What We Will Cover Today

• Current Trends in Pharmaceutical Promotion
  – Trends by Channel
  – Activity of Top Companies

• Future of Promotion
  – Benefits and Challenges of Existing Channels
  – External Forces
  – What’s on the Horizon
    o Digital Advertising
    o Social Media

• Key Takeaways/Q+A
Encuity Research offers 20 years of primary market research experience along with powerful syndicated assets.

Campbell Alliance has in-depth industry knowledge from working with the world’s largest pharmaceutical companies in the US and abroad.

inVentiv Health allows us to leverage best-in-class clinical, commercial and consulting services across the globe to enrich the market research deliverable.

Encuity Research is a full-service market research firm backed by InVentiv Health’s global presence and Campbell Alliance’s in-depth knowledge of the biopharmaceutical and medical technology industry to bring our clients complete market research solutions.
Encuity Research Overview
Subsidiary of Campbell Alliance

Campbell Alliance is the leading management consulting firm specializing in the pharmaceutical and biotechnology industry. Our 100% focus on the pharmaceutical and biotech industry and deep therapeutic and functional area knowledge make us the ideal partner.

Campbell Alliance is organized into practice areas, each specializing in a critical industry function:

- **Brand Management**: Helps companies plan for and improve commercial performance of their brands and portfolios during all stages of the product life cycle—from pre-launch development through maturity.
- **Business Development**: Helps companies that need assistance creating business development strategies, identifying partners, prioritizing targets, evaluating opportunities, and negotiating deals.
- **Commercial Effectiveness**: Helps companies develop new commercial models and optimize their sales force through sales strategy, analytics, training, and assessment.
- **Clinical Development**: Helps clients maximize the efficiency and effectiveness of their clinical development organizations.
- **Medical Affairs**: Helps clients improve the performance of their medical affairs organizations, while also providing expert support at the product level.
- **Pricing and Market Access**: Helps clients more effectively market and sell products in an environment heavily influenced by payers through evidence generation, value proposition, pricing, reimbursement and access.

- **Market research and analytics subsidiary focused on providing answers to clients through custom qualitative and quantitative research, KOL identification and profiling, and syndicated medical and promotional audits**

- **The leading provider of specialized training programs for the pharmaceutical and biotech industry, including development of high-impact training solutions and e-course series**
Encuity Research Overview
Services Focused on Actionable Insights

You need answers that are credible, defensible, and measureable. Encuity Research services span five key areas to deliver insight when and where you need it most. Encuity Research provides a wide range of solutions to provide you with the answers you need.

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<td>▪ Physician, HCPs, Payer, Patient</td>
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<td><strong>KOL Identification</strong></td>
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<td>▪ KOL Profiles</td>
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<td>▪ Payer Influencers</td>
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## 1. Syndicated Audits—The Answer Suite™
### Medical and Promotional Audits

Encuity Research provides a wide array of premier syndicated services, with more than 20 years of experience measuring competitive promotional activity and drug / diagnosis trends.

