The Battle for Men’s Health
Getting Men to Pay Attention AND Take Action

Men’s 360 View of all Men’s Health Ad Campaigns in Q4, 2011
Why Did it Take Moses 40 Years to Cross the Desert?
Why Did it Take Moses 40 Years to Cross the Desert?

He didn’t want to ask for directions!
Sadly, that’s true about MEN taking care of their own health too!

- While 9 of 10 men 45+ will repeatedly experience symptoms related to their prostate, hormones, erectile function or levels of uric acid…
  - Men are reluctant to seek help. Women out number men two to one in waiting rooms!
- Worse, men with these undiagnosed symptoms have a 6-fold increased risk for life-threatening comorbidities.
  - Yet treatment for these symptoms is 4 times less likely than other conditions!
- Getting men to talk to their doctor has spawned the largest outpouring of DTC. But, do they work?
  - Today we will answer that question:
- 1st from findings of a large media consumption study of the entire men’s health category
- 2nd from a case example of the making of “Is it Low T” campaign.
  - How big is this issue?
The U.S. Men’s Health Market: Age 45+ is One of the Largest

Men 45+ are 57 million
...And growing 14% by 2020, 27% by 2030.

Source: 2010 Census projection
3 of 4 Men 45+ Have Treatable Symptoms

Only a 1/4th do not.

Does that make them an easy target for a marketer?

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
Where is the Battleground for the Most Category Growth?

Does opportunity lie within the 38% diagnosed ...

... Or within the 38% with symptoms?

Source: Phoenix Healthcare ‘s 360° Men’s Health Pilot 2012
While it Looks Like More than Half are Open for a Treatment...

Source: Phoenix Healthcare ‘s 360° Men’s Health Pilot 2012
The Opportunity Shrinks to Only 25% Due to So Many Experienced Treaters

- The Battleground is not among the already diagnosed.
- Finding prospects means looking at the UNDIAGNOSED.

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
Men with Undiagnosed Symptoms More than Doubles the Opportunity for New Patients

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
OK, So Aiming at Men with a Symptom Sounds Easy Enough!

*Just ask a simple question...or two!*

Do you have:
  ✓ Trouble urinating
  ✓ Urinating often
  ✓ Feeling like bladder is not empty
  ✓ Trouble having sex
  ✓ Reduced sexual desire
  ✓ Depression
  ✓ Diminished muscle tone
  ✓ Tenderness, redness or extreme pain in a joint (e.g., big toe)

*And get a simple answer?*
The Answer is Not So Simple in this Market!

*72% of men with at least one symptom will have “Co-mingled Co-morbidities.”*

Multiple undiagnosed symptoms, diagnosed and not treated and experiencing other symptoms, treated but with other untreated diagnoses or undiagnosed symptoms, treated for multiple conditions with other symptoms yet diagnosed, treated for one, diagnosed with another, and symptoms for a third...

....well, you get the picture!

Right?

Source: Phoenix Healthcare ‘s 360° Men’s Health Pilot 2012
The Answer is Not So Simple in this Market!

72% of men with at least one symptom will have “Co-mingled Co-morbidities.”

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72% of men with at least one symptom will have “Co-mingled Co-morbidities.”

- Average = 2.2 symptoms
- 12% with more than one symptoms have all 4.

If men can’t see themselves fitting neatly in a “single category” then predicting how they will respond to one DTC campaign becomes, well..... challenging.

Look at it from their point of view.

Source: Phoenix Healthcare ‘s 360° Men’s Health Pilot 2012
Connecting a set of symptoms to a condition, with a promising treatment, or a brand is a VERY confusing journey especially with all the NOISE in the marketplace.....!

Source: Competitrack
How Much Noise?  
15 Brands Spending over $400 Million  
...And growing

ED, Low T, BPH, and Gout  
Television, Print, and Banner Ads Spend

Source: Competitrack
That is a Large Chunk of Total DTC: About 10% in 2011

Source: Competitrack
That is a Large Chunk of Total DTC: About 10% in 2011

9%

<$ 5 Billion

DTC 2011

More than Women’s Health Combined

~15% more

Source: Competitrack
Accompanied by an Influx of Disease State Awareness (DSA) Ads in 2011

Source: Competitrack
WITH ALL THAT NOISE, WHAT CAMPAIGNS AND WHAT BRANDS DO MEN PAY ANY ATTENTION TO?
To Find Out: Phoenix Healthcare Sponsored a Study

- The study is syndicated in order to openly share results at DTC National Conference
- **Sample:** 1500 Gen. Pop. Sample of men 45+
- **Stimulus:** Men’s Health DTC run in quarter 4, 2011.

