



Driving Clinician Engagement Through mHealth

Presented by:

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Agenda

- The mHealth Landscape
- Emerging advances in mobile technology and marketing channels
- How life science companies can leverage mHealth to engage healthcare providers



Some Numbers to Consider (Race to 50 M)

After Guttenberg invented movable type it took more than **100 years** for the number of users of print to reach 50 million.

On the contrary:

- It took radio **38 years** to reach 50 million users
- It took television **13 years** to reach 50 million users
- It took the Internet **4 years** to reach 50 million users
- It took the iPod **3 years** to reach 50 million users

But then:

- Facebook added 100 million users in less than **9 months**
- iPhone application downloads hit 1 billion in **9 months**
- **mHealth apps available in the Apple AppStore, Android Market and Blackberry AppWorld grew an average 121% in just 8 months¹**

The mHealth Landscape

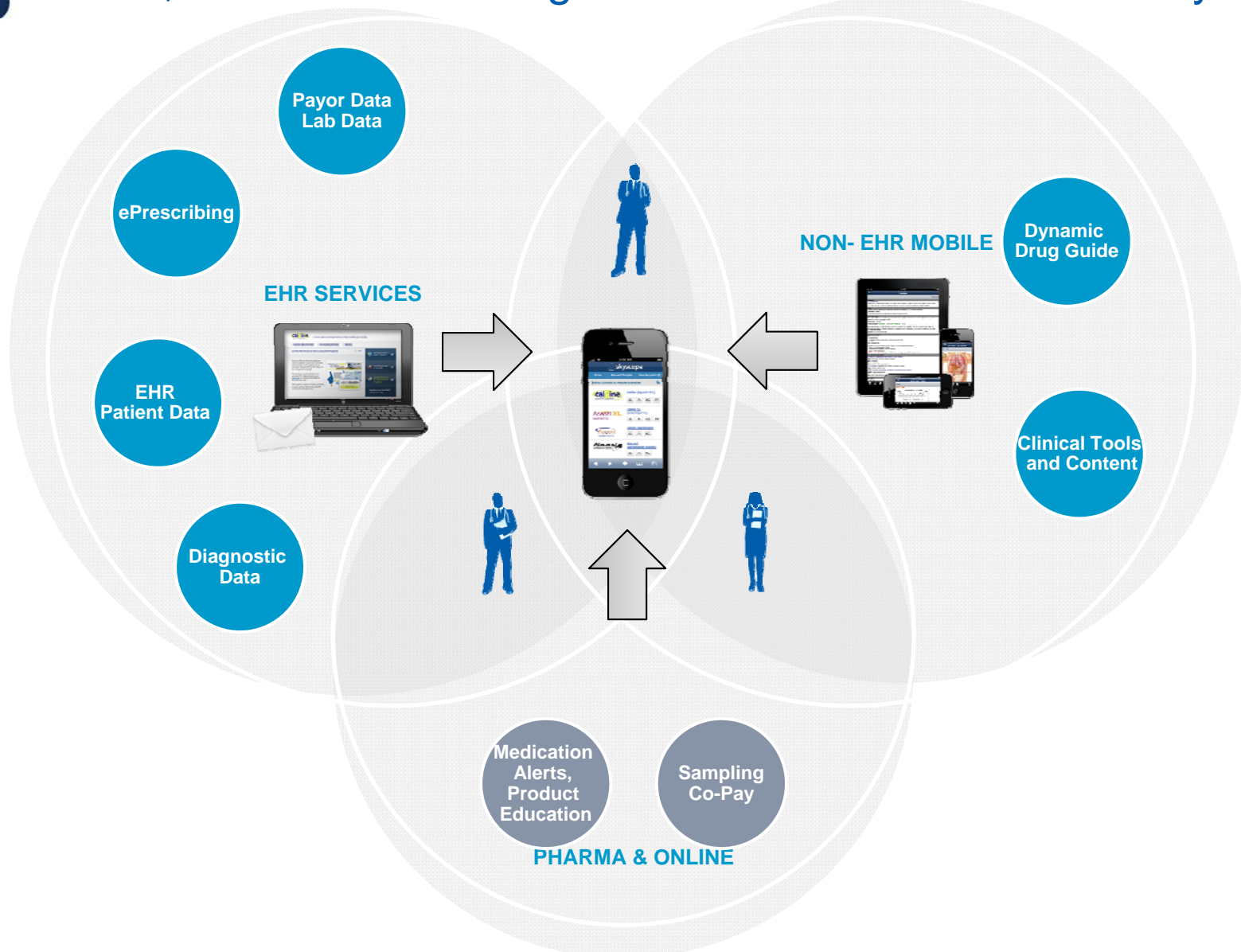


- mHealth market - 17% year-over-year growth rate between 2010 and 2011¹
- 500 million Smartphone users, at least one mHealth app by 2015²
- By 2014 HCPs could save between \$1.96 billion and \$5.83 billion in healthcare costs using mHealth³
- Close to half (43%) mHealth apps are designed for healthcare providers²

