positioning aims at influencing the target group, detailed knowledge about the buying processes and behavior within the buying centre is needed.

3.4.2 Industrial Buying Process in the Pharmaceutical Industry

Pharmaceutical companies set up their pharmaceuticals production plans annually. Therefore, suppliers have to have a detailed knowledge of the timing of the customer's purchasing cycle (cf. Berkowitz 2016, p. 183). In order to give an overview of structures, processes and content of organizational buying behavior, the Buygrid Model of Robinson, Faris and Wind is introduced.

In 1967 Robinson, Faris and Wind introduced 8 steps for managing and analyzing the industrial buying process. The steps are part of the Buygrid Model and describe 8 different buying phases within organizations (cf. Robinson/Faris/Wind 1967, p. 14):

1. Recognition of the organizational problem
2. Determination of the demand specification
3. Description of the product specification
4. Search for suppliers
5. Request and analysis of offers
6. Evaluation and selection of suppliers
7. Details of order information
8. Performance feedback and evaluation (cf. Robinson/Faris/Wind 1967, p. 14f.; Kotler/Keller/Opresnik 2017, p. 248-255)

The buying process starts with the recognition of an organizational problem which can be solved by buying products or services. The problem can be determined internally (e.g. employees) or externally (e.g. suppliers at shows). Consequently, the buyer defines the characteristics of the product as well as the amount needed. Afterwards, the buyer looks for potential suppliers and requests offers. The offers will be analyzed which leads to a narrow choice of suppliers. The buying centre defines the necessary features of the supplier on which the decision is based. After selecting the supplier, the buyer negotiates with the supplier and sets up the order details. The order includes the technical specifications, the amount, the date of delivery, the take-back guarantee as well as the warranty. Periodically, the buyer monitors the performance of the supplier and decides whether the relationship to the supplier is maintained, changed or quitted (cf. Kotler/Keller/Opresnik 2017, p. 248-255). Whether every step in the buying process is covered, depends on three different buying situations found in the pharmaceutical industry: Initial purchase, modified rebuy or straight rebuy (cf. Kotler/Keller/Opresnik 2017, p. 247; Berkowitz 2016, p. 184).

1. **Initial Purchase/New Task Buying:** For new purchasing situations the buyer seeks a huge amount of information to find out the alternatives to solve the organizational problem. The higher the costs or the perceived risk in a purchase situation, the higher the need for information. In addition for risky purchase decisions, the number of the participants in the buying centre increases (cf. Robinson/Faris/Wind 1967, p. 21; Berkowitz 2016, p. 184).
2. **Modified Rebuy:** Through a modified rebuy, a company wants to replace a product which is in use within a company. In this case, the buying centre requires fewer participants and strives for quicker decision making than for new tasks. Changes are made either to price or to product specifications (cf. Robinson/Faris/Wind 1967, p. 21; Berkowitz 2016, p. 184).
3. **Straight Rebuy:** A straight rebuy means to buy routinely a product and reorder it without any modifications. As long as the buyer is satisfied with the delivery, quality and price of the products, he or she will stay with the supplier. Straight rebuy situations rarely involve buying centre members and do not require negotiations. New suppliers are taken into consideration, if these conditions change (cf. Robinson/Faris/Wind 1967, p. 21; Berkowitz 2016, p. 184).

The 8 buying phases and the three different buying situations matched together form the Buygrid Model. In this model the buying process varies depending on the level of repetition of a buying situation (cf. Robinson/Faris/Wind 1967, p. 22f.).

Buying phases	**Buying situations**		
	New Task	**Modified Rebuy**	**Straight Rebuy**
1. recognition of the organizational problem	Yes	Possibly	No
2. determination of the demand specification	Yes	Possibly	No
3. description of the product specification	Yes	Yes	Yes
4. search for suppliers	Yes	Possibly	No
5. request and analysis of offers	Yes	Possibly	No
6. evaluation and selection of suppliers	Yes	Possibly	No
7. details of order information	Yes	Possibly	No
8. performance feedback and evaluation	Yes	Yes	Yes

Table 4: Buygrid Modell (based on Kotler/Keller/Opresnik 2017, p. 248)

In a totally new buying decision all 8 steps of the buying process are covered. In the case of a Modified Rebuy and a Straight Rebuy only the product specification as well as the performance evaluation of the supplier are carried out. For the Modified Rebuy the other six steps can be part of the buying process but can also be skipped. For the Straight Rebuy the other six steps are not part of the buying process (cf. Kotler/Keller/Opresnik 2017, p. 247f.).
In addition, the procurement process as well as the structure of the buying centre depend on product and situational characteristics. Especially the perceived risk has a strong influence on the buying process, buying centre as well as the procurement decision. For reducing the perceived risk, the buying centre members are intensively searching for information and lengthening the buying process. Furthermore, more people from different departments and hierarchical levels are involved in the buying centre (cf. Rolfes 2007, p. 21f.).

In the pharmaceutical medicine industry, the departments which are involved in a buying decision are:

- Management
- Purchasing Department
- Research & Development
- Quality Control
- Quality Assurance (cf. Berkowitz 2016, p. 183)

Since every decision within a company is made by humans, also the personal influence has to be taken into account for brand positioning. Thus, the Buying Centre model is described, which considers individuals within an organizational buying process.

3.4.3 Buying Centre in Pharmaceutical Organisations

Webster and Wind describe the unit responsible for B2B purchases within an organization as a 'Buying Centre'. It consists of a group of people within an organization, who are involved in a purchase decision process (cf. Webster/Wind 1972, p. 17). The Buying Centre is formed in order to deal with future procurement situations with the aim of finding the best suitable solution for a company (cf. Backhaus/Voeth 2014; p. 45). In most cases, the Buying Centre is an informal group within an organization which only consists for a specific purchase decision (cf. Rolfes 2007, p. 17).

People within the buying centre have different roles and core competences (cf. Backhaus/Voeth 2014; p. 45). It may occur that one person has several roles or more people take over one function (cf. Webster/Wind 1972, p. 17f.). In addition, some roles might not exist or are relevant in different phases during the buying process (cf. Kilian 2018).

According to Webster/Wind five different roles exists:

1. **Buyer:** This Buying Centre member is usually situated within the procurement department of a company and is responsible for selecting suppliers and entering into a contract,
2. **User:** After a purchase decision this person is working with the product or service,
3. **Influencer:** Influencer are members of the Buying Centre who are not actively involved in the decision making but directing the procurement process with informal influence,
4. **Gatekeeper:** This person manages the flow of information into and within the Buying Centre and thus influences the buying process indirectly, and
5. **Decider:** The task of this person or these persons is to finally take the decision to purchase. This role is often fulfilled by the executive board since it is a power position within the buying centre (cf. Webster/Wind 1972, p. 17; Haehnel 2011, p. 31; Kilian 2018).

Bonoma complemented the roles concept of Webster/Wind with an additional role:

6. **Initiator:** This person recognizes that an investment improves the current state and instigates consciously the procurement process (cf. Haehnel 2011, p. 32).

The purchase decision of Active Pharmaceutical Ingredients (API) and packaging materials requires direct involvement of the Top Management and purchase manager (cf. Venugopal/Krishnaraj 2015, p. 53). Therefore, in the pharmaceutical industry the main participants in the buying centre are the firm's medical director, financial officer and the procurement director (cf. Berkowitz 2016, p. 182).

In pharmaceutical companies the roles of the buying centre members are taken by the following persons:

- **Buyer:** In straight rebuy situations the buyers are purchasing agents who are not consulting within the buying centre. Otherwise, the buyers within pharmaceutical companies are the president of the medical group or the chief financial officer,

- **User:** The employee representative and machine operators are often included in the buying centre to provide the user perspective. They are judging the health plan regarding convenience and patient responsiveness,
- **Influencer:** The chief financial officer is the major influencer in pharmaceutical organizations. This person takes care of the financial details and of contracts that are signed. In addition, influencers are technical experts like R&D manager, production manager, quality control manager, quality assurance manager,
- **Gatekeeper:** The gatekeepers are often the secretary acting as a 'physician gatekeeper'. Moving beyond the gatekeeper is a challenge for the sales representatives to arrange an appointment or get access to a company,
- **Decider:** In the pharmaceutical industry this role varies, depending on the costs of the purchase or the risk to the organization. Often this function is taken by the director of purchasing. Furthermore, machine operators take the role of the Decider, and
- **Initiator:** The initiator can be an individual or group of individuals from different departments (cf. Berkowitz 2016, p. 182; Venugopal/Krishnaraj 2015, p. 52f.).

Brand positioning aims at influencing the perception and behavior of the target group. To achieve that, a detailed knowledge of buying processes and behavior is needed. In the end, all decision within a company are made by humans – individual as well as group decisions (cf. Bausback 2007, p. 14).

"In the final analysis, all organizational buying behaviour is individual behaviour" (Webster/Wind 1972, p. 88). The quotation makes clear that for B2B brand positioning individuals have to stay in focus. Not only the role, position and function within the buying centre is essential, but especially the impact intensity on decisions. The higher the formal and informal power position of the individual, the higher the personal influence on decisions will be. Therefore, the personal attitude of these individuals concerning product alternatives is important (cf. Bausback 2007, p. 13). The personal attitude of individuals is influenced by emotions, which can be transmitted through brands, pictures and storytelling (cf. Bermond 2016).

4 Brand Positioning in B2B context

Typically B2B customers perceive offers as a bundle of attributes, which are all associated with a certain level of benefit and risk. Thus, companies are developing brand positioning concepts in order to create additional benefits for the customers. Ideally, the supplier chooses a brand positioning, which creates an additional value to a relevant feature in order to facilitate the decision-making for the customer (cf. Burmann/Launspach 2010, p. 184f.).

4.1 Definition of Brand Positioning

According to Kotler brand positioning is defined as “Positioning is the act of designing the company’s offering and image so that they occupy a meaningful and distinct competitive position in the target customers’ minds” (Kotler 1997, p. 295).
According to Ries/Trout brand positioning means: “Positioning typically implies the mental image which a product or service projects in a target market in relation to the images of other products or services competing in that market” (Ries/Trout 1981, p. 5f.). "Positioning is what you do to the mind of the prospect. That is, you position the product in the mind of the prospect" (Ries/Trout 2001. p. 2).
Brand positioning is described by Esch as distinguishing the own brand from its competitors. Differentiating from competition means that a brand creates a unique and distinctive profile in the customer's subjective perception. The chosen positioning features need to comply with the wishes and needs of the target group and have to be relevant for them (cf. Esch 2001, p. 233).
This thesis is based on the definition from Ries/Trout, because for them brand positioning aims to distinguish the products or services in the target group’s mind from competition.

4.2 Brand Positioning Process

The positioning process consists of five sequential steps as shown in the figure below:

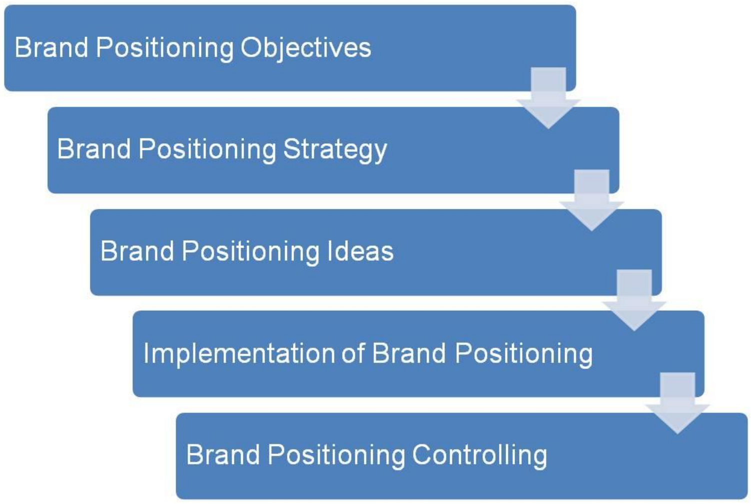


Figure 8: Five-step brand positioning process (based on Esch 2001, p. 233; Bausback 2007, p. 88)

At the beginning of a brand positioning concept, the objectives are defined. Positioning goals are the starting point of a brand positioning concept and build the basic thrust for the positioning strategy as well as implementation. After stating the objectives, the appropriate positioning strategy needs to be selected in coherence with the positioning objectives. Afterwards, positioning ideas are created and implemented through concrete actions – for example communication measures. The last step in the positioning process are controlling measures, which help the company to monitor the success of the brand positioning concept (cf. Esch 2001, p. 233-265; Bausback 2007, p. 88).

4.3 Information Base for Brand Positioning

Strategic brand management requests a huge information base about the company and the company environment in order to make decisions. Therefore, before starting to develop a brand positioning concept, extensive market research needs to be carried out, including the following analysis:

- Self-analysis
- Market analysis
- Customer analysis
- Competitor analysis
- Industry analysis (cf. Kotler/Pfoertsch 2006, p. 164; Großklaus 2015, p. 36)

By the customer analysis data about the customer's wishes and needs have to be collected. In addition, the driving forces for buying decisions as well as the buying criteria are relevant for the brand positioning concept. Regarding the competition, especially the positioning of rivals needs to be analyzed in order to be able to differentiate. Finally, the strengths, ability and characteristics of the own brand and company has to be identified and taken into account for the brand positioning concept (cf. Bausback 2007, p. 92; Sander/Rätsch 2003, p. 118).

4.4 Brand Positioning Objectives

The objective of brand positioning is, on the one hand, to achieve a dominant position in the customer's mind by anchoring the brand benefit. This means to transfer the brand values to the target group which meet the customer's ideal conception. On the other hand, the highest possible differentiation from competition is the aim of brand positioning. Via prominent performance features or psychological added value a Unique Selling Proposition (USP) in comparison to competition has to be reached at the target group (cf. Burmann/Launspach 2010, p. 171; Bausback 2007, p. 89).

Positioning objectives are further divided into pre-economic and economic. Pre-economic goals – also called behavioral or psychological goals – of brand positioning refer to the target group. For instance activation, a high level of awareness, positive attitude and image, perceived uniqueness and differentiation or a profitable unique position in comparison to the competition belong to pre-economic goals. Economic objectives of brand positioning affect the company and include, for example, a high sales volume, high prices, high market share as well as high margins, revenue and profit (cf. Bausback 2007, p. 89f.).

There are two different ways of how brands can be positioned in the customer’s mind – either reactive or active.

4.5 Reactive and Active Positioning Models

Positioning models demonstrate the positions of brands from the target group's point of view (cf. Esch 2014, p. 126). They represent the subjective perceived position of the own brand in relation to the competitive brands. This comparison takes two or more positioning characteristics into account, which are relevant for the target group. Therefore, positioning models illustrate the memory structure of customers regarding a brand in a product area (cf. Esch 2001, p. 236).

Reactive Positioning Models

The reactive positioning model is a classical positioning model which is based on current, articulated customer's needs. In the model it is assumed that the customers buy products, services or brands whose characteristics best meet their current needs (cf. Burmann et al. 2015, p. 114).

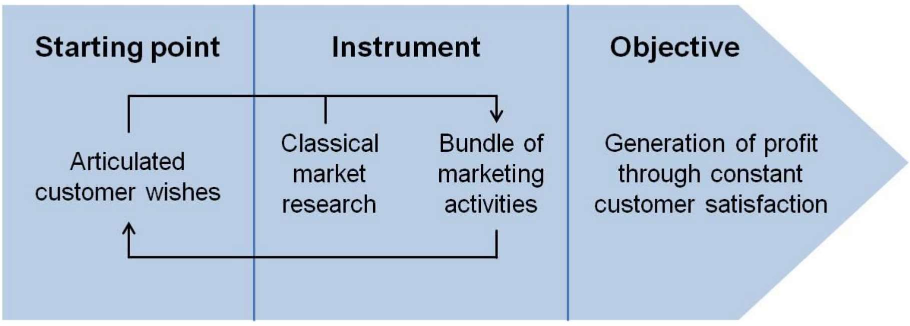


Figure 9: Reactive Positioning Model (based on Haedrich/Tomczak/Kaetzke 2003, p. 53)

As shown in the figure above, a reactive positioning model starts with an articulated customer wish. Through a classical market research this articulated need can be detected, and build the base for the marketing activities. The perceptual map is a reactive positioning model which is described in chapter 4.7.2.

Active Positioning Model

In many markets it is not sufficient to focus on customer's existing needs and wishes. Consequently, it is necessary to identify and adjust the marketing activities to latent customer needs.

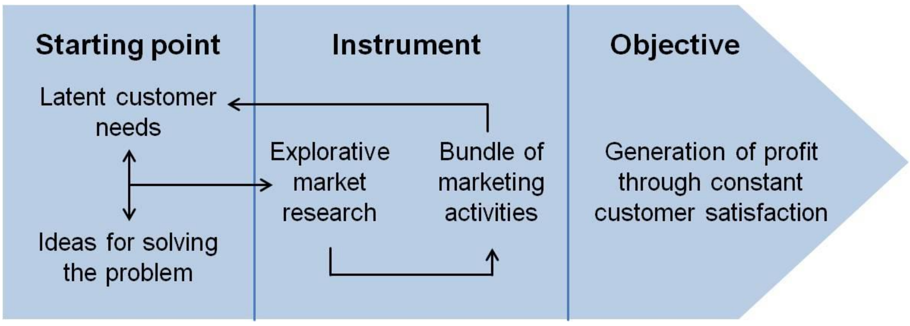


Figure 10: Active Positioning Model (based on Haedrich/Tomczak/Kaetzke 2003, p. 53)

The active positioning models start with a latent customer need and ideas how the problem can be solved. This latent customer need has to be detected through explorative market research and directly influences the marketing activities.

Active positioning is about finding out an attribute which is unknown to the customer but relevant for the customer's buying decision. Based on that attribute, the brand positioning is established (cf. Haedrich/Tomczak/Kaetzke 2003, p. 53; Burmann et al. 2015, p. 114). According to Ries/Trout it is preferable to select a strategy that defines a new market because only then a real competitive advantage can be created (cf. Ries/Trout 1986, p. 80). A differentiation of the two types of positioning models is necessary for the further positioning process. However, it is crucial to find a balance between reactive and active positioning (cf. Burmann et al. 2015, p. 114).

After defining the positioning objectives, companies have to choose a positioning strategy.

4.6 Brand Positioning Strategies

4.6.1 Positioning Strategy by Esch

According to Esch the selection of a positioning strategy is based on the positioning objectives as well as the actual position and target position of a brand. Therefore, the goal of the positioning strategies is to reduce the perceived distance between the customer's ideal image and the own brand. To close this gap, Esch suggests the following strategies – shown in the graph below (cf. Esch 2014, 137f.).

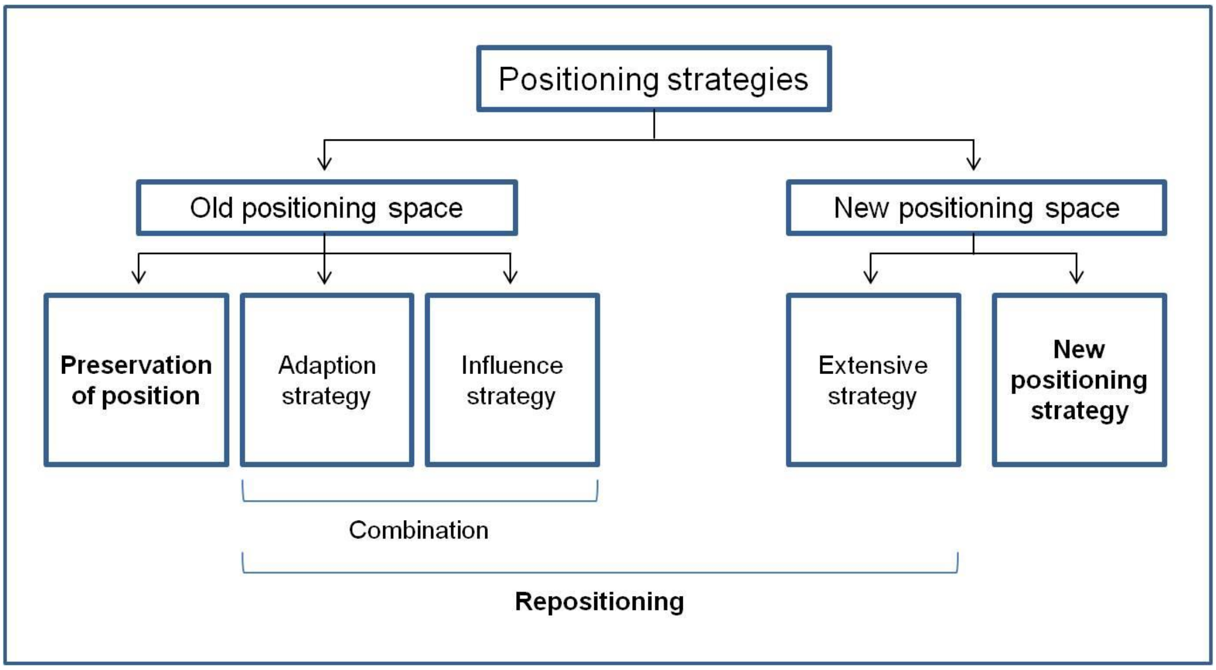


Figure 11: Positioning stratgies by Esch (based on Esch 2014, p. 139)

As shown in the figure above, Esch defined three fundamental positioning strategies:

1. Preservation of the brand positioning
2. Repositioning of the brand
3. New positioning of the brand (cf. Esch 2001, p. 247)

It is suggested to **keep the brand positioning** if the actual brand positioning complies with the ideal image of the target group and is not used by another brand. The marketing measures should be adjusted with time and environmental changes without changing the brand identity and image (cf. Esch 2014, p. 139).

The **repositioning of a brand** is useful if the actual brand positioning is too far from the ideal of the customer. In the 'old positioning space' it can be selected between the adoption as well as influence strategy. For these two strategies the core target group as well as the positioning features stay the same. The difference is that the adoption strategy aims to adapt the actual position to reach the ideal position. In comparison the influence strategy tries to change the ideal of the customers. In the 'new positioning space' an additional repositioning strategy is defined – the extensive strategy. For this purpose parts of the old positioning stays the same, being complemented by additional characteristics (cf. Esch 2014, p. 139f.).

The **new positioning of a brand** is recommended if the core characteristics are not associated with the brand. This indicates that the actual positioning of the brand is far off the ideal of the target group. Consequently, the brand should be positioned in a new positioning area by selecting new positioning characteristics as well as target customers (cf. Esch 2014, p. 140).

4.6.2 Competitive Positioning Strategies

Competitive positioning strategies have been developed by Ries/Trout - Marketing Warfare - and Kotler. In this chapter, both strategy approaches are combined as they are very similar.

Competitive positioning strategies point out different ways to position a product or service, a brand or a company (cf. Ries/Trout 1997, p. 5). Not all companies have the same position in the market. The positions of firms depend on the market share they occupy (cf. Bangladesh Open University 2017, p. 239). Thus, at the beginning a company has to objectively find out its position in the market in comparison to its competitors. Additionally, the company has to analyze and understand the customer and the ongoing 'war' on the market (cf. Ries/Trout 1997, p. 5-8).

Kotler defined 4 positioning strategies including the market leader, market challengers, market followers and market nichers (cf. Kotler/Armstrong 2014, p. 531).

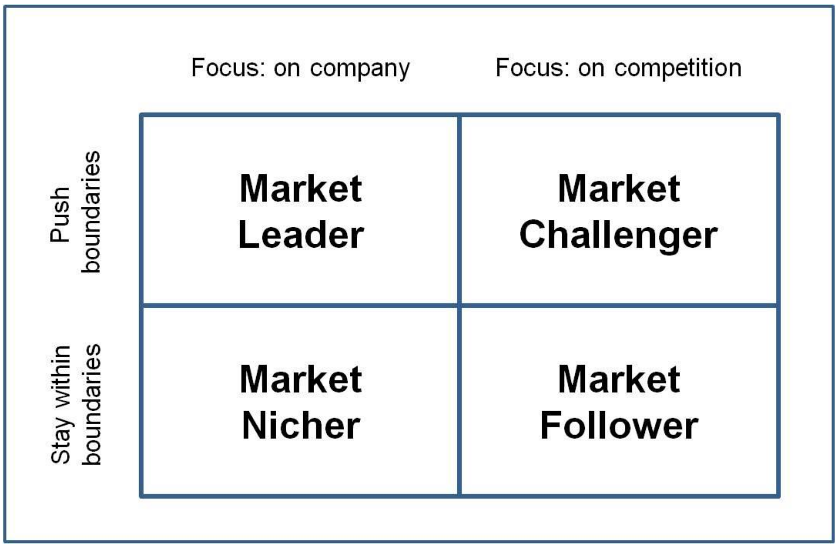


Figure 12: Competitive Positioning Strategies by Kotler (based on Kotler/Armstrong 2014, p. 531)

Ries and Trout defined 4 strategies including:

- defensive strategy,
- offensive strategy,
- flanking strategy, and
- guerrilla strategy (cf. Ries/Trout 1997, p. 6).

Now the two competitive positioning strategies are combined and each of the 4 strategy approaches is explained.

<u>The Defensive strategy for the market leader</u>

According to Ries and Trout market leaders should implement a defensive strategy (cf. Ries/Trout 1997, p. 55). The market leaders occupy the largest share of the market. The market leader has a solid position in the customer's mind for a certain product category and put high effort and resources in defending its market position (cf. Ries 2001, p. 19). This does not mean that they have been first to the market. They are pioneer brands, which can be surpassed by other brands taking over the leader position (cf. Gunelius 2017). Therefore, the market leader should follow a defense strategy that protects it from its competitors (cf. Bangladesh Open

University 2017, p. 241). The Defensive strategy in the Marketing Warfare concept include three basic principles:

1. The Defensive strategy should only be selected by the market leader,
2. The best way to make use of the Defensive strategy is to attach yourself by introducing new products or services which are superior in comparison to the existing ones, and
3. Strong moves of the competition needs to be blocked before competitor gets established (cf. Ries/Trout 1997, p. 55-66).

These three principles are easy to learn but difficult to put into practice. Being the leader means that customers perceive the company as the leader. Therefore, customers create and define the 'true' category leader (cf. Ries/Trout 1997, p. 55).

The Offensive strategy for the market challengers

This approach is recommended for companies which keep the second or possibly third position in the market (cf. Ries/Trout 1997, p. 68). The aim of the market challenger is to reach for the leader's position and try to increase its market share through offensive strategies (cf. Bangladesh Open University 2017, p. 249). The market challengers are looking for differentiators which can be transferred to the target group through marketing programs (cf. Gunelius 2017). Ries and Trout defined three principles for the offensive strategy:

1. As a challenger on the second or third position it is recommended to focus on the competitor's strengths, rather than focusing on the own strengths and weaknesses,
2. The weaknesses of the leader's strengths have to be identified, not the weakness in the leader's position, and
3. The weakness of the leader's strength should be attacked by the challenger as narrow a front as possible. The aim is to find a mental spot through which the challenger can attack the leader in the prospect's mind. The challenger should concentrate on this single spot and attack it. (cf. Ries/Trout 1997, p. 67-81).

The offensive strategy is about taking the market share from the rivals in order to improve the company's competitive positioning (cf. Bangladesh Open University 2017, p. 241, 249). Their intention is to weaken the leader, which is hardly possible if the leader occupies the first position in the customer's mind (cf. Ries/Trout 1997, p. 70).

The Flanking strategy for the market follower

The Flanking strategy is an indirect approach to attack the competitor (cf. Ries/Trout 1997, p. 83). The market follower is not looking for branding differentiators like the challenger. The market follower imitates the market leader's strategy (cf. Kotler/Armstrong 2014, p. 531-532). Thereby, the follower has to identify a weakness in the competitor's positioning. It is recommended to start operating in a niche, in which the rival has a weak positioning. Later on, the mass market can be entered (cf. Ries/Trout 1997, p. 83-99). Ries and Trout highlighted three principles for a Flanking strategy:

1. For the brand a new category should be created to position the brand as a first in a segment. The Flanking approach works best in an uncontested field where there is no direct competition with the market leader,
2. Flanking attacks are about surprising the rivals. Based on that, the market leader faces troubles in using its resources for counterattacking the action before it gathers momentum, and
3. After finding or creating a new category, the company should focus on this area and continue consolidating the established position (cf. Ries/Trout 1997, p. 83-99).

To be able to surprise customers through the Flanking strategy, no information about the flanking action should be provided beforehand. As a result, the time-to-market period has to be shortened without testing. In addition, for Flanking strategies it is important to be first in the prospect's mind. In this case, the company does not necessarily need the better product, but a better brand. This is achieved by differentiating the brand from competition to be first in the customer's mind (cf. Ries/Trout 1986, p. 90f.; Ries/Ries 2009b, p. 10-13).

The Guerrilla strategy for the nicher

The Guerrilla strategy can be applied by companies acting in a niche. To make use of guerrilla techniques, the products and also the positioning has to differ considerably from the leader (cf. Ries/Trout 1997, p. 101-116). A market nicher aims to dominate a little part of the overall market. This makes them focusing on their own strengths, weaknesses and position. Market nichers are typically smaller companies that cannot compete with the market leader (cf. Kotler/Armstrong 2014, p. 531-533).

Ries and Trout identified the following three principles for a Guerrilla strategy:

1. For the guerrilla tactic select a segment or niche which is small enough to defend it with the available resources,
2. The company should stick to its lean route and not act like the leader. Adjusting the techniques to the competitor can be destructive, even if the guerrilla actions are successful, and
3. Niche players profit from their ability to quickly react to environmental changes. If the market is declining, small companies have the possibility to exit the market without big losses (cf. Ries/Trout 1997, p. 101-116).

To get a clear picture of the four competitive positioning strategies, it can be summarized that the market leader makes use of the Defensive strategy. The Offensive strategy is chosen by the second or the third in the market. This company tries to find a weakness in the market leader's strengths and attacks it. The Flanking strategy intends to identify a weakness in the competitor's positioning and indirectly attacks the competitor through its weakness in a niche. Later, the Flanking strategy can be rolled out for the mass market. Guerrilla strategies are applied by companies which are operating in a niche and have better products than the competitors. These companies stay within their niche, not willing to enter the mass market.

4.6.3 Selection of Positioning Strategy

For this thesis three different positioning strategies have been introduced:

- Positioning Strategies by Esch
- Competitive Positioning Strategies by Ries/Trout and Kotler

The positioning strategies by Esch aim to reduce the perceived distance between the customer's ideal image and the own brand. The competitive positioning strategies consist of four different strategy options including defensive and offensive strategies as well as niche strategies.

For this thesis the competitive positioning strategies of Kotler and Ries/Trout will be considered further as the strategy approaches clearly define the actions which have to be taken under certain circumstances. Based on the market research results, the final decision on the strategies can be made.

For the competitive positioning strategies the relative power on the market is the most important indicator to choose a strategy. The strategy selection is based on the market share of a company related to competitor's shares. The different market shares provide each company various initial situations and roles in the market (cf. Ries/Trout 1986, p. 24-26). Therefore, to be able to decide which competitive positioning strategy is the best choice for this work, depends on the perceived position of Stölzle Glass Group in the target group's mind. For this thesis, the offensive, flanking and guerilla strategy is taken into consideration.

Based on the positioning objective and strategy, positioning ideas have to be developed.

4.7 Brand Positioning Ideas

The success or failure of a positioning strategy strongly depends on the positioning content. Thus, the selection of positioning ideas is the core element of the positioning process (cf. Bausback 2007, p. 92). The positioning idea is about finding and formulating an idea which positions the company's brand, product or service on the market (cf. Ries/Trout 2001, p. 201-206).
Positioning ideas can be developed in consideration of the three following areas:

- Target Customer: Needs, requirements, purchasing criteria and lifestyle
- Competitors: Positioning content
- Company's own brand: Strengths and abilities (cf. Esch 2001, p. 250; Bausback 2007, p. 92)

Positioning ideas are mainly based on the company's own strengths and weaknesses. In addition, also strengths and weaknesses from rivals can be used to set up positioning ideas (cf. Ries/Trout 2001, p. 205-208).
Firstly, the requirements for developing positioning ideas are described, followed by positioning models. In this thesis two positioning models are introduced: the Perceptual map and the Differentiate or Die approach.

4.7.1 Profile Requirements

A positioning idea has to fulfil certain requirements in order to be successful. Positioning ideas help companies to be successful and profitable in a competitive environment. Companies have to present the potential customers an idea, why its brand is preferable in comparison to competitor's brands. Consequently, the most important question is: Which idea is used to position the brand in the customer's mind? (cf. Brandtner 2002, p. 1).

Requirements for brand positioning are:

- to differentiate from rivals,
- to address the target customer,
- to achieve a high concordance between company and customer perception,
- to make use of the positioning concept long-term,
- to achieve differentiation to other brands within the company, and
- to quickly generate ROI (cf. Duncker/Röseler/Fichtl 2015, p. 76).

According to Brandtner there are seven key characteristics which have to be fulfilled for successful brand positioning:

- **Differentiation from competition:** The competitive positioning has to be known and accepted. On that base, a company can develop its own brand positioning,
- **Superior perceived quality:** The brand which is perceived as being the best and most customer friendly succeeds on the market. It is crucial to develop an idea which spontaneously creates quality in the target group's mind,
- **Simplicity:** The brand should be positioned as a first choice in the customer's mind. Ideally, this is achieved by reducing the positioning idea to the essence – to one single word,
- **Potential for repositioning competition:** Neutralizing competitor's positioning and promotional activities is key before the own positioning is established,
- **Willingness to make sacrifices:** Brand extension is recommended if it strengthens the brand positioning. In many cases, brand extension weakens or destroys the brand positioning,
- **Durability:** Brand positioning ideas need to be communicated again and again, until the ideas are understood and accepted by the customers, and
- **Future orientation:** Companies have to give their customers an idea why they should stick to their brand. This idea defines today, how successful the positioning will be tomorrow. (cf. Brandtner 2002, p. 1-8).

In addition, Großklaus defined key requirements for successful brand positioning:

- **Image:** The positioning has to be in coherence with the company as well as brand image. Otherwise, the customers perceive the brand as incompetent and unreliable, and

- **Product benefit:** The more a brand targets customer's emotions, the more a customer is willing to purchase the product and the item gets valuable for him or her (cf. Großklaus 2015, p. 13).

According to Ries/Trout, the worst mistake is to develop a branding that appeals to everyone. The market is overloaded with brands that have claimed positions. Therefore, a product which seeks to appeal to everyone will be disregarded by everyone (cf. Ries/Trout 2001, p. 58-60).

4.7.2 Perceptual Map as a Reactive Positioning Model

The basic idea of brand positioning is often demonstrated in two- or more-dimensional positioning models (cf. Esch 2001, p. 236). The multidimensional scaling includes methods, which show positions of brands regarding their similarities and dissimilarities. For positioning analysis perceptual maps are chosen in order to illustrate the subjective customer's perception of brands. The closer two brands are positioned in the positioning area, the more similar is the perception of these brands (cf. Backhaus et al. 2016, p. 661). These models consist of the most relevant attributes for product or brand selection from the customer point of view in a defined market (cf. Haedrich/Tomczak/Kaetzke 2003, p. 47-52).

According to Großklaus the following information is included in a positioning model:

- the perceived positioning from the customer's point of view,
- the level of differentiation from competitive brands,
- the expectations of customers, and
- the gap between the actual positioning of a brand and customers' expectations (cf. Großklaus 2015, p. 22f.).

Procedure

At the beginning, the relevant attributes for the axes are fixed and the competitors have to be analysed. In the resulting positioning area the own brand and the competitive brands are placed. In addition, the 'real' positioning from the company's point of view and the customer's perceived positioning are marked in the positioning area. This contrast demonstrates gaps and indicates need for action (cf. Großklaus 2015, p. 22f.).

The graph below shows a two-dimensional perceptual map.

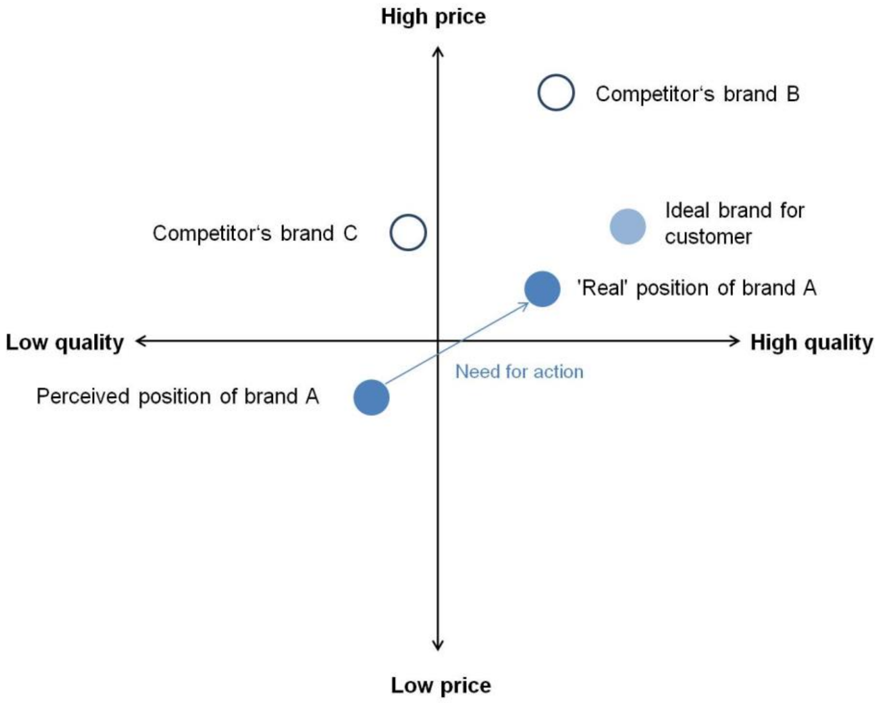


Figure 13: Perceptual map:two-dimensional positioning model (based on Burmann et al. 2015, p. 119)

In the graph, not only the company's positioning is included, but also the positioning of the competitors. Therefore, the company is able to identify segments which have not been occupied yet. Additionally, the own perspective of the positioning can be compared with the external perception and need for action can be identified (cf. Haedrich/Tomczak/Kaetzke 2003, p. 47-52; Großklaus 2015, p. 22f.).

4.7.3 Differentiation Model by Trout

The positioning model 'Differentiate or Die' by Trout is about finding a positioning idea which makes a company standing out from the crowd. The objective is to find a positioning idea which differentiates a company's brand, product or service from its competitors. In the opinion of Trout, differentiation is created through mental associations in the customer's mind which have to be communicated in order to get into the mind of the prospects (cf. Trout/Rivkin 2008, p. 22-24).

Trout developed 14 basic ideas which are categorized into their suitability to achieve differentiation. The three categories are 'Weak, never', 'Weak, possible' and 'Strong'.

Category 'Weak, never'

- *Creativity:* In fact, creativity is no real differentiation idea since many advertisements are very creative. Therefore, it is hard to find potential to differentiate through creativity (cf. Trout/Rivkin 2008, p. 35).

Category 'Weak, possible'

- *Quality:* Quality is a factor which is required from the customers and thus no real differentiating idea. The customers expect a certain level of quality in relation to the competitors' products,
- *Customer orientation:* Customer orientation only provides a short-term advantage for a company. In the long run, customer orientation is too easy for rivals to be copied and imitated,
- *Price:* A high price level is also a way to differentiate from competition. But high prices only work if the organization does something differently and provides an extra value. In addition, competition can change their price level easily,
- *Variety:* Giving the customers a huge choice is an opportunity to create differentiation. But competition can offer a huge variety as well, and
- *Being First:* Usually, a new brand needs a long time until it is anchored in the prospect's mind. But being first does not involve invincibility. Continuity in brand positioning is key to profit from the first-mover advantage (cf. Trout/Rivkin 2008, p. 35-102).

Category 'Strong'

- *Attribute Ownership:* Companies use attributes to get unique and known and to achieve differentiation. Especially, the attributes simplicity and benefit orientation are highly valuable to occupy,
- *Leadership:* Market leadership is a very effective differentiation opportunity as it delivers the prove of a brand. Customers connect to a market leader positive associations such as power, success and status,
- *Heritage:* Tradition can play an important role when differentiating a brand from competition. Tradition implies a long history and security and can be derived from many indicators like the number of years the company is doing business,

- *Market Specialist:* The specialist acting in an outstanding field is perceived as being more an expert than the generalist. Consequently, the specialist differentiates itself through its expertise in a certain area,
- *Preference:* Being the first choice for the customers in a certain segment, is one way to differentiate from competition. A precondition is to have an competitive advantage in the segment to become the first choice,
- *How the Product is Made:* Technology can act as a memorable differentiation factor. To achieve this, the new technology has to take centre stage of all marketing activities,
- *Being the Latest:* Customers expect that the 'next generation products' are superior than the current ones. From this point of view, next generation products are a strong differentiation factor, and
- *Hotness:* Hotness is a differentiation factor in a certain area if the position has not been reserved so far (cf. Trout/Rivkin 2008, p. 103-180).

Brandtner added with the Lead Product an additional positioning idea:

- *Lead Product:* A lead product is an innovation or flagship product, which is used to position and differentiate a brand on the market. The purpose of a lead product is to use one product to improve the image of the brand. Therefore, a lead product strategy should be considered for repositioning a brand, as the halo-effect transfers the positive image of the lead product to the brand (cf. Brandtner 2017a; Brandtner 2017b).

In addition, Ries/Ries stated that being the first does not automatically mean that the brand will become the leader in a new category. If a company or brand is first in a category, the brand only starts off as the leader. The reason is that no other brand tries to occupy this position in the same branch (cf. Ries/Ries 2004, p. 161f.). Essential is being the first in the mind of the prospects – called 'first-to-mind advantage'. Since brands have no physical reality, they only occur in the mind of the target group. Therefore, being first in the marketplace is an opportunity to become 'the first in the mind' (cf. Ries/Ries 2004, p. 161-165; Brandtner 2005, p. 6). If a brand has a 'first-to-mind advantage', all competitive brands are repositioned as a weak imitation (cf. Brandtner 2005, p. 6).

Halo-Effect

The halo-effect is a term originating from psychology. “Halo effect refer to the widespread human tendency in impression formation to assume that once a person possesses some positive or negative characteristic, other as yet unknown qualities will also be positive or negative, in other words, consistent with the existing impression” (Forgas, Joseph Paul 1985).

In the field of branding, the halo-effect appears during repositioning a brand. If a brand is perceived for one attribute as very positive, the brand will be perceived very positive in general (cf. Brandtner 2017).

Procedure for developing a differentiation idea

There are three steps for developing a differentiation idea. Firstly, it is requested to analyze the current perception in the customer's mind. This helps the company to figure out the perceptual strengths and weaknesses of the own company and of the competitors. After that, a differentiation idea has to be identified. In order to make the customers believing the company's positioning argument, some kind of proof has to be given. Finally, the difference has to be spread through communication activities (cf. Trout/Rivkin 2008, p. 75-79).

