

PMR<sup>2</sup> 13th Annual Predictions Issue**Bob Lederer — PMR<sup>2</sup> Editor and Publisher**

This year-ending **PMR<sup>2</sup>** has great contributors we expect and an array of pharmaceutical, biotech and healthcare MR predictions and comments.

Thank you, all of you who contributed.

These participants clearly see many potential tasks facing the industry. At the same time, MR departments inside biopharma and healthcare operations have access to myriad research tools and techniques needed to succeed.

*This year's predictions are presented in the order they were received.*

**Brian Fine,  
Chairman — QOR**

The challenges in research providing representative samples are heightened when dealing with medical practitioners, health workers and the chronically ill.

The busier, more successful practitioners – a critical component of any representative industry group – are far less accessible and willing to participate in research.

Conclusions drawn on such samples need to be treated with caution, unless calibrated by known differences between “busy, successful” practitioners and more willing available ones.

Looking ahead, the research industry will be challenged to manage and weight samples (using techniques such as propensity weighting) and creating panels that are “engaged in the research program” and either randomly selected or carefully recruited to quotas that are extensive and relate not only to discipline but, as well, to frequency of activities and other relevant parameters.

A carefully designed panel, with appropriate and significant incentives is likely to be necessary, and management and replenishment of any churn will be critical to a continued credibility as being “representative”.

Other predictions include greater use of Choice Models and Decision Support Systems (DSS) to assess trade-offs, preferences, choices and impacts on bottom lines of alternative options. This relates to communications, branding, strategic positioning, pricing and products and any other commercial decisions.

While use of more passive and Big Data will permeate this sub-industry group in the same way it is increasingly mixing with Market Research activity

in general, we will see more data “fusion” between databases and primary research to provide insights and the “why” of data outputs.

Triangulation between doctors, pharmacies, receptionists and patients will increasingly add layers of insight to the research process.

There is much opportunity to expand the tools and service offerings we provide to Pharma, despite a decreasing availability of respondent pool!

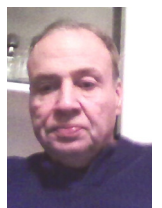
**Jim Jacobs,  
President — Focus Insite**

The current Trump administration is going to be a big win for bio-pharma research. Less regulation in the marketplace, along with a record stock market, will result in lots more studies in 2018. Market share will be shifted towards the bio techs and medical devices, away from the medical insurance side in my opinion.

With tax cuts and the market at an all-time high, I believe that some lesser regulations will result in a higher emphasis on medical device manufacturing, advancement and market research studies. 2018 will be a record year in terms of metrics of year-over-year growth- a bigger boon than any we have seen in the past decade.

**Terry Nugent,  
Director — Medical Marketing  
Service, Inc.**

2018 will pose an historic opportunity for market researchers to fill the gaping hole in data science, which is hurt by a paucity

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of data scientists. Market researchers are the perfect people to take charge of this role and need only to position and credential themselves accordingly.

Market research will increasingly change from an attitudinal art to a behavioral science, utilizing the miraculous and wonderful 21st century tech stack to measure behavior in response to various stimuli in real time and roll out the most successful test hypotheses in real time.

Expect research on the power of emotional appeals even in B2B to increase, based on the political zeitgeist and the clickbaiting media environment. Behavioral psychographics employed by digital marketers (first and foremost Facebook) are the template.

Market research will be carried along by the general marketing tide to become more and more identity-based. No longer will a sample be generalized to a population. Individual valences based on a digitally identified person will be developed and leveraged.

Marketers and researchers who master social and mobile will survive; those who consciously limit themselves to archaic communications systems such as landlines won't.



**Peter Simpson,**  
Principal — Segmedica and Xperient

If you walk through the exhibits at a Pharma research conference you will see lots of data-gathering technology offerings, but relatively few data analysis innovations. And by innovations I do not mean software to make analysis quicker and easier, but new approaches to analysis – both qual and quant. In 2018, we will see more innovation concentrated on how to think through results, parse apart language, relate responses to personality drivers and generally reach deeper.

To do this, we need to pull from psychology, anthropology, sociology, neuroscience and linguistics. For example, neuroscience goes way beyond measuring electrical discharges in the brain (dubious as currently practiced), but gives understanding pertaining to the geography of the brain and how mental operations link to psychology and decision making. For example, did you know that neither neuroscience nor psychology have a concept of the “subconscious”? How about that emotions generally do not do much to drive decisions? Or, that attitudes are the output of the decision making process, not an input?

