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THE HEALTH AND TECH TRENDS THAT WILL SHAPE PHARMA MARKETING IN 2018

EXECUTIVE SUMMARY

2017 was a year of ongoing sociopolitical upheaval, and healthcare played a large role in those debates and events. But despite much unpredictability on the global stage, the year progressed productively in many ways for life sciences. From blockchains to voice assistants in technology, from the launch of OCREVUS™ for multiple sclerosis to that of cancer drug IMFINZI™ — new achievements have been made, new ways of working have been adopted, and new approaches to healthcare have been developed.

Political and economic questions will continue in 2018. But we see a public that is empowered, educated and passionate. They are conditioned to expect rapid, personalized service from brands, and are ready to take control. This expectation is pervasive, from healthcare professionals to patients and caregivers. We believe that technology is poised to aid in this, and that smart brands will harness digital to become a more valued and useful part of their audiences’ lives.

Here are the trends that we’re watching for 2018, and how we expect to see them affecting our work, the brands we support and the industry overall.

1. The Amazon-ification of health is here.
2. Trust and transparency are the new currency.
3. Technology is replacing much of pharma marketing — except empathy.
4. The trend of “Big Data” dissolves as we settle into a world of data ubiquity.
5. Pricing, politics and value-based care hold center stage.
6. Non-pharma players are coming to the pharma party ... largely as uninvited guests.
7. The very idea of “healthcare” shifts from illness to wellness.
8. Edge computing causes a behind-the-scenes sea change.

We’d love to hear your feedback. Do you agree? Would you choose different ones?

Also, check out our previous lists for 2017 and 2016 — and our 2018 predictions for Med Ad News.
#1 THE AMAZON-IFICATION OF HEALTH

“Hey, Alexa, refill my prescription.”

FEISTY CONSUMERS  FRICIONLESS EXPERIENCES  HYPER-PERSONALIZATION  DATA-DRIVEN
THE AMAZON-IFICATION OF HEALTH IS HERE

We’ve talked about empowered patients for years, and we’re finally beginning to see what that looks like: feisty, cynical, independent consumers who understand their health better than ever before, who want control over their experience, and who demand the same quality from healthcare that they receive from the rest of their shopping and technology interactions.

We want frictionless experiences that offer us more control and increased transparency. Healthcare delivery must become more effortless as the public grows accustomed to streaming entertainment, same-day delivery, and services that use sharing to make everything from bicycles to cars to apartments easier to get. Tech-enabled services like digital diagnostics continue to gain headlines. Others are taking longer; for instance, Medicare still is hesitant to reimburse for telehealth — but, as Rock Health noted, they will ultimately “come around.”

And the corporate side of healthcare is seeing a literal “Amazon-ification,” as tech and consumer brands like the online giant itself continue to make increasingly brave forays into healthcare. (Amazon has purchased wholesale pharmacy licenses in over a dozen states.) And healthcare brands continue to consolidate and become more focused on the patient journey. (This is exemplified by the recent CVS purchase of Aetna.)

Digital trends root themselves in demands for better customer experiences. As mobile video use continues to rise, short and silent videos are needed to attract the attention of scrollers. Shopping experiences become continually more frictionless, both online and in person. Social networks keep adding shopping functionalities. Mobile ads are getting smarter, based on where you are, what images you’re posting, and what you’re viewing. All of these evolutions go back to one essential point: the public has a device in its pocket and an itchy scrolling finger and demands ever more engaging and useful experiences.

Even medicine itself is becoming more personalized, tweaked and tuned to individuals’ genetic makeup. Services such as 23andMe lead us to believe that unending information is within our grasp, that the possibilities are endless for knowledge, choice and personalization.

DIGITAL TRENDS ROOT THEMSELVES IN DEMANDS FOR BETTER CUSTOMER EXPERIENCES
So What?

• To maintain and build relationships with their customers, pharma marketers must reach for the "Amazon bar" — successfully providing patients, caregivers, healthcare professionals and payers with convenient products, tools and information, while finding ever better ways to reach and understand them.