4.7.4 Evaluation and Selection of Positioning Idea

After creating some positioning ideas, the best alternative has to be filtered and implemented. For making a selection the requirements for a successful positioning idea have to be considered. These requirements are explained in the chapter 'Profile Requirements' above.

In addition, Großklaus defined selection criteria which should be considered when choosing a positioning idea:

- Occupancy rate of aspired positioning area
- Budget for implementation
- Probability of visible, verbal and audible implementation
- Market and trend analysis
- Profitability of positioning idea (break-even-point)
- Potential for substituting or imitation
- Collusion points with positioning of other business areas or company image
- Continuity of positioning
- Occupation of emotional fields
- Rational benefit (cf. Großklaus 2015, p. 140)

In order to select the best positioning alternative, it is recommended to evaluate the ideas in a matrix – benefit analysis. Vertically the selection criteria are listed and horizontally the prepared positioning ideas (cf. Großklaus 2015, p. 140). The criteria are selected regarding their relevance for making a decision and solving the problem. A set of 10 to 20 criteria is recommended for a benefit analysis (cf. Kühnapfel 2014, p. 7f.).

After evaluating the positioning ideas, the two favourite alternatives have to be presented to the executive management (cf. Großklaus 2015, p. 141). In order to make a final decision the following criteria have to be considered:

- the two best positioning ideas as a recommendation,
- the reason for this recommendation,
- possible opportunities and threats,
- planned budget for each positioning idea and justification,
- positioning model showing positioning area and competition,
- next steps and timing, and
- approval of executive management (cf. Großklaus 2015, p. 141f.).

4.8 Implementation of Brand Positioning

The operative brand management activities translate the strategic specifications of the brand positioning into actions. These operative measures include:

- internal brand management,
- external brand management, and
- interactive brand management (cf. Burmann/Launspach 2010, p. 172; Kotler/Pfoertsch 2006, p. 107f.).

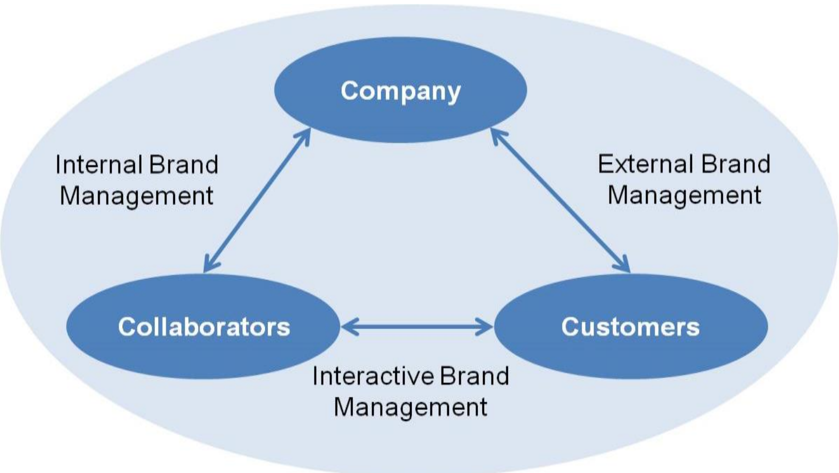


Figure 14: Brand Management Triangle (based on Kotler/Pfoertsch 2006, p. 108)

Internal brand management includes all actions to train and motivate employees to become brand ambassadors. External brand management relates to adopt the Marketing mix to the brand characteristics. Interactive brand management focuses on strengthening the brand image at the customers through the employees (cf. Burmann/Launspach 2010, p. 172; Kotler/Pfoertsch 2006, p. 107f.).
In the implementation phase, the selected positioning strategy and idea are turned into actions in order to reach the marketing objective. The strategy as well as the implementation are important factors for creating competitive advantages (cf. Kotler/Armstrong 2014, p. 54f.).

In this thesis only the communication as an external brand management activity is considered. These measures are based on the brand positioning and conveyed to the customers by integrated communication.

5 Implementation through Integrated Communication

The task of external operative brand management is to transfer the brand positioning to the four classical instruments of the Marketing mix – product, price, place and promotion. In addition, it is crucial to coordinated the four P's regarding content, timing and formality (cf. Burmann et al. 2015, p. 201f.).

For this thesis an integrated communication guideline is developed to implement the brand positioning.

5.1 Definition and Specifics of B2B Communication

B2B communications include all activities which are applied by companies in order to promote and communicate their products and services to other organizations. The target group are people or a group of people (buying centre) which are taking or influencing purchasing decisions. B2B communications within the Marketing mix create brands and make companies stand out from the crowd (cf. Masciadri/Zupancic 2013, p. 4). The main objective of B2B communication is to change the attitudes and opinions of the buying centre members. This is achieved by a mixture of personal and impersonal communication instruments. It is important to target members of the buying centre who have significant influence on the final purchase decision (cf. Chlebišová/Kyzeková/Zajarošová 2011, p. 1231).

In the past years the requirements for B2B communications have increased. The driving forces are:

- Changing customer behavior
- Homogeneity of products, services and communication
- Fragmentation of communication channels and mediums
- Overstimulation through mass marketing
- Management of Multi-Channeling
- Increasing marketing and sales effort
- Power of brands
- New interactions models with customer
- New focus of marketing (cf. Masciadri/Zupancic 2013, p. 10-13; Burmann et al. 2015, p. 208f.)

<u>Specifics in B2B communication</u>

Communications in the B2B sector are more demanding than in the B2C sector. The reason is that marketing activities are not focusing on one stage rather on more stages – called Multi-Stage-Marketing. Therefore, in B2B deeper and broader communication activities are necessary (cf. Masciadri/Zupancic 2013, p. 24). The communication measures should focus on the benefits of buying a product or service as customers are interested in a solution for their problems. Moreover, the customer needs met by the offer should be included (cf. Kotler/Pfoertsch 2006, p. 106). Possible customer needs are:

- reduce costs, time or overheads,
- improve productivity and/or quality, and
- increase flexibility and expandability (cf. Kotler/Pfoertsch 2006, p. 106).

In addition, the creation of advertisements as well as the choice of communication instruments differ in the B2B sector (cf. Bausback 2007, p. 54).

Additional challenges for B2B communications are:

- communicating on different sales levels,
- appropriate addressing of the buying centre,
- long-term individualized relationship building, and
- mental differences between functional units (cf. Masciadri/Zupancic 2013, p. 31f.).

In B2B it is difficult to suppose how the customers perceive and process the communication messages and consequently influence the decision making process within an organization. Each individual member of the buying centre is influenced by communication measures and influences other members. Furthermore, the motivation and rate of involvement in the buying process vary according to the personal usage of the purchased product or the interest in the buying task. Therefore, in B2B communications it is crucial to consider personal effects and interaction within the buying centre as well as emotional motives for making a purchase decision (cf. Chlebišová/Kyzeková/Zajarošová 2011, p. 1231).

5.2 Integrated Marketing Communication

According to the American Marketing Association, IMC is “A planning process designed to assure that all brand contacts received by a customer or prospect for a product, service, or organization are relevant to that person and consistent over time” (American Marketing Association 2017b).
Kotler defines IMC as: "IMC is the concept under which a company carefully integrates and coordinates its many communications channels to deliver a clear, consistent and compelling message about the organisation and its products" (Kotler/Armstrong 1999, p. 542).
According to Esch, IMC describes the content and formal coordination as well as temporal integration of all communication measures, to unify and strengthen the impressions created at the customer over time (cf. Esch 2014, p. 229-231).

For this thesis, the definition of Esch will apply as it considers the time component as well.

5.2.1 *IMC Objectives*

The intention of an integrated marketing communication is to create a uniform appearance at the target group. This is achieved by coordinating the communication measures regarding content, formality and timing. The objective is to develop consistent and thus reliable communication measures which are positively influencing the target customers (cf. Bruhn 2014, p. 39).

The IMC targets are divided into three categories including:

- economic targets,
- psychological targets, and
- performance targets (cf. Bruhn 2014, p. 40).

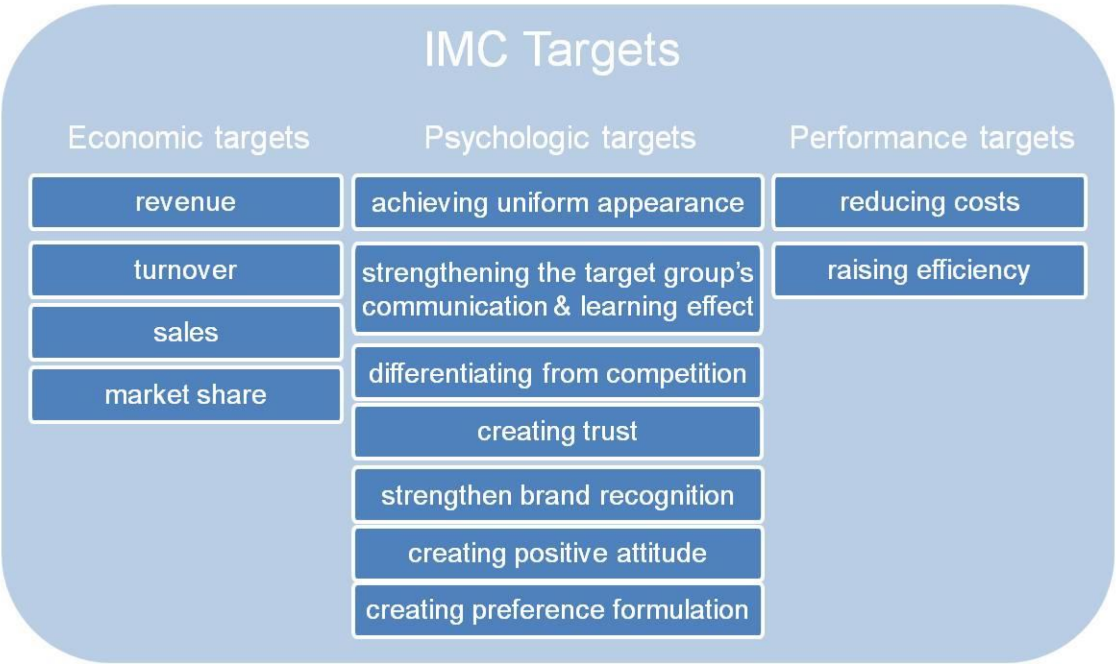


Table 5: IMC targets (based on Bruhn 2014, p. 40; Köhler 2009, p. 37)

The economic targets include increasing revenue, turnover, sales and market share (cf. Aerni/Bruhn 2012, p. 98; Esch 2014, p. 193). The psychological targets for IMC include creating a uniform appearance at the target group and therefore reach differentiation from competition. In addition, an objective is to strengthen the communication and learning effect by coordinated advertising measures. Additionally, an aim of high priority is to create trust at the target group (cf. Bruhn 2014, p. 40). Finally, strengthen brand recognition, creating a positive attitude and preference formulation are among psychological targets (cf. Köhler 2009, p. 37). Performance targets include decreasing costs through IMC. This is achieved by avoiding double work and the improved coordination of communication tasks within the company. Moreover, the use of synergy effects raises the efficiency of communication measures (cf. Bruhn 2014, p. 40).

5.2.2 3 IMC Elements

In order to reach a consistent appearance at the target group it is essential to coordinate the three basic elements of IMC (cf. Bruhn 2014, p. 123-130).

The three IMC elements are:

- content-related integration,
- formal integration, and
- temporal integration (cf. Esch 2014, p. 199).

Forms of integration	Subjects	Objectives	Tools	Time horizon
Content-related integration	Thematic coordination of content	• Consistency • Independence • Congruence	Uniformity in: • Messages • Arguments • Statements	Long-term
Formal integration	Fulfilment of formal design principles	• Presence • Conciseness • Clarity	Uniformity in: • Logo • Brand name • Layout • etc.	Middle- and long-term
Temporal integration	Coordinition within and between planning horizon	• Consistency • Continuity	Action Plans for timing	Short-term

Figure 15: IMC elements (based on Bruhn 2014, p. 144)

The **content-related integration** includes the thematic coordination of communication instruments and mediums. It helps companies to communicate their positioning and strategic focus. To coordinate the content, core messages and arguments of a brand can be used (cf. Bruhn 2014, p. 123; Esch 2014, p. 199-201).

The content-related integration consists of recurring verbal statements including:

- Slogans
- Spoken or sung content
- Written content (cf. Wirtschaftslexikon 2018)

The verbal statements have either an identical wording or the same positioning content (cf. Wirtschaftslexikon 2018).

The **formal integration** is about linking the communication instruments and mediums through design principles. Design principles in the frame of communication are:

- Company or brand logo
- Brand name
- Brand signals
- Layout
- Typography
- Colors
- Key images (cf. Bruhn 2014, p. 125; Esch 2014, p. 199-201)

The design principles for communication are part of the corporate design measures of a company. These principles are not transporting positioning content, but support in anchoring the brand in the customer's mind and strengthen the capacity for remembering (cf. Wirtschaftslexikon 2018).

The **temporal integration** focuses on the timely coordination of communication instruments and methods. This includes the coordination between different communication instruments as well as the continuity within a communication instrument (cf. Bruhn 2014, p. 130; Esch 2014, p. 199). The coordination between different communication instruments guarantees that the instruments assist each other over time. The continuity within a communication instrument is achieved by developing long-term communication concepts which cause learning effects at the recipients (cf. Bruhn 2014, p. 130f.).

To be able to timely coordinate the communication activities an annual communication plan needs to be set up. This communication plan includes fixed planning priorities (e.g. trade shows) and independent communication activities (cf. Bruhn 2012, p. 37). This means that the intensity of communication activities varies during the year. The peaks of communication are before yearly highlights such as events, new product launches or innovation developments. In addition, also seasonality has to be considered. Furthermore, the announcement of events and post-reports have to be communicated. Nevertheless, it is crucial to spread the communication activities over the year. This enables companies to build up relationships and control and optimize communication measures (cf. Kornath 2017). Therefore, the temporal integration requires companies to think and act in stages. For each stage different communication instruments can be applied which have to be coordinated chronologically (cf. Brandtner/Kilian 2010, p. 103-106).

5.2.3 IMC Instruments

The communication instruments are means by which companies inform, persuade and remind customers about its products and brands. Communication measures act as a voice of the brand and are a platform to create a dialog and build relationships with customers (cf. Kotler/Pfoertsch 2006, p. 110). Operative brand communication aims to address the target group via:

- Classical/mass communication instruments (above-the-line activities)
- Personal/interaction-oriented communication instruments (below-the-line activities) (cf. Burmann/Launspach 2010, p. 174f.; Esch 2014, p. 201f.)

Each instrument contributes differently to a brand launch, as shown in the table below.

Criteria	Advertising media/instrument						
	Brochures	Print	Billboards	TV	Cinema	Fairs	Sponsorship
Reach	Low	High	Low	High	Low	Low/ high	Low/ high
Address	Precise	Depends on medium	Random	Depends on medium	Depends on medium	Wide/ precise	Wide/precise
Involvement	High	Low to middle	Low	Low	High	Low to middle	Low
Information/ Activation competition	Low	Depends on medium	Middle to high	High	High	Low/ high	High
Chance of contact	High	High	Middle to high	Low	High	High	High
Abortion likelihood	Low	Low/ high	Middle to high	High/ low	Low	Low/ high	Low/high
Brand awareness	Low	High	High	High	Middle	Low	Middle
Brand image	High	Middle to high	Low	High	High	Middle	Low

Table 6: IMC instruments – performance criteria & requirements (1) (based on Esch 2014, p. 202)

In table 7, additional communication instruments are shown.

Criteria	Advertising media/instrument					
	Events	Guerilla Marketing	Website	Mobile Marketing	Social Media	Viral Marketing
Reach	Low/high	Low to high	Low	Middle to high	Middle to high	Middle to high
Address	Wide/ precise	Wide to precise	Precise	Precise	Precise	Wide to precise
Involvement	Middle to high	Low to middle	Middle to high	Middle to high	Middle to high	Middle to high
Information/ Activation competition	Low	Middle to high	Low	Middle to high	Middle to high	Middle to high
Chance of contact	High	Middle to high	Low	Middle to high	High	Middle to high
Abortion likelihood	Low/high	Middle	Depends on user	Depends on user	Depends on user	Depends on user
Brand awareness	-	Low to middle	-	Low	Low	Low to middle
Brand image	High	Middle to high	Middle	High	High	High

Table 7: IMC instruments – performance criteria & requirements (2) (based on Esch 2014, p. 202)

In B2B especially the following instruments are valuable for brand communication:

- Personal selling
- Direct marketing
- Web presence
- Public Relations (PR)
- Events, trade shows and exhibitions
- Sales promotion
- Sponsorship (cf. Burmann/Launspach 2010, p. 174; Kotler/Pfoertsch 2006, p. 110)

Criteria for selection an IMC instrument

To choose the most appropriate communication channels to strengthen the brand image, three aspects have to be considered:

- Type of brand image
- Target group's brand attitude
- Target group's involvement (cf. Esch 2014, p. 196)

Finally, the budget defines the financial resources allocated for the brand communication measures.

5.3 Budget for Communication

The purpose of budgeting is to decide how the financial resources are distributed on different brand building activities in order to reach the positioning objectives. Therefore, budgeting is an important instrument to implement strategic plans through operative measures (cf. Burmann et al. 2015, p. 172). The specification and distribution of the communication budget depends on the predefined objectives (cf. Burmann et al. 2015, p. 208).

In order to specify a budget for IMC, two aspects have to be considered:

- Size of the budget
- Distribution of the budget (cf. Bruhn 2014, p. 255)

To determine the **size of the budget**, 6 different methods can be distinguished:

- Percentage of a reference value (sales, revenue, profit)
- Budget based on what company can afford
- Same size of budget as the year before
- In consideration of the market share
- Orientation on communication expenditure of competition – 'Competitive-Parity-Method'
- Calculation based on objectives and planned communication measures
- Analytic methods (cf. Bruhn 2014, p. 255f.; Wright 2004, p. 415)

The **distribution of the budget** can be carried out in two ways:

- Communication portfolio showing the priority of different communication channels
- Scoring-models including evaluation criteria and weighting (cf. Bruhn 2014, p. 256f.)

6 Brand Positioning Controlling

"You cannot manage what you cannot measure" (Klingebiel, 1997, p. 658).

Brand controlling is a coordination function to support brand-specific planning and controlling processes within the company. It is about providing information and consulting of all departments dealing with brand management (cf. Meffert/Burmann/Kirchgeorg 2015, p. 341). Brand controlling aims to measure the effectiveness and efficiency of brand management. The objectives are to guarantee the effectiveness by choosing the right measures in order to reach the brand objectives as well as efficient use of these measures for the best possible output/input ratio (cf. Braun 2011, p. 161).

Brand positioning controlling can be implemented on strategic and operative level.

Strategic positioning controlling

One key element of strategic positioning controlling is result monitoring. These measures are implemented at the target group or within the company and include:

- Economic (quantitative) target figures
- Psychographic (qualitative) target figures (cf. Esch 2014, p. 621; Großklaus 2015, p. 203).

Within strategic positioning controlling, economic KPI's such as turnover, sales and market share are monitored. For measuring psychographic target figures, annually analysis regarding brand strength, central brand drivers, influencing factors for customer acquisition and retention as well as brand value are essential (cf. Großklaus 2015, p. 203f.; Esch 2014, p. 634). Additionally, regularly effect analysis of the brand activities have to be conducted – called brand tracking. Brand tracking includes analysis of the brand awareness, sympathy and image as well as preferences. In addition, efficiency controls have to be carried out. They monitor the relation of the output (e.g. improvement of awareness and image) to the input (money spend on implementation of positioning). It is advisable to carry out such an analysis every or every second month. (cf. Esch 2014, p. 632f.; Meffert/Burmann/Kirchgeorg 2015, p. 732-735).

Generally, psychographic target figures are a precondition to reach economic brand success (cf. Esch 2001, p. 279).

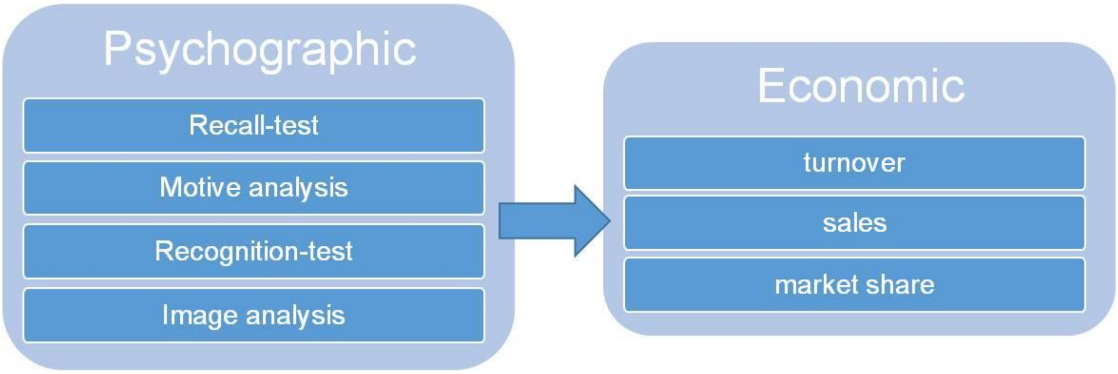


Figure 16: Psychographic and economic target figures (cf. Großklaus 2015, p. 203f.)

Operative positioning controlling

Operative positioning controlling monitors the implementation of the brand positioning through integrated marketing communication and includes:

- Process controlling: integration degree of communication projects
- Effective controlling: communication impact including economic and psychological elements
- Efficiency controlling: economic use of budget in comparison to economic targets (cf. Aerni/Bruhn 2012, p. 111f.)

Moreover, within operative positioning controlling each communication discipline is analyzed separately. This means, that each single communication discipline – advertising, public relation, sales promotion etc. – is monitored regarding its integration, effectiveness and efficiency independent from each other (cf. Aerni/Bruhn 2012, p. 112f.).

7 Conclusion and Transition to Practical Section

In the theory it turned out that the pharmaceutical industry differs from other industries in its quality regulations, buying behaviour and supplier management. For developing a brand positioning concept five different steps have to be considered:

1. Defining a brand positioning objective
2. Selecting a brand positioning strategy
3. Developing brand positioning ideas
4. Implementing the brand positioning through the Marketing Mix
5. Conducting brand positioning controlling

For creating an integrated communication guideline to transfer the brand positioning, three key points have to be considered:

- Guarantee content-related, formal and temporal integration
- Selection and timing of communication instruments
- Budgeting of communication measures

To be able to develop a brand positioning concept for the French pharmaceutical market, a broad information base about the market, target group and competitors is needed. To gather this information, a secondary as well as primary market research is carried out in the practical section. Based on the results of the market research, the brand positioning concept for Stölzle Glass Group in the French pharmaceutical market is developed. In addition, an IMC guideline is developed to communicate the brand positioning.

8 Company Analysis of BU Pharma

In chapter 8 the business unit Pharma of Stölzle Glass Group is analysed. The analysis includes the key facts and development of the BU, current customer base as well as brand identity.

8.1 Key Facts

In the table below, some general key facts about Stölzle are shown:

Year of foundation	1805
Employees	2.500
Position in the Pharma market	5th position for moulded glass packaging (Type III)
Revenue 2017 in Pharma	€ 80 million in moulded glass packaging
Headquarter	Austria
Production sites	6 production sites for primary glass packaging 1 in France / 1 in Austria / 1 in UK / 1 Czech Republic / 2 in Poland
Pharmaceutical products	Type III glass packaging
Offer Type III in Pharma	Dropper, syrup, medicine, injection, infusion bottles, tablet jars, ointment jars, wide mouth packers Amber, flint and green glass

Table 8: Key facts about Stölzle Glass Group (cf. Stölzle Glass Group 2017a)

Stölzle is on the 5th position for Type III glass packaging worldwide. The company runs a production site in France, but this plant is not equipped to produce pharmaceutical glass packaging. The best selling pharmaceutical packaging glass from Stölzle are dropper and syrup bottles. In contrast, pharmaceutical packaging leftovers are customized containers with slightly changes to standards. Overall, Stölzle clearly sells more standard than customized bottles (cf. Luccarda 12.03.2018).

At the moment, Stölzle does not have an USP for its pharmaceutical business, as there is no differentiation potential for the glass containers/certifications, the distribution nor the pricing (cf. Luccarda 12.03.2018).

8.2 Development

The business unit Pharma has developed in a very positive way since 2011 – as shown in table 9. Stölzle achieved significant growth in revenue, quantity sold and produced and number of customers.

	2011	2017	Growth	Growth %
Revenue Pharma	€ 43 million	€ 79 million	**+ € 36 million**	**+ 84%**
Quantity sold	775 million	1.6 billion	**+ 825 million**	**+ 106%**
Quantity produced	880 million	1.45 billion	**+ 570 million**	**+ 65%**
Customers	693 customers	827 customers	**+ 134 customers**	**+ 19%**

Table 9: Growth of BU Pharma from 2011 to 2017 (based on Stölzle Glass Group 2018a)

Until the end of 2020 a revenue growth of 20% to € 95 million is estimated compared to 2017 (cf. Stölzle Glass Group 2018a).

8.3 Customer Base

8.3.1 BU Pharma

In total, Stölzle sold its pharmaceutical containers to 827 different customers in 63 countries in 2017. The table below shows the ranking of the most supplied countries by revenue and quantity.

Country	Revenue
1. USA	€ 16.8 million
2. Germany	€ 11.9 million
3. Italy	€ 5.4 million
4. Poland	€ 4.5 million
5. Russia	€ 3.6 million
6. France	€ 3.5 million
7. Austria	€ 3.2 million
8. Hungary	€ 3 million

Country	Quantity
1. USA	303 million
2. Italy	178 million
3. Germany	172 million
4. France	89 million
5. Poland	89 million
6. Egypt	84 million
7. Russia	75 million
8. Belarus	73 million

Table 10: Ranking of countries regarding revenue made and quantity sold (based on Stölzle Glass Group 2018)

The most bottles are sold to the USA, Germany and Italy, where also the highest revenue was made.

8.3.2 France

In 2017, Stölzle supplied 27 pharmaceutical manufacturers in France. By selling 89 million glass containers, € 3.5 million have been generated. The estimated market share in France is 4% (cf. Luccarda 12.03.2018). The following table shows the company's customers in France and their demand for glass packaging:

Customer	Revenue	Quantity	Demand	Company size
Gravis Trelazé	€ 1.141.510	33.924.479	dropper	10 – 49 employees
Famar Orleans Sas	€ 488.414	19.570.926	syrup, injection, dropper	> 250 employees
Laboratoires URGO SAS	€ 260.215	5.606.992	dropper, syrup, medicine	50 – 250 employees
B.I.O. (Business International Opp	€ 235.557	4.154.664	syrup, dropper	50 – 250 employees
Soflac Sas	€ 191.291	3.840.340	dropper	10 – 49 employees
Laboratoires Boiron	€ 173.956	3.551.637	syrup, medicine, dropper	> 250 employees
Pont Emballage	€ 171.480	2.839.640	dropper, medicine, syrup, talbet jars	50 – 250 employees
Laboratoires Galderma	€ 167.140	3.791.580	dropper	> 250 employees
Farmaclair	€ 116.099	1.913.070	dropper	> 250 employees
Laboratoire Bausch & Lomb Chauvin	€ 102.122	2.687.412	flacon	> 250 employees
Pierre Fabre Medicament	€ 84.780	1.485.560	dropper	> 250 employees
Phytéo Laboratoire	€ 80.283	1.451.878	dropper, syrup, medicine	50 – 250 employees
Elixirs & Co.	€ 72.606	803.589	dropper	10 – 49 employees
ID Labo	€ 29.427	519.444	dropper, syrup, medicine	50 – 250 employees
Thépenier Pharma Industrie	€ 28.345	202.176	medicine	50 – 250 employees
Gravis Orly	€ 28.023	529.150	dropper, tablet jars	50 – 250 employees
Sa Fidel	€ 27.185	381.868	dropper, syrup	50 – 250 employees
Puressentiel	€ 15.125	249.760	syrup	> 250 employees
Laboratoires Chemineau	€ 11.491	147.456	tablet jars, dropper	> 250 employees
Sopac Medical	€ 10.206	202.972	injection, syrup, dropper, medicine	50 – 250 employees
Europackcom	€ 8.506	51.120	syrup	50 – 250 employees
Sa Fillaud	€ 7.181	130.216	syrup, dropper	50 – 250 employees
Cosmetique Active Production	€ 5.253	33.264	dropper, medicine, syrup, tablet jars	> 250 employees
Urgo Chenôve	€ 2.259	32.261	dropper	> 250 employees
FIDEL Rhône-alpes	€ 540	11.232	dropper	10 – 49 employees
CO.GE.AP	€ 423	10.584	syrup	> 250 employees
Laboratoire Biocrystal	€ 410	2.856	dropper	50 – 250 employees

Table 11: Customer base in France in 2017 (based on Stölzle Glass Group 2018a)

The French customer base includes big pharmaceutical concerns as well as midsize and small laboratories. The companies are active in different areas – classical, homeopathic and herbal medicine (cf. Stölzle Glass Group 2018a).

9 Analysis of the Business Environment

In chapter 9 the business environment of Stölzle Glass Group is analysed. The analysis focuses on the French pharmaceutical market and includes general market data, target group and competitor analysis as well as trends.

9.1 French Pharmaceutical Market Data

France is a key player in the worldwide pharmaceutical industry. On a global view France is the 5th largest market for human medicines and the 2nd largest in Europe. In 2016, French pharmaceuticals manufacturers generated a revenue of more than € 54 billion by selling pharmaceuticals, where half was gained through exports. In France, eight billion drug packs are produced each year by 270 pharmaceutical production sites (cf. Leem – Les Entreprises du Médicament 2016, p. 16-22; Schierer 28.02.2018).

With € 25.8 billion, the pharmaceutical sector is the 2nd largest exporting industry in France (cf. Leem – Les Entreprises du Médicament 2016, p. 16-22). The most frequent destination was the EU (€ 15.6 billion), followed by America (€ 3.4 billion), Africa (€ 2.7 billion), Asia (€ 2.6 billion) and the Middle East (€ 0.9 billion). The three leading countries for exports are Germany, Belgium and the United States (cf. Leem – Les Entreprises du Médicament 2016, p. 17). In addition, France is the 4th largest exporter of pharmaceuticals globally (Pénicaud 2016, p. 4).

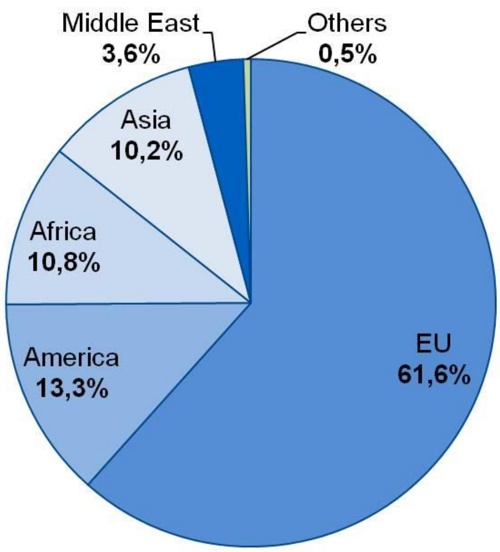


Figure 17: Global export of French pharmaceutical companies (based on Leem – Les Entreprises du Médicament 2016, p. 17)

France, UK and Germany are the largest contributors to the absolute value added in the pharmaceutical industry within the EU – with € 10 billion each. These three nations generate between 15% and 20% of the overall value added volume in the EU. France is the only one of the five biggest European national economies, where the share of the pharmaceutical industry is considerably above the EU average (cf. Vekeman 2015, p. 1).

9.2 Target Group Analysis

The target group of Stölzle in the French market are all pharmaceutical companies which make use of Type III primary glass packaging for all kinds of medicines. There is no restriction to company size, type of medicine or demand for glass packaging. In the future, Stölzle aims at focusing on companies selling prescription drugs, generic drugs and Over-The-Counter (OTC) medicine. Regarding the company size, Stölzle targets midsized companies (cf. Luccarda 12.03.2018).

In France more than 200 pharmaceutical manufacturers are located in different company sizes: from newly established start-ups to family-owned laboratories, mid-sized companies to major enterprises. Most of these companies act internationally, headed by Sanofi – the world 3rd largest pharmaceutical company (cf. Pénicaud 2016, p. 4). A list of the most attractive pharmaceutical manufacturers in France – ranked according to revenue made in 2016 – can be found in the appendix on page A-20.

9.3 Competitor Analysis

In chapter 9.3 an analysis of the competition in the French pharmaceutical market is shown.

9.3.1 Competitive Environment in France

According to the worldwide market shares and Stölzle's Sales Director of BU Pharma, SGD Pharma, Gerresheimer, Bormioli Pharma and Piramal Glass are the main competitors in the French pharmaceutical market (cf. Stölzle Glass Group 2017g; Luccarda 23.01.2018).

The worldwide market share by turnover in 2017 for pharmaceutical Type III glass packaging is as follows:

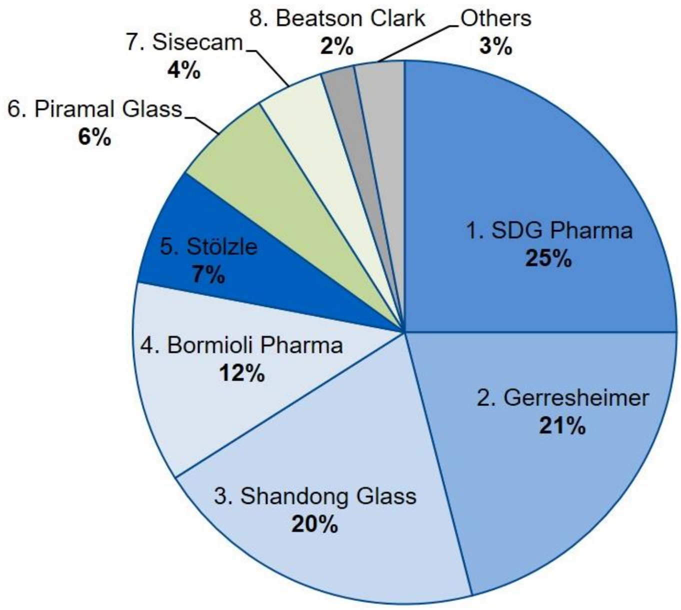


Figure 18: Worldwide market share for Type III glass packaging (based on Stölzle Glass Group 2017g)

Shandong Glass is no further considered, even if the company is on the 3rd market position. The reason is that Europe is no key market and the company is not established in Europe (cf. Stölzle Glass Group 2017g).

The author of this thesis describes the four main competitors in the French pharmaceutical market including some general company data and the brand identity. The brand identity will provide a picture of all attributes connected to the brand such as brand benefit, tonality, attributes and picture. This will help to compare the brands and identify similarities and differences.

9.3.2 SGD Pharma

SGD Pharma is the worldwide market leader in the production of moulded packaging glass (Type III). In addition, the company is a new actor on tubular vials and ampoules (Type I). SGD Pharma is with two production sites strongly established in France (cf. SGD Pharma 2018).

Key facts

Year of foundation	1896
Employees	2.750
Position in the Pharma market	Market leader for moulded glass packaging (Type III)
Revenue 2017 in Pharma	€ 280 million in moulded glass packaging
Headquarter	France
Production sites	5 production sites for primary glass packaging 2 in France / 1 in Germany / 1 in China / 1 in India
Pharmaceutical products	Type I, II and III glass packaging
Offer Type III in Pharma	Dropper, syrup, injection, infusion bottles, tablet jars Amber and flint glass

Table 12: Key facts about SGD Pharma (cf. SGD Pharma 2018; Stölzle Glass Group 2016a)

Brand identity

SGD Pharma has a very patent-oriented appearance, always putting the patient's health in focus. The company refers in its advertising messages to the key words trust and patient security and strengthens this message by using emotional pictures with humans. Figure 19 shows the brand identity of SGD Pharma from the author's point of view, described with the Brand Steering Wheel from Esch:

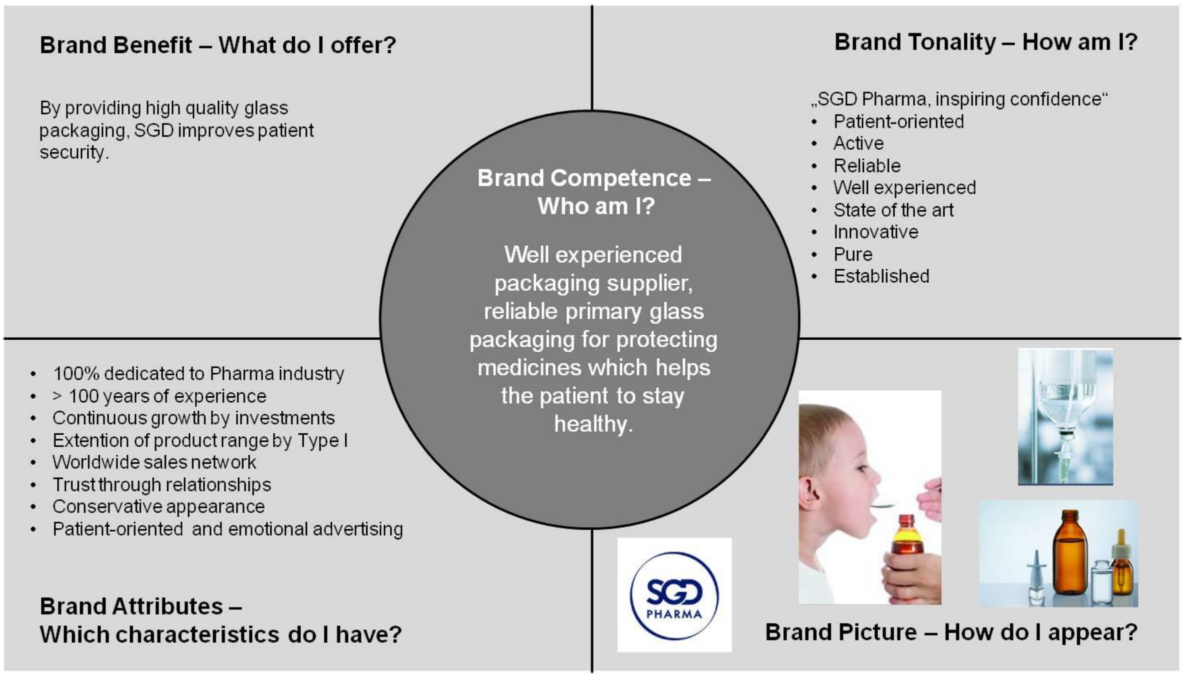


Figure 19: Perceived Brand Identity of SGD Pharma (own presentation based on SGD Pharma 2018; Esch 2018)

On the website, SGD Pharma appears very conservative by using less colors and a very clean background. With the slogan "SGD Pharma, inspiring confidence" the company implies that the customer and the patient can rely on their products.

9.3.3 Gerresheimer

Gerresheimer is the worldwide market leader in pharmaceutical primary packaging. The company offers Type I, II and III glass packaging and plastic packaging and runs one production site with primary glass packaging in France.

Key facts

Year of foundation	1864
Employees	10.000
Position in the Pharma market	Market leader for pharmaceutical packaging (glass & plastic) 2nd for moulded glass packaging (Type III)
Revenue 2017 in Pharma	€ 1.14 billion (glass and plastics) € 502 million in glass packaging (44% of € 1.14 bn) € 228 million in moulded glass packaging
Headquarter	Germany
Production sites	21 production sites for primary glass packaging 1 in France / 5 in Germany / 1 in Poland / 1 in Belgium / 3 in China / 4 in India / 1 in Singapore / 4 in USA / 1 in Mexico
Pharmaceutical products	Type I, II and III glass packaging / plastic packaging
Offer Type III in Pharma	Dropper, syrup, medicine, injection, infusion bottles, tablet jars, ointment jars, wide mouth packers, transfusion bottles Amber and flint glass

Table 13: Key facts about Gerresheimer (cf. Gerresheimer 2018; Stölzle Glass Group 2016a)

Brand identity

Gerresheimer appears customer- and solution-oriented, as they present themselves as a provider of safe and simple administration of medicines. Their advertising texts on their homepage emphasize their closeness to customers, understanding of customer needs as well as teamwork.

Figure 20 shows the brand identity of Gerresheimer from the author's point of view:

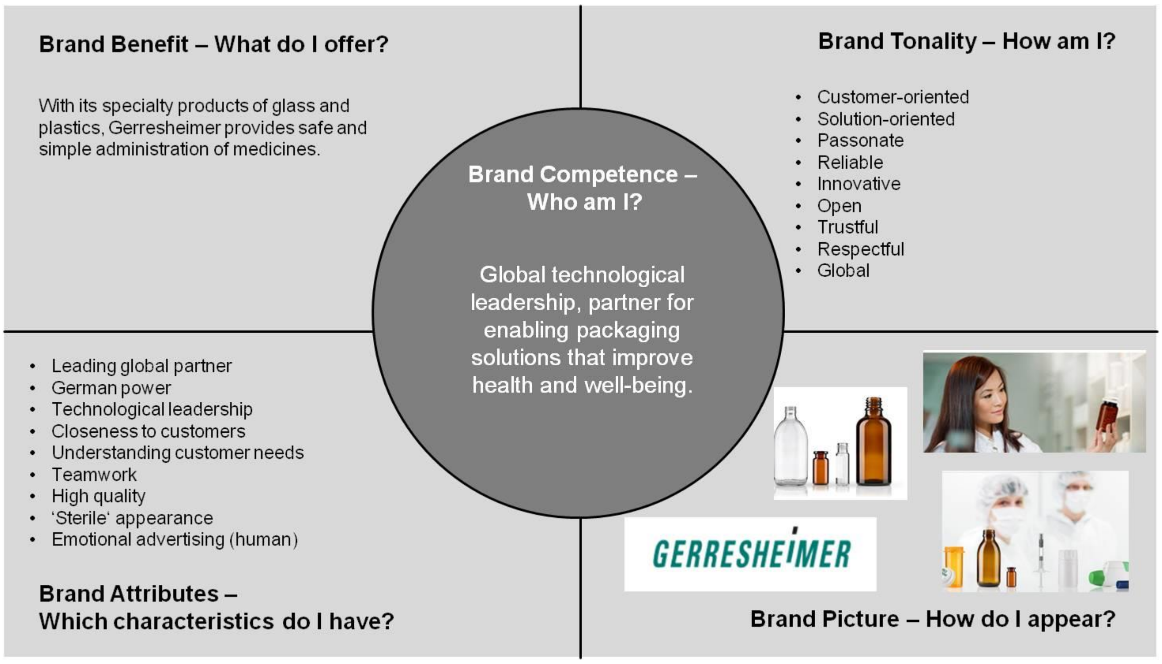


Figure 20: Perceived Brand Identity of Gerresheimer (own presentation based on Gerresheimer 2018; Esch 2018)

In addition, Gerresheimer positions itself as a leading global partner with 'German power'. The appearance on the website is very sterile because the background of the whole webpage and all product pictures is white. The company tries to awake emotions by using pictures with humans.