Here's to the hope that we all make 2018 a pivotal year by driving Pharma research to acknowledge and starts to dive deeper.



**Harriet Kozak,**  
U.S. President — The Research Partnership

“Patient centricity” is not a new concept but it's certainly gained momentum in 2017. Who hasn't heard or muttered that catchy phrase in the course of their working day this year? It's certainly going to continue to be a focus for 2018 and beyond; our industry bodies, PMRG and PBIRG, are devoting their whole annual conference to the theme of the patient voice.

Despite those within pharma who may cling to the old product-led model, there are continued signs that the pharma industry needs to be thinking more urgently about how best to adapt in order to become more patient-centric, especially in light of growing competition from non-traditional sources.

For example, there's much talk (and perhaps sharp intakes of breath) about the news that Amazon has acquired wholesale pharmacy licenses in 12 U.S. states – effectively giving it the right to sell prescription drugs. How they will do this is still up for debate, but with media reports that Amazon, Google and other big tech brands (as well as small start-ups) have been doing lots behind the scenes to disrupt the healthcare market ‘experience’ for patients, it's clear that big changes are afoot, both from within the industry and outside.

Fortunately, as market researchers we are ideally placed to help pharma understand patients better, even as we ourselves face competition from non-traditional competitors who may claim access to the patient voice through Big Data and the like. By placing the highest priority on partnering closely with our clients, we continue to design new and creative ways for our clients to understand and address the real-world patient experience.

**Jason Martuscello,**  
President — Prospecion Sciences



**New Patient Journey:** As patients are more involved than ever and as patient ownership in their healthcare decisions rises, research will focus on helping clients navigate the new patient journey.

**Strategic Advisor:** The industry will shift its operating model from consultants providing data to strategic advisors providing deep expertise and data to help organizational leaders make the best choices possible about the future.

**Service Synergies:** The industry will focus on creating synergies of to bring smarter, faster, and cheaper solutions end-to-end solutions for improved MR experiences for clients.

**Justin Edge,**  
Global Head of Health — GfK



I've been doing these predictions for 10 years. The technology has changed, our clients' innovations have changed, and the competitive landscape has changed, but the underlying need to adjust to change remains a constant in our profession. The past few months alone have seen predatory moves by Amazon in healthcare, CVS' merger with Aetna, the approval of Abilify MYCITE® (world's first digital pill), another approval for Novartis' Kymriah (novel gene therapy), threats to Obamacare, the Brexit-induced relocation of EMA from London to Amsterdam, and biosimilar momentum. (The biggest surprise is the long-overdue pending merger of PMRG and PBIRG!)

So what does the near future hold in store for us?

- Traditional MR is dead, long live non-traditional MR. We are awash with new technology that has the potential to fuel

a renaissance in our discipline. Voice and VR/AR will displace fairly recent innovations like mobile apps and online approaches.

- Forget #1 for a minute. The reports of MR's death have been greatly exaggerated. Carefully designed, strategic research still informs big commercial bets at a time when executives are hungry for compelling data to shape strategies. New therapies still need forecasts, positioning strategies and launch readiness plans. And there are a lot of new therapies being approved.
- The name may change but the song remains the same – call it analytics, Big Data, insights, consulting or research. We are all family.

- Some MR traditions still have value; measurement accuracy, data integrity and scientific methods are more relevant than ever in a world of false news. If you don't believe me, just wait for the first casualties of GDPR.

- New commercial models demand fresh research thinking – digital therapies, new DTC service models, blurring lines between consumer health and Rx all require a different lens when decoding consumers and markets of the future.

GfK is fundamentally retooling our structures, strategies, talent and technology to take advantage of these trends. **PMR<sup>2</sup>**

*Thank you to all of our PMR<sup>2</sup> Predictions Contributors. Here's to a productive 2018!*

## PMR<sup>2</sup> News Notes



**SCORR Marketing** (Kearney, NE) released the "**Collaborative R&D Survey Report**," which details the extent to which **collaboration in the life sciences industry** occurs, and provides insight into **influential factors** of such collaborations, and the business strategies, benefits and risks associated with collaborative R&D.