<table>
<thead>
<tr>
<th>Medical Audit</th>
<th>Promotional Audits</th>
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| **TreatmentAnswers™**
  formerly the PDDA audit                                | Monitors why patients contact their physician and the subsequent drug and non-drug  |
|                                                         | therapies issued by physicians across disease states and therapies to compare drug  |
|                                                         | and diagnosis data                                                                  |
| **DetailAnswers™**
  formerly the PSA/HPSA, NP/PA, and MPA audits          | DetailAnswers delivers reliable estimates of competitive detailing (calls, details, |
|                                                         | minutes, frequency, and more) across office- and hospital-based physicians, as well |
|                                                         | as NPs and PAs; DetailAnswers Plus™ delivers increased detail at sub-national (client |
|                                                         | target and geographic region) levels                                                |
| **SampleAnswers™**
  formerly the SDA audit                                | Monitors drug sampling volume (boxes, packages, and units) plus coupons, rebate    |
|                                                         | cards, trial offers and co-pay cards to physician practices and estimates sample    |
|                                                         | spend using industry standard costs                                                |
| **EventAnswers™**
  formerly the PMEA audit                                | Tracks meeting and event activities of all pharmaceutical companies and their       |
|                                                         | respective products and allows quantitative analysis of event volume, expenditures, |
|                                                         | and attendees                                                                      |
| **eAnswers™**
  formerly the ePromo audit                              | Provides competitive industry insights about online promotional activity and enables  |
|                                                         | quantitative analysis of online promotions (incl. activity type, activity volume,  |
|                                                         | e-promotion spending, and reach)                                                    |
| **JournalAnswers™**
  formerly the PJA audit                                 | Provides estimates of advertising in professional medical journals and healthcare   |
|                                                         | tabloids targeting MDs and HCPs and enables quantitative analysis of ad expenditures |
|                                                         | and volume across product, class, and company levels; also offers the ability to    |
|                                                         | view ads via the online Ad Browser                                                  |
| **ConsumerAnswers™**
  formerly the DTCA audit                                 | Measures promotional spending across most media types, including television,        |
|                                                         | magazine, radio, newspaper, and outdoor advertising and gives clients access to     |
|                                                         | electronic images and videos of advertising campaigns via the online Ad Browser    |
Encuity’s Promotional Audit Suite

- Encuity tracks all key channels of pharmaceutical industry promotion

- Encuity’s total channel capture provides the flexibility to perform numerous promotional analyses, including share of voice, marketing mix, life cycle analysis and total promotion spend
Current Promotional Strategy
At $20.7 billion, the industry’s total promotional spend increased 7.6% since 2012. The majority of spend continued to be focused on detailing and direct-to-consumer advertising. Notably, event spend was up 25% since 2012 to more than $3.5 billion.

**2011 - $19.8B**
- Details: 59%
- Events: 14%
- DTC: 22%
- Journal: 2%
- E-promo: 3%

**2012 - $19.3B**
- Details: 62%
- Events: 15%
- DTC: 19%
- Journal: 1%
- E-promo: 3%

**2013 - $20.7B**
- Details: 58%
- Events: 17%
- DTC: 20%
- Journal: 1%
- E-promo: 4%

**SOURCE:** Encuity Research’s Promotional Audit Suite, Kantar Media
2013 Industry Promotion by Channel

Total Corporations’ Promotional Spending

<table>
<thead>
<tr>
<th>Industry</th>
<th>Pfizer</th>
<th>Merck</th>
<th>AZ</th>
<th>Lilly</th>
<th>Forest</th>
<th>J &amp; J</th>
<th>Abbott/AbbVie</th>
<th>Novartis</th>
<th>BMS</th>
<th>GSK</th>
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<tr>
<td></td>
<td>$20.7B</td>
<td>$2.2B</td>
<td>$1.7B</td>
<td>$1.3B</td>
<td>$1.2B</td>
<td>$1.0B</td>
<td>$934M</td>
<td>$827M</td>
<td>$780M</td>
<td>$714M</td>
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<td>% of Promotional Spending</td>
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</tr>
<tr>
<td>Industry: 20.7%</td>
<td>Pfizer: 11%</td>
<td>Merck: 11%</td>
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<td>Lilly: 11%</td>
<td>Forest: 11%</td>
<td>J &amp; J: 11%</td>
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<td>GSK: 11%</td>
</tr>
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SOURCE: Encuity Research’s Promotional Audit Suite, Kantar Media
Top Ten Corporations
Promotional Spend

Six of the top ten manufacturers saw growth in promotional spending from 2012 to 2013 led by Pfizer with 24% growth. Top products Celebrex, Lyrica and Viagra saw particular growth in DTC advertising and events to drive the increases. Despite more growth for Cialis, Eli Lilly saw a 12% drop due mostly to a 45% decrease for Cymbalta and 32% drop for Tradjenta.

