

» MARKETING TRENDS

TRENDS:

WHAT WAS OLD IS NEW AGAIN

Pharma marketers face the same longstanding challenges — with a new twist — in the coming years.

Patients, ROI, an evolving landscape, and so on have been on the minds of marketers for years; but today success will lie in new solutions and approaches to overcome these chronic issues through innovative technologies and adaptive strategies.

PATIENTS TAKE CENTER STAGE

Our experts tell us that the industry is moving back to its roots as it puts the patient front and center — and this is true in marketing as well as in science. To meet the needs of the ever-savvy consumer, marketing strategies, messages, and channels will need to change to fit the needs of the patient.

According to Sanjeev Wadhwa, director, life sciences R&D, CSC, the traditional marketing model focuses on identifying unmet clinical need, and pharma companies need to turn their attention instead to understanding what patients value and how to influence them.

He says the same paradigm is empowering patients and their advocacy groups to launch networks that would focus on discovery of drugs that might be beneficial for their comorbidities. Leveraging these capabilities patients can harness their own genomic data to self-generate their disease models, identify novel treatments and work with their providers in a highly involved manner — a true patient-centric revolution.

“Patient expectations are rising and they are taking much more control over their choice of treatment, behaving like traditional consumers,” Mr. Wadhwa says. “They are likely to place a greater value on softer elements of a care offering, such as convenience, for example.”

With mass marketing quickly becoming a relic of the industry’s heyday, a number of the

Dr. Leo Francis

Publicis Medical Education Group

“Marketers, from their end, will be called on to demonstrate greater evidence of the value of their treatments to both patients and payers seeking the best and most cost-effective therapies.”

**Jon Hudson**

MedThink Communications

“Tracking and analytics now allow companies to reach a specific individual with highly personalized messages.”

approaches, including physician segmentation and product positioning, will become much less relevant unless they adapt to the changing times, says Harris Kaplan, CEO of Healogix.

“Patient centricity will replace product centricity,” Mr. Kaplan says. “What physicians, payers, and patients care about is extending or improving quality of life and obtaining value. Marketers will have no choice but to wrap their messages in evidence around that framework.”

This is what Sydney Clark, VP, practice



leader, commercial effectiveness, at IMS calls offering solutions that go beyond the pill. Historically, pharma companies have integrated vertically through the drug path, handling research, development, manufacturing, and commercialization.

“We believe that going forward pharma will have a different type of vertical integration, one that is focused on the customer and on the disease path — prevention, diagnosis, treatment, and compliance,” Mr. Clark says. “Pharma will seek out total disease solutions, offering services along the new continuum. This will have significant implications to brand teams and how they develop their products and services along their life cycle.”

According to Leo Francis, Ph.D., president of Publicis Medical Education Group, the increasing role of patients in shaping health-care will have a major impact on marketing, and this will affect all stakeholders, from

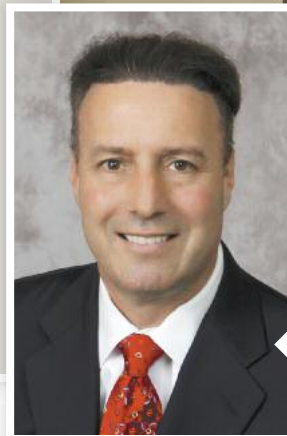
John Ross
SDI

"Biopharmaceutical companies are already taking advantage of new ways to reach physicians and consumers, such as through mobile devices and social media sites; however much of this marketing is new and unregulated."

Barry Schmader

Dudnyk Healthcare Group

"There is the potential for the social media model to fill the gap left by a departing sales force, if channeled in the proper way."



Robert Previdi

PSKW and Associates

"As the world becomes increasingly more oriented toward mobile communication, pharmaceutical marketers who leverage mobile communications will be more successful in creating in-depth relationships with physicians and patients."

PATIENTS MOVE INTO POWERFUL POSITIONS

When it comes to new medicines, 32% of biopharma leaders think patients will be influential in the success or failure of new drug therapies over the next five years.

Patients are emerging as an increasingly strong group when it comes to influencing the success and failure of new drugs, according to a report by Quintiles that determines the opinions of biopharma executives, managed care executives, and patients.

According to the survey, almost one-third (32%) of biopharmaceutical executives think patients will be very or extremely influential in the success or failure of new drug therapies over the next five years.

