



INTRODUCTION TO FLASHFOCUSsm

“Over a decade of impacting marketing decisions through high level analyses by treating demographic statistics as *neighbors instead of numbers* “

FLASHFOCUS PHILOSOPHY AND APPROACH:

NEIGHBORS NOT NUMBERS

- Too often, the statistical part of demographic analyses hides the obvious fact that we're dealing with people however these people might otherwise be described: consumers, users, patients, travelers, drivers etc. etc. etc.
 - Groups of people share values and beliefs, their actions driven by common attitudes. They can live next door or across town or across the country.
- Understanding 'demographics' from the perspective that we're dealing with *real people* as opposed to statistics is the **FLASHFOCUS** philosophyand we've been doing just that for over a decade.

AN ENORMOUS SOURCE OF DATA

- Two **FLASHFOCUS** ‘buckets’ of data:
 - Public Domain data – the huge data bases of:
 - US Census, Centers For Disease Control, State health departments etc.
 - Proprietary and syndicated
 - As provided by agency partners and clients
 - Sales, subsets of various demographics as provided by syndicated sources like MRI, AC Nielsen, IMS or client’s own data bases
- This range of demographic data is provided in various geographic configurations: from 33,000 zip codes to counties to MSA’s to custom configurations.

THE **FLASHFOCUS** IMPACT ON MARKETING

- The outcome of **FLASHFOCUS** demographic analyses comes in two basic forms, generally presented together:
 - Charts with values, proportions and ranges
 - Maps for visualization of these values
- Sample Chart 1 is a value chart indicating a client X's sales by market in proportion to their desired demographic population target, women 18-34. There would be 210 markets evaluated and noted in this chart.
- Sample Chart 2 is a value chart indicating the proportion of people with HIV as a percentage of the general population.



CHART SAMPLES

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SAMPLE FLASHFOCUS CHART 1 –

CLIENT X SALES TO DEMOGRAPHIC TARGET WOMEN 18-34

Client X Sales to Demographic Ratio

| Markets | Brand Development Index* |
|--------------|--------------------------|
| New York | 87 |
| LA | 151 |
| San Fran | 178 |
| Chicago | 101 |
| Milwaukee | 98 |
| Cleveland | 87 |
| Miami | 121 |
| Orlando | 145 |
| Houston | 124 |
| Dallas | 128 |
| Denver | 67 |
| Minneapolis | 83 |
| Seattle | 100 |
| Boston | 78 |
| Philadelphia | 90 |
| Washington | 85 |
| Baltimore | 83 |
| etc | |
| etc | |
| etc | |

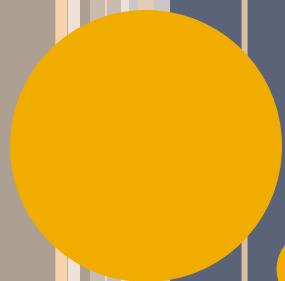
Brand Development Index is derived mathematically by calculating the difference between a population percentage versus a client's sales

| | % Women 18-34 | %Client Sales | Brand Development Index - BDI) |
|----------|---------------|---------------|--------------------------------|
| New York | 6.70% | 5.80% | 86.56716 |

In the above, you would say that New York is Under performing the US with a BDI of 87

SAMPLE **FLASHFOCUS** CHART 2: DEMOGRAPHIC DENSITIES OF SPECIFIC DISEASE POPULATION TO GENERAL POPULATION

| Market | Ind Disease Pop to Gen'l Pop |
|--|------------------------------|
| Miami-Fort Lauderdale-Pompano Beach | 246 |
| New Orleans-Metairie-Kenner | 193 |
| Baltimore-Towson | 192 |
| New York-Northern New Jersey-Long Island | 188 |
| Jackson | 161 |
| Baton Rouge | 160 |
| Washington-Arlington-Alexandria | 152 |
| Columbia | 148 |
| San Francisco-Oakland-Fremont | 145 |
| San Juan-Caguas-Guaynabo | 141 |
| Atlanta-Sandy Springs-Marietta | 125 |
| Charleston-North Charleston | 122 |
| Jacksonville | 121 |
| Orlando-Kissimmee | 119 |
| Philadelphia-Camden-Wilmington | 116 |
| Augusta-Richmond County | 110 |
| Memphis | 110 |
| New Haven-Milford | 110 |
| Little Rock-North Little Rock-Conway | 109 |
| Virginia Beach-Norfolk-Newport News | 109 |
| Tampa-St. Petersburg-Clearwater | 102 |
| Houston-Sugar Land-Baytown | 101 |

