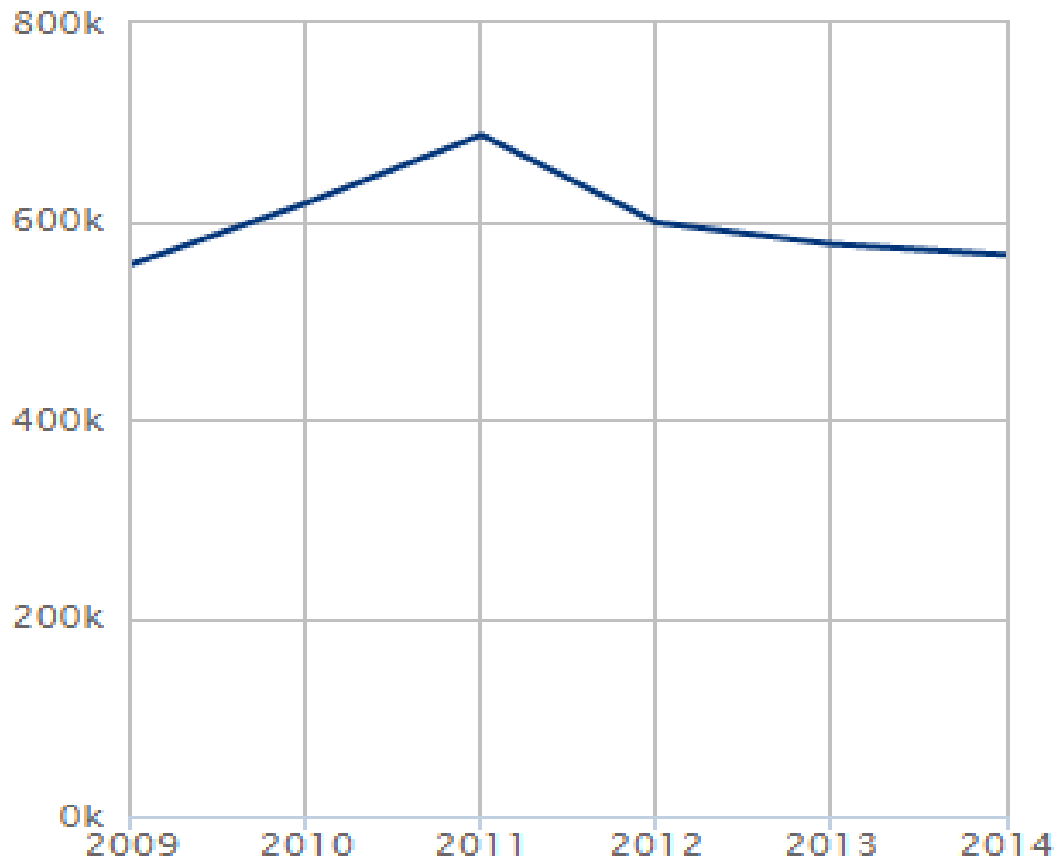




Remaining Competitive

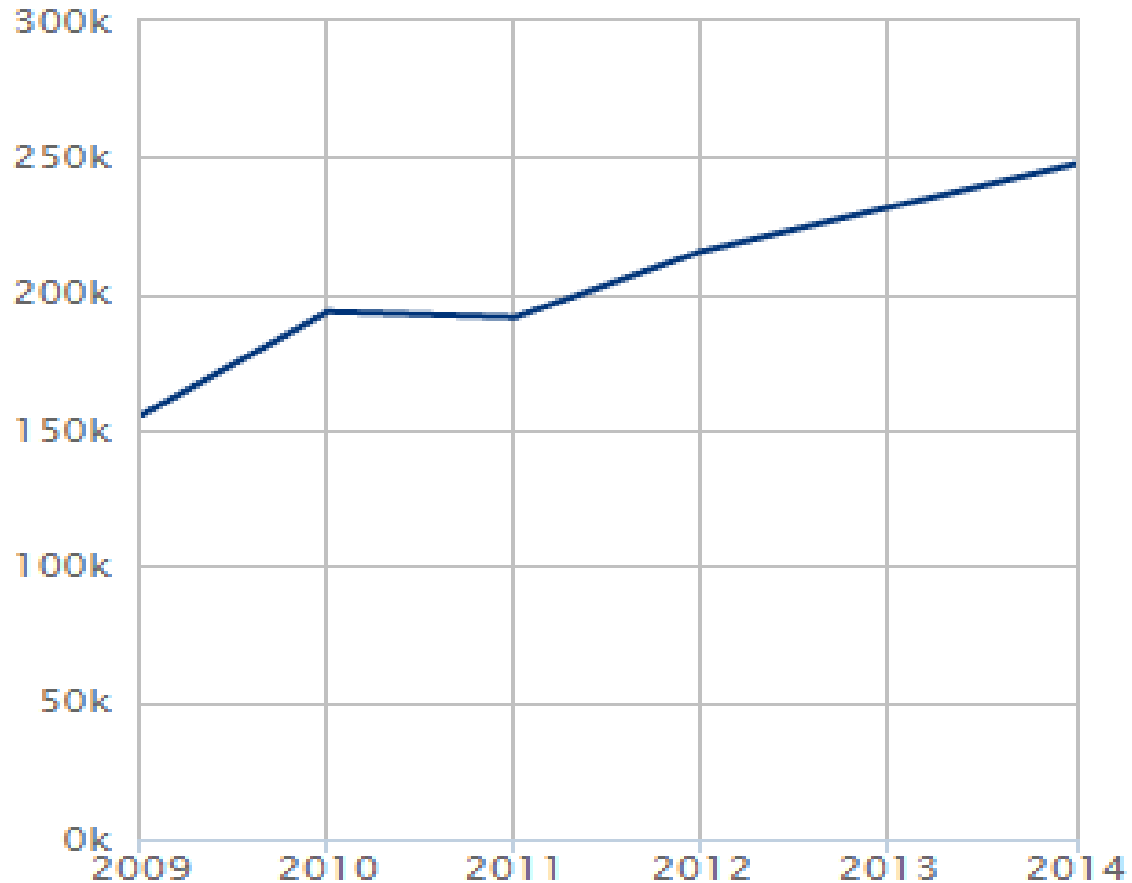
Silvia Coulter, Principal
FICPI Canada, February 2016