**SCORR Marketing** also released a report, "**Patient-Centricity in Clinical Trials**", a in conjunction with **KNect365**. It explains the contradiction that while medical professionals say they take "**patient-centricity**" seriously, nearly one-third of respondents said **their companies do not solicit input from their patients**.



In a piece at **Forbes** by contributor **Bernard Marr**, the manner in which **A.I. and machine learning is exploited in healthcare** was examined in detail. The goals of these implementations of these technologies has been to **minimize**

**misdiagnoses, false positives** and insights created only in sheltered, **silos** (and, therefore, not leverageable).

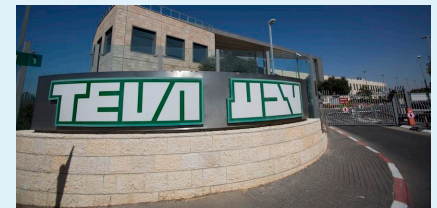
Australian science writer **Angela Lush's** piece for *Cosmos Magazine* explained **how scientists in her country are using phone and social media information** to build detailed **pictures of infectious diseases**. It's possible due to **smartphone** hardware (like accelerometers), which have the ability to **measure all kinds of body movements**.

**Lightspeed Health** (Warren, NJ) was recently awarded **International Organization for Standardization (ISO) Certifications 20252** – designated for market, opinion and social research and suitable for both qualitative and quantitative project management – and **26362** – designated for **access panels in market, opinion and social research**.



**Eko Devices** (Berkeley, CA) is rolling out a new **digital stethoscope for home use** called the **Duo**, which aims to **streamline the ways in which heart patients can be monitored**. It will become available via prescription in the fall.

**Ipsos Healthcare** (London, UK) extended its **Global Nonalcoholic Steatohepatitis (NASH) Therapy Monitor** into the Japanese market, broadening the reach of Ipsos' Virology & Liver Diseases Real World Evidence portfolio beyond the EU and U.S.



Israeli generic drug company **Teva Pharmaceuticals** (Petah Tikva) saw its **share price plummet by 24%** in August, **eliminating an estimated \$7.5 billion USD** from its total value. Internally, the price drop was attributed to stiffening competition abroad; externally, analysts saw management failures going back to at least 2007.

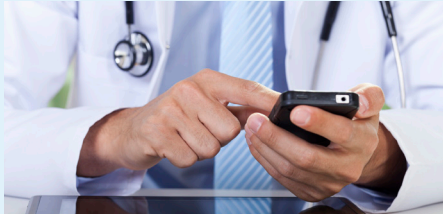
Life science and healthcare market intelligence firm **InCrowd** (Boston, MA) recently passed a milestone. It **delivered 1.5 million answers from its healthcare professionals panel**. Proof of its progress and acceptance: it took InCrowd six years to reach 1 million answers and the latest 500,000 were delivered in only 17 months.

According to a report from **MarketResearchReports.biz** (Albany, NY), the **healthcare informatics and patient monitoring market** is expected to rise a



healthy **16.3% from 2017 – 2025.**

A **Cutting Edge Information** (Research Triangle Park, NC) study revealed that **80% of surveyed life science marketing teams consider healthcare physicians their primary target.** Sixty-three percent of those teams used mobile health apps for physician detailing and physician education.



**Cutting Edge Information** also revealed that the **most popular pharma industry social media platforms** (in order) are **Facebook (73%), YouTube (64%), LinkedIn (55%), and Twitter (45%).**

Pharma researcher **Decision Resources Group** (Burlington, MA) introduced a methodology, **Integrated Delivery Networks**, for analyzing segmenting groups of healthcare providers.



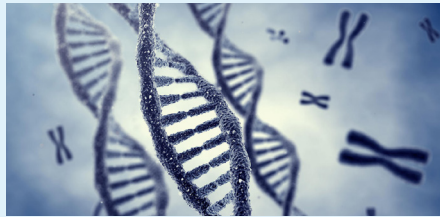
**SNS Research** (Dubai, UAE) estimates that **Big Data investments** in healthcare and the pharmaceutical industry will **reach nearly \$4 billion USD in 2017**, led by more business opportunities for healthcare providers, insurers, payers, government agencies, and pharmaceutical companies. These are **expected to grow at a CAGR of more than 15%** over the next three years.

