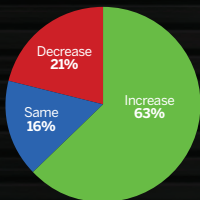


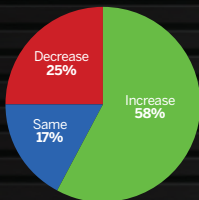
Fig. 2: Shift in Total Marketing Budget, 2013

% of respondents reporting shift

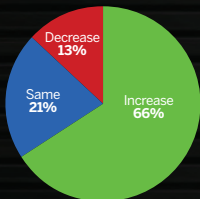
(n =119)



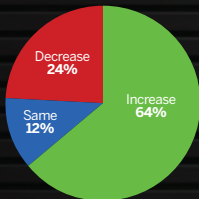
All



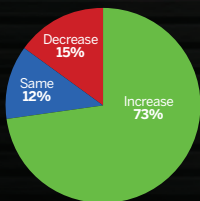
Pharma



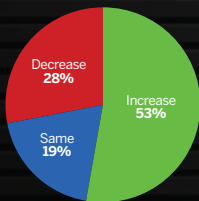
Biotech



Devices



Small Companies
(<\$500M)



Med/Large Companies
(\$500M+)