

# *Chair's Opening Address*

## 9th Annual ePharma Summit



Paul Ivans, Evolution Road  
Philadelphia, February 9, 2010



# *Amazing Agenda*

**Healthcare Reform**

**Social Media and Web 2.0**

**Driving Sales & ROI with eMarketing**

**Innovation**

**Integration**

**Evolving Regulatory Landscape for Digital**

**The Right Channel Mix**

**Helping People Live Healthier Lives**



# Current State?



# *Leverage Digital...*

**To fundamentally  
change how  
marketing is  
done**



# Ugh

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## Justice Department Announces Largest Health Care Fraud Settlement in its History

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## GAO Seeks Price Spike Explanation

Jan 13, 2010  
By: George Koroneos, Online Content & News Editor

The Government Accountability Office (GAO) released a report detailing the correlation between increases in drug prices and decreased competition. Released during the holidays, the report attempts to explain how 116 brands

## Why Big Pharma's 2010 Looks Challenging

By Lisa LaMotta Dec 17, 2009 1:40 pm

The stagnant economy may finally catch up to it.

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### Related Articles

[Gilead Sciences and Its Acquired Problems](#)

[Pharma's Next Big Thing: Personalized](#)

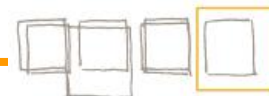
While the recession has been top of mind for most [industries](#), it has yet to have a major affect on the health care arena. Internal issues like patent expirations and the shift to biologics have

Search Suppliers

## Top 10 Layoffs of 2009

December 9, 2009 — 9:03am ET | By Maureen Martino

Welcome to our third annual list of the pharmaceutical industry's top layoffs. With three mega-mergers in 2009, this was a particularly brutal year for job cuts. Not surprisingly, Pfizer (which purchased Wyeth for



