

**PHARMA IN FOCUS WHITE PAPER**  
**MARKETING IN AUSTRALIAN PHARMACEUTICAL COMPANIES 2015/16**  
**OCTOBER 2016**

**Overview**

Marketing is an important function in Australian pharmaceutical companies. For the first time, *Pharma in Focus* has researched marketing from within pharmaceutical companies and among the external service agencies providing marketing services to pharmaceutical companies. This Whitepaper examines satisfaction and service levels on both sides, revealing interesting insights into expectations and issues for marketing people working for Australian pharmacos and the consultants working in marketing agencies servicing Australian pharma.

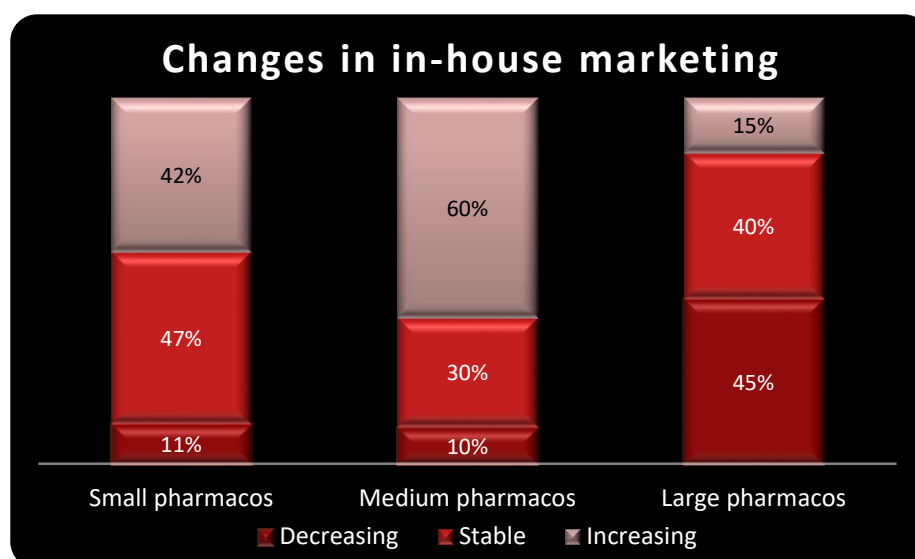
**KEY FINDINGS**

- Marketing teams were relatively stable in 2015/16 although redundancies were up in large pharmacos; 83 per cent of respondents from Big Pharma noticed higher rates of redundancy.
- The service providers in pharma marketing most in demand in 2015/16 provided data purchasing/analysis, market research and product marketing services.
- Pharma marketers and their management teams doubted their patient-centricity; one in three marketers and one in four managers felt their company failed to focus on the patient.
- Two in five sales staff felt their marketing team had failed to establish positive relationships with HCPs and patients.
- Event management companies held the highest satisfaction rating from pharma; 82 per cent of pharma clients were satisfied with their event management provider.
- Patient engagement agencies have the greatest problem with communication -most pharma clients are dissatisfied.
- Use of web development agencies is the fastest growth service sector for pharma – 69 per cent of pharma respondents increased their use of web services in 2015/16.
- Digital and data services were the greatest beneficiaries of pharma budget increases.
- Small and medium sized pharmacos are expanding their budgets for web/SFE services.
- Product launches were the most common service required by pharma.
- Pharma companies first and foremost want value for money from their service agencies.
- Pharma companies place little value on creative solutions, preferring a 'tried and tested' approach.
- Marketing agencies who have only a satisfactory relationship with their pharma clients are also not experiencing growth from this sector and are likely to be focusing on the wrong service qualities.
- Agencies working with pharma say the MA Code significantly impacts their work with pharma.

## PART 1: IN-HOUSE MARKETING

### Marketing staffing

For half of in-house marketing teams, the 2015/16 FY was similar to the previous FY with little change in the number of people in their team working within the marketing function. Only one in four people working in marketing noted a reduction in marketing staff in their company, whereas 28 per cent noted their marketing team had grown when compared with the 2014/15 FY.



For companies that had experienced a reduction, it was not surprising that redundancies were higher than usual in their company, although again for the majority of marketing people (71 per cent) they had experienced no change in staff numbers or redundancies.

Reductions in marketing teams predominantly occurred in large branded prescription companies where 83 per cent of staff noted a higher level of redundancies. The remaining 17 per cent of reductions were in small pharmacos.

