

Awards

CHANDLER CHICCO CO-FOUNDER RECEIVES SABRE AWARD

Bob Chandler, principal and co-founder of the Chandler Chicco Companies, part of inVentiv Health, received a SABRE Award for Individual Achievement. Mr. Chandler received the award, which honors the exceptional work of public relations professionals, in recognition of his vision and his leadership. He is one of three award recipients this year.

OGILVY COMMONHEALTH HONORED BY LLS

Ogilvy CommonHealth's Beth Wiesner, director of editorial services at the organization's group Carbon, was named 2010 Woman of the Year by the Lymphoma & Leukemia Society (LLS). Ms. Wiesner raised more than \$57,000, which goes toward research and financial aid for patients who cannot afford medication.

FERGUSON WINS OTC AWARD

Ferguson, an Ogilvy CommonHealth agency, won a Silver award at the OTC National Advertising Awards. Ferguson earned the award in the Best Branded Print Campaign category for an OTC conversion launch ad for a heartburn treatment.

GOBLE WINS CREATIVE AWARDS

Goble & Associates won three awards from the

Summit Creative Awards competition. Silver awards were awarded for the Asthma Resource Kit created for Phadia and the "Human Perspectives" Technology video created for Hospira. A Bronze award was given to the Hospira "Human Perspectives" Integrated Print/Video Campaign. The agency also picked up three awards for Phadia at the DxMA's annual Creative Communications Awards Program. Goble took home two awards in the first year of the American Pixel Academy's Fexy Awards competition. The website created for Sakura Finetek USA took home a Platinum Fexy Award and the "Human Perspectives" Campaign for Hospira earned a Gold Fexy Award.

IGNITE HEALTH WINS DOSIE AWARDS

Ignite Health was awarded two Dosie Awards from Dose of Digital for the best examples of social media in healthcare. Juvenation.org, a website for the Juvenile Diabetes Research Foundation, was awarded Bronze in the Best Patient Community (non-branded) category. The agency's work for Roche's Accu-Chek Diabetes Link community was recognized with a Bronze Dosie Award in the Best Brand-sponsored Patient Community category. Ignite developed a "Nest Widget" for Roche's site that features tweets from influential health activists in the online diabetes space.

Healthcare Costs

Employers Experience Cost Increases

The nation's employers can expect medical costs to increase by **9%** in **2011**, a decrease of 0.5% from the **2010** growth rate, according to the annual Behind the Numbers report published by the PricewaterhouseCoopers (PwC) Health Research Institute. For the first time, the majority of the American work force is expected to have a health insurance deductible of **\$400** or more, as more employers return to "indemnity style" cost-sharing by raising out-of-pocket limits, replacing co-pays with co-insurance, and adding high-deductible health plans.

Other findings:

- **41%** of companies intend to



increase medical cost-sharing, including higher deductibles and co-pays, while only **26%** intend to increase prescription drug cost-sharing.

- Employers are moving toward pre-managed care benefit design by increasing deductibles and replacing co-pays with co-insurance. The number of employers using co-insurance for physician visits has almost doubled, and one-third use co-insurance for brand-name drugs.

SOURCE: PRICEWATERHOUSECOOPERS

TUNING IN...

Featured Podcast

 **Best Practices for Sites and CRO Collaboration**

Featured Thought Leaders: Ed Jahn and Jamie Hudak, Criterium

Featured White Paper


 **In-Depth Analysis of the U.S. Mid-Level Practitioner Market and the Opportunity it Represents**, sponsored by Snowfish LLC

Featured Webinars

 **Improving Trial Outcomes: How Organizations Can Leverage E-Clinical Integration for Reducing Costs and Gaining Efficiency**, sponsored by Aris Global

 **Getting It Right in the Emerging Markets: Identifying the Opportunities and Avoiding the Pitfalls in Conducting Market Research in New Geographies**, sponsored by Kantar Health

Featured Videos

 **Editor's Take Videos**, taped at the DIA 46th Annual Conference

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accelerate your vision

Global Market

Growth of 4% to 6% Predicted

The size of the global market for pharmaceuticals is expected to grow almost **\$300 billion** over the next five years, reaching **\$1.1 trillion** in **2014**, according to IMS Health. The **5% to 8%** compound annual growth rate during this period reflects the impact of leading products losing patent protection in developed markets, as well as strong overall growth in the world's emerging countries.

