



The DTC Executive Brief
February / March 2010

Presented to you by



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32 New, Revised Drug Ads Released Over Three-Week Period

(Includes branded, disease education and corporate ads)

Print				
Brand / Condition	Manufacturer	Unit	Date	Source
Advair Diskus	GlaxoSmithKline	2 Pages	02/22	Magazine - Consumer
Cymbalta	Lilly USA	Two Page Spread	03/01	Magazine - Women
DRIVE4 COPD	Boehringer Ingelheim	5.00 x 10.50	02/15	Newspaper
DRIVE4 COPD	Boehringer Ingelheim	6.00 x 10.50	02/14	Newspaper
DRIVE4 COPD	Boehringer Ingelheim	5.00 x 10.50	02/13	Newspaper
DRIVE4 COPD	Boehringer Ingelheim	5.00 x 10.50	02/12	Newspaper
Dysport	Tercica	4 Pages	03/01	Magazine - Consumer
Enbrel	Amgen / Wyeth	3 Pages	02/22	Magazine - Consumer
Lexiva	ViiV Healthcare	3 1/2 Pages	03/01	Magazine - Consumer
Lipitor	Pfizer	6.00 x 9.50	02/14	Newspaper
Osteoporosis	Genentech	Vertical 1/3 Page	03/01	Magazine - Consumer
Zostavax	Merck	5.00 x 21.50	02/09	Newspaper

Radio				
Condition	Mfg.	Unit	Date	Source
Chronic Obstructive Pulmonary Disease (COPD)	Boehringer Ingelheim	60 sec	02/15	Local
Essure	Conceptus	60 sec	02/18	Local
Essure	Conceptus	60 sec	02/15	Local

Television				
Brand / Condition	Manufacturer	Unit	Date	Source
Advair Diskus	GlaxoSmithKline	60 sec	02/15	Local
Chronic Obstructive Pulmonary Disease (COPD)	Boehringer Ingelheim	30 sec	02/14	Network
Chronic Obstructive Pulmonary Disease (COPD)	Boehringer Ingelheim	60 sec	02/14	Network
Diabetes	Merck	60 sec	02/15	Local
Meningococcal Meningitis	Novartis	30 sec	02/14	Local
Mirena	Bayer	75 sec	02/16	Network
Spiriva	Pfizer / Boehringer Ingelheim	60 sec	02/17	Local
Spiriva	Pfizer / Boehringer Ingelheim	60 sec	02/17	Network

Internet				
Brand	Manufacturer	Unit	Date	Source
Crestor	AstraZeneca	GIF	02/08	RxList.com
Flector Patch	King Pharmaceuticals	Flash	02/09	Everyday-Health.com
Flector Patch	King Pharmaceuticals	Flash	02/09	Everyday-Health.com
Humalog	Lilly USA	GIF	02/12	USPharmacist.com
Juvéderm	Allergan	Flash	02/02	LifeScript.com
Nasonex	Schering-Plough	Flash	02/12	new.music.yahoo.com
Postmenopausal Osteoporosis	Amgen	JPEG	02/18	WebMD.com
Premarin	Wyeth	Flash	02/10	YankeeMagazine.com
Pristiq	Wyeth	Flash	02/13	ama-assn.org

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 For more information, please contact Marc Jaffe at mjaffe@vmsinfo.com.

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DDMAC Sees Additional Resources As Means To Improve Enforcement

The numbers tell only part of the story at **DDMAC**. Yes, the number of enforcement letters issued for violative promotional materials rose from 21 letters in 2008 to 41 in 2009. And, the number of letters in 2010 stood at 12 in mid-February. But there's more to the story than just increasing numbers, according to **Tom Abrams**, director of the **Division of Drug Marketing, Advertising and Communications (DDMAC)**. Abrams, speaking at the **DIA** conference on pharmaceutical marketing in

(Continued on page 4)

'Reported' DTC Ad Spending Increases Almost 2% in 2009

After two consecutive years of declining advertising spend for DTC, there was a slight pick-up in ad budgets for consumer Rx marketers in 2009. According to data from market research firms **The Nielsen Co.** and **Kantar Media**, the DTC advertising market rose 1.7% (Kantar) or 1.8% (Nielsen) last year. The slight uptick follows two years when "reported" ad spending fell 3.1% (2007) and 18.4% (2008), and the rise in consumer pharmaceutical advertising also bucks the trend of a decline in the overall advertising market (down roughly 9% in 2009).

(Continued on page 7)



Boehringer Ingelheim has partnered with the COPD Foundation, American Lung Association and NASCAR to launch an aggressive campaign, Drive4COPD. Seven ads featured celebrities who have close family members suffering from bronchitis or emphysema. Two ads for Spiriva, the COPD treatment co-marketed with Pfizer, were also released. This is a multi-year initiative to promote early detection and encourage 1 million Americans to take a five-question screener. For these and other VMS Info listings, see page 2.

(Continued from previous page)

mid-February, noted that additional resources, new monitoring tools and more regulatory options are helping DDMAC do a more effective job at protecting the public health.

“As a result of an FDA enforcement initiative (announced in August 2009), we have streamlined our enforcement efforts and processes, and that has enabled us to stop more misleading promotion and to do so quicker,” Abrams told an audience of legal/regulatory and marketing executives. He also noted, however, that “FDA would prefer to prevent misleading messages than to react [to them]... We are not trying to issue more enforcement letters, but we are trying to look at the marketplace and [encourage] better promotional materials.”

Abrams also emphasized that DDMAC wants the pharmaceutical industry to increase its efforts at voluntarily complying with promotion regulations. “We have to look at this thing differently, and I think we all have to step up to the plate and not play the game, “They’re doing it, so we have to do it to keep up,” he explained. “That hurts everyone here.”