However, patients apparently are unaware of their power, as only 11% reported that they will influence which new prescription drugs are available over that same time period.

Discrepancies between the views of patients and those in the industry don't end there. Only 6% of biopharma executives believe that patients show their influence most by choosing lifestyle or holistic approaches, while 45% of patients report they have made lifestyle changes within the past five years to avoid taking prescription drugs.

Source: Quintiles. For more information, visit quintiles.com.

physicians and healthcare professionals to payers and health systems.

"Patients will also become increasingly involved in improving healthcare systems, providing input and feedback on the value of treatments and protocols, as we anticipate the emergence of greater community-based services," Dr. Francis says. "Marketers will be called on to demonstrate greater evidence of the value of treatments to both patients and payers seeking the best and most cost-effective therapies."

As patients continue to take greater control of their health, the importance of listening, responding to, and being in continual dialogue will be critical, and the industry's educational approach must evolve to effectively support these areas, Dr. Francis adds.

"Better patient education programs will continue to aim toward improving patient care and retaining wellness, helping sufferers understand the implications of their disease and treatments to prevent or slow its progression," he says. "We will also see a greater trend in patients and consumers adopting behaviors that improve their wellness or health status rather than a sole focus on managing illness."

New patient behaviors include more and more online engagement, says Jay Bolling, CEO and president of Roska Healthcare.

"E-patients will become more commonplace, and Brand 2.0 will come to life in the healthcare space when e-patients control the brand through their interactions with one another in the social ecosystem," he says.

THE MOBILE ELEMENT

The more patients engage online through the use of new technology in the digital space, the more places there are to reach them and meet their needs. The advent of mobile health will open a communication channel that almost everyone has access to. Almost 90% of Americans have mobile phones, so marketers say what's not to love about mobile marketing.

Nick Colucci, president and CEO, Publicis Healthcare Communications Group (PHCG), says the industry is approaching "mHealth's moment."

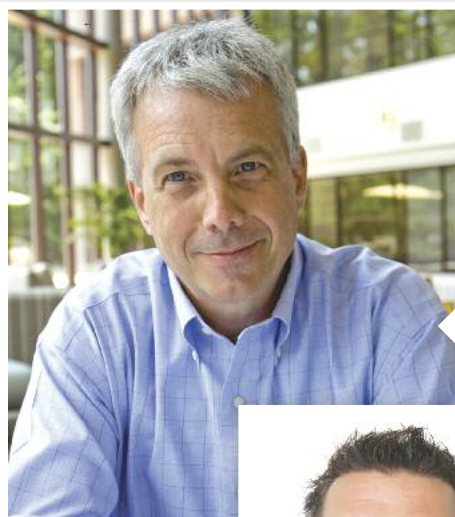
"Mobile is going to continue to grow and be a huge part of peoples' health lives," he says. "This is more than developing apps for the iPhone; it is understanding consumers' decision trigger points and offering value to help make those decisions."

"As the world becomes increasingly more oriented toward mobile communications, those pharmaceutical marketers who leverage mobile communications will be more successful in creating in-depth relationships with physicians and patients, which in turn helps marketers drive improved trial, persistence, and compliance for their brands," says Robert Previdi, president and CEO of PSKW and Associates.

Nick Colucci

Publicis Healthcare Communications Group

"Mobile is going to continue to grow and be a huge part of peoples' health lives."



John Marchese

Sudler & Hennessey

"Letting customers control the message is a concept that conflicts with our highly regulated industry."



The use of mobile for health will also help improve data collection that can be used to better target marketing efforts.

According to John Blakeley, executive VP at ERT, a new trend on the horizon will be "efficacy marketing."

"Over time, I believe the industry will become much smarter in the way it gathers postmarketing data from patients and in this respect I believe telehealth will begin to play a role in how drugs are marketed," Mr. Blakeley says. "In the future, drug companies will sponsor telehealth initiatives, which will be used to gather data proactively about the prescribing habits of physicians and the resulting effect of those prescription decisions on patients."

Mr. Previdi predicts that digital marketing will play a much more significant role in the coming years.

"More people will have Internet access at home and away from home and the popularity and necessity of digital communications will continue to increase," he says. "As a result, marketers will need to continually evaluate their marketing mix to ensure that they are reaching the right target audience with the right message via the right medium."

