



What's the DTC Payoff?

Trends in DTC Awareness and Action: Understanding the Impact of Investment Levels

DTC spending rose slightly in 2009, yet consumer recall of DTC overall continued to decline. An analysis of the advertising impact of two drugs in the depression category, however, tells a more important story than recall data alone reveals.

BY KATHY ANNUNZIATA

Despite the continuing economic impact on the pharmaceutical industry, DTC spending rose 4 percent on new drug launches and aging blockbusters in 2009, according to data compiled by Kantar Media. But while pharma companies dialed up spending, consumer recall of these messages continued to fall, albeit at a slower pace than in recent years.

Is the increased spending having a positive effect? To explore this question, Kantar Health conducted an analysis of its National Health and Wellness Survey (NHWS), the largest international database of self-reported patient healthcare information.

Awareness drops, but pace slows

Looking across all U.S. adults, the percentage who remembered seeing or hearing a DTC ad over the past six months through any channel – TV, radio, magazine, newspaper, Internet or in a doctor's office – remained virtually unchanged at 69.2 percent versus 70.6 percent in 2008 (see Figure 1). The results from 2009 are a continuation of a downward trend that started five years ago. In 2006, DTC ad recall among U.S. adults was 75.7 percent, but this number has dropped each year since.

The same trend exists when we examine specific conditions – even those that usually have had high DTC investment levels. Among patients with asthma – traditionally a high-spend category – DTC ad recall has fallen each year, from 80 percent in 2006 to 73 percent in 2009. This pattern is repeated among patients suffering from a variety of conditions. From 2006 to 2009, DTC ad recall fell from 80 percent to 75 percent in patients with self-reported depression; from 82 percent to 77 percent in patients with self-reported pain in the past year; and from 81

percent to 77 percent in patients with self-reported insomnia or sleep difficulties (see Figure 2).

Focus on 'depression' market

To gain even greater insight into the effect of spend on results, Kantar Health looked at two drugs in the highly competitive depression market and examined patient recall of their ads, and whether the ads caused patients to take any action. Faced with Pristiq's launch, Abilify significantly increased its DTC spend over 2008. In contrast, Cymbalta's DTC spend remained virtually flat year-over-year. What was the effect on recall and action taken?

Let's look first at ad recall at the brand level. Abilify increased its DTC ad spend by 40 percent, according to Kantar Media, and this increase yielded much higher returns in terms of ad recall. In 2008, brand recall of Abilify among adults with self-reported depression was only 1.3 percent, but that number

Fig 1: DTC Trends – Recalled an Ad

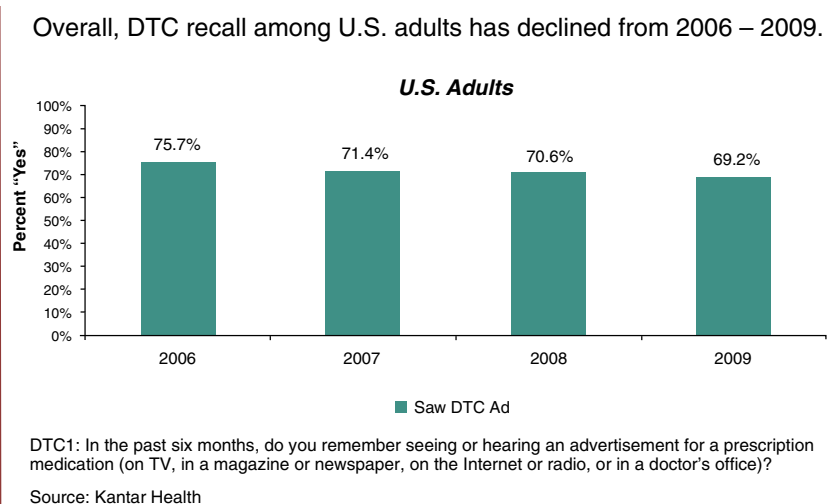
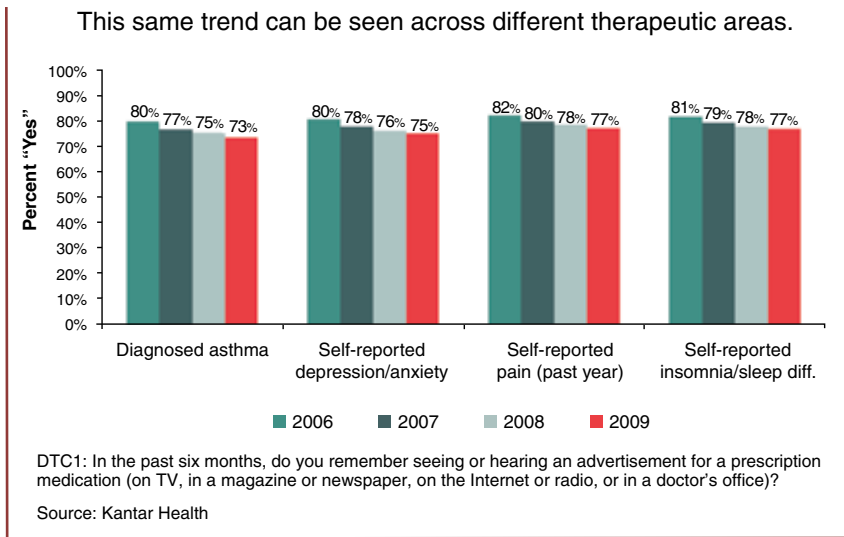