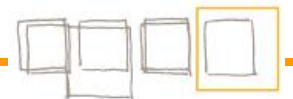
**Paul's view...**

**5 Things to Ponder  
to help us get there**

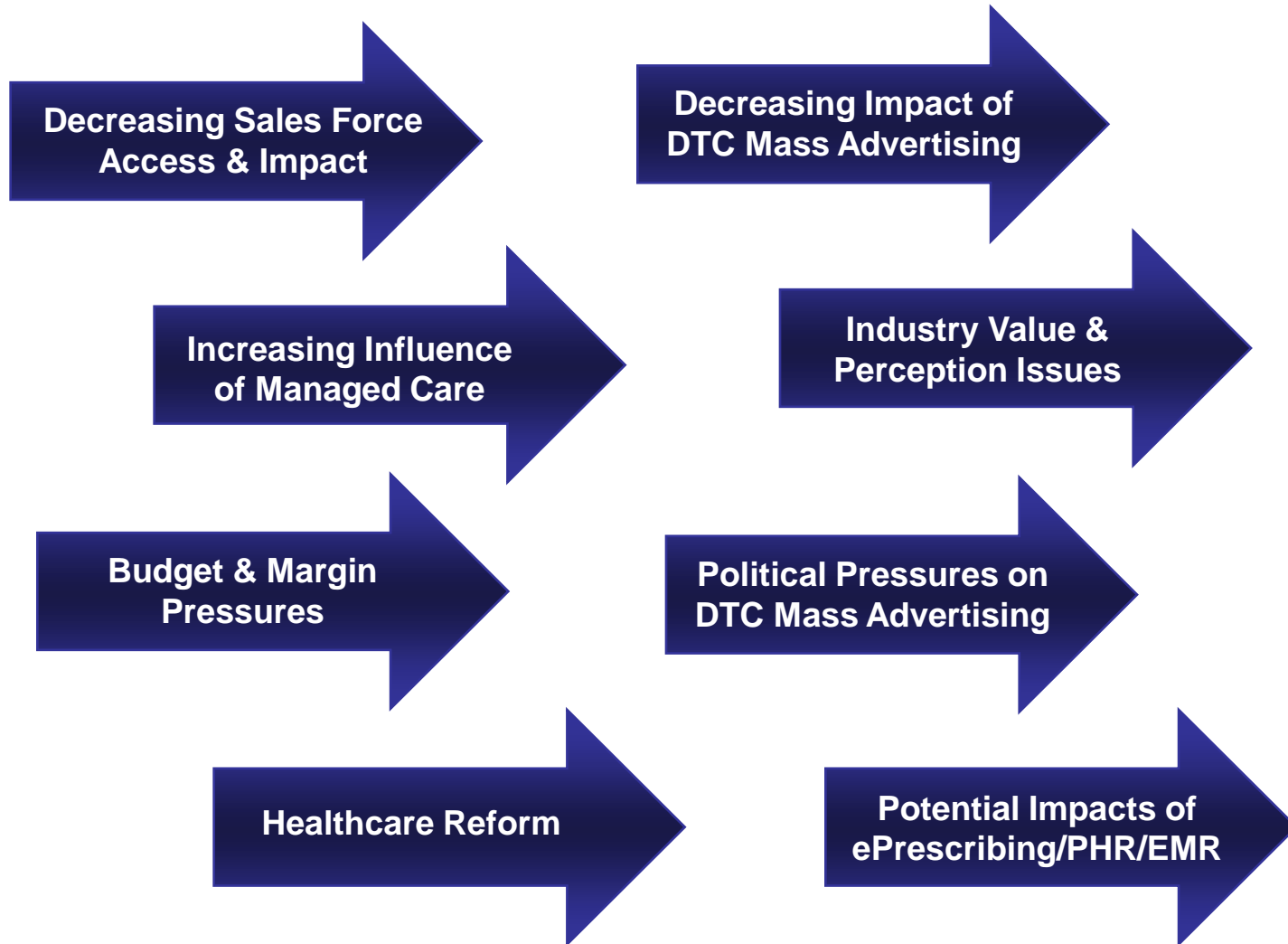


**#1**

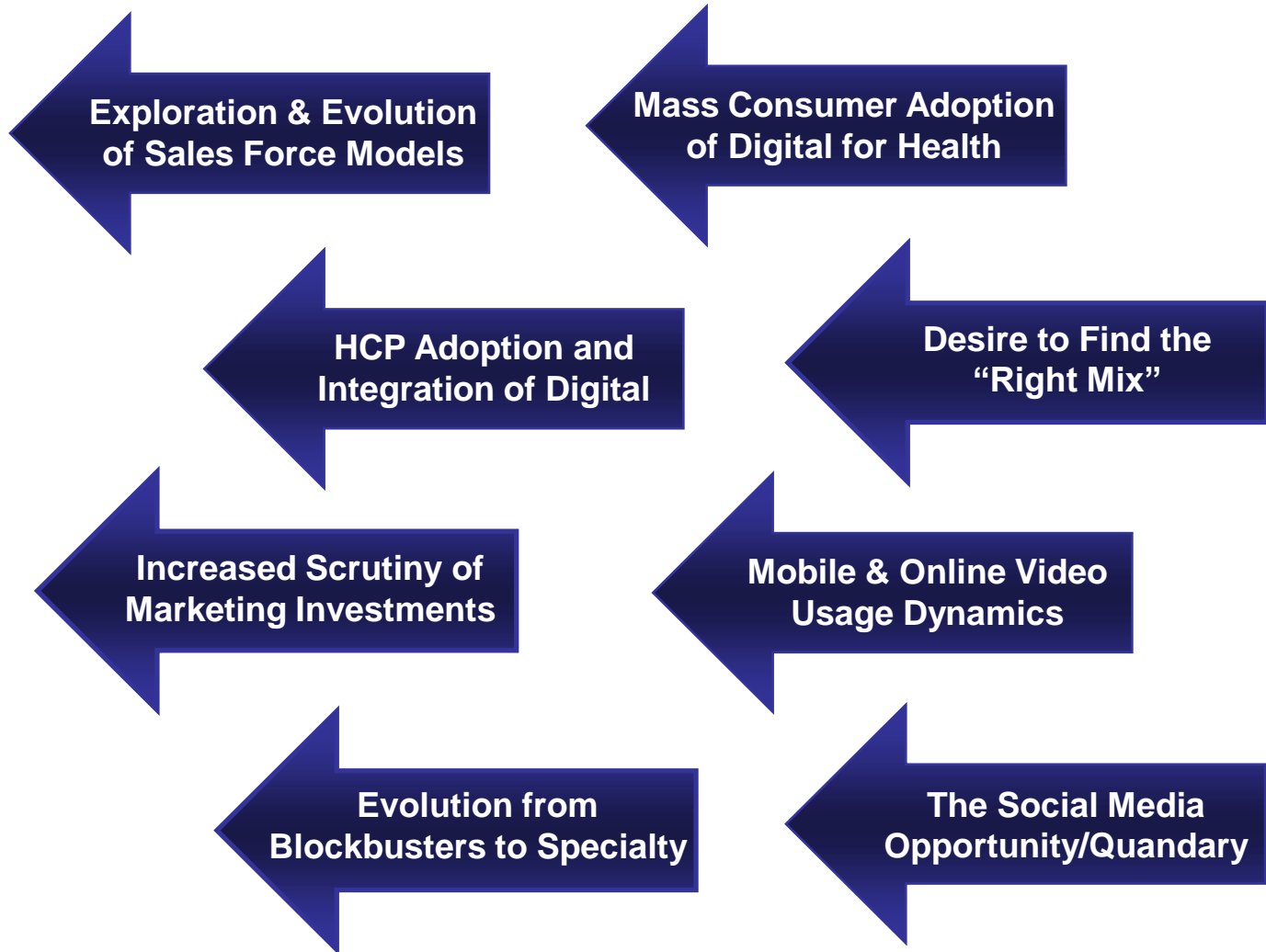
**We HAVE to Step Up to  
Help Save Our Industry**