By using digital channels, marketers are evolving from broadcasting communications



Jay Bigelow

MicroMass Communications

"Brand managers can no longer put promotional programs together by communicating with disparate audiences and providing divergent — or worse, conflicting — messaging, which not only creates muddy brand messages, but wastes investment dollars."

efforts to personalizing them to a level never before seen, says Jon Hudson, VP, digital and media services, MedThink Communications.

"Tracking and analytics allow companies to reach a specific individual with highly personalized messages," he says.

Mr. Hudson also raises a red flag about the increasing concern of privacy issues and how that might play out in the future.

"Because of the high level of tracking, privacy issues, especially when it involves health-care, will become a growing concern for consumers, to the point where Congress may step in to develop a mechanism to address these concerns," Mr. Hudson says. "Imagine a universal opt-out or a customizable privacy settings application that applies to digital communications."

Joe Kuchta, president and CEO of GA Communication Group, says while the industry needs to embrace technology, it also needs to keep its eye on the prize: creating the right message for the target.

"The industry is in a prolonged honeymoon phase with the new digital technology, social and mobile media, and the 'we've-got-an-app-for-that' world," Mr. Kuchta says. "Once the novelty wears off, it will be critical to use these channels to do what we have always done as marketers: build the right story for the right audience to compel them to take action."

Technology is definitely changing the channel mix, Mr. Clark says. Many companies are still testing out new approaches in electronic channels, be it one-to-one CME inter-



Dr. Ahnal Purohit

Purohit Navigation

"The needs of the specialty brand target audiences are quite different and require specialty thinking."

actions with physicians, or through communications with patients in social networks.

"As the technology develops and as regulatory frameworks are put in place, these channels shall gain increasing clout and share of marketers' budgets," he says.

As the stage is set for the use of social media, brands will have to determine how to effectively use this channel that allows consumers to control the message, says John Marchese, executive VP and director of account services at Sudler & Hennessey, adding that physicians and patients have already shown a high level of social adoption when it comes to discussing disease states and treatments.

"Physicians have always appreciated sharing clinical information with one another," he says. "And patients usually have a sense of community with fellow sufferers. Those two insights prove that social media is a ripe communication method for this industry. However, letting customers control the message is a concept that conflicts with our highly regulated industry."

What will cut through the clutter is a brand that understands how to keep content fresh, he says. Whether that means a robust clinical trial program, an engaging patient relationship program, or a dinner meeting series, target audiences will be looking for something new.

"This principle especially applies to the digital space, where content must always be fresh to ensure success," Mr. Marchese says. "This will have a major impact on marketing plans moving forward as it will be less and less about ideas that provide short-term solutions, and more about looking for ways to keep communications compelling over time."



Sydney Clark

IMS

“Moving forward, pharma will go through a vertical integration, one that is focused on the customer and on the disease path — prevention, diagnosis, treatment, and compliance.”

The use of new technologies in the pharma marketing space will continue to increase as both physicians and patients increase their uptake of the practice and with that will come increased scrutiny from regulatory agencies and the discerning public.

“Biopharmaceutical companies are already taking advantage of new ways to reach physicians and consumers, however much of this marketing is new and unregulated,” says John Ross, chief operating officer, SDI. “As marketers and regulators become more familiar with these media, we’re likely to witness increased use of new marketing tactics and greater scrutiny of content.”

NEW STAKEHOLDERS, NEW STRATEGIES

The tectonic plates of power in healthcare among pharma, payers, patients and physicians are shifting — with payers and patients increasingly on top. To survive and even benefit from this change, pharma marketing will forever be changed as it transitions to align its strategies with the new stakeholders and their responsive influences.

“Marketing will have to become increasingly multidimensional and microscopic,” Mr. Kaplan says. “The changing landscape of who is in control of prescribing and paying for medications is going to add a big wrinkle to the already difficult job of reaching the right audience with the right message. In today’s world, physician willingness to prescribe is necessary but not sufficient, and payers and patients have to be willing to pay. Marketing teams need to integrate all stakeholders and then multiply this across 10 geographic markets.”

Mr. Kaplan uses the phrase “stra-tacticians” to describe the new role of the pharma marketer. Strategy that cannot be effectively executed is worthless, he says, making the

MHEALTH BY THE NUMBERS

As patients gain more control of their health and smart phones applications allow for immediate data collection and interaction in real time, mHealth is a trend that will take the next few years by force.