### Marketing budgets

Reductions in staff and higher levels of redundancies were found to go hand-in-hand with budget cuts for marketing teams, although many teams had cuts without losing staff. Overall, 41 per cent of marketing respondents noted a reduction in their budgets in 2015/16 when compared with the 2014/15 FY. All budget cuts were in branded prescription companies, and again predominantly in the large companies.

### Marketing effectiveness

#### Brand promotion

While most people working in Australian pharma believed their marketing function was successful in promoting their company brands, sales and marketing staff tended to be less positive about their abilities. While 57 per cent of respondents rated the marketing department as somewhat or highly

successful in promoting their brands, this fell to 37 per cent for respondents working in sales and marketing.

#### Building positive relationships

When it came to building positive relationships with healthcare professionals (HCPs) and patients, marketing people were more confident in their abilities with 57 per cent rating themselves positively compared with 48 per cent of non-marketing people. However, non-marketing people were polarised in their opinions of this factor – 37 per cent felt their marketing team failed to build positive relationships with HCPs and patients. Most scathing was sales staff working at the coalface – 42 per cent felt their marketing teams failed in establishing positive relationships with HCPs and patients.



#### Patient-centric approach

The third factor considered was marketing teams' ability to focus on the patient. With a stronger focus on patient-centricity in recent years, the ability of the marketing function to focus on the patient was considered an important part of what they do. Analysis found marketing people were not confident about their ability to focus on the patient; while 54 per cent felt they did this successfully, one in three (33 per cent) felt their company failed in achieving this important goal.

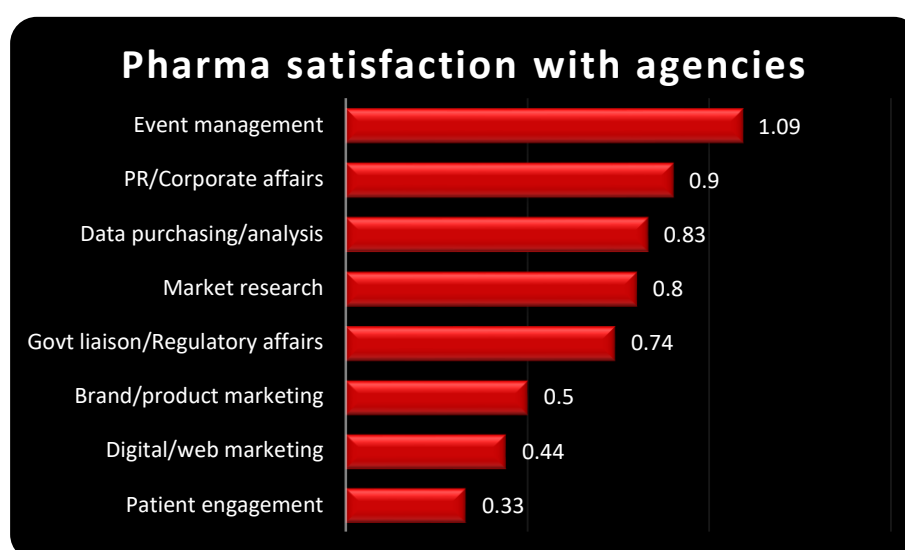
Outside of marketing, respondents were more positive about this factor with 63 per cent believing their marketing function succeeded in patient centricity; 26 per cent said they did not. Those employed in management were the most critical of marketing in this regard - two in three marked their marketing departments as unsuccessful in achieving a patient-centric approach.

## USE OF SERVICE PROVIDERS

Of the external contract services provided to pharma companies, respondents indicated the most utilised service providers were in data purchasing and analysis, market research and brand or product marketing.

### Agency satisfaction

When it came to satisfaction, event management companies had the highest satisfaction rating with 82 per cent of pharma clients rating themselves as satisfied with their event management companies, half of these saying they were highly satisfied. This equated to a satisfaction score of 1.09.



PR and corporate affairs companies also scored an exceptionally high satisfaction rating from pharmacos, with 70 per cent satisfied and only five per cent dissatisfied giving them a score of 0.9.

Data purchasing and analysis agencies, market research and government liaison/regulatory affairs agencies also scored above average approval ratings from their clients.

Patient engagement and digital/web marketing agencies scored the highest dissatisfaction rating from their pharma clients. One in three pharmacos was dissatisfied with their digital marketing agency; one in two reported being satisfied to some degree with their digital marketing provider.

Product marketing agencies also had divided responses with more than one in four clients somewhat dissatisfied with their services and 60 per cent satisfied.