# Industry Challenges



# Digital Opportunities



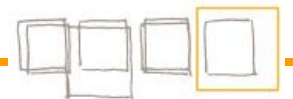
# *Digital Will*

**Fundamentally  
change how  
marketing is  
done**



#2

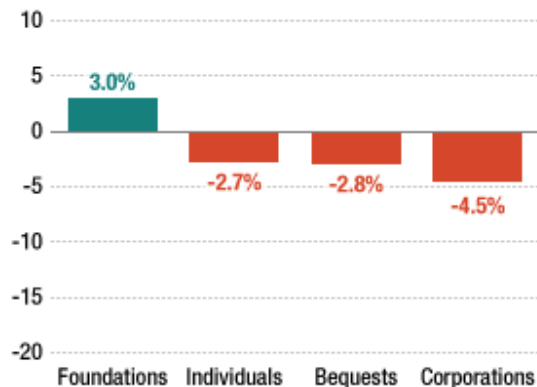
**Nowadays, even charities  
are hurting**



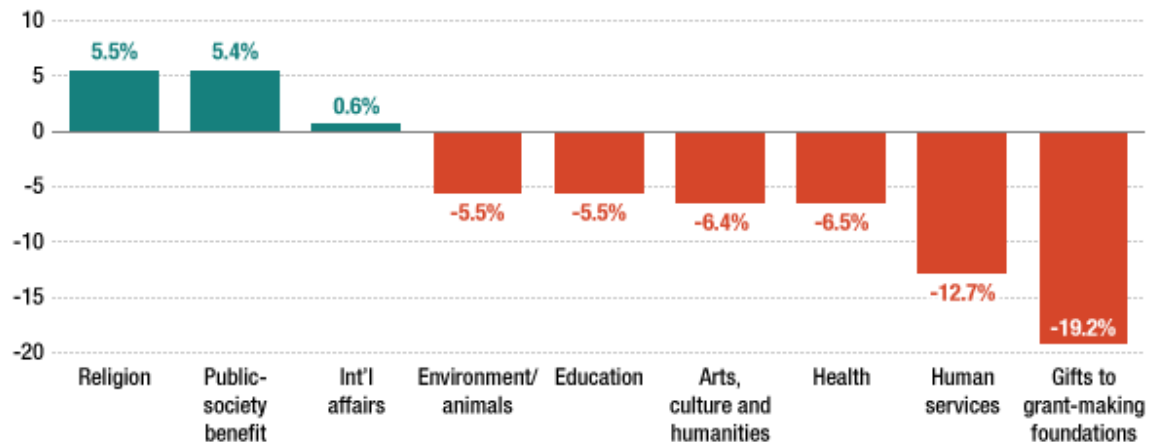
# Charitable giving declined in '08

- First time since 1987 (20+ years)
- And only second time since 1956 (50+ years)

Giving Less: Contributions By Donor

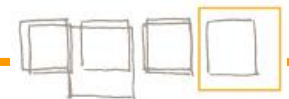


Getting Less: Groups Receiving Contributions



Source: Giving USA Foundation

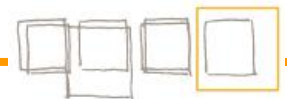
So digital budgets won't increase  
just because "it's the right thing to do" either