The results of a PricewaterhouseCoopers’ survey of 2,000 consumers and 1,000 physicians regarding their use and preferences for remote and mobile health services and devices indicates the coming trend is upon us.

Consumer Insights

- 56% of consumers say they like the idea of remote healthcare, and 41% would prefer to have more of their care delivered via a mobile device.
- 40% of consumers said they would be willing to pay for a device and a monthly subscription fee for a mobile phone application that would send text and e-mail reminders to take their medications, refill prescriptions, or to access their medical records and track their health.
- 40% of consumers would be willing to pay for a remote monitoring device and a monthly subscription that would send data automatically to their doctor health information such as heart rate, blood pressure, blood sugar, and weight.
- 31% of consumers said they would be willing to incorporate an application into their existing cell phone or smart phone to be able to track and monitor their personal health information.
- 27% of consumers said they would find medication reminders sent via text to be helpful, and men are twice as likely as women to say they would use a mobile device for health-related reminders.

Source: PricewaterhouseCoopers. For more information, visit pwc.com/us/mhealth.

standard HCP-consumer-payer plan outdated.

“The best marketers will develop strategies tied to specific opportunities with stakeholder plans and marketing expenditures tied together,” he says. “The result: greater efficacy and accountability.”

With significant changes to sales operations, including reduced field forces and new compensation structures, marketers will need to find ways to segment and cover their target audiences via a mix of personal and non-personal promotion, closed-loop marketing, and other techniques designed to maximize their promotional investments.

“Implementation of new commercial models will be crucial to future success,” Mr. Ross says.

According to Mr. Kuchta, marketers who

Physician Insights

- 88% of physicians said they would like their patients to be able to track and/or monitor their health at home, particularly their weight, blood sugar levels, and vital signs.
- 63% of physicians surveyed said they are using personal devices for mobile health solutions that aren’t connected to their practice or hospital IT systems, and 30% said their hospital or practice leaders will not support the use of mobile health devices.
- 57% of physicians said they would like to use remote devices to monitor the patients outside of the hospital. Physicians, however, want to see filtered information or exceptions in their patient’s health, not all the data all the time. Too much information could actually slow down care.
- 56% of physicians who are using mobile devices in their practice said the devices expedite decision making and almost 40% said the use of mobile devices decreases time spent on administration.
- 40% of physicians said they could reduce the number of office visits by 11% to 30% by using mobile health technologies, such as remote monitoring, e-mail, or text messaging with patients. Such shifts could address the shortage of physicians, reduce hospital readmission costs, and increase access for patients who delay care because they don’t want to wait for an appointment.

engage their audiences and are willing to listen to what they say and how they want to receive information will likely stand a better chance at gaining access to the people they need to influence.

Barry Schmader, executive VP and CEO of Dudnyk, says he believes that there is potential for the social media model to fill the gap left by a departing sales force, if channeled in the proper way.

“Secure, personalized, professionals-only sites have the potential to fill the gap, but they would have to contain non-promotional content and be moderated closely, which slows down the immediacy of the media — one of its key aspects,” he says.

Mr. Marchese agrees.

“Declining rep access is not a new subject,

**Joe Kuchta**

GA Communication Group

"The industry needs to embrace technology, but it also needs to keep its eye on the prize: creating the right message for the target."

access has been decreasing for some time now, and marketers have been trying to identify how they can gain access

through solid messaging and overcome a lack of access through innovative channels," he says. "While solid messaging has always been a goal, the innovative channel approach is the major factor for the next one to five years."

The integration of professional and consumer promotional strategies and tactics will become critical for all companies.

"Brand managers can no longer put promotional programs together by communicating with disparate audiences and providing with divergent — or worse, conflicting — messaging, which not only creates muddy brand messages, but wastes investment dollars," says Jay Bigelow, CEO of MicroMass Communications. "To be successful, they will have to create cohesive, integrated programs that focus and reinforce their messages across all customer groups."

A move toward unbranded marketing is on the horizon, Mr. Schmader predicts.

Thanks in part to stricter regulations, branded mass-media promotions — journal and banner ads — will evolve into streamlined creative graphic reminders of product benefits with fewer claims, he says.

