



The DTC Executive Brief
September 2009

Presented to you by



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23 New / Revised Commercials Air on Television in the Middle of Q3

Product	Manufacturer	Title / Description	Unit	Airdate	Source
Abilify	Bristol-Myers Squibb and Otsuka America	If you're not where you want to be / actor, letterbox	75 sec	08/17	Local
Advair Diskus	GlaxoSmithKline	Grandfather takes kids to the zoo / letterbox	60 sec	09/01	Network
Aricept	Eisai and Pfizer	"Don't Wait" - Woman's mom forgot to cook lasagna	60 sec	09/01	Network
Cialis	Eli Lilly & Co.	"You Can Be Ready" - Couples, she wants to make up, turn in early / letterbox	60 sec	08/17	Local
Enbrel	Amgen and Wyeth	Man plays instrument, woman works in greenhouse	60 sec	08/17	Local
Epiduo	Galderma Laboratories	Tyler camps out in the acne products aisle / Web	60 sec	08/17	Local
Flomax	Boehringer Ingelheim and Astellas	"The 1 Week Difference" - Four men golfing, Ryan hands his club over / letterbox, \$40 off prescription	60 sec	08/17	Local
Flomax	Boehringer Ingelheim and Astellas	"The 1 Week Difference" - Four men ride bikes, men on a boat fishing	60 sec	08/28	Network
Flomax	Boehringer Ingelheim and Astellas	"The 1 Week Difference" - Four men ride bikes, men on a boat fishing / letterbox	60 sec	09/01	Network
Latisse	Allergan	Brook Shields grew longer, fuller darker lashes / actual user	60 sec	09/01	Network
Lyrica	Pfizer	Teacher had chronic pain all over	60 sec	09/07	Local
Nasonex	Schering-Plough	Bee: Woman in flower field / letterbox, FP	30 sec	09/01	Network
NuvaRing	Schering-Plough	Three women are on a couch watching TV	60 sec	08/10	Network
Plan B	Duramed	"Be Calm" - Women wake up and go to the pharmacy	60 sec	09/01	Network
Plavix	Sanofi-Aventis and Bristol-Myers Squibb	Woman at golf course followed by stretcher / Prilosec mention	75 sec	08/30	Network
Plavix	Sanofi-Aventis and Bristol-Myers Squibb	Hospital stretcher follows man / Prilosec mention	75 sec	08/30	Network
Plavix	Sanofi-Aventis and Bristol-Myers Squibb	Daughter tells dad about the risks of P.A.D.	75 sec	08/31	Local
Spiriva	Pfizer and Boehringer Ingelheim	Man at batting cage, on a pedal boat and fishing	60 sec	09/06	Network
Synvisc-One	Genzyme	One to move, ride, bend / female voiceover, contact	60 sec	08/27	Local
Toviaz	Pfizer	Lynn, Erin, and Jill will talk to their doctors today	60 sec	08/10	Network
Toviaz	Pfizer	Nancy and Terri are going to talk to their doctors	60 sec	08/10	Network
Trilipix	Abbott Laboratories	"Get The Picture" - People hold animated pyramids	60 sec	08/17	Local
Viagra	Pfizer	Couple sitting in living room begin to dance / letterbox	60 sec	09/01	Network

Language: English

Date range: Aug. 8 - Sept. 11

Source: VMS Info for DTC Perspectives, Inc.

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

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I N S I G H T S

Inside this Issue

Regulatory / Washington

- FDA revises study of adverse events hotline.....6

Marketing

- Pfizer launches official Twitter page, but cautiously.....7
- Boniva most frequently recalled brand.....10
- Pfizer launches new campaign for Chantix.....11

Dashboard

- Three Pfizer brands among top spending advertisers...8
- Consumers research on Internet before filling an Rx...9

Media

- Nielsen: "Reported" ad spending slips 11.4%.....11
- Survey: Pharma gets 'blame' for healthcare woes.....12
- Digital shaping future of pharma marketing.....13
- Amgen, Stand Up To Cancer launch campaign.....14
- About.com studies online health ads.....15

On the Move

- Zocor-launch marketer joins ad agency.....15
- Lunesta assigns Lowe with creative duties.....15

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Pfizer Response to Draft Guidance Seeks Separate Internet Regulations

In a detailed document of 26 pages, Pfizer responded to the FDA's recent draft guidance on presentation of risk information in prescription drug promotion. While noting that there are "numerous areas in which we agree with the current draft," Pfizer also presented several specific suggestions for improving the FDA's draft, including a request to develop separate guidance to "govern promotion on the Internet."

- "By its nature, the Internet is quite different from traditional television and print media, and these differences should be reflected in FDA's guidance," the company noted in its Aug. 24 submission. "The draft guidance, in footnote 9, simply notes that its use of the term 'promotional materials' refers to 'Internet Web sites.' But the Internet cannot so easily be combined with traditional television and print promotion."

Pfizer also requested revisions in the draft guidance covering the following areas: (1) the assumption that promotional materials can educate patients about all risks, (2) missing risk information, and, among others, (3) presentation of minor risks. It noted that in several instances "the draft guidance inappropriately treats promotional labeling and advertising as one and the same, although they are governed by separate standards."



Flomax launched three new commercials for its "1-Week Difference" campaign. Co-marketed by Boehringer Ingelheim and Astellas, new ads for the enlarged prostate treatment coincide with National Prostate Health Month in September. To see these, and other VMS Info television listings, see the table on the opposing page.