1. RNCOS Research Firm, 2011
2. Research2Guidance, 2011
3. Juniper Research Report, April 2010



Changing Workflow Landscape: Mobile, EHR/eRx Convergence Increased HCP Efficiency





mHealth Trends for Healthcare Providers



Physicians Use Mobile Devices Professionally

73% of physicians look up drug and reference material on their smartphone or tablet¹

Apps providing timely and relevant clinical information including:

- Evidence-based and clinical research updates
- Journal article abstracts
- Drug and patient safety information

News Alerts

Mobile resource centers

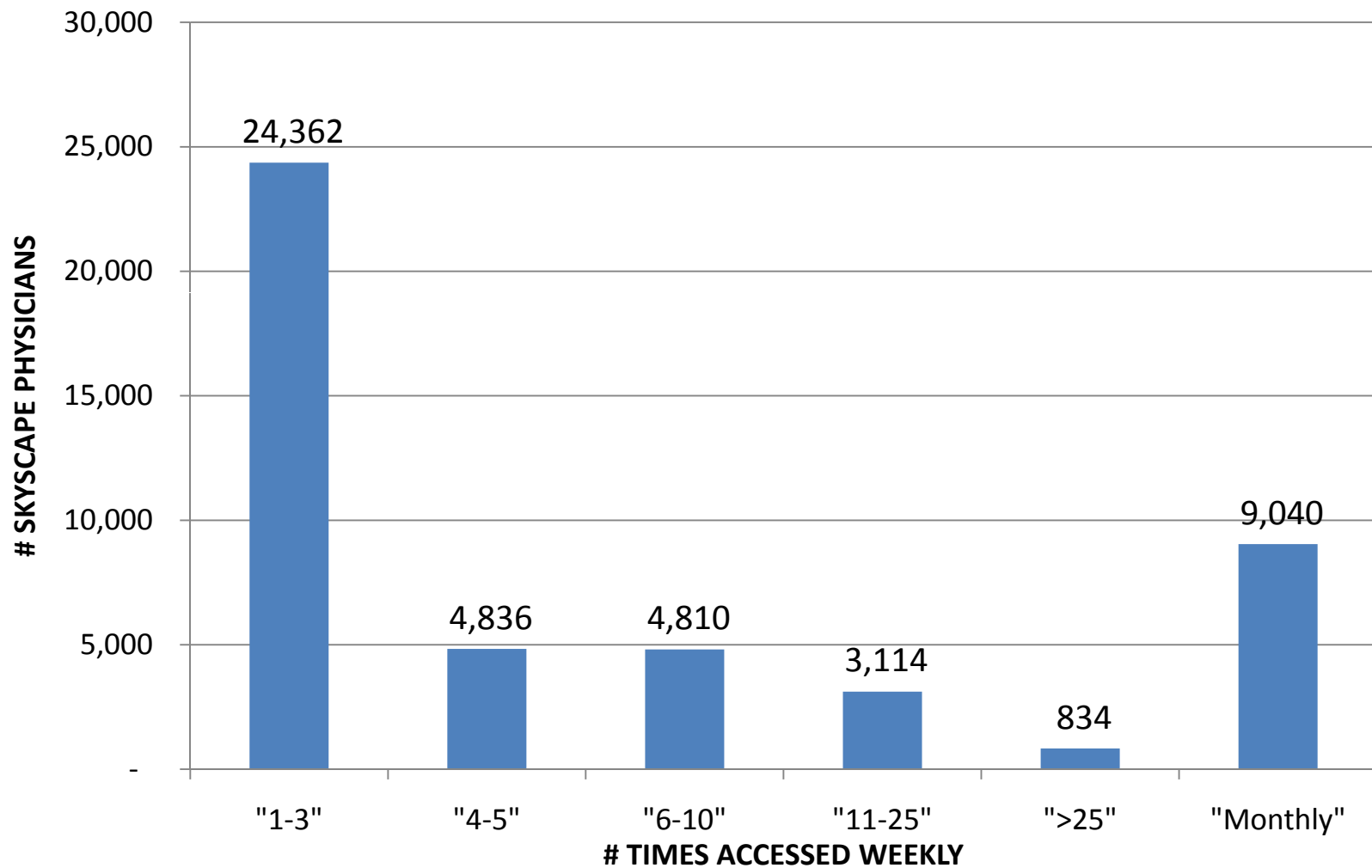
Mobile eDetails



1. eMarketer, "Prescriptions for Health and Wellness on the Go", 2011



Mobile Is Part of Weekly Workflow for Clinicians: U.S. Physicians Weekly Use of Skyscape Mobile Clinical Reference Content (2011)



Case Example: Mobile mDetail “Choice,” coupled w/Traditional eDetail, Becomes Preferred Channel

Goal

Increase market share and physician engagement for seasonal product; deliver 3,000 participations within 3 mos.