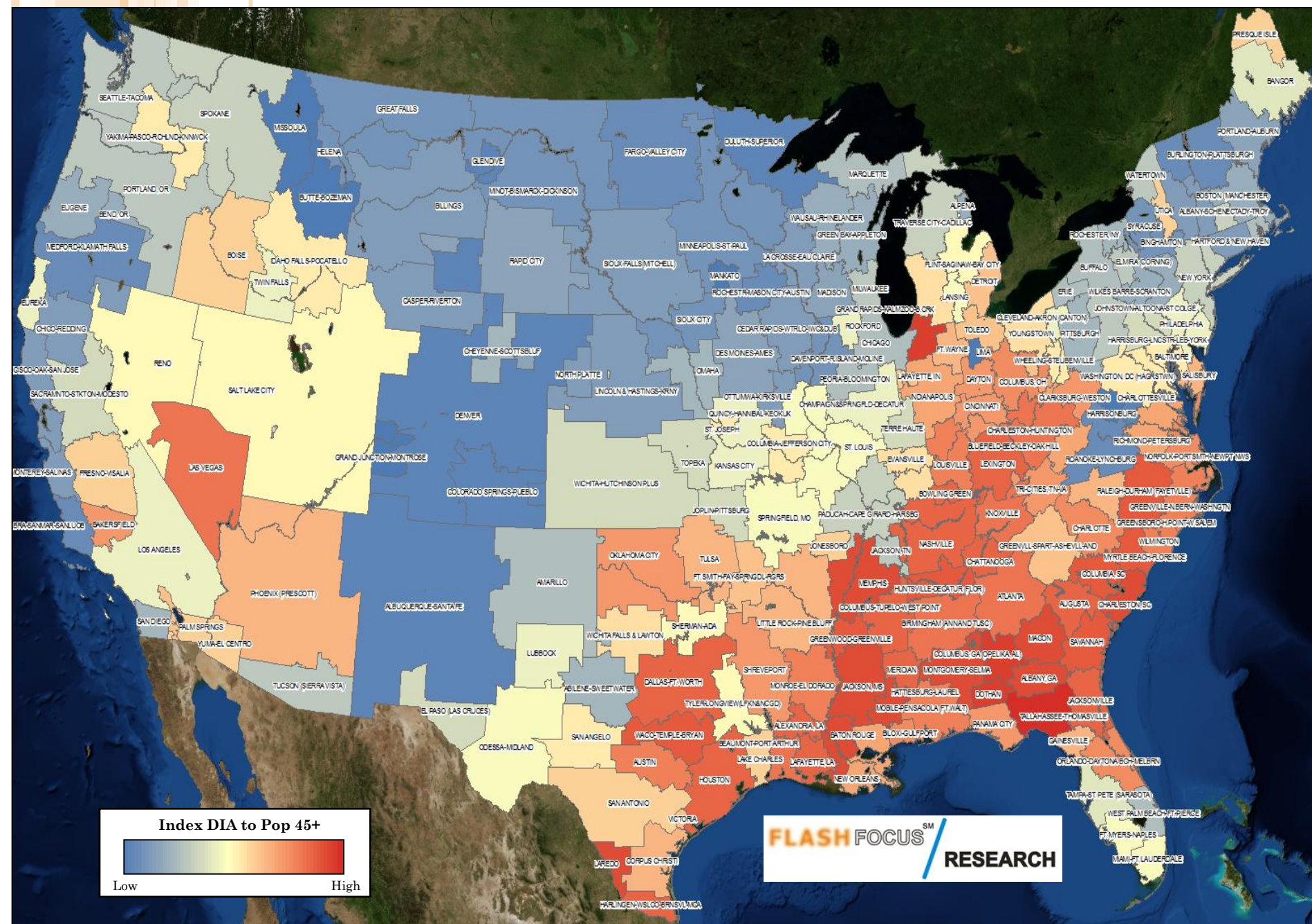


MAP SAMPLES

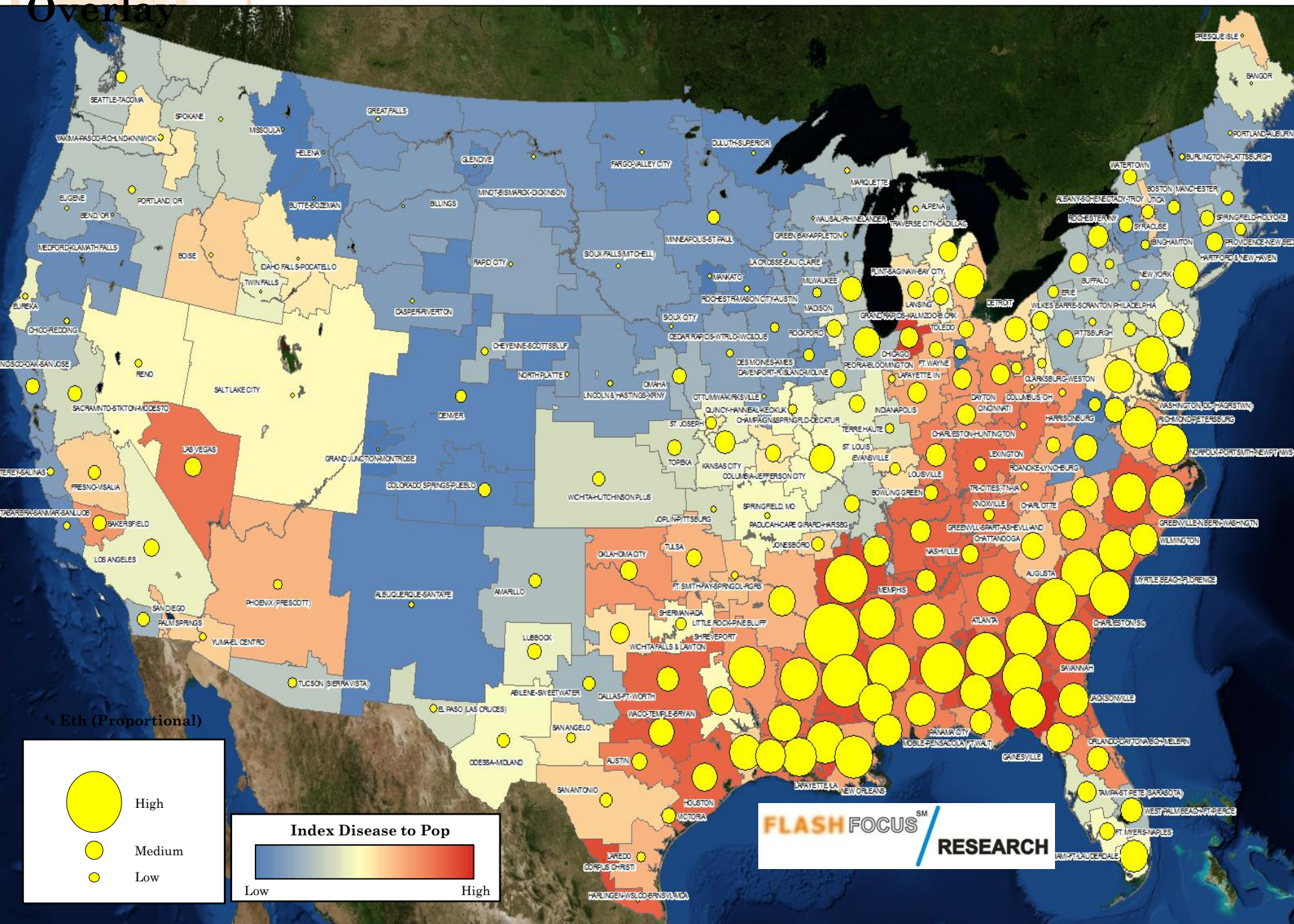
SAMPLE FLASHFOCUS MAPS

- While all are supported by chart values, maps are usually the easiest way to present large volumes of data. Consider:
 - Sample **FLASHFOCUS** Map 1 indicates a basic visualization of data, People with Disease X as a percentage of the Adult 45yr+ population;
 - Sample **FLASHFOCUS** Map 2 uses these same values for Disease sufferers but overlays it with ethnic population densities.
 - Together, these maps readily show patterns of the Disease X population and importantly, the correlation to an ethnic population. In this case, this simple overlay begins the story of ‘numbers as neighbors’.
 - Sample **FLASHFOCUS** Map 3 is a deeper dive into a single MSA by zip code analysis providing insights into multiple ethnicities