Its recommendation for revising the draft is to have the final document "reflect that not all promotional communications are subject to the same statutory and regulatory requirements. Pfizer supports the application of the materiality standard to all promotional communications, but requests that the final guidance recognize that there is

(Continued on next page)

no ‘fair balance’ requirement, as such, for promotional labeling.”

Two other areas of the draft guidance that Pfizer addressed are “net impression” and “reasonable consumer.” In the draft document, FDA stated that “trained professionals at FDA” will review claims in promotional pieces from the perspective of a “reasonable consumer” – which is similar to the standard used by FTC to review other consumer advertising. The agency also said it would consider the “net impression” of a consumer advertisement, or other promotional materials, to determine whether the piece conveys accurate information about a particular Rx product.

Pfizer said it “agrees in general that DTC promotional materials should be evaluated from the perspective of the ‘reasonable consumer.’ The meaning of ‘net impression’ in the specific context of the draft guidance is, however, unclear, and we believe that the concept of ‘reasonable consumer’ raises potentially tricky issues that should be clarified in the final guidance.”

The company notes, among other factors, that it is “not clear how FDA determines how a reasonable consumer would interpret a particular promotional piece. ... The agency should develop a framework and standards for determining net impression. In no event should the agency seek to impose on manufacturers a general duty to test their promotional materials for complexity or comprehensibility, and we do not understand footnote 22 to establish such testing as a recommendation or requirement across the board.” Pfizer also asks that FDA not declare a promotion “to be false or misleading unless the agency has empirical evidence demonstrating that the communication is in fact false or misleading, rather than based on merely a subjective assertion grounded only in the agency’s more general observations.”

Coalition for Healthcare Communication Also Weighs In

Another comment was submitted by the **Coalition for Healthcare Communication** (CHC), which noted that it has serious concerns about the draft. A chief worry is that the guidance is too broad and imposes numerous requirements that raise questions about a manufacturer’s ability to truthfully communicate information in an ad. According to the comment, “the guidance assumes new authority that reaches far beyond both the law and existing regulations. FDA’s own definitions or applications (as demonstrated in numerous examples throughout the draft guidance) seek to establish sweepingly new authority with the potential for arbitrary and capricious application of the regulations. Under this draft guidance, FDA could potentially justify objecting to any risk disclosure, including the reprinting of the entire package insert. FDA’s description of ‘factors without limits’ provides the basis for unfettered regulation and provides the agency with numerous reasons to object to virtually any advertisement or piece of promotional labeling, regardless of whether it is truthful and meets the statutory test of not being false and misleading.”

The comment also stated that “unless FDA has a clear rationale for why a particular disclosure is misleading, or why in the aggregate, risk disclo-

DTC INSIGHT

** Given the importance of this FDA guidance on risk presentation, it’s not surprising to see the effort the industry has made in seeking revisions to the draft document. (The Coalition for Healthcare Communication also submitted 19 pages of comments on the draft.) Some observers believe the draft guidance calls for substantive changes in the current regulations, and that it would be wise for the FDA to convene an industry group to further discuss some of the issues industry is raising. We would support such a discussion, at which marketers and agencies could more fully address the concerns they have with the draft and to better understand the FDA’s rationale.*

tures are misleading, this section of the draft guidance should be seriously curtailed or qualified.”

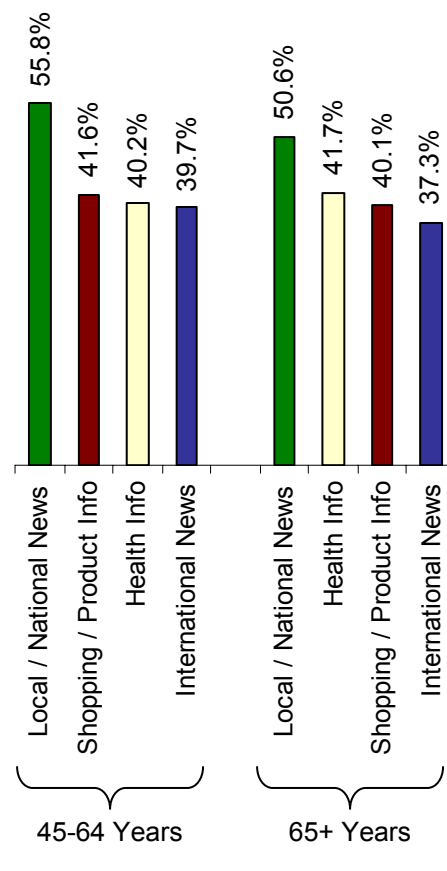
By not fully distinguishing between types of risk disclosure, the guidance also implies that the purpose of risk disclosure is to fully inform patients and doctors of all risks. Requiring additional risk discussions would lead to confusion rather than informing. Fair balance is there to prevent misleading advertising, not to provide full prescribing information. CHC added that “overwarning” consumers and healthcare professionals may create “an inaccurate perception of the product.” Additionally, the guidance does not properly state how a manufacturer can determine “whether the promotional piece is sufficient or insufficient in its disclosure of risk information.” Also, the CHC said it’s particularly concerned that [the benefits and risks] section of the draft guidance can be interpreted to mean that FDA will not accept risk summarization as adequate for fair balance disclosure.”

According to the Web site, www.regulations.gov, 21 entities submitted comments to FDA on the proposed guidance. They include: **Pharma companies:** EDM Serono, AstraZeneca, Biogen Idec, Covidien, Novo Nordisk, Pfizer and Sepracor; **Others:** Academy of Managed Care Pharmacy, AdvaMed, Animal Health Institute, Biotechnology Industry Organization, Competitive Enterprise Institute, Cook Group, Coalition for Healthcare Communication (John Kamp), Magazine Publishers of America, PhRMA, Medical Cognition Laboratory / Duke University (Ruth S. Day), Waterfront Media, and a few individual or anonymous comments.