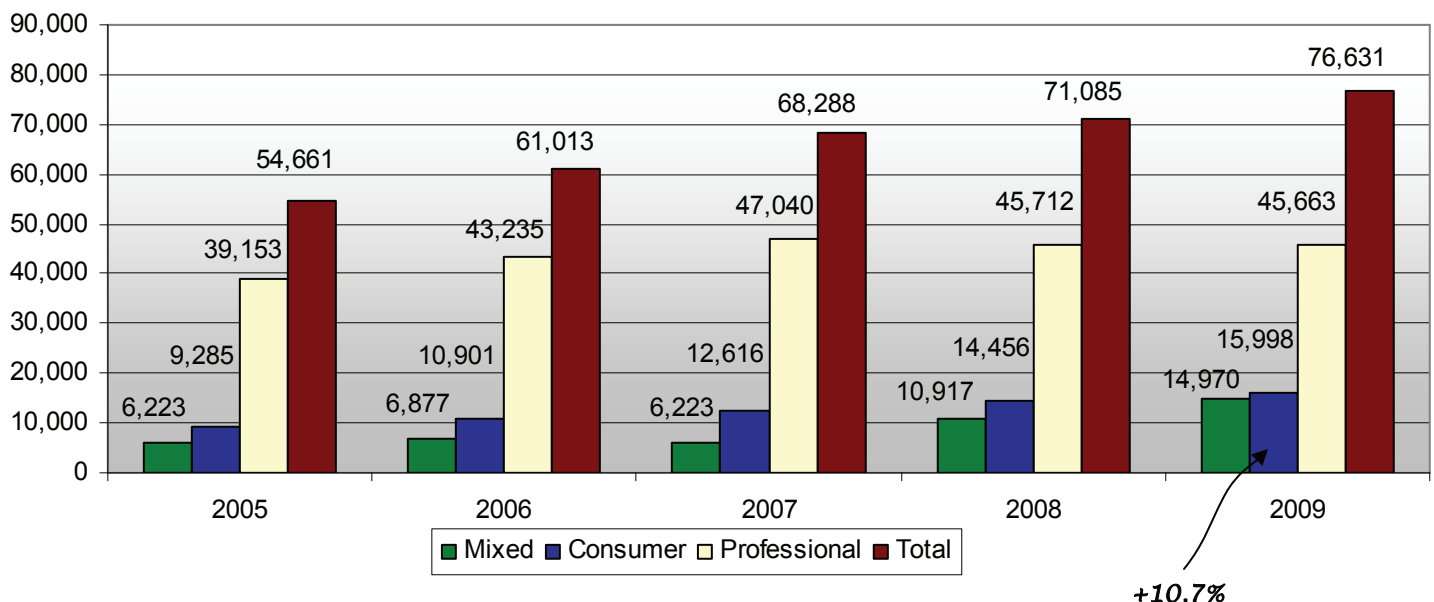
At FDA, one objective is to put more resources into areas that will enhance voluntary compliance, such as guidance development, more timely responses to requests for comment, and educational efforts, Abrams said. “I do strongly believe that we need to look for new ways of increasing voluntary compliance. That is critical here,” he said. “It’s truly in the interest of industry, FDA and the public to have increased voluntary compliance.”

Do not push the envelope

Abrams also admonished marketers to avoid “pushing the envelope,” even in proposed materials. “It really drives me crazy when I see a reviewer write a 10-, 11- or 12-page letter on advisory comments with all of their objections... If I were the reviewer, I would call the company and say, ‘Start over.’ This is not good. It takes our time and it delays the comments back to you. Put a piece together that we can review quickly and that you think is truly compliant. I realize that there may be differences of opinion and that we are going to have comments, but they should not be 10 pages.”

###

Consumer Promotion Climbs 10.7 Percent in 2009



Source: DDMAC, 2010

BenzaClin, Astelin Receive Violation Letters for Point-of-Care Materials

DDMAC enforcement has been on the rise for 2010, with twelve letters issued as of mid-February (as of press time). Among the recent brands to receive notices of violations were **BenzaClin**, for a patient brochure, and **Astelin**, for a waiting room sign.

BenzaClin, an acne vulgaris treatment manufactured by **Sanofi-Aventis**, received an untitled letter for omitting and minimizing risks by failing to properly convey information from both the Precautions and Warnings sections of the PI, thereby suggesting the drug is “safer than has been demonstrated,” DDMAC stated. The brochure also overstated efficacy through claims and images, implying that BenzaClin will clear skin completely. The data shows that participants still suffered from lesions. DDMAC also noted that the brochure included claims about the drug being studied in mild to moderate acne patients; however, it was actually studied in patients suffering from moderate to moderately severe acne.

Meda Pharmaceuticals received an untitled letter for the “**Astelin ‘House Cleaning’ Waiting Room Sign.**” DDMAC noted that the sign broadened the drug’s indication by using the headline: “Allergic

to house cleaning?” According to the violation letter, Astelin is not approved to treat the perennial allergens associated with house cleaning, but rather it is for seasonal allergic rhinitis and vasomotor rhinitis. “While household cleaning products can trigger vasomotor rhinitis symptoms, the overall message of the sign is that Astelin can treat any allergen associated with house cleaning, such as the perennial allergens listed above, when this is not the case,” the letter stated. The sign was also considered misleading because it overstated efficacy, implying that Astelin would resolve symptoms completely. The risk information was not as prominently displayed as its “consumer-friendly claims” were; while some risk information from the Precautions section was omitted, some that was included “is not likely to be understood by consumers,” the letter continued.

The surge in violation letters being issued (24 for consumer promotions alone last year), is part of the agency’s effort to step up overall enforcement and oversight, according to a **Reuters** report. **Tom Abrams**, director of DDMAC, told Reuters, “We’re trying to get the point across to industry that we want them to comply with the law because it affects public health. If you don’t comply with the law, we are going to take action. We are not going to tolerate having consumers or healthcare professionals misled.”

Engage Quality Consumers

We know precisely *when* and *where* to find them.