Targets

General practitioners and family practice physicians

Program Design

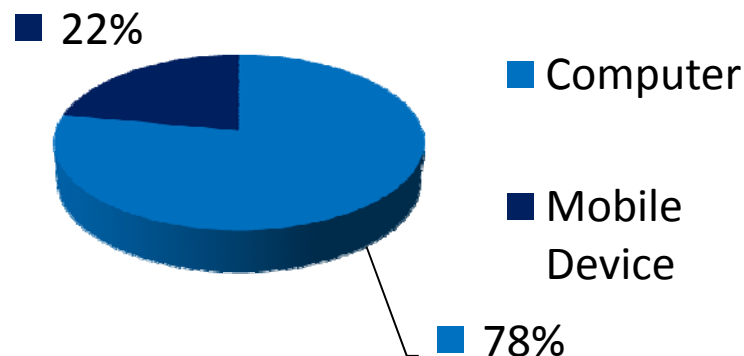
2 eDetail programs and 2 mDetail programs

Call to Action:

Sponsored mobile clinical reference content or a medical journal subscription



Completion by Device



Pharma Turning to eSampling to Better Service HCPs

HCP Concerns

- 58% of prescribing doctors fall into rep-friendly category, down from 71%¹
- 83% HCPs interested in eSampling²
- Workflow Technology Adoption
- Online, EHR adoption, Mobile

Pharma Pressures

- Declining # of sales reps
- Formulary challenges
- Forced to do more with less
- Small & mid-tier Pharma leveling playing field with non-personal

Environmental Factors Creates Opportunity

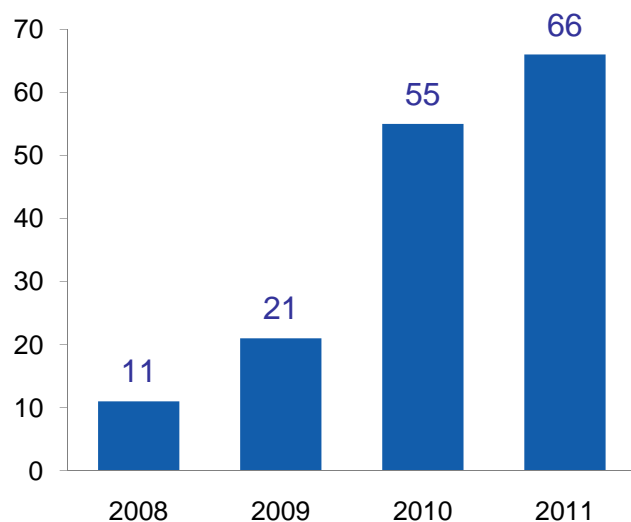
1. *WSJ, May 6, 2010
More Doctors Giving Pharma Sales Reps the Cold Shoulder*
2. *Skyscape Inc.com, 2011*



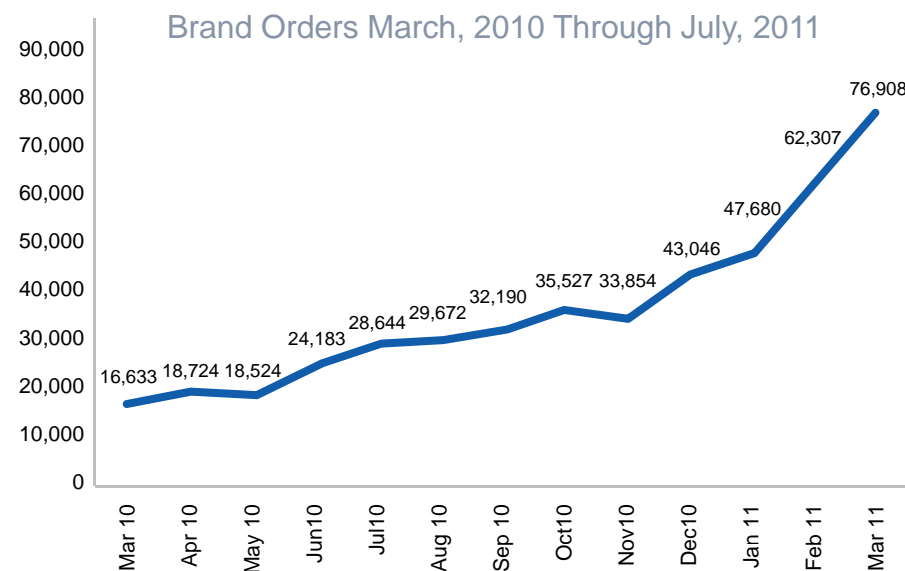
eSampling is on the Rise (Distributed Model)