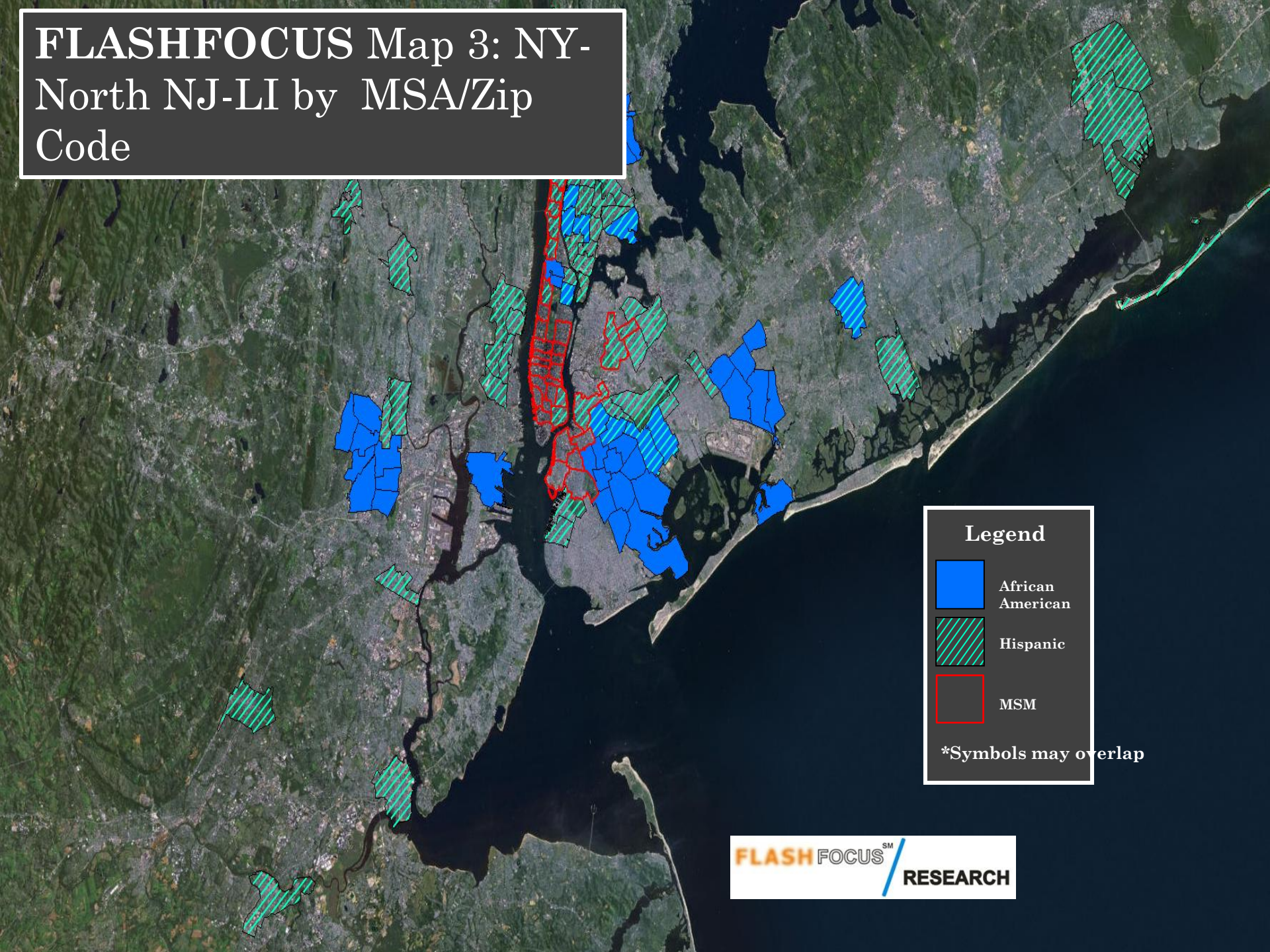
FLASHFOCUS Map 1: Index Disease to Gen'l Pop