### Agency communication

When it came to communicating with their pharma clients, event management companies again came out on top with 68 per cent of pharmacos marking them as very good or excellent in their communication and the remainder giving them a satisfactory score.

Market research companies were considered excellent in communicating with their pharma clients; 65 per cent of pharma respondents rated communication with these agencies as very good or excellent.

When it came to data purchasing and product marketing, one in two pharma clients rated the client communication as very good or excellent with few respondents rating it negatively.

In contrast, digital/web marketing agencies had the highest disapproval rating; 36 per cent of client respondents indicated their digital agency was either 'not great' or 'poor' at communicating.

Patient engagement and government liaison/regulatory affairs agencies also had a high disapproval rating; one in four pharma clients was unhappy with their communication. Patient engagement agencies in particular struggled to satisfy most of their clients, indicating a problem with their client communication and signalling a need for improvement.



"Most of our government liaison/regulatory affairs influence is via Medicines Australia - which is proving ineffective," said one branded pharmaco government/regulatory affairs manager.

"Many of these functions are done in house ... but external providers to date have been very good on the whole," said another Big Pharma respondent.

### Changing use of agencies

Despite pharmaco dissatisfaction with the service being provided by many web/digital agencies, use of web development services was the fastest growth sector for the industry. More than two-thirds of company-based respondents (69 per cent) had increased their use of web development services in 2015/16 with one in four saying this increase had been significant in their use of both website and social media services from external contract providers.

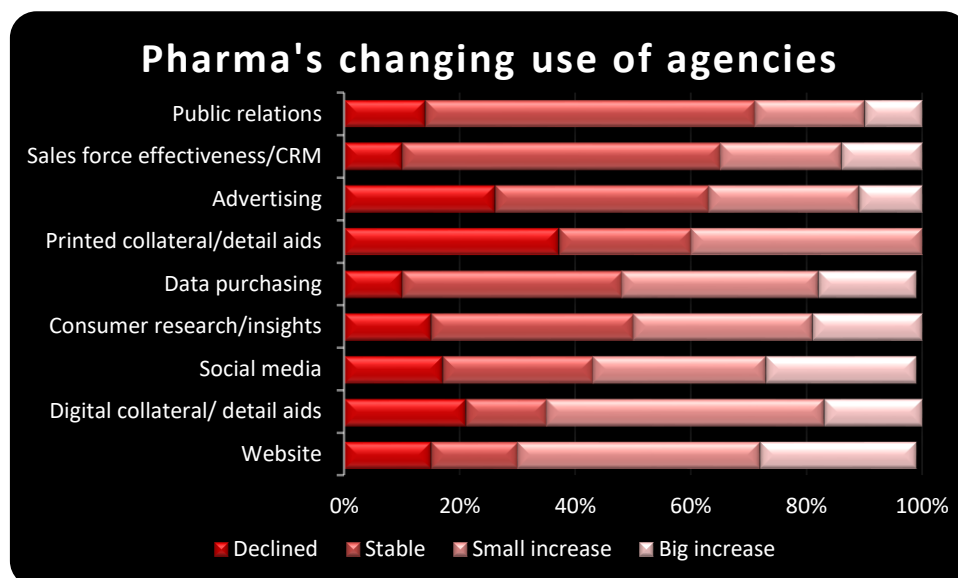
This growing need for Aussie pharmacos to develop and maintain a strong online presence was evident in their comments, although there appeared to be an expectation gap given digital agencies

had the second highest dissatisfaction rating of all agency providers and the highest dissatisfaction rating for client communication.

Agencies providing digital collateral and detail aids also experienced strong demand from pharma companies with 65 per cent of pharmacos increasing their use of these agencies in 2015/16. Consequently, pharmacos were reducing their requirement for agencies providing printed collateral and detail aids

Traditional advertising agencies were also progressively being transitioned out of the marketing mix while public relations and sales force effectiveness agencies were holding their own.

“I'm finding a strong shift to the new, different and creative in the last 12 months and a need to be 'digital',” said one advertising executive, summing up the shift in the use of agencies.