World-Wide Granted Patents Filings Since 2009



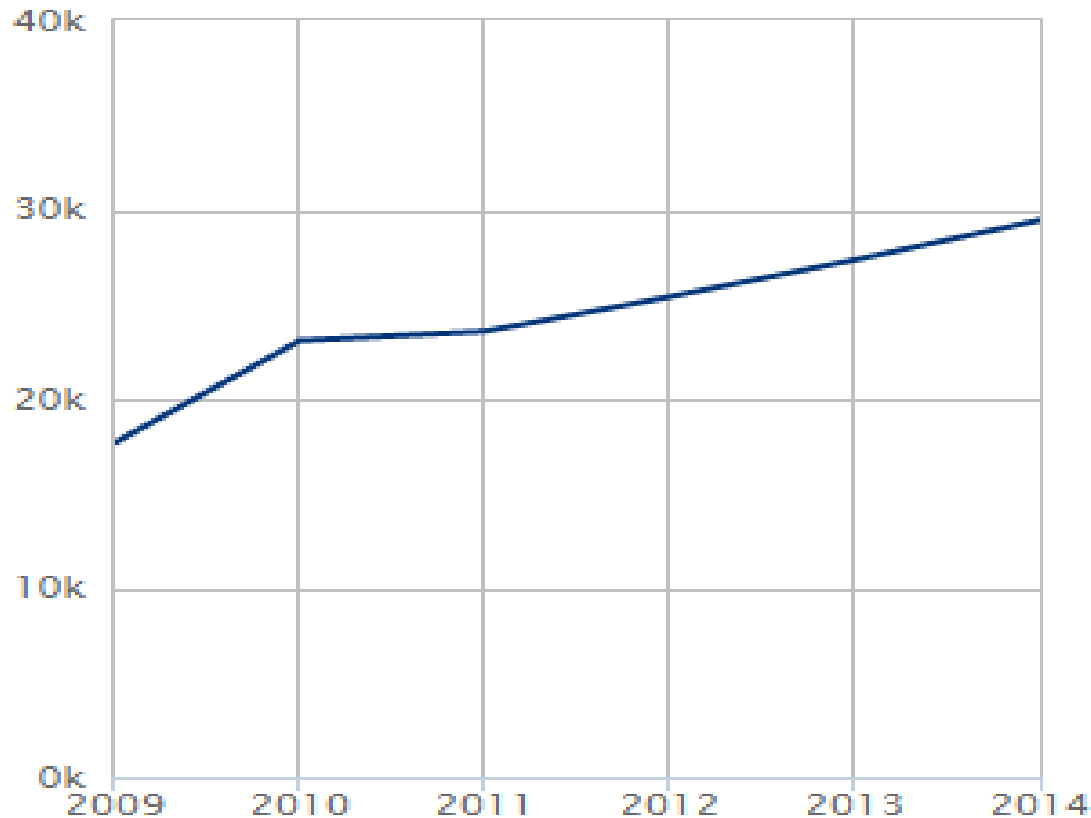
Leveled out significantly in the past 5 years

Granted Patents Filed in the U.S. Since 2009



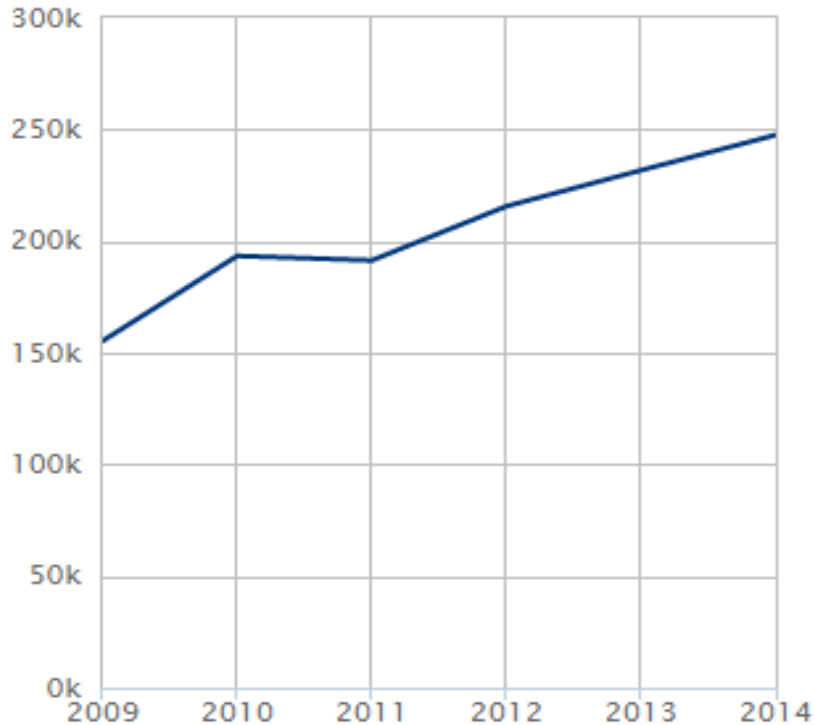
Steadily increasing over the past five years