9.3.4 Bormioli Pharma

Bormioli Pharma offers Type I, II and III glass packaging and has one production site located in France (cf. Bormioli Pharma 2018).

<u>Key facts</u>

Year of foundation	1825
Employees	900
Position in the Pharma market	4th position for moulded glass packaging (Type III)
Revenue 2017 in Pharma	€ 130 million in moulded glass packaging
Headquarter	Italy
Production sites	5 production sites for primary glass packaging 1 in France / 4 in Italy
Pharmaceutical products	Type I, II and III glass packaging / plastic packaging
Offer Type III in Pharma	Dropper, syrup, injection, infusion bottles, tablet jars Amber and flint glass

Table 14: Key facts about Bormioli Pharma (cf. Bormioli Pharma 2018; Stölzle Glass Group 2016a)

Brand identity

Bormioli Pharma has a very similar appearance as SGD Pharma. The company appears patient-oriented, as they express to guarantee the full healing potential of the drugs contained in their packaging. Also their slogans "Bormioli Pharma – Health Inside" and "Health is in our DNA" indicate the focus on the patient. Figure 21 shows the brand identity of Bormioli Pharma from the author's point of view:

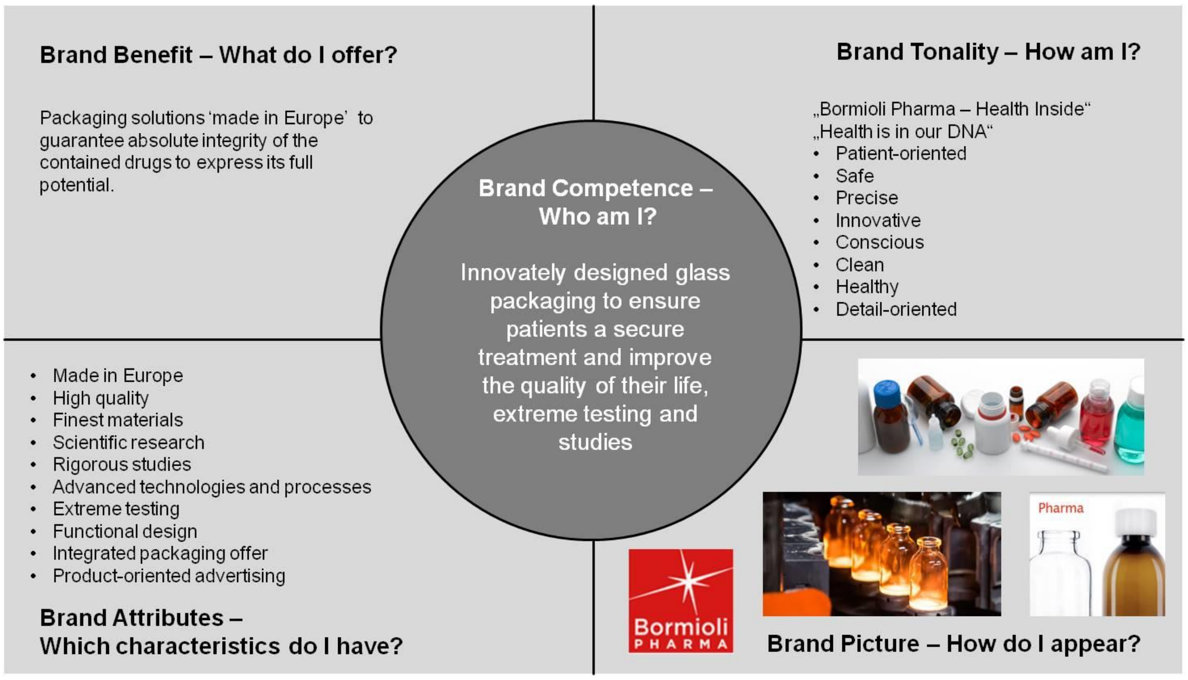


Figure 21: Perceived Brand Identity of Bormioli Pharma (own presentation based on Bormioli Pharma 2018; Esch 2018)

Additionally, Bormioli Pharma states in its advertising messages on their website, that they provide high quality packaging by using the finest materials, carrying out research and studies and implement extreme testing. The advertising in general is very product-oriented by showing many pictures of the production process and the end product.

9.3.5 Piramal Glass

Piramal Glass offers Type I, II and III glass packaging and is strongly established in Asia (cf. Piramal Glass 2018).

Key facts

Year of foundation	1984
Employees	4.000
Position in the Pharma market	6th position for moulded glass packaging (Type III)
Revenue 2017 in Pharma	€ 75 million in moulded glass packaging
Headquarter	India
Production sites	5 production sites for primary glass packaging 2 in India / 2 in USA / 1 in Sri Lanka
Pharmaceutical products	Type I, II and III glass packaging
Offer Type III in Pharma	Dropper, syrup, injection, infusion bottles, ointment jars, wide mouth packers Amber and flint glass

Table 15: Key facts about Piramal Glass (cf. Piramal Glass 2018; Stölzle Glass Group 2016a)

Brand identity

Piramal Glass positions itself as solution-oriented by providing 'world-class packaging solutions'. The company communicates to deliver an all-in-one solution from the bottle design to decoration and closures. Figure 22 shows the brand identity of Piramal Glass from the author's point of view:

Figure 22: Perceived Brand Identity of Piramal Glass (own presentation based on Piramal Glass 2018; Esch 2018)

The company communicates in its advertising to deliver fast and for low costs. In the opinion of the author, the slogan "Fired by imagination – moulded to perfection" does not fit to the overall brand identity. Finally, the website appearance of the company is old fashion by using paintings and unprofessional product pictures.

9.3.6 Conclusion of Competitive Environment

The French pharmaceutical glass packaging market is dominated by five companies which are able to deliver Type III glass containers: SGD Pharma, Gerresheimer, Bormioli Pharma, Stölzle Glass Group and Piramal Glass. Four of them are also providing Type I and II glass packaging, except Stölzle. Shandong Glass is not considered as a strong competitor in the French pharmaceutical market, since Europe is no key market of the company. The table below shows a comparison of the companies regarding different criteria.

Criteria	SGD Pharma	Gerresheimer	Bormioli Pharma	Stölzle	Piramal Glass
Market position FR	1	2	3	4	5
Production sites in FR	2	1	1	0	0
Glass types offered	Type I, II and III	Type I, II and III	Type I, II and III	Type III	Type I, II and III
Brand identity	Patient-oriented	Solution-oriented	Patient-oriented	Product-oriented	Solution-oriented
Keywords used	Trust, patient security	Closness to customer, teamwork	High quality through research	Certified quality & design	All-in-one, fast and at low costs
Visual appearance	Conservative/ sterile, less colours	Conservative/ sterile, less colours	Conservative/ sterile, less colours	Conservative/ sterile, less colours	Old fashion, colourful
Pictures used	Emotional picutres with humans	Emotional picutres with humans	Products & production pictures	Products & production pictures	Paintings, bad product presentation

Table 16: Overview of competition regarding company data and brand identity (own presentation)

With respect to the brand identity, two companies – SGD Pharma and Bormioli Pharma – are positioned patient-oriented. Gerresheimer and Piramal Glass are positioned solution-oriented. Stölzle is positioned product-oriented and describes glass packaging as an integrated part of the medicine.

9.4 Differentiation through Product, Distribution or Price

Glass Packaging

The glass packaging itself does not allow any differentiation potential. Glass is like metal which results out of a certain combination of raw materials and production process. Therefore, Stölzle provides the same Type III glass packaging compared to the competition (cf. Pöschl 05.03.2018).

Distribution

In general, all pharmaceutical glass packaging suppliers use the same ways of distribution: own sales offices, sales representatives as well as distribution agents. SGD Pharma, Gerresheimer and Piramal Glass also run production sites outside of Europe. Thus, they have a wider distribution network and are closer to the customers outside of Europe (cf. Luccarda 12.03.2018).

Price

Also a differentiation through price is hardly reached in the pharmaceutical glass packaging industry as price pressure prevails. In some areas – like North Africa – Stölzle is cheaper than competition but only to not dilute the price structure of Europe (cf. Luccarda 12.03.2018).

9.5 Trends in the Pharmaceutical Industry

In 2016, the sales revenue from pharmacy medicines counted € 20.3 billion. Between 2015 and 2016 the revenue in the reimbursable drug sector remained stable, but volumes declined slightly by 0.2%. The non-reimbursable drug sector increased by 1.7% to € 2.1 billion, while sales fell by 1.3% between 2015 and 2016 (cf. Leem – Les Entreprises du Médicament 2017, p. 4).

Across the French population, the consumption of drugs averaged € 511 per capita in 2015. Overall, € 34 billion worth drugs have been consumed in 2015. This is a minus of 0.5% in 2015 compared to 2014 (cf. Leem – Les Entreprises du Médicament 2017, p. 10).

The French pharmaceutical and healthcare sciences sector is worldwide known for its innovations. Due to one of the strictest legislation in Europe, French companies must invest a lot to bring new innovations to the market (cf. Pénicaud 2016, p. 8). This is the reason why the French pharmaceutical sector has the highest business enterprise R&D budget. It counted 9.8% of pharmaceutical company revenues – € 4.6 billion – in 2014 (cf. Leem – Les Entreprises du Médicament 2016, p. 17).

10 Conclusion of Company and Business Environment

Stölzle is on the 5th position in the worldwide pharmaceutical glass packaging market. The company has a market share of 4% in France by making a revenue of € 3.5 million in 2017. Stölzle does not have an USP in the pharmaceutical glass packaging industry.

France is the 5th largest market for human medicines worldwide and the 2nd largest in Europe. The French pharmaceutical companies made a revenue of € 54 billion in 2016, whereof half was gained through exports.

At the moment, Stölzle does not have a clear definition of the target group. In the future, Stölzle will focus on companies providing prescription drugs, generic drugs and Over-The-Counter (OTC) medicine. Regarding the company size, Stölzle will especially target midsized companies.

The French pharmaceutical glass packaging market is dominated by five companies: SGD Pharma, Gerresheimer, Bormioli Pharma, Stölzle Glass Group and Piramal Glass. SGD Pharma and Bormioli Pharma are both positioned patient-oriented, while Gerresheimer and Piramal Glass are positioned solution-oriented. In comparison to that, Stölzle positioned itself as product-oriented.

Differentiation through the glass packaging itself, the distribution or the price is not possible for Stölzle. The reasons are, that in the industry the same production process and distribution channels are used. For the pricing Stölzle faces a disadvantage, as the competition is not only selling Type III glass but also Type I and II.

11 Primary Market Research

For this master thesis an image analysis as primary market research was conducted for the French, German and Austrian pharmaceutical glass packaging market. This chapter includes the research design as well as the main findings.

11.1 Research Design

The research design for the primary market research is shown in the graph below:

Market Research Problem

Stölzle has never carried out an image analysis in the French, German or Austrian pharmaceutical market. But an image analysis builds the base for identifying a possible image gap and for developing a brand positioning concept for the French pharmaceutical market.

Goals of Market Research

Main goal

The goal of the primary market research is to carry out an image analysis of pharmaceutical glass packaging suppliers in the French, German and Austrian pharmaceutical market till 9th March 2018.

Subgoals

The subgoals of the primary market research are to find out:

- the general awareness level of the pharmaceutical glass packaging suppliers
- the image of pharmaceutical glass packaging suppliers
- the information sources and communication channels preferred within the pharmaceutical industry
- the customer's demand and constellation of the buying centre within pharmaceutical facilities

Need for Information

- STO's general level of awareness
- STO's current image
- Image of competition
- Target customer's demand
- Communication channels/sources

Survey Method

In order to receive representative results for the image analysis, a quantitative survey will be conducted.

Survey Period

Start: 05.02.2018
End: 09.03.2018

Population and Sampling

Population

All pharmaceutical companies which make use of primary glass packaging for their medicines and are situated in France, Germany or Austria.

Sampling

About 250 companies fulfill these requirements and therefore form the sample = complete survey.

Survey Instrument

- Standardized questionnaire
- Mainly closed questions
- Multiple choice, rating scales, semantic differential
- One open question for unaided brand awareness

Questionnaire Design

- Online survey
- Tool: SURVIO
- Languages: French, English and German
- Divided in 4 parts:
  1. General awareness level of pharmaceutical glass suppliers
  2. Image of pharmaceutical glass suppliers
  3. Information sources and communication channels
  4. Customer demand and buying centre of pharmaceutical manufacturers

Figure 23: Research Design (own presentation)

The detailed research design as well as the questionnaires in English, German and French can be found in the appendix on page A-21 to A-44.

11.2 Findings

The findings of the primary market research are divided into 4 parts – like the structure of the questionnaire:

- general awareness level and preferred suppliers
- image
- information and communication sources
- customer demand and buying process.

For each part, the overall findings of the research are interpreted – independent from the company location. In addition, the main differences and specifics between France and Germany/Austria are analyzed in each section – including comparison of Stölzle to the main competition. It must be noticed that the country-specific analysis have a lower representativeness due to the lower number of participants.

11.2.1 General Awareness Level and Preferred Suppliers

The analysis for the **unaided brand awareness** shows, that Gerresheimer, SGD Pharma and Stölzle were most frequently mentioned – shown in figure 24 (left side). The companies marked in green have been additionally mentioned by the test persons at 'Others'.

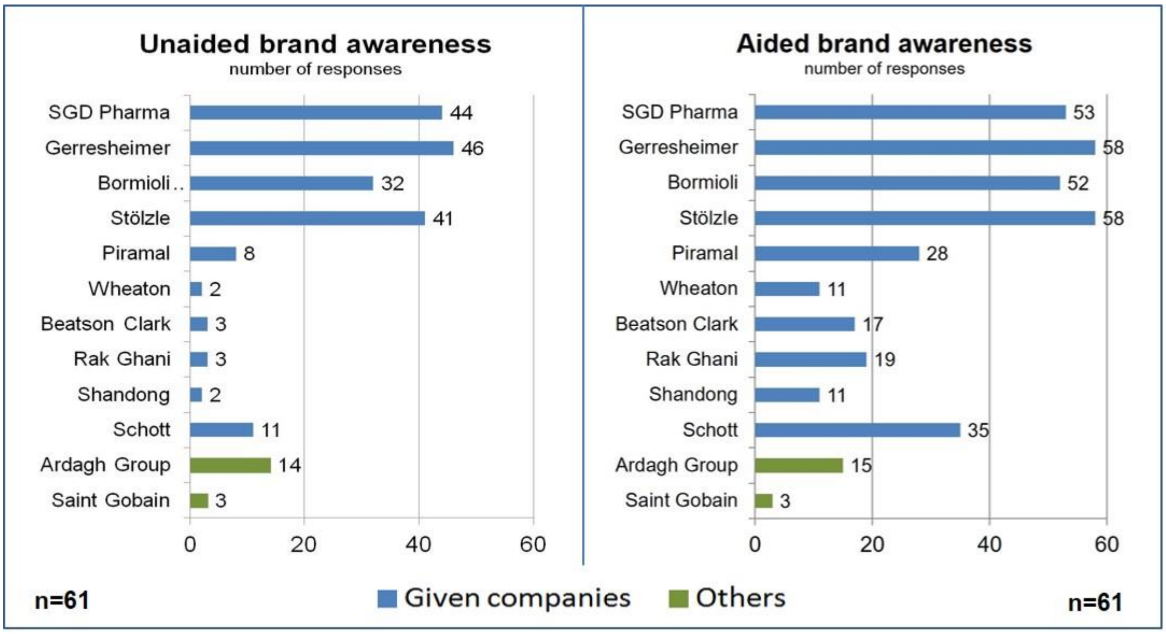


Figure 24: Comparison of unaided and aided brand awareness (own presentation)

The analysis for the **aided brand awareness** shows, that Gerresheimer and Stölzle Glass Group are the most frequently named companies, followed by SGD Pharma and Bormioli Pharma – as shown in figure 24 (right side). Thus Gerresheimer is the most well-known company for the unaided and aided brand awareness.

Figure 25 demonstrates the comparison of how often pharmaceutical glass packaging suppliers have been considered and selected.

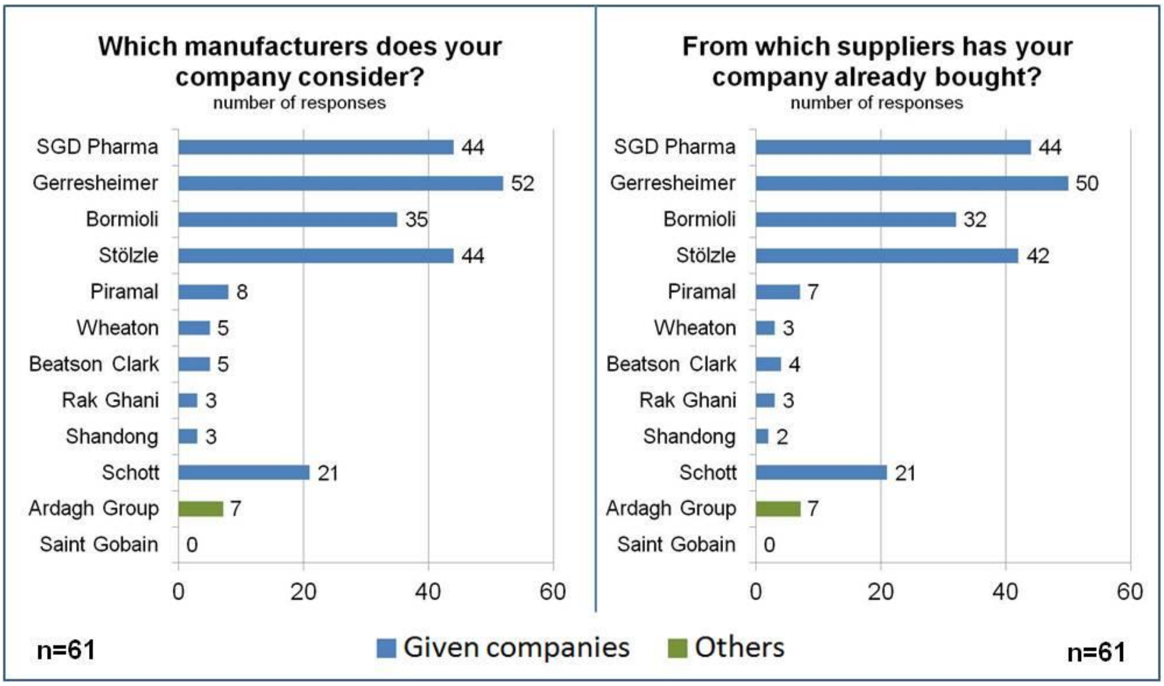


Figure 25: Frequency of considering and selecting glass packaging suppliers (own presentation)

In the research it turned out that Gerresheimer is the **preferred supplier** for pharmaceutical glass packaging. Gerresheimer is the glass packaging supplier most frequently considered as well as selected. SGD Pharma, Gerresheimer, Bormioli and Stölzle are closely related. This is an indicator that customers are often considering all 4 companies and also award contracts to all of them.

Main differences and specifics between France and Germany/Austria

In this section, the differences and specifics regarding brand awareness between France and Germany/Austria is analyzed.

The figure below shows the unaided and aided brand awareness split into French and German/Austrian test persons.

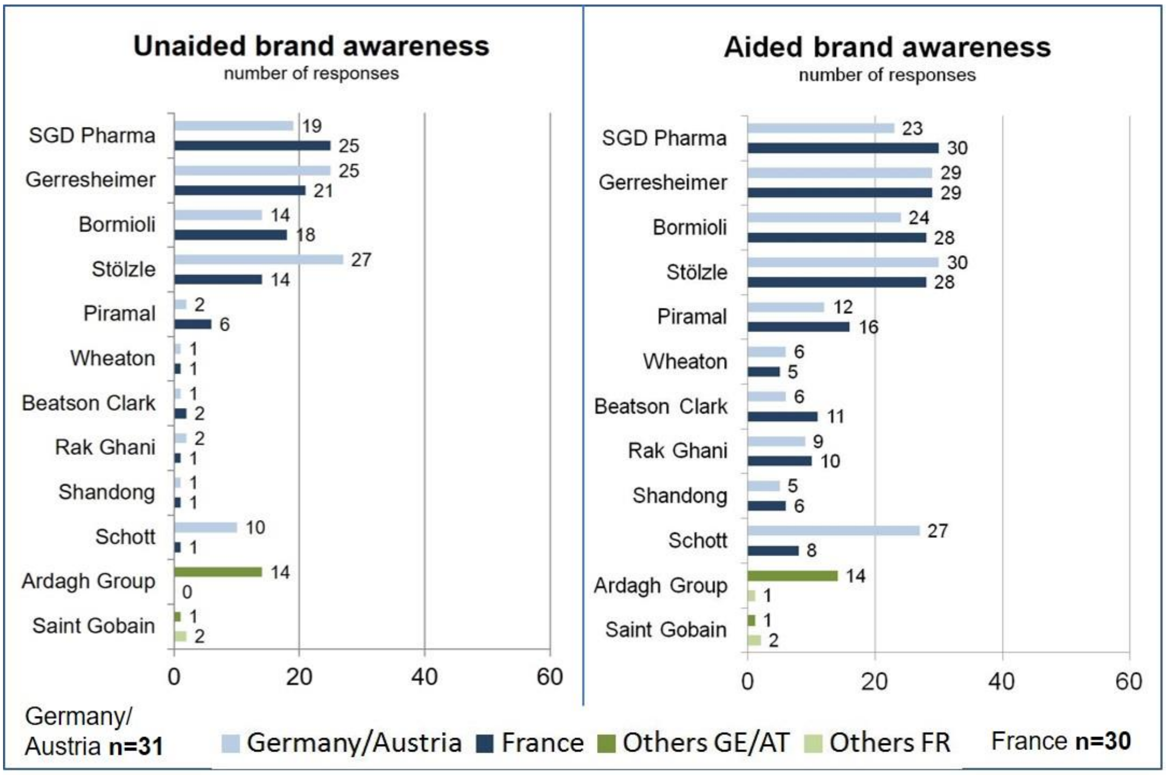


Figure 26: Analysis of unaided and aided brand awareness between countries (own presentation)

In the research it turned out that SGD is the most-well known company in France and Stölzle in Germany/Austria.

Figure 27 presents a comparison of how often the glass packaging suppliers are considered and selected in the different countries.

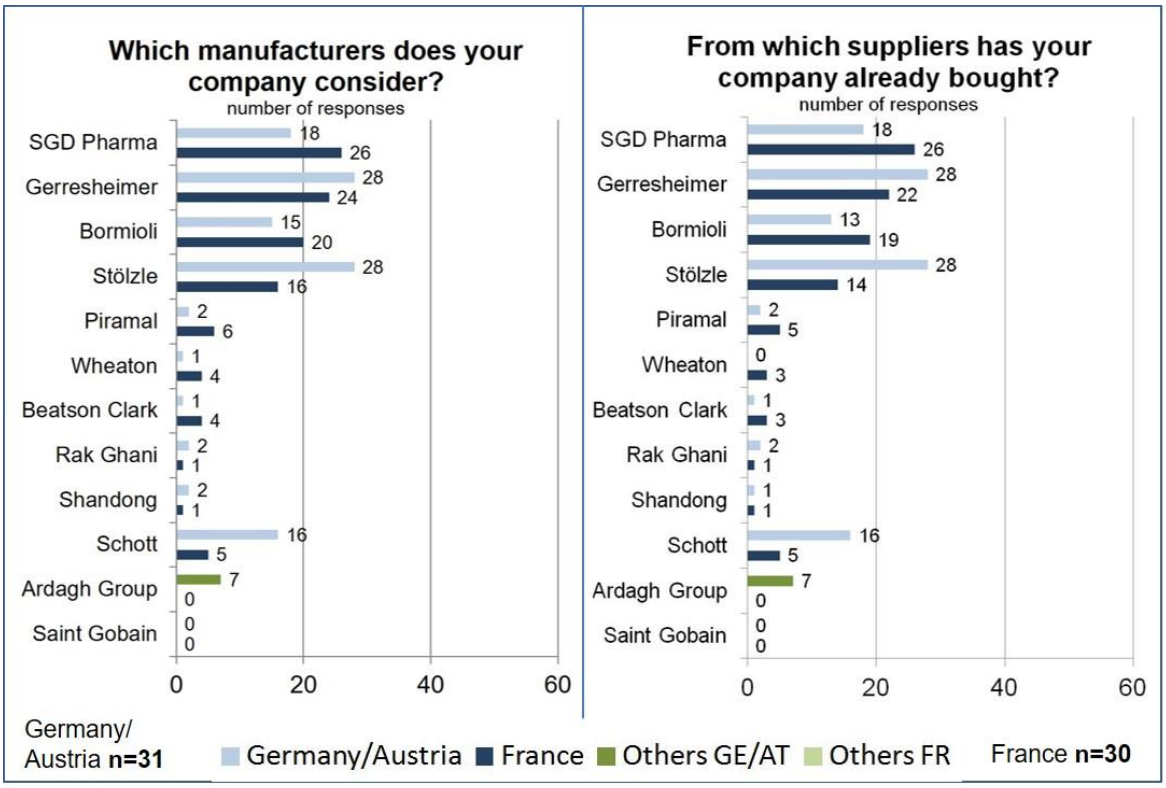


Figure 27: Analysis of preferred suppliers between countries (own presentation)

In graph 28, the differences regarding the brand awareness of Stölzle between France and Germany/Austria are shown.

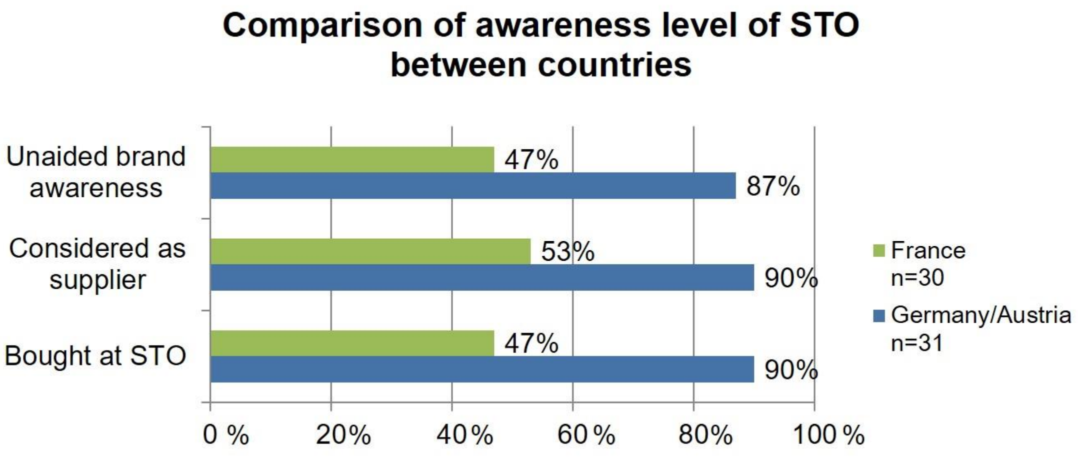


Figure 28: Awareness level of STO in France and Germany/Austria (own presentation)

It turned out that the unaided brand awareness in Germany/Austria is much better than in France. Additionally, in Germany/Austria Stölzle is more often considered (+37%) as pharmaceutical glass packaging supplier compared to France. Finally, nearly twice as many companies have bought glass containers from Stölzle in Germany/Austria compared to France.

11.2.2 Image Analysis

As shown in figure 29, the most important criteria for selecting a pharmaceutical glass packaging supplier for a **first purchase** is 'competent sales representatives', 'fast order processing' as well as 'good traceability of delivery'.

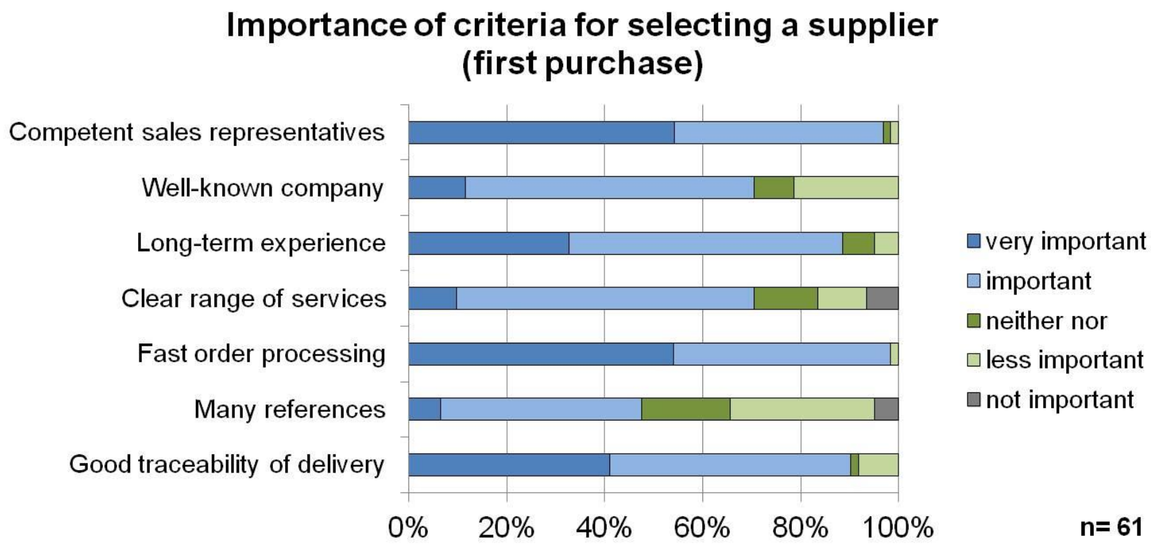


Figure 29: Importance of criteria for selecting a supplier (first purchase) (own presentation)

For a **repurchase**, the same criteria as for the first purchase are important - shown in figure 30.

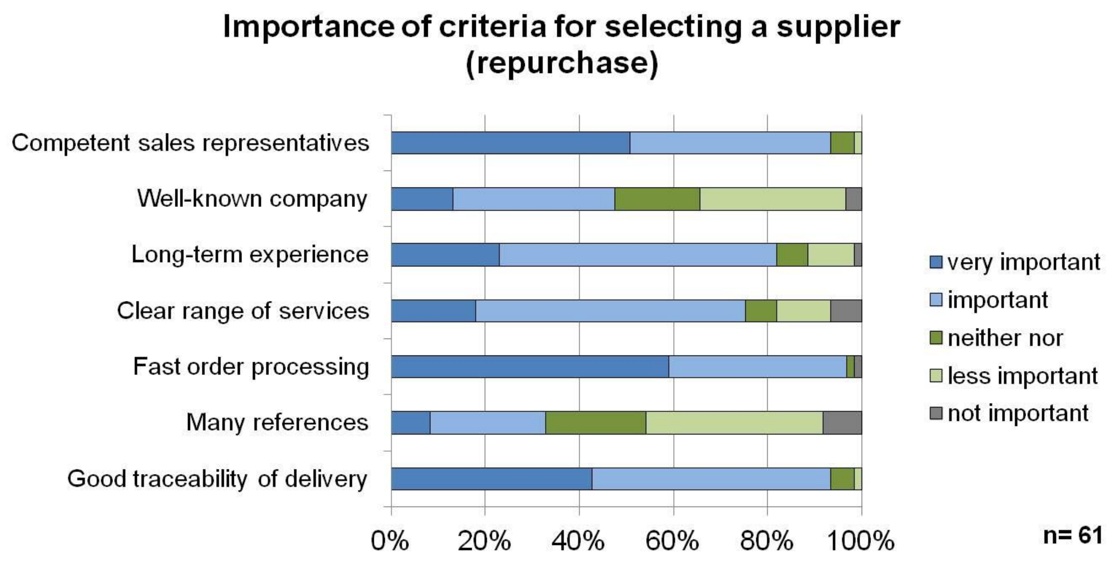


Figure 30: Importance of criteria for selecting a supplier (repurchase) (own presentation)

The two most unimportant criteria are the same as for a first purchase: 'many references' and 'clear range of services'.

Figure 31 shows the importance of different **criteria for selecting pharmaceutical glass packaging**. It turned out that the most important criteria is the 'high quality', followed by 'adequate certification'. Also a low price level is important, but not as much as the quality.

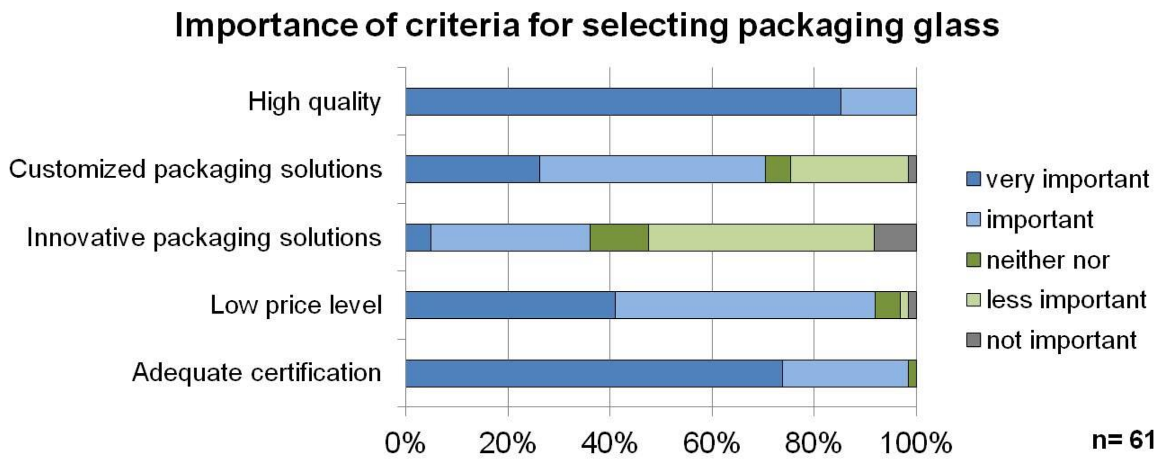
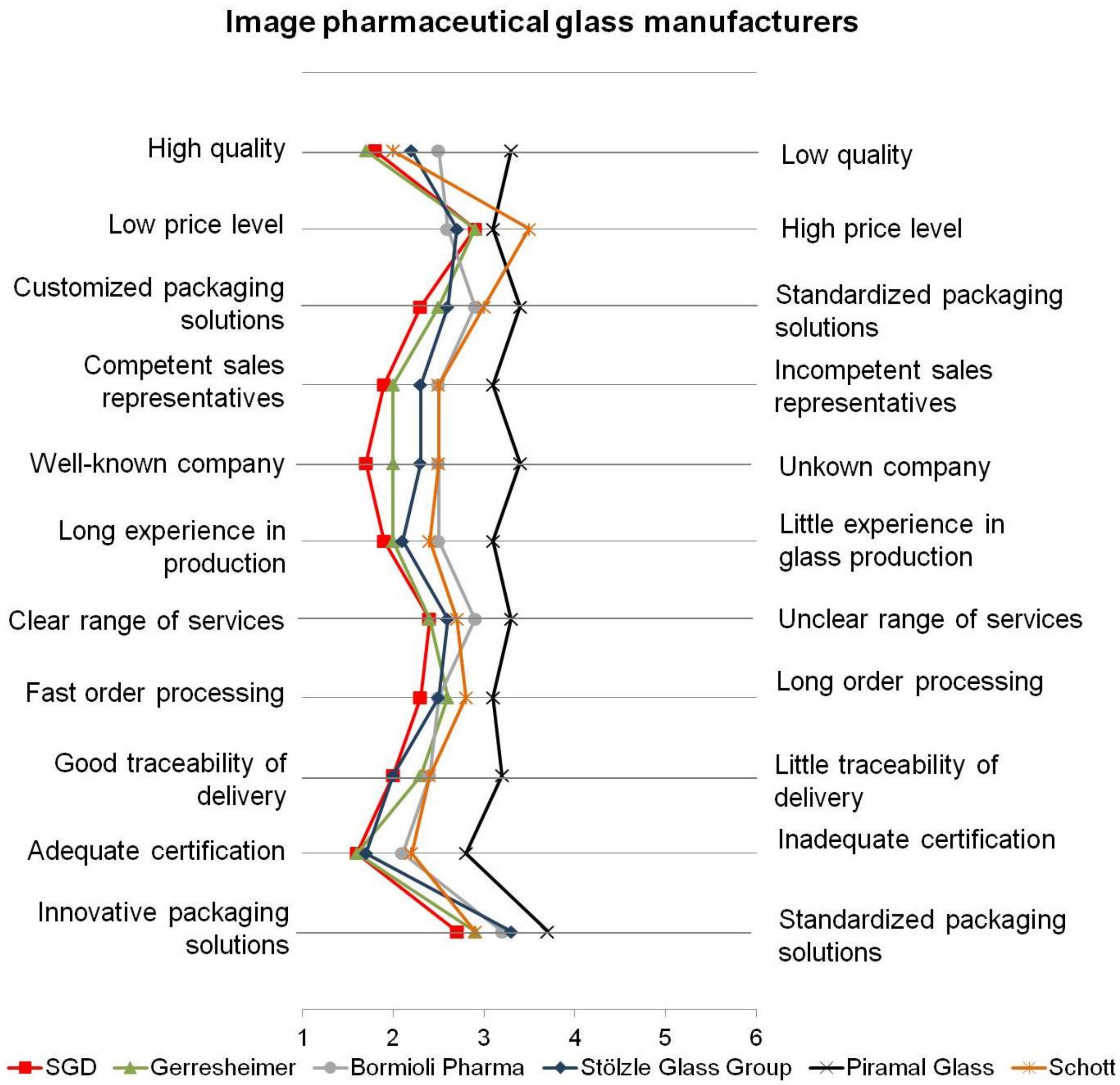


Figure 31: Importance of criteria for selecting pharmaceutical glass packaging (own presentation)

The most unimportant criteria is 'innovative packaging solutions'.

The following company profiles has been determined through contrasting pairs. The graph below shows the company profile of Stölzle in comparison to its competitors.



SGD n=53 Gerresheimer n=58 Bormioli n=52 Stölzle n=58 Piramal n=28 Schott n=35

Figure 32: Image profiles of pharmaceutical glass packaging suppliers (own presentation)

The line graph shows, that SGD Pharma is for many aspects perceived as the leader and thus has the overall best image.

The graph 33 shows the image profile of Stölzle split into existing and potential customers.

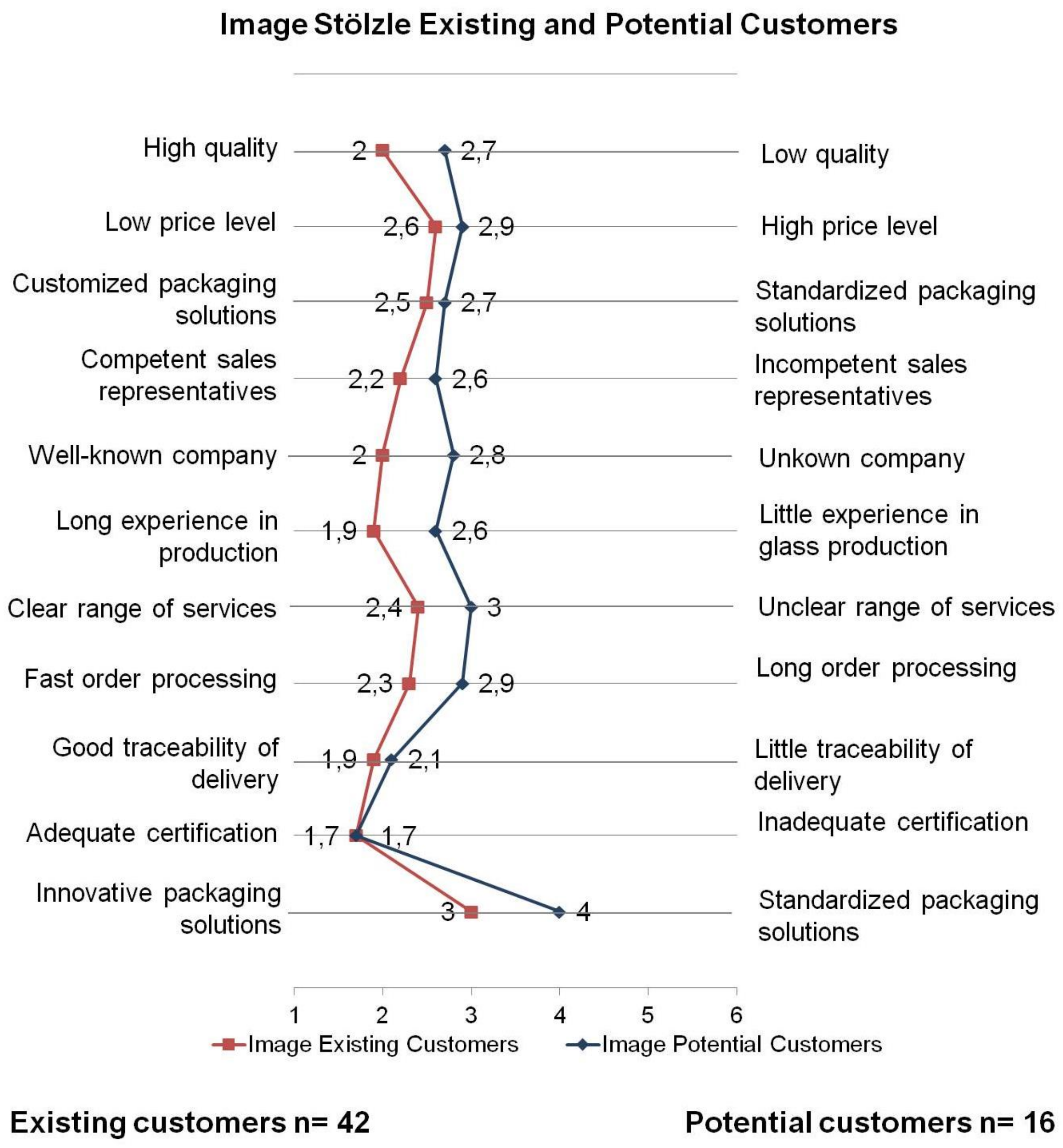


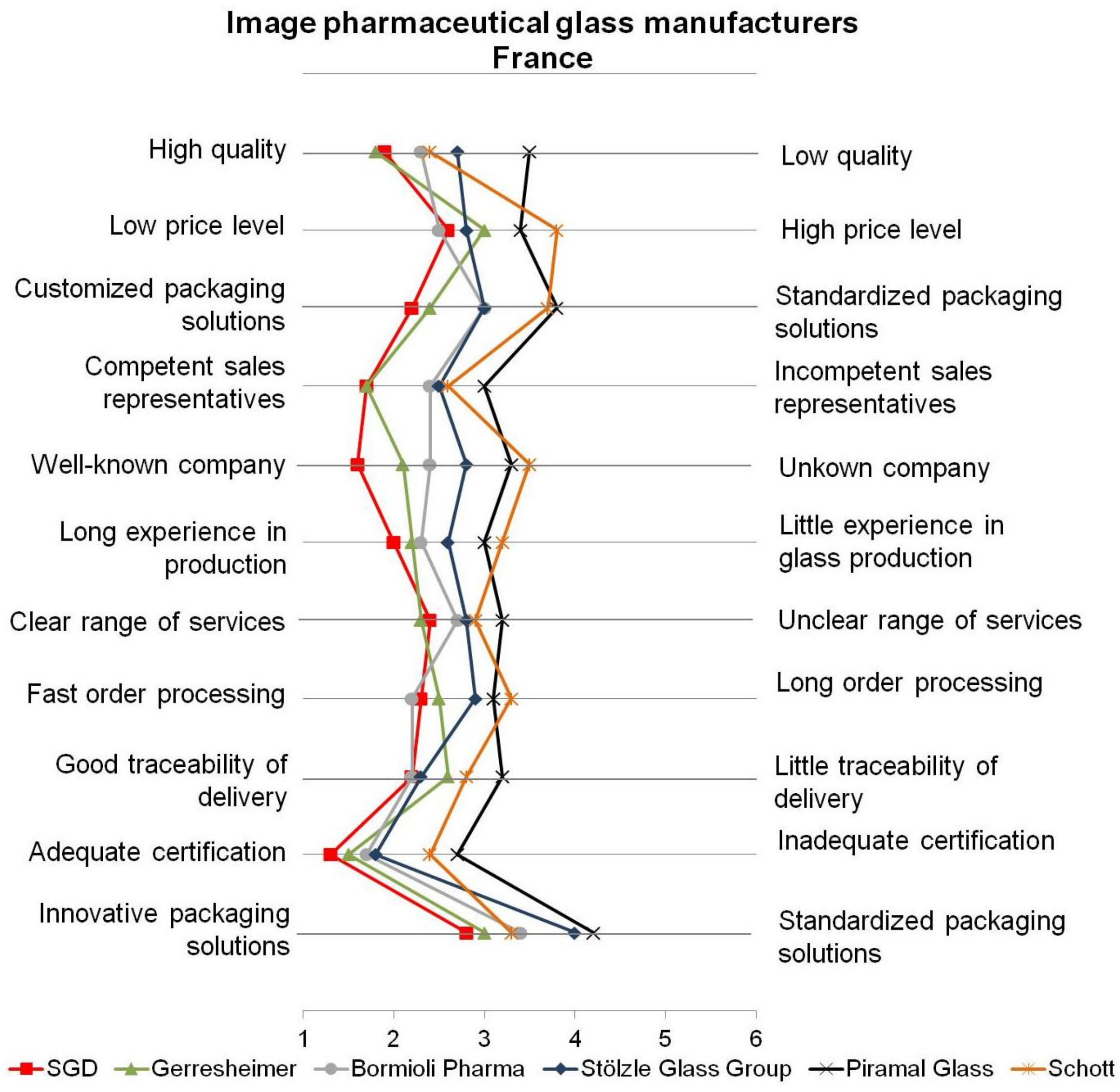
Figure 33: Image profile of Stölzle split into existing and potential customers (own presentation)

The graph illustrated that existing customers assess the image of Stölzle better than potential customers.