- **Objective:**
  - To measure exposure to DTC branded and DSA ads from 4 categories and derive their impact on driving men with symptoms to initiate a discussion about their condition with a physician.

- **Metrics:**
  - *Phoenix 360° Multi-media Campaign Gallery to measure exposure accurately and completely for all media.*
  - *Key Metrics: Category Campaign Recall (Branded and Disease State Awareness –DSA) and last 90-day behavior.*

* Included Levitra print from 2010 for baseline
We Measured 17 Campaign Galleries, 37 Creative Assets

Obvious big spenders are Cialis, Viagra, Uloric and both Takeda and Abbott for their disease awareness ads.

Campaign Spend: 2011
($000)

Source: Competitrack
Starting at a 50,000 Foot View: Branded versus DSA

• *Brand campaigns win attention even among the Asymptomatic.*

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
Starting at a 50,000 Foot View: Branded versus DSA

- **Brand campaigns win attention even among the Asymptomatic.**
- **DSA campaigns gain less attention overall.**

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012

Brands spending 10 times that of DSA producing less than 2 times recall the ROI for DSA is 6.1 over Brands.
At the Category Level: Which Campaigns Wins Men’s Attention?

- 9 of 10 men recall any ad from any ED branded campaign.
- BPH and Low T branded campaigns recall lags along with spending.
At the Category Level: Which Campaigns Wins Men’s Attention?

- Men pay equal attention to DTC outside of their symptom category - a sign of how co-mingled co-morbidities introduce a level of chaos and competition most trackers miss.
At the Brand Level: Who Wins?

Cialis campaign wins highest exposure recall, 80+% ahead of Viagra with newcomer, Uloric, close behind. “Is it Low T” and “Think you have gout” follow.
MEN WITH SYMPTOMS SEEM TO WATCH ANYTHING THAT MAY EXPLAIN THEIR SYMPTOMS OR PROMISES RELIEF. BUT, HOW DOES MORE EXPOSURE PREDICT MORE ACTION?
At 50,000 Feet: Exposure to Branded Campaigns Significantly Boosts Starting a Discussion with Doctors

Exposure to branded campaigns significantly lifts the percent of men willing to discuss their condition with their doctor over those who were not exposed.

Started a Discussion About Condition Among Those with Undiagnosed Symptoms

- Not exposed to Branded DTC: 28%
- Exposed to Branded DTC: 40%

A 43% lift

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
At 30,000 Feet: A Brand/DSA Campaign Combination Shows More Impressive Lift to Action

Among men with gout symptoms who recalled having been exposed to the “Think you have gout” DSA were three times more likely to started a discussion about gout than those who had not seen the campaign.

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
At the Brand Level: TV Wins Largest Proportion of Campaign Recall

- **TV ads win more than half of the Campaign recall, digital just 20%**.

Viagra Ads/Websites Contribution to Overall Campaign Recall

- (Campaign Recall = 76%)
  - 61% TV ads
  - 13% Print ads
  - 12% Digital ad
  - 4% 2 banners
  - 4% 1 YouTube

Viagra Ads/Websites Contribution to Primary Actions

- (Net Primary Actions = 19%)
  - Viagra.com
  - YouTube: Can You Spot a Fake Video
  - Banner: Can You Spot a Fake?
  - Banner: Ask Your Doctor About Viagra

Note: Primary Actions include: Call toll free number, visit Website, talk to physician, schedule an appointment to talk to physician.

Source: Phoenix Healthcare’s 360 Men’s Health Pilot 2012
At Brand Level: Digital Starts Action

- **Digital channel creative is biggest driver of actions - 42% of action – 58% with Viagra website is included.**
- **The mini-campaign “Can You Spot a Fake” combination banner + YouTube drove 30% of action.**

Viagra Ads/Websites Contribution to Overall Campaign Recall (Campaign Recall = 76%)

- 61% TV ads
- 13% Print ads
- 4% Digital ad
- 4% YouTube
- 2 banners

Viagra Ads/Websites Contribution to Primary Actions (Net Primary Actions = 19%)

- 16%
- 19%
- 12%
- 27%
- 16%

Note: Primary Actions include: Call toll free number, visit Website, talk to physician, schedule an appointment to talk to physician.