# That said, the world has rallied

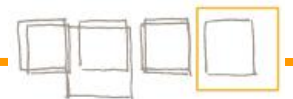
The screenshot shows the American Red Cross website. At the top left is the Red Cross logo and the text "American Red Cross". To the right are navigation links: "About Us", "Contact Us", "Governance", "Media Resources", "Connect", "Español", and a "Search" box. Below this is a "Join Us" section with input fields for "Email" and "Zip Code", and a "GO" button. Further right are buttons for "Give Blood" and "Volunteer". A horizontal menu below contains four categories: "Preparing and Getting Trained", "Getting Assistance", "Giving and Getting Involved", and "Working with the Red Cross". The main content area features a photograph of a Red Cross worker and a woman carrying a large bundle of supplies on her head. To the right of the photo is the headline "Donate to Help People Affected by the Earthquake in Haiti" and a pagination control showing "5 4 3 2 1".

The screenshot shows a CNN Living article. The top navigation bar includes "CNN Living" and a menu with "U.S.", "World", "Politics", "Justice", "Entertainment", "Tech", and "Health". The article title is "HAITI EARTHQUAKE" and the sub-headline is "How far Haiti relief donation go". The author is listed as "Christopher Dawson, CNN".

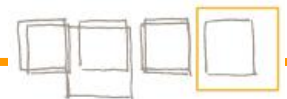


# #3

**So, we really need to  
prove digital works**



# *Prove it to the “Sweaty VP”*

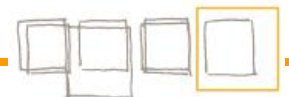


# *Digital Marketing Works!*

## **Comscore 4<sup>th</sup> Annual Pharmaceutical eMarketing Effectiveness Benchmarks...** *(based on the aggregate of over 50 studies)*

### **eMarketing Driving Lifts in:**

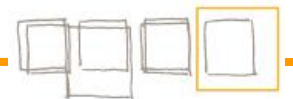
- ***Communication (awareness, favorability, etc.)***
- ***Incremental Prescriptions (new starts, refills)***



# *And Specifically*

## Brand.com Websites Drive...

- Incremental New Patient Starts
  - +11% of qualified prospects who visit Brand.coms become new patients above control
- Incremental Current User Refills
  - +20% of current brand users who visit Brand.coms fill an incremental Rx above control



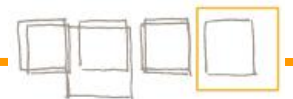
# *Core Focus for ROI*

- **Build GREAT Brand.coms (4<sup>th</sup> year running)**
  - Spend the time
  - Spend the money
  - Do the research
- **Make Google richer**
  - and Yahoo!, Bing & the rest
- **Leverage Banners for mass reach and scale**

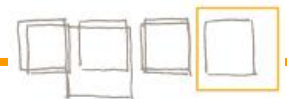


**#4**

**I LOVE ice cream,  
but I don't eat it every meal**



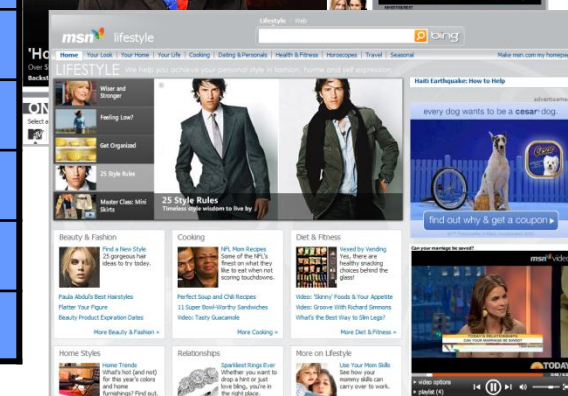
*Same should be true  
for online video*



# Online Video is MASSIVE, PERVASIVE and FUN!!!

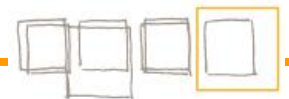
## US Internet users watched over 33 billion videos in December 2009