Granted Patents Filings by Identified IP Boutiques

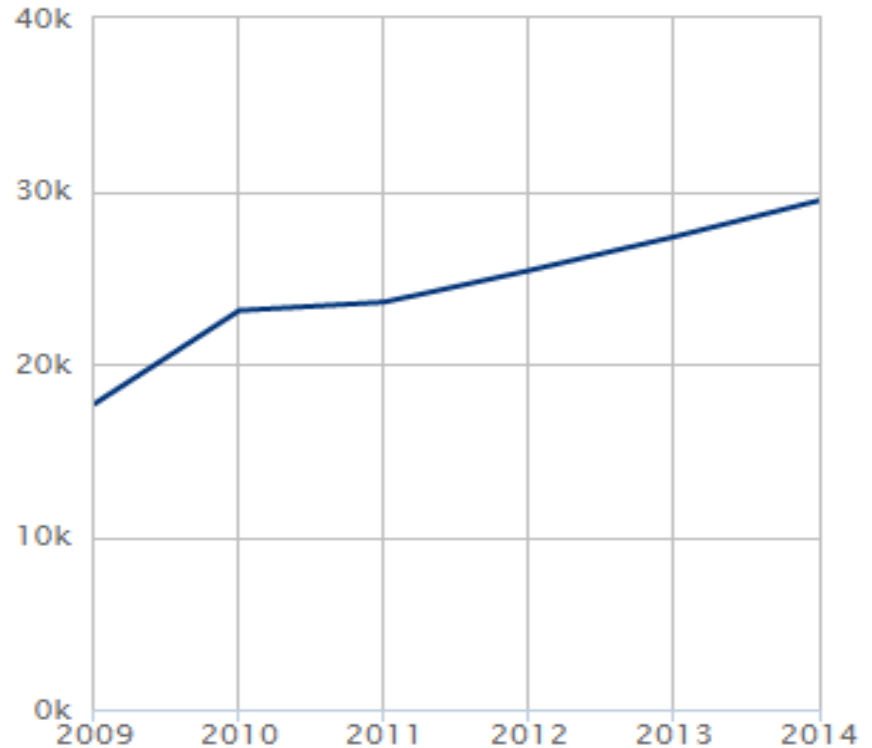


Material increase in filings over the past five years

IP Boutiques Mirroring U.S. Market?

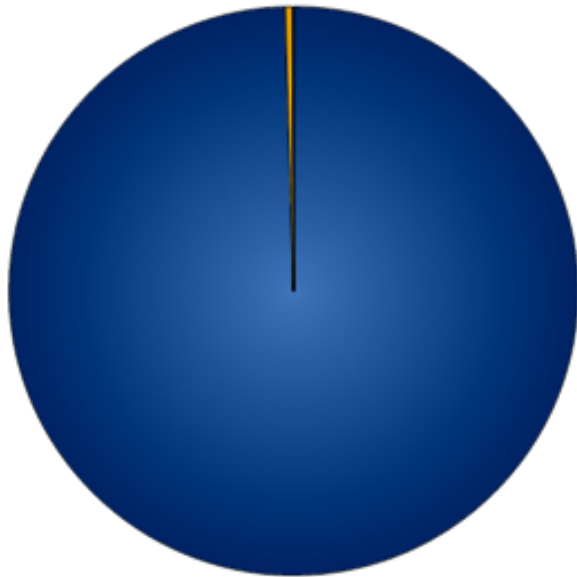


Total GP Filed in the U.S.



Total GP Filed by IP Boutiques – slightly outpacing U.S. market

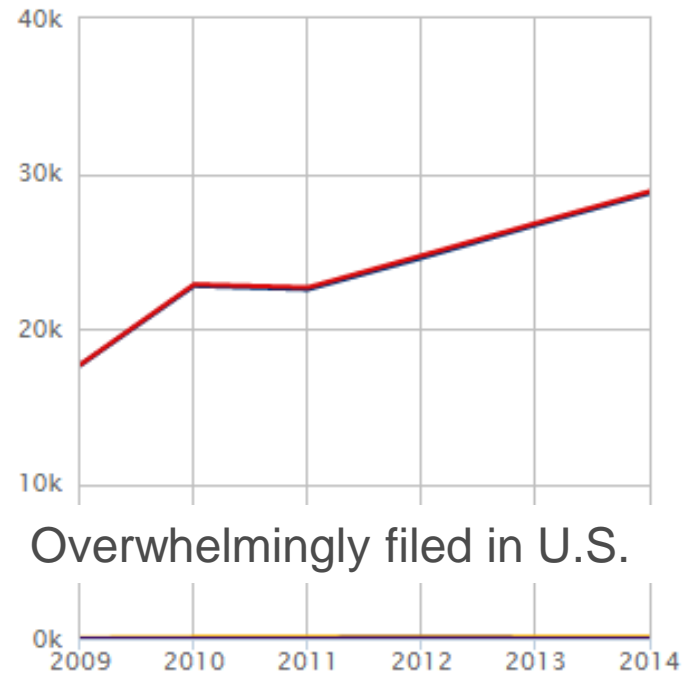
IP Boutiques: Granted Patents Filing Office Locations



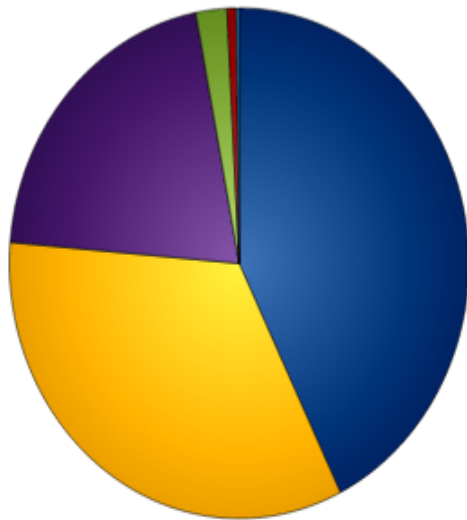
Filing Office Location	Occurrences	%
United States of America	142873	99.5%
European Patent Organization	583	0.4%
Germany	64	<0.1%
Accumulative Total	143520	100.0%

Granted Patents by Country Trend

Click on a chart and drag mouse to zoom in on a chart area.