In pharmacy, in doctors’ offices, in homes and online: MediZine connects DTC brands with millions of the most responsive consumers when health decisions are made.

Put our integrated programs to work for your brand.

Michael Cunnion, President | 212.994.9349, mcunnion@medizine.com

MediZine’s Latest Acquisition!
Healthcommunities.com



MEDIZINE DO WHAT WORKS: ENGAGE EDUCATE INFLUENCE

Proposal to Upgrade DDMAC To 'Office' Status at FDA

Rachel Behrman, director of the FDA's Office of Medical Policy, noted in a presentation at the **DIA** conference on pharmaceutical marketing in late February that FDA is considering a proposal to elevate the Division of Drug Marketing, Advertising and Communications (**DDMAC**) to "office" status. Such a move would give the division "greater visibility within the agency and would correspond with the division's expansion in recent years," according to a report.

The proposed move requires approval by the FDA's Office of the Commissioner. DDMAC would be renamed the Office of Prescription Drug Promotion and it would be separated into two distinct divisions, one to review DTC, or consumer promotion, and a second to oversee promotional materials directed to healthcare professionals. DDMAC would continue to fall under the umbrella of the Office of Medical Policy within the Center for Drug Evaluation and Research (**CDER**).

According to Behrman, the proposed change would take several months to implement, adding the suggested move "does not signal a change in philosophy or attitude" in DDMAC, but rather reflects the importance of the division within the agency and its overall size. DDMAC is "larger than it has been [in recent years], and it is no longer suited to be a division," Behrman said, according to a report on the conference published by Thomson.com. "It also has many functions that do not operate well in a single division," she added.

Speaking earlier at the DIA conference, DDMAC director **Tom Abrams** noted that the DDMAC is expected to add a fourth group for DTC reviews later this year (the third DTC group was added just a year ago) and that four new reviewers are expected to be hired, as well as another social scientist.

###

DTC National Speaker Howard Dean Says Pharma Image Hurt by DTC Ads

Gov. Howard Dean, former chairman of the **Democratic National Committee** (DNC), has been critical of direct-to-consumer advertising the past, but he has a positive view of the pharmaceutical industry overall. Dean, a former governor of Vermont and a keynote speaker at this year's **DTC National Conference** (April 7-9 at the J.W. Marriott in Washington, D.C.) told **DTC INSIGHTS** in an interview that he believes the pharmaceutical industry offers Americans a very good cost / benefit relationship.

"Their products save huge amounts of money to the system as a whole," he noted. But, on the other hand, Dean said he thinks pharma companies have suffered "because they have participated in and made some very bad political decisions over the past 15 years. And I also think that direct-to-consumer advertising harms them in the public's view."

Many marketers recall that Gov. Dean was critical of DTC advertising as a candidate for president in 2004. In explaining how the pharmaceutical industry is hurt by DTC advertising, Dean cited the issues of the cost of this advertising and the public relations aspect of doing consumer promotion.

"I think the public is of two minds [about DTC]," he noted. "DTC is effective, there's no question about that. But it also brings the attention of the public to the fact that [pharma companies] spend a huge amount of money on advertising for products [the public] can't get without going to see a doctor. So essentially what the companies are doing is putting pressure on professionals to alter their prescription habits by trying to influence the patient. ... In general, it's a terrific industry."

Editor's note: A complete report on the interview with Gov. Howard Dean will be published in the March issue of **DTC Perspectives** magazine.

MEDIA

‘Reported’ DTC Ad Spending Increases Almost 2% in 2009

(Continued from page 3)

Thanks to a strong DTC market in the fourth quarter of 2009, the dollar totals for DTC advertising hit \$4.5 billion last year, according to **Nielsen**, and was reported at \$4.7 billion by **Kantar Media**. This is still roughly \$1 billion less than Rx marketers spent on DTC advertising in 2006, when “reported” spending hit its highest level, \$5.5 billion. (Through the first three quarters of 2009, both advertising research firms were tracking a 4% to 5% decline in DTC spending, which was reversed by the uptick in Q4.)

In a sign that the overall advertising market is beginning to turn around, Nielsen reported that ad spending in Q4 fell just 2%. Nielsen senior vice president **Terrie Brennan** noted that the “ad market [is] still trying to stop the bleeding.”

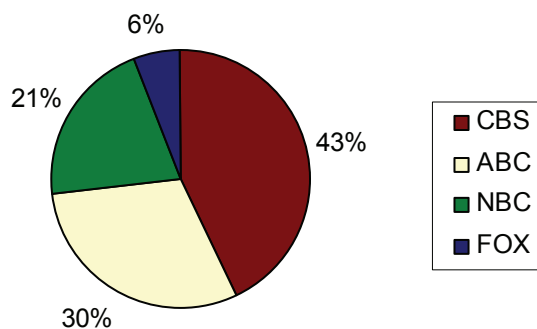
The pharmaceutical industry ranked as the second-largest advertising sector, trailing only the automobile industry in 2009.

Breaking down the “reported” spending by media channel, **network television** continued to rank as the No. 1 medium for DTC marketers, but its share of the overall total slipped to 36%, or \$1.68 billion, according to an analysis of Kantar Media data obtained by *DTC INSIGHTS*. Network television represented roughly 39% of the total DTC spending in 2008. **Cable television** held steady in 2009, capturing \$641 million of the “reported” spending total.

