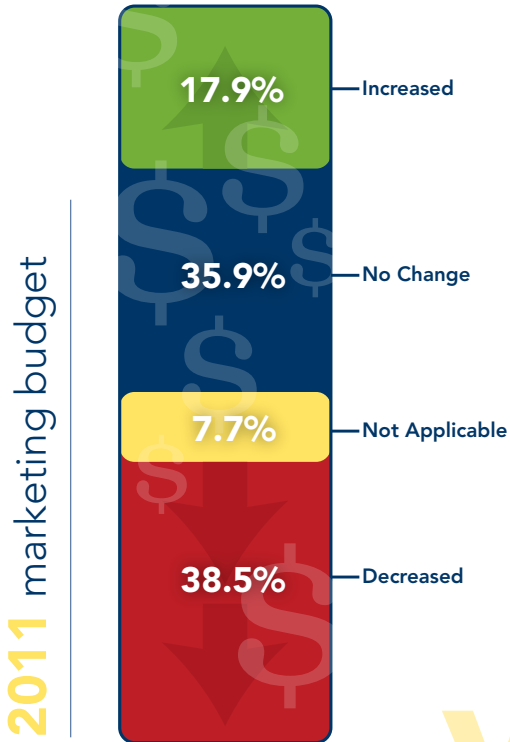




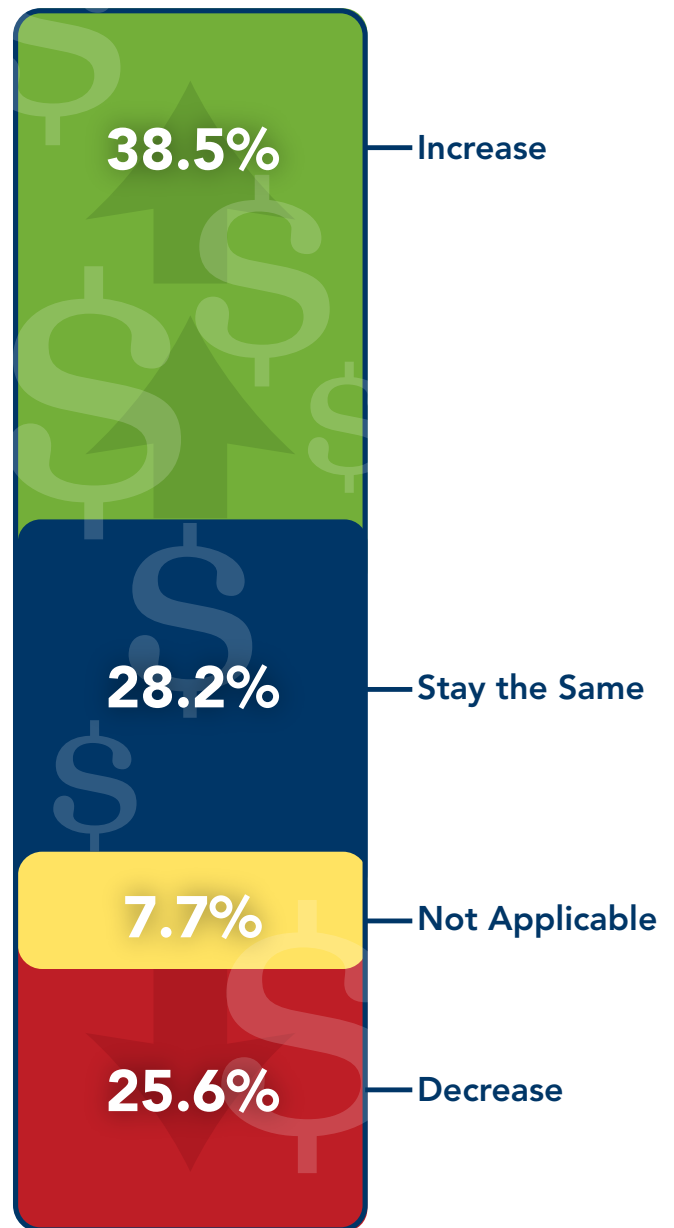
## 2012 HEALTHCARE MARKETER SURVEY RESULTS

### At Beacon...WE HEAR YOU!

We asked you to share the major issues and trends that are most affecting your brands. We've taken the time to listen so we can deliver the best possible solutions specifically designed for your brand, your challenges, and your customers. And thanks to your responses, here's what we heard.