Top Properties	#Videos	%Share
Google Sites	13 billion	39%
Hulu	1 billion	3%
Microsoft Sites	561 million	1.7%
Fox Interactive	551 million	1.7%
Yahoo! Sites	539 million	1.6%
Viacom Digital	373 million	1.1%
Turner Network	367 million	1.1%
CBS Interactive	298 million	1%
AOL	210 million	1%



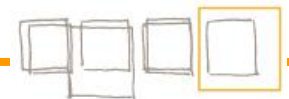
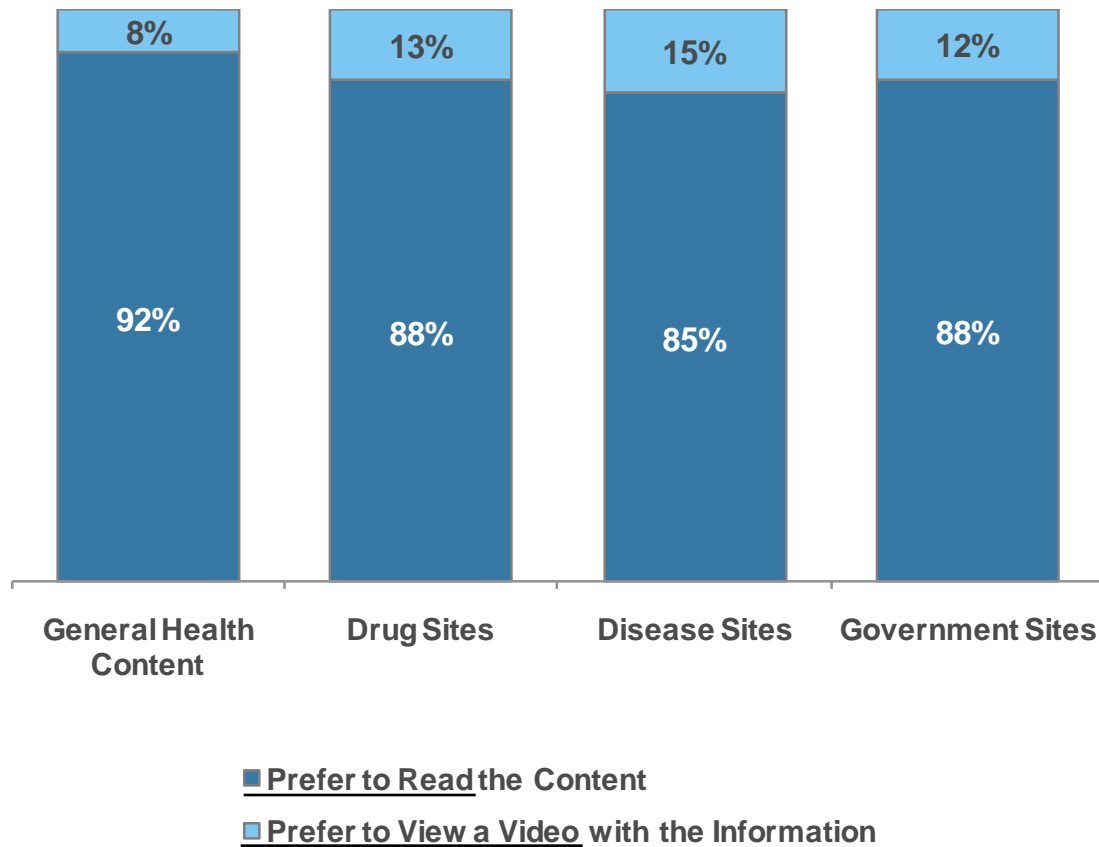
# *The Numbers are Incredible*

- **178 million U.S. Internet users watched online video during December 2009 (87% of online audience)**
  - Average 187 videos each
  - Average online video was 4 minutes
  - Average viewer watched 12 hours of video
- **Video accounts for 34% of time Americans are online**
- **YouTube** - 134 million viewers watched an average of 97 videos each
- **MySpace** - 45 million viewers watched an average of 9 videos each
- **Hulu** - Average Viewer watched 23 videos, totaling 2 hours



# Consumers still prefer to READ health information

## Preference on Receiving Information



**#5**

**Social has changed the world**

**But Mobile will change marketing**



# Obviously

## Facebook

- 350 million people on Facebook.
- 50% of active users log in every day
- 35 million users update their status each day
- 55 million status updates posted each day
- 2.5 billion photos uploaded each month