"Smart brand managers will spend a significant portion of their promotional budgets on unbranded promotions, from social and digital media to print, as this will be the new forum for exchanging information about disease state issues, changing treatment modalities, and introducing innovative therapies, and enhanced delivery of existing molecules," Mr. Schmader says.

In compliance with new guidelines, unbranded messaging and visuals must be separate from the branded messages with no connectivity in look or by digital link.

"Now is the time to make unbranded communications have more value and impact than just a side dish to the brand's entrée," Mr. Schmader adds.

Being nimble in a nichebuster world will also be a prime factor to success, adds Mr. Clark from IMS. Competition will intensify in practically all therapy areas and this will make the job of marketers much tougher in years to come. Brand teams will have to seek differenti-

ation by focusing on tighter populations and disease profiles rather than broad approval.

"In addition, marketing teams will have to build their lifecycle strategy and adapt their messages based on real-world outcomes," Mr. Clark says. "Launching products in

this environment will require tighter organizational alignment, particularly between clinical and commercial, and between local and global."

Ahnal Purohit, Ph.D., CEO and president of Purohit Navigation, says as more specialty companies merge and grow, there will be an increased need for agencies that can work within this unique environment.

"Increasingly, we are observing many big pharma companies expanding beyond their billion-dollar brands and purchasing or absorbing biotech and/or smaller specialty brand companies," Dr. Purohit says. "The needs of the specialty brand target audiences are quite different and require specialty thinking — something many of big pharma's network agencies are often not well-suited to handle."

INCREASED PRESSURE ON ROI

The future of healthcare marketing will be in the art of establishing an unshakeable ROI model that defines success, Mr. Bolling says. Successful marketing models will shift away from traditional advertising models to more targeted, more efficient models.

"Targeting and segmentation will play an increasing role in the success of any program, seeking to put the right messages, in front of the right targets, at the right frequency, using the channel preferences they prefer," he says.

The use of analytics, including detailed ROI calculations, as well as marketing mix optimization analyses will become more and more prevalent over the coming years.

"As budgets become tighter and more carefully scrutinized, marketers will need to ensure that their initiatives are meeting objectives, delivering an appropriate ROI, and earning a place in the overall marketing mix for the brand," Mr. Previdi says.

As companies look for ways to become more efficient by cutting costs, marketers will need to prove that their programs and tactics are driving business.

"Understanding which customers — either physicians or consumers — respond most positively and which need improved messaging will grow in importance so that brand teams can refine programs and increase sales," Mr. Ross adds. ♦

PharmaVOICE welcomes comments about this article. E-mail us at feedback@pharmavoices.com.

MARKETING MIX: A BUDGETARY SHIFT

In February, an Econsultancy survey conducted in association with ExactTarget reported that overall marketing budgets were shifting away from traditional channels and toward more digital channels in 2010. In the survey, 46% of companies planned to increase their marketing budgets, and 66% planned to increase their investments in digital marketing channels. We asked our thought leaders to predict media budget breakdowns.

- More print journals will move to exclusively online content due to the cost of production and declining readership and advertising revenue. — Jon Hudson, VP, Digital and Media Services, MedThink Communications
- Enhanced digital media spend, increased spend on other communications channels, including public relations, and a reduction in the use of banner ads due to unwieldy fair balance. — Syed Moinuddin, MedThink Communications
- Media should be selected and tested based on predefined criteria. As program results are evaluated, energy and budgets should be directed at those channels yielding the desired results and away from those where results are suboptimal or not meeting desired expectations. — Jay Bolling, President, Roska Healthcare
- Digital spending has comprised up to about 20% of a pharma brand's media mix over the past few years. That number will likely get closer to 40% or higher over the next two years. The biggest shift is that marketers are going to be spending less on paid media and more for idea implementation in the digital context — e-detailing, Web-based learning, patient-focused disease-state sites, or compliance improvement applications. — Todd LaRoche, Executive VP, Managing Director of Creative, Palio
- Digital will continue to grow as a percentage of media spend as it is no longer a nice-to-have tactic, but rather a vital part of any integrated effort. Customers now mix traditional vehicles with new technologies and communications tools, which have become a part of their everyday world. — Jay Bigelow, CEO, MicroMass Communications
- Less money will be spent per brand on TV and more focus will be on digital and CRM as the ability to deliver one-to-one personalized communications continues to improve. — R. Shane Kennedy, Executive VP & Managing Director, Sudler Digital

Top Trends Impacting Marketing

INDUSTRY EXPERTS PROVIDE THEIR INSIGHTS ON THE TOP TRENDS THAT WILL SHAPE MARKETING IN THE COMING YEARS.