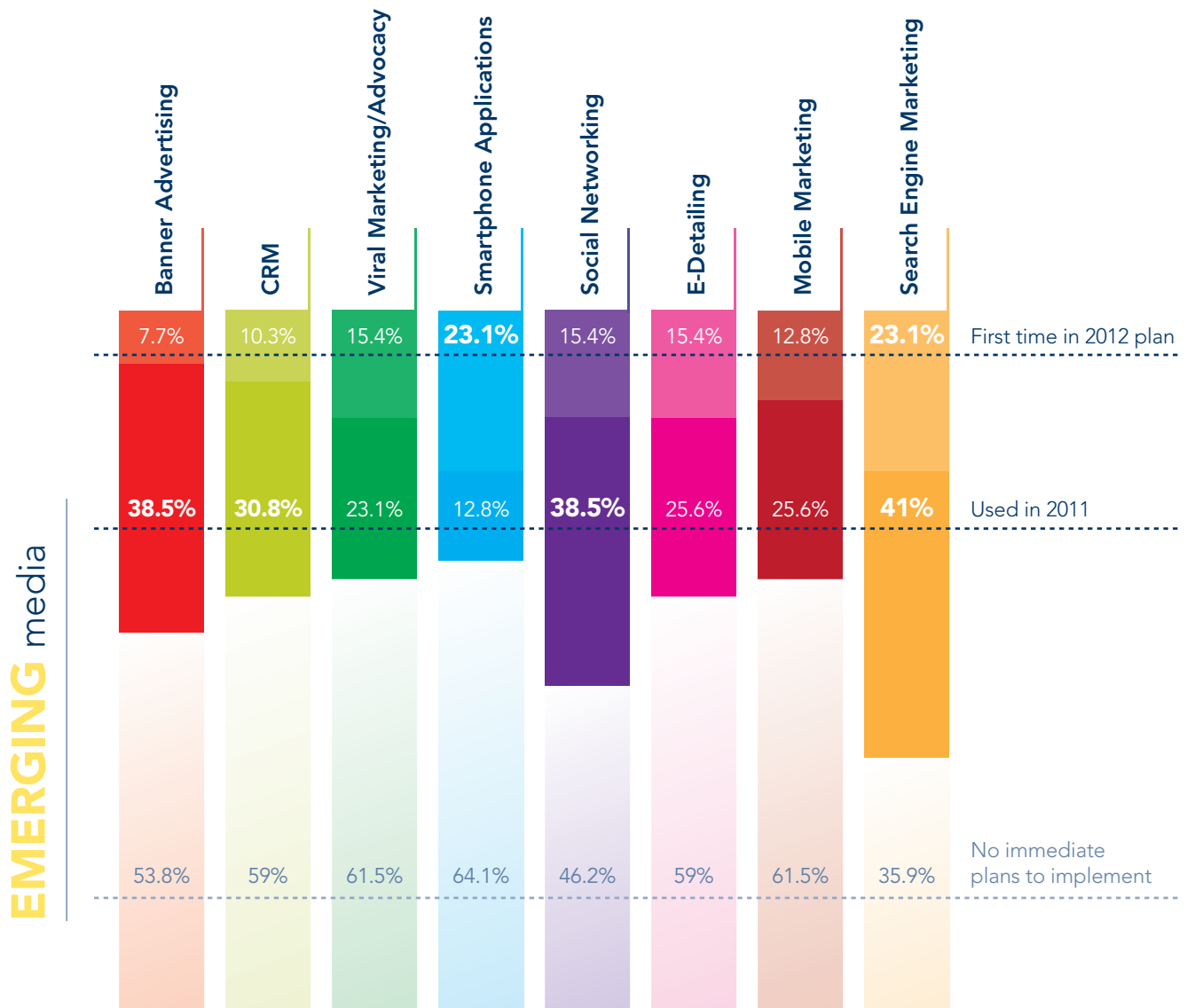
VS.