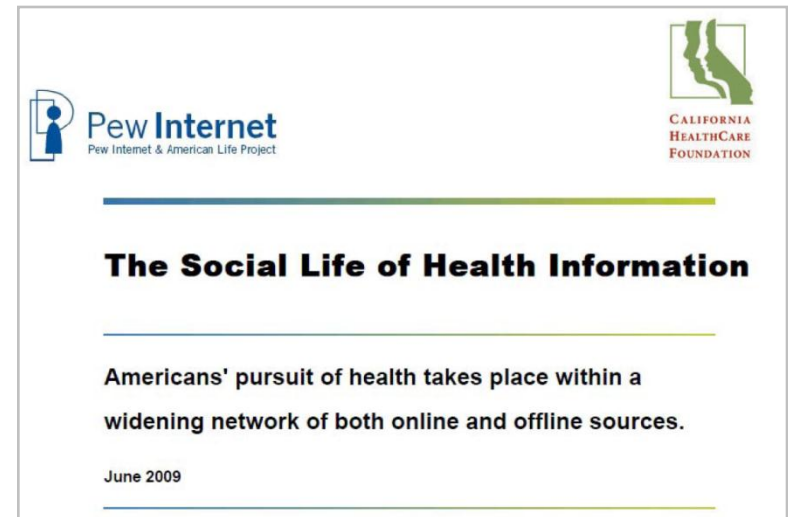
## Twitter

- 27 million tweets per day
- 4.25 million people follow Ashton Kutcher (@aplusk)



# And Health Info

- **Two-thirds of online health consumers access user-generated health content**
  - 41% read a health blog/posting
  - 24% used online doctor rankings
  - 24% used online hospital rankings



*But marketers are not really welcome  
at the dinner table*



*Yet...*

Mobile will transform marketing  
from “Form to Function”