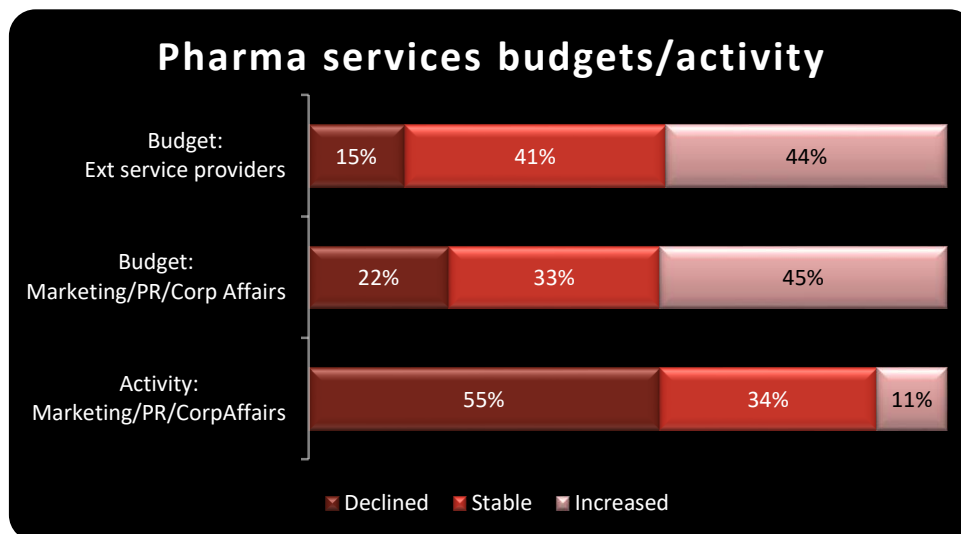


## Marketing/Corporate Affairs budgets and activity

In 2015/16, marketing and corporate affairs activity was reported to increase in 55 per cent of pharma companies, although most reported growth of less than 15 per cent. Much of this growth was found in the smaller companies; 44 per cent of large company respondents reported no change over the 2014/15 year. Very few pharmaco respondents noted a reduction in activity.

When it came to budgets, a third of respondents had again experienced no change in budgets while a further third had seen budget growth of less than 15 per cent between 2014/15 and 2015/16. In large pharma companies, 28 per cent of respondents noted their budgets for marketing and corporate affairs had been cut in 2015/16 compared with 18 per cent of smaller pharmacos.

Overall, budgets for external service providers were slightly fatter in 2015/16 than in the previous year, with 44 per cent of respondents reporting they had more money to spend on service providers and 41 per cent the same amount as the previous year.



### Areas of growth

Digital and data services were found to be the greatest beneficiaries of pharma budget increases with 57 per cent of pharma-employed respondents noting their company had increased expenditure on data purchasing and digital collateral while 58 per cent had increased their web activity.

Web development was found to be absorbing the biggest share of budget increases — one in two companies spent more on their website in 2015/16 than they did in 2014/15, with much of this growth coming from the branded SME sector. SME budgets for sales force effectiveness were also expanding.

While SMEs were focusing on their websites (66%) and data (60%), big pharma was more focused on increasing digital collateral (65%) and data purchasing (50%). Big Pharma budgets focused on digital collateral, data purchasing and web development.

Sales force effectiveness continues to be a strong focus for pharmacos, with 47 per cent of respondents noting an increase in SFE activity in 2015/16.

Consumer research/insights, social media and public relations are areas of pharma where activity has stabilised – almost 60 per cent of respondents reported no change.

### Areas of decline

As the corporate focus swung progressively towards digital, it was also swinging away from areas such as traditional advertising and printed collateral. One in four (26 per cent) company respondents said their marketing team had a budget for printed collateral while 32 per cent were cutting advertising budgets and activity in favour of digital.

## ***What they said***

When asked to comment on the current environment for marketing pharmaceuticals, company respondents raised a range of issues including:

- procurement putting pressure on budgets;
- a growing need for accountability;
- pressure to comply with the Medicines Australia Code of Conduct; and
- difficulties championing innovative medicines in an environment where consumers were increasingly encouraged to select a generic.

These themes ran through the large number of comments made not just by company respondents but also with the consultants working with them. Both sides of pharma marketing recognised that they were operating in extremely challenging circumstances.

“We are required to be a lot more accountable for every dollar spent,” said one company departmental head. “Providers need to come with clear and established KPIs for demonstrating ROI.”

“I think most of us are being expected to do a lot more with a lot less spend which is reflected across many areas of industry,” said a senior marketing manager working for a large branded pharmaceutical company. “While I see the value of Medicines Australia in providing some structure to the marketing activities and relationships between companies and HCPs, I think it can be unrealistically restrictive in many respects. HCPs that are very anti-pharma marketing appear to have a larger voice than their numbers actually indicate and may do their colleagues a disservice in many ways.”