MORE INFORMATION: View all of the comments for the draft Guidance at <http://www.regulations.gov/search/Regs/home.html#docketDetail?R=FDA-2008-D-0253>.

###

Online Content Actively Sought Out
(by Age Segments and Content Categories)



Source: Burst Media, August 2009
n=1,981; MOE = +/-2.2%.

Engage Patient Communities

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.

Let us prove it—call to learn how.

Suzanne Polizzi, Chief Revenue Officer | 212.695.5582, suzanne@medizine.com

MediZine’s Latest Acquisition!
Healthcommunities.com

MEDIZINE DO WHAT WORKS: ENGAGE EDUCATE INFLUENCE

FDA Revises Study of Adverse Events Hotline

After collecting industry comments and having additional research discussions, the **FDA** has decided to revise a planned study of television ads and adverse event reporting. The FDA has increased the number of participants to 6,000 (up from an original 1,600 participants), as well as modified the design of the study, officially known as the **“Experimental Study: Toll-Free Number for Consumer Reporting of Drug Product Side Effects in Direct-to-Consumer Television Advertisements for Prescription Drugs.”**

The FDA also has to complete the necessary pretesting measures to refine the study’s questionnaire and ensure the believability of the mock television ads for a fictitious high blood pressure treatment. In the study, researchers will examine four variables to see whether the toll-free information facilitates or detracts from the risk information – placement of the toll-free statement, statement language, duration of display, and prominence in the advertisement.

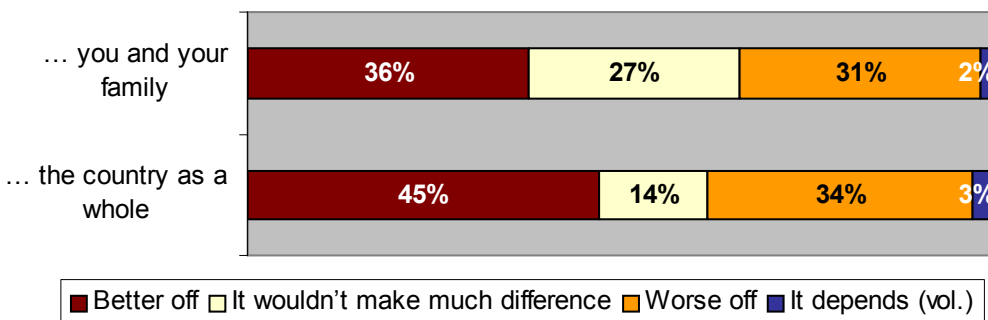
- **Placement** – before, during, or after the risk information statement, or during the entire ad.
- **Language** – two versions will be tested, “*You are encouraged to report negative side effects of prescription drugs to the FDA. Visit www.fda.gov/medwatch, or call 1-800-FDA-1088.*” And, “*Call your doctor for medical advice about side effects. You may report side effects to FDA at 1-800-FDA-1088 or www.fda.gov/medwatch.*” Researchers will determine which wording is more readable and understandable by consumers. If both are deemed acceptable, marketers may be allowed to interchange both versions to help prevent consumers from tuning the language out altogether.
- **Duration** – whether having the statement information on the screen for a short amount of time, longer period or during the whole ad is more beneficial.
- **Prominence** – superimposing the text versus having the text read by a voiceover while the statement remains on the screen.

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** Standardizing risk disclosure in advertisements would help prevent them from being considered misleading, as well as creating a better sense of understanding among consumers since it would be more uniform.*



Q: Do you think (you and your family / the country as a whole) would be better off or worse off if the president and Congress passed health care reform, or don't you think it would make much difference?



Source: Kaiser Family Foundation *Health Tracking Poll*, Aug. 4-11, 2009. Note: Vol. indicates that a response was volunteered by respondent, not an explicitly offered choice. “Don’t know / Refused” responses not shown.

Study participants will view four commercials, two of which are DTC ads. One of the DTC ads will be for the high blood pressure drug and the other for another medical condition. Participants will only be questioned about the high blood pressure treatment, but by viewing ads for two medical conditions, the FDA will “avoid the suggestion that there is something particular about the high blood pressure drug class,” as stated in the docket on the **Federal Register’s Web site**.

MORE INFORMATION: The docket can be found on the Federal Register’s Web site at <http://edocket.access.gpo.gov/2009/pdf/E9-19782.pdf>.

###

Marketing

Pfizer Launches Official Twitter Page, But Cautiously

Pfizer, according to spokesman **Ray Kerins**, is moving ahead cautiously with its recently launched **Twitter** page, **Pfizer_news**. Speaking at the Aug. 31 **Social Communications & Healthcare Conference**, Kerins said because there are no FDA guidelines covering the use of Twitter, it presents “a problem” for drug companies who want to take advantage of this new communication channel. Pfizer will consider tweeting publically disseminated information and use links to refer people to materials that can be found in other places, but will not discuss Rx products.

- “Look, we may never have Twitter pages for products without proper guidance,” noted the vice president, worldwide communications. “There were letters sent out to pharma ... recently about advertising on the Internet. Ok, well in a controlled vehicle like advertising if there’s a challenge, how the hell do you do it in this environment?”