Main differences and specifics between France and Germany/Austria

In this section, the differences and specifics for the image between France and Germany/Austria is analyzed. The analysis includes image profiles of all competitors, a comparison of Stölzle's image in France and Germany/Austria and to SGD.

The graph below shows the image profiles of the main competition in the French pharmaceutical market.

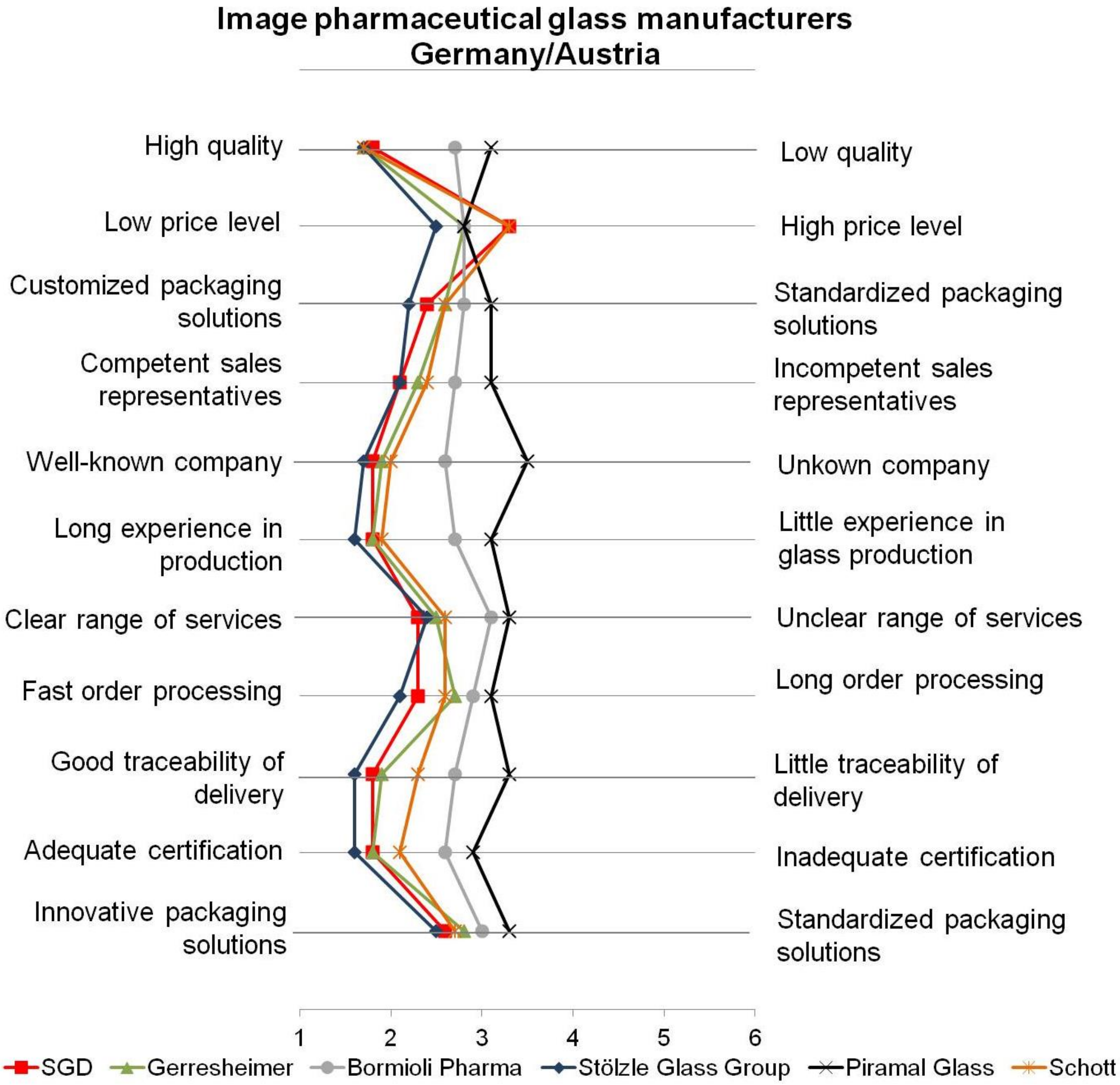


SGD n=30 Gerresheimer n=29 Bormioli n=28 Stölzle n=28 Piramal n=16 Schott n=8

Figure 34: Image profiles of STO and competitors – France (own presentation)

The line graph shows, that SGD Pharma is in many aspects perceived as the leader. Stölzle is in many aspects far behind SGD Pharma and for no single aspect perceived as the leader.

The graph below shows the image profiles of the main competition in the German/Austrian pharmaceutical market.

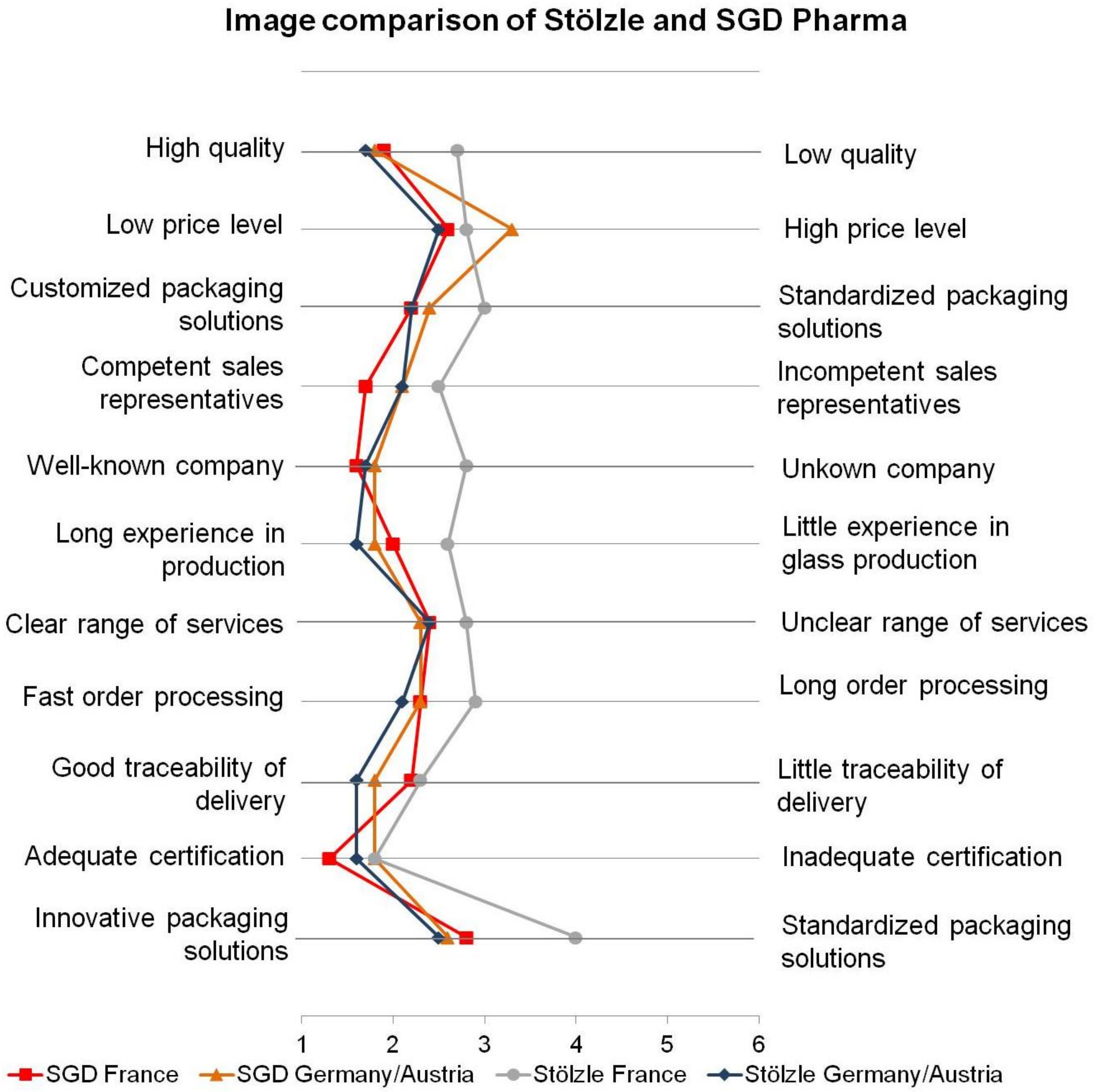


SGD n=23 Gerresheimer n=29 Bormioli n=24 Stölzle n=30 Piramal n=12 Schott n=27

Figure 35: Image profiles of STO and competitors – Germany/Austria (own presentation)

The line graph shows, that in the German/Austrian market Stölzle is in many aspects perceived as the leader.

The graph below shows the image profiles of Stölzle compared to the French market leader SGD Pharma in the French and German/Austrian pharmaceutical market.



SGD France n=30 SGD Germany/Austria n=23 Stölzle France n=28 Stölzle Germany/Austria n=30

Figure 36: Image of SGD Pharma and Stölzle in France and Germany/Austria (own presentation)

The line graph shows that Stölzle is perceived in many aspects more positively than SGD Pharma for the German/Austrian customers. But for the French customers, Stölzle is far behind SGD Pharma and for no aspect better assessed.

A significant difference was noticed for the image of Stölzle. Compared to Germany/Austria, Stölzle has an image gap in the French pharmaceutical market – as the graph below shows.

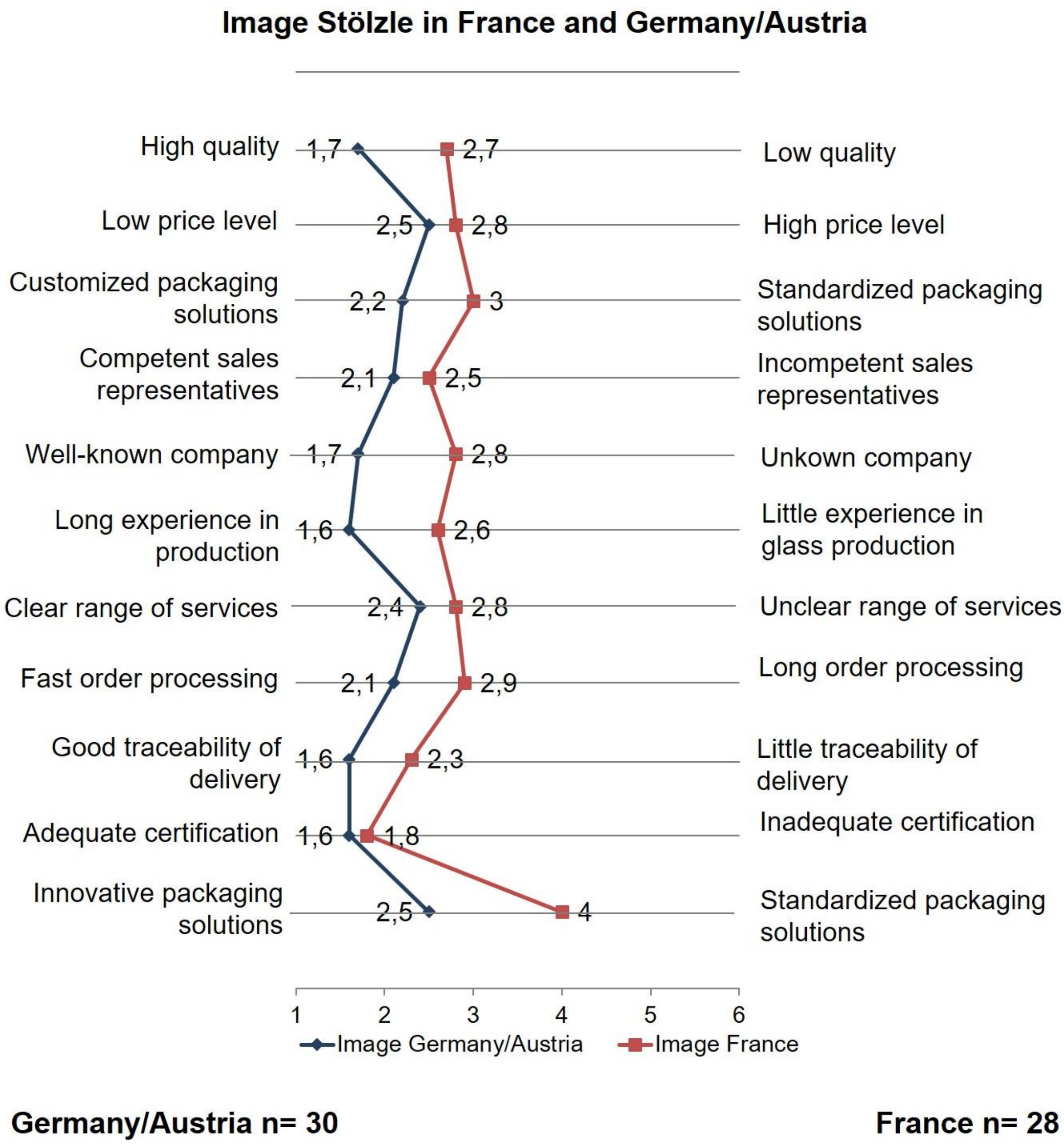


Figure 37: Image gap of Stölzle in the French pharmaceutical market (own presentation)

As can be seen in the line chart, the image of Stölzle in France is not as good as in the German/Austrian area. But all values are positive – except the last criteria 'Innovative packaging solutions'.

11.2.3 Marketing Communication and Information Search

As shown in figure 38, the preferred communication channels within the pharmaceutical industry are the company website, followed by the sales person and the trade fairs. As 'Others' the test persons named 'Recommendations from the industry'.

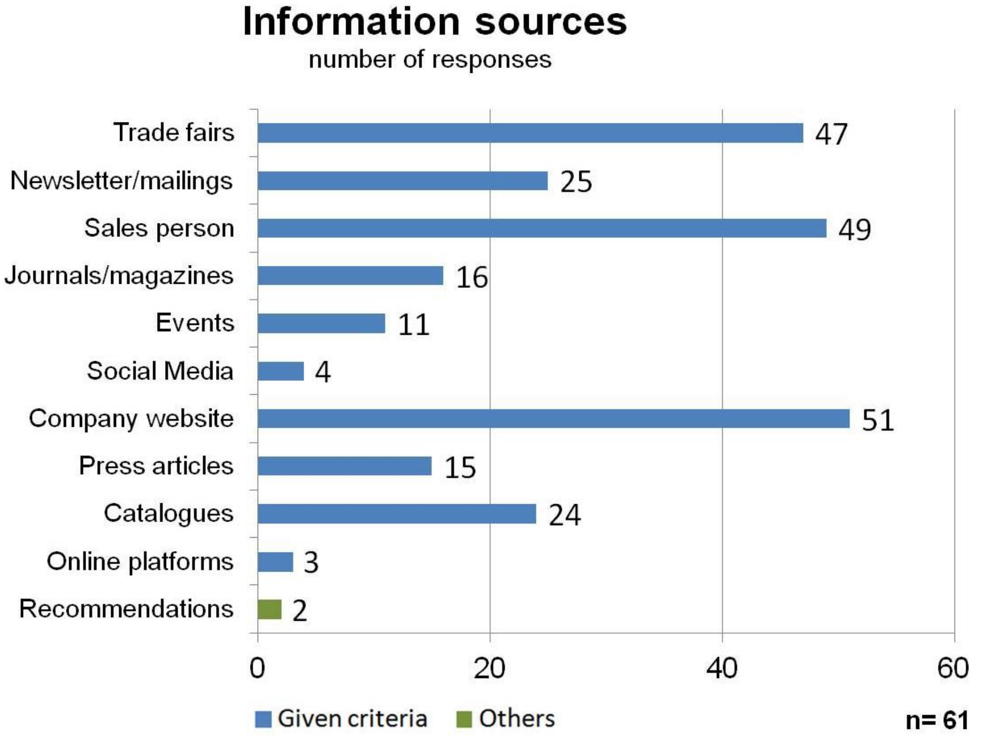


Figure 38: Information sources used within the pharmaceutical industry (own presentation)

The most used communication channels are also the most important ones: 'Company website', 'Sales person' and 'Trade fairs' – see figure 39 below.

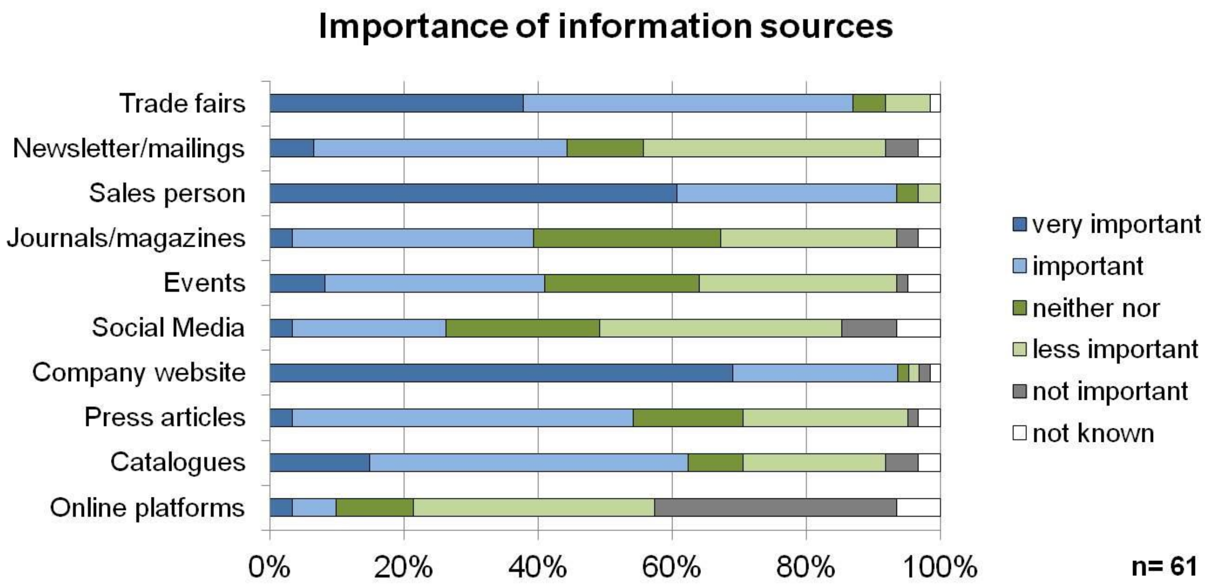


Figure 39: Importance of communication channels (own presentation)

Regarding credibility of the communication channels it turned out that, 'Trade fairs', 'Company website' and 'Sales person' are the most credible information sources.

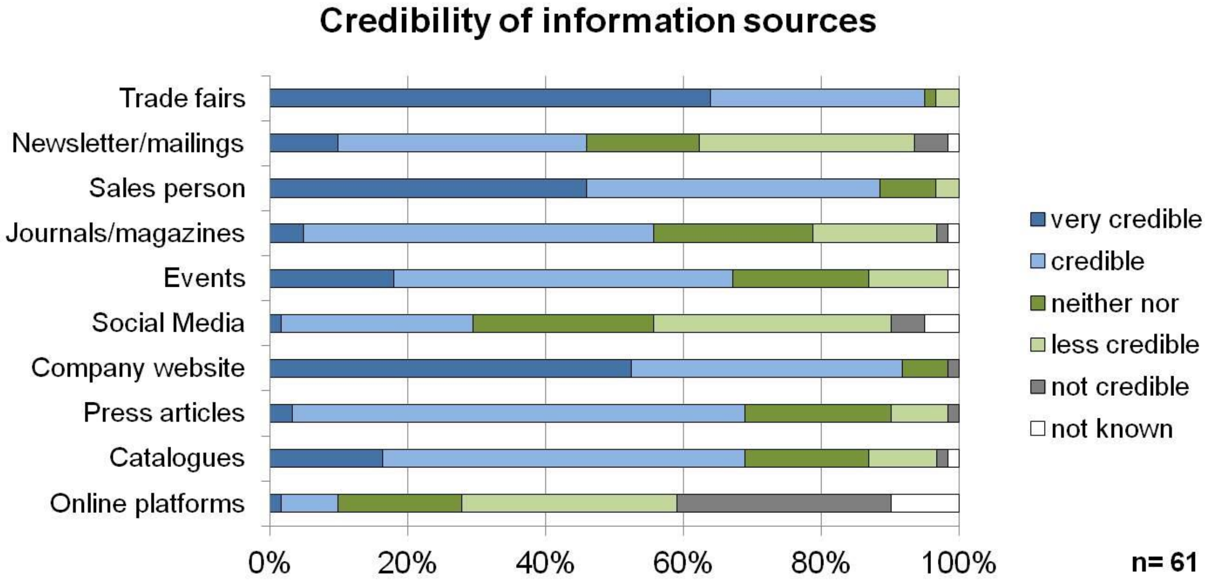


Figure 40: Credibility of communication channels (own presentation)

<u>Main differences and specifics between countries</u>

For the communication channels and information sources a few differences turned out. The French customers assessed the trade fairs more important than the German/Austria customers. In addition, the press articles are more important in France whereas the journals/magazines are less important.

Regarding the credibility of the communication channels, a difference was noticed for events. French customers assess 'Events' as more credible than German/Austrian customers.

11.2.4 Customer Demand and Decision Making Process

Overall, the highest demand exists for Type III glass packaging. In addition, nearly half of the surveyed companies uses Type I (29 companies) and Type II (27 companies) glass packaging. Figure 41 shows the distribution of demand for the different glass types.

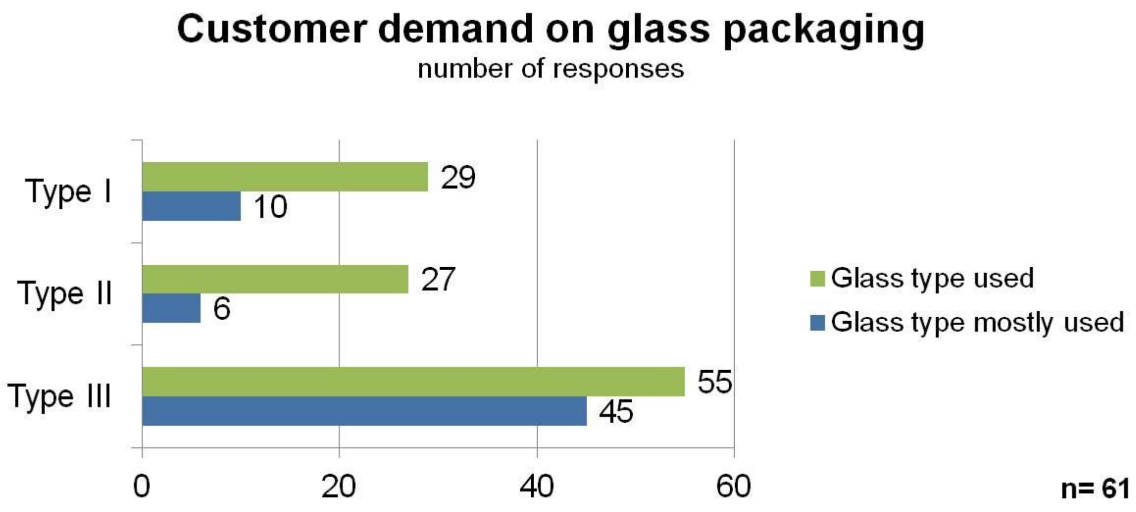


Figure 41: Demand for Type I, II and III glass packaging (own presentation)

The graph below shows a more detailed view on the demand for Type III glass packaging. It can be seen that 'Syrup bottles' and 'Dropper bottles' are most frequently used.

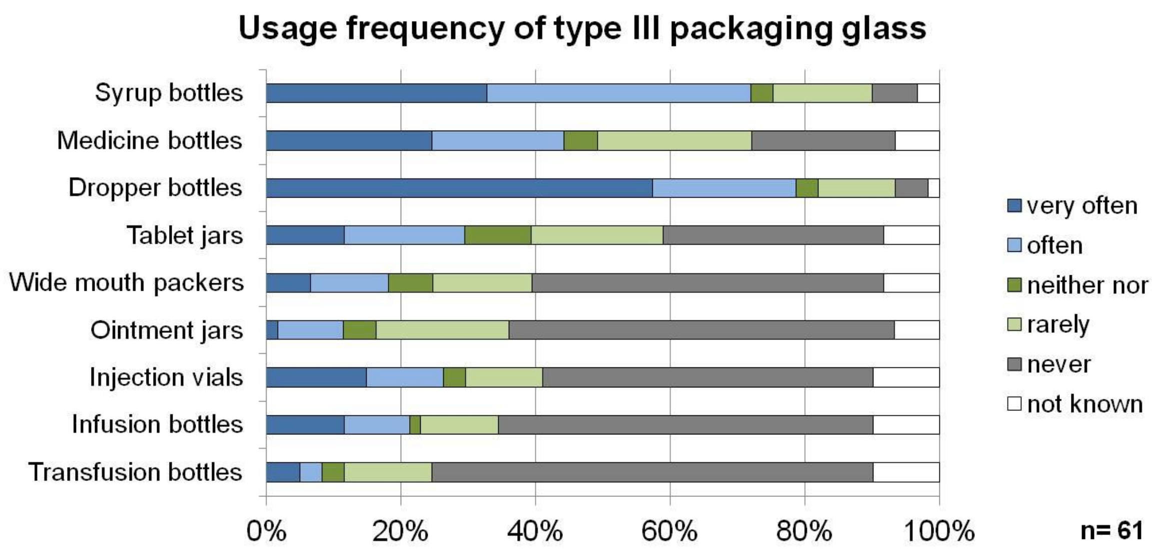


Figure 42: Demand for Type III glass packaging (own presentation)

When it comes to the parties involved in the buying process for pharmaceutical glass packaging, it is visible that especially the purchasing department is included.

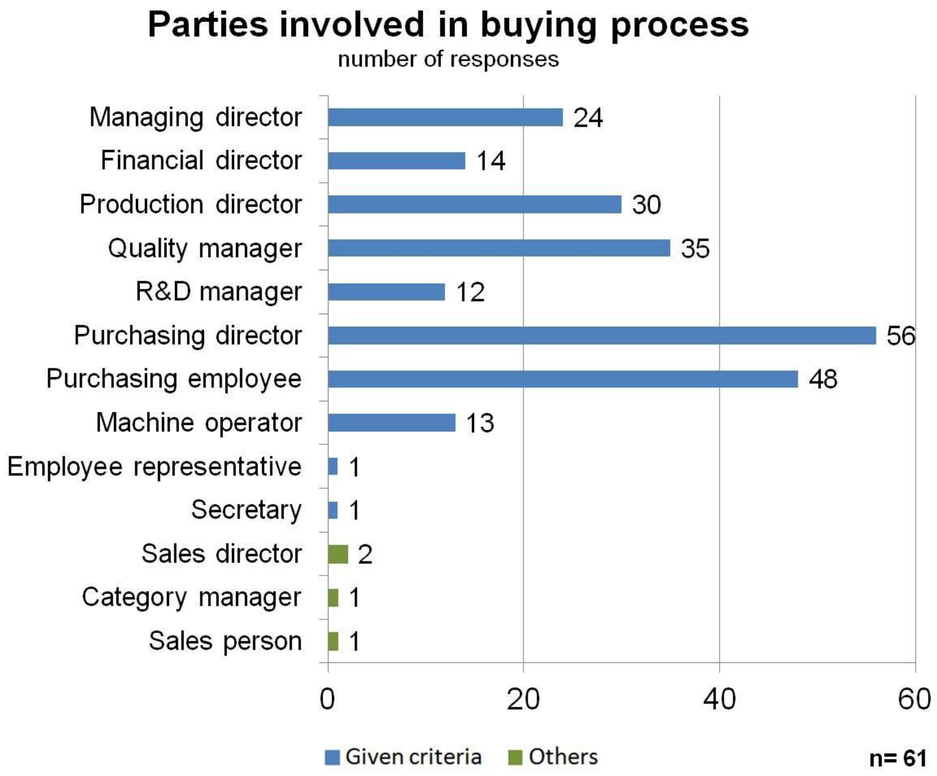


Figure 43: Parties involved in the buying process of glass packaging (own presentation)

In addition, the Quality manager and Production director take part in the decision making process. As 'Others' the test persons named the Sales director, Category manager as well as the Sales person.

For the section 'Customer Demand and Decision Making Process' no main difference was noticed between France and Germany/Austria.

11.2.5 Statistical Information

From 258 questionnaires, 61 questionnaires have been returned which is a return rate of 24%. Half of these 258 questionnaires have been sent to French customers and half to German/Austrian customers.

From the test persons, 30 work for a pharmaceutical company in France, 20 in Germany and 11 in Austria. The most participating companies (49%) employ more than 250 people, 33% between 50 and 250 people, 15% between 10 and 49 and only 3% up to 9 people. Regarding the job position it turned out that the most test persons are working in the purchasing department – either as purchasing director or purchasing employee. From the 61 test persons, 42 have already bought at Stölzle and 19 are potential customers.

Additional interpretations of the primary market research results can be found in the appendix – starting on page A-45.

11.3 Conclusion: Primary Market Research

From 258 questionnaires, 61 have been returned by the medicine manufacturers. From these 61, 49% have been returned from France, 33% from Germany and 18% from Austria.

Awareness level

For the unaided brand awareness, Gerresheimer is the most well known, followed by SGD Pharma and Stölzle. For the aided brand awareness Gerresheimer and Stölzle are on the same awareness level, followed by SGD Pharma. Gerresheimer is rated as the preferred supplier, as the company is the most considered and selected one for pharmaceutical glass packaging. In France, SGD Pharma is the most well-known company unaided as well as aided. In Germany/Austria Stölzle is the most well-known company unaided as well as aided. In France SGD Pharma is the most considered and selected supplier for pharmaceutical glass packaging, in Germany/Austria Stölzle and Gerresheimer are the preferred suppliers.
Main differences for Stölzle have been found between the French and the German/Austrian market. The unaided brand awareness in Germany/Austria is for 40% higher than in France. In addition, Stölzle is much more often considered and selected as a pharmaceutical glass packaging supplier in Germany/Austria than in France.

Image

The most important criteria for a first purchase as well as repurchase are the criteria 'competent sales representatives', 'fast order processing' followed by 'good traceability of delivery'. For selecting pharmaceutical glass packaging, 'high quality' and 'adequate certification' are the two most important criteria.
The image of the glass packaging manufacturers show very similar characteristic for the given criteria – except Piramal Glass. The best overall image has SGD Pharma. In France, Stölzle is for no aspect of the image analysis perceived as the

leader. In France, SGD Pharma has the best image with some leader positions. In Germany/Austria, Stölzle is perceived as the leader for many image aspects.
One significant difference between France and Germany/Austria was found in the image of Stölzle. The results show that there is a significant image gap of Stölzle in the French pharmaceutical market.

Information and communication sources

The most important information channels for pharmaceutical customers are the company website, the sales person as well as trade fairs. These channels are also the most important as well as most credible ones for the test persons. French customers evaluated the trade fairs and press articles as much more important than German/Austrian customers.

Customer demand and buying process

The highest demand for pharmaceutical glass containers exists for Type III glass. Especially syrup and dropper bottles are highly requested by the pharmaceutical manufacturers. Regarding the decision making process for pharmaceutical glass packaging, especially the purchasing department – purchasing director and employee – is involved. Additionally, the Quality manager as well as production director take part in the decision making.

12 Implication

Since France is one of the biggest pharmaceutical markets worldwide with a market volume of € 54 billion for medicines, the French market provides high potential for Stölzle in the upcoming years.

Stölzle has a different initial situation for its positioning in France and Germany/Austria. The reasons are that Stölzle faces a significant image gap in the French pharmaceutical market and the company has no leader position in the customers' perception for any image characteristic in France. Additionally, SGD Pharma dominates the French pharmaceutical market and defends its home market. Another problem is that Stölzle is well-known in France but faces a relatively bad image compared to competition. Stölzle has an aided brand awareness of 93% in France but the company is only considered by 53% of the test persons. Thus, it is important for Stölzle to develop a unique positioning to improve the image.

In the pharmaceutical glass packaging industry differentiation through quality, distribution or price can be hardly reached. The graph below shows the current image area of pharmaceutical glass packaging suppliers in France – positioned with quality and price. The size of the circles demonstrates the company sizes.

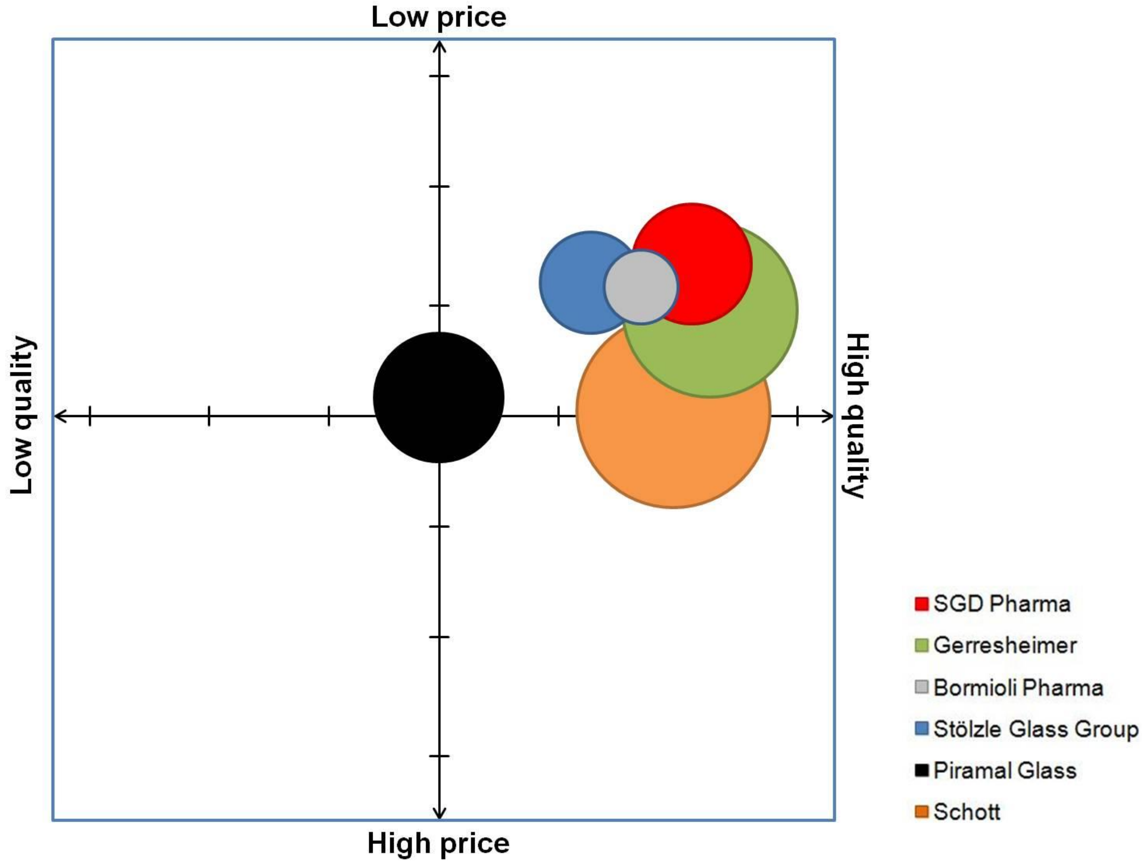


Figure 44: Actual positioning on the basis of quality and price (own presentation)

As the graph shows, the main competitors of Stölzle are all closely positioned in the upper right section. Therefore, a differentiation through quality or price is very difficult to achieve.

Compared to the French market leader SGD Pharma, no real strength was identified in the case of Stölzle. In addition, the image gap is too big between Stölzle and SGD Pharma, which means that a pure reactive positioning would be insufficient. Thus, it is important for Stölzle to find a position which differentiates its brand from competition in the French pharmaceutical market to reach its growth target. In order to achieve this, a new positioning attribute needs to be occupied.

13 Positioning Concept for Stölzle Glass Group

Based on the findings of the internal and external analysis, chapter 13 describes the practical implementation of the brand positioning concept for Stölzle Glass Group in the French pharmaceutical market. Depending on the strategy selection, the positioning will be either reactive or active.

13.1 Brand Identity as Prerequisite

Prior to developing the brand positioning for Stölzle, the brand identity of the BU Pharma has to be analysed.

Stölzle has a product-oriented appearance, as the company describes its glass packaging as an integrated part of the final medicine. In addition, the company states that the glass containers help the customer to differentiate its medicine from competition. In the following figure, the brand identity of Stölzle is described.

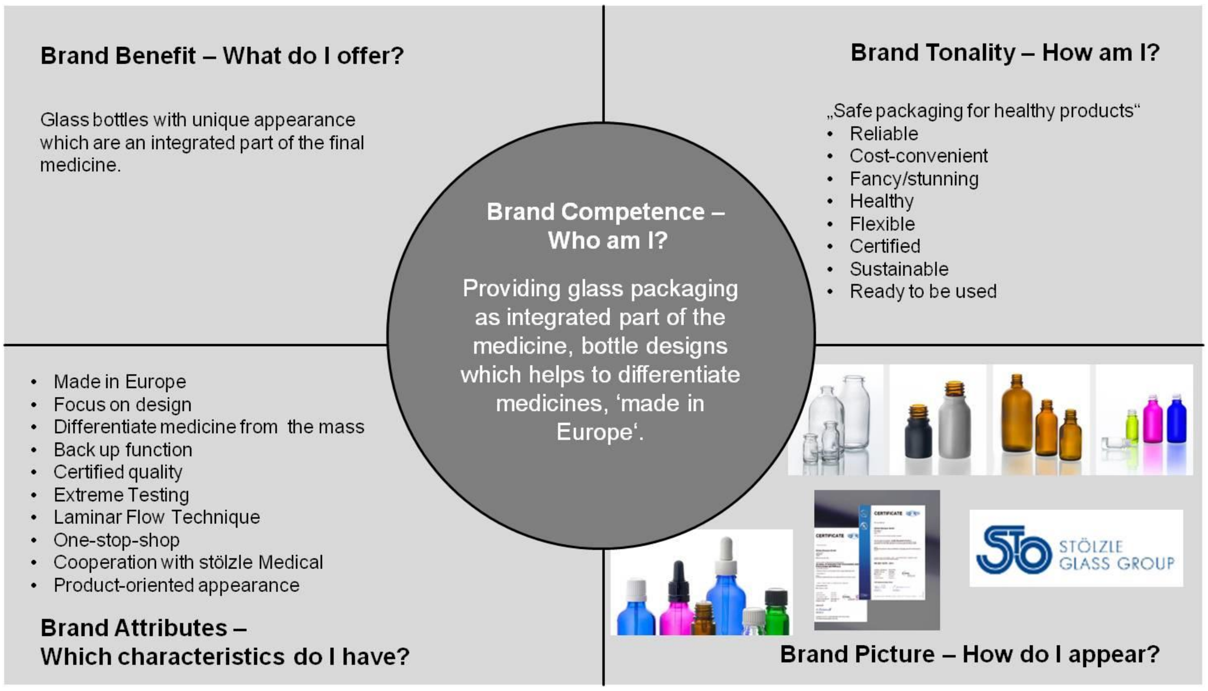


Figure 45: Brand Identity of Stölzle (own presentation based on Stölzle Glass Group 2017a; Esch 2018)

On the website, Stölzle has a product-oriented appearance putting the certified quality and design into focus. The pictures are showing the available bottles in different colors, shapes, with or without closures. Also the slogan "Safe packaging for healthy products" focuses mainly on the packaging itself and not on the benefit for the customer or patient.

13.2 Brand Positioning Aim

Since Stölzle faces a significant image gap in the French pharmaceutical market for all image aspects compared to the market leader SGD Pharma, it is necessary to differentiate through one specific attribute or to occupy a new one.

The objective of the brand positioning is to achieve a mental leading position for one image characteristic in order to differentiate from the competition and reach the growth and brand awareness target.