The challenge of combating the push for generics was reflected in the comments of a sales rep working in the field: “Marketing has had to increase a presence for brands in the marketplace to combat the huge swing to generics and to follow media trends like the anti-codeine campaign to solidify growth of other pain treatments.”

The challenges for reps were further reflected in the comments made by another working in sales. “Tailoring a conversational call to a particular GP who has specific and varied patient results is a very varied and unique conversation and discussion (if you do it right),” they said. “Giving every rep in the country the same detail aid is redundant and ineffective.”

In this complicated environment, several marketing managers commented on how moving increasingly into the digital space was adding to this challenge.

“Pharma is trying to engage more in digital and social marketing with mixed success,” said a senior marketing manager working for a mid-sized pharmaco. “Consumer expectation is high based on non-pharma interaction with brands and industry is slow to catch up due to [its] conservative nature and [industry] regulation.”



## **PART 2: EXTERNAL SERVICE PROVIDERS**

People working for service agencies with pharmaceutical clients in Australia were also included in the *Pharma In Focus* marketing survey to examine their experience in service provision. In total, 45 agency responses were received from consultants working for agencies, most with more than 10 pharma clients. All agencies earned in excess of \$100,000 annually from pharmacos with the majority earning more than \$500,000 annually.

### **Pharmaco/agency relationships**

Overall, service agencies partnering with the Australian pharmaceutical industry were satisfied with the relationship they had established with their clients; 89 per cent rated their relationships as either 'very good' or 'excellent'. The remaining 11 per cent rated their client/agency relationship as 'satisfactory'.

The increasing reliance on agencies for pharma marketing was evident in that one in three employed additional staff in the 2015/16 financial year to cater for the growing demand for services from pharma clients. A further 42 per cent had maintained existing staffing levels for their pharma clientele.

While only seven per cent of agencies were retained by pharma clients on a monthly retainer, most agency respondents (69 per cent) said they received regular contract work from their pharma clients. A further 22 per cent had irregular contracts. Given a number of agencies earning more than \$500,000 a year from pharma clients relied on contracts rather than retainers for business, contracts were evidently the most common financial arrangement between Australian pharmacos and their marketing agencies.

### **Most demanded agency services**

While pharmacos were increasingly looking for digital services, agencies said the most common service required by their pharma clients was product launches – an area in which they tended to engage agencies on a contract-by-contract basis. Marketing campaigns and strategic communications were the next most requested pharma service. Healthcare agency respondents who indicated they were kept on retainer provided all three services, indicative of their importance to Australian pharma.

Patient group engagement, marketing collateral and social media/digital campaigns were the next most requested service while those least required were media training, clinical trial recruitment, regulatory advice/government relations and medical education.

### **Agency values pharma want**

In-house procurement processes within pharma businesses has put the squeeze on marketing budgets. As a result, agencies partnering with pharmacos have felt the impact of this squeeze. Across the board, agencies rated value for money as the most important factor pharmacos looked for from their service providers in 2015/16, with almost half of agency respondents saying their clients considered value for money a key factor.

*\*Agencies were asked to rate the below features in terms of what their pharma clients valued most. The following graph shows the weighted average mark for each value; the higher the mark, the more the factor is valued by industry.*



This increasing focus on cost also saw pharmacos increase their demand for an agency with a track record of delivering, an established knowledge of the pharma industry and its specific requirements, and measurable results. More than a third of agencies listed these three factors as of the highest importance for their clients. Furthermore, one in four agencies felt their existing relationship with their client won them repeated business - breaking into Australian pharma as a new service provider would therefore be difficult.

Interestingly, agency service providers felt their clients were not seeking a point of difference among agencies but rather a mainstream service. Having “a clear point of difference from competitors” was rated the least important factor for marketing agencies in winning pharma business. Pharmacos also placed little value on ‘creative solutions’, their agencies felt, with most wanting a more traditional approach.

Of all agency service providers, those partnering in patient group engagement services found their pharma clients the most conservative and least interested in creative solutions. Pharmacos seeking patient group engagement services instead looked for measurable results and knowledge of the product and/or industry along with a proven ability from the agency to deliver.

### ***What they said***

“There has been a shift in the past five years away from strong relationship/partnerships,” said one corporate services agency. “Purchasing departments have become involved in the agency selection process and this has meant a greater focus on head-hour costs and a decline in respect for intellectual property.”

