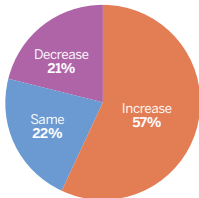


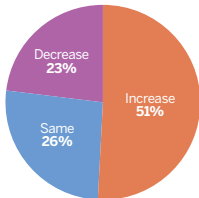
Fig. 2: Shift in Total Marketing Budget, 2014

% of respondents reporting shift

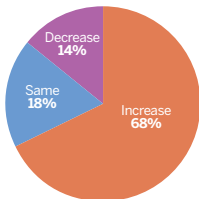
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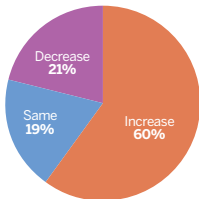
All



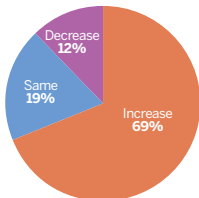
Pharma



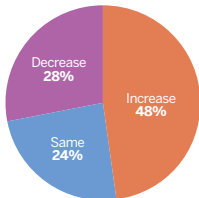
Biotech



Devices



Small Companies
(<\$500M)



Med/Large Companies
(\$500M+)