SOURCE: Encuity Research’s Promotional Audit Suite, Kantar Media
Details Declining

In 2013, physician details fell 3% from the previous year. Details to NP/PAs were down 5% compared with 2012, and accounted for more than one-quarter of the industry’s total details.

SOURCE: Encuity Research’s DetailAnswers™ Audit
Average Detail Length

With sales forces declining and more physicians turning reps away at the door we are finding that those getting audiences with health care practitioners are receiving more time to detail. From 2009 to 2013 the average detail length increased from 6.36 to 7.24 minutes. Specialists time increased from 6.99 to 7.67 but NPs and PAs saw the biggest increase from 7.72 to 8.65 minutes.

SOURCE: Encuity Research’s DetailAnswers™ Audit
Meeting & Event Trends

At nearly 605,000, the industry’s meeting and event activity has increased 19% since 2012. Small group/small rep meetings continued to be the most popular (82% of events), however large group/symposium events registered the most growth (+42%).

SOURCE: Encuity’ Research’s EventAnswers ™ Audit
Note: Unspecified events are excluded
2013 is the first year in which we have seen the drug reps reported as being the primary leaders of meeting and events. Small Rep/Small Group has traditionally been the leading meeting type but physicians have always been the primary leaders. However, with cuts in marketing budgets and regulations limiting compensation for physician to lead events, reps have emerged as the primary leaders of events.

SOURCE: Encuity’s EventAnswers™ Audit
Note: Unspecified events are excluded
Direct-to-Consumer Expenditures Increase

DTC expenditures industry-wide increased nine percentage points between 2012 and 2013. Double-digit increases by Humira, Cialis, and Lyrica were among the top brands that played a part in breaking the three year downward trend in DTC spending.

SOURCE: Encuity Research’s ConsumerAnswers™ Audit, Kantar Media
Cialis continues to invest heavily in DTC which draws similar investment from rival Viagra, both products allocated about 72% of their total spend to consumer ads. Lyrica has seen heavy investment to consumers ahead of its initial pending patent expiration, something Pfizer similarly did ahead of the Lipitor expiration.
DTC Advertising
Platform Models

With the platforms in which consumers access their information and entertainment moving toward digital, mobile and streaming it is not surprising that companies are moving DTC budgets toward the web-based platforms. While a jump from 4% to 7% for internet spend may seem small, don’t be fooled as this signals a significant jump considering the costs scales of internet ads vs. their mass media counterparts in the magazine and TV worlds.

- 4.1% (2004)
- 4.5% (2010)
- 7.3% (2013)

DTC Spend
- 2004: $4.4B
- 2010: $4.3B
- 2013: $4.1B

SOURCE: Encuity Research’s ConsumerAnswers™ Audit, Kantar Media
Medical Journal Advertising

Journal ad spending remained relatively flat since the previous year with nearly $263 million, the number of journal ads remained flat as well at 15,512 ads.

SOURCE: Encuity Research’s JournalAnswers ™ Audit
ePromotion Spending Trends

Spending on ePromotion activities increased 37% in 2013 to $776 million. Virtual details’ share increased from 70% in 2012 to 75%, while spend for video details and online events remained flat at 3% and 4%, respectively.

SOURCE: Encuity Research’s eAnswers ™ Audit
Pfizer lead the industry in ePromotion spending ($65.2M), followed by Novartis and Merck ($60.5M and $59.7M, respectively). Notably, Forest and Valeant increased their ePromotion spending 152% and 94% since 2012 to reach spends of $41.9 million and $36.4 million, respectively.

SOURCE: Encuity Research’s eAnswers™ Audit
Physician-Rated Top Companies in ePromotion

With 30% of the mentions, Pfizer was named as the company having the best ePromotion activities, a title it held in 2010 with 36% of the mentions. Merck, which held the top spot last year (38%), placed second with 27% of mentions.