(DTC INSIGHTS viewed an edited video of Kerins’ presentation on a “**3-Minute Ad Age**” report that was posted to the AdAge.com Web site following the event. The segment, “**Pfizer’s Twitter Dilemma**,” included excerpts from Kerins’ speech.)

The key is listening, which is something companies “are trying desperately to do,” Kerins explained to attendees. But Pfizer learned a big lesson shortly after launching about how quickly social media moves. Three days after starting its page, someone asked if it was the real Pfizer. Kerins was in traffic court at the time and unable to check his **BlackBerry**. But during that short period, another person posted a message saying it was not the real Pfizer and for people to block it. “That’s not what you want to hear when you’re trying to engage people,” he said. (Note: Twitter.com/Pfizer is owned by a private individual; Twitter.com/Pfizer_news is the official corporate site.)

Calling Twitter “an opportunity” and “a news feed,” Kerins acknowledged that there is more the company can do on this “channel.” He asked that followers be patient while Pfizer listens to their comments about its progress.

###

DTC INSIGHT

** Pharma is slowly gaining a stronger online presence in social media. However, a lack of FDA guidelines is largely preventing marketers from having a better knowledge of how to properly utilize this medium. Yes, campaigns will take some trial and error to find their optimal path in communicating and engaging with consumers, but not having the much-needed legal guidance will not help ease the learning curve.*

DTC Dashboard

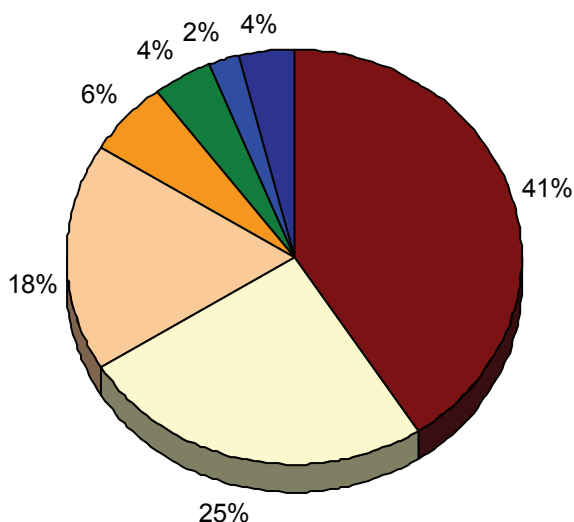
The DTC Dashboard is a series of charts providing a snapshot of DTC marketing.

	2006	2007	2008	1H 2009	2009*	2010*
Total in \$ billions	\$5.55	\$5.38	\$4.34	\$2.14	\$3.95-3.99	\$3.75-3.87
% Change VYA	15.4%	-3.1%	-18.4%	-11.4%	-8% / -9%	-3% / -5%

Source: The Nielsen Company, 2009
% Change VYA compared with same period of prior year

*Based on DTC Perspectives' projections

'Reported' Nielsen Data Shows 11.4% Drop in First-Half Spending



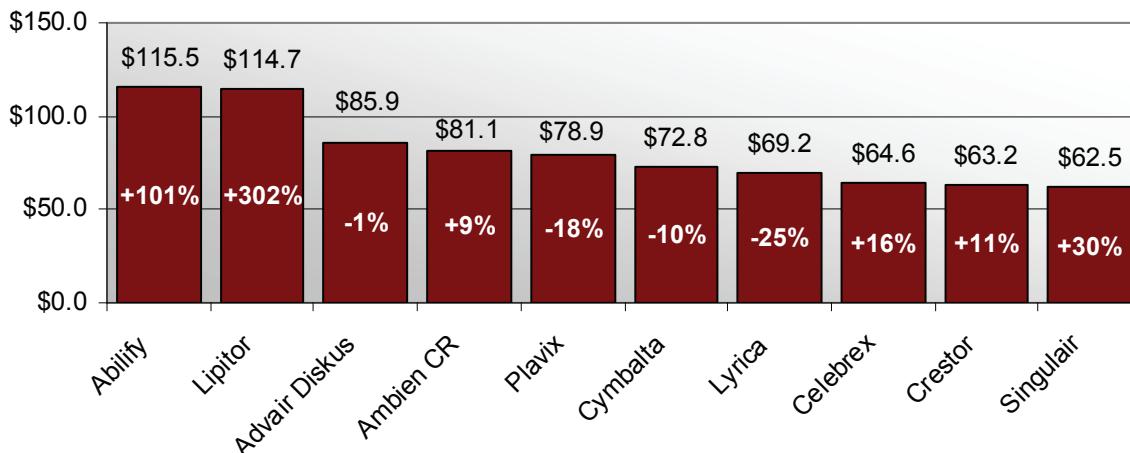
Most media witnessed a decline in ad spend as well, with Internet being the only major medium to see an increase.

Media Type	1H 2008	1H 2009	% Chg
Network TV	\$952.9	\$873.9	-8.3%
National Magazine	\$614.9	\$544.4	-11.5%
Cable TV	\$410.5	\$379.5	-7.6%
Syndicated TV	\$163.3	\$128.5	-21.3%
Spot TV	\$142.9	\$85.7	-40.0%
Internet	\$36.2	\$47.9	32.1%
Other*	\$100.4	\$84.7	-15.6%
Total	\$2,421.2	\$2,144.7	-11.4%

Source: The Nielsen Company

All \$ expressed in millions; *Other includes FSI Coupon, Local Magazine, Local Newspaper, Local Sunday Supplement, National Newspaper, Network Radio, National Sunday Supplement, Spanish Language Cable TV, Spanish Language Network TV, Spot Radio, and Outdoor.

