

2007 TRENDS

Top 7 Healthcare Issues

90% of Americans believe that greed is a major reason that U.S. healthcare costs are rising, a greater number than those citing drug prices, care for the uninsured, business inefficiencies, or malpractice costs.

This year is expected to be a watershed period for the health industries, according to PricewaterhouseCoopers LLP, as health savings accounts reach a tipping point, states act where the federal government hasn't, and pressure on pricing amid demand for transparency forces pharma companies, hospitals, and health plans to rethink their strategies.

1 STATE INITIATIVES. In the presence of federal gridlock, states are taking the lead on divisive issues, such as stem-cell research, health insurance cover-

age for the uninsured, and oversight of advertising and promotion by pharmaceutical companies.

2 TRANSPARENCY. The demand for transparency around pricing, quality measures, safety standards, and community benefit is being driven by, and is supportive of, consumer-directed healthcare and pay-for-performance.

3 TECHNOLOGY. Developing a digital backbone to support electronic health records, interoperability, and transparency is a national priority, but the public mandate is unclear and the industry is struggling with the cost and ROI.

4 CONSUMERS. The shift toward consumer-driven healthcare as a way to control costs will continue; the year ahead will be the tipping point for HDHPs and HSAs.

5 PRICING. Forty-two blockbuster drugs will lose their



patents in 2007, opening the door to generic equivalents and potentially creating a loss of revenue for brand name pharmaceutical manufacturers.

6 OBESITY. There is a culture shift around healthy eating sweeping the United States, as evidenced by the number of fast-food chains cutting out trans fats and U.S. companies introducing health and wellness programs.

7 PROVIDERS. The competitive landscape will change as healthcare gets smaller, more focused, and patient friendly under consumer-directed healthcare. Physicians and

hospitals are now competing with retailers, several of which have announced plans to open mini-health clinics within their walls.

CORPORATE RECOGNITION

HBA Serves Up an ACE

The Healthcare Businesswomen's Association (HBA) is recognizing corporate initiatives and programs that support women's advancement in the industry with a new program called the ACE Award, which signals Advancement, Commitment, and Engagement.

Healthcare companies and organizations are invited to submit applications, which are available at hbanet.org; deadline for submissions is the end of March. Finalists will be announced in mid-2007 and winners will be named at the November 2007 HBA Leadership Conference in Washington, D.C.

The ACE award-winning initiative will be judged against five criteria: measurable results and impact on target population; degree to which it supports the overall business; stewardship; effectiveness of the execution; and built-in sustainability.

The initiative need not be dedicated exclusively to women, and it may target broader corporate culture changes.

SOURCE: PRICEWATERHOUSECOOPERS, NEW YORK

TV GUIDE The Best TV DTC Ads

IAG Research reveals the best new prescription drug ads that first aired during this past television season, revealing some of the best-in-class prescription drug branded advertising since the DTC launch 10 years ago.

Sepracor's sleep aid Lunesta not only topped the charts as the most memorable ad but it also achieved status as the most recognized drug brand advertised on primetime TV.

Top 10 DTC TV Ads			
RANK	BRAND	COMPANY	AD BRIEF
1.	Lunesta	Sepracor	Lunesta bedtime story
2.	Lunesta	Sepracor	Why's my mind so restless? Can anything help?
3.	Zelnorm	Novartis	Women's abdomens, "if you just mention constipation to your doctor..."
4.	Zelnorm	Novartis	Men and women's abdomens, "I need something different."
5.	Nasonex	Schering-Plough	Animated woman sneezes and a bee talks to an owl
6.	Boniva	GlaxoSmithKline/Roche	Four women on the edge of a SUV
7.	Vytorin	Merck/Schering-Plough	Plates of food dissolve into portrait style shots of relatives
8.	Fosamax	Merck	Doctors say ask me about bone loss
9.	Valtrex	GlaxoSmithKline	Up to 70% of people who had genital herpes got it from their partner
10.	Nasonex	Schering-Plough	Animated bee sniffs blue flower in a field

For the complete list of top 10 most recalled new prescription drug ads and brands, visit iagr.net/data_overview.jsp.

SOURCE: IAG RESEARCH, NEW YORK

SOURCE: HEALTHCARE BUSINESSWOMEN'S ASSOCIATION, FAIRFIELD, N.J.