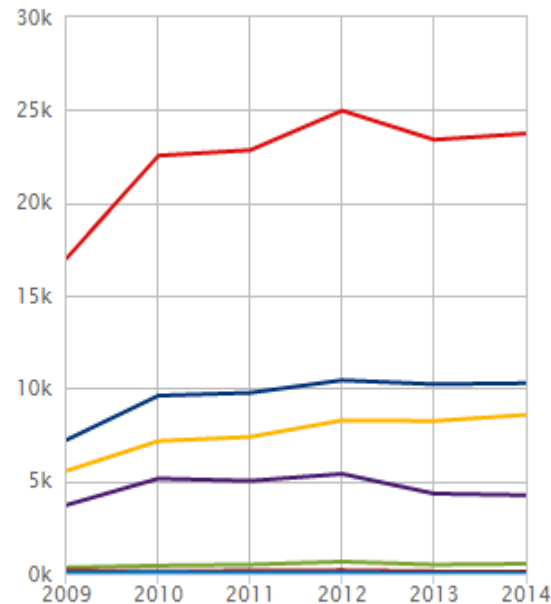


IP Boutiques: Granted Patents Company Location



Location	Occurrences	%
Asia	57475	42.7%
United States	45144	33.6%
Europe	27770	20.7%
Americas (except US)	2943	2.2%
Australia and Oceania	846	0.6%
Africa	267	0.2%
Accumulative Total	134445	100.0%

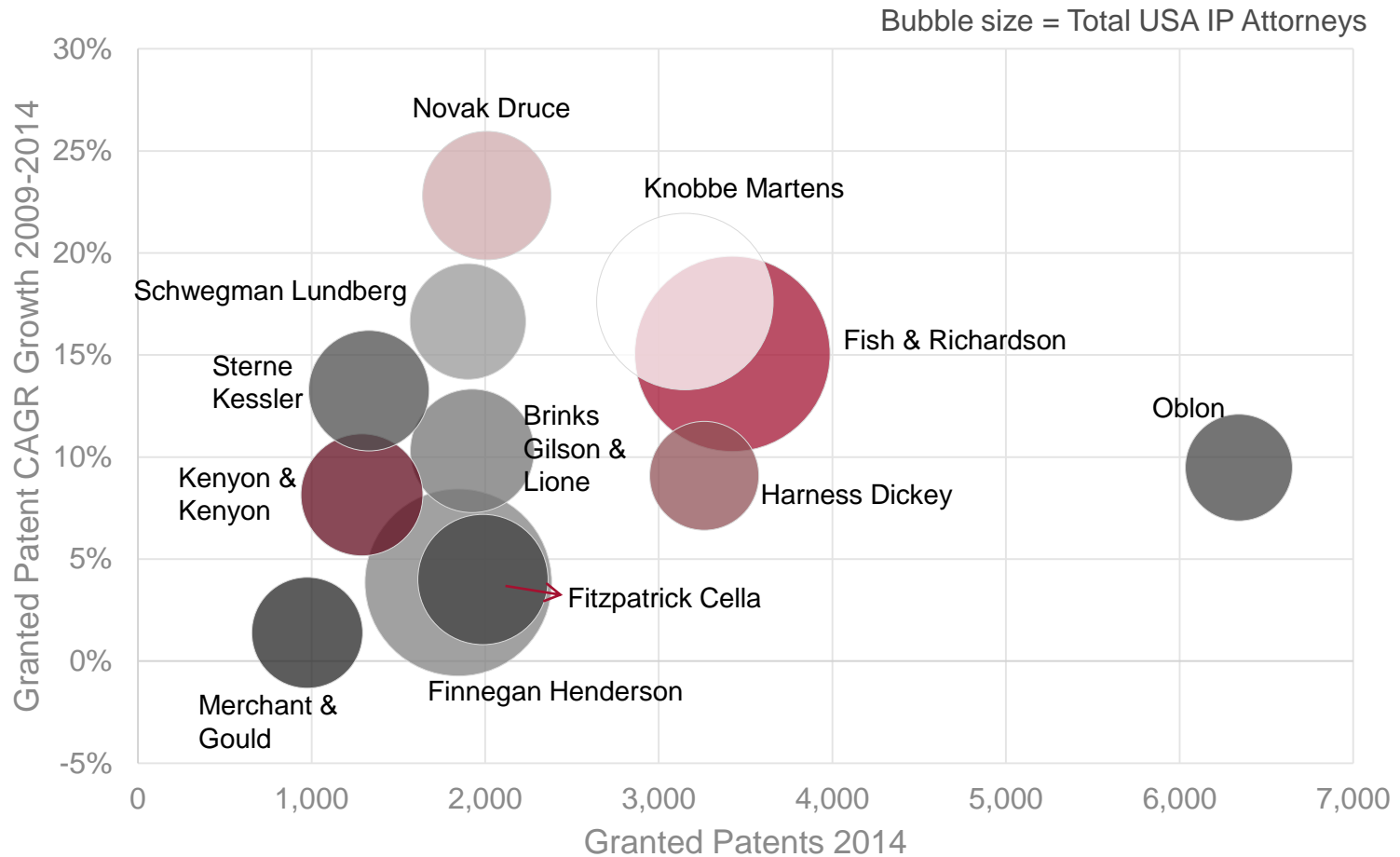
Click on a chart and drag mouse to zoom in on a chart area.