• For pharma marketers, "Amazon-ification" may look like on-demand tech solutions — like enterprise-wide consolidations that streamline the patient journey or local boutique offerings that give personal concierge service. But today, hyper-personalized experiences are the norm, both mediated and real-world — and pharma must measure up.

• The smartest marketers will embrace Amazon's example to ensure every decision is deliberately data-driven. When pharma someday learns to apply data like Amazon does, the customer experience will not only be vastly improved, but marketing itself will become smarter, more automated, and much more efficient.

Intouch Says:

"The power to make health choices is slowly and surely moving completely into the hands of the patient/caregiver/consumer. Effectiveness is only part of the story. Brands are beating products."

— Julie Levine, Vice President, Client Services

"What she gets from a few brands, she now expects from all brands. ... Let's face it, you can't just 'campaign' your way into people's lives anymore."

— Greg Schutta, Vice President, Client Services

Read More:

You Need More Video in Your Marketing
Avoid Deletion! Make Sure Users P.R.E.F.E.R. Your App
HCPs — They’re Just Like Us!
Customer Experience — What’s Old Is New Again
#2 TRUST AND TRANSPARENCY
Trust and Transparency Are the New Currency

Trust has been hard to come by in healthcare since the days of snake oil, and that’s logical — not much can be more personal or have a greater impact on us than our bodies and how they function. These days, our scrutiny and skepticism of healthcare often focuses on some of the digital facets of health.

Transparency — what is a company doing, how and why — has become a fundamental expectation for business. From drug pricing to personal data to trial outcomes, the public is increasingly savvy about asking tough questions and demanding answers. And with social media, the questions and the answers are easy for others to see.

Nor does the public simply rest after getting corporate answers: they want answers from each other as well. Nearly all of us look for crowdsourced reviews and ratings before purchasing goods and services (once again, there’s Amazon’s influence), so it should come as no surprise that patients and healthcare professionals look to similar ratings. A recent Sermo survey found that HCPs evaluated Sermo Drug Ratings, the network’s peer-review system for prescription drugs, as more credible than information from the manufacturers.

We — the public — are also increasingly concerned about the negative impact of the constant connection to our mobile devices, a truth that digital health professionals sometimes forget in our immersion in the field. As we reach smartphone saturation and keep increasing our time on our phones, studies are showing that devices can correlate with depression, imbalances of brain chemistry, and other negative consequences. Interest in mindfulness in general, and mindful use of technology in particular, is high.
So What?

- In this climate, it’s imperative that companies demonstrate their willingness to be transparent. A brand needs to be the go-to source for its own information. If it isn’t, someone online will step up to do the job, regardless of whether they’re qualified to do so.
- We can expect to see mobile ad spend continue to increase — but ad blocking will, too, as consumers continue to seek more control of their mobile experience. Craft hyper-relevant offers to break through the roadblocks.

Intouch Says:

"Transparency is one of those trends our clients wish wouldn't impact our sector. That's why we need to be brave about discussing it with them."

— Jani Westcott, Vice President, Strategic Planning

“Consumer-driven demand for transparency is bleeding into every brand and service we buy, even drugs. How are we adjusting our thinking to win in this environment? The old standby isn’t enough anymore, and boutique pharma companies will find victories in this space.”

— Julie Levine, Vice President, Client Services

Read More:

Transparency, the Key to Good Design

Staying Creative in the Face of “No”
#3 EMBRACING EMPATHY

ARTIFICIAL INTELLIGENCE

ALGORITHMS

AUTOMATION
CHATBOTS, FOR ALL THEIR PROMISE, STILL HAVEN’T LEARNED EMPATHY

TECHNOLOGY IS REPLACING MUCH OF PHARMA MARKETING — EXCEPT EMPATHY

These days, it may seem as though it’s out with the old and in with the computerized. In many (though limited) situations, artificial intelligence can replace human thought. We see it everywhere — from the way our car can parallel-park itself to the automated calls we receive. Sometimes it’s helpful; sometimes not. But it’s pervasive.