“I believe the industry finds it difficult to understand the value a good contractor can provide, especially when procurement is involved,” added a marketing consultant.

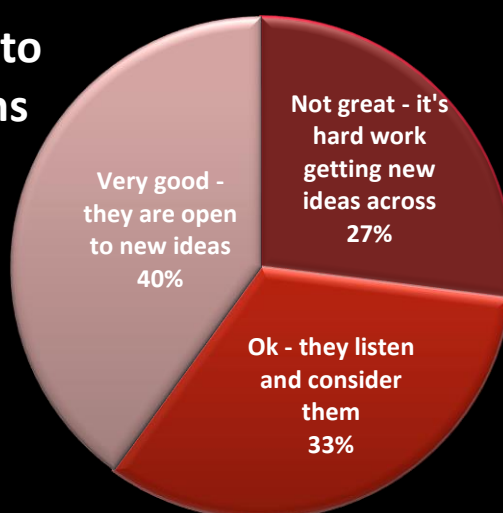
“The rationale for choice of provider is different depending on the decision maker,” said a medical communications director. “Procurement can push too hard on global contracts and pricing when getting the best team in to collaborate is more important for results.”

## Creative solutions

With the pharma industry known for its traditional approach to marketing, agencies were asked directly about their experience with their pharma clients when it came to new ideas and creative solutions. Agencies responded that devising creative solutions for pharma clients was like opening a can of worms - while their clients called for creativity in tackling problems, they usually failed to adopt any solution not previously tested and proven to succeed.

Surprisingly, 40 per cent of agency respondents found their clients were open to new ideas and a further 33 per cent said their clients would listen to and consider new ideas. For the remaining 27 per cent, their pharma clients struggled with new ideas. Interestingly, these agencies who recognised the difficulty of getting new ideas across were also the most likely to have regular contracts with pharma clients, so probably know from experience that new ideas did not usually go down well or would be quashed somewhere along the line. These companies were also predominantly involved in product launches, marketing campaigns/collateral and patient engagement, so more likely to be impacted by the industry’s fear of overstepping the MA Code of Conduct.

### Pharma attitude to creative solutions



Of all agencies services, those providing patient group engagement services found their clients the most conservative and least interested in creative solutions. Pharmacos seeking patient group engagement services instead looked for measurable results and knowledge of the product and/or industry along with a proven ability from the agency to deliver.

## ***What they said***

“You often hear that clients are looking for innovative solutions to their problems, and also ask in the same breath for examples of where it’s been done before,” said one patient engagement strategist. “Marketers are too conservative in the way they adopt new technology or communication strategies with prescribers and patients.”

“They are stuck in the past and no real innovation,” said another agency respondent, while a third added: “Many marketers are reluctant to meet service providers, and are resistant to new ideas.”

“They always say they want a big idea but never go with them,” a further agency consultant commented. “They are very conservative.”

Even those who felt their clients were open to new ideas had little to say in this regard, illustrating how good ideas rarely survived internal scrutiny.

“Pharma clients are really open to creative ideas to better engage with their audience, however the creative approach must meet the restricted criteria set by Medicines Australia and pharmacovigilance and be relevant to bring the most valuable insights,” said a medical communications consultant. “Hence why many of them like to play it safe and go for a more traditional approach which they know works and meets their needs.”

A consultant working with market data also commented on the problems created by internal scrutiny. “They want to be cutting edge yet when it comes to executions, their internal governance washes it all down. They lack courage and conviction in what they do. They tend to play very safe!”

“They always say they want a big idea but never go with them,” said another. “They are very conservative.”

## **Keys to agency growth**

*Pharma in Focus* analysed agencies that were prospering from their pharma clients in the current environment and compared their experience with that of agencies not as successful. A direct correlation was noted between agency respondents who rated their relationship with their pharma clients as only satisfactory and business growth from the pharma sector.

Despite most of these agencies earning more than \$500k annually from their pharma clients, none had grown in terms of staffing in the 2015/16 year. Many were servicing companies dealing in complementary healthcare/vitamins and these agencies were also found to be much more likely to rely on irregular contracts than those agencies who had more positive relationships with their clients. For agencies who had either very good/excellent relationships, 40 per cent were growing directly as a result of increased demand from their pharma clients.