2012 marketing budget

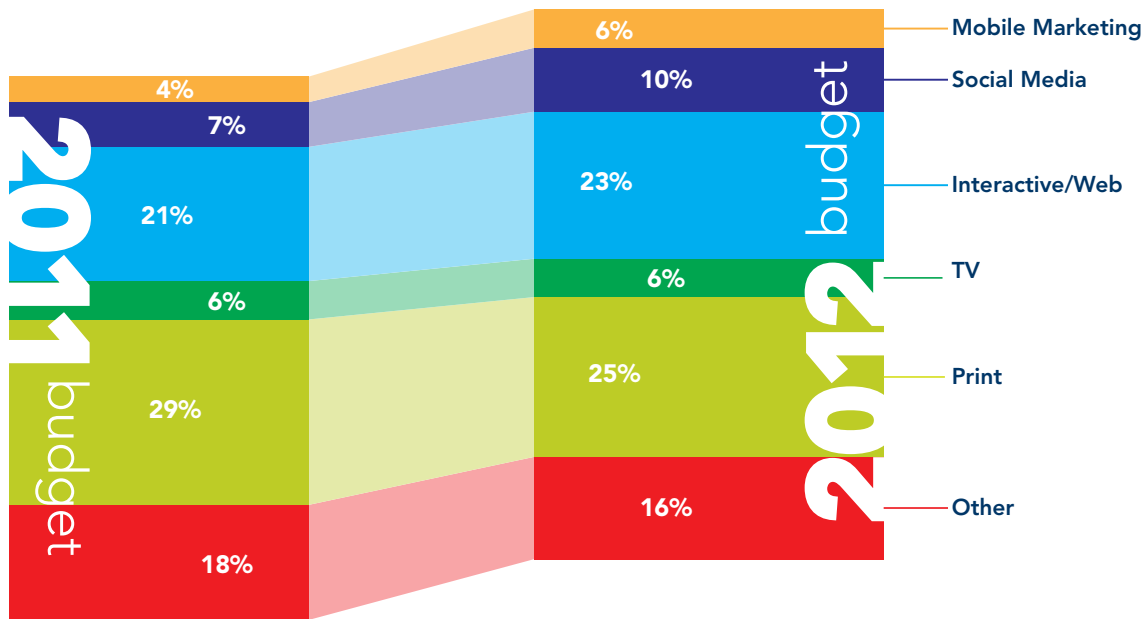
## Marketers Remain Hopeful of Budget Increases in 2012

In 2011, three quarters of you and your colleagues saw decreases or no change in your marketing budgets compared to what was originally planned. Only 18% received more marketing dollars than was initially expected at the beginning of the year. However, many of you remain optimistic, with 39% expecting a larger marketing budget and only one quarter expecting a budget decrease next year.



