
Executive Landscape Study

Completed December 2014

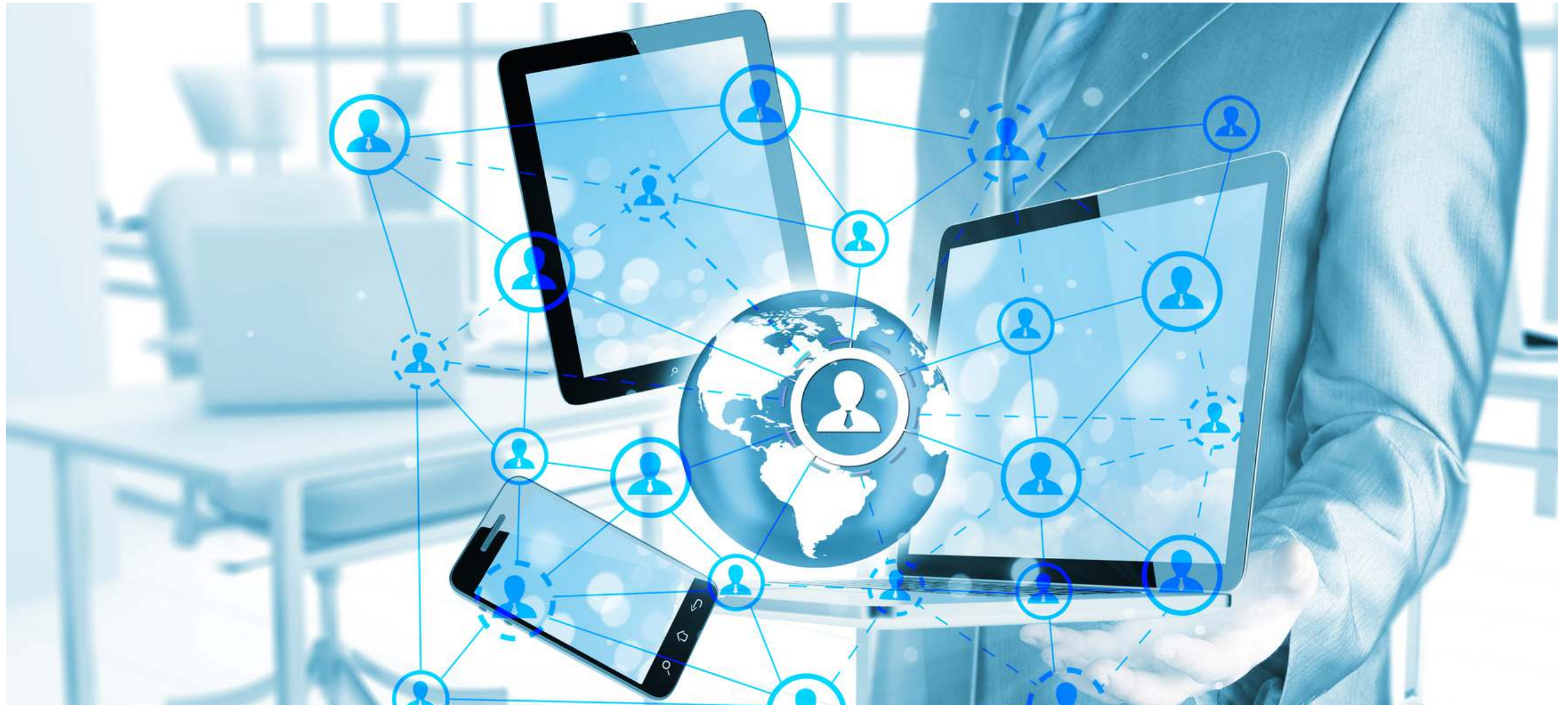




Profile of Respondents (from 20 companies)