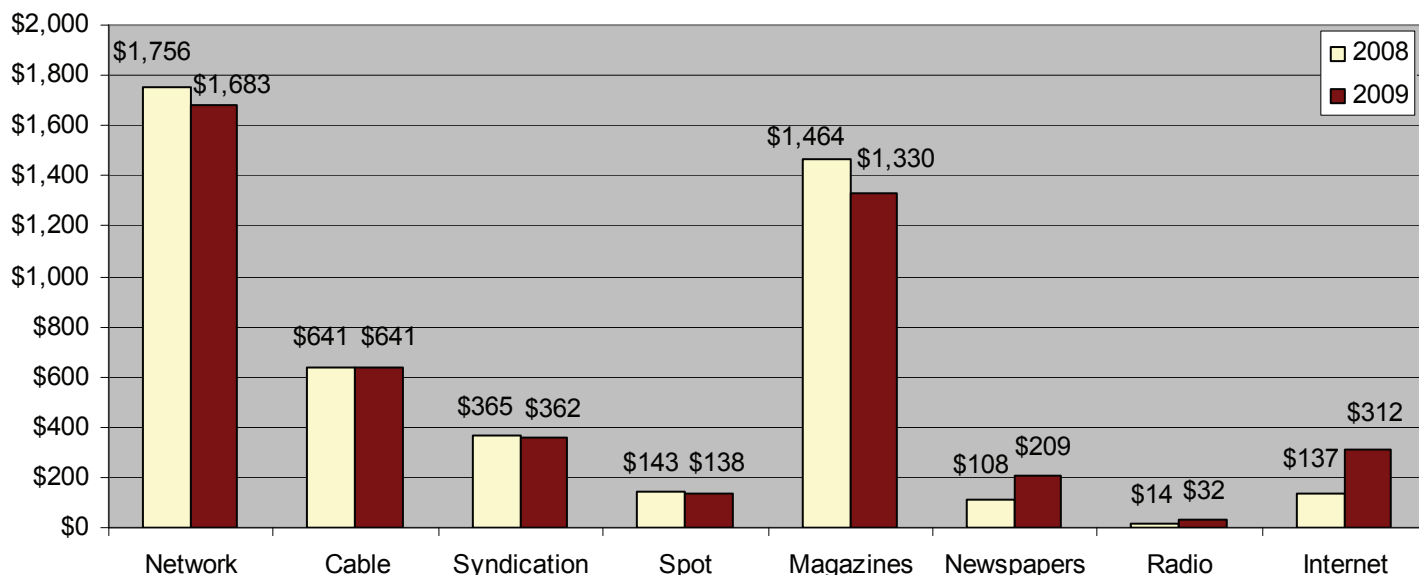
The use of **online** media was a bright spot in 2009, with “reported” spending rising 128% to \$137

(Continued on next page)

CBS’ Share Nearly Half of Network TV Market



Network TV, Magazines Comprise Largest Share of Media Budgets



Source: Kantar Media, 2009; all \$ expressed in millions

million. According to the Kantar Media tally, marketers allocated about 7% of total budget to online tactics (excluding search). DTC advertising in consumer magazines slipped 9.1% to \$1.33 billion, or 28% of the overall DTC market. **Magazines** continued to rank as the No. 2 media choice among DTC marketers. **Newspapers** saw a pick-up in DTC advertising in 2009, and captured \$209 million of the “reported” spending total, which represented 4% of the total.

###

CDD Wants FDA To Investigate Behavioral Targeting Practices

The **Center for Digital Democracy** (CDD) has petitioned the **FDA** to investigate whether pharma companies are using behavioral targeting to market prescription drugs in online campaigns, MediaPost reported. “Digital marketing applications for selling cars, food, and financial products have already raised privacy and related concerns at the FTC. When applied to digital pharmaceutical and health marketing, such practices call for an even higher level of scrutiny and policy intervention,” the watchdog group stated in the filing to FDA.

CDD wants FDA to look at data collection practices of pharma advertisers, review privacy policies of both Rx marketers and publishers, and require companies that use behavioral targeting to indicate their methods. “Consumers need to know whether and how they are being tracked,” the filing stated.

###

MARKETING

Pfizer, Keas Collaborate On ‘Care Plan’ Program

Pfizer is teaming with **Keas**, an interactive service that provides healthcare management platforms

for consumers. The Pfizer / Keas partnership will provide consumers and their physicians with user-friendly and inexpensive “**Care Plans**” to manage their healthcare and information. The objective is to develop plans and related capabilities to engage with consumers. Users can keep track of their health goals and receive medical information through a personalized dashboard. **Olivier Brandicourt**, president and general manager of Pfizer’s primary care business unit, said this relationship “enables us to partner with healthcare professionals to extend care management outside the office.”

According to Keas’ founder and chief executive, **Adam Bosworth**, consumers will have “the tools and knowledge required to live a healthy life,” be better equipped to tackling major healthcare issues and challenges, “and even [schedule] reminders for taking prescriptions or getting lab work done.” Consumers will also be able to share their Care Plan with a designated healthcare provider so that their doctor may follow their progress and “provide collaborative care,” according to a statement.

Leaders in the health and wellness industry will be able “to author, sell and distribute personalized online Care Plans directly to patients,” according to the joint statement. Experts who have previously published other Care Plans include doctors, pharmacists, nutritionists, and health organizations, such as **CVS MinuteClinic, DiabetesMine, Dr. Greene Pediatrics, and HealthWise.**

###

Merck Supporting Patient-Physician Communication Improvement Effort

Merck is teaming up with actress **Andie MacDowell** and **Richard H. Carmona**, a former surgeon general, to highlight the importance of effective communication between patients and healthcare professionals with a new program called, “**Time to Talk**”

CARDIO - Creating A Real Dialogue In the Office.”

Merck is underwriting the program, which is being jointly developed by the **American Academy of Family Physicians (AAFP) Foundation, Canyon Ranch Institute** and **RIASWorks**. MacDowell lost her mother to a heart attack.

The central component of Time to Talk CARDIO is an online “communication tool” that features 550-plus videos demonstrating methods to help make the most of the limited time in a medical visit. The program also offers free educational resources to patients, including patient brochures. To view the Web site for the program, click on www.timetotalkcardio.com.

“While we’ve made great progress in the prevention and management of cardiovascular disease, many patients fail to experience the full benefit from their treatment plans for a variety of reasons,” Dr. Carmona said in a statement. “Time to Talk CARDIO was created to help improve the communication between patients and health care professionals.”