- Steady rise in granted patents filed U.S. companies

- Asia consistently dominant

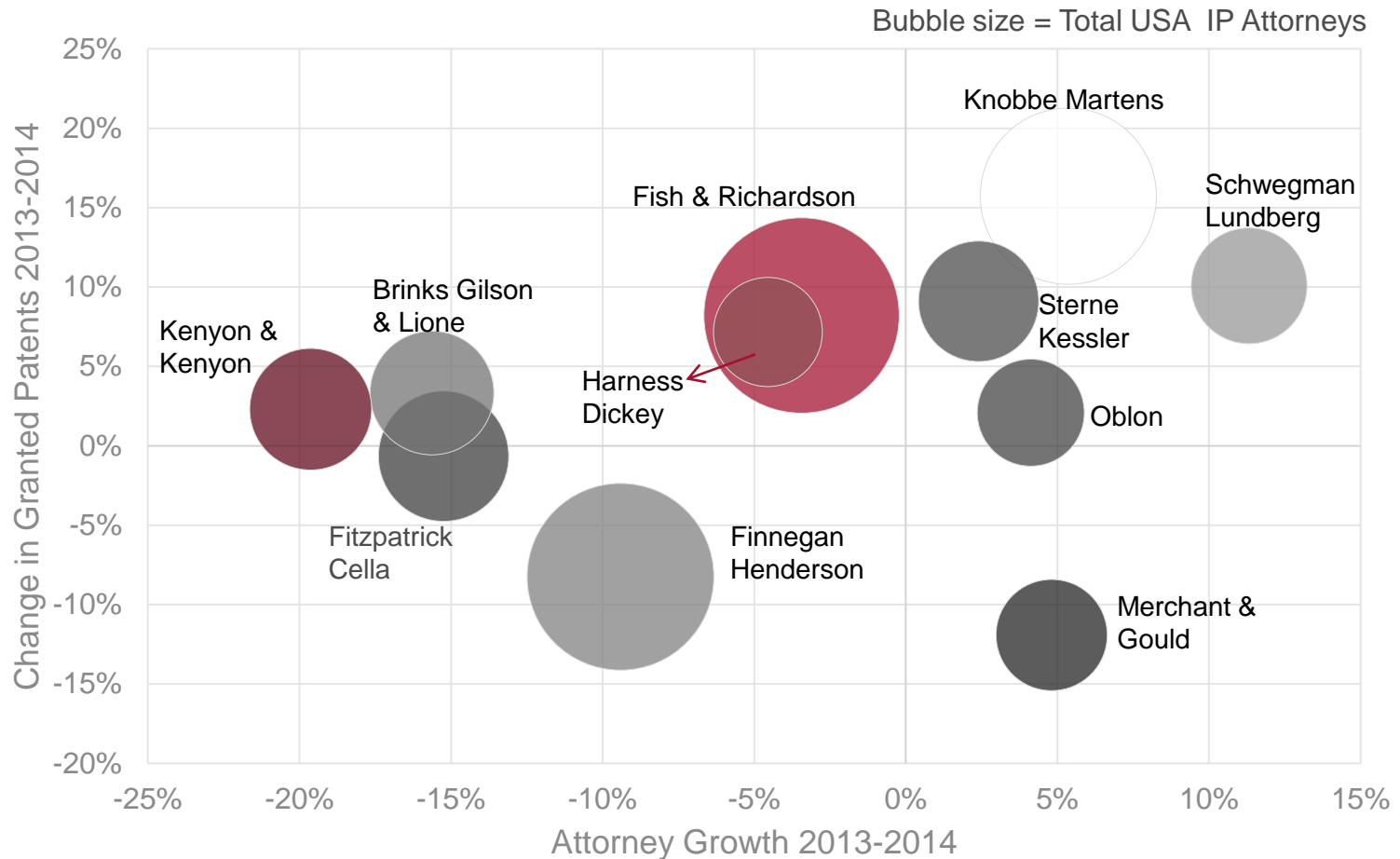
IP Boutique Firms - Landscape of Growth & Production