Fig 2: DTC Recall by Condition



reported depression, from 8.02 percent to 10.36 percent, and a 27 percent increase in brand recall among those with diagnosed depression, from 10.05 percent to 12.74 percent. The increase in spend drove Cymbalta from fourth place in overall brands recalled by depressed adults in 2008 to second place in 2009.

While brand recall increased for both Abilify and Cymbalta, Abilify's increased ad spend significantly narrowed the gap between it and Cymbalta. In 2008, Abilify was not among the top 20 brands recalled by adults with either self-reported or diagnosed depression, while Cymbalta was the fourth-most recalled brand among adults with self-reported depression and third among adults with diagnosed depression. Cymbalta moved ahead to the second position in both categories in 2009, but Abilify brand recall leapt into the top 10: in the sixth position

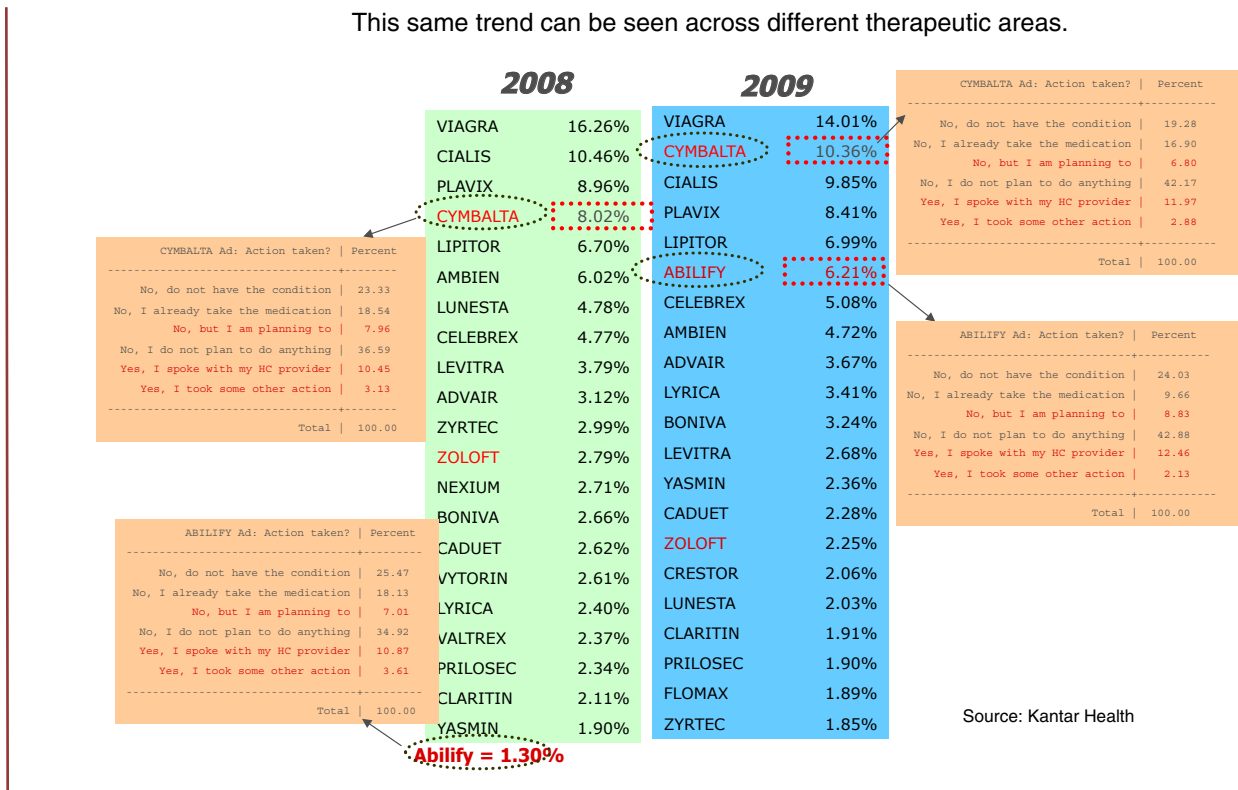
jumped to 6.21 percent in 2009. Likewise, recall rose among those with diagnosed depression – from 1.67 percent in 2008 to 7.55 percent in 2009.