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1. There will be an increased focus on globalization — and less on the United States.
2. The digital landscape will redefine how marketing is delivered to our targets.
3. There will continue to be pressure to cut costs but deliver the same quality work.



JAY CARTER is Senior VP, Director of Strategy Services, AbelsonTaylor, an independently owned full-service healthcare advertising agency. For more information, visit abelsontaylor.com.

1. Comparative effectiveness studies, and resultant changes in federal payment, will impact several large drug categories, creating winners and losers where today there are merely competitors.
2. More blockbusters will enter the ranks of generics, making the launch of brands even more about clear positioning for a specific patient with a real medical need for the new product.
3. Somebody will figure out the perfect brand that requires social media to aid in the public health and a pharmaceutical company's bottom line. That organization and DDMAC will confer to find a case study for how to do social with a DDMAC imprimatur.



PHIL DESCHAMPS is President and CEO, GSW Worldwide, a full-service agency that provides an array of services from strategic insight and guidance, branding and hallmark creation, prelaunch, and disease state awareness to medical education, digital and closed-loop marketing, patient outcomes, public relations, brand entertainment, and DTC campaigns. For more information, visit gsw-w.com.

1. Demographic shift. The results of this year's census are expected to show that married with children at home is no longer "normal." Young women are out

earning young men in America's metros by as much as 20%. Women are the majority in the workforce. The average 25 to 34 year old has never been married.

2. Critical mass of digital doctors. Digitally savvy doctors are geeking out the exam room with gadgets; they're engaging patients in two-way, ongoing conversations; they're connecting real time all the time. Time for us to rethink what we know about HCPs — this generation of docs won't be satisfied with medicine or marketing as usual.
3. End of winner take all. There will be no "right way" to reach doctors or patients. Just the "right way for me." Medicine will become more personal and so will marketing.



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plan, health provider, and life-sciences industries. For more information, visit deloitte.com.

1. The direction DDMAC takes in adapting to the needs of pharmaceutical companies will affect the quality and value of messaging.
2. The methods of initial and ongoing evidence collection will impact communications.
3. Wrap-around services, for example adherence or disease management programs, that put products in an effective context to deliver promised value will continue to evolve.

DAVID FISHMAN is President, Snowfish LLC, which integrates clinical, marketing, and quantitative information to answer a client's specific objective. For more information, visit snowfish.net.

1. The addition of more than 30 million new patients to the insurance rolls will impact how the industry reaches out to patients.
2. Technology continues to define or redefine ways to reach customers. For example, only 10 years ago, CD-ROMs were the cutting edge and ubiquitous to all medical education offerings. Today, they are used as bathroom key rings.
3. We are at the point of data saturation with respect to customer information. The ability to cut through all of these data through effective integration and analysis will move marketing to the next level.



GLORIA GIBBONS is President, EMEA, AP, Latina, Ogilvy CommonHealth Worldwide provides comprehensive healthcare marketing services across the globe. For more information, visit ogilvy.com.

1. Globalization will drive consistency of campaign and message, speed of delivery, and cost-efficiency.
2. According to the IBM global CEO survey, 20% of sales growth will come from innovation in the future, communicating differently, freshly, and more engagingly for already approved products, to reinvent customer relationships for the better.
3. Digital technology will change the way companies interact with their stakeholders and how they interact with others; it will change how doctors or patients learn about healthcare.

SUSHIEL KESWANI is Executive Director, Advisory Services, Life Sciences Customer Domain, for Ernst & Young Advisory Services, a professional services organization that helps companies across the globe to identify and capitalize on business opportunities. For more information, visit ey.com.

1. Purchasing decisions and influence will move further away from the physicians and toward payers and patients. This will require new geo-specific market segmentation and key account management approaches.
2. There will be increased scrutiny on marketing and sales practices — off-label marketing and payments to HCPs — in mature markets and adherence to FCPA and anti-bribery guidelines in emerging markets.
3. Market access challenges in both mature and emerging markets will drive creative collaborations with multiple nontraditional industry stakeholders.