Artificial intelligence (AI), founded on data analysis and algorithms, may feel like it’s replacing human thought, creative idea generation — maybe even marketers themselves.

And on the sales side of the business, it’s possible that the field force will soon look very different. There are fewer and fewer reps, more and more chatbots — and as doctors increase the use of telemedicine, where would a rep sales call even occur?

Companies are adopting AI and automation in new ways every day, it’s true. But rather than fight this trend, the best marketers are figuring out what to embrace — and where their own value remains.

Automation can make us smarter and more effective. But what it can never replace is actual humanity. Chatbots, for all their promise, still haven’t learned empathy. We are people — not the results of algorithms or the sum of our psychographics. Technology can do amazing things, but it can’t succeed when it doesn’t have true emotion and understanding at its core.
So What?

- As Intouch SVP and Executive Creative Director Marty Canniff has said, “By focusing on the person and the idea rather than the tech ‘thing,’ we will continue to evolve and succeed.” We must keep a strategic mindset that asks “how?” second and “why?” first.
- Experts find that traditionally labeled “soft skills” like empathy will be among the abilities needed to succeed in the future. Are marketers hiring with not only tech abilities, but also empathy in mind?
- Apply AI and automation where it makes sense to solve a specific problem, not just for the sake of the shiny object.

Intouch Says:

“Marketers need to reach their audience with their content on a more personalized level to develop a connection. There is more opportunity than ever before due to technology, and we’re seeing a lot of pharma companies adopt new enterprise systems to allow custom content and personalization to take center stage.”

— Kelly McCoy, Vice President, Client Services

Read More:

- [10 Ways for Brand Managers to Be More Creative](#)
- [Your Baby Is Ugly: How Experience, Candor and Empathy Can Save Your Adobe Project](#)
- [Iconic Ads Can Teach Pharma to Be EPIC](#)
- [From Emojis to Gifs, How Adding Fun Visual Experiences Can Deliver Complex Messages and Develop Brand Relationships](#)
Remember in the early 2000s when everyone used the prefix “e-” all the time? E-business, e-commerce. Slowly, as it just became part of all business and commerce, the term went away. We’re seeing the same with “Big Data” today: 14 trillion gigabytes of data were created last year alone. Big Data is now just life. And we still talk about the “Internet of Things” — but in a world which will soon have 200 billion “smart objects,” they’ll soon just be “things” and “objects.”

Connection on a human level is vital for success. But knowing how to do that well is often the result of data analysis. Once, the challenges with data were collecting it, storing large volumes of it, and manipulating those large data sets for analysis. Those challenges become easier every day. What is becoming harder is ensuring the quality of the data we collect.

And the stakes are higher. It matters more than ever that data is accurate and its analysis is sound. AI is driving more and more business decisions; moreover, machine learning is making it possible for AI to increasingly make decisions about patient care. We have decision-making by consensus, but it’s automated: a consensus of data, made by algorithms.

Health wearables will continue to be an important part of this, with 156 million wearables forecast to exist in two years’ time. But they’re not the only
ones. Everything across the Internet of Things — from home devices like cameras, thermostats and refrigerators, to car sensors, to the functions of our ubiquitous smartphones — has the ability to help us better understand health.

Voice assistants are an especially interesting facet of this. On the one hand, data input is vital; they only work well when backed by enormous quantities of data and machine learning. On the flip side, extracting data-backed lessons can be challenging. Fully understanding how and why they’re used and how to improve is far more complex than running a Google Analytics report to see search terms.

And data sources can work in combination with traditional treatments. The first “digital drug,” ABILIFY®, has been approved for use with an ingestible tracker to monitor adherence.
So What?

- Data is now everywhere, so the questions become: Are we finding the right data? Are we analyzing it properly? And are we storing it safely? If you swallow a pill in the United States, you can be confident that its development, manufacturing, shipping, storage, dispensing and sale were conducted with a vast network of regulations ensuring your safety. That web of rules keeps that pill safe and effective for you. It will be exactly what it claims to be; it will do what it says it will; and it’s been safeguarded every step of the way, from initial research to the factory to the bottle in your hand. Health data must have the same level of airtight safety.