80% from pharmaceutical
companies

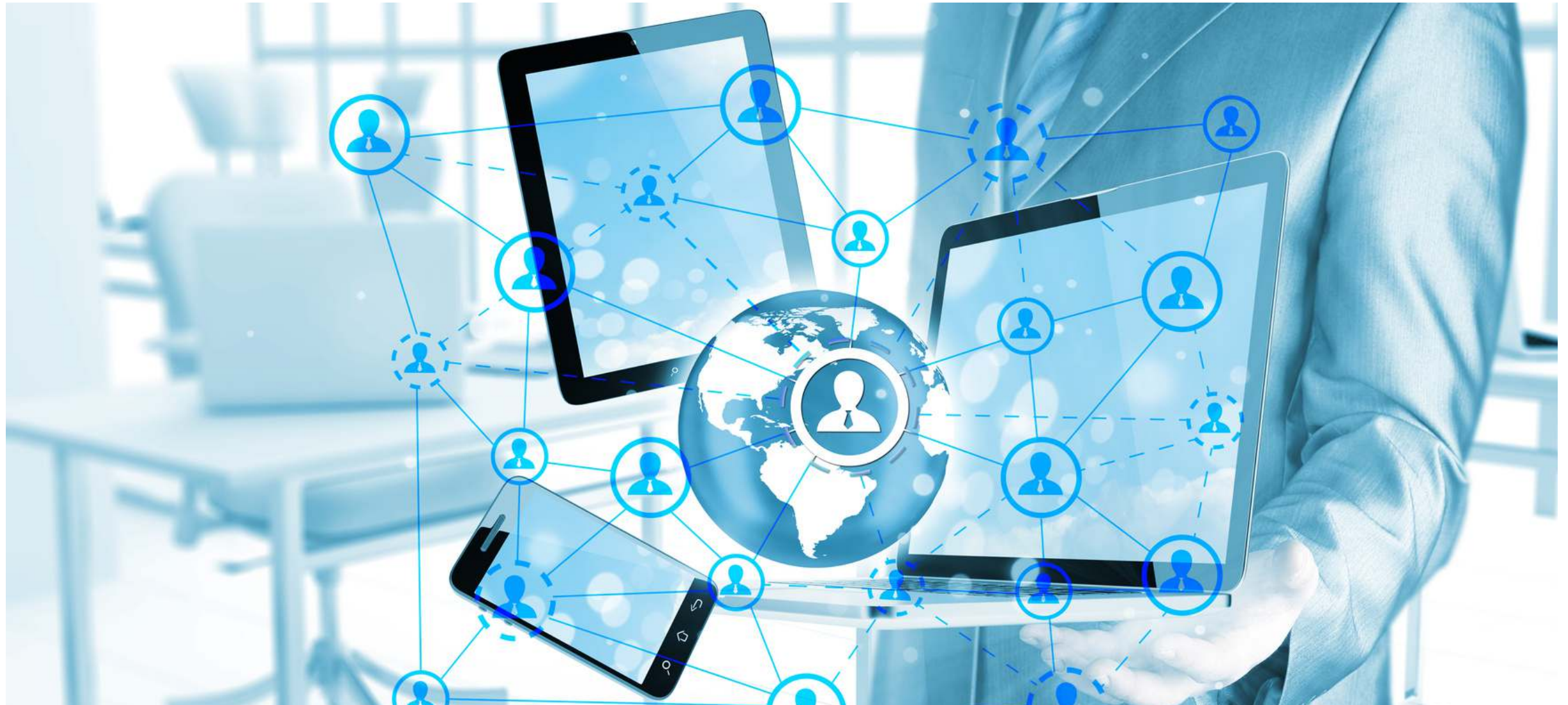
remainder of respondents
from consulting, device, and
agencies (thought leaders)



How Savvy is Pharma? **Social Media**

80% say pharma is still
“very far behind” and 10%
say “slightly behind” others

none say “slightly ahead”



*How Savvy is Pharma? **Mobile***

25% say pharma is still
“very far behind” and 55%
say “slightly behind” others

none say “slightly ahead”



How Savvy is Pharma? Digital Overall

25% say pharma is still
“very far behind” and 40%
say “slightly behind” others

only 10% say “slightly ahead”



Making Progress with Customer Service

Industry is split when it comes to progress towards a new customer service model

50% see improvement, 40% see no improvement, and 15% are not sure



The Impact of “Beyond the Pill”

The Vast Majority Agree
BTP Will Have a Major
Impact the Next Decade

25% agree 10 out of 10...
and 70% agree 7-10 on 10 point scale



The Impact of “Connected Health”

Similarly, Almost All Agree
Health Connectivity will
Change the Pharma Industry

75% agree 7-10 on 10 point scale

Biggest Innovation Opportunity for My Company

“A new customer service model.”

– *pharma exec*

Biggest Innovation Opportunity for My Company

“Point of care support with EHR and patient portals.”