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012

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CATEGORY CROSSOVER MEDIA CONSUMPTION IS RAMPANT.

COMPETITION FOR GROWTH IS BETWEEN CATEGORIES THAT CAN DO A BETTER JOB DRIVING MEN TO THE DOCTOR.

HOW CAN BRAND/DSA COMBINATIONS HELP?

LET’S LOOK AT TWO VERY DIFFERENT STRATEGIES.
Two Strategies of Combination Campaigns

*Proportionally polar opposites*

Proportion of Brand to Disease Awareness Spend

- **Abbott AndroGel/Is it Low T?**
  - Low T DSA 6 months before new brand ad started 2009
  - Branded
  - Disease State

- **Takeda Uloric/Think you have gout**
  - Uloric 8 months before Gout DSA started 2011
  - Branded
  - Disease State

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012

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Two Strategies of Combination Campaigns

Proportionally polar opposites  And significantly different spends

Proportion of Brand to Disease Awareness Spend

Source: Phoenix Healthcare ‘s 360° Men’s Health Pilot 2012
Producing Different Results in Brand Exposure Recall

- Uloric achieves near ED-Category level recall, across the patient continuum.

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
And Different Results in DSA Exposure Recall

- Low T reaches 75% of Uloric’s branded ads among those with undiagnosed symptoms providing a comparative 2:1 return on market investment.

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
And Different Results in Boosting Aided Condition Awareness: A Critical Step to Initiating a Physician Discussion

- **More men who just saw the Low T DSA were aware of Low T.**
- **But men who saw both campaigns were 72% more likely to be aware of the condition “Low T” over those who saw no campaign ads.**

![Aided Condition Awareness by Combination of Campaign Exposure](image)

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
And Different Results in Boosting Gout Awareness:

- **In this case the Uloric branded ad performed significantly better than the DSA.**
- **Similar to Low T, men who saw both campaigns were 20% more aware of the condition “gout” over those not exposed to either campaign.**

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
Both Deliver Similar Results on Call to Action

- Both deliver 200+% lift in men who started a discussion with a physician over those who recalled no ad at all.

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
The Whole Picture: The Impact of Cross-Category Media Consumption on Action

- **ED Category achieves largest proportion of branded recall (5 brands), then Gout (3 brands).**
- **Including DSA, the Gout category gains a greater share of media consumption than ED.**

Brand and Unbranded Contribution to Overall Campaign Recall
(Any Campaign Recall = 88%)

- **14%**: Gout DSA: Takeda “Think You Have Gout”
- **26%**: Branded: Gout
- **18%**: Low T DSA: Abbott “Is it Low T”
- **4%**: Branded Low T
- **7%**: Branded BPH
- **31%**: Branded ED

Source: Phoenix Healthcare’s 360° Men’s Health Pilot 2012
The Whole Picture: The Impact of Cross-Condition Media Consumption on Action

- However, condition discussion is disproportionately driven by the combination of Low T DSA and 3 branded campaigns.
- This cross category media consumption effectively diluted ED ROI by 72%.

Source: Phoenix Healthcare ‘s 360° Men’s Health Pilot 2012
What can your brand learn from this?

- This study revealed how reluctant men with undiagnosed symptoms are to seek help. This may apply just as much in your market.
  - Consider ways to understand how men within your category can link their symptoms to a treatable condition -- DSA’s can help.
- Co-mingled co-morbidities is not a Men’s market problem only. Crossover co-morbid conditions with active DTC can and likely do poach your precious target’s attention and dilute your ROI.
  - Consider a cross-category study among the most commonly shared co-morbidities.
- Combination brand + DSA ads can significantly lift essential condition awareness, treatment options, boost physician discussion, and improve your ROI.
  - Ensure your metrics allow you to attribute contribution of each and in combination.
- 21st Century media integrated with traditional multi-media will leverage your outcomes and justify more use of digital, YouTube, QR codes and better branded websites, etc.
  - Make sure you can measure media consumptions that is actually driving physician discussions.
QUESTIONS?

Ask for:
- Brand team presentation with examples of findings
- Information about any of our 11 DTC category audits

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All About the Men: A DTC Battleground of Multiple Conditions & the Opportunities Within

DTC NATIONAL CONFERENCE
April 10 - 12, 2012
SAVE THIS DATE