- Physician requests up over 365% (January 2010 vs. July 2011)
- The average number of brands available per HCP = 6.6
- Emerging - co-pay coupon orders, print on-demand access

Brand Participation will eclipse 80 by 12/31/11



Sample Orders Continue to Rise



2011 Trending: Mobile Sampling Expansion

- 67.5% of SmartPhone responders request samples on mobile
- 71% of HCPs reported being the primary source for ordering samples in practice
- Integrated Delivery
 - Coupon/Rebate Access
 - Messaging
 - mDetailing
 - Drug Guide Integration
 - Signature Capture
 - other...





Digital and Mobile Ad Spend

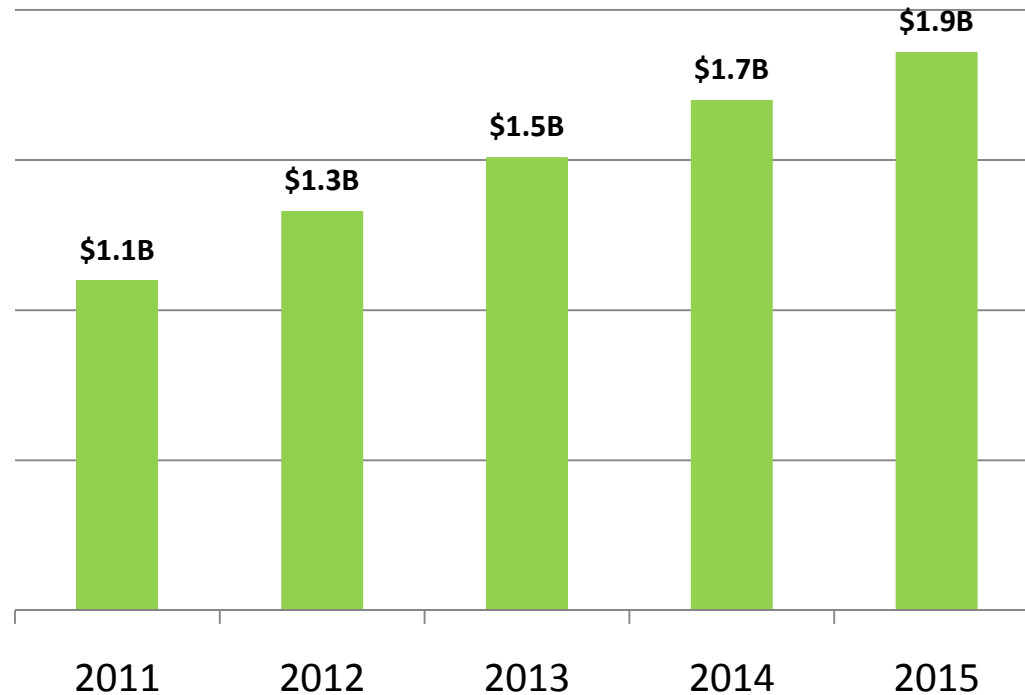


Current Environment and Key Trends

“77% of pharmaceutical executives questioned expect marketing managers to spend more on digital activities over the next 12 months.”