– *pharma exec*

Biggest Innovation Opportunity for My Company

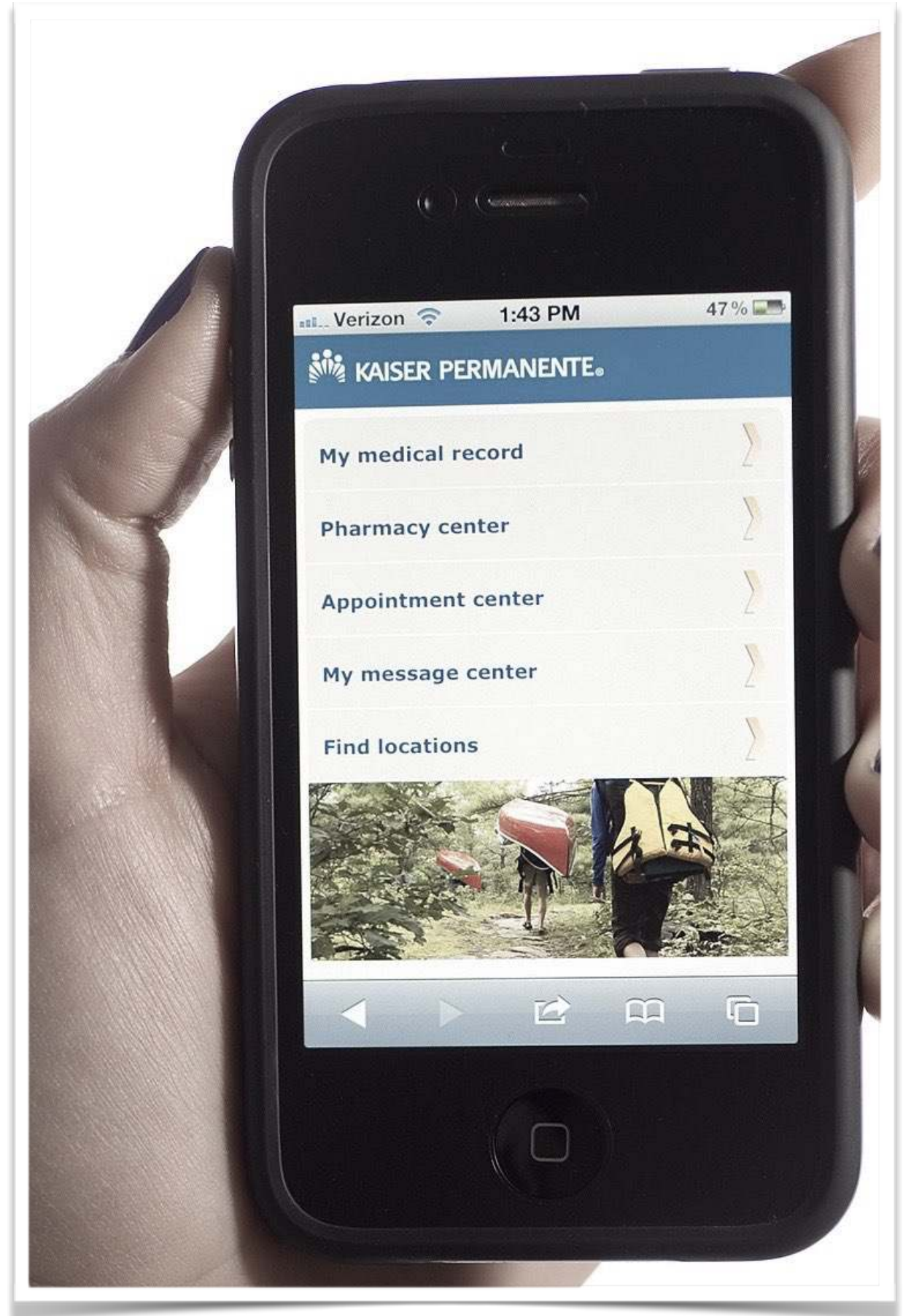
“The amount of data available within the EMR and wearables will transform how we market products.”