Note: Novak Druce merged with Connolly Bove in January 2013

Sources: MonitorSuite & Law360

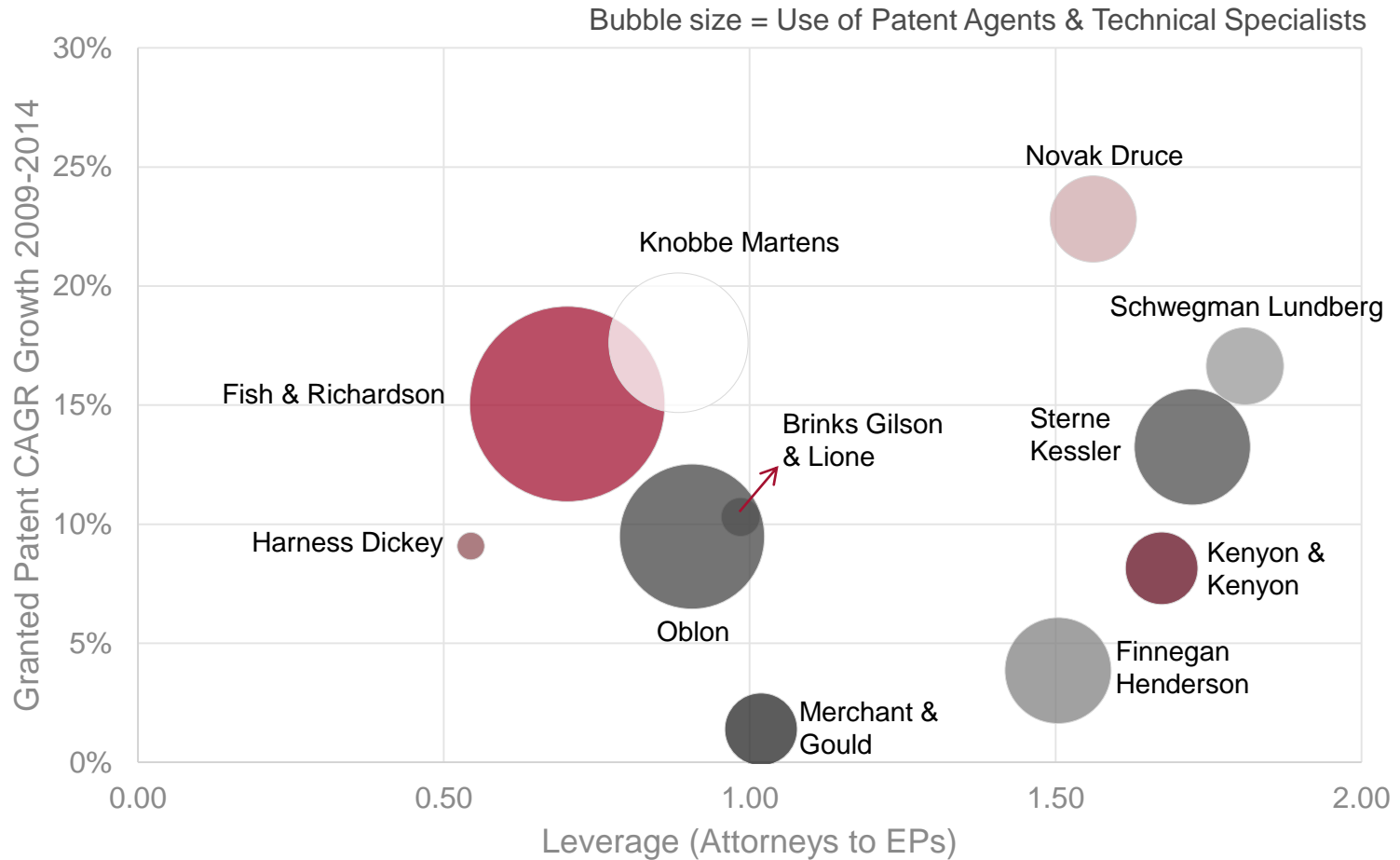
IP Boutique Firms - Over the Past Year



Note: Excluded Novak Druce as their percentages were skewed from the recent merger

Sources: MonitorSuite & Law360

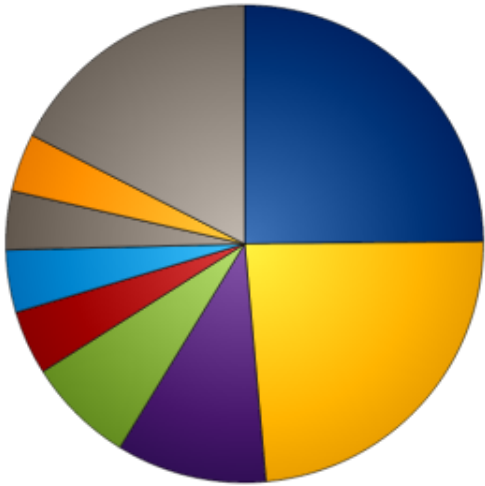
IP Boutique Firms – Growth vs Firm Structure



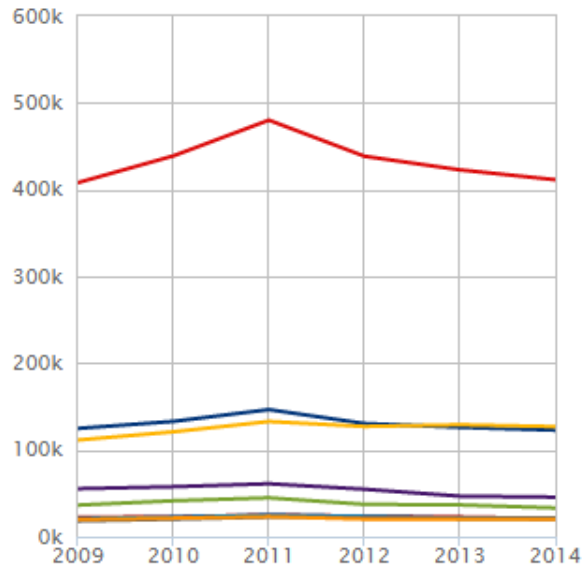
Note: Excluded Fitzpatrick Cella as they didn't list Patent Agents or Technical Staff on their website

Sources: MonitorSuite, Law360, and firm websites

5 Year World-Wide Granted Patent Industry Overview



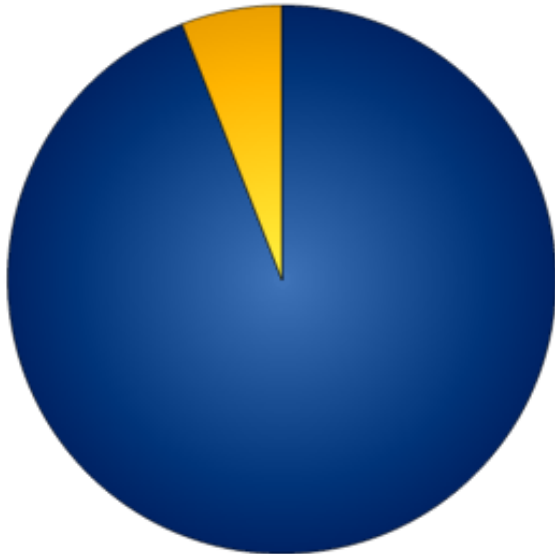
Click on a chart and drag mouse to zoom in on a chart area.