# Mobile Internet will be the Next Major Computing Cycle

**Mainframe Computing**  
1950s



**Mini Computing**  
1960s



**Personal Computing**  
1980s



**Desktop Internet Computing**  
1990s



**Mobile Internet Computing**  
2000s

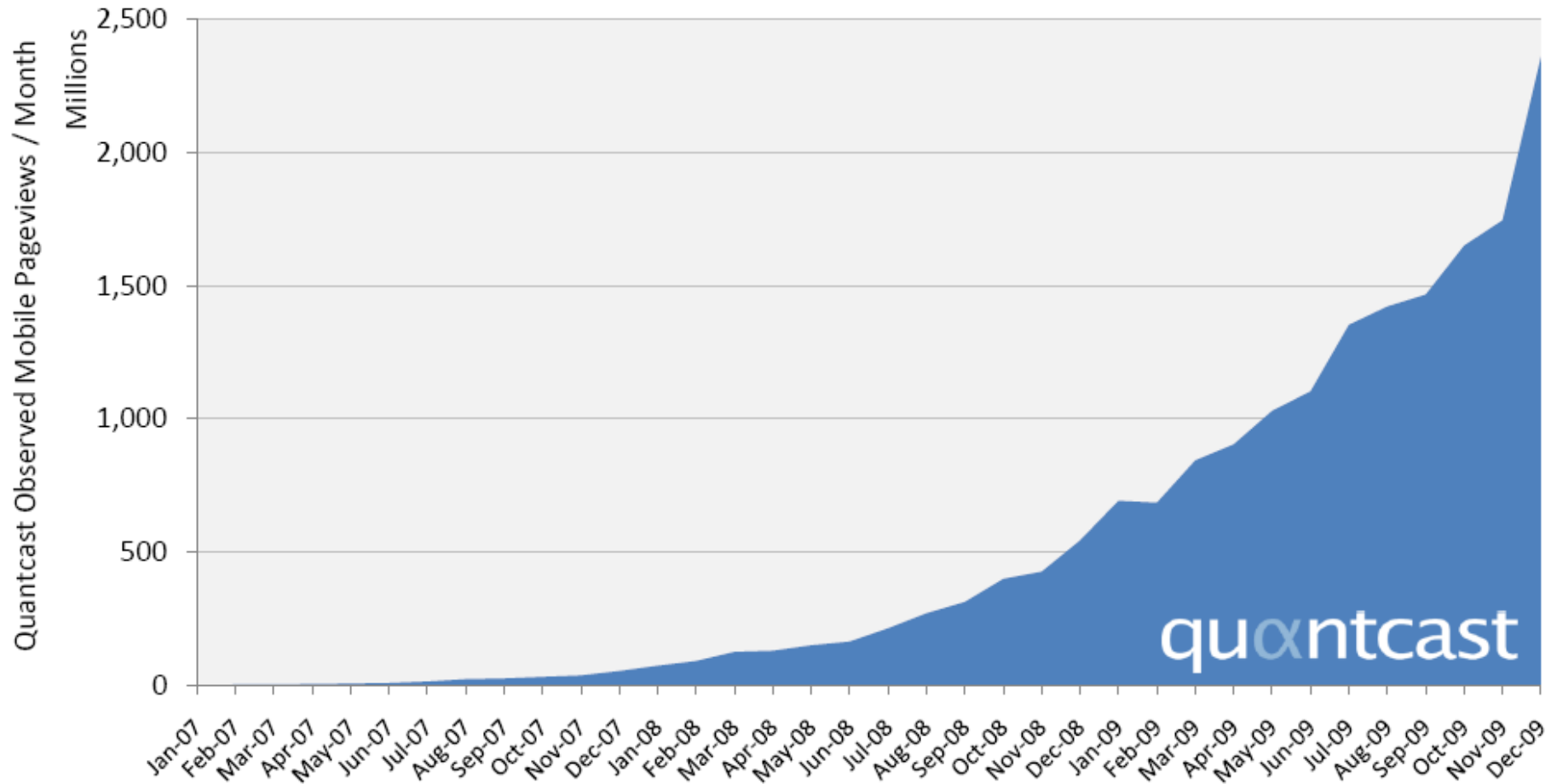


Morgan Stanley


31



# Growing Rapidly



# Mobile Advertising Getting Serious



HOME FINANCE **TECHNOLOGY** INNOVATION

## The Tech Beat

### Google Buys AdMob in Bid to Boost Mobile Ads

Posted by: Rob Hof on November 09

In its third-largest acquisition to date, Google [announced](#) it's buying AdMob, a provider of mobile ad technologies, for \$750 million in stock. The purchase, announced this morning, will give the relatively small market for ads on mobile devices a big boost.

The move also gives Google, whose Android software is being used more widely in smartphones such as the Motorola's new Droid, a key set of technologies to expand its advertising footprint beyond its signature text search ads. "Google could have built this but this gives them a head start," says mobile analyst Greg Sterling of Sterling Market Intelligence. "It will thrust Google into the forefront of mobile display ads."



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## MarketWatch

January 28, 2010 11:02 AM EST

New York **Open** London **Open** Tokyo **Closed**

### Latest News

10:59a 3M beats profit view, raises outlook  
10:58a AT&T profit leaps 25% on mobile gains  
10:56a Nasdaq Composite declines 34.27 points to 2,187.14

DOW	-96.28	NASDAQ	-33.65	S&P 500	-8.68
10,140	-0.94%	2,188	-1.52%	1,089	-0.79%

**BULLETIN Dow industrials drop 100 points**

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Jan. 5, 2010, 4:19 p.m. EST · Recommend · Post: [f](#) [t](#)

## Apple acquires mobile advertiser Quattro Wireless

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By **Rex Crum, MarketWatch** [Alert](#) [Email](#) [Print](#) [Share](#)

**SAN FRANCISCO (MarketWatch) -- Apple Inc. is looking to improve its standing in the market for mobile advertising following its acquisition Tuesday of Quattro Wireless, a developer of wireless-ad networks.**

*But that's nothing...*

**Mobile Devices + Apps  
will unlock massive opportunities  
to improve health outcomes**



# “Beyond the Pill”

## Pharma

R&D  
*Products*



Digital Marketers  
*Health Info & Support*



Digital Marketers  
*Health Outcomes*



*In Summary,  
what do we do now?*

**The Bottom Line is  
we need to impact the Topline  
NOW!**



*In Summary,  
what do we do now?*

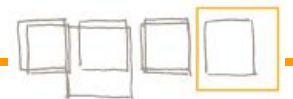
**And engage in Video, Social and  
especially Mobile for the future**



# *When We Do...*

*Further improve health outcomes  
for our patients*

*Prove the value that pharma  
provides to society*



***Thank You!***

***And have fun over the  
next 2 days***



**Paul Ivans**

**[pivans@evolutionroad.com](mailto:pivans@evolutionroad.com)**