Global pharmaceutical sales growth of **4% to 6%** is expected this year, consistent with IMS's prior forecast. In **2009**, the market grew **7.0%** to **\$837 billion**, compared with a **4.8%** growth rate in **2008**.

In its latest analysis, IMS identifies the following key market dynamics:

- Geographic balance of the pharmaceutical market continues to shift toward pharmerging countries. Pharmerging markets are expected to grow at a **14% to 17%** pace through **2014**, while major developed markets will grow **3% to 6%**.
- The U.S. will remain the single largest market, with **3%** to

6% growth expected annually in the next five years and reaching **\$360 billion** to **\$390 billion** in **2014**, up from **\$300 billion** in **2009**.

- Higher growth will occur in those therapy areas where there is significant unmet clinical need, high-cost burden of disease, and innovative science that can bring new treatment options to patients. In the areas of oncology, diabetes, multiple sclerosis, and HIV, annual growth is expected to exceed **10%** through **2014**.
- Broad cuts in spending applied by public payers to reduce growth in drug budgets. Publicly funded health systems are under increased pressure to reduce growth in drug budgets following the global economic downturn.
- Over the next five years, products with sales of more than **\$142 billion** are expected to face generic competition in major developed markets. Collectively, the impact of patients shifting to lower-cost generics in major therapy areas will reduce total drug spending by about **\$80 billion** to **\$100 billion** worldwide through **2014**.

Funding Environment

Venture capital (VC) funding in the life-sciences sector, which includes the biotechnology and medical-device industries, captured the highest percentage of VC dollars invested during the first quarter of **2010**, according to the PricewaterhouseCoopers and NVCA MoneyTree Report, based on data from Thomson Reuters. Life sciences funding for Q1 **2010** totaled **\$1.3 billion** in **160 deals**, which represents **28%** of all venture dollars invested and **23%** of total deals during the quarter.

Despite capturing the largest percentage of total dollars invested, life-sciences investments dropped when compared with Q4 **2009**, when **\$1.8 billion** was invested into **202 deals**. This represents a decline of **26%** in dollars and **21%** in deals from Q4 **2009**. The first quarter of 2010 reversed an upward trend in deal activity, which had grown for three previous quarters.

- For all sectors, venture capitalists invested **\$4.7 billion** in **681 deals** in the first quarter, a decline of **9%** in terms of dollars and

18% in terms of deals, compared with the fourth quarter of **2009** when **\$5.2 billion** was invested in **832 deals**.

- The investment split for the life-sciences sector in the first quarter of **2010** remained consistent with previous years. Biotechnology accounted for **61%** of dollars with **\$825 million** going into **99 deals**.
- Both early- and later-stage funding decreased in terms of dollars from the previous quarter. In Q1, later-stage funding decreased by **11%**, and early-stage investments decreased by **36%** from the prior quarter.
- Early-stage investments in the biotechnology sector outpaced later-stage funding, continuing a four-quarter trend.
- Three of the seven biotechnology subsegments exhibited growth in the first quarter. Industrial biotechnology grew from **\$22 million** in the last quarter of **2009** to **\$81 million** in the first quarter of **2010**.
- Biotechnology research grew from **\$19 million** to **\$34 million** during the most recent quarter.

SOURCE: IMS HEALTH

SOURCE: PRICEWATERHOUSECOOPERS AND NVCA MONEYTREE REPORT

Financial Performance

Biotech Industry Shows Resilience

The global biotechnology industry was able to weather the continued worldwide economic turmoil and deliver a strong financial performance in 2009, with the world's established biotech centers reaching profitability for the first time in history. But the gap between the haves and have nots in the industry continued to widen in **2009**, posing new challenges for emerging companies in accessing the capital needed for R&D, according to Ernst & Young.

Key financial results:

- Companies in the established biotech centers of the U.S., Europe, Canada, and Australia had an aggregate net profit of **\$3.7 billion** in **2009**, an improvement from the **\$1.8 billion** net loss in **2008**.

- Revenue of listed biotech companies fell by **9%** to **\$79.1 billion** in **2009** from **\$86.8 billion** the prior year. This was due to the exclusion of Genentech in **2009** as a result of its acquisition by large pharmaceutical company Roche. If Genentech is excluded from both years, industry revenues would have grown by **8%**.
- Capital raised increased sharply in **2009**. Companies in the U.S., Europe, and Canada raised **\$23.2 billion** in **2009**, a **42%** increase compared with **2008**.



SOURCE: ERNST & YOUNG



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