Pfizer's Lipitor, Lyrica, Celebrex Rank Among Top DTC Advertisers

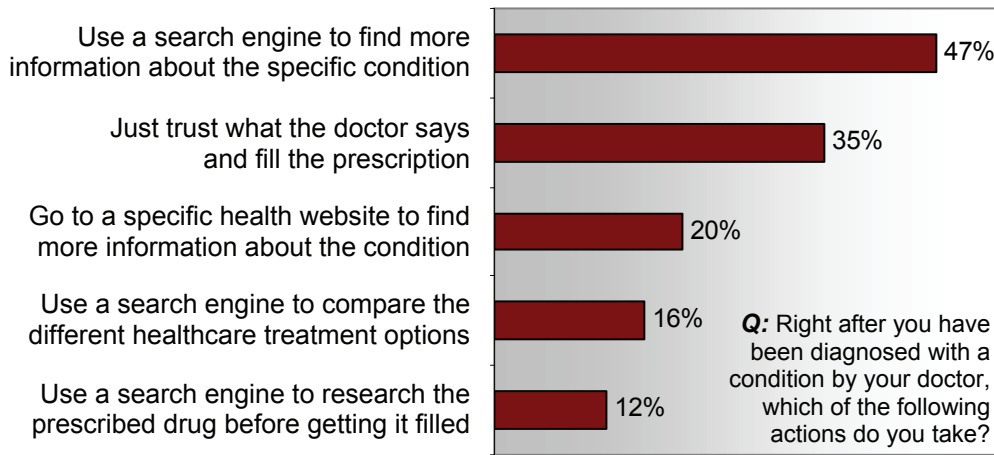


Lipitor and Abilify also had the largest percent increases when compared to the first half of 2008, 302% and 101%, respectively. Lipitor quadrupled its budget (up from \$28.5), whereas Abilify more than doubled its spend (up from \$57.5 million).

Source: The Nielsen Company; All \$ expressed in millions

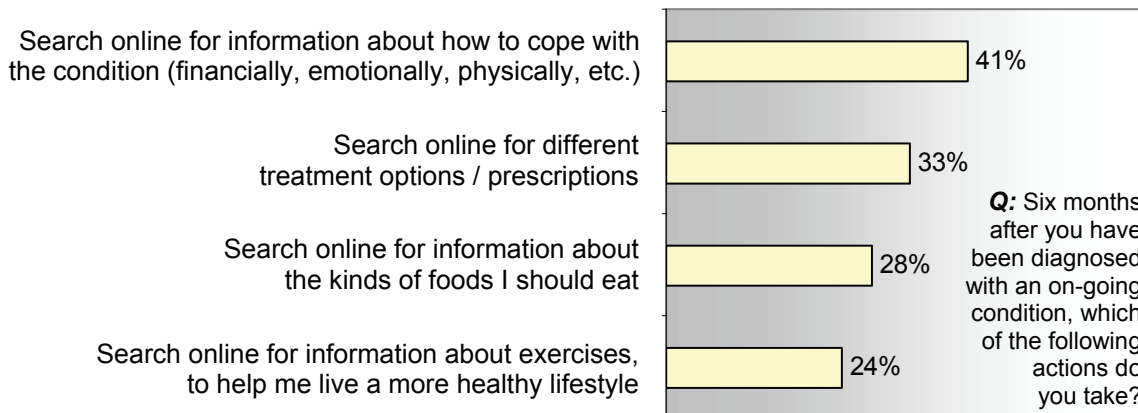
ABOUT.COM'S HEALTH SITE INTERCEPT STUDY

Nearly Half of Consumers Use a Search Engine After Doctor's Diagnosis



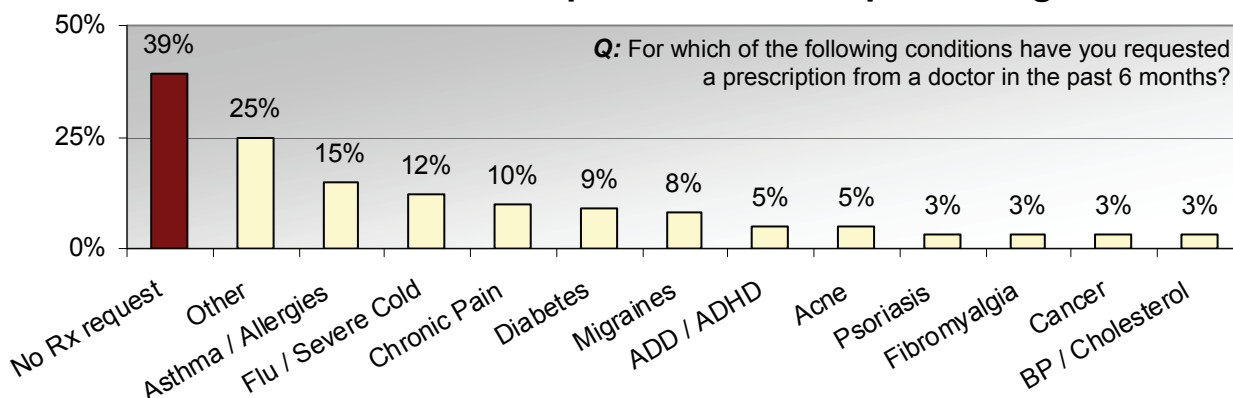
Even though doctors are a top source for health information, About.com discovered that only about one-third of patients fill their prescription as directed without consulting the Internet first.

Consumers Use the Internet to Learn How to Cope with Chronic Conditions



Respondents to About.com's study use the Internet not just for researching information about a condition or product, but also for learning how to cope and live with an on-going condition.