Top Ranked Companies in ePromotion

<table>
<thead>
<tr>
<th>Company</th>
<th>2013</th>
<th>2012</th>
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<tbody>
<tr>
<td>Pfizer</td>
<td>30%</td>
<td>36%</td>
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<tr>
<td>Merck</td>
<td>27%</td>
<td>38%</td>
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<tr>
<td>AstraZeneca</td>
<td>25%</td>
<td>20%</td>
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<td>Eli Lilly</td>
<td>20%</td>
<td>15%</td>
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<tr>
<td>GlaxoSmithKline</td>
<td>15%</td>
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<tr>
<td>Novartis</td>
<td>10%</td>
<td>10%</td>
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<td>Amgen</td>
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<tr>
<td>Genentech</td>
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</tbody>
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% of Respondents

SOURCE: Encuity Research’s eAnswers™ Audit
Predicting the Future of Pharmaceutical Promotion
Future of HCP Detailing

• Key Facts:
  – Still number on channel with a bullet, share has remained consistent between 58% to 62% over the past 10 years
  – No see visits has increased from 1 in 5 to 1 in 4
  – Reps have declined to about 65,000
    o Contract reps have grown
    o Companies report asking reps to increase call volume

• Key Roadblocks
  – Company budget cuts
  – Declining pipelines/generic erosion
  – Aging population of physicians with younger doctors more apt to engage in non-personal promotion
  – Merger and acquisition

• Keys to Future
  – As long as there are new product launches, new formulations and adverse events there will always be a need to have feet on the street
  – Digital media must not be seen as a means to replace but enhance the rep/physician interaction
  – Continue to focus on Nurse Practitioner/Physician Assistants
  – Companies need to flip the script – Discussions need to be patient or disease or outcome focused not product focused
    o Products discussions should enhance primary message around treatment
    o Expand the participation of experts (MSLs, Nurse Educators)
Future of Meeting and Events

• **Key Facts:**
  – Solidly the 3rd most utilized channel with between 15%-18% share of spend annually
  – Consistently most popular channel among physicians
  – Provides physicians greatest voice in the promotional process

• **Key Roadblocks**
  – Budget cuts threaten feasibility, especially large-scale meetings
  – Government regulation – Sunshine Act
  – Negative perception among physicians for participating

• **Keys to Future**
  – Popularity with customer base will allow companies to grow channel organically
  – Creates a means for physicians to gather and interact collectively and discuss key issues in health care
    - Key Opinion Leaders
    - Can be a proxy to associations or practitioner communities
  – Provides companies a means to control messaging for larger groups of practitioners
  – Companies must rethink how to encourage participation as regulatory bodies continue to limit perks
Future of ePromotion

• Key Facts:
  – Has settled into to a nice little niche as an alternative or supplement to traditional personal promotion by details or meetings and events. Consistently has accounted for 3% of industry spend annually
  – Continues to provide the most flexibility and convenience to physicians
  – Has become a staple in launch mix strategy

• Key Roadblocks
  – Novelty has worn off for some physicians who prefer either the more in person interaction of detailing or group participation of meeting and events
  – The ability of reps to bring digital technology along during details has limited the advantage ePromotion had to bring technology to doctor

• Keys to Future
  – Responses from Encuity’s eAnswers Annual Study show companies need to up their game in terms of ePromotion content. Too often the self-guided content doesn’t rival what reps are bringing into the offices
  – Channel needs to continue to be part of product launch strategy and become part for those who do not use ePromotion. Companies like Merck, Pfizer and J&J ingrain the importance of ePromotion by using it during launch.
Future of DTC Advertising

• Key Facts:
  – Since regulations were relaxed in the early 2000’s DTC has been the second choice for channel promotion, accounting for between 20-25% of spending annually
  – Increasing availability of audiences and effectiveness of campaigns provide the ability to educate consumers on even complex therapeutic areas and provide patients leverage with physicians on requesting medication
  – Access to high profile ad agencies and even healthcare specific ad agencies have advanced the quality and reach of DTC advertising over the past decade