The initial research among 144 patients who used the program showed significant increases in overall use of communication skills and improved overall satisfaction with medical visits. There also is evidence indicated that “empowered patient-provider communication” offers such benefits as improved health outcomes.

###

LAP-BAND Reworks Web site, Print Ad To Be More ‘Relevant’ for Consumers

In an effort to better meet consumers’ needs, **Allergan’s** and **Covidien’s** marketers on the **LAP-BAND AP System** have revamped recent marketing efforts, including the recent launch of a redesign of the Web site www.lapband.com, and have taken a unique layout approach to consumer print ads.

Now, when consumers visit www.lapband.com for the first time, a window pops up notifying them that changes have been made. The redesign is user-friendly, and additional tools and resources are provided. The site also updated the **My LAP-BAND Journey section**. The safety information is also more prominent – running just above the Web site’s menu options in a larger, bolded font. Brief explanations and demos are throughout the site so consumers will know at a glance if those are pages they want to visit.

The My LAP-BAND Journey section is a community offering “personalized support” with some unique interactive tools. Members track their weight loss on a chart, but can also upload photos of themselves and create a “moving collage of [their] progress,” according to the site’s demo. When goals and milestones are reached, the Web site “celebrates” by highlighting the user’s achievements. In addition, members can also receive “cheers,” which are motivational and inspirational messages from friends and relatives about the user’s progress.

In addition, LAP-BAND marketers also have re-configured some print ads. Running in issues of **PARADE Magazine** and several other supplement publications, a print ad for the LAP-BAND AP System is not the standard single, full-page format – one-third of the ad ran along the left side of the left page and the remaining two-thirds ran on the right side of the right page, flanking editorial content. The flexibility of the advertising space allowed the marketers to utilize the “end unit ad” approach to surround a “relevant editorial” piece, an **Allergan marketing director** explained to *DTC INSIGHTS*. Furthermore, because of the fair balance’s adjacency, the ad still conformed with current **FDA regulations**. Marketers were able to take a new and unique approach to better reach consumers, but still remain within existing regulatory guidelines.

###

DTC Dashboard

The DTC Dashboard is a series of charts providing a snapshot of DTC marketing.

DTC Showing Signs of Recovery with Nearly 2% Ad Spend Increase

	2007 ⁺	2008 ⁺	Q1-3 2009	2009 ⁺	2010*	2011*
Total in \$ billions	\$5.33	\$4.42	\$3.24	\$4.50	\$4.34-4.51	\$5.00+
% Change VYA	-4.0%	-17.1%	-4.6%	+1.8%	+1% - +3%	~ +10%

After periods of decline, spending on DTC promotions rebounded slightly in 2009. *DTC INSIGHTS* forecasts another positive year in 2010.

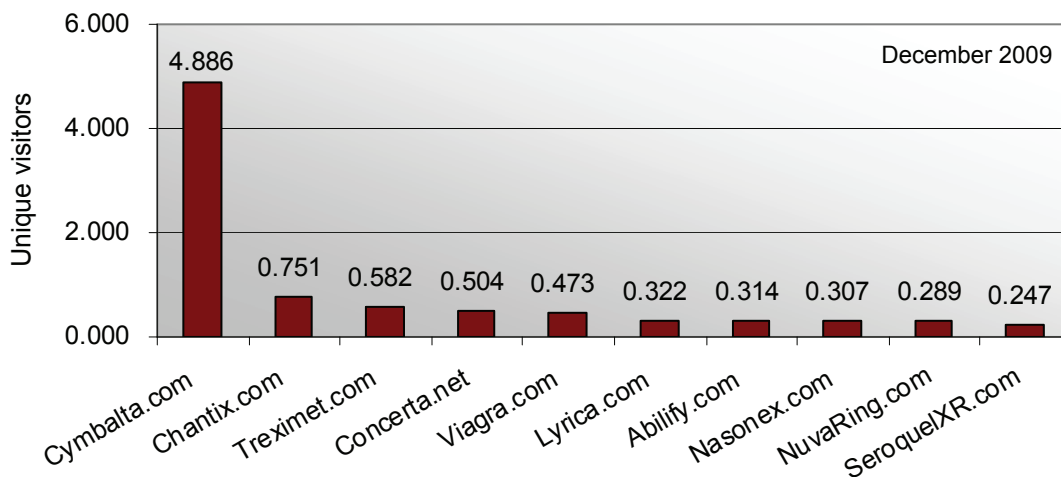
⁺Nielsen revised its previous spending data

*Based on DTC Perspectives' projections

Source: The Nielsen Company, 2010

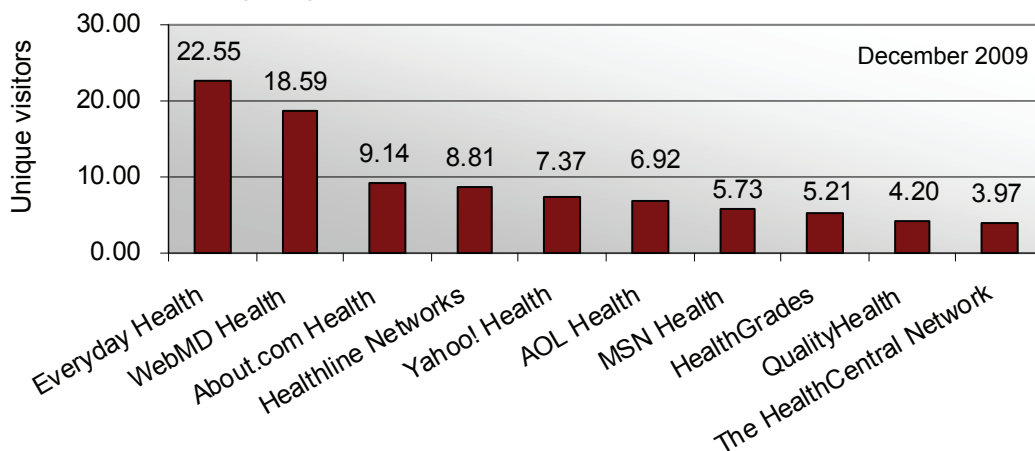
% Change VYA compared with same period of prior year; % differ upon rounding

Cymbalta.com Sees More Than Six Times the Number of Unique Visitors



Cymbalta.com saw nearly 5 million unique visitors, with the average visitor viewing 6.28 pages and spending 3.27 minutes on the site. According to comScore, more than 95% of visitors viewed the depression section, roughly 3% visited fibromyalgia, and the rest viewed information about diabetic nerve pain. An aggressive media campaign referred consumers to the Web site, accounting for 97% of its traffic in the period.