61% of Consumers Requested a Prescription Drug in Past 6 Months



Of the respondents who requested a prescription drug from a doctor, asthma / allergies and flu / severe cold lead the requests.

Source: About.com Health Site Intercept Study, Aug. 2009. Intercept visitors to About.com's Parenting, Food and Health channels; n=1,870.

Boniva Most Frequently Recalled Brand Among 10 Surveyed Osteoporosis Drugs

Roche's and GlaxoSmithKline's marketing campaign for **Boniva** featuring **Sally Field** is the most frequently recalled among osteoporosis treatments by both consumers and doctors, according to a new report from **Decision Resources**. Consumers remembered more of the advertising creative, such as Sally Field playing with grandchildren, while physicians remembered more of the factual details, such as the fact that the actress promoted the brand or that Boniva is available as a once-monthly dose.

The report, "**Brand Perceptions in Osteoporosis**," noted that "40% of patients who have requested a brand, request Boniva from their physicians." Additionally, the authors found that competitor **Actonel** also is among the most-appealing osteoporosis brand messages, but that the brand's promotional value is underestimated due to the high effectiveness of Boniva's campaign. Actonel, co-marketed by **Sanofi-Aventis** and **Procter & Gamble**, is more heavily advertised (32% of promotional spending) than Boniva (30% of promotional spending). However, "surveyed patients estimate that 50% of the promotional materials they have seen in the last month [were] for Boniva and 11% were for Actonel." Doctors estimated the promotional materials at 37% and 15%, respectively. (Note, P&G has agreed to sell its Rx unit to **Warner Chilcott**.)

- "Based on our survey results and analysis, Actonel and Boniva's 2008 overall promotional spend was very similar," said **Dr. Nicole Westphal**, an analyst and product manager at Decision Resources. "However, Roche's success, particularly in the direct-to-consumer space, is probably attributed to the Sally Field promotional campaign. While patients and physicians find Actonel's messages appealing, they frequently attribute Actonel's message to Boniva in brand recall tests. These findings suggest that Actonel's messages are resonating with consumers, but that Sanofi-Aventis / Procter & Gamble need to better differentiate the agent from Boniva in their promotional campaigns."

Actonel outsold Boniva in the U.S. market in 2008. According to **Drugs.com's Top 200 Drugs for 2008**, **Verispan / VONA** reported Actonel's U.S. sales at just under \$715 million and Boniva's at slightly more than \$512 million.

Conducted over a three-day period at the end of June 2009, the study asked about 10 osteoporosis drugs. It surveyed 251 U.S. patients who have been diagnosed with osteoporosis and are receiving treatment, as well as 153 U.S. physicians (77 gynecologists and 76 primary care physicians) who have been practicing a minimum of two years and treated 52 and 71 patients per month, respectively (with the minimum requirement of 10 osteoporosis cases per month).



Boniva's Sally Field campaigns were more recalled than Actonel's advertisements, indicating a stronger resonance with consumers.



Pfizer Launches New Campaign for Chantix

Pfizer in August unveiled a multi-media campaign for **Chantix**, called “Real People, Real Stories,” that features users of Chantix who describe their experiences using the drug to quit smoking. The ads will appear in print, online and on TV. The new campaign follows a recent **FDA** ruling that requires Chantix to carry a “black box warning” for its potential to cause suicidal thoughts among users.

Pfizer also launched an unbranded campaign for smoking cessation called “Life Without Cigarettes.” Both campaigns, created by **Digitas Health**, will run for eight weeks.

Pfizer spokeswoman **Maryrose Lombardo** told **DTC INSIGHTS** that the objective of the campaign is to “inspire smokers to think about making a new quit attempt, think differently about the important role of a quit plan and support, and ultimately, to talk to their healthcare providers to discuss options. We believe raising awareness is beneficial to people who want to quit smoking.” She also noted that the new ads “communicate the most up-to-date safety information so patients and their healthcare providers are aware of important health information to help them make informed decisions.”

The ad agency **mcgarrybowen** won the Chantix account in February and is responsible for working with Pfizer on the brand. However, the “Real People, Real Stories” campaign was in development with Digitas Health before the mcgarrybowen agency came on board, according to Lombardo.

The previous campaign for Chantix, created by **McCann HumanCare**, featured a tortoise and emphasized Chantix as the “pill with a program.” That campaign was used to launch the brand in 2006. U.S. sales of Chantix in the first half of 2009 totaled \$228 million, a decrease of 25% from the year-ago period. TV ads for the “Real People, Real Stories” campaign can be viewed at <http://www.chantix.com/tv-ads.aspx>.

###

Media

Nielsen: ‘Reported’ Ad Spending Slips 11.4%

Marketers of mid-size brands remained cautious in the first half, even as some of the major DTC brands stepped up their consumer marketing efforts. Overall, **Nielsen Company** reported that DTC advertising spend slipped 11.4% to \$2.14 billion in the six-month period ended June 30, a lackluster period for the overall advertising market, as well.

Among the major brands, **Abilify** (marketed by **Bristol-Myers Squibb** and **Otsuka America**) and **Lipitor** (**Pfizer**) increased ad spending by 101% and 302%, respectively. (Note that Lipitor likely reduced DTC advertising in

DTC INSIGHT

* Many Rx brands are now marketed alongside “programs” that complement prescription regimens. Along with providing mere chemical treatment, brands are offering emotional support and advice to deal with conditions. These programs make particular use of the Internet and social media, hosting message boards and providing e-mail alerts.