## Digital Media Is Slowly Being Integrated Into Your Marketing Mix

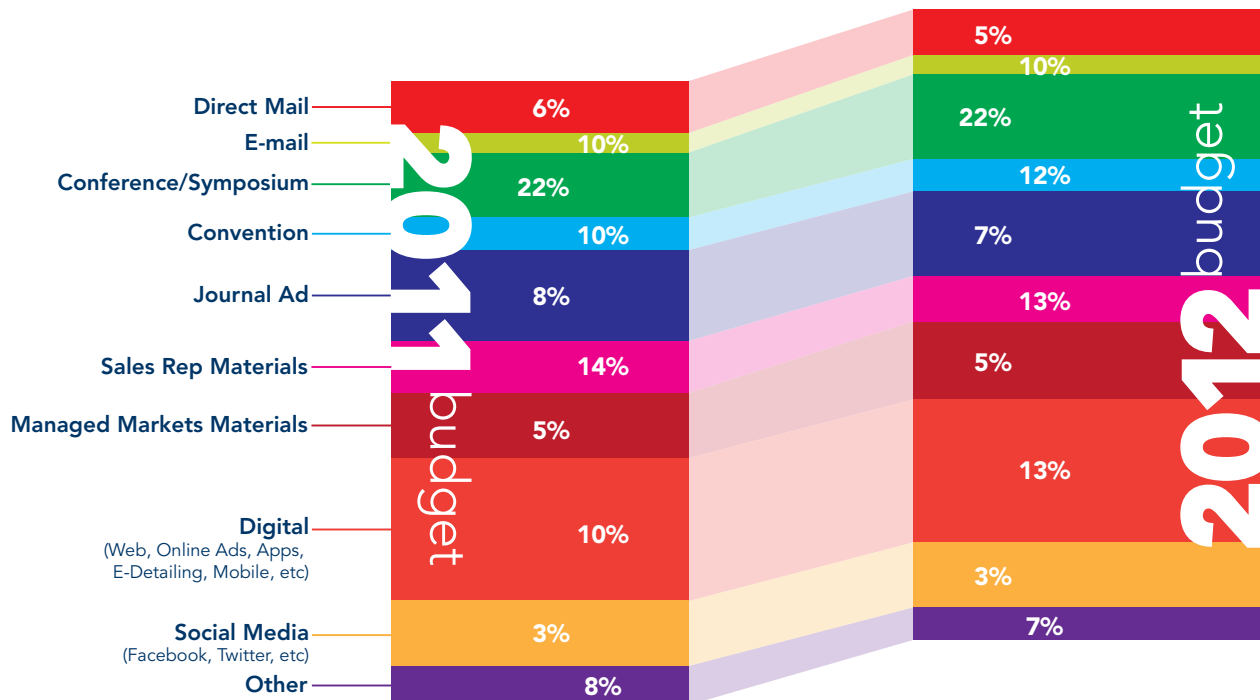
Due to economic constraints, digital media has been utilized less in the past year than previously planned. Search engine marketing (SEM), social media, and banner advertising are among the most commonly used digital channels. SEM and Smartphone applications will be the most widely adopted new media in 2012, with about one quarter of you planning to use them for the first time.



## CONSUMER channels

Budgets are continuing to make a slow yet steady transition away from print and into digital/interactive media. Allocations for Web, mobile, and social media are all increasing by 2%–3% in 2012, while consumer print, professional journal ads, and sales rep materials are decreasing by 1%–4%.