Everyday Health, WebMD Top Sources for Consumer Health Info



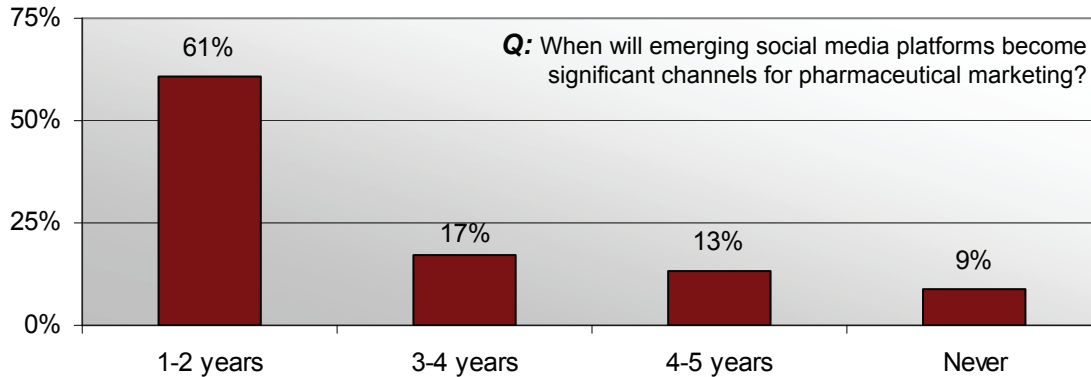
Everyday Health and WebMD saw the highest number of unique visitors in December. Each achieved the highest reach percentages as well - with Everyday Health reaching 11% and WebMD reaching 9% of the total Internet audience.

Source: comScore; Unique visitors in millions, December 2009

SOCIAL MEDIA & DTC MARKETING

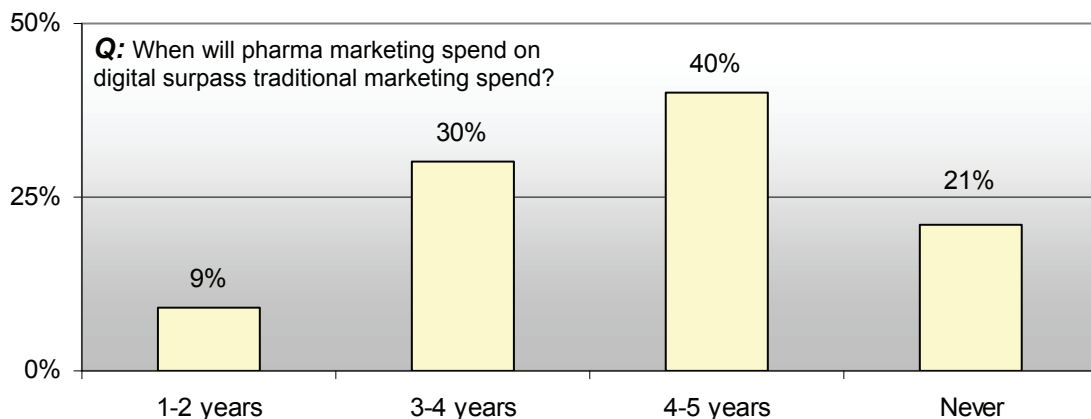
Conducted by Heartbeat Digital among DTC Perspectives' seminar attendees

Emerging Social Media Expected to Play Significant Role in Near Future



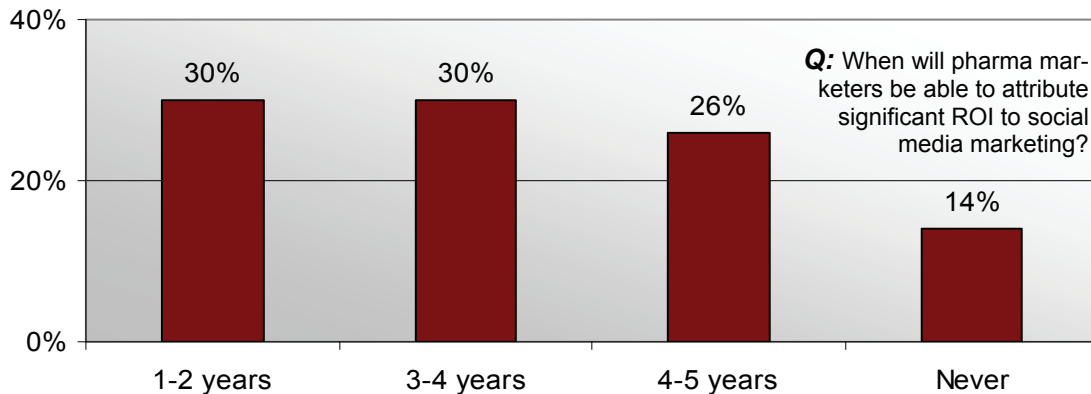
Despite a lack of specific regulatory guidance about social media practices, marketers are putting their concerns aside and predict that emerging social media platforms will become significant channels in the overall marketing plan within the next 1-2 years.

Digital Marketing to Surpass Traditional Marketing, But Not for Few Years



While pharma marketers recognize the importance of social media and that it could surpass spending on traditional marketing at some point, most do not believe it will happen until roughly 2014.