• Key Roadblocks
  – Is without question the most scrutinized channel of promotion from the perspective of the government/regulatory agencies, physicians and patient advocacy
  – More susceptible than other channels to negative publicity. Continued DTC promotion in the light of issues like adverse events can damage a product’s image
  – Will forever remain budget sensitive

• Keys to Future
  – Success somewhat “pre-ordained” given that core audience continues to evolve as the key health care decision maker
  – Ability to capitalize on evolving media landscape and how consumers will get the information and entertainment
  – The need to be responsible in advertising
Future of Medical Journals

• Key Facts:
  – Journal has seen a slow decline in its share of total promotional spend for the industry from 2.5% 10 years ago to 1.3% in 2013
  – Provide pharmaceutical companies a way to address therapies and product attributes in a scientific or educational manner

• Key Roadblocks
  – Decline in new product launches coupled with a promotional focus on product/consumer marketing over science has driven the drop in share
  – Increased role of the consumer in pharmaceutical promotion has moved focus away from physician

• Keys to Future
  – Incorporation of digital platforms
  – Pharma focusing on new product development in therapy areas that may lend themselves to more of a scientific/educational promotional strategy – Oncology, Rheumatology, Biosimilars, Orthobiologics
  – Like detailing, as long as there are new product launches, clinical trial results and study findings to report, journal will still have an important role in promotion
Promotion’s New Frontier: The Digital Social Experiment
Navigating the Digital Age

• In deference to Capt. Obvious this is not a new concept, but innovations in digital platforms are making the sharing of data via technology more efficient.

• In terms of pharmaceutical promotion, digital doesn’t represent a new type or a new channel but rather a new way to enhance existing technology-based promotional tools like:
  - DTC
  - Medical journals
  - Detail Pieces/Sales Aids
  - Video/Virtual Details
  - Point of Care Promotion

• May provide the best way to harness and display the newest hot topic in the industry – “Big Data”
Digital Sales Aids

• Use of tablets, like the iPad shown below, allow reps to enhance their knowledge and disease state presentation by putting an immense amount of materials at the fingertips of the rep.

• Storing and displaying visual detail aids on a single source like a tablet benefits the rep by eliminating the need to carry cumbersome charts, booklets and hard copy detail aids. Reps can either direct the physician to a web site to view the information or share the actual app being used and not to mention the cost savings for the company.
Companies are also utilizing web and smart phone apps for reps to share with doctors for their use during and after details

- NovoNordisk’s Coags Uncomplicated provides a web-based interaction that has links to smartphone and tablets apps

- The Coags Uncomplicated app allows for the physician to analyze lab results and provides recommended diagnoses
Digital Medical Journals

- In recent years digital versions of medical journals have become available to either replace or supplement hard copy medical journals.

- Most digital versions are exact copies of their hard copy counterparts containing all content as well as product ad images.
Point of Care Promotion

Point of Care promotion in physician offices are also supplementing existing wall boards or literature by upgrading to digital platforms whether it is on flat screen monitors or tablets in the office waiting rooms.

Example of Digital POC Video

Results from 2013 Nielsen/Arbitron Study

- 38 minutes
- Over 2/3
- 84%

Source: Nielsen/Arbitron, RTI
Digital Dashboards for Big Data

- Big data is the key buzz topic in the data delivery environment currently, with companies having the needs to take disparate data sets and merge them into one platform that can also has query capability
Stamping Our Social Media Footprint
Prevalence of Social Media and Pharma

Pharma, like any other industry, has stamped their place in the world of multi-channel consumer marketing by adding to their strong position of direct-to-consumer marketing with a strong social media presence. Here is a look at where top companies are interacting:

- Pfizer: Facebook, Twitter, YouTube, SlideShare, LinkedIn
- Merck: Facebook, Twitter, YouTube
- AZ: Facebook, Twitter, YouTube, Yammer, LinkedIn
- GSK: Facebook, Twitter, YouTube, Flicker
- Novartis: Facebook, YouTube, Flicker, LinkedIn
- Genentech: Facebook, Twitter, YouTube, LinkedIn, Google+, Pintrest