FLASHFOCUS Map 2: Index Disease to Gen'l Pop, with Ethnic Overlay



FLASHFOCUS Map 3: NY-North NJ-LI by MSA/Zip Code



Legend



African
American



Hispanic



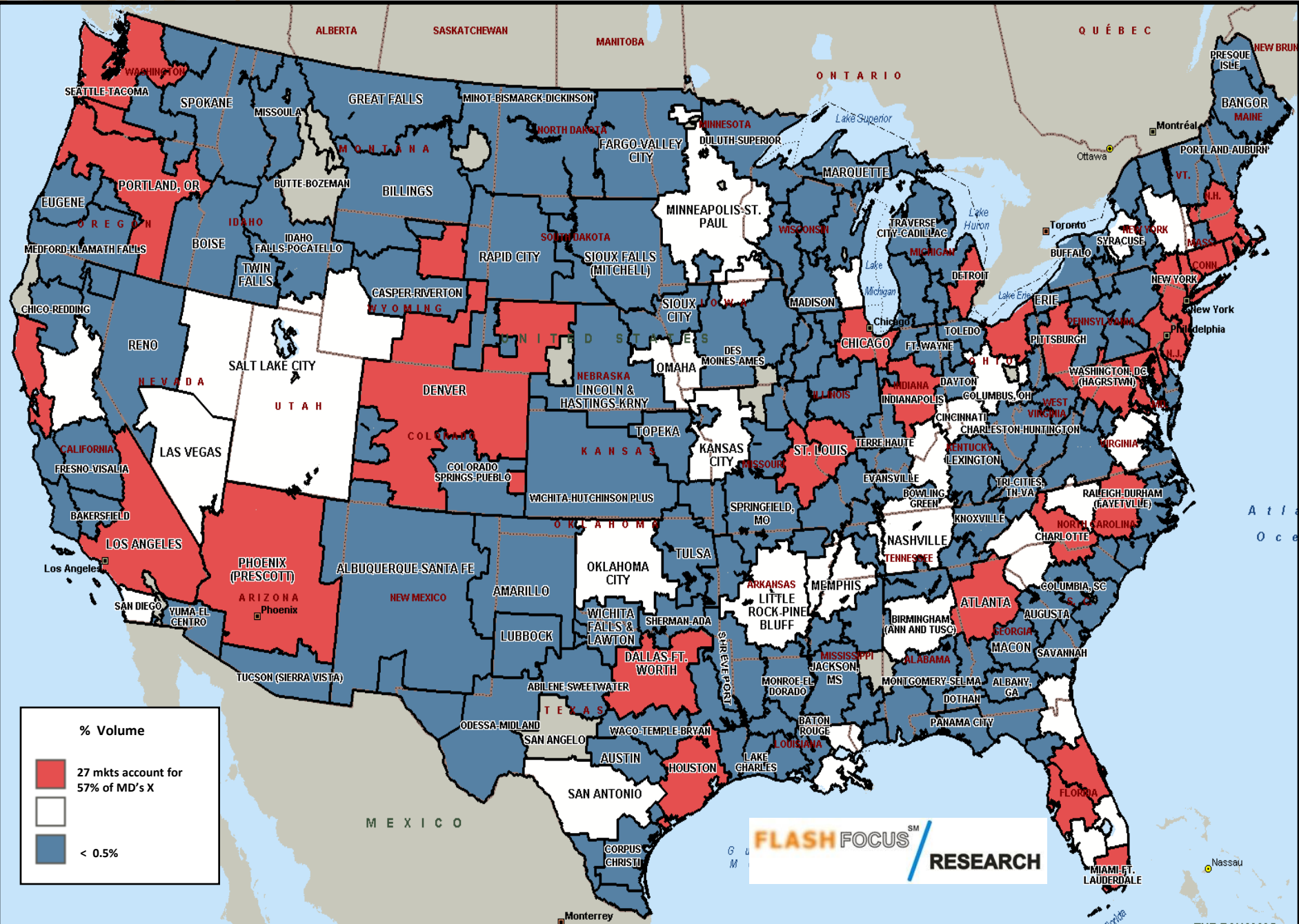
MSM

*Symbols may overlap

FLASHFOCUS DEMOGRAPHIC DATA: ALMOST INFINITE IN NUMBER

- The term ‘demographics’ tends to conjure up simple categories like ‘age’ or ‘income’ or ‘education levels’ but in fact, the broadest use of the term provides an almost limitless degree of data.
 - In **FLASHFOCUS** Map 4, numbers of physicians in a highly select specialty were evaluated and mapped.
 - Subsequent analyses provided overlays of patient population and other kinds of patient demographic characteristics
 - This demonstrates ‘numbers as neighbors’ concept...and their healthcare providers.

FLASHFOCUS Map 4: Specialist MD % Prevalence by Market



FLASHFOCUS MARKETING IMPACT

- The term ‘marketing’ covers very wide areas of expertise, touching on sales initiatives, creative responses, deployment of media funds, grass roots efforts, specific trade activities etc.
- **FLASHFOCUS** analyses touch on almost all aspects of marketing, most directly on marketing communications strategies.
- Insights can be strategic (like the African American correlation to Disease X) or nuanced (Client X’s sales ratios vis a vis women 18-34) but in each and every case, it is not merely the numbers behind the analyses, but rather respecting those ‘numbers’ as ‘neighbors’.