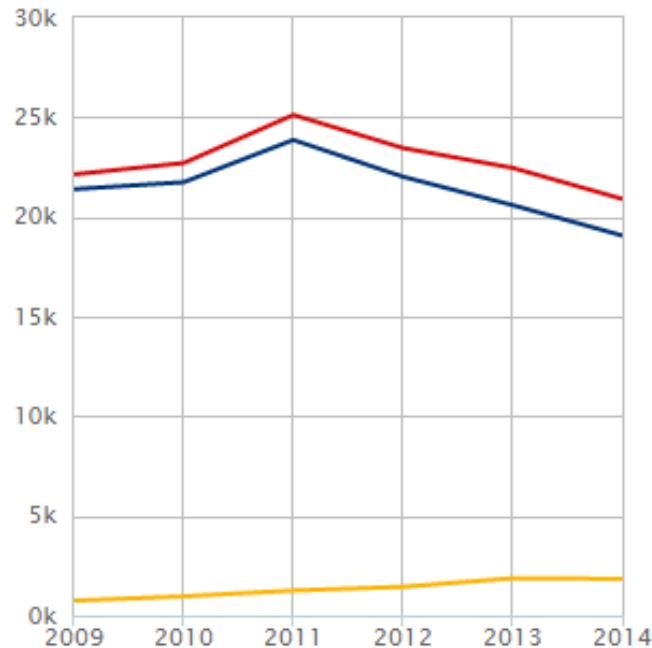
- Consistently dominated by Manufacturing & Tech work

Name	Occurrences	%
Industrial Manufacturing	782764	24.9%
Technology	747405	23.7%
Consumer Products	320328	10.2%
Automotive & Transport	229002	7.3%
Pharmaceuticals	136643	4.3%
Retail	133632	4.2%
Health Care	125302	4.0%
Chemicals	124242	3.9%
Other Industries (Full List)	549903	17.5%
Accumulative Total	3149221	100.0%

5 Year World-Wide Pharmaceutical Granted Patent Industry Overview



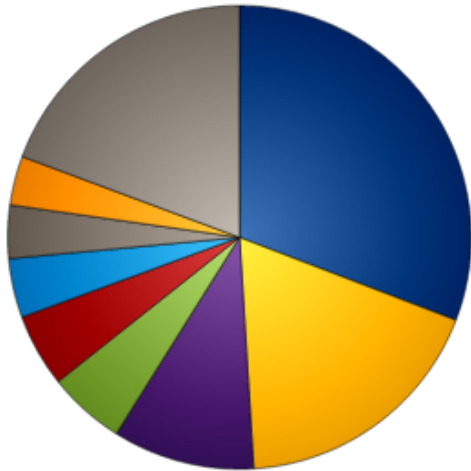
Click on a chart and drag mouse to zoom in on a chart area.



- Gradual drop-off in Pharma work

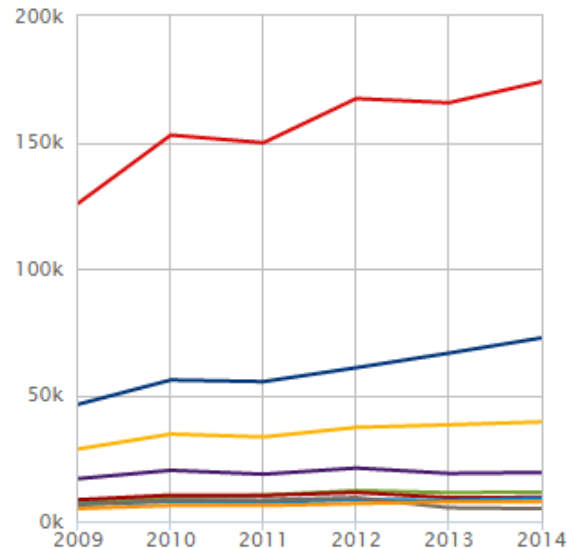
Name	Occurrences	%
<input type="checkbox"/> Pharmaceuticals > Drugs	128649	94.1%
<input type="checkbox"/> Pharmaceuticals > Drugs, Drug Proprietaries, and Druggists' Sundries	8108	5.9%
<input type="checkbox"/> Accumulative Total	136757	100.0%