Healthcare and Pharma US Online Ad Spending

■ US dollars in billions

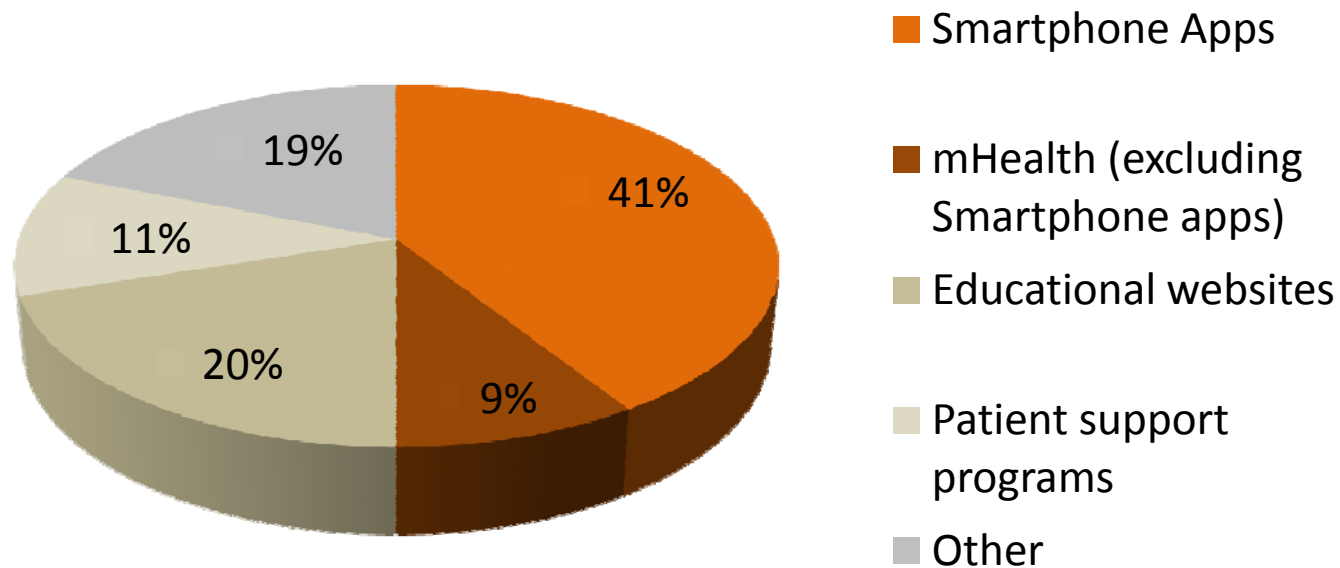




Mobile Healthcare Spend

In 2010, pharmaceutical company investment in mobile apps accounted for 50% of new initiatives¹.

Pharmaceutical Investment in Smartphone Apps in 2010



1. eMarketer, "Prescriptions for Health and Wellness on the Go", 2011

Cross-Platform mHealth HCP Messaging

Tomorrow Networks™ HCP Focused Mobile Ad Platform



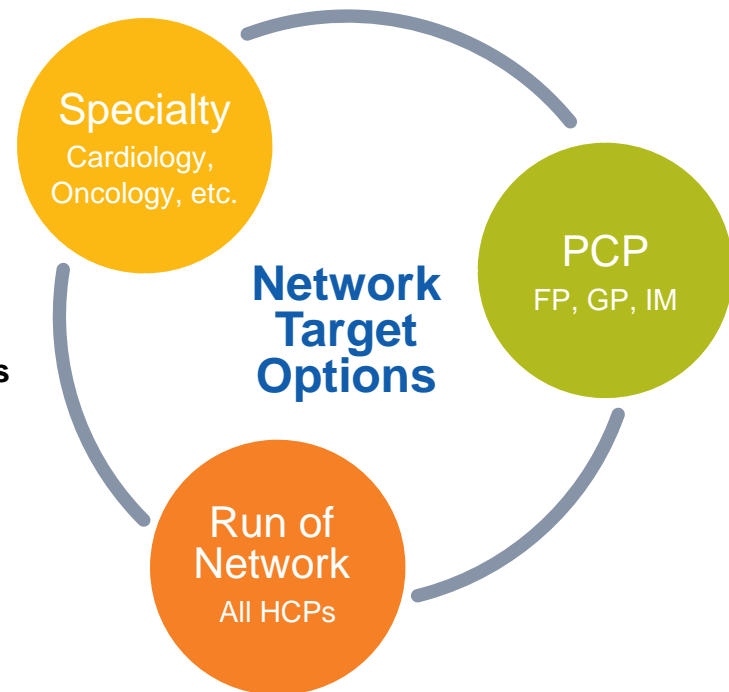
Tomorrow Networks is:

- Over 52 medical apps
- Used by 220,000+ medical professionals
- Wide range of specialties and interests
- Targeted by:
 - Profession
 - Specialty
 - Geography



Comprised of High Quality HCP Medical Apps

- Skyscape
- NIH Stroke Scale
- Stat Asthma Guidelines
- CDC Vaccine Schedule
- ICD (Consult 2011)
- Stat Heritage
- Stat Insulin DM2





mHealth, Above and Beyond



Health eVillages

mHealth “Beyond the Pill” What Can We Be On Our Best Day?

Health eVillages: Bringing mobile clinical reference to practitioners in need, anywhere, anytime





Thank You

Physicians Interactive

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