Significant ROI will be Attributable to Social Media in Coming Years



Nearly three-fourths of marketers were almost equally split as to when they will be able to attribute significant ROI to social media marketing. Marketers, for the most part, do believe that it will happen in the next few years.

Source: Conducted by Heartbeat Digital for DTC Perspectives Inc.; Social Media & DTC Marketing Continuing Education Seminar Attendees, n = 35

Pfizer To Increase DTC Ads For Lyrica, Chantix, Lipitor

Pfizer executives noted in mid-February that recent direct-to-consumer efforts have contributed to increased sales of **Lyrica** and that it expects to continue “to defend” sales of its best-selling product **Lipitor** via consumer promotion. Speaking on a conference call with **Wall Street** securities analysts, Pfizer senior vice president **Ian Read** said he believes that the consumer advertising effort was key in helping to boost Lyrica’s performance in the fourth quarter of 2009 (sales of Lyrica rose 7% in Q4 to \$410 million).

“Inside the U.S., we are putting variable spend behind some of the major products that we need to grow through this period, such as Lyrica, where we have seen in the fourth quarter, with that increased DTC spend, good improvements in market share for DPN, PHN and fibromyalgia,” he noted, citing the brand’s indications for diabetic peripheral neuropathy (DPN) and postherpetic neuralgia (PHN). He also indicated that consumer advertising for **Chantix** – which had received only 18 weeks of DTC since it hit the market – would likely be increased, according to a transcript of the call posted online.

“So, we are putting substantial effort behind [Chantix], both in December and in 2010,” Read added. “We can look at other areas of spend. Lipitor, we are continuing to defend Lipitor, where it makes sense to maximize the revenues of Lipitor through its [loss of patent protection]. And even smaller products, such as **Toviaz**, where we now have new data with head-to-head superiority against **Detrol** in two clinical trials. So, we see a lot of opportunity in that segment and we intend to invest behind this new product.”

Pfizer executives also noted in the conference call that the incremental promotional efforts in the U.S., primarily around primary care products such as Lipi-

tor, Lyrica and Chantix, resulted in fourth quarter sales-growth rates improving “sequentially.” In response to a question, Read explained that Pfizer will put DTC efforts “behind products that we believe there is an opportunity for growth, and we intend to invest behind them.” With Chantix, he said Pfizer believes “we need to put sustained support behind it, both from a field force and from DTC, given we now have the label changes over. And targeted support behind Lipitor.”

Lipitor, the world’s best-selling drug, is likely to lose patent protection in 2011. It had U.S. sales of \$5.7 billion last year, a decline of 10%. In the January-September period, Pfizer spending on DTC for Lipitor totaled \$155 million, according to **TNS Media Intelligence** (now **Kantar Media**) data. It was the most heavily advertised Rx drug during this nine-month period.

###

RESEARCH

E&Y Report: Pharma Collaborations With Innovators Crucial for Survival

Pharmaceutical manufacturers are “increasingly looking for innovative ways to collaborate” with companies from a variety of industries, according to a new report from **Ernst & Young**. The expertise that these firms can provide pharmaceutical companies with will help marketers “capitalize on rapid changes taking place in healthcare.”

The report, **Progressions: Pharma 3.0**, noted that nontraditional companies (such as information technology companies, large retailers, and telecommunication firms) are entering the pharmaceutical industry due to several factors, “including health reform, health IT, comparative effectiveness, and the rising confidence in consumer power.” The result is a shifting of focus from “producing new medicines to delivering ‘healthy outcomes.’”

The report noted how pharma has moved from the “vertically integrated blockbuster-driven model” to one of a broadened portfolio, including more targeted medicines. “The entrance of many non-traditional players in Pharma 3.0 will heighten the need for further business model innovation by traditional pharmaceutical companies,” according to an E&Y statement about the report. Developing new commercial models and optimizing relationship with numerous partners will be just as critical for marketers as “the development of innovative new medicines.”

These events create new challenges and make the industry more competitive, but those who can adapt successfully will come out on top. “In this environment, successful companies will find new ways to combine their unique assets and attributes with those of partners through dynamic collaborations focused squarely on patient outcomes and the consumer experience,” said **Carolyn Buck Luce**, the global pharmaceutical sector leader at Ernst & Young.

Consumers are clearly more empowered than ever before, but some of the other concerns for marketers lie with the business side. The report surveyed business development executives from 24 companies, with 75% of the respondents believing “that corporate and deal strategy, offer and market positioning, and due diligence will all be more challenging in Pharma 3.0 alliances.”

While half of respondents also said that they expect deals to be more challenging, an additional 67% said that “they are not well prepared for valuation and modeling potential deals with nontraditional partners.” According to **Patrick Flochel**, the Ernst & Young EMEA life sciences leader, “Innovation is no longer just about the product – it now encompasses how you do business, who you do business with and how you mobilize your resources to contribute to healthy outcomes for patients.”

###

Influence, Usage of Internet for Health Information Grows Among Consumers

The number of **ePharma Consumers** surpassed the 100 million-user mark in 2009, about 44% of U.S. adults, according to **Manhattan Research**. The research firm noted that growth of ePharma Consumers (individuals researching prescription drug information online) is outpacing the growth of **eHealth Consumers** (individuals researching general health and medical information online).

During a recent Manhattan Research Webinar, **Meredith Ressi**, vice president of research, also highlighted that both of those consumer categories are outpacing the overall online growth within the U.S. adult population. The growth can be attributed to several factors. To start with, older generations of the population are becoming increasingly comfortable with using the Internet for research. “Online prescription drug content tends to be particularly relevant to this segment,” stated a Manhattan Research white paper, “**The Online Pharmaceutical Information-Seeking Landscape**.” Furthermore, with belt-tightening, many consumers are searching online for “coupons and free trials for treatments.”

Marketers are integrating online campaigns into traditional DTC promotions more often.