- Pharma marketers must be taking advantage of data knowledge — both in how they make the strategic decisions that drive business and in the tactics that reach customers. And to use data properly, the information must be stored safely and analyzed accurately.

- Surveys find the public expressing trepidation about AI. As noted above, transparency will be key in managing any fears that arise — from patients and caregivers, from healthcare professionals, and also from employees.

Intouch Says:

"Wearable tech will continue to play a growing role in healthcare and present opportunities for pharma companies to increase adherence and bring value to patients when managing their health conditions."

— Kelly McCoy, Vice President, Client Services

"Digital therapeutics can offer economic advantages to the healthcare system. They offer precision, control and the promise of greater knowledge. And they’re proving their worth every day in the real world."

— Faruk Capan, CEO

Read More:

- Machine Learning 101: What Is It and What’s It Mean for Pharma?
- WTF Is Blockchain and Why Should You Care?
- Where’s the Voice in Your Analytics?
- The AI Revolution Is Underway
- Marketing Automation: Good Medicine for Pharma and Customers
#5 PRICING, POLITICS AND VALUE-BASED CARE

POLITICAL SPOTLIGHT  PRICING CONTROVERSY  MARKET ACCESS
PRICING, POLITICS AND VALUE-BASED CARE HOLD CENTER STAGE

While healthcare has remained in the political spotlight in the United States — and around the world — and will probably continue to do so, the pharmaceutical and life sciences industry has not faced many of the legislative repercussions that had been feared for 2017.

However, as the standard investing disclaimer says, “Past performance is no guarantee of future results.” We know politics are unpredictable, particularly current politics. It would be unwise to assume that a quieter-than-expected 2017 means that legislation is not a major concern for pharma in 2018. Controversy about drug pricing isn’t going anywhere, and neither is the attendant potential hit to the industry’s reputation.

Outside of Capitol Hill, managed care continues to gain importance, as the slow but steady evolution continues from fee-for-service to value-based care. In a recent article, we looked at the evolution of American healthcare, as capitalist expansion necessitated the creation of employer-provided health insurance — leading, centuries later, to our current managed care paradigm. Today, however, we see fragmentation disappearing, as corporations merge and collaborate to find cost efficiencies.
So What?

- Novartis' leukemia drug, KYMRIAH™, took a novel approach in 2017 — “try it before you buy it.” If it works for children covered by Medicaid, Medicaid pays; if it is ineffective, Novartis refunds Medicaid. Will we see more companies introducing an "innovative pricing approach" for brands in 2018?

Intouch Says:

“Healthcare success will increasingly hinge upon market access. You need to be working with a market access team, and one that's rooted in mobile technologies. Traditional channels are still vital. But you need a team that can understand how they all fit together, one that can help you develop the strategies to win in this new world, regardless of who merges with who or which new player enters the field.”

— Peter Weissberg, Vice President, Market Access

Read More:

Brave New World, Brave New Metrics: Why Engagement Analytics Matter in Value-Based Care
How Railroads Changed Healthcare — And Why It’s Happening Again
#6 BIG TECH: CRASHING THE PHARMA PARTY

BIG TECH LOOKS TO BIG PHARMA

SEAMLESS EXPERIENCES

AMAZON RX
NON-PHARMA PLAYERS ARE COMING TO THE PHARMA PARTY ... LARGELY AS UNINVITED GUESTS

Headlines in 2017 were filled with stories of tech companies wading into healthcare and life sciences — from the giants like Amazon, Apple, Facebook, Google, IBM and Microsoft, to tiny start-ups.

We are beginning to see these forays evolve and grow. Rather than a new sensor for a wearable or another fairly limited endeavor, we’re now looking at much larger initiatives: for example, Amazon buying wholesale pharmacy licenses in a dozen states or Google’s Verily starting a four-year, 10,000-patient study. Even older tech companies are getting into the game. Nokia acquired smart-device company Withings for its digital health unit. And the amount of data the collective tech giants now have access to is immeasurable.