DTC INSIGHT

* *The silver lining in this cloud is that there is no evidence that new drugs are avoiding DTC as a promotional option. Many new drugs in 2009 have used mass DTC programs to launch. The future of DTC spending will be driven by the number of new drugs approved, rather than a long-term strategic shift out of DTC. As drug companies work with government to hold prices down, they also must make up lost sales by getting higher volume. DTC will be needed to cast a wide net to get new potential users aware of the drug.*

Media

the first half of 2008 at a time when its broadcast ads featuring **Dr. Robert Jarvik** were under scrutiny by critics.) Six of the brands in Nielsen's Top 10 DTC advertiser list had an increase in their ad budgets in the first half. (See Dashboard, page 8, for more details.)

Still, the DTC market fell by double digits, following an equivalent decline in the first quarter and a drop of 18.4% for 2008, according to Nielsen. **DTC INSIGHTS** forecasts a comparable rate of DTC spending in the final half of the year and a moderate decline in ad spending of about 3% to 5% in 2010. DTC advertising should rise again in 2011, and head back toward a \$5 billion annual market by 2012.

Among media channels, the first half was strong for cable television and the Internet. Reported spending via cable declined 7.6% (which was better than the overall market decline) and Internet "reported" spending rose 32% to \$47.9 million (the latter total excludes search).

###

Survey: Pharma Gets 'Blame' for Healthcare Woes

A **Harris Poll** reveals that Americans believe health insurance and pharmaceutical industries deserve "a great deal of blame" for the problems with the healthcare system. The poll, a survey of 2,498 American adults conducted last month, finds that 84% of those surveyed blame pharma for healthcare problems, and more than half (53%) said the industry deserves "a great deal of blame" for these problems. Only 16% of those surveyed believe pharma is without blame. The only other sector that scored higher for "blame" is the insurance industry (90%).

Humphrey Taylor of **Harris Interactive** believes the large percentage of blame placed on pharma is due to the recent healthcare reform debates. "Clearly, neither the health insurance or pharmaceutical industries are particularly popular with the public," he said. "I think the debate over healthcare reform has actually focused more attention on these two industries than had been over the last couple of years."

This survey shows that Americans' attitudes towards pharma have gotten worse since last year. A different Harris Poll, taken yearly, asked Americans whether they think certain industries "do a good or bad job of serving their consumers." The results of this poll reveal that between 2008 and 2009, the pharmaceutical industry has dropped 6 points in public opinion. In another Harris Poll, taken last fall, participants were asked which sector is to blame for the increasing cost of health care. In this poll, only 16% blamed pharmaceutical companies as compared to 41% that blamed insurance companies.

###

Top 20 Magazine Titles in 1H 2009

Title	Circ.	% Chg
AARP the Magazine	24.6	+2.8%
AARP Bulletin	24.3	+0.2%
Reader's Digest	8.2	-3.4%
Better Homes & Gardens	7.6	-0.2%
National Geographic	4.7	-7.0%
Good Housekeeping	4.6	-0.8%
Woman's Day	3.9	+1.5%
Family Circle	3.9	+0.9%
Ladies' Home Journal	3.8	-0.0%
AAA Westways	3.8	+0.3%
People	3.6	-4.9%
Game Informer	3.6	+2.9%
Time	3.4	-0.5%
Prevention	3.3	-0.6%
Taste of Home	3.3	+3.3%
Sports Illustrated	3.3	-0.3%
TV Guide	2.9	-10.4%
Cosmopolitan	2.9	-1.0%
Southern Living	2.8	+1.4%
AAA VIA	2.8	-1.4%

Sources: ABC and TNS Media Intelligence. Average total circulation at leading U.S. consumer magazines for the first half of 2009, among magazines that reported totals to the Audit Bureau Circulation (ABC). Circulation in millions of subscribers. Bold-face names indicate a Top 10 title for DTC advertising.

Digital Shaping Future of Pharma Marketing

A substantial 60% of the U.S. population uses the Internet as a resource for healthcare decisions, according to a new **Manhattan Research** white paper. Beyond researching general health information, “nearly 100 million consumers look up pharmaceutical information online,” stated the report.

The white paper, “**How Digital is Shaping the Future of Pharmaceutical Marketing**,” noted that such trends are “leading to better informed, more empowered patients, and are impacting physician-patient interactions.” Research for the report discovered that more than two-thirds of doctors are in favor of patients bringing in the information they find online. Manhattan Research’s senior director of research, **Monique Levy**, told **DTC INSIGHTS** that this is “one way patients can mitigate against really short consultation times, which are now quite typical. If they have a good sense of the basics around a condition or product, they can dig deeper with their physician.” The report found that this often results in doctors also spending more time with a patient.

Utilizing search engines (cautiously)

Two-thirds of consumers start with search engines when researching health information, noted the report. In addition, consumers are using them “at more points along the treatment continuum,” Levy said. “In 2004 or so, consumers would rush online when something went wrong and look up symptoms. Today, consumers go online to prepare for a doctor’s visit or to evaluate if they should take the pill they’ve already picked up from the pharmacy.”

Since consumers often begin with search engines, this seems a logical place for marketers to reach consumers and direct them to product sites. However, after 14 companies received warning letters from **DDMAC** in March 2009, most marketers are taking “a fairly conservative approach to their paid search advertising campaigns, and now for the most part are separating branded and unbranded copy – either by doing reminder ads or alternately, just featuring condition or indication information and hoping searchers will click through to brand content,” Levy added.