– *pharma exec*

Biggest Increases in Budget (2015)

Mobile Content for Smartphones

84% plan to increase their spend



Biggest Increases in Budget (2015)

Consumer Video for Branded Products

72% plan to increase their spend



Biggest Increases in Budget (2015)

Mobile Display Advertising for Consumers

68% plan to increase their spend



Biggest Decreases in Budget (2015)

Product Sites (brand.com)

26% plan to decrease their spend



IMPORTANT SAFETY INFORMATION for ABILIFY:
U.S. FULL PRESCRIBING INFORMATION, including Boxed WARNINGS, and Medication Guide. Antidepressants may increase suicidal thoughts or behaviors in some children, teenagers, and young adults, especially within the first few months of treatment or when the dose is changed. Depression and other serious mental illnesses are themselves associated with an increase in the risk of suicide. Patients on antidepressants and their families or caregivers should watch for new or worsening depression symptoms, unusual changes in behavior, or thoughts of suicide. Such symptoms should be reported to the patient's healthcare provider right away, especially if they are severe or occur suddenly. ABILIFY® (aripiprazole) is not approved for use in pediatric patients with depression.
[See More Safety Information](#)

[ABILIFY for Depression](#) / [ABILIFY for Other Indications](#) / [For People Taking ABILIFY](#) / [Savings Card FAQs](#) / [For Family & Friends](#) / [Important Safety Information](#)

Pay as little as \$5 a month for brand-name ABILIFY



☐ **Check this box to download the savings card.**
By doing so, you agree that you have commercial prescription insurance and are between the ages of 18 and 64.
[Conditions apply.](#)

DOWNLOAD THE CARD >

For Brand-Name ABILIFY Only

Keep in mind that the savings card can only be used for brand-name ABILIFY. If you'd prefer to keep taking the brand, talk with your doctor. He or she can request it on your prescription. Once you have a prescription, take it to your pharmacist along with your savings card. Your pharmacist will let you know if you're eligible and keep your card information on file for future use.

What is ABILIFY for?

ABILIFY (aripiprazole) is prescribed for:

- Use as an add-on treatment for adults with depression when an antidepressant alone is not enough
- Treatment of manic or mixed episodes associated with bipolar I disorder in adults and in pediatric patients 10 to 17 years of age
- Treatment of schizophrenia in adults and in adolescents 13 to 17 years of age
- Treatment of irritability associated with autistic disorder in pediatric patients 6 to 17 years of age

Biggest Decreases in Budget (2015)

Display Ads for Physicians

26% plan to decrease their spend



Biggest Decreases in Budget (2015)

Disease (Unbranded) Sites for Consumers

21% plan to decrease their spend

HEART RATE MATTERS
This website is for United States healthcare professionals only.

AMGEN
Cardiovascular

Heart Failure Today Understanding the Challenges Why Heart Rate Matters What You Can Do Resources

IN PATIENTS WITH
HEART FAILURE,

**A HEART RATE OF ≥ 70 BPM
CAN INCREASE HIS RISK¹**

There are over 5 million American adults living with heart failure.²

A heart rate of ≥ 70 bpm (among other factors including diabetes and reduced LVEF) can increase the risk of hospitalization and mortality.²

* Retrospective analysis of pooled data from the CHARM heart study program of 7,599 subjects with symptomatic HF (defined as NYHA functional class II to IV) who were followed for a median of 38 months to determine the relationship between resting HR at baseline, all-cause mortality, and fatal and nonfatal CV outcomes.

BPM = beats per minute; CV = cardiovascular; HF = heart failure; HR = heart rate; LVEF = left ventricular ejection fraction; NYHA = New York Heart Association.

References:
1. Castagno D, Skali H, Takeuchi M, et al. *J Am Coll Cardiol*. 2012;59:1785-1795.
2. Go AS, Mozaffarian D, Roger VL, et al. *Circulation*. 2014;129:e28-e292.

View webcasts about heart rate in heart failure
Register today

Learn more about why heart rate matters
Explore video library

Help patients keep track of their heart health
Download tracker

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Level of Digital Integration within Your Company