A sub goal is to close the image gap in the French pharmaceutical market. To achieve the main objective it is requested for Stölzle to identify one specific differentiation factor. The brand positioning is based on this differentiation attribute to create a consistent image in the target group's mind. Consequently, the overall image gap in France will be closed by the halo-effect over time.

13.3 Brand Positioning Strategy

The brand positioning concept for Stölzle will be based on one strategy of the Marketing Warefare approach. This approach provides 4 different strategies as shown in figure 46.

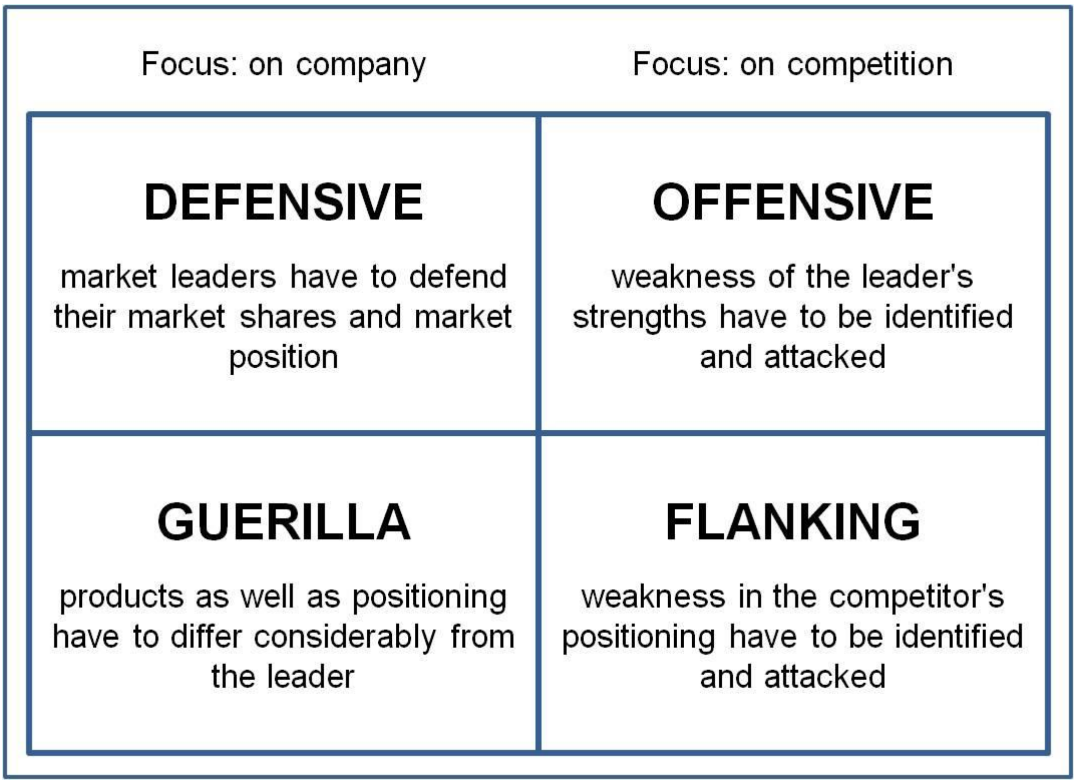


Figure 46: Overview of Marketing Warefare strategy approaches (based on Ries/Trout 1997, p. 6)

The actual market situation offers three different strategies for Stölzle. The defensive strategy is excluded, since SGD Pharma is the market leader in the French pharmaceutical glass packaging market. Through an **offensive strategy**, Stölzle acts as a market challenger and attacks SGD Pharma in its home market France. By pursuing a **flanking strategy**, Stölzle has to find a weakness in the competitor's positioning. This could be in the French pharmaceutical market the image attribute 'Innovative packaging solutions' as the competition is relatively bad perceived for this attribute. Finally, also a **guerilla strategy** is possible. Within a guerilla strategy, Stölzle positions itself in a niche for Type III glass packaging.

The positioning aim of Stölzle is to reach a mental leading position for one image characteristic in the French pharmaceutical market. Since three strategy approaches are suitable, the selection of the appropriate strategy depends on the profile and positioning requirements as well as positioning ideas, which are defined in the next chapter.

13.4 Brand Positioning Ideas

The development of brand positioning ideas requires to clearly define the positioning requirements in the first stage. Based on these requirements, the concrete positioning ideas will be developed and afterwards evaluated and selected through a value-benefit-analysis.

13.4.1 Profile and Positioning Requirements

For developing a successful brand positioning for Stölzle in the French pharmaceutical market, it is requested to fulfill certain positioning requirements. These requirements are identified in the findings of the theoretical section, in the conducted market research as well as in provisions and limits set by Stölzle.

For Stölzle seven positioning requirements are defined - shown in figure 47:

7 POSITIONING REQUIREMENTS FOR STÖLZLE

Differentiation from competition

As pharmaceutical glass containers are very similar, it is important for Stölzle to set up an extraordinary brand positioning. Thereby a position in the customers' mind has to be occupied which is different from that of the competition, unique and easily retrievable.

Quality

For the customers especially quality is a crucial factor when selecting and buying pharmaceutical glass packaging. Thus, the positioning content has to transfer the quality of the brand.

Simplicity

The positioning idea has to be communicated in a simple and understandable way to the target group. Therefore, the key message of the brand has to be reduced to a minimum – maybe one single word – and communicated again and again.

Potential for repositioning competition

By positioning the brand of Stölzle, potential for repositioning the competition has to be ensured. Thus, Stölzle occupies a very strong position for one attribute and devaluates the position of the competitors.

Durability

The brand positioning has to be implementable long-term and communicated again and again till the content is accepted by the customers. Thus, the positioning needs to be future-oriented and flexible in order to adapt the positioning to short-term changes in the market environment.

Product benefit

The positioning should connect the customers' emotions to the glass packaging. Thereby the glass bottles provided by Stölzle should be portrayed as more valuable compared to the competition. This will strengthen the customers' willingness to buy the glass packaging.

Image adjustment

The positioning of Stölzle in France must be consistent with the company's image in the business unit Pharma. Otherwise, the positioning could be perceived and evaluated by the customers as incompetent and unreliable. This could dilute the current international image of the Pharma brand. Therefore, it is recommended to not make radical changes on the current image – just slightly adaption is suggested.

Figure 47: 7 positioning requirements for Stölzle Glass Group (own presentation)

The positioning requirements have to be fulfilled by the positioning ideas which are developed in the next chapter.

13.4.2 Brand Positioning Alternatives

Based on the results of the internal and external analysis, the brand positioning alternatives are developed. Trout's Differentiate or Die approach is used to identify possible differentiation potential from competition in the French pharmaceutical market. 3 out of 14 differentiation options are considered to be suitable for fulfilling the positioning goal of Stölzle. In addition, also the Lead Product approach from Brandtner is taken into account.

Even if differentiation through quality can be hardly achieved, it is an important criteria for selecting pharmaceutical packaging glass. Thus, the positioning ideas are based on other image attributes than quality to guarantee differentiation from competition. Nevertheless, the positioning idea must have a positive influence on the customer's quality perception.

<u>Alternative 1 (offensive strategy approach)</u>

Stölzle is the most well-experienced pharmaceutical glass packaging supplier

The first positioning alternative is build up on Trout's differentiation approach 'Heritage'. Thereby the positioning is based on the brand tradition of the business unit Pharma. Since Stölzle produces glass packaging for more than 200 years, the positioning can be based on long experience in glass production and security for the target group. In addition, also the customer's perception on quality can be positively influenced, as long experience indicates a higher quality level which has developed and improved over time.

In the secondary market research it turned out that Stölzle has the longest experience in glass production, since the company was established in 1805. Compared to that, Bormioli was established in 1825, Gerresheimer in 1864, SGD in 1896 and Piramal Glass in 1984. In the primary market research it was found out that in Germany/Austria Stölzle has the best assessment for 'Long experience in production'. Conversely, in France SGD Pharma, Gerresheimer and Bormioli Pharma are perceived as having a longer experience than Stölzle. Nevertheless, this focus on brand tradition and long experience in producing glass could be used to convey security to the target group and win their trust.

Alternative 2 (guerilla strategy approach)

Stölzle is the specialist for pharmaceutical Type III packaging glass

The second positioning alternative is build up on Trout's differentiation approach 'Market Specialist'. Stölzle could position itself as a specialist in the field of Type III glass packaging. On this way, Stölzle differentiates itself from the generalists and is perceived as being an expert in this certain product area by the target group. In addition, the quality perception will improve, as being the specialist indicates a high level of quality.

In the secondary market research it turned out that Stölzle is the only glass packaging manufacturer which does not offer Type I and II glass. Thus, Stölzle only provides Type III container glass. This fact builds the base for positioning the brand as being the specialist who allocates all its resources on this single market sector. In addition, the demand for Type III glass packaging is much higher than for Type I and II. Thus, a brand positioning with specialization on Type III glass packaging has high market potential for Stölzle and perfectly fits to the company's global image.

Alternative 3 (offensive strategy approach)

Stölzle is preferred supplier for pharmaceutical Type III packaging glass

The third positioning alternative is build up on Trout's differentiation approach 'Preference'. For this kind of brand positioning, being the first choice in a certain segment is pursued. Stölzle could position itself as being the first choice for Type III pharmaceutical glass packaging, since the company is specialized on Type III glass containers.

In order to show evidence, Stölzle could substantiate its statement through customer and opinion leaders' statements in the industry. This positioning alternative would indicate, that Stölzle is a preferred supplier for pharmaceutical Type III packaging glass, while competition is repositioned as being not the preferred supplier. This positioning idea is easy to implement and increases the perceived product benefit through customer recommendations.

Alternative 4 (flanking strategy approach)

Stölzle is the next generation for pharmaceutical packaging glass

The fourth positioning alternative is build up on Brandtner's differentiation approach 'Lead Product'. The wording 'next generation' indicates future orientation and derive from Trout and Brandtner. In the case of Stölzle, the UV print on pharmaceutical glass containers could be used as a lead product, which will be introduced to the market as a new standard. The UV print has many advantages for the customer as well as Stölzle. On the one hand, the customer can be sure to purchase glass containers fulfilling the quality standards for the pharmaceutical industry and are not counterfeited. On the other hand, if there is any problem with the delivery regarding quality, Stölzle can easily trace back when the container was produced, on which production line at which exact time. This data supports the company in improving their quality and processes.

Through a lead product, Stölzle differentiates itself through an innovation on the French pharmaceutical market and refreshes the brand. Thereby, the image for the attribute 'Innovative packaging solutions' will be improved and the halo-effect will have a positive influence on the other image values. Consequently, the positioning through an innovation will close the image in the French market over time.

13.4.3 Evaluation and Selection of Brand Positioning

In order to select the most suitable and successful positioning alternative, a value benefit analysis is conducted. The objective is to select the positioning idea which fulfils the positioning requirements in the best way. The evaluation of the brand positioning alternatives was carried out separately within the Marketing and Sales department. Thus, the analysis was done in cooperation with:

- Head of Marketing department
- Marketing Project Manager
- Head of BU Pharma & Medical
- Area Sales Manager Pharma in France
- Area Sales Manager Pharma in Germany Austria

First, the positioning requirements were weighted by a pair comparison in order to determine the relevance of each factor. Since Marketing and Sales have different priorities and requirements to be met by the positioning, two different weightings of the positioning requirements have been developed. In addition, the evaluation of the four alternatives regarding their fulfillment of the positioning requirements was carried out. For each positioning requirement, ratings from 1 (not fulfilled) to 5 (completely fulfilled) have been made. The pair comparison as well as the ranking of each positioning alternative including the justification can be found in the appendix on page A-54 to A-56.

Finally, the overall assessment for each positioning alternative shows the most suitable positioning idea for Stölzle. The two graphs below illustrates the outcome of the value benefit analysis for Marketing and Sales.

VALUE BENEFIT ANALYSIS - Marketing

		Alternative 1		Alternative 2		Alternative 3		Alternative 4	
Positioning requirements	Weight Marketing	Ranking	Ranking x Weight M	Ranking	Ranking x Weight M	Ranking	Ranking x Weight M	Ranking	Ranking x Weight M
Differentiation from competition	18,1	3	54,3	4	72,4	4	72,4	5	90,5
Quality	14,8	3	44,4	4	59,2	3	44,4	5	74,0
Simplicity	15,7	4	62,8	3	47,1	5	78,5	4	62,8
Repositioning of competition	10,5	3	31,5	4	42,0	4	42,0	5	52,5
Durability	13,8	5	69,0	4	55,2	3	41,4	3	41,4
Product benefit	11,0	2	22,0	3	33,0	5	55,0	5	55,0
Image adjustment	16,2	4	64,8	5	81,0	4	64,8	3	48,6
		SUM	**348,8**	**SUM**	**389,9**	**SUM**	**398,5**	**SUM**	**424,8**
		Ranking Position	**4**		**3**		**2**		**1**

Ranking (R)
5 = completely fulfilled
1 = not fulfilled

Weight Marketing
(Weight M)
Sum = 100

Alternatives (A):
A 1: Stölzle is the most well-experienced pharmaceutical glass packaging supplier
A 2: Stölzle is the specialist for pharmaceutical Type III packaging glass
A 3: Stölzle is preferred supplier for pharmaceutical Type III packaging glass
A 4: Stölzle is the next generation for pharmaceutical packaging glass

Figure 48: Value benefit analysis – Marketing (own presentation)

As shown in figure 48, Marketing assessed Alternative 4 as most appropriate.

VALUE BENEFIT ANALYSIS - Sales

		Alternative 1		Alternative 2		Alternative 3		Alternative 4	
Positioning requirements	Weight Sales	Ranking	Ranking x Weight S	Ranking	Ranking x Weight S	Ranking	Ranking x Weight S	Ranking	Ranking x Weight S
Differentiation from competition	15,7	3	47,1	4	62,8	4	62,8	5	78,5
Quality	20,5	3	61,5	4	82,0	3	61,5	5	102,5
Simplicity	12,4	4	49,6	3	37,2	5	62,0	4	49,6
Repositioning of competition	9,5	3	28,5	4	38,0	4	38,0	5	47,5
Durability	13,3	5	66,5	4	53,2	3	39,9	3	39,9
Product benefit	7,6	2	15,2	3	22,8	5	38,0	5	38,0
Image adjustment	21	4	84,0	5	105,0	4	84,0	3	63,0
		SUM	**352,4**	**SUM**	**401,0**	**SUM**	**386,2**	**SUM**	**419,0**
		Ranking Position	**4**		**2**		**3**		**1**

Ranking
5 = completely fulfilled
1 = not fulfilled

Weight Sales
(Weight S)
Sum = 100

Alternatives (A):
A 1: Stölzle is the most well-experienced pharmaceutical glass packaging supplier
A 2: Stölzle is the specialist for pharmaceutical Type III packaging glass
A 3: Stölzle is preferred supplier for pharmaceutical Type III packaging glass
A 4: Stölzle is the next generation for pharmaceutical packaging glass

Figure 49: Value benefit analysis – Sales (own presentation)

In figure 49 it can be seen that also Sales evaluated Alternative 4 as being the most suitable positioning idea for Stölzle.

13.4.4 Recommendations

For Stölzle it is recommended to implement positioning alternative 4 "Stölzle is the next generation for pharmaceutical packaging glass". The idea is based on an active positioning model which especially addresses latent customer needs.

The focus of this positioning idea is to occupy a market position which differs from competition by strongly communicating the innovation of the UV print. Since the image in France is relatively bad compared to SGD Pharma and the image gap is very huge, focusing on one specific attribute is advisable. After some time, Stölzle will not only improve its image regarding innovation, the halo-effect will steadily improve the overall image and close the image in France.

The positioning alternative 4 provides huge potential for Stölzle in the French pharmaceutical market. Not only by differentiating from competition, but also for repositioning the competitor's brands as being relatively rigid and not future-oriented. In addition, the positioning idea has a positive impact on the customer's perception for quality. Moreover, the positioning alternative matches very well with the current 'product-oriented' positioning.

But at this point it has to be noticed that positioning alternative 4 is granted for a limited period of time. For that reason, the positioning idea 4 is a good start for a soft and progressive repositioning of Stölzle's Pharma brand. However, after using alternative 4 for the repositioning, a different positioning idea has to be selected for the long run. It is recommended to either implement positioning alternative 2 or 3 since those alternatives have been assessed as being the second most suitable positioning idea by Marketing and Sales. To make a rational decision on the subsequent positioning idea, it is advisable to carry out a detailed analysis after one year implementation of alternative 4.

In the next chapter, recommendations for communicating the selected positioning idea 4 are presented.

14 Recommendations for IMC

This chapter deals with the practical implementation of the selected brand positioning idea for Stölzle in the French pharmaceutical market.

14.1 Communication Goal

The communication objectives are divided into main and sub goals.

The main communication objective is to position Stölzle as a pioneer for pharmaceutical Type III glass packaging in order to raise the unaided brand awareness of Stölzle in the French pharmaceutical market and to be more often considered as pharmaceutical glass packaging supplier. By achieving that, the company's targets on revenue growth and improvement of brand awareness will be reached.

The sub goals are:

- to introduce the UV print as a new standard
- to reach a mental leading position for 'innovative packaging solutions'
- to differentiate the communication messages from competition

14.2 Communication Strategy

The communication strategy is to introduce step by step the UV print as an innovative pharmaceutical glass packaging standard. This step by step procedure will build up and maintain the tension during the product introduction to the market.

The brand development is divided into 3 phases which consists of different communication activities:

- Pre-sales stage
- Introduction phase
- Growth phase (cf. Brandtner/Kilian 2010, p. 103f.)

In the pre-sales stage, the product and brand introduction needs to be celebrated by focused announcements. These announcements have to be very promising by not revealing too many details. Thereby, momentum is reached which keeps the tension and speculations high for the customers. In the introduction phase, the product needs to be physically presented to the target group at trade shows or customer visits, supported through promotional materials. In the growth phase, the sales team has to keep the customers in touch with UV print.

The exact measures within the 3 phases, are described in the next section 14.3.1.

14.3 Integrated Marketing Communication

In this chapter, the integrated marketing communication for Stölzle is developed including the communication activities, the integration of content, formality and timing and the budget.

14.3.1 Communication Activities

First of all, the suggested communication activities for 2019 are shortly introduced in the figure below.

COMMUNICATION ACTIVITIES FOR STÖLZLE

Personal selling

- Personal customer contact is the most important communication measure in France
- Sales representatives promote Stölzle as innovative pharmaceutical glass packaging supplier
- Marketing provides regular trainings and promotional materials for customer visits
- Promotional materials: UV print information sheets and Rework of Pharma catalogue including UV print

Company website

- Second most important information source for French pharmaceutical customers
- Communication of the core elements of the new positioning and newst information of UV print online
- Installation of a newsletter registration

Exhibitions & Congresses

- The third most important communication channel are exhibitions
- Recommended shows for 2019: Pharmapack Europe I CPhI Worldwide I European Pharma Congress I Pharma Science Research & Development
- Great opportunity to announce more details about the UV print

Press articles in journals and magazines

- Press articles in international journals are an important complementary communication channel
- Publications in journals and magazines are helpful to create tension at the target group
- Recommended journals: Journal of Pharmacy and Pharmaceutical Sciences I European Pharmaceutical Review I Pharmatimes I Healthcare Packaging I Packaging News

Direct mailing and sales promotion

- Useful for announcing the participation at trade shows, congresses and invite customers
- Information for the UV print should be send out quarterly to keep customers in touch with the topic

Figure 50: Communication activities for Stölzle in 2019 (own presentation)

A more detailed description of the communication activities can be found in the appendix on page A-57 and A-58.

To coordinate communication activities successfully, several principles regarding content, formality and timing must be observed – which are defined below.

14.3.2 Content-related Integration

To guarantee content integration, a thematic coordination of all communication instruments and personal selling is necessary. For Stölzle, the content has to include the core elements of the positioning idea:

- Stölzle is a pioneer for Type III glass packaging
- Stölzle offers new standard with UV print
- Stölzle stands for innovative packaging solutions
- Stölzle provides superior quality
- Stölzle offers special product benefit through easy traceability
- Stölzle cares for the customers future needs

<u>Slogan</u>

It is recommended to keep the slogan 'Safe packaging for healthy products' for the new positioning. The reasons are that this slogan is used for the BU Pharma worldwide and the positioning through the UV print innovation is granted for a limited period of time. Thus, changing the slogan would hamper the global image and reduce consistency in Stölzle's appearance.

14.3.3 Formal Integration

To ensure formal integration, several design principles have to be fulfilled which are defined in Stölzle's CD guideline. These principles supports the customers in allocating the brand to Stölzle.

The design principles are:

- use of company logo 'Stölzle Glass Group' as brand logo
- combine the company's blue color (RGB: 0 r | 72 g | 142b) with the mint green color of BU pharma (RGB: 154r | 191 g | 170 b)
- company name, slogan and headings written in lettering 'Futura Light' or 'Futura Medium' – text messages in 'Arial'
- size of lettering depends on space available
- use of key image which shows the whole range of Stölzle's standards in different colors, decoration techniques and sizes with closures
- use of image showing the UV print as a standard

14.3.4 Temporal Integration

To achieve a temporal integration of all communication activities, it is requested to coordinate the timing between different communication instruments and within a communication instrument. For this purpose a yearly communication plan for 2019 for the French pharmaceutical market is developed for Stölzle. This plan includes fixed communication activities like trade shows and timely independent activities.

<u>Development of the communication timeline</u>

The activities are categorized into the pre-sales, introduction and growth phase of the UV print standard. In the pre-sales phase, tension is build up from January to September by steadily spreading information of the UV print to the target group. At the beginning, the core elements of the positioning are integrated on the website of Stölzle and the newsletter registration is set up. Simultaneously, the invitation for the exhibition and the first UV print information sheet is created to be prepared for the first exhibition – Pharmapack in Paris. After the show, the visitors will receive a mail to thank them for visiting the show – including the information sheet of the UV print. In addition, the newest content of the UV print will be integrated on the homepage and a press release will be published in the 'Healthcare Packaging' magazine. Afterwards, an extended information sheet of the UV print is developed which will include further details. This information sheet will be taken by Stölzle's sales staff to the first personal customer meeting and is then published on the congress 'Pharma Science Research & Development'. But before the sales representatives visit the customers in France, Marketing provides a detailed sales training to achieve a uniform appearance at the customers. After attending the second show, the newest information are again integrated on the company website, send to the visitors and an article is published in the journal 'European Pharmaceutical Review'. After a short break of communication measures, the next customer visit is planned for May and two advertisements in the 'Packaging News' magazine and 'Journal of Pharmacy & Pharmaceutical Sciences'. To be prepared for the congress 'European Pharma Congress', an invitation is send to the customers and again an information sheet of the innovative UV print standard is prepared. Simultaneously, an article is released in the 'European Pharmaceutical Review' magazine. After the congress, the newest content is again integrated on the website for the public and send to the visitors and customers. At the beginning of September, another customer visit is scheduled to review the congress and announce the trade show 'CPhI worldwide', which is the most important show in the year for the pharmaceutical industry. At this event, the UV print is completely launched and introduced to the market. For the market introduction, a leaflet with the complete presentation of the UV printing and a new Pharma catalogue is prepared. An advertisement for announcing the market introduction at the exhibition is published in the 'Healthcare Packaging' magazine in parallel. After the UV print launch at the show, the market introduction is communicated on the website and the leaflet as well as new catalogue is sent to all visitors and customers in France. Additionally, the innovation will be spread to the crowd through professional magazines and newsletters. Finally, a personal meeting with the French customers is arranged to present the innovation again and to create demand.

The communication schedule on the next page shows the suggested communication activities for Stölzle for the year 2019 in the French pharmaceutical market. In this chart, the communication measures introduced above are positioned on a timeline for 2019.

Communication time schedule

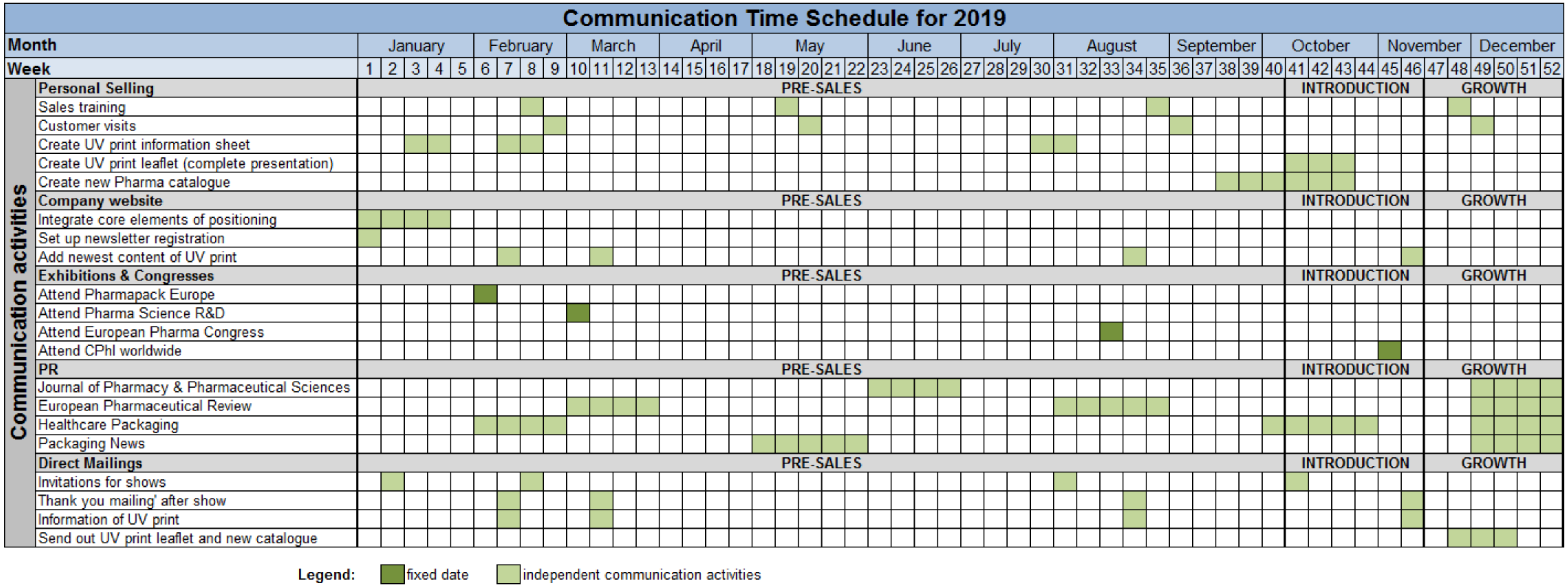


Table 17: Communication Flow Chart for Stölzle – 2019 (own presentation)

A copy of this schedule in a bigger format can be found in the appendix of this master thesis – page A-59.

14.4 Budget for Communication

For implementing a brand positioning concept, a budget needs to be defined for the communication measures. For this positioning concept, the budget is defined as a percentage of the Pharma revenue forecast in France for 2018 of € 4.5 million. Thus the author recommends to use 3% of the expected revenue for 2018 for the communication measures for the French pharmaceutical market in 2019 – € 135.000.

Calculation of the communication budget

For calculating the budget, different hourly wages for Marketing, Sales and the external graphic designer have been used. For Marketing € 20, for Sales € 25 and for the graphic designer € 70 per hour build the calculation basis. In addition, for the customer visits, € 350 for the flight to France and back, € 100 per night for accommodation and € 70 per day for car rentals are calculated. The business trips to France will take 5 days to have personal visits with all existing customers and some potential customers. Furthermore, one professional picture taken by the photographer costs € 400. For the printing material, an average value of € 1 per piece is assumed. The fee for publishing advertisements in professional magazines costs on average € 2.500. For exhibitions and congresses, € 89.500 are budgeted and distributed like shown in the table below:

Shows	Booth	Furniture/ Stand builder	Fee for speach	Badge	Travel costs	Additional equipment	SUM
Pharmapack Europe	€ 14.000 12 m2	€ 2.300	€ 1.800	no additional costs	€ 7.500 (5 persons)	€ 500	**€ 26.100**
Pharma Science R&D	-	-	-	€ 800	€ 1.250	€ 200	**€ 2.250**
European Pharma Congress	€ 2.300	€ 800	-	no additional costs	€ 1.250	€ 250	**€ 4.600**
CPhI worldwide	€ 19.000 33 m2	€ 19.000	€ 4.000	no additional costs	€ 13.600 (8 persons)	€ 950	**€ 56.550**

Table 18: Cost breakdown for shows (own presentation)

In the appendix on page A-62, the detailed cost breakdown for the shows is described. The total budget calculation for the communication measures is based on the professional experience of the author and the budget calculation of Stölzle for 2018 (cf. Stölzle Glass Group 2018b).

The table on the next page shows the budget planned for communication activities in 2019.

Budget for communication measures – 2019

Budget for communication activities - 2019														
Month		January	February	March	April	May	June	July	August	September	October	November	December	SUM
Communication activities	**Personal Selling**													**€ 12.500**
	Sales training		€ 20			€ 20			€ 20			€ 20		€ 80
	Customer visits		€ 2.400			€ 2.400				€ 2.400			€ 2.400	€ 9.600
	Create UV print information sheet	€ 300	€ 300						€ 300					€ 900
	Create UV print leaflet (complete presentation)										€ 740			€ 740
	Create new Pharma catalogue										€ 1.180			€ 1.180
	Company website													**€ 460**
	Integrate core elements of positioning	€ 200												€ 200
	Set up newsletter registration	€ 180												€ 180
	Add newest content of UV print		€ 20	€ 20					€ 20			€ 20		€ 80
	Exhibitions & Congresses													**€ 89.500**
	Attend Pharmapack Europe		€ 26.100											€ 26.100
	Attend Pharma Science R&D			€ 2.250										€ 2.250
	Attend European Pharma Congress								€ 4.600					€ 4.600
	Attend CPhI worldwide											€ 56.550		€ 56.550
	PR													**€ 25.800**
	Journal of Pharmacy & Pharmaceutical Sciences						€ 2.580						€ 2.580	€ 5.160
	European Pharmaceutical Review			€ 2.580					€ 2.580				€ 2.580	€ 7.740
	Healthcare Packaging		€ 2.580								€ 2.580		€ 2.580	€ 7.740
	Packaging News					€ 2.580							€ 2.580	€ 5.160
	Direct Mailings													**€ 680**
	Invitations for shows	€ 60	€ 60						€ 60		€ 60			€ 240
	Thank you mailing' after show		€ 60	€ 60					€ 60			€ 60		€ 240
	Information of UV print		€ 40	€ 40					€ 40			€ 40		€ 160
	Send out UV print leaflet and new catalogue												€ 40	€ 40
SUM		€ 740	€ 31.580	€ 4.950	€ 0	€ 5.000	€ 2.580	€ 0	€ 7.680	€ 2.400	€ 4.560	€ 56.690	€ 12.760	**€ 128.940**

Table 19: Recommended budget for communication activities – 2019 (own presentation)

In the appendix on page A-60, the budget calculation is shown in a bigger format. In addition, the calculated budget is shown in more detail on page A-61.

15 Recommendations for Brand Positioning Controlling

To monitor if the positioning as an innovative pharmaceutical glass packaging supplier in France has been implemented with success, regular controlling measures are advisable.

Strategic positioning controlling

For the strategic positioning controlling, it is necessary to evaluate the turnover. Since one company objective is to double the annual B2B sales revenue, analysis of the turnover development in France are recommended. In addition, 12 to 24 months after implementing the brand positioning, a primary market research should be conducted to evaluate which positioning alternative is the best choice after positioning alternative 4. However, after 3-5 years of implementing brand positioning idea 4, a primary market research is needed to monitor the brand awareness level, image development, brand preference and sympathy. This analysis supports in measuring the achievement of the second company objective regarding the level of brand awareness. Furthermore, KPI's regarding customer acquisition, retention and recovery should be monitored yearly to create comparative values.

Operative positioning controlling

Operative positioning controlling includes the monitoring of communication activities in the French pharmaceutical market. It analyses the suitability of the advertising activities for positioning the brand. Therefore, each communication discipline has to be reviewed separately. It is advisable to check for each communication channel if the communication reaches the right target group, transfers the defined messages and if the integration of content, formality and timing is achieved. Additionally, the compliance of the set budget has to be monitored. Furthermore, the budget spend on communication measures has to be put in relation to the revenue growth. If the money spend on communication raises rapidly in comparison to the revenue gained, the communication activities have to be reviewed and adopted.

16 Further Recommendations for Stölzle

For Stölzle it is recommended to implement the new brand positioning as soon as possible in order to achieve the set company targets by the end of 2020.

Since the selected brand positioning idea does not work for a long-term positioning, a connecting positioning alternative have to be implemented after 18 to 30 months. To make the best selection, the field research of 2018 needs to be repeated. This should be done between 12 to 24 months after the implementation of the brand positioning alternative 4. After analysing the research results, an additional value benefit analysis on the alternative 2 and 3 has to be conducted in cooperation of Marketing and Sales.

Once the market research is analysed and the connecting positioning idea is selected, the communication guideline needs to be adapted. The author recommends to rework the communication regarding:

- the sub goals of communication
- the strategy
- the communication mix
- the content/messages
- the time schedule

Subsequently, the author recommends to regularly monitor the achievement of objectives by strategic and operational controlling.

Finally, Stölzle should think about developing brand positioning concepts for other European key markets as well.

17 Résumé

This master thesis expresses the importance of brand positioning in highly competitive markets, where no differentiation through quality nor price can be reached. These circumstances prevented Stölzle from exploiting the market potential of the French pharmaceutical market in the last years. Especially in such markets a clear and unique brand positioning concept makes an important contribution to the company's success.

For completing this master thesis successfully, it was very essential to prepare an adequate theoretical basis which can effectively be put into practice. Therefore, this thesis provides a valuable guideline for developing a brand positioning concept. Another central conclusion of the author is, that a detailed market research was needed in order to adapt the positioning concept to the French pharmaceutical market conditions. An important learning was the procedure of carrying out a secondary and primary market research for this very challenging market environment. However, the most demanding task was to process the information obtained through the analysis and start developing the positioning concept for Stölzle. Hence, the author recommends to analyze the company as well as market environment in detail to ensure the success of the brand positioning.

Even if at first sight a differentiation from competition in the French pharmaceutical market was very difficult, four promising positioning ideas have been developed. A special outcome from the author's point of view is, that two positioning ideas are recommended for Stölzle to position its Pharma brand long-term. The author of this thesis is confident that the brand positioning through an innovation builds the base for a soft repositioning and will lead to success in this market.

Finally, it was very valuable for the author to run through the process of developing a brand positioning concept. The pharmaceutical industry and especially the French pharmaceutical market are very challenging. Thus, the author is very proud of gaining a detailed insight and knowledge of the market as well as developing a brand positioning concept for the author's current employer – Stölzle Glass Group.

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Appendix

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1 Milestone Plan

MILESTONES

Number	Code	Milestones	Deadline/Date	Done
1	1.4	Company Meeting with coach and Mrs. Marka	09.10.2017	✓
2	1.11	DS1 completed	27.10.2017	✓
3	1.16	Hand in MT-agreement	17.11.2017	✓
4	2.8	Theoretical part completed	01.01.2018	✓
5	2.20	DS 2 completed	26.01.2018	✓
6	3.5	Secondary Market Research completed	24.01.2018	✓
7	3.9	Send out questionnaire	05.02.2018	✓
8	3.15	Primary Market research completed	09.03.2018	✓
9	4.8	Positioning concept completed	01.04.2018	✓
10	4.10	Pracital Part completed	02.04.2018	✓
11	5.10	DS 3 completed	13.04.2018	✓
12	5.18	Hand in unbound Master Thesis	14.05.2018	✓
13	5.19	Master Thesis uploaded on moodle	14.05.2018	✓
14	5.22	Assessment of Master Thesis	CW 24	✓
15	5.23	Bounded Master Thesis handed in	29.06.2018	✓
16	5.24	Final presentation at Stölzle Glass Group	CW 27	✓
17	5.25	Final examination	CW 27	✓

Table A-1: Milestone Plan (own presentation)

2 Detailed Project Plan

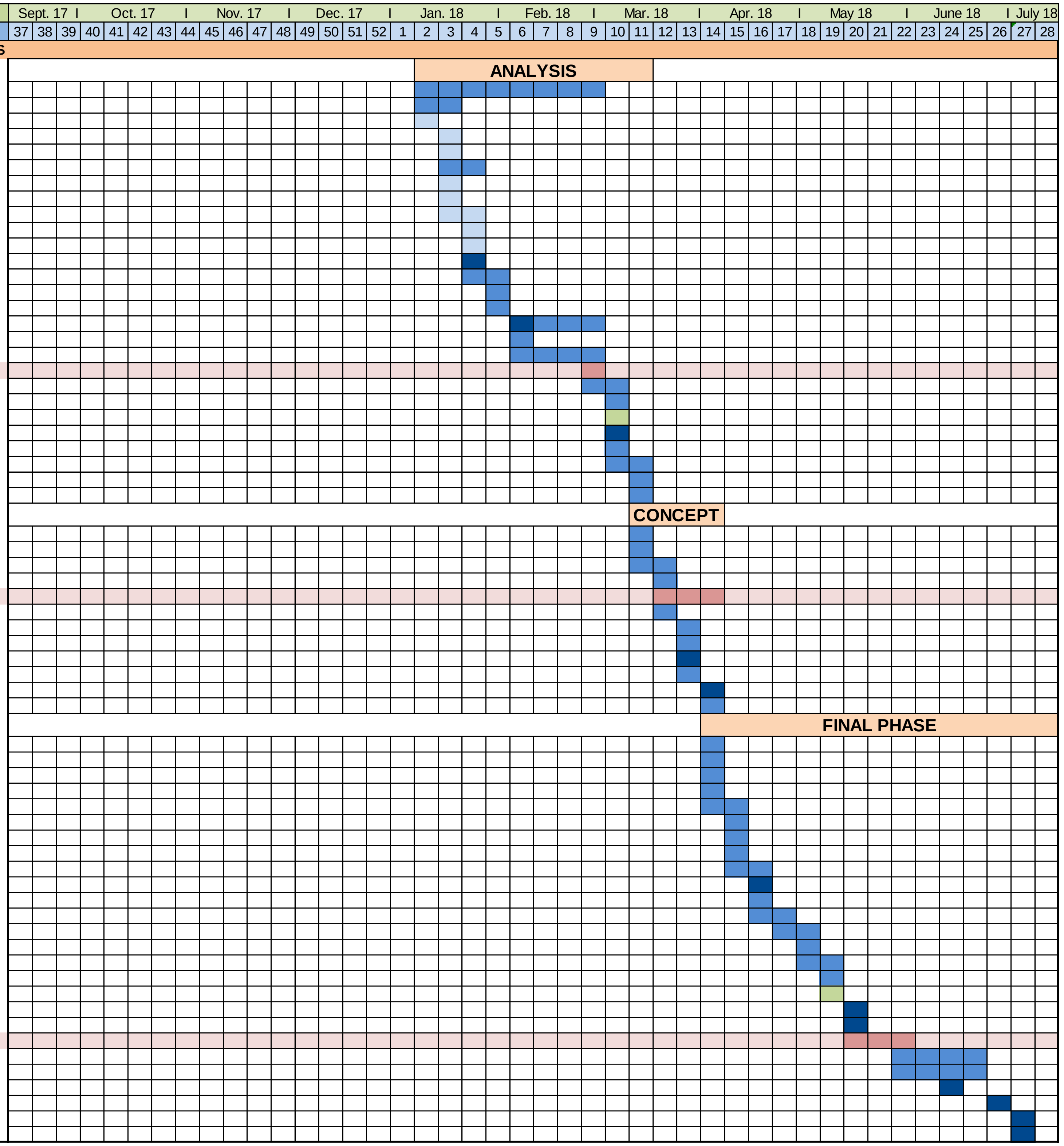
Month: Sept. 17 I Oct. 17 I Nov. 17 I Dec. 17 I Jan. 18 I Feb. 18 I Mar. 18 I Apr. 18 I May 18 I June 18 I July 18