TODD LAROCHE is Executive VP, Managing Director of Creative, Palio, which is a full-spectrum advertising and communications agency. For more information, visit palio.com.

1. There will be a shift from push to pull strategies that digital has propagated.
2. The regulatory issues surrounding pharma marketing in the "pull" environment will continue.
3. There will be a dwindling of breakthrough blockbuster-potential products.



DOUG MACK is President of Event Support Services Rx (ESSRx), the parent company of Advantage Broadcast Solutions, AV Solutions, and Total Health Rewards. For more information, visit essrx.com.

1. Finding creative and engaging messaging that is controlled and compliant.
2. Increasing focus on ROI from smaller sales forces.
3. Finding the balance between digital/online marketing and peer-based live programming and how they can best be coordinated.



SYED MOINUDDIN, Account Director, MedThink Communications, a healthcare agency that provides full-service offerings with a focus on scientific and promotional communications. For more information, visit medthink.com, or e-mail smoinuddin@medthink.com.

1. There will be increased FDA scrutiny of marketing materials and reduced flexibility of materials.

2. There will be reduced emphasis on personal selling.
3. There will be increased generic competition.



DAVID ORMESHER is CEO, closerlook inc., a strategic marketing agency specializing in healthcare. Their structured approach to strategy, technology, and innovation helps brands build integrated marketing programs

that deepen customer relationships. For more information, visit closerlook.com.

1. Adoption by professionals of online and mobile sources of medical content will continue to undermine the traditional role of the sales rep while offering more efficient channels through which to communicate.
2. Specialty drugs are used by smaller specialty practices, requiring more sophisticated targeting within a cost-effective marketing strategy to achieve share of voice and trust among professionals and patients.
3. The post-reform focus will move from universal coverage to arresting the growth of costs, and the relationship between insurance and pharma will become more conflicted as the pressure intensifies to cut costs.



KEN RIBOTSKY is President and CEO, The Core Nation, which includes healthcare marketing firms Brandkarma and Core-Crete, and medical communications company Alpha & Omega.

The Core Nation connects its family of healthcare marketing and communications companies with its own high-level strategic, branding and creative consulting services. For more information, visit thecorenation.com.

1. Representatives' limited access to physicians and staff is going to force marketers to find ways to reach out to their targets that have not been used in the past. The physician audience may become more like a consumer audience in that the direct lines to the audience are disappearing.
2. Self-regulation will make it more and more difficult to differentiate one's brand.
3. Comparative effectiveness will create new topics of conversation and allow us to begin to consider the patient and the disease as a whole, including its effect on the individual and society.

EXPERTS

JAY BIGELOW, CEO, MicroMass Communications offers capabilities in the application of behavioral science to marketing challenges. For more information, visit micromass.com.

JOHN BLAKELEY, Executive VP, Sales and Marketing, ERT, a global provider of technology and services to the pharmaceutical, biotechnology and medical device industries. For more information, visit ert.com.

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NICK COLUCCI, President and CEO, Publicis Healthcare Communications Group is a healthcare communications agency network with 40 offices around the globe. For more information, visit publicishealthcare.com.

LEO FRANCIS, PH.D., President, Publicis Medical Education Group, part of Publicis Healthcare Communications Group, is an authoritative, trusted, and provocative partner in creating in creating value in healthcare communications. For more information, visit publicishealthcare.com.

JON HUDSON, VP, Digital and Media Services, MedThink Communications is a healthcare agency that provides full-service offerings with a focus on scientific and promotional communications. For more information, visit medthink.com.

HARRIS KAPLAN, CEO, Healogix, which provides marketing research and consulting for the pharma and biotech industries. For more information, visit healogix.com.

JOE KUCHTA, President and CEO, GA Communication Group helps clients take full advantage of every communication channel to make every interaction with their customers as engaging and impactful as possible. For more information, visit gacommunication.com.

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ROBERT PREVIDI, President and CEO, PSKW and Associates specializes in developing loyalty marketing programs ranging from new product launch programs to patient adherence and compliance. For more information, visit pskw.com.

AHNAL PUROHIT, PH.D., CEO and President, Purohit Navigation, a full-service, independent, integrated healthcare brand solutions company positioned. For more information, visit purohitnavigation.com.

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