35% believe there is
“very low” internal digital
integration today

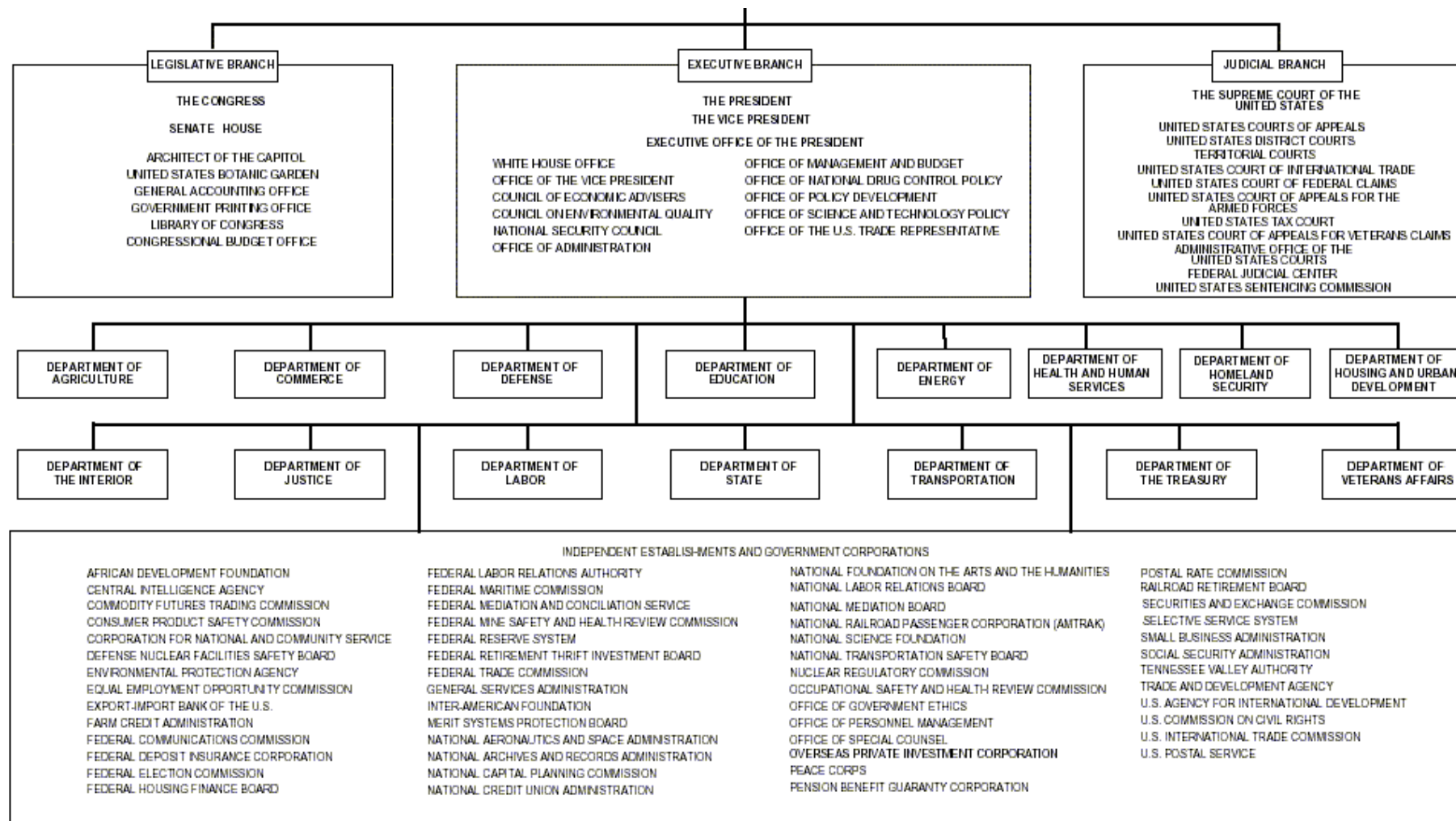
Majority agree there is some
level of integration today and
6% believe their digital
capabilities are “completely
integrated” today



Key Barriers to Greater Use of Digital Technologies

75% believe the lack of knowledge among key decision makers is the issue

Of course 2 in 3 still cite “legal and regulatory” as a barrier



The Evolving Structure of the Digital COE

The predominant digital model remains a centralized group (COE) working with all teams at 41%

35% cite a hybrid model (mix of centralized and embedded digital leads) ... 18% report fully decentralized leads within the brands

How Has Regulatory Evolved with Digital?

“Education, training, and building an internal knowledge base have been key.”

– *pharma exec*

How Has Regulatory Evolved with Digital?

“Our former expedited process for review is now the norm.”

– *pharma exec*

How Has Regulatory Evolved with Digital?

“Have not ... we are still reviewing digital tactics in a system designed 30 years ago for paper.”

– *pharma exec*

Want More Information About the Study?

Send an email request to...

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