Week: 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28

No.	ACTIVITY	FROM	TO	DURATION	FIXED DATES
1	**Starting Phase**	**15.09.2017**	**17.11.2017**	**9w + 1d**	STARTING PHASE
1.1	Start of the Master Thesis				15.09.2017
1.2	Literature research	15.09.2017	29.10.2017	6w + 3d	
1.3	Prepare basic concept	15.09.2017	19.10.2017	5w	
1.3.1	Rework company aims	16.09.2017	17.09.2017	2d	
1.3.2	Prepare initial situation & problem statement	18.09.2017	24.09.2017	1w	
1.3.3	Develop frame of reference	18.09.2017	19.10.2017	4w + 4d	
1.3.4	Receive announcement of coach				18.09.2017
1.3.5	Contact coach for appointment	18.09.2017	18.09.2017	1d	
1.3.6	Prepare draft of project plan	18.09.2017	19.10.2017	4w + 4d	
1.3.7	Create bibliography	18.09.2017	19.10.2017	4w + 4d	
1.3.8	Contact company for appointment	21.09.2017	21.09.2017	1d	
1.3.9	Prepare documents for 1. meeting with coach	02.10.2017	03.10.2017	2d	
1.3.10	Send basic concept to coach	03.10.2017	03.10.2017	1d	
1.3.11	Write company description	04.10.2017	05.10.2017	2d	
1.3.12	1. Meeting with coach	06.10.2017	06.10.2017	1d	
1.3.13	Adaption of MT	07.10.2017	08.10.2017	2d	
1.3.14	Preparation for Company Meeting	08.10.2017	08.10.2017	1d	
1.4	**Company Meeting**	**09.10.2017**	**09.10.2017**	1d	
1.5	Adaption of MT	10.10.2017	12.10.2017	3d	
1.6	Create presentation for DS 1	13.10.2017	15.10.2017	3d	
1.7	Send documents and presentation to coach	15.10.2017	15.10.2017	1d	
1.8	Include feedback from coach & proofreading	16.10.2017	19.10.2017	4d	
1.9	Upload documents for DS 1 on moodle				20.10.2017
1.10	Practice presentation for DS 1	20.10.2017	27.10.2017	1w + 1d	
1.11	**DS 1 completed**				**27.10.2017**
1.12	Appointment with coach	27.10.2017	27.10.2017	1d	
1.13	Implement feedback from DS 1	28.10.2017	12.11.2017	2w + 2d	
1.14	Prepare & sign MT-agreement	03.11.2017	06.11.2017	4d	
1.15	Reporting to company	06.11.2017	06.11.2017	1d	
1.16	**Hand in MT-agreement**				**17.11.2017**
2	**Theoretical Phase**	**30.10.2017**	**04.02.2018**	**14w**	THEORETICAL PHASE
2.1	Extensive literature research	30.10.2017	18.01.2018	11w + 4d	
2.2	Write Capture 2: B2B brand management	30.10.2017	19.11.2017	3w	
2.2.1	Fundamentals of B2B brand management	30.10.2017	02.11.2017	4d	
2.2.2	International brand managment	03.11.2017	05.11.2017	3d	
2.2.3	Specifics in pharma marketing	06.11.2017	09.11.2017	4d	
2.2.4	Specifics in pharma branding	10.11.2017	12.11.2017	3d	
2.2.5	Buying behaviour in pharmaceutical facilities	13.11.2017	16.11.2017	4d	
2.2.6	Time buffer	17.11.2017	19.11.2017	3d	
2.3	Write Capture 3: Brand positioning in B2B context	20.11.2017	06.12.2017	2w + 3d	
2.3.1	Definition of brand positioning and positioning process	20.11.2017	20.11.2017	1d	
2.3.2	Brand positioning objectives and information base	21.11.2017	21.11.2017	1d	
2.3.3	Brand positioning strategies	22.11.2017	27.12.2017	6d	
2.3.4	Brand positioning ideas	28.11.2017	01.12.2017	4d	
2.3.5	Implementation of brand positioning	02.12.2017	03.12.2017	2d	
2.3.6	Time buffer	04.12.2017	06.12.2017	3d	
2.4	Reporting to company	07.12.2017	07.12.2017	1d	
2.5	Write Capture 4: Implementation through IMC	08.11.2017	31.12.2017	3w + 3d	
2.5.1	Basics and specifics in B2B communication	08.12.2017	09.12.2017	2d	
2.5.2	Communication goal	10.12.2017	10.12.2017	1d	
2.5.3	Communication strategy	11.12.2017	12.12.2017	2d	
2.5.4	IMC for brand positioning	13.12.2017	15.12.2017	3d	
2.5.5	IMC programme	16.12.2017	18.12.2017	3d	
	Christmas Holidays Mr. Brandtner	23.12.2017	01.01.2018	1w + 3d	
	Christmas Holidays Mrs. Rudres	19.12.2017	26.12.2017	1w + 1d	
2.5.6	Budget for Communication	27.12.2017	27.12.2017	1d	
2.5.7	Time buffer	28.12.2017	30.12.2017	3d	
2.6	Write Capture 5: Brand Positioning Controlling	31.12.2017	31.12.2017	1d	
2.7	Write Conclusion of Theoretical Part	01.01.2018	01.01.2018	1d	
2.8	**Theoretical part completed**	**01.01.2018**	**01.01.2018**		
2.9	Send documents to coach	01.01.2018	01.01.2018	1d	
2.10	Reporting to company	02.01.2017	02.01.2017	1d	
2.11	Develop research design	02.01.2018	18.01.2018	2w + 3d	
2.12	Develop questionnaire	02.01.2018	04.02.2018	4w + 6d	
2.13	Include feedback from coach	04.01.2018	07.01.2018	4d	
2.14	Create presentation for DS 2	12.01.2018	13.01.2018	2d	
2.15	Send research documents to coach	13.01.2018	13.01.2018	1d	
2.16	Include feedback from coach & proofreading	15.01.2018	18.01.2018	4d	
2.17	Upload documents for DS 2 on moodle				19.01.2018
2.18	Practice DS2 presentation	19.01.2018	26.01.2018	1w + 1d	
2.19	**DS 2 completed**				**26.01.2018**
2.20	Appointment with coach	26.01.2018	26.01.2018	1d	
2.21	Implement feedback from DS 2	27.01.2018	01.02.2018	6d	
2.22	Reporting to company	02.02.2018	02.02.2018	1d	
2.23	Time buffer	03.02.2018	04.02.2018	2d	

Table A-2: Detailed Project Plan – Starting & Theoretical Phase (own presentation)

No.	ACTIVITY	FROM	TO	DURATION	FIXED DATES
3	**Practical Phase: Analysis**	**13.01.2018**	**16.03.2018**	**9w**	
3.1	Literature Research	13.01.2018	04.03.2018	7w + 2d	
3.2	Internal Analysis: Research	13.01.2018	17.01.2018	5d	
3.2.1	Performance in BU Pharma	13.01.2018	14.01.2018	2d	
3.2.2	Current customer base	15.01.2018	16.01.2018	2d	
3.2.3	Brand identity	17.01.2018	17.01.2018	1d	
3.3	Analysis of Business Environment: Research	18.01.2018	24.01.2018	1w	
3.3.1	French Pharmaceutical Market Data	18.01.2018	18.01.2018	1d	
3.3.2	Target Group Analysis	19.01.2018	20.01.2018	2d	
3.3.3	Competitor Analysis	21.01.2018	23.01.2018	3d	
3.3.4	Trends in Pharma Industry	24.01.2018	24.01.2018	1d	
3.4	Write Conclusion of Secondary Market Research	24.01.2018	24.01.2018	1d	
3.5	**Secondary Market Research completed**	**24.01.2018**	**24.01.2018**		
3.6	Inlcude feedback from coach in questionnaire	27.01.2018	29.01.2018	3d	
3.7	Pre-test questionnaire	01.02.2018	02.02.2018	2d	
3.8	Rework questionnaire	03.02.2018	04.02.2018	2d	
3.9	**Send out questionnaire**	**05.02.2018**	02.03.2018	3w + 5d	
3.10	Reporting to company	05.02.2018	05.02.2018	1d	
3.11	Clean copy of secondary market research	05.02.2018	02.03.2018	3w + 5d	
	Holidays Mr. Brandtner	19.02.2018	25.02.2018	1w	
3.12	Interpret findings	03.03.2018	05.03.2018	3d	
3.13	Write conclusion of Primary Market Research	06.03.2018	06.03.2018	1d	
3.14	Time Buffer	07.03.2018	08.03.2018	2d	
3.15	**Primary Market research completed**	**09.03.2018**	**09.03.2018**		
3.16	Appointment with coach	09.03.2018	09.03.2018	1d	
3.17	Rework secondary market research	10.03.2018	12.03.2018	3d	
3.18	Preparation of presentation	13.03.2018	15.03.2018	3d	
3.19	Interim presentation at company	16.03.2018	16.03.2018	1d	
4	**Practical Phase: Positioning Concept**	**14.03.2018**	**02.04.2018**	**2w + 6d**	
4.1	Define Brand Identity	14.03.2018	15.03.2018	2d	
4.2	Develop brand positioning aim	16.03.2018	16.03.2018	1d	
4.3	Develop brand positioning strategy	17.03.2018	19.03.2018	3d	
4.4	Develop brand positioning ideas	20.03.2018	24.03.2018	5d	
	Easter Holidays Mr. Brandtner	24.03.2018	02.04.2018	1w + 3d	
4.5	Brand positioning selection	25.03.2018	26.03.2018	2d	
4.6	Set up IMC Guideline	26.03.2018	31.03.2018	6d	
4.7	Define controlling measures	01.04.2018	01.04.2018	1d	
4.8	**Positioning concept completed**	**01.04.2018**	**01.04.2018**		
4.9	Write resume	02.04.2018	02.04.2018	1d	
4.10	**Pracital Part completed**	**02.04.2018**	**02.04.2018**		
4.11	Reporting to company	02.04.2018	02.04.2018	1d	
5	**Final Phase**	**03.04.2018**	**08.07.2018**	**13w + 6d**	
5.1	Meeting with coach	03.04.2018	03.04.2018	1d	
5.2	Include feedback from coach	04.04.2018	06.04.2018	3d	
5.3	Create DS 3 presentation	04.04.2018	06.04.2018	3d	
5.4	Send documents to coach	07.04.2018	07.04.2018	1d	
5.5	Check of formal guidlines	07.04.2018	09.04.2018	3d	
5.6	Include feedback from coach	10.04.2018	11.04.2018	2d	
5.7	Final check of DS 3 documents	12.04.2018	12.04.2018	1d	
5.8	Upload documents for DS 3 on moodle				13.04.2018
5.9	Practice DS 3 presentation	13.04.2018	19.04.2018		
5.10	**DS 3 completed**				**20.04.2018**
5.11	Appointment with coach	20.04.2018	20.04.2018		
5.12	Include feedback of DS 3	21.04.2018	25.04.2018	5d	
5.13	Proof reading	26.04.2018	02.05.2017	1w	
5.14	Write Zusammenfassung & Abstract	03.05.2018	05.05.2018	3d	
5.15	Revision of formal criteria	06.05.2018	08.05.2018	3d	
5.16	Print out MT	09.05.2018	09.05.2018	1d	
5.17	Time buffer	10.05.2018	13.05.2018	4d	
5.18	**Hand in unbound Master Thesis**				**14.05.2018**
5.19	**Master Thesis uploaded on moodle**				**14.05.2018**
	Holidays and Trade Fair Mrs. Rudres	14.05.2018	24.05.2018	1w + 11d	
5.20	Binding of Master Thesis	28.05.2018	24.06.2018	4w	
5.21	Prepare company presentation	28.05.2018	24.06.2018	4w	
5.22	**Assessment of Master Thesis**				**CW 24**
5.23	**Bounded Master Thesis handed in**				**29.06.2018**
5.24	**Final presentation at Stölzle Glass Group**				**CW 27**
5.25	**Final examination**				**CW 27**



PROJECT PLAN KEY

Milestones | Main Tasks | Subtasks | Time reserve | Holiday

Table A-3: Detailed Project Plan – Analysis, Concept & Final Phase (own presentation)

3 Weekly Plans

3.1 Starting phase

STARTING PHASE							
CW 38 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	18.09.	19.09.	20.09.	21.09.	22.09.	23.09.	24.09.
Literature Research for theoretical section							
Create bibliography							
Contact coach for appointment							
Literature Research for initial situation							
Internal analysis about Pharma business unit							
Contact Stölzle for appointment							
Write initial situation							
Formulate problem statement							
Prepare Frame of Reference							
Prepare project plan							

CW 39 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	25.09.	26.09.	27.09.	28.09.	29.09.	30.09.	01.10.
Literature Research for theoretical section							
Create bibliography							
Prepare Frame of Reference							
Prepare project plan							

CW 40 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	02.10.	03.10.	04.10.	05.10.	06.10.	07.10.	08.10.
Literature Research for theoretical section							
Create bibliography							
Prepare project plan							
Prepare Frame of Reference							
Prepare documents for meeting with coach							
Send documents for meeting to coach							
Write company description							
1. Meeting with coach							
Rework of documents according to feedback							
Prepare for company meeting							

CW 41 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	09.10.	10.10.	11.10.	12.10.	13.10.	14.10.	15.10.
Literature Research for theoretical section							
Create bibliography							
Prepare project plan							
Prepare Frame of Reference							
Hold company meeting							
Adaption of problem formulation							
Adaption of company objectives							
Preparation of presentation for DS1							
Send presentation for DS1 to coach							

Table A-4: Weekly Plan – Starting phase CW 38-41 (own presentation)

STARTING PHASE

CW 42 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	16.10.	17.10.	18.10.	19.10.	20.10.	21.10.	22.10.
Literature Research for theoretical section							
Create bibliography							
Prepare Frame of Reference							
Prepare project plan							
Include feedback from coach							
Proofreading of documents and presentation							
Upload documents on moodle for DS1							
Practice presentation for DS1							

CW 43 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	23.10.	24.10.	25.10.	26.10.	27.10.	28.10.	29.10.
Literature Research for theoretical section							
Practice presentation for DS1							
Read though all literature used for documents							
Attend DS1							
Appointment with coach							
Include feedback from DS1							

CW 44 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	30.10.	31.10.	01.11.	02.11.	03.11.	04.11.	05.11.
Include feedback from DS1							
Fill out MT-agreement							
Prepare monthly report for company							
Extensive literature research for theory							
Write "Fundamentals of B2B brand mgmt."							
Write "International brand management"							

CW 45 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	06.11.	07.11.	08.11.	09.11.	10.11.	11.11.	12.11.
Include feedback from DS1							
Sign MT-agreement							
Send montly report to company							
Extensive literature research for theory							
Write "Specifics in pharma marketing"							
Write "Specifics in pharma branding"							

CW 46 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	13.11.	14.11.	15.11.	16.11.	17.11.	18.11.	19.11.
Hand in MT-agreement							
Extensive literature research for theory							
Write "Supplier Mgmt. & buying behavior"							
Time buffer							
Send documents to coach							

PROJECT PLAN KEY			
Milestones	Subtasks	Time reserve	Holiday

Table A-5: Weekly Plan – Starting phase CW 42-46 (own presentation)

3.2 Theoretical phase

THEORETICAL PHASE

CW 44 - 2017

	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	30.10.	31.10.	01.11.	02.11.	03.11.	04.11.	05.11.
Include feedback from DS1							
Fill out MT-agreement							
Prepare monthly report for company							
Extensive literature research for theory							
Write "Fundamentals of B2B brand mgmt."							
Write "International brand management"							

CW 45 - 2017

	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	06.11.	07.11.	08.11.	09.11.	10.11.	11.11.	12.11.
Include feedback from DS1							
Sign MT-agreement							
Send montly report to company							
Extensive literature research for theory							
Write "Specifics in pharma marketing"							
Write "Specifics in pharma branding"							

CW 46 - 2017

	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	13.11.	14.11.	15.11.	16.11.	17.11.	18.11.	19.11.
Hand in MT-agreement							
Extensive literature research for theory							
Write "Supplier Mgmt. & buying behavior"							
Time buffer							
Send documents to coach							

CW 47 - 2017

	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	20.11.	21.11.	22.11.	23.11.	24.11.	25.11.	26.11.
Literature Research for theoretical section							
Write "Definition of brand positioning"							
Write "Brand positioning process"							
Write "Information base"							
Write "Brand positioning objectives"							
Write"Brand positioning strategy of Esch"							
Write "Brand positioning strategy of Kotler"							
Write "Brand positioning strategy of Ries"							
Include Feedback from coach for capture 2							

CW 48 - 2017

	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	27.11.	28.11.	29.11.	30.11.	01.12.	02.12.	03.12.
Literature Research for theoretical section							
Write "Brand positioning strategy of Ries"							
Write "Profile Requirements"							
Write "Perceptual Map"							
Write "Differentiation Model by Trout"							
Write "Implementation of brand positioning"							

Table A-6: Weekly Plan – Theoretical phase CW 44-48 (own presentation)

THEORETICAL PHASE							
CW 49 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	04.12.	05.12.	06.12.	07.12.	08.12.	09.12.	10.12.
Literature Research for theoretical section							
Write "Selection of positioning strategy & ideas"							
Send documents to coach							
Write monthly report for company							
Send monthly report to company							
Write "Basics and specifics of B2B communication"							
Write "Communication Goal"							

CW 50 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	11.12.	12.12.	13.12.	14.12.	15.12.	16.12.	17.12.
Literature Research for theoretical section							
Include Feedback from coach for capture 3							
Write "Communication strategy"							
Write "IMC for brand postioning"							
Write "IMC objectives"							
Write "IMC elements"							
Write "IMC instruments"							

CW 51 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	18.12.	19.12.	20.12.	21.12.	22.12.	23.12.	24.12.
Literature Research for theoretical section							
Write "IMC elements"							
Write "IMC instruments"							
Send documents to coach							
Holiday Mrs. Rudres							
Holiday Mr. Brandtner							

CW 52 - 2017							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	25.12.	26.12.	27.12.	28.12.	29.12.	30.12.	31.12.
Literature Research for theoretical section							
Holiday Mrs. Rudres							
Holiday Mr. Brandtner							
Write "Budget for communication"							
Include feedback from coach for capture 4							
Time buffer							
Write "Brand positioning controlling"							

Table A-7: Weekly Plan – Theoretical phase CW 49-52 (own presentation)

THEORETICAL PHASE							
CW 1 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	01.01.	02.01.	03.01.	04.01.	05.01.	06.01.	07.01.
Literature Research for theoretical section							
Holiday Mr. Brandtner							
Write "Conclusion & transition to theory"							
Complete theoretical part							
Send documents to coach							
Write monthly report for company							
Send report to company							
Develop research design							
Develop questionnaire							
Send research design & questionnaire to coach							
Include feedback from coach for capture 5							
Filter contacts of pharmaceutical manufacturers							

CW 2 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	08.01.	09.01.	10.01.	11.01.	12.01.	13.01.	14.01.
Literature Research for theoretical section							
Rework reserach design							
Rework questionnaire							
Create presentation for DS2							
Send questionnaire & presentation to coach							
Internal analysis: Performance in BU pharma							

CW 3 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	15.01.	16.01.	17.01.	18.01.	19.01.	20.01.	21.01.
Literature Research for theoretical section							
Rework reserach design							
Rework questionnaire							
Include feedback from coach for presentation							
Proofreading							
Upload DS2 documents on moodle							
Practice presentation for DS2							
Read through main literature							
Internal analysis: Customer base BU pharma							
Internal analysis: Brand identity							
External analysis: French pharma market							
External analysis: Target customers							
External analysis: Competitors							

Table A-8: Weekly Plan – Theoretical phase CW 1-3 (own presentation)

THEORETICAL PHASE							
CW 4 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	22.01.	23.01.	24.01.	25.01.	26.01.	27.01.	28.01.
Rework questionnaire							
Practice presentation for DS2							
Read through main literature							
External analysis: Competitors							
External analysis: Trends pharma industry							
Complete Secondary market research							
Intensive preparation for DS2							
Attend DS2							
Appointment with coach							
Rework questionnaire							
Include feedback from DS2							

CW 5 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	29.01.	30.01.	31.01.	01.02.	02.02.	03.02.	04.02.
Translate questionnaire into French							
Rework questionnaire							
Include feedback from DS2							
Write monthly report for company							
Send monthly report to company							
Programm questionnaire on SURVIO							
Pretest questionnaire							
Adapt questionnaire to feedback							

PROJECT PLAN KEY			
Milestones	Subtasks	Time reserve	Holiday

Table A-9: Weekly Plan – Theoretical phase CW 4-5 (own presentation)

3.3 Analysis phase

ANALYSIS PHASE							
CW 2 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	08.01.	09.01.	10.01.	11.01.	12.01.	13.01.	14.01.
Literature Research for theoretical section							
Rework reserach design							
Rework questionnaire							
Create presentation for DS2							
Send questionnaire & presentation to coach							
Internal analysis: Performance in BU pharma							

CW 3 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	15.01.	16.01.	17.01.	18.01.	19.01.	20.01.	21.01.
Literature Research for theoretical section							
Rework reserach design							
Rework questionnaire							
Include feedback from coach for presentation							
Proofreading							
Upload DS2 documents on moodle							
Practice presentation for DS2							
Read through main literature							
Internal analysis: Customer base BU pharma							
Internal analysis: Brand identity							
External analysis: French pharma market							
External analysis: Target customers							
External analysis: Competitors							

CW 4 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	22.01.	23.01.	24.01.	25.01.	26.01.	27.01.	28.01.
Rework questionnaire							
Practice presentation for DS2							
Read through main literature							
External analysis: Competitors							
External analysis: Trends pharma industry							
Complete Secondary market research							
Intensive preparation for DS2							
Attend DS2							
Appointment with coach							
Rework questionnaire							
Include feedback from DS2							

CW 5 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	29.01.	30.01.	31.01.	01.02.	02.02.	03.02.	04.02.
Rework questionnaire							
Include feedback from DS2							
Write monthly report for company							
Send monthly report to company							
Programm questionnaire on SURVIO							
Pretest questionnaire							
Adapt questionnaire to feedback							

Table A-10: Weekly Plan – Analysis phase CW 2-5 (own presentation)

ANALYSIS PHASE

CW 6 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	05.02.	06.02.	07.02.	08.02.	09.02.	10.02.	11.02.
Send out questionnaire							
Field Research							
Write monthly report for company							
Send monthly report to company							
Collect information about secondary research							
Clean copy of secondary research							

CW 7 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	12.02.	13.02.	14.02.	15.02.	16.02.	17.02.	18.02.
Field Research							
Collect information about secondary research							
Clean copy of secondary research							
Send reminder for questionnaire							

CW 8 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	19.02.	20.02.	21.02.	22.02.	23.02.	24.02.	25.02.
Field Research							
Collect information about secondary research							
Clean copy of secondary research							
Holiday Mr. Brandtner							
Send out questionnaire again							

CW 9 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	26.02.	27.02.	28.02.	01.03.	02.03.	03.03.	04.03.
Field Research							
Collect information about secondary research							
Clean copy of secondary research							
Send reminder for questionnaire							
Interpret results							

CW 10 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	05.03.	06.03.	07.03.	08.03.	09.03.	10.03.	11.03.
Interpret results							
Write conclusion of primary market research							
Time buffer							
Complete primary market research							
Appointment with coach							
Rework secondary market research							
Rework primary market research							

Table A-11: Weekly Plan – Analysis phase CW 6-10 (own presentation)

ANALYSIS PHASE							
CW 11 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	12.03.	13.03.	14.03.	15.03.	16.03.	17.03.	18.03.
Rework secondary market research							
Rework primary market research							
Prepare presentation for company meeting							
Present results of research to company							
Define new brand identity							
Develop brand positioning aim							
Develop brand positioning strategy							

PROJECT PLAN KEY			
Milestones	Subtasks	Time reserve	Holiday

Table A-12: Weekly Plan – Analysis phase CW 11 (own presentation)

3.4 Concept

CONCEPT							
CW 11 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	12.03.	13.03.	14.03.	15.03.	16.03.	17.03.	18.03.
Rework secondary market research							
Rework primary market research							
Prepare presentation for company meeting							
Present results of research to company							
Define new brand identity							
Develop brand positioning aim							
Develop brand positioning strategy							

CW 12 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	19.03.	20.03.	21.03.	22.03.	23.03.	24.03.	25.03.
Present results of research to company							
Develop brand positioning strategy							
Develop brand positioning ideas							
Holiday Mr. Brandtner							
Brand positioning selection							

CW 13 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	26.03.	27.03.	28.03.	29.03.	30.03.	31.03.	01.04.
Holiday Mr. Brandtner							
Brand positioning selection							
Define IMC objective							
Select communication instruments							
Define communication activities							
Set up time schedule							
Calculate the budget							
Develop controlling measures							
Complete positioning concept							

CW 14 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	02.04.	03.04.	04.04.	05.04.	06.04.	07.04.	08.04.
Write resume							
Complete practical part							
Write monthly report for company							
Send monthly report to company							
Meeting with coach							
Include feedback from coach							
Prepare presentation for DS3							
Send all documents to coach							
Check formal guidelines and quotations							

PROJECT PLAN KEY			
Milestones	Subtasks	Time reserve	Holiday

Table A-13: Weekly Plan – Concept CW 11-14 (own presentation)

3.5 Final phase

FINAL PHASE							
CW 14 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	02.04.	03.04.	04.04.	05.04.	06.04.	07.04.	08.04.
Write resume							
Complete practical part							
Write monthly report for company							
Send monthly report to company							
Meeting with coach							
Include feedback from coach							
Prepare presentation for DS3							
Send all documents to coach							
Check formal guidelines and quotations							

CW 15 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	09.04.	10.04.	11.04.	12.04.	13.04.	14.04.	15.04.
Check formal guidelines and quotations							
Include feedback from coach							
Final check of DS3 documents							
Formatting DS3 documents							
Upload DS3 documents on moodle							
Practice DS3 presentation							
Read through all the content							

CW 16 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	16.04.	17.04.	18.04.	19.04.	20.04.	21.04.	22.04.
Practice DS3 presentation							
Read through all the content							
Attend DS3							
Meeting with coach for feedback							
Include feedback of DS3							

CW 17 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	23.04.	24.04.	25.04.	26.04.	27.04.	28.04.	29.04.
Include feedback of DS3							
Proof reading							

CW 18 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	30.04.	01.05.	02.05.	03.05.	04.05.	05.05.	06.05.
Proof reading							
Write Zusammenfassung							
Write Abstract							
Review formal criteria							

CW 19 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	07.05.	08.05.	09.05.	10.05.	11.05.	12.05.	13.05.
Review formal criteria							
Print out MT							
Time buffer							

Table A-14: Weekly Plan – Final phase CW 14-19 (own presentation)

FINAL PHASE							
CW 20 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	14.05.	15.05.	16.05.	17.05.	18.05.	19.05.	20.05.
Hand in unbound MT							
Upload MT on moodle							
Business trip Mrs. Rudres							

CW 21 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	21.05.	22.05.	23.05.	24.05.	25.05.	26.05.	27.05.
Business trip Mrs. Rudres							

CW 22 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	28.05.	29.05.	30.05.	31.05.	01.06.	02.06.	03.06.
Binding of MT							
Prepare company presentation							
Study for final exam							

CW 23 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	04.06.	05.06.	06.06.	07.06.	08.06.	09.06.	10.06.
Binding of MT							
Prepare company presentation							
Study for final exam							

CW 24 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	11.06.	12.06.	13.06.	14.06.	15.06.	16.06.	17.06.
Binding of MT							
Prepare company presentation							
Study for final exam							
Receive assessment of MT							

CW 25 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	18.06.	19.06.	20.06.	21.06.	22.06.	23.06.	24.06.
Binding of MT							
Prepare company presentation							
Study for final exam							

CW 26 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	25.06.	26.06.	27.06.	28.06.	29.06.	30.06.	01.07.
Study for final exam							
Practice presentation at company							
Hand in bounded MT							

CW 27 - 2018							
	MON	TUE	WED	THU	FRI	SAT	SUN
Tasks	02.07.	03.07.	04.07.	05.07.	06.07.	07.07.	08.07.
Study for final exam							
Hold final presentation at company							
Attent final exam at Campus02							

PROJECT PLAN KEY			
Milestones	Subtasks	Time reserve	Holiday

Table A-15: Weekly Plan – Final phase CW 20-27 (own presentation)

4 Secondary Market Research – Target Customers

Company	Company size (entire company)	Revenue 2016
SANOFI WINTHROP INDUSTRIE	> 1000 employees	€ 10 652 000 000
UCB PHARMA SA	50 - 249 employees	€ 4 178 000 000
NOVARTIS PHARMA SAS	> 1000 employees	€ 1 963 124 586
LES LABORATOIRES SERVIER	> 1000 employees	€ 1 922 588 853
SANOFI AVENTIS FRANCE	> 1000 employees	€ 1 837 000 000
ROCHE	> 1000 employees	€ 1 414 713 077
LABORATOIRES LEO	500 - 999 employees	€ 1 324 548 669
MSD FRANCE	> 1000 employees	€ 1 312 321 433
SANOFI CHIMIE	> 1000 employees	€ 1 114 000 000
BAYER HEALTHCARE SAS	500 - 999 employees	€ 1 088 566 292
IPSEN PHARMA	500 - 999 employees	€ 1 084 567 984
ASTRAZENECA DUNKERQUE PRODUCTION	250 - 499 employees	€ 929 867 797
JANSSEN CILAG	> 1000 employees	€ 924 047 994
BRISTOL MYERS SQUIBB	250 - 499 employees	€ 842 488 351
PIERRE FABRE MEDICAMENT	500 - 999 employees	€ 829 363 880
ASTRAZENECA	500 - 999 employees	€ 828 617 523
PFIZER	500 - 999 employees	€ 759 651 064
ABBVIE	500 - 999 employees	€ 617 686 595
TEVA SANTE	> 1000 employees	€ 524 221 929
BOEHRINGER INGELHEIM FRANCE	500 - 999 employees	€ 438 334 389
LILLY FRANCE	> 1000 employees	€ 426 000 000
MERCK SANTE	500 - 999 employees	€ 425 607 837
MERCK SERONO	250 - 499 employees	€ 351 069 067
ABBOTT FRANCE	500 - 999 employees	€ 293 844 924
LABORATOIRES THEA	250 - 499 employees	€ 274 718 354
TAKEDA FRANCE SAS	50 - 249 employees	€ 261 816 331
BAXTER S A S	250 - 499 employees	€ 250 890 950
LABORATOIRE CHAUVIN	250 - 499 employees	€ 200 073 895
IPSEN PHARMA BIOTECH	50 - 249 employees	€ 194 761 306
GLAXO WELLCOME PRODUCTION	> 1000 employees	€ 187 251 348
LABORATOIRES BOUCHARA RECORDATI	250 - 499 employees	€ 173 407 556
MEDA PHARMA	50 - 249 employees	€ 172 677 527
RECKITT BENCKISER HEALTHCARE FRANCE	10 - 49 employees	€ 141 295 922
MYLAN MEDICAL SAS	50 - 249 employees	€ 139 697 562
LABOS MERCK SHARP & DOHME CHIBRET	500 - 999 employees	€ 128 429 070
ETHYPHARM	500 - 999 employees	€ 124 266 124
MYLAN LABORATORIES SAS	250 - 499 employees	€ 114 818 034
LABORATOIRES GENEVRIER SAS	50 - 249 employees	€ 90 664 741
NOVACYL	10 - 49 employees	€ 87 534 000
MUNDIPHARMA	50 - 249 employees	€ 80 863 289
NORGINE SAS	50 - 249 employees	€ 70 808 519
EISAI SAS	10 - 49 employees	€ 69 662 014
OTSUKA PHARMACEUTICAL FRANCE SAS	50 - 249 employees	€ 66 934 898
SCHERING PLOUGH	250 - 499 employees	€ 59 472 514
LES LABORATOIRES SERVIER INDUSTRIE	500 - 999 employees	€ 52 270 000
DIAGAST	50 - 249 employees	€ 35 733 320
WARNER CHILCOTT FRANCE	50 - 249 employees	€ 27 987 608
LABORATOIRE CCD	10 - 49 employees	€ 25 182 018
LABO REALISATION THERAPEUTIQUE	10 - 49 employees	€ 23 071 631
MALLINCKRODT FRANCE	10 - 49 employees	€ 18 929 720
ADARE PHARMACEUTICALS SAS	50 - 249 employees	€ 17 527 038
BOUCHARA RECORDATI	250 - 499 employees	€ 15 549 796
MAYOLY SANTE	250 - 499 employees	€ 15 367 183
LABORATOIRES CHAIX ET DU MARAIS	50 - 249 employees	€ 13 748 116
AMPHASTAR FRANCE PHARMACEUTICALS	50 - 249 employees	€ 11 954 796

Table A-16: Target customers of Stölzle in the French pharmaceutical market (own presentation)

5 Primary Market Research – Detailed Research Design

5.1 Market Research Problem

In the past, Stölzle has never carried out an image analysis in the French, German or Austrian pharmaceutical market. But an image analysis builds the base for identifying a possible image gap and for developing a brand positioning concept for the French pharmaceutical market.

5.2 Market Research Goals

<u>Main goal</u>

The goal of the primary market research is to carry out an image analysis of pharmaceutical glass packaging suppliers in the French, German and Austrian pharmaceutical market until 9th March 2018.

<u>Subgoals</u>

The subgoals of the primary market research are to find out:

- the general awareness level of the pharmaceutical glass packaging suppliers evaluated by pharmaceutical manufacturers
- the image of pharmaceutical glass packaging suppliers
- the information sources and communication channels used and preferred within the pharmaceutical industry
- the customer's demand and constellation of the buying centre within pharmaceutical facilities

5.3 Research Design

For defining a research design for the primary market research, the following elements have to be included:

- Need for information
- Survey method
- Survey period
- Population and sampling
- Survey instrument (cf. Kuß/Eisend 2010, p. 40f.; Berekoven/Eckert/Ellenrieder 2009, p. 32)

Need for Information

For developing a brand positioning concept for Stölzle, information about the company's general level of awareness and current image – in comparison to its competitors – and the target customer's buying behavior in the French, German and Austrian pharmaceutical market is needed. In addition, information regarding information sources and communication channels in the pharmaceutical industry are essential for creating a communication guideline.

Survey Method

In order to receive representative results for the image analysis, a quantitative survey will be conducted.

Survey Period

			Month	Jan. 18				I	Feb. 18			I	Mar. 18		
			Week	1	2	3	4	5	6	7	8	9	10	11	12
ACTIVITY	FROM	TO	DURATION	MARKET RESEARCH											
Develop research design	02.01.2018	18.01.2018	2w + 3d												
Develop questionnaire	02.01.2018	04.02.2018	4w + 6d												
Describe research design	02.01.2018	04.01.2018	3d												
Prepare questionnaire	02.01.2018	04.01.2018	3d												
Send documents to coach	04.01.2018	04.01.2018	1d												
Show documents to employees	04.01.2018	04.01.2018	1d												
Collect contacts	04.01.2018	07.01.2018	3d												
Rework research design	08.01.2018	18.01.2018	1w + 3d												
Rework questionnaire	08.01.2018	18.01.2018	1w + 3d												
Include feedback from DS2	27.01.2018	29.01.2018	3d												
Translate questionnaire into French	29.01.2018	29.01.2018	1d												
Programm questionnaire	30.01.2018	31.01.2018	2d												
Pretest questionnaire	01.02.2018	02.02.2018	2d												
Rework questionnaire	03.02.2018	04.02.2018	2d												
Send out questionnaire	05.02.2018	02.03.2018	3w + 5d												
Interpret findings	03.03.2018	05.03.2018	3d												
Prepare presentation	13.03.2018	15.03.2018	3d												
Interim presentation to company	16.03.2018	16.03.2018	1d												

PROJECT PLAN KEY		
Milestones	Main Tasks	Subtasks

Table A-17: Time schedule for primary market research (own presentation)

Population and Sampling

The population for the market research include all pharmaceutical companies which make use of primary glass packaging for their medicines and are situated in France, Germany or Austria. About 250 companies fulfill these requirements and therefore form the sample. Thus, the population and the sample are congruent, which leads to a complete survey.

Survey Instrument

For the survey instrument a standardized questionnaire was chosen. It consists mainly of closed questions including single or multiple choice, rating scales as well as semantic differential. One open question is used at the beginning to check the unaided brand awareness of the participants regarding pharmaceutical glass packaging suppliers.

Questionnaire design

In order to solve the market research problem and cover the need for information, the survey is divided into the four parts:

1. **Awareness level of pharmaceutical glass suppliers:** The objective is to find out the general level of awareness of pharmaceutical glass packaging suppliers and which of these companies are considered when buying pharmaceutical glass packaging.
2. **Image of pharmaceutical glass suppliers:** The objective is to get to know what is important when choosing a supplier or a pharmaceutical glass container and how pharmaceutical glass suppliers are evaluated.
3. **Information sources and communication channels:** The objective is to find out the usage patterns of the pharmaceutical manufacturers regarding information and communication sources.
4. **Customer demand and buying centre of pharmaceutical manufacturers:** The objective is to discover the usage of the different glass types and who is involved in the purchase decision process.

The survey is carried out online as it is a good option to gather information from three different countries and in a short time period. The market research tool which will be used is SURVIO. The questionnaire will be prepared in French, English and German language.

6 Questionnaire

6.1 German version

Guten Tag!

Mein Name ist Katja Rudres und ich bin eine Studentin der Fachhochschule Campus02 in Graz, Österreich. Im Rahmen meiner Masterarbeit führe ich eine Imageanalyse im pharmazeutischen Glasverpackungsmarkt durch. Daher bitte ich Sie an meiner anonymen Online-Umfrage teilzunehmen, welche 10-15 Minuten in Anspruch nehmen wird.

Vielen Dank für Ihre Unterstützung!

BEKANNTHEIT

Welche Unternehmen kennen Sie im pharmazeutischen Glasverpackungsmarkt? (Mehrfachantwort möglich)

____

Welche der folgenden Glasverpackungsunternehmen kennen Sie? (Mehrfachantwort möglich)

☐ SGD Pharma
☐ Gerresheimer
☐ Bormioli Pharma
☐ Stölzle Glass Group
☐ Piramal Glass
☐ Sonstige:____________________
☐ Wheaton
☐ Beatson Clark
☐ Rak Ghani
☐ Shandong Pharmaceutical Glass
☐ Schott

Welche der folgenden Glasverpackungsunternehmen berücksichtigt Ihr Unternehmen beim Kauf von pharmazeutischen Verpackungsglas? (Mehrfachantwort möglich)

☐ SGD Pharma
☐ Gerresheimer
☐ Bormioli Pharma
☐ Stölzle Glass Group
☐ Piramal Glass
☐ Sonstige:____________________
☐ Wheaton
☐ Beatson Clark
☐ Rak Ghani
☐ Shandong Pharmaceutical Glass
☐ Schott

Von welchen der folgenden Lieferanten hat Ihr Unternehmen bereits pharmazeutisches Verpackungsglas bezogen? (Mehrfachantwort möglich)

- ☐ SGD Pharma
- ☐ Gerresheimer
- ☐ Bormioli Pharma
- ☐ Stölzle Glass Group
- ☐ Piramal Glass
- ☐ Sonstige:___________________
- ☐ Wheaton
- ☐ Beatson Clark
- ☐ Rak Ghani
- ☐ Shandong Pharmaceutical Glass
- ☐ Schott

IMAGE

Bitte bewerten Sie die Wichtigkeit der folgenden Kriterien bei der Lieferantenauswahl in Ihrem Unternehmen bei einem **Erstkauf**.

	Sehr wichtig	Wichtig	Weder noch	Weniger wichtig	Unwichtig	Kann ich nicht beurteilen
Kompetente Vertriebsmitarbeiter	☐	☐	☐	☐	☐	☐
Renommiertes Unternehmen	☐	☐	☐	☐	☐	☐
Lange Erfahrung in der Glasproduktion	☐	☐	☐	☐	☐	☐
Überschaubares Leistungsangebot	☐	☐	☐	☐	☐	☐
Kurze Auftragsabwicklung	☐	☐	☐	☐	☐	☐
Viele Referenzen	☐	☐	☐	☐	☐	☐
Gute Rückverfolgbarkeit der Lieferung	☐	☐	☐	☐	☐	☐

Bitte bewerten Sie die Wichtigkeit der folgenden Kriterien bei der Lieferantenauswahl in Ihrem Unternehmen bei einem **Wiederkauf**.

	Sehr wichtig	Wichtig	Weder noch	Weniger wichtig	Unwichtig	Kann ich nicht beurteilen
Kompetente Vertriebsmitarbeiter	☐	☐	☐	☐	☐	☐
Renommiertes Unternehmen	☐	☐	☐	☐	☐	☐
Lange Erfahrung in der Glasproduktion	☐	☐	☐	☐	☐	☐
Überschaubares Leistungsangebot	☐	☐	☐	☐	☐	☐
Kurze Auftragsabwicklung	☐	☐	☐	☐	☐	☐
Viele Referenzen	☐	☐	☐	☐	☐	☐
Gute Rückverfolgbarkeit der Lieferung	☐	☐	☐	☐	☐	☐

Bitte bewerten Sie die Wichtigkeit der folgenden Kriterien bei der Auswahl von Verpackungsglas in Ihrem Unternehmen.

	Sehr wichtig	Wichtig	Weder noch	Weniger wichtig	Unwichtig	Kann ich nicht beurteilen
Hohe Qualität	☐	☐	☐	☐	☐	☐
Kundenindividuelle Verpackungslösungen	☐	☐	☐	☐	☐	☐
Innovative Verpackungslösungen	☐	☐	☐	☐	☐	☐
Niedriges Preisniveau	☐	☐	☐	☐	☐	☐
Ausreichende Zertifizierungen	☐	☐	☐	☐	☐	☐

Bitte bewerten Sie die folgenden Glasverpackungslieferanten anhand der angegebenen Aspekte.

SGD Pharma	Hohe Qualität	○ ○ ○ ○ ○ ○	Geringe Qualität
	Niedriges Preisniveau	○ ○ ○ ○ ○ ○	Hohes Preisniveau
	Kundenindividuelle Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
	Kompetente Vertriebsmitarbeiter	○ ○ ○ ○ ○ ○	Inkompetente Vertriebsmitarbeiter
	Renommiertes Unternehmen	○ ○ ○ ○ ○ ○	Unbekanntes Unternehmen
	Lange Erfahrung in der Glasproduktion	○ ○ ○ ○ ○ ○	Wenig Erfahrung in der Glasproduktion
	Überschaubares Leistungsangebot	○ ○ ○ ○ ○ ○	Nicht überschaubares Leistungsangebot
	Kurze Auftragsabwicklung	○ ○ ○ ○ ○ ○	Lange Auftragsabwicklung
	Gute Rückverfolgbarkeit der Lieferung	○ ○ ○ ○ ○ ○	Geringe Rückverfolgbarkeit der Lieferung
	Ausreichende Zertifizierungen	○ ○ ○ ○ ○ ○	Unzureichende Zertifizierungen
	Innovative Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
Gerresheimer	Hohe Qualität	○ ○ ○ ○ ○ ○	Geringe Qualität
	Niedriges Preisniveau	○ ○ ○ ○ ○ ○	Hohes Preisniveau
	Kundenindividuelle Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
	Kompetente Vertriebsmitarbeiter	○ ○ ○ ○ ○ ○	Inkompetente Vertriebsmitarbeiter
	Renommiertes Unternehmen	○ ○ ○ ○ ○ ○	Unbekanntes Unternehmen
	Lange Erfahrung in der Glasproduktion	○ ○ ○ ○ ○ ○	Wenig Erfahrung in der Glasproduktion
	Überschaubares Leistungsangebot	○ ○ ○ ○ ○ ○	Nicht überschaubares Leistungsangebot
	Kurze Auftragsabwicklung	○ ○ ○ ○ ○ ○	Lange Auftragsabwicklung
	Gute Rückverfolgbarkeit der Lieferung	○ ○ ○ ○ ○ ○	Geringe Rückverfolgbarkeit der Lieferung
	Ausreichende Zertifizierungen	○ ○ ○ ○ ○ ○	Unzureichende Zertifizierungen
	Innovative Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
Bormioli Pharma	Hohe Qualität	○ ○ ○ ○ ○ ○	Geringe Qualität
	Niedriges Preisniveau	○ ○ ○ ○ ○ ○	Hohes Preisniveau
	Kundenindividuelle Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
	Kompetente Vertriebsmitarbeiter	○ ○ ○ ○ ○ ○	Inkompetente Vertriebsmitarbeiter
	Renommiertes Unternehmen	○ ○ ○ ○ ○ ○	Unbekanntes Unternehmen
	Lange Erfahrung in der Glasproduktion	○ ○ ○ ○ ○ ○	Wenig Erfahrung in der Glasproduktion
	Überschaubares Leistungsangebot	○ ○ ○ ○ ○ ○	Nicht überschaubares Leistungsangebot
	Kurze Auftragsabwicklung	○ ○ ○ ○ ○ ○	Lange Auftragsabwicklung
	Gute Rückverfolgbarkeit der Lieferung	○ ○ ○ ○ ○ ○	Geringe Rückverfolgbarkeit der Lieferung
	Ausreichende Zertifizierungen	○ ○ ○ ○ ○ ○	Unzureichende Zertifizierungen
	Innovative Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen

Stölzle Glass Group	Hohe Qualität	○ ○ ○ ○ ○ ○	Geringe Qualität
	Niedriges Preisniveau	○ ○ ○ ○ ○ ○	Hohes Preisniveau
	Kundenindividuelle Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
	Kompetente Vertriebsmitarbeiter	○ ○ ○ ○ ○ ○	Inkompetente Vertriebsmitarbeiter
	Renommiertes Unternehmen	○ ○ ○ ○ ○ ○	Unbekanntes Unternehmen
	Lange Erfahrung in der Glasproduktion	○ ○ ○ ○ ○ ○	Wenig Erfahrung in der Glasproduktion
	Überschaubares Leistungsangebot	○ ○ ○ ○ ○ ○	Nicht überschaubares Leistungsangebot
	Kurze Auftragsabwicklung	○ ○ ○ ○ ○ ○	Lange Auftragsabwicklung
	Gute Rückverfolgbarkeit der Lieferung	○ ○ ○ ○ ○ ○	Geringe Rückverfolgbarkeit der Lieferung
	Ausreichende Zertifizierungen	○ ○ ○ ○ ○ ○	Unzureichende Zertifizierungen
	Innovative Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
Piramal Glass	Hohe Qualität	○ ○ ○ ○ ○ ○	Geringe Qualität
	Niedriges Preisniveau	○ ○ ○ ○ ○ ○	Hohes Preisniveau
	Kundenindividuelle Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
	Kompetente Vertriebsmitarbeiter	○ ○ ○ ○ ○ ○	Inkompetente Vertriebsmitarbeiter
	Renommiertes Unternehmen	○ ○ ○ ○ ○ ○	Unbekanntes Unternehmen
	Lange Erfahrung in der Glasproduktion	○ ○ ○ ○ ○ ○	Wenig Erfahrung in der Glasproduktion
	Überschaubares Leistungsangebot	○ ○ ○ ○ ○ ○	Nicht überschaubares Leistungsangebot
	Kurze Auftragsabwicklung	○ ○ ○ ○ ○ ○	Lange Auftragsabwicklung
	Gute Rückverfolgbarkeit der Lieferung	○ ○ ○ ○ ○ ○	Geringe Rückverfolgbarkeit der Lieferung
	Ausreichende Zertifizierungen	○ ○ ○ ○ ○ ○	Unzureichende Zertifizierungen
	Innovative Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
Schott	Hohe Qualität	○ ○ ○ ○ ○ ○	Geringe Qualität
	Niedriges Preisniveau	○ ○ ○ ○ ○ ○	Hohes Preisniveau
	Kundenindividuelle Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen
	Kompetente Vertriebsmitarbeiter	○ ○ ○ ○ ○ ○	Inkompetente Vertriebsmitarbeiter
	Renommiertes Unternehmen	○ ○ ○ ○ ○ ○	Unbekanntes Unternehmen
	Lange Erfahrung in der Glasproduktion	○ ○ ○ ○ ○ ○	Wenig Erfahrung in der Glasproduktion
	Überschaubares Leistungsangebot	○ ○ ○ ○ ○ ○	Nicht überschaubares Leistungsangebot
	Kurze Auftragsabwicklung	○ ○ ○ ○ ○ ○	Lange Auftragsabwicklung
	Gute Rückverfolgbarkeit der Lieferung	○ ○ ○ ○ ○ ○	Geringe Rückverfolgbarkeit der Lieferung
	Ausreichende Zertifizierungen	○ ○ ○ ○ ○ ○	Unzureichende Zertifizierungen
	Innovative Verpackungslösungen	○ ○ ○ ○ ○ ○	Standardisierte Verpackungslösungen

INFORMATIONSQUELLEN/KOMMUNIKATIONSKANÄLE

Wo erhalten Sie Informationen über Lieferanten/Produkte/Angebote im pharmazeutischen Glasverpackungsmarkt? (Mehrfachantwort möglich)

- ☐ Messen
- ☐ Unternehmenswebseite
- ☐ Newsletter/Mailings
- ☐ Presse Artikel
- ☐ Vertriebsmitarbeiter
- ☐ Kataloge
- ☐ Journale/Magazine
- ☐ Online Plattformen (Amazon, Google,...)
- ☐ Events
- ☐ Social Media Marketing (Facebook, XING/LinkedIn,...)
- ☐ Sonstiges:___________________

Wie bewerten Sie die **Wichtigkeit** der folgenden Informationsquellen im pharmazeutischen Glasverpackungsmarkt?