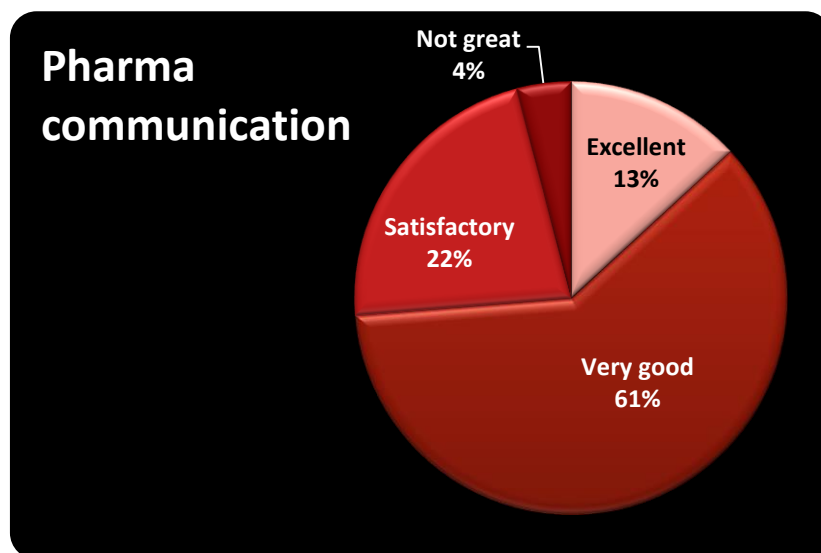
A different focus was also noted between agencies which were growing and those which were stagnant. Agencies failing to thrive believed their clients predominantly wanted timely responses, a relationship with the agency, value for money and strong industry knowledge.

In comparison, agencies who were growing and thriving in the industry felt clients wanted value for money, a proven ability to deliver, industry knowledge and measurable results.

## Communication

Poor agency-client relationships and stagnant growth in agencies were directly linked to a sense of poor communication between pharmacos and their agencies, in the opinion of the consultants. Three in five agency respondents who rated their client relationship as only satisfactory also felt communication with their pharma clients was average. The remainder rated it as 'good' but none felt it was very good or excellent.

For growing agencies, three in four rated their communication with their pharma clients as being positive, with only a quarter rating it as 'satisfactory' or 'not great'.



## What they said

"Open communication over the long term delivers the best results," said one consultant, while another agreed: "Not always clear on the brief but regular communication keeps things on track."

"[Communication] varies from excellent to not great but usually very good," said another.

Consultants also commented on problems in dealing with pharma clients, particularly in relation to email communication and time constraints.

"It is common for some companies to be really poor at returning phone calls and emails, to the extent of making projects exceed deadlines," said one consultant, while a small digital communications agency provider commented that "email response times [are] breaking down on both sides. Everyone is time poor."

"The marketing team is very time poor and you have to take on responsibility to move their projects along to meet timelines," said a third consultant.

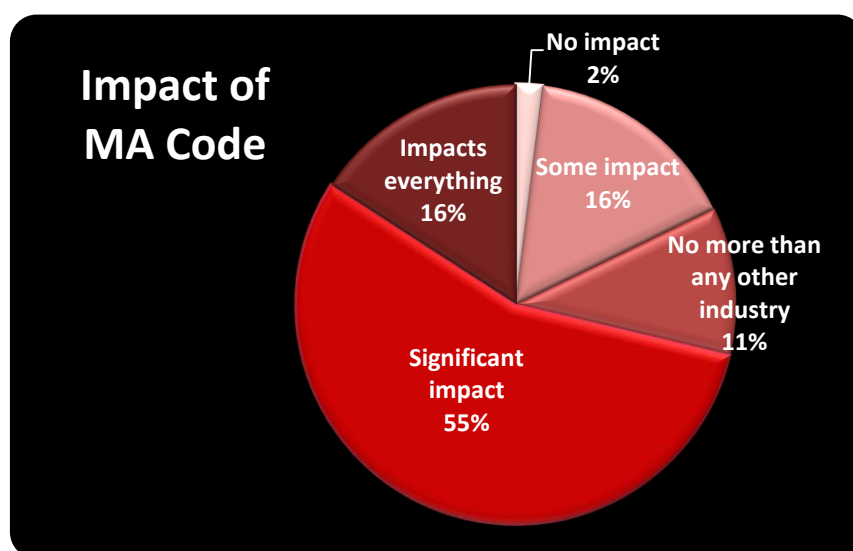
A medical communications consultancy lamented: “I wish they would share more of what else is going on for the brand.”