At the same time, as we become an ever-more-digital world, the power that tech behemoths wield over our everyday communications and interactions becomes more relevant and impactful on life sciences marketing.

Consumers are becoming accustomed to seamless digital experiences. From our homes to our cars, our devices to our workplaces, we expect the systems with which we interact to know our history and our preferences, to offer exactly the option we need, and to let us complete transactions with a few taps. The healthcare system should be no different. In fact, 59% of U.S. online shoppers expect their healthcare customer service to be as good as Amazon’s.

So it makes sense, with the “Amazon-ification” of healthcare underway, that Amazon and its ilk would step in.
So What?

- Pharma needs to become even more open to partnership with big tech. The potential has always been clear in the match: scientific knowledge and regulatory familiarity on the one side, technological knowhow and innovative chutzpah on the other. We’re hesitant to assert that this will finally come to fruition in a big way in 2018 ... but wouldn’t it be awesome?

Intouch Says:

“There are a million trends we aren’t acting on because we’re waiting for someone else to test the uncharted waters. When it comes to the adoption of innovative tech/channels, consumers are leaving pharma in the dust.”

— Matt Caffrey, Group Account Director

Read More:

Apple's Latest: Huge Potential for Healthcare
Apple Takes AR, VR and Machine Learning to New Heights
How Targeted Is Facebook Targeting?
Google Hates Your Interstitials
Health Outcomes: Building the Next Button

OVER IT

Trends you wish no one would ever mention again:

“QR codes. Going viral. Big Data.”
— Julie Levine, Vice President, Client Services

“Any trend that isn’t grounded in a solid strategic foundation.”
— Greg Schutta, Vice President, Client Services

“Prescription drug savings cards.”
— Jim Ruiz, Senior Director, Relationship Marketing
#7 FROM ILLNESS TO WELLNESS
THE VERY IDEA OF “HEALTHCARE” Shifts FROM ILLNESS TO WELLNESS

As consumers grow more empowered, aware, cost-conscious and impatient — as well as better educated about health — and as margins in the healthcare industry become ever tighter, wellness is becoming bigger business. Fields related to health and wellness — such as the fitness industry and the health-food industry — are themselves incredibly healthy, growing rapidly.

There is an increasing overlap between fitness and medicine as consumers seek to take action to improve their wellness, using devices and tools to track their diets, exercise, symptoms and experiences. And where consumers go, so goes business.

As digital health industry analysts at Rock Health noted, “Though uncertainty around national healthcare reform has dominated headlines, political volatility has not abated investor appetite for digital health.” In the first half of 2017, they “saw more, larger deals than ever before.” While the biggest venture in that time was Outcome Health’s $500 million round, it was closely followed by Peloton’s $325 million round. Peloton in this case is not the pharmaceutical company of the same name, but the manufacturer of connected fitness equipment, which sells exercise bicycles that stream cycling classes to users live and on demand. To date, Peloton has no deals with payers or pharma — but they partner with Fitbit and are evolving their business model fast.

Prevention is more cost-effective than remediation, in almost all cases, and health is no different. In addition to being an innate goal, wellness makes financial sense for society, too.
So What?

- Which companies will take advantage of this trend and find innovative, effective ways to partner in 2017?
- Health insurance premiums continue to rise, and the consumer concern about this is well documented. Some mitigation already exists: half of large companies offer health incentives to employees. With consumers becoming ever more concerned about healthcare costs, will we see more brands — possibly including pharma brands — promoting their efficacy in terms of how much money it can save?
- How can “beyond the pill” services combine wellness and behavior change with traditional treatments to make them even stronger in combination?

Intouch Says:

“Consumers — and the healthcare industry — are realizing we must get out in front of treating diseases and move towards preventing them through lifestyle choices. It can’t be just about treating illness anymore. When you think in terms of adjunct services that focus on lifestyle and wellness, everyone wins: consumers, payers, professionals ... and smart brands, too.”