## PROFESSIONAL channels



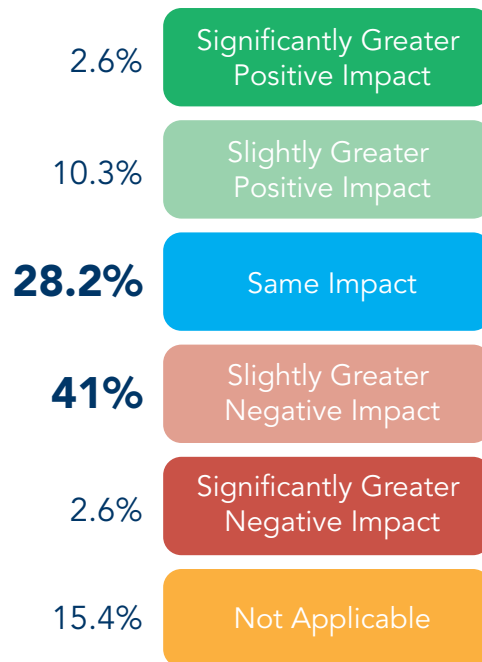


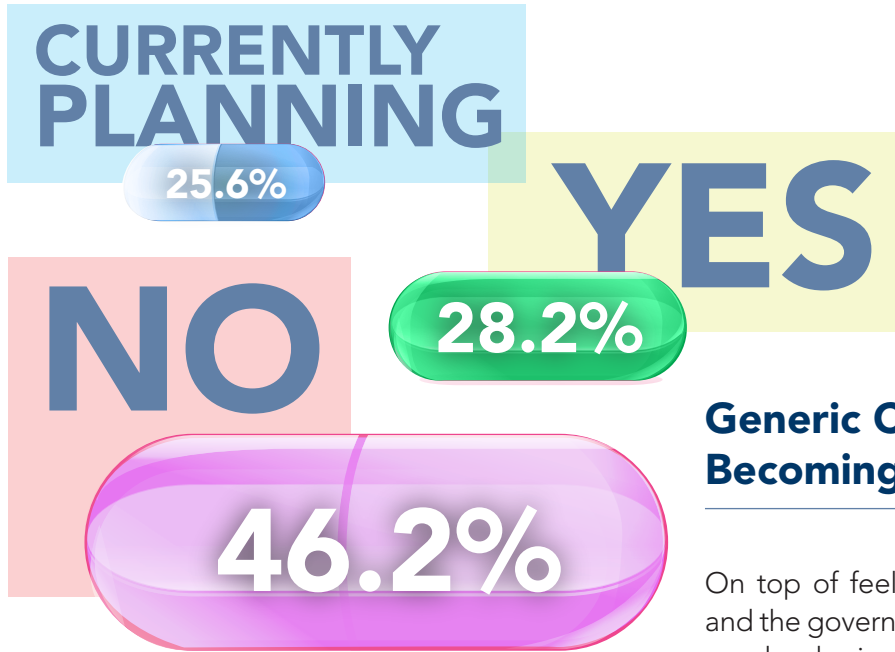
## DDMAC Regulations Remain a Challenge

Three quarters of you and your colleagues foresee DDMAC regulations having the same impact on your ability to market your brand in 2012 as they did in the previous year. Only 21% see the regulations as having a greater impact next year. This is a small shift from last year when a greater number of you saw this as a growing issue. Even if the effect of regulatory control isn't at the forefront as in previous years, it certainly remains an ongoing challenge.

## Healthcare Reform Continues to Impact Brands

The majority of you expect healthcare reform to impact you differently in 2012 compared to 2011. Almost half expect a more negative impact from healthcare reform, while most expect that impact to be mild.



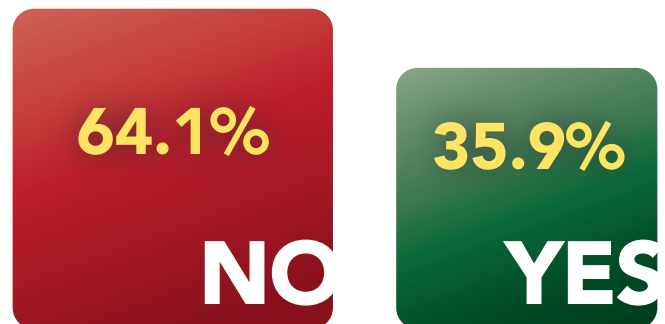


### Generic Competition Is Becoming an Added Challenge

On top of feeling external pressure from the FDA and the government, over half of you already have or are developing plans to deal with increased generic competition. Almost three quarters of you, however, do not yet have a plan in place.

### Marketers Using Unbranded Campaigns Are the Minority

Unbranded/disease awareness campaigns are currently being considered by a little more than one third of you to further build your brand in 2012. On the other hand, the majority of you are not planning to use unbranded communications in the coming year.



## Summary

---

Marketing your brands continues to be a challenge due to shrinking budgets and external factors such as FDA regulation, federal legislation, and generic competition. Marketers are adapting to this changing environment by continuing to slowly invest in digital media channels, including Web, mobile, and social media marketing, often doing so at the expense of more traditional forms of advertising.

## We Hear You...

---

At Beacon, we have a dedicated Strategic Insights & Planning team that has its finger on the pulse of the industry. Our rich understanding enables us to guide our clients through the challenges of today's pharmaceutical marketplace. We understand what you're going through, because we've been there too...in professional, managed markets, DTC and interactive. Talk to the agency that knows how to listen. Call Adrienne Lee at (908) 781-2600 or send her an e-mail at [alee@beaconhc.com](mailto:alee@beaconhc.com).