	Sehr wichtig	**Wichtig**	**Weder noch**	**Weniger wichtig**	**Unwichtig**	**Kann ich nicht beurteilen**
Messen	☐	☐	☐	☐	☐	☐
Newsletter/Mailings	☐	☐	☐	☐	☐	☐
Vertriebsmitarbeiter	☐	☐	☐	☐	☐	☐
Journale/Magazine	☐	☐	☐	☐	☐	☐
Events	☐	☐	☐	☐	☐	☐
Social Media Marketing	☐	☐	☐	☐	☐	☐
Unternehmenswebseite	☐	☐	☐	☐	☐	☐
Presse Artikel	☐	☐	☐	☐	☐	☐
Kataloge	☐	☐	☐	☐	☐	☐
Online Plattformen	☐	☐	☐	☐	☐	☐

Wie bewerten Sie die **Glaubwürdigkeit** der folgenden Informationsquellen im pharmazeutischen Glasverpackungsmarkt?

	Sehr glaub-würdig	**Glaub-würdig**	**Weder noch**	**Weniger glaub-würdig**	**Unglaub-würdig**	**Kann ich nicht beurteilen**
Messen	☐	☐	☐	☐	☐	☐
Newsletter/Mailings	☐	☐	☐	☐	☐	☐
Vertriebsmitarbeiter	☐	☐	☐	☐	☐	☐
Journale/Magazine	☐	☐	☐	☐	☐	☐
Events	☐	☐	☐	☐	☐	☐
Social Media Marketing	☐	☐	☐	☐	☐	☐
Unternehmenswebseite	☐	☐	☐	☐	☐	☐
Presse Artikel	☐	☐	☐	☐	☐	☐
Kataloge	☐	☐	☐	☐	☐	☐
Online Plattformen	☐	☐	☐	☐	☐	☐

KAUFVERHALTEN/NACHFRAGE

Welcher Glasverpackungstyp wird in Ihrem Unternehmen für pharmazeutische Produkte verwendet? (Mehrfachantwort möglich)

☐ Typ I

☐ Typ II

☐ Typ III

Welcher Glasverpackungstyp wird in Ihrem Unternehmen **am häufigsten** für pharmazeutische Produkte verwendet?

☐ Typ I

☐ Typ II

☐ Typ III

Bitte geben Sie die Verwendungshäufigkeit der folgenden pharmazeutischen Typ III-Glasbehälter an.

	Sehr oft	**Oft**	**Weder noch**	**Selten**	**Nie**	**Kann ich nicht beurteilen**
Sirupflaschen	☐	☐	☐	☐	☐	☐
Medizinflaschen	☐	☐	☐	☐	☐	☐
Tropfflaschen	☐	☐	☐	☐	☐	☐
Tablettengläser	☐	☐	☐	☐	☐	☐
Weithalsgläser	☐	☐	☐	☐	☐	☐
Cremetiegel	☐	☐	☐	☐	☐	☐
Injektionsflaschen	☐	☐	☐	☐	☐	☐
Infusionsflaschen	☐	☐	☐	☐	☐	☐
Transfusionsflaschen	☐	☐	☐	☐	☐	☐

Welche Personen sind in den Kaufprozess von pharmazeutischen Verpackungsglas in Ihrem Unternehmen involviert? (Mehrfachantwort möglich)

☐ Geschäftsführer/in

☐ Finanzleiter/in

☐ Produktionsleiter/in

☐ Qualitätsmanager/in

☐ Forschungs- &Entwicklungsmanager/in

☐ Einkaufsleiter/in

☐ Einkaufsmitarbeiter/in

☐ Maschinist/in

☐ Arbeitnehmervertreter/in

☐ Sekretär/in der Geschäftsleitung

☐ Andere:___________________

STATISTISCHE DATEN

Der Hauptsitz Ihres Unternehmens befindet sich im folgenden Land:

☐ Frankreich

☐ Deutschland

☐ Österreich

☐ Spanien

☐ Italien

☐ Russland

☐ USA

☐ Mexiko

☐ Brasilien

☐ Kanada

☐ Sonstiges:_______________

Das Unternehmen, indem Sie beschäftigt sind, befindet sich im folgenden Land:

☐ Frankreich

☐ Deutschland

☐ Österreich

Das Unternehmen beschäftigt:

☐ bis zu 9 Mitarbeiter

☐ zwischen 10 und 49 Mitarbeiter

☐ zwischen 50 und 250 Mitarbeiter

☐ mehr als 250 Mitarbeiter

Ihre Position im Unternehmen ist:

☐ Geschäftsführer/in

☐ Finanzleiter/in

☐ Produktionsleiter/in

☐ Qualitätsmanager/in

☐ Forschungs- &Entwicklungsmanager/in

☐ Einkaufsleiter/in

☐ Einkaufsmitarbeiter/in

☐ Maschinist/in

☐ Arbeitnehmervertreter/in

☐ Sekretär/in der Geschäftsleitung

☐ Andere:____________________

6.2 English version

Dear Sir or Madam!

My name is Katja Rudres and I am a student at Campus 02 - a University of Applied Sciences - in Graz, Austria. For my master thesis I am conducting an image analysis of the pharmaceutical glass packaging market. Therefore, I kindly ask you to participate in my anonymous online survey, which will take between 10 and 15 minutes.

Thank you very much for your support!

AWARENESS LEVEL

Which companies do you know in the pharmaceutical glass packaging market? (multiple-answer-question)

____

Which of the following glass packaging manufacturers do you know? (multiple-answer-question)

- ☐ SGD Pharma
- ☐ Gerresheimer
- ☐ Bormioli Pharma
- ☐ Stölzle Glass Group
- ☐ Piramal Glass
- ☐ Others:____________________
- ☐ Wheaton
- ☐ Beatson Clark
- ☐ Rak Ghani
- ☐ Shandong Pharmaceutical Glass
- ☐ Schott

Which of the following glass packaging manufacturers does your company consider when buying pharmaceutical glass packaging? (multiple-answer-question)

- ☐ SGD Pharma
- ☐ Gerresheimer
- ☐ Bormioli Pharma
- ☐ Stölzle Glass Group
- ☐ Piramal Glass
- ☐ Others:____________________
- ☐ Wheaton
- ☐ Beatson Clark
- ☐ Rak Ghani
- ☐ Shandong Pharmaceutical Glass
- ☐ Schott

From which suppliers has your company already bought pharmaceutical glass packaging? (multiple-answer-question)

- ☐ SGD Pharma
- ☐ Gerresheimer
- ☐ Bormioli Pharma
- ☐ Stölzle Glass Group
- ☐ Piramal Glass
- ☐ Others:___________________
- ☐ Wheaton
- ☐ Beatson Clark
- ☐ Rak Ghani
- ☐ Shandong Pharmaceutical Glass
- ☐ Schott

IMAGE

Please evaluate the importance of the following criteria for selecting a supplier in your company in the case of a **first purchase.**

	Very important	Important	Neither nor	Less important	Not important	Not known
Competent sales representatives	☐	☐	☐	☐	☐	☐
Well-known company	☐	☐	☐	☐	☐	☐
Long-term experience in producing glass	☐	☐	☐	☐	☐	☐
Easy and clear range of services	☐	☐	☐	☐	☐	☐
Fast order processing	☐	☐	☐	☐	☐	☐
Many references	☐	☐	☐	☐	☐	☐
Good traceability of delivery	☐	☐	☐	☐	☐	☐

Please evaluate the importance of the following criteria for selecting a supplier in your company in the case of a **repurchase.**

	Very important	Important	Neither nor	Less important	Not important	Not known
Competent sales representatives	☐	☐	☐	☐	☐	☐
Well-known company	☐	☐	☐	☐	☐	☐
Long-term experience in producing glass	☐	☐	☐	☐	☐	☐
Easy and clear range of services	☐	☐	☐	☐	☐	☐
Fast order processing	☐	☐	☐	☐	☐	☐
Many references	☐	☐	☐	☐	☐	☐
Good traceability of delivery	☐	☐	☐	☐	☐	☐

Please evaluate the importance of the following criteria for selecting packaging glass in your company.

	Very important	Important	Neither nor	Less important	Not important	Not known
High quality	☐	☐	☐	☐	☐	☐
Customized packaging solutions	☐	☐	☐	☐	☐	☐
Innovative packaging solutions	☐	☐	☐	☐	☐	☐
Low price level	☐	☐	☐	☐	☐	☐
Adequate certification	☐	☐	☐	☐	☐	☐

Please evaluate the following glass packaging suppliers based on the given aspects.

SGD Pharma	High quality	○ ○ ○ ○ ○ ○	Low quality
	Low price level	○ ○ ○ ○ ○ ○	High price level
	Customized packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
	Competent sales representatives	○ ○ ○ ○ ○ ○	Incompetent sales representatives
	Well-known company	○ ○ ○ ○ ○ ○	Unknown company
	Long experience in producing glass	○ ○ ○ ○ ○ ○	Little experience in producing glass
	Easily and clear range of services	○ ○ ○ ○ ○ ○	Unclear range of services
	Fast order processing	○ ○ ○ ○ ○ ○	Long order processing
	Good traceability of delivery	○ ○ ○ ○ ○ ○	Little traceability of delivery
	Adequate certification	○ ○ ○ ○ ○ ○	Inadequate certification
	Innovative packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
Gerresheimer	High quality	○ ○ ○ ○ ○ ○	Low quality
	Low price level	○ ○ ○ ○ ○ ○	High price level
	Customized packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
	Competent sales representatives	○ ○ ○ ○ ○ ○	Incompetent sales representatives
	Well-known company	○ ○ ○ ○ ○ ○	Unknown company
	Long experience in producing glass	○ ○ ○ ○ ○ ○	Little experience in producing glass
	Easily and clear range of services	○ ○ ○ ○ ○ ○	Unclear range of services
	Fast order processing	○ ○ ○ ○ ○ ○	Long order processing
	Good traceability of delivery	○ ○ ○ ○ ○ ○	Little traceability of delivery
	Adequate certification	○ ○ ○ ○ ○ ○	Inadequate certification
	Innovative packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
Bormioli Pharma	High quality	○ ○ ○ ○ ○ ○	Low quality
	Low price level	○ ○ ○ ○ ○ ○	High price level
	Customized packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
	Competent sales representatives	○ ○ ○ ○ ○ ○	Incompetent sales representatives
	Well-known company	○ ○ ○ ○ ○ ○	Unknown company
	Long experience in producing glass	○ ○ ○ ○ ○ ○	Little experience in producing glass
	Easily and clear range of services	○ ○ ○ ○ ○ ○	Unclear range of services
	Fast order processing	○ ○ ○ ○ ○ ○	Long order processing
	Good traceability of delivery	○ ○ ○ ○ ○ ○	Little traceability of delivery
	Adequate certification	○ ○ ○ ○ ○ ○	Inadequate certification
	Innovative packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions

Stölzle Glass Group	High quality	○ ○ ○ ○ ○ ○	Low quality
	Low price level	○ ○ ○ ○ ○ ○	High price level
	Customized packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
	Competent sales representatives	○ ○ ○ ○ ○ ○	Incompetent sales representatives
	Well-known company	○ ○ ○ ○ ○ ○	Unknown company
	Long experience in producing glass	○ ○ ○ ○ ○ ○	Little experience in producing glass
	Easily and clear range of services	○ ○ ○ ○ ○ ○	Unclear range of services
	Fast order processing	○ ○ ○ ○ ○ ○	Long order processing
	Good traceability of delivery	○ ○ ○ ○ ○ ○	Little traceability of delivery
	Adequate certification	○ ○ ○ ○ ○ ○	Inadequate certification
	Innovative packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
Piramal Glass	High quality	○ ○ ○ ○ ○ ○	Low quality
	Low price level	○ ○ ○ ○ ○ ○	High price level
	Customized packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
	Competent sales representatives	○ ○ ○ ○ ○ ○	Incompetent sales representatives
	Well-known company	○ ○ ○ ○ ○ ○	Unknown company
	Long experience in producing glass	○ ○ ○ ○ ○ ○	Little experience in producing glass
	Easily and clear range of services	○ ○ ○ ○ ○ ○	Unclear range of services
	Fast order processing	○ ○ ○ ○ ○ ○	Long order processing
	Good traceability of delivery	○ ○ ○ ○ ○ ○	Little traceability of delivery
	Adequate certification	○ ○ ○ ○ ○ ○	Inadequate certification
	Innovative packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
Schott	High quality	○ ○ ○ ○ ○ ○	Low quality
	Low price level	○ ○ ○ ○ ○ ○	High price level
	Customized packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions
	Competent sales representatives	○ ○ ○ ○ ○ ○	Incompetent sales representatives
	Well-known company	○ ○ ○ ○ ○ ○	Unknown company
	Long experience in producing glass	○ ○ ○ ○ ○ ○	Little experience in producing glass
	Easily and clear range of services	○ ○ ○ ○ ○ ○	Unclear range of services
	Fast order processing	○ ○ ○ ○ ○ ○	Long order processing
	Good traceability of delivery	○ ○ ○ ○ ○ ○	Little traceability of delivery
	Adequate certification	○ ○ ○ ○ ○ ○	Inadequate certification
	Innovative packaging solutions	○ ○ ○ ○ ○ ○	Standardized packaging solutions

INFORMATION SOURCES/COMMUNICATION CHANNELS

Where do you get your information about suppliers/products/offers in the pharmaceutical glass packaging industry from? (multiple-answer-question)

- ☐ Trade fairs
- ☐ Company website
- ☐ Newsletter/mailings
- ☐ Press articles
- ☐ Sales person
- ☐ Catalogues
- ☐ Journals/magazines
- ☐ Online platforms (Amazon, Google,...)
- ☐ Events
- ☐ Social Media Marketing (Facebook, XING/LinkedIn,...)
- ☐ Others:___________________

How **important** is information gained from different sources/communication channels in the pharmaceutical glass packaging market?

	Very important	**Important**	**Neither nor**	**Less important**	**Not important**	**Not known**
Trade fairs	☐	☐	☐	☐	☐	☐
Newsletter/mailings	☐	☐	☐	☐	☐	☐
Sales person	☐	☐	☐	☐	☐	☐
Journals/magazines	☐	☐	☐	☐	☐	☐
Events	☐	☐	☐	☐	☐	☐
Social Media Marketing	☐	☐	☐	☐	☐	☐
Company website	☐	☐	☐	☐	☐	☐
Press articles	☐	☐	☐	☐	☐	☐
Catalogues	☐	☐	☐	☐	☐	☐
Online platforms	☐	☐	☐	☐	☐	☐

How **credible** is information gained from different sources/communication channels in the pharmaceutical glass packaging market?

	Very credible	**Credible**	**Neither nor**	**Less credible**	**Not credible**	**Not known**
Trade fairs	☐	☐	☐	☐	☐	☐
Newsletter/mailings	☐	☐	☐	☐	☐	☐
Sales person	☐	☐	☐	☐	☐	☐
Journals/magazines	☐	☐	☐	☐	☐	☐
Events	☐	☐	☐	☐	☐	☐
Social Media Marketing	☐	☐	☐	☐	☐	☐
Company website	☐	☐	☐	☐	☐	☐
Press articles	☐	☐	☐	☐	☐	☐
Catalogues	☐	☐	☐	☐	☐	☐
Online platforms	☐	☐	☐	☐	☐	☐

CUSTOMER BEHAVIOUR/DEMAND

Which glass packaging type is used within your company for pharmaceutical products? (multiple-answer-question)

☐ Typ I

☐ Typ II

☐ Typ III

Which glass packaging type is used **most frequently** within your company for pharmaceutical products?

☐ Typ I

☐ Typ II

☐ Typ III

Please state the usage frequency of the following pharmaceutical type III glass containers.

	Very often	**Often**	**Neither nor**	**Rarely**	**Never**	**Not known**
Syrup bottles	☐	☐	☐	☐	☐	☐
Medicine bottles	☐	☐	☐	☐	☐	☐
Dropper bottles	☐	☐	☐	☐	☐	☐
Tablet jars	☐	☐	☐	☐	☐	☐
Wide mouth packers	☐	☐	☐	☐	☐	☐
Ointment jars	☐	☐	☐	☐	☐	☐
Injection vials	☐	☐	☐	☐	☐	☐
Infusion bottles	☐	☐	☐	☐	☐	☐
Transfusion bottles	☐	☐	☐	☐	☐	☐

Who is involved in the buying process for pharmaceutical glass packaging within your company? (multiple-answer-question)

☐ Managing director

☐ Financial officer

☐ Production director

☐ Quality manager

☐ Research & Development manager

☐ Purchasing director

☐ Purchasing employee

☐ Machine operator

☐ Employee representative

☐ Secretary of the managing director

☐ Others:___________________

STATISTICAL INFORMATION

The headquarters of your company is located in:

☐ France

☐ Germany

☐ Austria

☐ Spain

☐ Italy

☐ Russia

☐ USA

☐ Mexico

☐ Brazil

☐ Canada

☐ Others:______________

The company you work for is located in:

☐ France

☐ Germany

☐ Austria

The company employs in total:

☐ up to 9 employees

☐ between 10 and 49 employees

☐ between 50 and 250 employees

☐ more than 250 employees

Your position in the company is:

☐ Managing director

☐ Financial officer

☐ Production director

☐ Quality manager

☐ Research & Development manager

☐ Purchasing director

☐ Purchasing employee

☐ Machine operator

☐ Employee representative

☐ Secretary of the managing director

☐ Others:___________________

6.3 French version

Cher Monsieur ou Madame !

Je m'appelle Katja Rudres et je suis étudiante au Campus 02 - une université de sciences appliquées - à Graz en Autriche. Pour ma thèse de master, je réalise une analyse sur du marché de l'emballage pharmaceutique en verre. Par conséquent, vous serait-il possible de participer à mon sondage en ligne de façon anonyme, qui prend entre 10 et 15 minutes.

Merci beaucoup pour votre soutient !

NIVEAU DE SENSIBILISATION

Quelles sociétés connaisez-vous sur le marché du packaging en verre pour le secteur Pharmaceutique? (plusieurs réponses possible)

____

Lequel de ses verriers connaissez-vous? (plusieurs réponses possible)

☐ SGD Pharma	☐ Wheaton
☐ Gerresheimer	☐ Beatson Clark
☐ Bormioli Pharma	☐ Rak Ghani
☐ Stölzle Glass Group	☐ Shandong Pharmaceutical Glass
☐ Piramal Glass	☐ Schott
☐ Autres:____________________	

Lequel des fabricants d’emballage en verre suivants considère votre entreprise lors de l’achat d’emballages pharmaceutiques en verre? (plusieurs réponses possible)

☐ SGD Pharma	☐ Wheaton
☐ Gerresheimer	☐ Beatson Clark
☐ Bormioli Pharma	☐ Rak Ghani
☐ Stölzle Glass Group	☐ Shandong Pharmaceutical Glass
☐ Piramal Glass	☐ Schott
☐ Autres:____________________	

Chez quel fournisseur votre entreprise a-t-elle déjà acheté des emballages pharmaceutiques en verre? (plusieurs réponses possible)

☐ SGD Pharma
☐ Wheaton
☐ Gerresheimer
☐ Beatson Clark
☐ Bormioli Pharma
☐ Rak Ghani
☐ Stölzle Glass Group
☐ Shandong Pharmaceutical Glass
☐ Piramal Glass
☐ Schott
☐ Autres:__________________

IMAGE

Merci d'évaluer l'importance des critères suivants pour sélectionner un fournisseur dans votre entreprise dans le cas d'un **premier achat**.

	Très important	**Important**	**Jamais encore**	**Moins important**	**Pas important**	**Ne sais pas**
Des vendeurs compétents	☐	☐	☐	☐	☐	☐
Société connue	☐	☐	☐	☐	☐	☐
Longue expérience dans la production du verre	☐	☐	☐	☐	☐	☐
Offre facilement compréhensible	☐	☐	☐	☐	☐	☐
Traitement de commande rapide	☐	☐	☐	☐	☐	☐
Plusieurs références	☐	☐	☐	☐	☐	☐
Bonne traçabilité de livraison	☐	☐	☐	☐	☐	☐

Merci d'évaluer l'importance des critères suivants pour choisir un fournisseur dans votre entreprise dans le cas d'un **rachat**.

	Très important	**Important**	**Jamais encore**	**Moins important**	**Pas important**	**Ne sais pas**
Des vendeurs compétents	☐	☐	☐	☐	☐	☐
Société connue	☐	☐	☐	☐	☐	☐
Longue expérience dans la production du verre	☐	☐	☐	☐	☐	☐
Offre facilement compréhensible	☐	☐	☐	☐	☐	☐
Traitement de commande rapide	☐	☐	☐	☐	☐	☐
Plusieurs références	☐	☐	☐	☐	☐	☐
Bonne traçabilité de livraison	☐	☐	☐	☐	☐	☐

Merci d'évaluer l'importance des critères suivants dans le choix d'un prestataire verrier.

	Très important	**Important**	**Jamais encore**	**Moins important**	**Pas important**	**Ne sais pas**
Qualité haute	☐	☐	☐	☐	☐	☐
Solutions de packaging personnalisées	☐	☐	☐	☐	☐	☐
Solutions de packaging innovantes	☐	☐	☐	☐	☐	☐
Niveau de prix bas	☐	☐	☐	☐	☐	☐
Certification adéquate	☐	☐	☐	☐	☐	☐

Merci d'évaluer les fournisseurs d'emballage en verre suivants avec les aspects donnés.

SGD Pharma	Qualité haute	○ ○ ○ ○ ○ ○	Qualité basse
	Niveau de prix bas	○ ○ ○ ○ ○ ○	Niveau de prix élevé
	Des solutions de packaging personnalisées	○ ○ ○ ○ ○ ○	Des solutions de packaging standards
	Des vendeurs compétents	○ ○ ○ ○ ○ ○	Des vendeurs incompétents
	Sociétés connues	○ ○ ○ ○ ○ ○	Société inconnue
	Longue expérience dans la production du verre	○ ○ ○ ○ ○ ○	Petite expérience dans la production du verre
	Offre compréhensible facilement	○ ○ ○ ○ ○ ○	Offre inestimable
	Traitement de commande rapide	○ ○ ○ ○ ○ ○	Traitement de commande long
	Bonne traçabilité de livraison	○ ○ ○ ○ ○ ○	Faible traçabilité de livraison
	Certification adéquat	○ ○ ○ ○ ○ ○	Certification inadéquat
	Solutions de packaging innovantes	○ ○ ○ ○ ○ ○	Solutions de packaging standard
Gerresheimer	Qualité haute	○ ○ ○ ○ ○ ○	Qualité basse
	Niveau de prix bas	○ ○ ○ ○ ○ ○	Niveau de prix élevé
	Des solutions de packaging personnalisées	○ ○ ○ ○ ○ ○	Des solutions de packaging standards
	Des vendeurs compétents	○ ○ ○ ○ ○ ○	Des vendeurs incompétents
	Sociétés connues	○ ○ ○ ○ ○ ○	Société inconnue
	Longue expérience dans la production du verre	○ ○ ○ ○ ○ ○	Petite expérience dans la production du verre
	Offre compréhensible facilement	○ ○ ○ ○ ○ ○	Offre inestimable
	Traitement de commande rapide	○ ○ ○ ○ ○ ○	Traitement de commande long
	Bonne traçabilité de livraison	○ ○ ○ ○ ○ ○	Faible traçabilité de livraison
	Certification adéquat	○ ○ ○ ○ ○ ○	Certification inadéquat
	Solutions de packaging innovantes	○ ○ ○ ○ ○ ○	Solutions de packaging standard
Bormioli Pharma	Qualité haute	○ ○ ○ ○ ○ ○	Qualité basse
	Niveau de prix bas	○ ○ ○ ○ ○ ○	Niveau de prix élevé
	Des solutions de packaging personnalisées	○ ○ ○ ○ ○ ○	Des solutions de packaging standards
	Des vendeurs compétents	○ ○ ○ ○ ○ ○	Des vendeurs incompétents
	Sociétés connues	○ ○ ○ ○ ○ ○	Société inconnue
	Longue expérience dans la production du verre	○ ○ ○ ○ ○ ○	Petite expérience dans la production du verre
	Offre compréhensible facilement	○ ○ ○ ○ ○ ○	Offre inestimable
	Traitement de commande rapide	○ ○ ○ ○ ○ ○	Traitement de commande long
	Bonne traçabilité de livraison	○ ○ ○ ○ ○ ○	Faible traçabilité de livraison
	Certification adéquat	○ ○ ○ ○ ○ ○	Certification inadéquat
	Solutions de packaging innovantes	○ ○ ○ ○ ○ ○	Solutions de packaging standard

Stölzle Glass Group	Qualité haute	○ ○ ○ ○ ○ ○	Qualité basse
	Niveau de prix bas	○ ○ ○ ○ ○ ○	Niveau de prix élevé
	Des solutions de packaging personnalisées	○ ○ ○ ○ ○ ○	Des solutions de packaging standards
	Des vendeurs compétents	○ ○ ○ ○ ○ ○	Des vendeurs incompétents
	Sociétés connues	○ ○ ○ ○ ○ ○	Société inconnue
	Longue expérience dans la production du verre	○ ○ ○ ○ ○ ○	Petite expérience dans la production du verre
	Offre compréhensible facilement	○ ○ ○ ○ ○ ○	Offre inestimable
	Traitement de commande rapide	○ ○ ○ ○ ○ ○	Traitement de commande long
	Bonne traçabilité de livraison	○ ○ ○ ○ ○ ○	Faible traçabilité de livraison
	Certification adéquat	○ ○ ○ ○ ○ ○	Certification inadéquat
	Solutions de packaging innovantes	○ ○ ○ ○ ○ ○	Solutions de packaging standard
Piramal Glass	Qualité haute	○ ○ ○ ○ ○ ○	Qualité basse
	Niveau de prix bas	○ ○ ○ ○ ○ ○	Niveau de prix élevé
	Des solutions de packaging personnalisées	○ ○ ○ ○ ○ ○	Des solutions de packaging standards
	Des vendeurs compétents	○ ○ ○ ○ ○ ○	Des vendeurs incompétents
	Sociétés connues	○ ○ ○ ○ ○ ○	Société inconnue
	Longue expérience dans la production du verre	○ ○ ○ ○ ○ ○	Petite expérience dans la production du verre
	Offre compréhensible facilement	○ ○ ○ ○ ○ ○	Offre inestimable
	Traitement de commande rapide	○ ○ ○ ○ ○ ○	Traitement de commande long
	Bonne traçabilité de livraison	○ ○ ○ ○ ○ ○	Faible traçabilité de livraison
	Certification adéquat	○ ○ ○ ○ ○ ○	Certification inadéquat
	Solutions de packaging innovantes	○ ○ ○ ○ ○ ○	Solutions de packaging standard
Schott	Qualité haute	○ ○ ○ ○ ○ ○	Qualité basse
	Niveau de prix bas	○ ○ ○ ○ ○ ○	Niveau de prix élevé
	Des solutions de packaging personnalisées	○ ○ ○ ○ ○ ○	Des solutions de packaging standards
	Des vendeurs compétents	○ ○ ○ ○ ○ ○	Des vendeurs incompétents
	Sociétés connues	○ ○ ○ ○ ○ ○	Société inconnue
	Longue expérience dans la production du verre	○ ○ ○ ○ ○ ○	Petite expérience dans la production du verre
	Offre compréhensible facilement	○ ○ ○ ○ ○ ○	Offre inestimable
	Traitement de commande rapide	○ ○ ○ ○ ○ ○	Traitement de commande long
	Bonne traçabilité de livraison	○ ○ ○ ○ ○ ○	Faible traçabilité de livraison
	Certification adéquat	○ ○ ○ ○ ○ ○	Certification inadéquat
	Solutions de packaging innovantes	○ ○ ○ ○ ○ ○	Solutions de packaging standard

SOURCES D’INFORMATION ET CANAUX DE COMMUNICATION

Où trouvez-vous des informations sur les fournisseurs, produits et offres dans l’industrie du verre pharmaceutique? (plusieurs réponses possible)

- ☐ Salons
- ☐ Newsletter/mailing
- ☐ Les commerciaux
- ☐ Journaux/magazines
- ☐ Evènements
- ☐ Réseaux sociaux (Facebook, XING/LinkedIn,...)
- ☐ Autres:___________________
- ☐ Site internet des sociétés
- ☐ Articles de presse
- ☐ Catalogues
- ☐ Plateformes en ligne (Amazon, Google,...)

Merci d'évaluer **l'importance** des sources d'informations/communication suivantes sur le marché de l'emballage pharmaceutique en verre?

	Très important	**Important**	**Jamais encore**	**Moins important**	**Pas important**	**Ne sais pas**
Salons	☐	☐	☐	☐	☐	☐
Newsletter/mailings	☐	☐	☐	☐	☐	☐
Les commerciaux	☐	☐	☐	☐	☐	☐
Journaux/magazines	☐	☐	☐	☐	☐	☐
Evénements	☐	☐	☐	☐	☐	☐
Réseaux sociaux	☐	☐	☐	☐	☐	☐
Site internet des sociétés	☐	☐	☐	☐	☐	☐
Articles de presse	☐	☐	☐	☐	☐	☐
Catalogues	☐	☐	☐	☐	☐	☐
Plateformes en ligne	☐	☐	☐	☐	☐	☐

Merci d'évaluer **la crédibilité** des sources d'informations/communication suivantes sur le marché de l'emballage pharmaceutique en verre?

	Très crédible	**Crédible**	**Jamais encore**	**Moins crédible**	**Pas crédible**	**Ne sais pas**
Salons	☐	☐	☐	☐	☐	☐
Newsletter/mailings	☐	☐	☐	☐	☐	☐
Les commerciaux	☐	☐	☐	☐	☐	☐
Journaux/magazines	☐	☐	☐	☐	☐	☐
Evénements	☐	☐	☐	☐	☐	☐
Réseaux sociaux	☐	☐	☐	☐	☐	☐
Site internet des sociétés	☐	☐	☐	☐	☐	☐
Articles de presse	☐	☐	☐	☐	☐	☐
Catalogues	☐	☐	☐	☐	☐	☐
Plateformes en ligne	☐	☐	☐	☐	☐	☐

COMPORTEMENT CLIENT/DEMANDE

Quel type d'emballage en verre est utilisé dans votre entreprise pour vos produits pharmaceutiques? (plusieurs réponses possibles)

☐ Type I

☐ Type II

☐ Type III

Quel type d'emballage en verre est **le plus souvent utilisé** dans votre entreprise pour vos produits pharmaceutiques?

☐ Type I

☐ Type II

☐ Type III

Merci d'indiquer la fréquence d'utilisation d'un récipient en verre pharmaceutique de type III suivants.

	Très fréquemment	**Fréquemment**	**Jamais encore**	**Rare**	**Presque jamais**	**Ne sais pas**
Flacons pour sirops	☐	☐	☐	☐	☐	☐
Flacons pour médicaments	☐	☐	☐	☐	☐	☐
Flacons compte-gouttes	☐	☐	☐	☐	☐	☐
Bocaux pour comprimés	☐	☐	☐	☐	☐	☐
Flacons á large goulot	☐	☐	☐	☐	☐	☐
Pots pour pommades	☐	☐	☐	☐	☐	☐
Flacons pour injectables	☐	☐	☐	☐	☐	☐
Flacons de perfusion	☐	☐	☐	☐	☐	☐
Bouteilles pour transfusion	☐	☐	☐	☐	☐	☐

Qui est impliqué dans le processus d'achat des emballages pharmaceutiques en verre au sein de votre Société? (plusieurs réponses possible)

☐ Directeur général

☐ Agent financier

☐ Directeur de production

☐ Gestionnaire de la qualité

☐ Responsable de la recherche et du développement

☐ Directeur des achats

☐ Acheteur

☐ Opérateur de machine

☐ Représentant des employés

☐ Secrétaire du directeur général

☐ Autres:____________________

L’INFORMATION STATISTIQUE

Localisation de votre siege social:

☐ France

☐ Allemagne

☐ Autriche

☐ Espagne

☐ Italie

☐ Russie

☐ Etats-Unis

☐ Mexique

☐ Brésil

☐ Canada

☐ Autres:_______________

Localisation de votre Société:

☐ France

☐ Allemagne

☐ Autriche

La société emploie au total:

☐ jusque 9 employés

☐ entre 10 et 49 employés

☐ entre 50 et 250 employés

☐ plus de 250 employés

Votre poste dans la Société:

☐ Directeur général

☐ Agent financier

☐ Directeur de production

☐ Gestionnaire de la qualité

☐ Responsable de la recherche et du développement

☐ Directeur des achats

☐ Acheteur

☐ Opérateur de machine

☐ Représentant des employés

☐ Secrétaire du directeur général

☐ Autres:____________________

7 Primary Market Research - additional interpretations

7.1 Image

The following company profiles has been determined through contrasting pairs. Graph A-1 shows the image profile of Stölzle in the French, German and Austrian pharmaceutical glass packaging market.

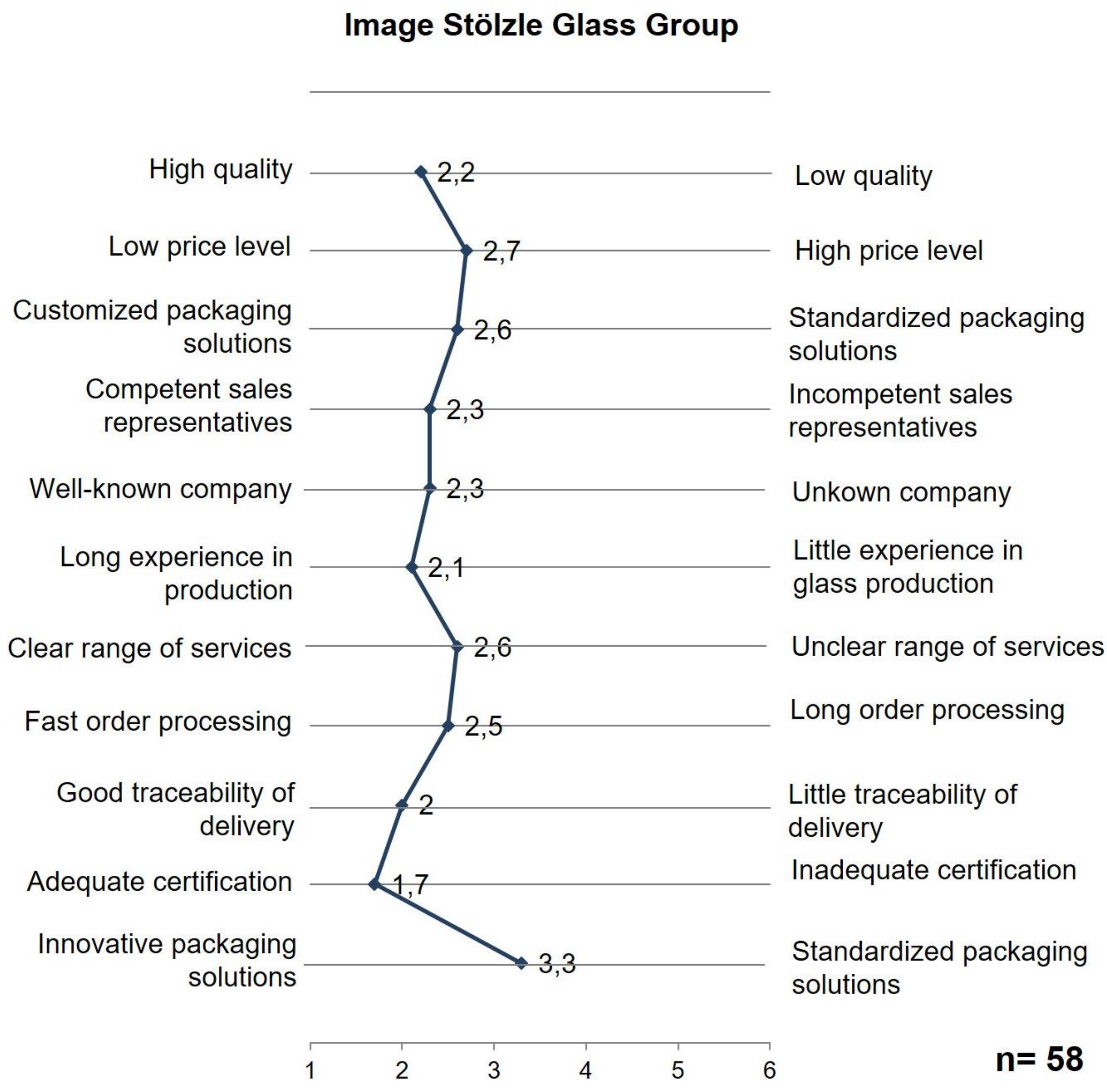
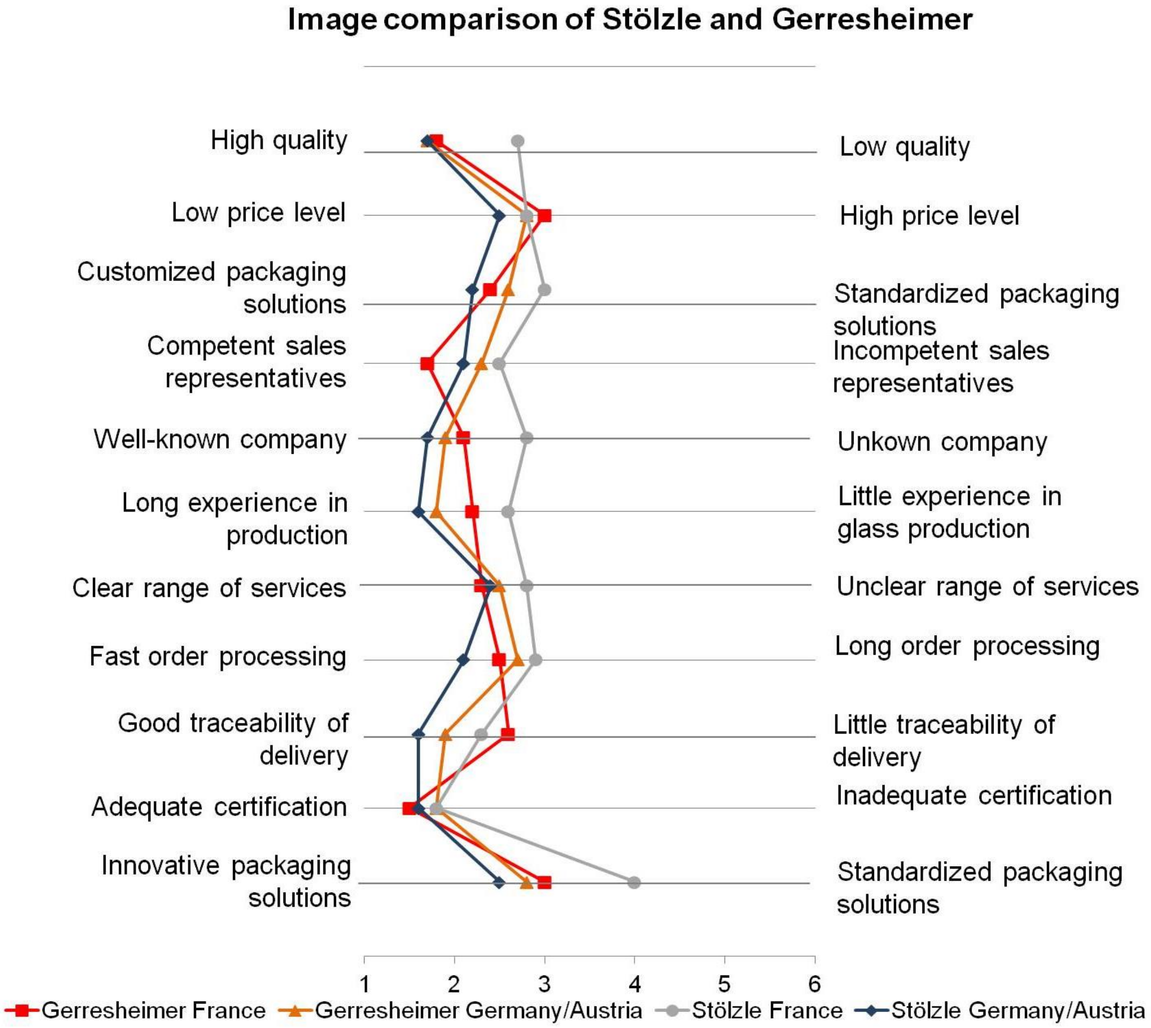


Figure A-1: Image profile Stölzle (own presentation)

The company profile has comparatively good values for 'adequate certification', 'good traceability of delivery' and 'long experience in production'. A comparatively bad value is 'innovative packaging solutions'.