According to a **MarketsandMarkets** study, the **Global mHealth Solutions Market** is **expected to reach \$90.49 billion** in value by the year 2022, up from the current \$21.17

billion in 2017. (That's a CAGR of 33.7%).

According to a report from **SNS Telecom** (Dubai, UAE), **Big Data vendors in the healthcare and pharmaceutical industry will pocket nearly \$4 billion USD** from hardware, software and professional services revenues, with **investments expected to grow** at a CAGR of more than 15%, **to \$5.8 billion by 2020.**

The report also reveals that the use of Big Data by hospitals and other healthcare facilities so far have **reduced costs up to 10%, improved outcomes up to 20%** for certain conditions, and **grown revenue as much as 30%.**



In a perhaps disturbing **Medscape** (New York, NY) **poll of over 1,000 physicians**, **21% of respondents** characterized the ideas and practices of **patient empowerment** as **"annoying,"** versus **54%** of respondents who found it **"helpful."**

In an opinion piece for *Nature*, **Vivienne Parry** of Genomics England (London, UK) **advised the genetics industry to engage in greater dialogue** with larger society due to the recent use of CRISPR-Cas9 gene-editing techniques to correct a heart defect mutation in human embryos. Parry said the dialogue could **avoid ostracization of the scientific community** over so-called "designer babies."



Global healthcare market research and clinical media firm **M3 USA** (Fort Washington, PA) launched a division dedicated to **pharmaceutical industry marketing and educational**

**communication** to the physician market.

Consumer insights firm **Crimson Hexagon** (Boston, MA) released its **proprietary image analysis capabilities** to help brands and agencies gain insights from photo data.

**InCrowd** launched **Global MicroTracker**, an expanded version of its automated market monitoring solution for life science and pharmaceutical brands.

Blogging at *PharmaPhorum.com* (Surrey, UK), **Carina Mikolajczak**, Senior Consultant at IQVIA (Hessen, Germany), advocated for a **higher level of social media listening** to improve patient experience. After studying the methodologies behind social media listening, she said it can be a **valuable source of information throughout the entire lifecycle of pharma products.**



Blogging via *Oxford University Press* (Oxford, UK), **Dr. James Galloway** detailed many **challenges presented by use of Twitter in medical research.** Issued prior to Twitter's character expansion, Galloway said the format's limited character count presented serious **challenges against full, nuanced conversations.** Coupled with a Twitter user adding their own judgment about relevant research, it could cause large discrepancies between the **actual content of a report,** and the **social media post representing it.**

According to a story from **HealthIT Analytics** (Danvers, MA), **Big Data analytics is fueling** the healthcare industry's **most newly consequential trends**, including predictive analytics, machine learning and precision medicine.



In a response to American patients' widespread misunderstanding of healthcare practices, **Merck** (Kenilworth, NJ) **initiated new practices in 2011 to proliferate health literacy**. In a piece published by *Quirks*, Merck Department Head, Global Customer & Brand Insights **Lisa R. Courtade** and Global Health Literacy Director **Laurie Myers** detailed **dividends from the new approach**, and their plans to **recommend similar approaches** to the **FDA** and other pharma companies.



**Cello Health** (New York, NY) acquired biopharma analysis and insights business **Advantage Healthcare** (Princeton, NJ) for **\$1.5 million USD** in cash and a **deferred consideration of up to \$3 million** dependent on financial performance through June 2021.

Executives from **Oglivy CommonHealth Worldwide** (Parsippany-Troy Hills, NJ) were honored as **ELITE (Exceptional Leaders Innovators Transformers Entrepreneurs) Award** winners by pharma marketing industry magazine **PM360** (New York, NY): **Iyiola Obayami** was honored in the "Data Miners" category, while **Angelo Campano** was recognized in the "Disruptors" category.

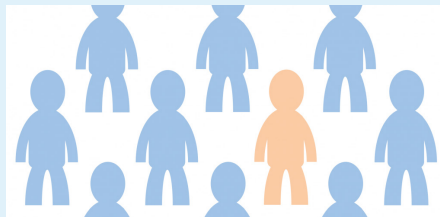
A study commissioned by **Simplee** (Palo Alto, CA) and conducted by **Forrester Consulting**, revealed that **implementation of patient financial care technology has doubled patient satisfaction** and generated a **505% increase in ROI** – all with a three-month payback. Those results were based on investments in the Simplee Platform for Patient Financial Care.