## Working within the Code

Agencies working with pharma were highly aware of the high impact of specific rules and regulations which govern the Australian pharmaceutical industry, with 71 per cent saying it either had a “significant impact” on their service or “impacted everything”.

While the difficulties of working within the constraints of the Medicines Australia Code of Conduct was a common theme among both pharma companies and their agencies, the Code proved most challenging for agencies already struggling in the pharma stratosphere. “Medicines Australia regulations are very strict,” said one such agency.

Agencies who were thriving in pharma were more pragmatic. “It means you need greater understanding of the product, the clinical papers supporting its use and the code,” said one agency working with a range of pharma clients.



## What they said

Problems working with the MA Code drew a large number of comments from consultants working with Aussie pharma. “Hands-on pharma clients worry about pharmacovigilance and so like to be informed and fully aware of everything,” said one consultant, indicating how the need to comply overshadows all marketing activities.

“The MA code is interpreted very differently by different clients. This is not ideal,” said another.

“It governs who we engage with, how we engage and what story we can tell on their behalf,” responded a senior stakeholder communications advisor.

“The need to report adverse events has led to a fear of asking questions that might lead to a reportable event, meaning some research that is needed never gets done,” said a senior market research executive working with pharma in Australia. “Adverse event reporting can add significant

costs to a project, but it is hard to recoup these costs. Additionally, fear of breaching MA rules means that qualitative topic guides (for focus groups and in-depth interviews) get written as structured questionnaires, defeating the point of qualitative research which is to have a free flowing conversation where the researcher probes and clarifies and may go off topic if something interesting comes up in the conversation.”

Another pharma marketing consultant said the amount of knowledge required to work with pharma companies was a challenge. Understanding changes in the generic segment, biosimilar a-flagging and price disclosure were all important issues which impacted on jobs and needed to be understood by consultants working with pharma.

The move to digital was also not being embraced by Medicine Australia, reported one e-health digital marketing consultant.

“MA needs to stay on top of best practice in digital world - Australia is lagging [behind] other developed markets (UK, US, Canada),” the specialist said. “Passwords continue to provide a barrier to engagement when patients can look up sensitive information from other countries anyway, which is dangerous in itself.”

## Conclusion

Whether for pharmaceutical companies or for the agencies which provide external services to these companies, the *Pharma in Focus* Marketing Survey uncovered a range of issues common across both sides of marketing. Good communication is key to a good relationship between pharma companies and their agencies, while consultants working with the industry need to have a strong understanding of the many regulations and restrictions which the industry works under.

Procurement has clearly impacted marketing departments and their agencies in recent years with both departments and consultants concerned about the impact of this. Regardless, agencies must embrace the accountability required by this change and be able to clearly demonstrate return on investment if they are to thrive in the pharma environment.

The challenge for both pharma marketing departments and their agencies will continue to be to engage with healthcare providers, patient advocacy groups and the patients themselves within the tight constraints of the Australian regulatory environment. To do this when marketing and communication are increasingly occurring in the digital/online space - with all the challenges this brings - will continue to test both the prowess of pharma marketers and the strength of their relationship with their agencies.



## **About the Marketing in Australian Pharma 2015/16 survey**

This *Pharma in Focus* White Paper is based on the Marketing in Australian Pharmaceutical Companies 2015/16 survey distributed by *Pharma in Focus* in July 2015. The survey received 151 responses: 88 identified themselves as being employed by pharma companies and 53 by contractors servicing the Australian pharmaceutical industry.

Of those working for pharma companies, 47 per cent worked in marketing and 20 per cent in sales. The remaining respondents held positions predominantly in management, regulatory affairs, business development and corporate affairs and had strong relationships with the marketing function.

More than half of company respondents (54 per cent) were in a manager or senior manager position while 16 per cent were departmental or divisional heads. A further 12 per cent were associates.

Forty per cent of company-based respondents worked for a large pharmaceutical (annual turnover of more than \$400 million annually, most employing more than 400 staff locally); 22 per cent worked for a medium-sized pharma (earning from \$100-\$400 million annually) and the remaining 38 per cent worked for small pharmacos (earning less than \$100 million annually and employing less than 100 people).

Of those working in service agencies, 42 per cent had more than 10 pharma/healthcare clients with the remaining 58 per cent split evenly between agencies with six to 10 clients and two to five pharma clients. Most had revenue in excess of \$500,000 annually from pharma clients, all of which dealt with branded prescription products and many also having clients dealing in generics, OTC and complementary medicines.

## **About *Pharma in Focus* white papers**

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