— Sarah Morgan, Content Strategist

Read More:

Wearables 2.0: Beyond the Watch

Take Two Apps and Call Me in the Morning
#8 EDGE COMPUTING: LOCALIZING DATA ANALYSIS

COMPUTING CLOSER TO THE ORIGIN

FASTER PROCESSING
EDGE COMPUTING CAUSES A BEHIND-THE-SCENES SEA CHANGE

This may be a new term for you, but edge computing refers to moving the computing process closer to the origin of the data. Thanks to increases in processing power in tiny devices, data can often now be processed not in the cloud, but inside an IoT device itself. The minute gains in speed that can be made by this relocation can add up to make a big difference.

Think about driving your car and the way you sigh when your GPS recalculates. That lag is a little annoying, but it could be deadly if it were processing some of the computerized aspects of driving like your blind-spot camera or your anti-lock brakes. It’s an imperfect metaphor, but the point is, when functions need to happen as soon as possible, it’s often best for them to happen on board.

Medical devices offer another great example of how edge computing will change our world. Consider an implanted device that can monitor blood chemistry and self-administer treatment in real time. This could change life for a patient with diabetes, for instance. You can see why devices like this can’t rely on spotty wireless connectivity and the cloud to evaluate data and make lifesaving decisions.

But wait: Wasn’t everyone just talking about how great the cloud was last year? Yes! And the accessibility of storage on that scale is as important as—or more important than—it ever was.

But, as in many other things, we see a slow but steady pendulum swing between distributed and centralized. As processing power increases and storage devices shrink, we’re more able to reap the benefits of local processing—not instead of, but in addition to, cloud computing.

From TechCrunch to Forbes to GE, and across healthcare, more analysts and pundits are talking about how edge computing will change how we work. We are moving toward a world where everything is interconnected, and the systems that support the IoT and edge computing will need to be secure and scalable. One solution, IOTA’s “tangle,” aims to be the “the backbone of IoT.” The IOTA tangle works in a similar fashion to blockchain but is decentralized and more scalable, making it possible for devices to collect, process and analyze data and share it securely with other devices nearby, all with zero transaction fees.

THE MINUTE GAINS IN SPEED THAT CAN BE MADE BY LOCALIZING DATA CAN ADD UP TO MAKE A BIG DIFFERENCE
So What?

- Will “edge computing” be in the title of anything that comes across your desk in 2018? Perhaps not directly. But it’s important to be aware of this decentralization. What was once impossible, due to time lags and device size, is increasingly possible. Whether that’s what a medical device can accomplish, what a live conversation with an HCP is capable of demonstrating, or what a wearable can do for a patient in a trial or out in the world, edge computing will make you rethink your assumptions.

Intouch Says:

“To me, one of the most intriguing elements of edge computing will be how it will leverage the secure sharing of Internet of Things data between devices.”

— Jacob Shepherd, Director, Product Development

Read More:

What Is Edge Computing — GE Digital
WTF Is Blockchain and Why Should You Care?
CONCLUSION

Staying on top of industry trends isn't about being fashionable — it's about ensuring that your brand can succeed in an ever more competitive world.

The year 2018 will — like every other — bring us new and unexpected challenges. But we can prepare to meet them head on.

Empowered customers (whether consumers or healthcare professionals) expect control, visibility into the systems, and a personalized approach enabled by deep understanding. Perhaps most of all, though, they hope for empathy — a sense that there's a real person behind a brand communication, someone with a sense of humor and a real understanding of their needs and concerns. As new players enter the life sciences field and pricing pressures build, it's more important than ever for pharma marketers to "get it" — to be able to provide HCPs, patients, caregivers and payers with information, resources and tools that they find useful and engaging.

We hope you've enjoyed our thoughts about what will matter most in 2018, and we'd love to hear your point of view.

Join the conversation: email us at getintouch@intouchsol.com, message us on social media, or contact your Intouch team to talk more about how these trends will impact your brands in the coming months and beyond.

TABLE STAKES

These aren't trends anymore. If these aren't part of your everyday business, you're behind!

- Mobile first
- Multichannel mindset
- Data (which should not only be collected, but cleaned and analyzed)
- Programmatic advertising
THANK YOU TO THESE CONTRIBUTORS

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