In turn, Cymbalta's advertising rose only 2.3 percent in 2009 versus 2008, according to Kantar Media. This resulted in a 29 percent increase in brand recall among adults with self-

among adults with self-reported depression and fifth among adults with diagnosed depression.

Just remembering a brand, however, is not all that DTC marketers want in terms of measuring effectiveness; they also want consumers to take action. Abilify's increased spend was effective in motivating a key patient group – adults with self-

Fig 3: Top Brands Recalled by Adults with Self-Reported Depression (% of all adults)



reported depression – to speak to a healthcare professional or to take another action to learn more about the drug. An impressive 23 percent of adults with self-reported depression had either taken an action or planned to take an action as a result of seeing a DTC Abilify ad. That number was slightly higher among adults with diagnosed depression; nearly one in four had either taken an action or planned to after seeing an Abilify ad.

Cymbalta's flat DTC spend between 2008 and 2009 resulted in the proportion of patients taking action after seeing an ad remaining flat as well.

Cymbalta's flat DTC spend between 2008 and 2009 resulted in the proportion of patients taking action after seeing an ad remaining flat as well – approximately 22 percent among adults with self-reported depression and 23 percent among adults with diagnosed depression. While these numbers were slightly higher than Abilify's in 2008, Abilify's ad inspired a greater percentage of patients to take action in 2009 compared to Cymbalta (see Figure 3).

A few conclusions

Despite increased spending in DTC, overall consumer awareness continues to steadily decline. However, when reviewing the results among a targeted group of patients, the net result may bring good news to pharma companies interested in reaching consumers. In the examples of these two depression brands, the increased DTC spend for Abilify (marketed by Bristol-Myers Squibb) resulted in a larger portion of depressed patients recalling the ad from the previous year. More importantly, one in four patients recalling an Abilify ad took proactive steps after hearing the messages. While the spending change for Cymbalta was not as dramatic, the Eli Lilly medication became the second-most recalled drug among depression patients. Increased awareness among sufferers, even by small increments, can eventually lead to a greater number of patients taking action and having the conversation with a physician. **DTC**

Kathy Annunziata is vice president of research services for Kantar Health. She has been with Kantar Health and its legacy company, Consumer Health Sciences, for 10 years. She can be reached via e-mail at kathy.annunziata@kantarhealth.com or by telephone at (609) 720-5482.

REACH DTC MARKETERS FOR LESS

Advertise in *DTC Perspectives Magazine*



Targeted Reach The only industry trade publication focused solely on DTC Marketing

Cost Effective Pay significantly less than with other journals and reach over 2,000 pharma marketers out of a total circulation of 6,800 industry pros

Engaged Readers Premium content delivers practical insights, read cover-to-cover by the people you want to reach

For more information please contact Stacey Hagenbush, Stacey@dtcperspectives.com, 973-377-2106 x225

Value-added packages available for 4 time advertisers.
Opportunity for integrated presence through *DTC Perspectives* and the DTC National Conference