However, unlike most industries, pharma has been slow to adopt social media as a legitimate channel of product promotion

- Early attempts by pharma to use social media as a promotional vehicle had significant negative results
  - Promotional posts on products were met with negative posts almost immediately and potentially cast unintended doubts on the effectiveness of medications, potentially sinking an entire multi-channel promotional campaign
  - Social media had the consequence of taking the control of the message out of the manufacturers hands
- Social Media has been primarily a source of patient advocacy, education, support and as a place to enroll in pharmacy discount programs
- In recent years companies have expanded past Facebook and Twitter to sources like Flicker, SlideShare, YouTube and even Pinterest as a place for the company to share stories on product innovation and patient success stories
Examples of Pharma Social Media

**Pfizer - Facebook**

Pfizer Global Health Fellow Betsy Benoit, left, who is serving a short-term fellowship with Population Services International (PSI) in Cambodia, shares tips on increasing provider engagement with Ngoun Sophy, a medical detailer with PSI, far right, while PSI colleague Khat Sopha helps translate. Benoit is helping to build PSI’s capacity by enhancing its medical detailers’ skills and abilities to talk with physicians.

**Merck- Twitter**

Merck’s official Twitter feed, directed to US customers only. Tweeting about our commitment to saving, improving lives, and developing.

Worldwide Trends:
- Coronavirus
- Mental Health
- Breast Cancer
- Ebola
- Alzheimer’s
- COVID-19
- Vaccine
- Coronavirus
- COVID-19

Merck - 3h
Our Boston employee volunteers served dinner to cancer patients at Children’s Hospital Boston.

Like · Reply · May 18 at 1:55pm

Klemen Zupancic: business is global matter!! :)
Examples of Pharma Social Media

**AstraZeneca - YouTube**

**Genentech - Pinterest**
Social Media Outlook for Pharma

• No real change is seen for pharma’s strategy on social media any time in the future. Currently, social media provides a real presence in the scope of education, advocacy and support which is much different from the perceived profile when promotional components are involved

• The only social media/promotional crossover we have seen is something called “digital lead generation” where pharmaceutical social media sites utilize invitations for users to link to promotion through web-based landing sites. This takes the user off the social media platform and disengages from the medium thus in theory disassociating the promotion from the social media aspect

• Currently, the environment of pharmaceutical social media has made it difficult for the industry and market research firms like Encuity to provide and real valuable insight into how social media may be influencing both patient and provider behavior because there are no input measures like rate cards to quantify cost or output

• The future of social media tracking really lies in more informal or soft measures via social listening including conversation theme, keyword monitoring, hashtags and topics, people and brand reports
Key Takeaways/Q+A

• For the most part promotional strategy has remained relatively consistent over the last decade, even seeing a decent increase in overall spend in 2013
  – Detailing remains the number source of promotion even with continued downsizing in rep counts
    o Higher rates of “no sees” but average length of detail on the rise
    o Reps have learned to flip the script and reinvent their messaging
  – Key channels like DTC and events saw a resurgence in 2013
    o Big companies continue to spend big on DTC budgets – Humira, Cialis, Viagra, Lyrica
    o Internet DTC gaining foothold as key media type
    o Several key launches drove event spend

• Digital has emerged as a key buzz word for promotion, with companies looking to enhance various aspects of technology-enabled promotion with new digital capabilities and platform

• Social media remains an enigma as companies continue to utilize the medium for education, advocacy and support but the sheer number of consumers and doctors utilizing social media for information purposes are pushing companies to look at ways to interpret activity
Contact Information

If you have questions about the information provided or want to learn more about Encuity’s Audit Suite™, please contact Jason Fox:

<table>
<thead>
<tr>
<th>Jason Fox</th>
<th>267-756-1761</th>
<th><a href="mailto:jfox@encuity.com">jfox@encuity.com</a></th>
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</thead>
<tbody>
<tr>
<td>Director, Client Services</td>
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