- Manhattan Research report

From a pharmaceutical standpoint, marketers have done a better job integrating their promotional efforts, creating a more rounded media mix. Advertisements, which used to primarily direct consumers to an 800-number or their doctor, are now also pointing consumers in the direction of their Web sites.

For example, among the top 10 product sites in terms of traffic driven by television ads, Manhattan

Research

Research explained how the Internet played a key role. The number one site was **Schering-Plough's NuvaRing**, and according to research, "oral contraceptive users are more likely to be online than the average consumer." **Latisse**, marketed by **Allergan**, was number two on the list, largely due to the fact that the Web site was promoted so "prominently throughout the ad, encouraging interested consumers to go online" for more information and videos. The third most-visited site was for **Cialis** by **Lilly USA**, an erectile dysfunction drug.

While online, nearly one-half of ePharma Consumers viewed health videos during their research. However, they tended "to pull up relevant health video as they look for health information online, rather than going to YouTube or other video search engines to specifically find video content," the report explained. But once these consumers watched videos, nearly 75% of them "went on to do additional research." Ressi told Webinar listeners that this percentage is much higher than for text-based content.

Despite the buzz around social media, editorial health content still has significantly more influence over consumer actions than various forms of social media.

- Monique Levy, senior director of research

Consumers are more interested in videos about health news, condition education or doctor views more so than patient videos. **Monique Levy**, senior director of research, explained that "despite the buzz around social media, editorial health content still has significantly more influence over consumer actions than various forms of social media." Moreover, "healthcare professionals still have the strongest effect on consumer health behavior," added the report.

In terms of calls to action by online content, condition Web sites are "more likely to drive consumers to seek condition or treatment information." Condition

and product sites are "just as effective" in getting consumers to request a prescription from their doctor. Ressi stated, "In today's multi-channel world, marketing initiatives must be designed to work together for optimal results. While the television ad is critical to building awareness, for many products, the Internet is a next stop for learning more before going on to speak to their physician about a product."

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ACNielsen HCI Joins Kantar Health Group

ACNielsen HCI, a healthcare promotion research organization, has joined **Kantar Health's** Marketing Insights practice. ACNielsen HCI's tracking solutions for pharmaceutical campaigns will "augment Kantar Health's portfolio of complementary solutions for pharmaceutical marketers." Kantar Health, a leading healthcare global consulting firm, added that combining the physician panels from both companies will offer "greater research coverage across physician specialties."

Les Leathem, formerly head of the ACNielsen HCI group, has been named senior vice president at Kantar Health and reports to Marketing Insights' group president **John Tapper**.

Tapper noted that Kantar Health's "strong presence in prelaunch branch messaging and positioning" and ACNielsen HCI's knowledge of "post-launch messaging and campaign tracking" will allow pharmaceutical companies the ability to "seamlessly and holistically develop, assess and adjust their brand and communication messaging."

The ACNielsen HCI team will now be branded as Kantar Health. The Kantar Group is a wholly-owned subsidiary of **WPP**. Nielsen transferred its HCI unit to WPP in late 2008.

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ON THE MOVE

Melissa Clark has been named director, consumer media solutions, at **Novartis**. Clark, a Top 25 DTC Marketer in 2008, most recently was a director of integrated consumer marketing for the company's CVM franchise.... Another former Top Marketer, **Nancy Phelan**, has been named executive director, customer and market engagement, at **Pfizer** following Pfizer's acquisition of her former company, **Wyeth**.... **Natalie Rettinger** joined **Bristol-Myers Squibb** as a senior product manager, working on **Plavix**. She most recently was a product manager for **Enbrel** at **Wyeth**....

Angela Federici was named managing director, marketing research, for **Beacon Healthcare Communications'** Strategic Planning & Insights Practice. She was previously senior vice president, pharma practice lead, at **Millward Brown**.... Two former executives at **PreTesting Group**, **Mark Einhorn** and **Vivian Edelberg**, have moved to **MarketView Research Group**. Einhorn leaves his role as EVP at Pretesting, a New Jersey-based firm that evaluates advertising, to become VP of advertising and packaging. He will head up the advertising and research division, focusing on pharmaceutical advertising. Edelberg, formerly the president of Pretesting, joins MarketView as VP of advertising and packaging. PreTesting Group promoted **Daniel Morris** from VP, marketing, to president....

Ignite Health, an **inVentiv Health** company, promoted **Matt Brown** to president. He was previously chief operating officer. **Jackie Herr**, co-founder and former president of Ignite, will be retiring at the end of March. Brown spent nine years at **GSW Worldwide** in various account ser-

vices positions, including SVP, working with clients such as **Eli Lilly**, **Genentech** and **Johnson & Johnson**. Ignite also promoted **Ross Fetterolf** to SVP, brand strategy and channel innovation, and **Sean Vassilaros** to SVP, agency operations and emerging technology....

WCG named **Jeff Yates** as creative director in its New York office. Yates joins from **DraftFCB Healthcare**, where he was VP, associate creative director and launched several products, including **Wellbutrin XL** and **Valtrex**....

Rodale has made a number of recent promotions, including: **Allison Hobson Falkenberry** to associate vice president, brand communications; **Allison Keane** to executive director, **Men's Health / Women's Health**; **Tanja Sullivan** to director, corporate communications; and **Ellie Prezant** to senior manager, marketing communications. **Prevention** promoted **Bethridge Toovell** to director of communications and **Lauren Paul** to the post of manager, communications.

• **Company News**

Merck placed its media account in review in an effort to consolidate chores following its merger with **Schering-Plough**. According to **Adweek**, the incumbents are **DraftFCB**, **Initiative**, **Zenith Media**, and **Havas' MPG**. Merck declined to comment....

Pixels & Pills, a joint service offering by **Zemoga** and **Palio** to assist pharma marketers with digital marketing, launched **The Health Tweeder**, a tool to aggregate Twitter content on various disease states.

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