5 Year United States Granted Patent Industry Overview



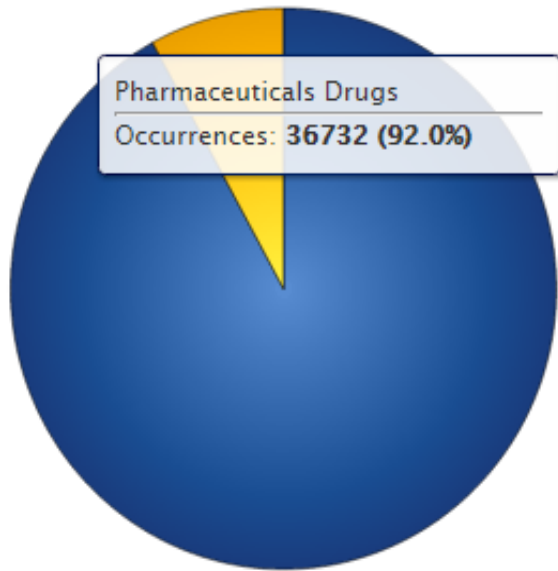
Name	Occurrences	%
<input type="checkbox"/> Technology	357253	30.8%
<input type="checkbox"/> Industrial Manufacturing	211051	18.2%
<input type="checkbox"/> Consumer Products	114887	9.9%
<input type="checkbox"/> Health Care	62286	5.4%
<input type="checkbox"/> Retail	59247	5.1%
<input type="checkbox"/> Automotive & Transport	47711	4.1%
<input type="checkbox"/> Services	42961	3.7%
<input type="checkbox"/> Pharmaceuticals	39842	3.4%
<input type="checkbox"/> Other Industries (Full List)	223957	19.3%
<input type="checkbox"/> Accumulative Total	1159195	100.0%

Click on a chart and drag mouse to zoom in on a chart area

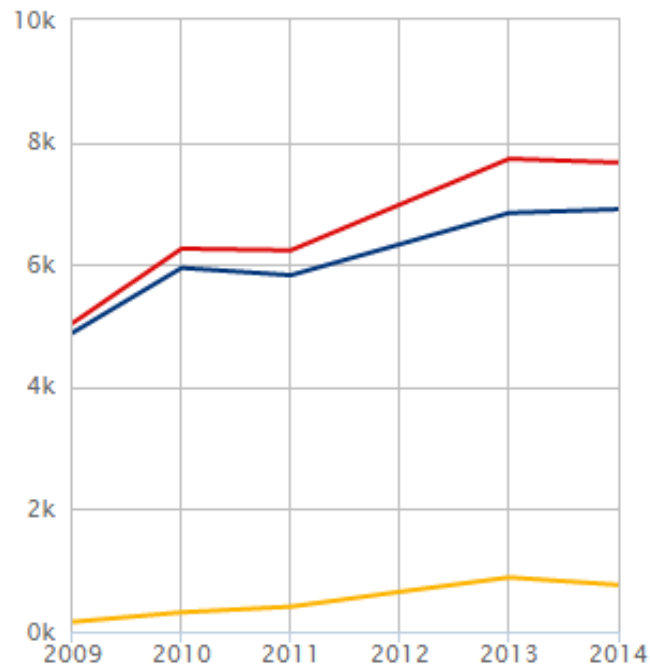


- Consistently dominated by Tech & Manufacturing work

5 Year United States Granted Patent Pharmaceutical Industry Overview



Click on a chart and drag mouse to zoom in on a chart area.



- Gradual increase in Pharma work

Background

Firm	Firm Branding or Monitor Suite GP Industries 2009-2014
FISH & RICHARDSON P.C.	Perhaps the premiere full service IP firm; technology dominates their patent filings
FINNEGAN, HENDERSON,	Mix of consumer products, industrial manufacturing, technology, & automotive/transport filings
KNOBBE, MARTENS	Heavy technology patent filings (with strong growth), followed by consistent health care and industrial manufacturing work
FITZPATRICK, CELLA	Nearly all patent filings in the retail industry
NOVAK DRUCE	Surging industrial manufacturing & technology filings, with steady chemical work
BRINKS GILSON & LIONE	Increased technology & telecommunication filings while industrial manufacturing work tails off
KENYON & KENYON LLP	Substantial industrial manufacturing patent filings, with automotive/transport & technology a consistent 2 nd and 3 rd
STERNE, KESSLER,	"Our team understands technology and is known for anticipating the next big thing - from biotech to nanotech, cleantech, digital healthcare and so on..."
SCHWEGMAN, LUNDBERG	Patent Protection for High Technology
MERCHANT & GOULD	Recent noticeable drop off in technology filings (their most involved industry); consistent manufacturing and telecommunications work
HARNESS DICKEY	Consistent top four industry filings: consumer products, industrial manufacturing, technology, & retail
OBLON	Mix of industrial manufacturing, consumer products, & retail patent filings

- Manufacturing and Technology continue to dominate
- Pharma is pursued at a high level by firms yet is shown as dropping off
- U.S. and Asian companies make up 76.3% of granted patents

Canada

- What Trends are You Seeing?
- Do the industries and geographic markets seeking patents in Canada mirror what we've just heard?
- What can you do to retain your share of the work?

What is The Best Way to Respond and Compete?

Business Development and Relationships

PRINCIPLE # 1: Relationships Drive Business

- People hire people they like and whom they trust



PRINCIPLE # 2: Business Development Volume is Critical

- Whether formal or informal, a high level of activity is necessary for success



PRINCIPLE # 3: Value Propositions Will Open Doors

- Reach out with 'need to know' information



PRINCIPLE # 4: Constant and Ongoing Communication is Imperative

- Stay top of mind with people who matter—clients, referral sources and potential clients



PRINCIPLE # 5: Follow Up is Necessary

- The next step is always yours.



PRINCIPLE # 6: Business is Unpredictable

- Predicting where new business will come from is impossible . . .
targeting and volume of activity are key



Summary

- Be aware of the facts; find ways to compete effectively
- Focus on retaining existing relationships by keeping in touch
- Build new relationships by leveraging marketing tools, existing relationships and contacts
- Maintain a high volume for best results
- Conduct regular client feedback meetings to build loyalty

Thank You

- Questions?

Silvia Coulter

scoulter@lawvisiongroup.com

978-526-8316