Manhattan Research expects most brands to continue the cautious approach in the near term, but suggested the following to optimize search engine marketing in a regulated environment:

- “First, brands should ensure that their Web sites are optimized for natural search, as our research has shown that overall, consumers are more likely to click on organic listings than their paid search ad counterparts,” Levy explained. “Secondly, search campaigns should be well-integrated in the overall brand campaign. A brand’s SEM campaign should never be isolated from other marketing tactics, as it affects, and is affected by, every other channel. ... Lastly, marketers should keep an eye out for developments from search engines as they work to provide solutions for

DTC INSIGHT

** Marketers also are advised to note, as the Manhattan Research report indicates, that Health 2.0 “is one of the hottest areas of online health,” with an estimated 60 million-plus U.S. adults participating in health-related social media. They are doing this either by consuming this content or by creating it via blogs, message boards or, among other channels, online patient support groups. “Patient online rating and reviewing of doctors, health insurance plans, hospitals and prescription drugs is one of the fastest-growing Health 2.0 activities – and is helping consumers to compare experiences and become more empowered in their personal healthcare decisions.”*

Media

pharma to improve search campaigns within the constraints of FDA regulations.”

Directing consumers to product sites

A product site “can also serve as the hub of a consumer marketing strategy,” as stated by the white paper. “Almost 65 million U.S. adults visited a branded site in 2008. ... Additionally, consumers who visit product sites are nearly three times more likely than the average U.S. adult to request prescriptions by name from their doctors, underscoring the importance of having strategies in place to effectively lead consumers to product Web sites,” Levy said.

The report also recommended that product sites offer consumers loyalty programs and support communities to help them remain compliant and have a positive brand experience, as now more than 75% of consumers “expect’ online customer service from drug companies. ... The pharmaceutical industry is being called on to provide comprehensive healthcare solutions rather than just pills.”

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Amgen, Stand Up To Cancer Launch Campaign

New broadcast and print public service announcements from **Stand Up To Cancer** feature **Edie Falco** and **Cynthia Nixon** (of “The Sopranos” and “Sex & the City” fame, respectively) and debut this fall. The campaign, funded in part by **Amgen**, seeks to educate the public about dealing with cancer and ways to manage the risk of developing cancer. “The campaign’s goal is to encourage cancer patients and their caregivers to actively work with their physicians to learn what can be done to lower the risk of infection before starting chemotherapy,” according to a program statement.

Stand Up To Cancer is a program of the non-profit Entertainment Industry Foundation. Amgen has partnered with the initiative in an effort to “demonstrate that joining forces is essential to fighting and overcoming this disease.” Amgen markets the cancer-related treatments **Neulasta**, **Neupogen** and **Vectibix**.

The campaign, called “Manage Your Treatment,” will run this fall as 30- and 60-second spots and print ads. An Amgen representative noted that the campaign has just launched but Amgen and Stand Up To Cancer are “currently working with several media outlets [mainly major women and lifestyles] magazines, as well as TV” outlets to find unpaid placements for the ads.

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About.com Studies Online Health Ads

When asked about online health advertising, 57% of respondents said they would be interested in either viewing a healthcare-related ad about certain medical conditions or seeing an ad with details on drug safety information, according to **About.com's Health Site Intercept Study**. Breaking the 57% down, almost one-third of respondents (29%) said specific health condition ads would draw their attention, while 28% said the information about a product's side effects and safety would be of interest to them.

When asked about the information provided in pharma ads, 42% answered that they increase their awareness to different treatment options, while 41% of respondents said the ads educated them about symptoms and conditions. A surprisingly low percentage of respondents, 17%, said the ads make it easier for them to speak knowledgeably with their doctor.

Despite the low number of people feeling they could speak knowledgeably with a doctor, 38% of respondents said they spoke with a doctor as a result of seeing a healthcare ad – the number one action taken after seeing a healthcare ad. Searching the Internet came in a close second, with 36% of consumers researching the medication online for more information; 17% spoke to friends and family for recommendations about the drug. Only 13% visited the pharmaceutical-run Web site for a product. Additionally, just a mere 13% asked their doctor for a sample or prescription of the drug.

Findings are based on a survey of 1,870 About.com visitors and looked at online healthcare ads only. About.com is owned by **The New York Times**.

ON THE MOVE

Stonefly Communications Group, an ad agency, named **Karen Langenberg** vice president, medical marketing insights. She was a senior director for medical science at **OSI Eyetech** and spent 18 years at **Merck**, where she helped launch the first large-scale DTC campaign for **Zocor**.....

David Kweskin has joined **The Research Intelligence Group**, a full-service qualitative and quantitative custom market research firm, as senior vice president. Kweskin was senior vice president and practice area leader at **TNS Brand and Communications**, a unit of **TNS Healthcare**.....

Expert Communications Inc. (ECI), a full-service direct marketing agency and a unit of **Omnicom's**

STAR Marketing, named **Robin Raff** director of strategy for its healthcare practice, **ECI Healthcare**..... **Merkle**, a database marketing firm, promoted **Pete Mehr** to chief strategy officer of its healthcare practice. He joined Merkle in 2006 and helped win such accounts as the **American Heart Association** and **Arthritis Foundation**. Earlier, he was director of integrated marketing at **GlaxoSmith-Kline**..... **AbelsonTaylor** promoted **Brandi Homan** to senior copywriter. She will work on a women's health product.

Lunesta has awarded **Lowe**, an **Interpublic Group** agency, with the sleep aid's creative duties. Marketed by **Sepracor**, **Kaplan Thaler Group**, of the **Publicis Groupe**, previously handled the account.

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