The graph below shows the image profiles of Stölzle compared to Gerresheimer in the French and German/Austrian pharmaceutical market.

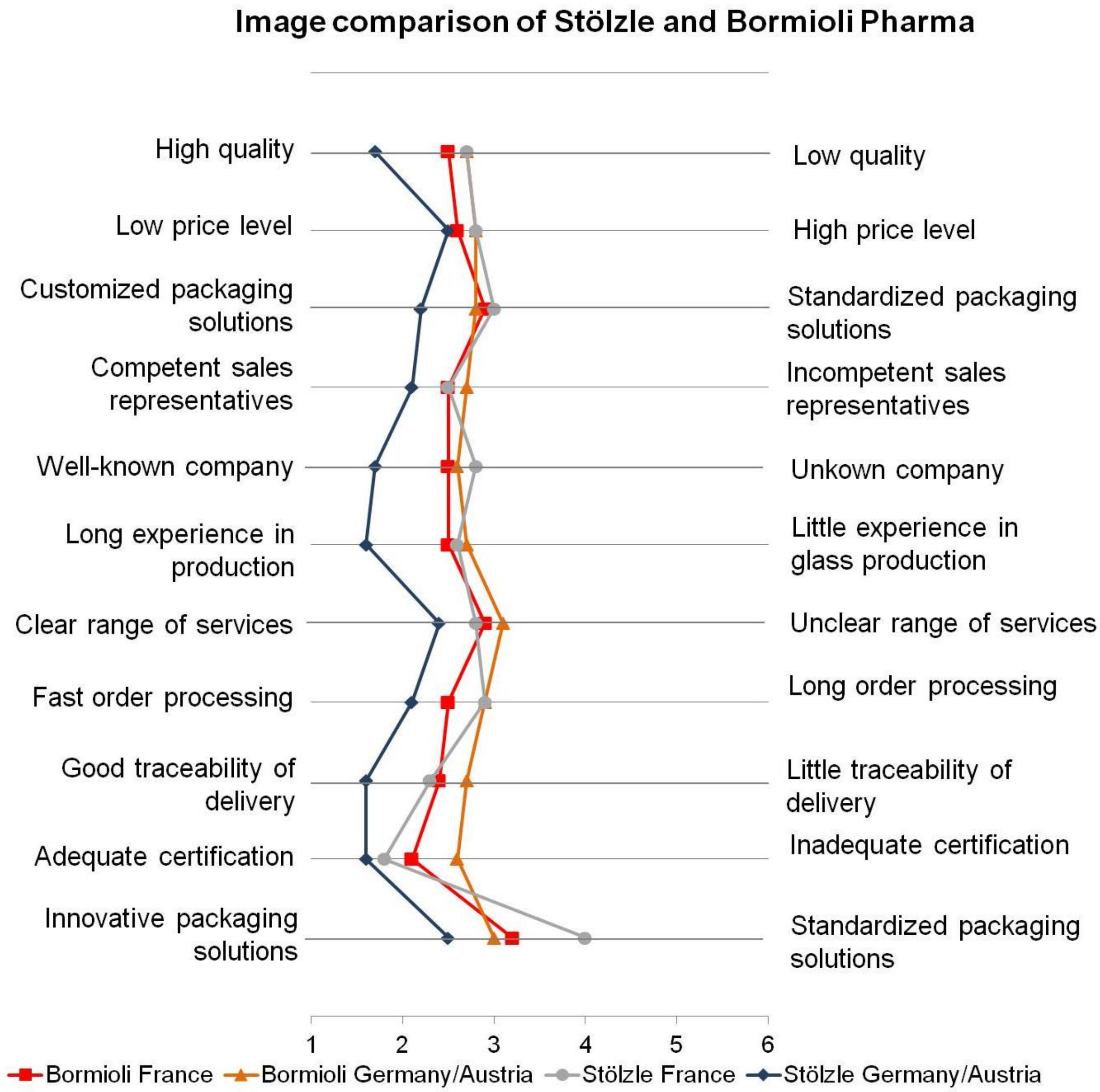


Gerresheimer France n=29 Gerresheimer Germany/Austria n=29 Stölzle France n=28 Stölzle Germany/Austria n=30

Figure A-2: Image of Gerresheimer and Stölzle in France and Germany/Austria (own presentation)

The line graph shows that Stölzle is perceived in many aspects more positively than Gerresheimer for the German/Austrian customers. But in France, Gerresheimer is assessed much better than assessed than Stölzle.

The graph below shows the image profiles of Stölzle compared to Bormioli Pharma in the French and German/Austrian pharmaceutical market.

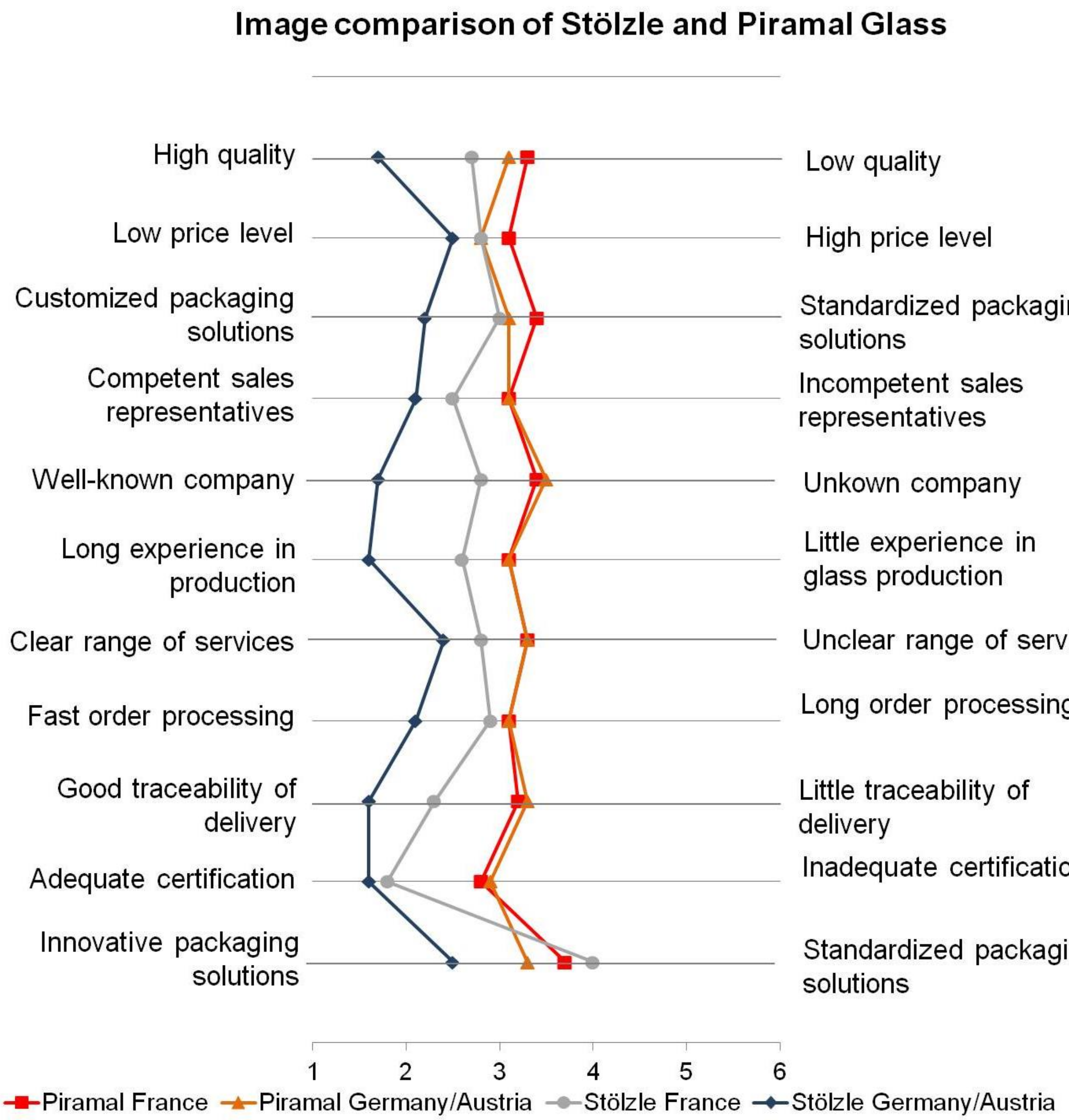


Bormioli France n=28 Bormioli Germany/Austria n=24 Stölzle France n=28 Stölzle Germany/Austria n=30

Figure A-3: Image of Bormioli and Stölzle in France and Germany/Austria (own presentation)

Stölzle has an better image than Bormoli Pharma in Germany/Austria as Stölzle is evaluated more positively in each aspect. In France, the two companies are perceived very similar with slightly differences for each aspect.

The graph below shows the image profiles of Stölzle compared to Piramal Glass in the French and German/Austrian pharmaceutical market.

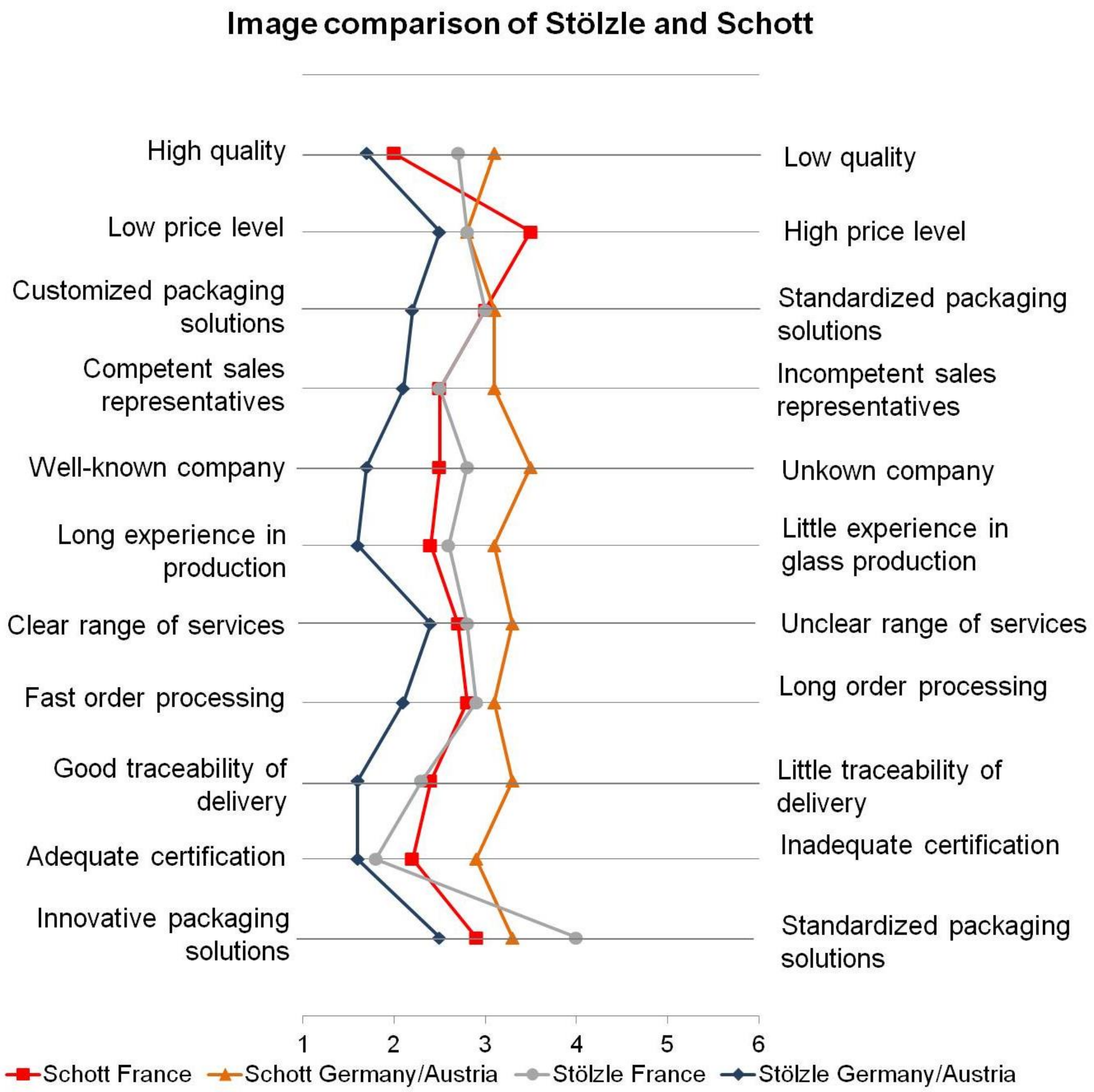


Piramal France n=16 **Piramal Germany/Austria n=12** **Stölzle France n=28** **Stölzle Germany/Austria n=30**

Figure A-4: Image of Piramal and Stölzle in France and Germany/Austria (own presentation)

As the line graph above shows, Stölzle is better assessed than Piramal Glass in the German/Austrian as well as French market.

The graph below shows the image profiles of Stölzle compared to Schott in the French and German/Austrian pharmaceutical market.



Schott France n=8 Schott Germany/Austria n=27 Stölzle France n=28
Stölzle Germany/Austria n=30

Figure A-5: Image of Schott and Stölzle in France and Germany/Austria (own presentation)

As the line graph above shows, Stölzle is better assessed than Schott in the German/Austrian as well as French market.

Main differences and specifics between countries

In this section, some differences in Stölzle's image between France and Germany/Austria are presented.

Regarding the **importance of criteria** for selecting a supplier and pharmaceutical glass packaging, some differences came up which are shown in graph A-6**.**

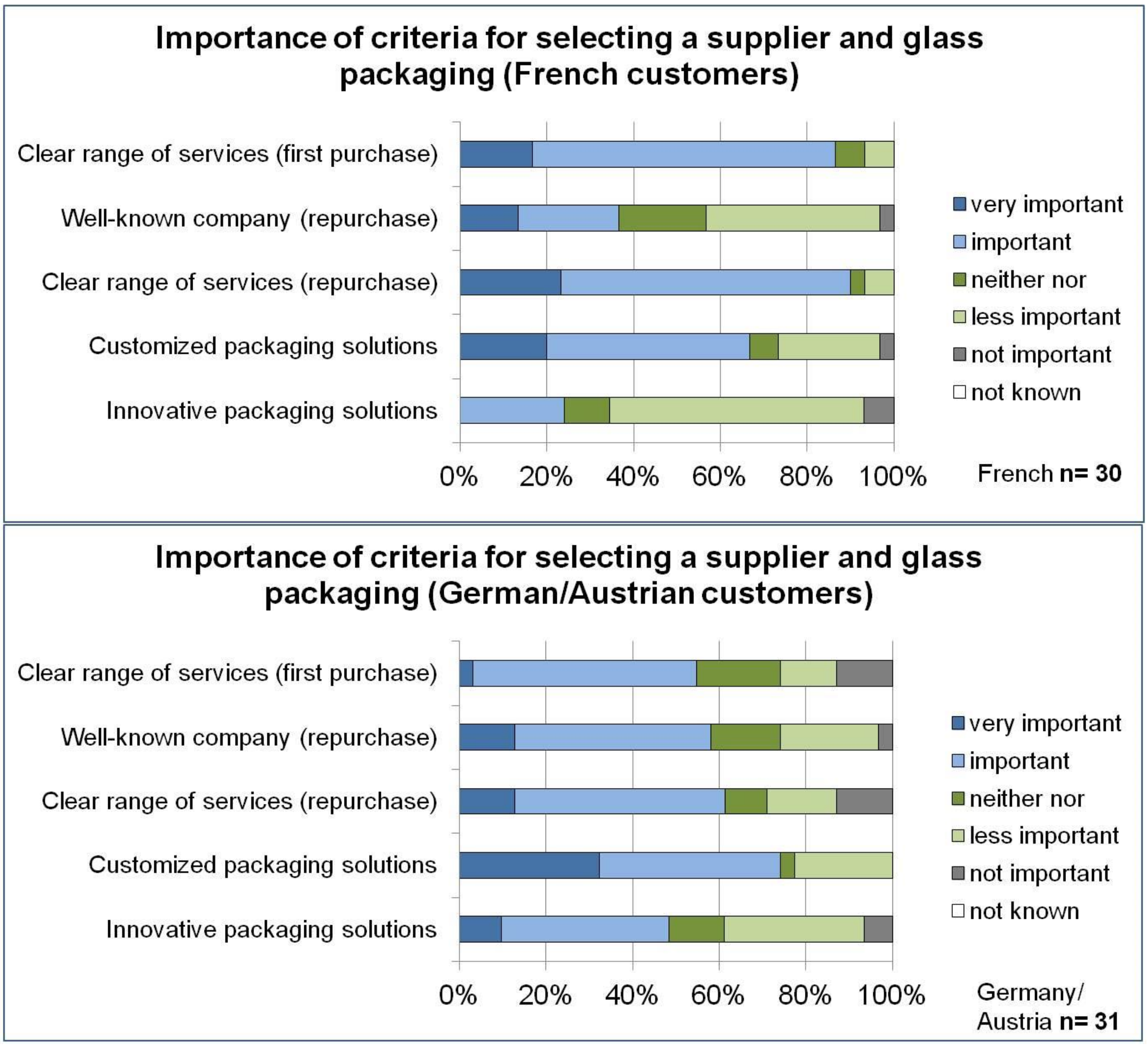


Figure A-6: Criteria for selecting a supplier & glass packaging – FR and DE/AT (own presentation)

For French customers, the 'Clear range of services' for a first purchase as well as for a repurchase is more important than for German/Austrian customers. Whereas, for German/Austrian customers the criteria 'Well-known company' is more important in the case of a repurchase. Moreover, customized and innovative packaging solutions are more important criteria for the Austrian/German customers when selecting a pharmaceutical glass packaging.

7.2 Communication

<u>Main differences and specifics between countries</u>

For the communication channels and information sources a few differences turned out. The French customers assessed the trade fairs more important than the German/Austria customers. In addition, the press articles are more important in France whereas the journals/magazines are less important.

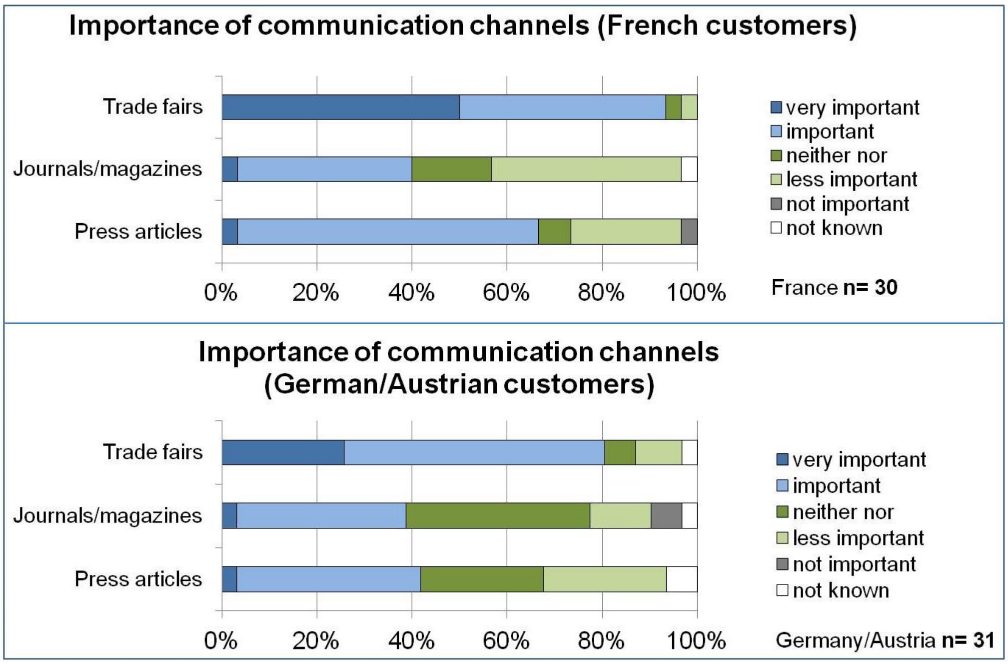


Figure A-7: Importance of communication channels – FR and DE/AT (own presentation)

Regarding the credibility of the communication channels, a difference was noticed for events. French customers assess 'Events' as more credible than German/Austrian customers.

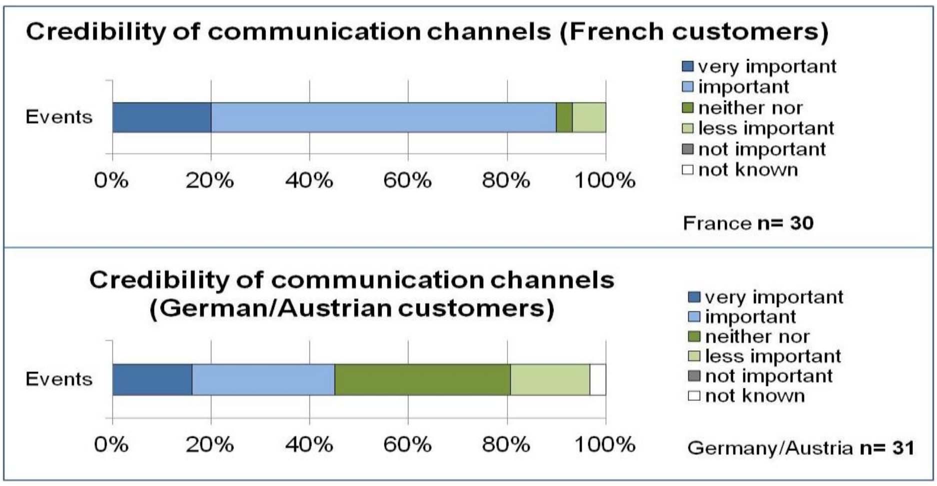


Figure A-8: Credibility of communication channels – FR and DE/AT (own presentation)

7.3 Statistical information

Figure A-9 shows the headquarters of the companies surveyed. The countries marked in green are the locations the test persons named as 'Others'.

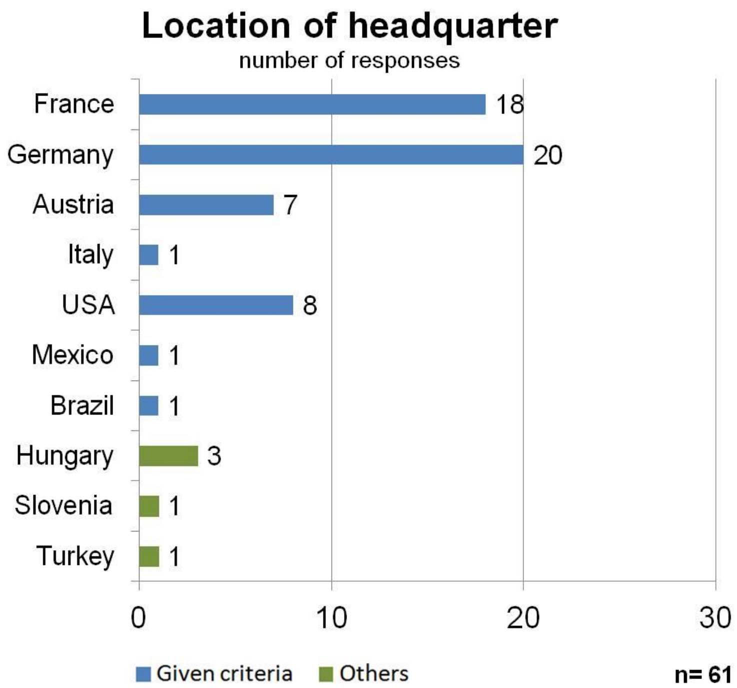


Figure A-9: Headquarter of companies surveyed (own presentation)

From the test persons, 30 work for a pharmaceutical company in France, 20 in Germany and 11 in Austria. The most participating companies (49%) employ more than 250 people, 33% between 50 and 250 people, 15% between 10 and 49 and only 3% up to 9 people.

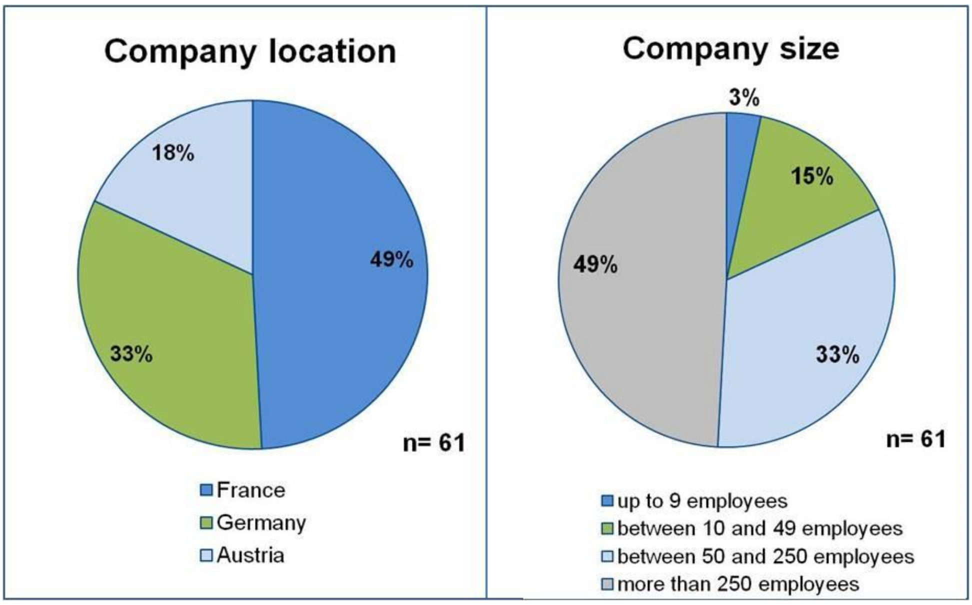


Figure A-10: Company location and size (own presentation)

Regarding the job position it turned out that the most test persons are working in the purchasing department – either as purchasing director or purchasing employee. The job positions marked in green are the positions stated at 'Others'.

Figure A-11: Job position (own presentation)

From the 61 test persons, 42 have already bought at Stölzle and 19 are potential customers. The graph below shows the distribution of customers as percentage.

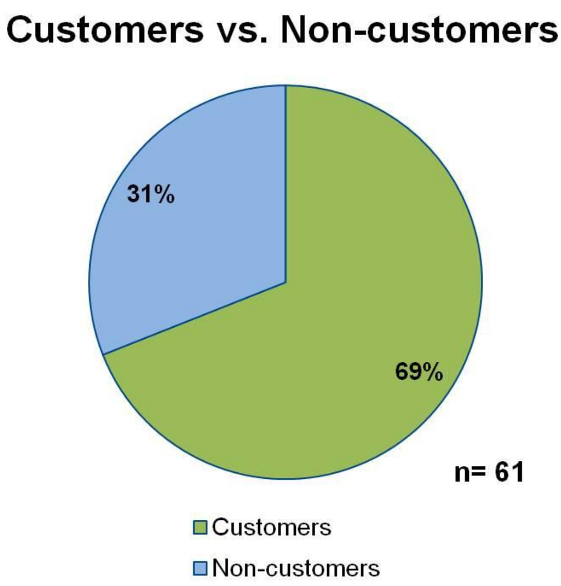


Figure A-12: Distribution of customers and non-customers (own presentation)

8 Value Benefit Analysis

8.1 Pair comparison – Sales

PAIR COMPARISON SALES	Differentiation from competition	Quality	Simplicity	Potential for repositioning competition	Durability	Product benefit	Image adjustment	Absolute Weight	Relative Weight
Differentiation from competition	X	4	7	7	5	7	3	**33**	**15,7**
Quality	6	X	7	8	8	9	5	**43**	**20,5**
Simplicity	3	3	X	6	5	7	2	**26**	**12,4**
Potential for repositioning competition	3	2	4	X	4	6	1	**20**	**9,5**
Durability	5	2	5	6	X	7	3	**28**	**13,3**
Product benefit	3	1	3	4	3	X	2	**16**	**7,6**
Image adjustment	7	5	8	9	7	8	X	**44**	**21,0**
							SUM:	**210**	**100**

Ranking

9 = much more important

5 = equally important

1 = less important

Figure A-13: Pair comparison for calculate weighting – Sales (own presentation)

8.2 Pair comparison – Marketing

PAIR COMPARISON MARKETING	Differentiation from competition	Quality	Simplicity	Potential for repositioning competition	Durability	Product benefit	Image adjustment	Absolute Weight	Relative Weight
Differentiation from competition	X	7	5	8	5	7	6	38	18,1
Quality	3	X	6	6	3	8	5	31	14,8
Simplicity	5	4	X	6	6	7	5	33	15,7
Potential for repositioning competition	2	4	4	X	5	5	2	22	10,5
Durability	5	7	4	5	X	3	5	29	13,8
Product benefit	3	2	3	5	7	X	3	23	11,0
Image adjustment	4	5	5	8	5	7	X	34	16,2
							SUM:	210	100

Ranking

9 = much more important

5 = equally important

1 = less important

Figure A-14: Pair comparison for calculate weighting – Marketing (own presentation)

8.3 Ranking and Justification of Positioning Ideas

Stölzle is the most well-experienced pharmaceutical glass packaging supplier		
Positioning Requirements	**Ranking**	**Explaination**
Differentiation	3	Highest experience makes the positioning unique
Quality	3	Long experience transfers certain level of quality
Simplicity	4	Easy to implement
Potential for respositioning	3	STO has more experience than the competition
Durability	5	Long-term
Product Benefit	2	Little benefit through experience
Image Adjustment	4	Fits well with current image - few changes needed

Stölzle is the specialist for pharmaceutical Type III packaging glass		
Positioning Requirements	**Ranking**	**Explaination**
Differentiation	4	Being the specialist makes the difference
Quality	4	Being a specialist indicates quality
Simplicity	3	Easy to implement but maybe needs a proof
Potential for respositioning	4	STO is the specialist - the competition is not
Durability	4	Mid-term to long-term
Product Benefit	3	Benefit through buying at the specialist
Image Adjustment	5	Fits very well with current image - adaption needed

Stölzle is preferred supplier for pharmaceutical Type III packaging glass		
Positioning Requirements	**Ranking**	**Explaination**
Differentiation	4	Customer statements make the difference
Quality	3	Preference shows certain level of quality
Simplicity	5	Easy to implement (customer statements)
Potential for respositioning	4	STO is preferred supplier - the competition not
Durability	3	Mid-term
Product Benefit	5	High benefit through customer recommendation
Image Adjustment	4	Fits well with current image - few changes needed

Stölzle is the next generation for pharmaceutical packaging glass		
Positioning Requirements	**Ranking**	**Explaination**
Differentiation	5	Innovation with huge differentiation potential
Quality	5	Innovation has positive influence on perceived quality
Simplicity	4	Easy to implement (promotion of lead product)
Potential for respositioning	5	STO is innovation leader - the competition not
Durability	3	Mid-term
Product Benefit	5	High benefit through innovative solutions
Image Adjustment	3	Adoption of BU presentation

Ranking: 5 = completely fulfilled 1 = not fulfilled

Figure A-15: Ranking and Justification of Alternative (own presentation)

9 Implementation of brand positioning

In this section a more detailed view on the communication measures and bigger illustrations of the timeline and budget can be found.

9.1 Communication activities for 2019

<u>Personal Selling</u>

For the French customers, personal customer contact is the most important communication measure. Thus, the sales representatives act as brand ambassadors for Stölzle and are able to easily transfer the brand's core elements to the target group. Consequently, the sales representatives have to regularly meet the customers to promote Stölzle as innovative pharmaceutical glass packaging supplier.

To create a uniform appearance at the customer, the sales person needs regular trainings and promotional materials. The trainings include detailed information of what is requested and forbidden to communicate to the customers. The promotional materials are handouts to support the sales team to develop tension for the innovation and underline the benefits of the UV print. On this way, the material helps in awakening interest and communicating the positioning content consistently.

In the case of Stölzle, the following promotional materials are recommended:

- Prepare UV print information sheets with news about the innovation
- Separate UV print leaflet after announcing the innovation
- Rework of Pharma catalogue including UV print

<u>Company website</u>

The second most important information source for French pharmaceutical customers is the company website. Thus, Stölzle should clearly communicates the core elements of the new positioning online. In addition, Stölzle has to regularly add the newest content of the UV print until the innovation is officially introduced to the market. It is also recommended to provide a newsletter registration for the customers to be supplied with the latest news of UV print.

<u>Exhibitions and Congresses</u>

The third most important communication channel are exhibitions. Trade shows are a great opportunity to address potential customers and strengthen relationships with existing ones. In addition, industry opinion leaders can be reached. For Stölzle it is advisable to participate at the following shows in 2019:

- Pharmapack Europe – Paris
- CPhI Worldwide – Frankfurt

In addition, two congresses in France are suitable for Stölzle:

- European Pharma Congress – Paris
- Pharma Science Research & Development – Paris

Trade shows and congresses are a great opportunity to announce more details about the UV print which means that at each event more information are spread to the visitors.

Press articles in journals and magazines

Press articles are an important complementary communication channel for French pharmaceutical customers. For introducing the UV print as a new standard step by step, publications in journals and magazines are very helpful to create tension. The following journals and magazines are suitable for Stölzle:

- International Journal of Pharmacy and Pharmaceutical Sciences
- European Pharmaceutical Review
- Pharmatimes
- Healthcare Packaging
- Packaging News

All these magazines are internationally distributed. There is no magazine existing which especially targets the French pharmaceutical market.

Direct mailing and sales promotion

Even if direct mailings are not very important for the French customers, it is advisable to make use of them. Direct mailings are useful for announcing the participation at trade shows, congresses and invite customers. In addition, some information of the UV print should be send out quarterly to keep the customers in touch with the topic. Thus, a little amount of direct mailings is recommended for 2019:

- Invitations for trade shows and congresses
- 'Thank you mailing' after the show including some information of UV print
- Detailed information sheet after introducing UV print officially to the market

9.2 Communication Plan for 2019

Communication Time Schedule for 2019

Month		January					February				March				April				May					June				July				August					September				October					November				December			
Week		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52
Communication activities	**Personal Selling**	PRE-SALES																																							INTRODUCTION						GROWTH					
	Sales training																																																				
	Customer visits																																																				
	Create UV print information sheet																																																				
	Create UV print leaflet (complete presentation)																																																				
	Create new Pharma catalogue																																																				
	Company website	PRE-SALES																																							INTRODUCTION						GROWTH					
	Integrate core elements of positioning																																																				
	Set up newsletter registration																																																				
	Add newest content of UV print																																																				
	Exhibitions & Congresses	PRE-SALES																																							INTRODUCTION						GROWTH					
	Attend Pharmapack Europe																																																				
	Attend Pharma Science R&D																																																				
	Attend European Pharma Congress																																																				
	Attend CPhI worldwide																																																				
	PR	PRE-SALES																																							INTRODUCTION						GROWTH					
	Journal of Pharmacy & Pharmaceutical Sciences																																																				
	European Pharmaceutical Review																																																				
	Healthcare Packaging																																																				
	Packaging News																																																				
	Direct Mailings	PRE-SALES																																							INTRODUCTION						GROWTH					
	Invitations for shows																																																				
	Thank you mailing' after show																																																				
	Information of UV print																																																				
	Send out UV print leaflet and new catalogue																																																				

Legend: fixed date independent communication activities

Table A-18: Communication Flow Chart for Stölzle – 2019 (own presentation)

9.3 Communication Budget for 2019

Budget for communication activities - 2019														
Month		January	February	March	April	May	June	July	August	September	October	November	December	SUM
Communication activities	**Personal Selling**													**€ 12.500**
	Sales training		**€ 20**			**€ 20**			**€ 20**			**€ 20**		€ 80
	Customer visits		**€ 2.400**			**€ 2.400**				**€ 2.400**			**€ 2.400**	€ 9.600
	Create UV print information sheet	**€ 300**	**€ 300**						**€ 300**					€ 900
	Create UV print leaflet (complete presentation)										**€ 740**			€ 740
	Create new Pharma catalogue										**€ 1.180**			€ 1.180
	Company website													**€ 460**
	Integrate core elements of positioning	**€ 200**												€ 200
	Set up newsletter registration	**€ 180**												€ 180
	Add newest content of UV print		**€ 20**	**€ 20**					**€ 20**			**€ 20**		€ 80
	Exhibitions & Congresses													**€ 89.500**
	Attend Pharmapack Europe		**€ 26.100**											€ 26.100
	Attend Pharma Science R&D			**€ 2.250**										€ 2.250
	Attend European Pharma Congress								**€ 4.600**					€ 4.600
	Attend CPhI worldwide											**€ 56.550**		€ 56.550
	PR													**€ 25.800**
	Journal of Pharmacy & Pharmaceutical Sciences						**€ 2.580**						**€ 2.580**	€ 5.160
	European Pharmaceutical Review			**€ 2.580**					**€ 2.580**				**€ 2.580**	€ 7.740
	Healthcare Packaging		**€ 2.580**								**€ 2.580**		**€ 2.580**	€ 7.740
	Packaging News					**€ 2.580**							**€ 2.580**	€ 5.160
	Direct Mailings													**€ 680**
	Invitations for shows	**€ 60**	**€ 60**						**€ 60**		**€ 60**			€ 240
	Thank you mailing' after show		**€ 60**	**€ 60**					**€ 60**			**€ 60**		€ 240
	Information of UV print		**€ 40**	**€ 40**					**€ 40**			**€ 40**		€ 160
	Send out UV print leaflet and new catalogue												**€ 40**	€ 40
SUM		€ 740	€ 31.580	€ 4.950	€ 0	€ 5.000	€ 2.580	€ 0	€ 7.680	€ 2.400	€ 4.560	€ 56.690	€ 12.760	**€ 128.940**

Table A-19: Recommended budget for communication activities – 2019 (own presentation)

9.4 Calculation of budget - Resource allocation

Budget for communication activities - 2019		
Communication activities	**Personal Selling**	**Resources needed**
	Sales training	1 hour per training of Marketing
	Customer visits	38 hours Sales, flight, accomodation, car
	Create UV print information sheet	8 hours of Marketing, 2 hours graphic designer
	Create UV print leaflet (complete presentation)	8 hours of Marketing, 4 hours of graphic designer, printing 300 pieces
	Create new Pharma catalogue	4 hours graphic designer, image picture of photographer, printing 500 pieces
	Company website	**Resources needed**
	Integrate core elements of positioning	10 hours of Marketing
	Set up newsletter registration	2 hours of Marketing, 2 hours graphic designer
	Add newest content of UV print	1 hour Marketing
	Exhibitions & Congresses	**Resources needed**
	Attend Pharmapack Europe	booth rental, furniture, fee for speech, equipment, travel costs
	Attend Pharma Science R&D	badge, equipment, travel costs
	Attend European Pharma Congress	booth rental, furniture, equipment, travel costs
	Attend CPhl worldwide	booth rental, stand contructor, fee for speech, equipment, travel costs
	PR	**Resources needed**
	Journal of Pharmacy & Pharmaceutical Sciences	4 hours Marketing, fee for article
	European Pharmaceutical Review	4 hours Marketing, fee for article
	Healthcare Packaging	4 hours Marketing, fee for article
	Packaging News	4 hours Marketing, fee for article
	Direct Mailings	**Resources needed**
	Invitations for shows	3 hours Marketing
	Thank you mailing' after show	3 hours Marketing
	Information of UV print	2 hours Marketing
	Send out UV print leaflet and new catalogue	2 hours Marketing

Calculation basis
1 hour Marketing = € 20
1 hour Sales = € 25
1 hour graphic designer = € 70

Flight France = € 350
Accomodation = € 100/night
Accomodation during shows = € 250/night
Car rental = € 70/day
Printing = € 1/piece
Fee for articles = € 2.500
Picture of photographer = € 400/piece

Table A-20: Budgeting of communication activities and resource allocation (own presentation)

9.5 Cost breakdown of shows - travel costs and show equipment

Shows	Travel costs (flight, hotel, working hours)	Additional show equipment
Pharmapack Europe	**Calculation for 5 Sales persons** • Accomodation for 3 nights = € 3.750 • Flights = € 1.750 • 80 working hours Sales = € 2.000 (2 days = 16 hours)	70 USB sticks (€ 4/piece) 70 STO pens (€ 1/piece) 100 Pharma catalgoues (€ 1/piece) sweets, coffee & drinks
Pharma Science R&D	**Calculation for 1 Sales person** • Accomodation for 2 nights = € 500 • Flights = € 350 • 16 working hours Sales = € 400 (2 days = 16 hours)	30 USB sticks (€ 4/piece) 50 Pharma catagloues (€ 1/piece) sweets
European Pharma Congress	**Calculation for 1 Sales person** • Accomodation for 2 nights = € 500 • Flights = € 350 • 16 working hours Sales = € 400 (2 days = 16 hours)	30 USB sticks (€ 4/piece) 30 STO pens (€ 1/piece) 50 Pharma catalogues (€ 1/piece) sweets, drinks
CPhI worldwide	**Calculation for 8 Sales persons** • Accomodation for 3 nights = € 6.000 • Flights = € 2.800 • 192 working hours Sales = € 4.800 (3 days = 24 hours)	150 USB sticks (€ 4/piece) 100 STO pens (€ 1/piece) 150 Pharma catalgoues (€ 1/piece) sweets, coffee & drinks

Calculation basis
1 hour Marketing = € 20
1 hour Sales = € 25
1 hour graphic designer = € 70

Flight France = € 350
Accomodation = € 100/night
Accomodation during shows = € 250/night
Car rental = € 70/day
Printing = € 1/piece
Fee for articles = € 2.500
Picture of photographer = € 400/piece

Table A- 21: Cost breakdown of shows - travel costs and show equipment (own presentation)