According to the UK's **National Health Service** (London, UK) and in response to its own lack of digital sharing systems, **NHS doctors are increasingly turning to interaction** in social media groups on platforms like **Facebook, WhatsApp** and **Snapchat** to **share details about patients**, regardless of an organizational ban on Internet-based messaging apps.

**Toluna** (Wilton, CT) announced a strategic partnership with healthcare-focused digital platform **Treato** (Princeton, NJ), which will provide Toluna with **access to Treato users for the purposes of survey research**.

**Truven Health Treatment Pathways**, an analytic tool designed to expedite analyses, includes **boosted propensity scoring to better control confounding and bias** using advanced boosting technology instead of traditional logistic regression.



Writing for *PharmExec.com*, John Pagliuca, VP, Life Sciences at SCIO Health Analytics, opined that **life sciences and pharma commercial personnel have the potential to study a variety of conditions by** examining an entirely untapped market: **undiagnosed patients**. Informing physicians regarding undiagnosed patients may enhance patient care and benefit a practice's growth. **Behavioral analytics may be an effective method** to identify these "hidden" patients.

According to *European Pharmaceutical*

*Review*, **pharma, biotech and clinical research leaders** will participate in 2018 in "Bridging Clinical Research and Clinical Health Care Collaborative," a conference scheduled for April 4-5 at the Gaylord National Resort in National Harbor, MD.



**WPP's** Data Alliance and healthcare data business **Crossix Solutions** (New York, NY) announced a partnership. WPP operating companies can use Crossix's data and analytics solutions for audience segmentation and insights.

**MedSurvey** (Southampton, PA) appointed **Paul Golota** its new CEO... Healthcare MR firm **Exevia** (Nürnberg, Germany) appointed **Louise Gillis** as Director, U.S. Lead. Gillis will be based in New Jersey.



**Informa Group** (London, UK) appointed **Richard S. Veal** Director of its Pharma Consulting division... **Future Thinking** (London, UK) hired **Mohamed Muhsin** as Head of Pharma UK, and **Veronique Bonrepaux-Caux** as Head of Healthcare France.

**inVibe Labs** (Costa Mesa, CA) appointed **Sunny Shah** its VP Insights... **Simpson Carpenter** (London, UK) hired **Rachel Skevington Britton** as an Associate Director for its pharma and biotech division.

**Prescient Healthcare Group** (San Francisco, CA) appointed **Carolyn Dodd, Pip Keys** and **Jim Goldenberg** as leads for its Stakeholder Insights Business.

**Research Partnership** (London, UK) introduced **Anne Cunningham** as Director,

## PMR<sup>2</sup> News Notes (continued)

European division, **Morten Andersen** as Associate Director and **Sue Rees** as Specialist in the Emerging Markets Division...

Pharma/healthcare market research firm **OMR Globus** (Toronto, ON) appointed former **SERMO/WorldOne** (New York, NY) executive **David Chikashua** its Operations Director... **Astellas** (Northbrook,

IL) promoted **Caroline Walkinshaw** to Executive Director, Market Intelligence & Analytics.

As **PMR<sup>2</sup>** went to press, CVS (Woodsocket, RI) announced its intention to acquire Aetna (Hartford, CT). **PMR<sup>2</sup>**

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RFL Publisher, Editor & Producer Bob Lederer is one of *Survey Magazine's* September 2014, *20 Researchers You Need to Know*.

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# Pharma Market Research Report (PMR<sup>2</sup>):

## What some of the smartest pharma and healthcare MR executives see changing in 2018 – 2019

Your 2018 plans are likely set, but is it possible that, perhaps, you overlooked something important?

Spend a few minutes with the enclosed 13th Annual **PMR<sup>2</sup> Predictions Issue**. Then, decide whether any adjustment may be in order.

Market researchers in pharma, healthcare, biotech and medical device industries have only one place to go for the latest news in the field: **PMR<sup>2</sup>**

The December 2017 issue is especially insightful for the quality observations made by leading MR and insights executives from all over the industry.

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**Bob Lederer**  
**Editor & Publisher**



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