

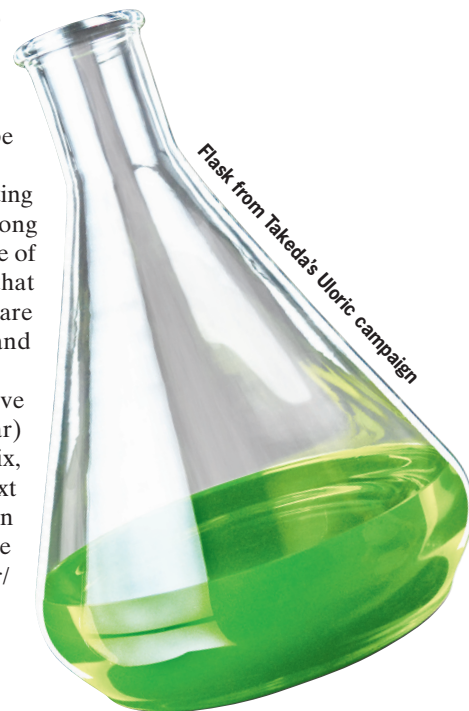
DTC: BEYOND THE BLOCK- BUSTER

The mass-market, TV-and-print DTC formula is going the way of the vanishing primary care blockbusters it was designed to boost as new media and niche products fill the breach, **Matthew Arnold** reports

The prescription drug ads of tomorrow won't interrupt our favorite TV show to suggest that we ask our doctor about some pill to treat a condition we probably don't have, and they won't take us on scenic walks through summer meadows or along pristine beaches. More likely than not, they'll be promoting specialty drugs and biologics indicated for treatment of exactly the diseases we do have. They'll be hyper-targeted and hyper-specific.

The media world is transforming at a blistering pace, with much of the action shifting from TV to Web to mobile and social just in the past few years, and ad spend (along with prices) catching up but still well behind the times. At the same time, the profile of branded drugs is changing with equal rapidity as the mass-market blockbusters that served as the engine of industry revenues for the past decade go off-patent and are replaced by an array of smaller products, including biologics, vaccines, devices and diagnostics.

Of the 20 biggest advertisers among prescription drug brands of 2011, two have already gone off patent, including top-spending Lipitor (\$220 million for the year) and AstraZeneca's Seroquel XR (\$94 million). Bristol-Myers Squibb/Sanofi's Plavix, which spent \$75 million for the 12 months to September, loses patent exclusivity next month. Five years from now, brands that spent \$1.2 billion on measured DTC media in 2011, according to Nielsen data, will have lost patent protection. Almost all of those products will face generic competition, the exceptions being biologics like Pfizer/Amgen's Enbrel and drug-device combos like GlaxoSmithKline's Advair Diskus.





John Miles, Pfizer VP, sales and marketing, Enbrel in the US (left) with Dominique Monnet, Amgen general manager, inflammation business unit

PHOTO: KEVIN LOCK

DTC: BEYOND THE BLOCKBUSTER

There will be new products, of course, to replace those going generic. Consumers will still need to be educated on their conditions and treatment options. Manufacturers will still do much of that through good old-fashioned advertising. But the drugs and biologics coming down the pipeline are very different from the old mass-market, primary care-focused, strictly small-molecule blockbusters of old, and marketing them—to smaller audiences, using smaller budgets—will require a whole new set of tools.

Fortunately, they're set to hit the market just as emerging digital technologies make more precise targeting possible and, compared to buying airtime, more affordable.

Enbrel's example

Enbrel straddles the old and the new in DTC. On the one hand, the Pfizer/Amgen joint venture is a mature mega-blockbuster that's made its makers tens of billions of dollars over the 14 years it's been on the market. On the other, it's a complex biologic injectable, and people with the various immunological disorders it treats are far less numerous than, say, sufferers of seasonal allergies, insomnia or depression.

"What you find here is a much more targeted approach in terms of knowing your customer and how best to communicate to them, via what channels," says Pfizer's John Miles, VP of sales and marketing for Enbrel in the US. "We use a very integrated approach with Enbrel. It's not completely novel—we're using TV and print as you would normally see it—but where we go into the digital space, there are opportunities where we know who our customers are, and we're very specific in types of initiatives, whether it's search or display advertising. We know where our patients and physicians are."

For Enbrel, Pfizer and Amgen are currently running



a campaign rooted in a venerable old tactic—the celebrity sufferer, in this case pro golfer Phil Mickelson, who revealed in 2010 that he had been diagnosed with psoriatic arthritis and prescribed the biologic. The companies launched a campaign featuring Mickelson last November, with AbelsonTaylor handling creative.

"Phil is such an inspiring spokesperson for patients with psoriatic arthritis, and it's a condition that has not received a tremendous amount of press," says Dominique Monnet, VP general manager of the inflammation business unit at Amgen.

Psoriatic arthritis afflicts around one in twenty of the 2% of Americans who suffer from psoriasis. As with other rheumatic conditions, the disease is under-diagnosed and treated, and as with rheumatoid arthritis, early intervention is critical to prevent permanent joint damage.

Enbrel is indicated for five conditions, including psoriatic arthritis, plaque psoriasis, rheumatoid arthritis, juvenile idiopathic arthritis and ankylosing spondylitis. Altogether, rheumatoid diseases affect around 1% of the US population. The joint venture has also recently launched a separate campaign aimed at sufferers of plaque psoriasis. The brand.com bridges all the indications.

"You're dealing with different patients with these indications, so it's important that we really look at the different channels available to

You didn't ask for hepatitis C. But you can find out quickly if your body is responding to treatment.

INCIVEK[®] (telaprevir) tablets

Week 4 is your first step to knowing how you are responding to INCIVEK Triple Therapy.

• Week 4 tests at 4, 12, and 24 weeks will help determine if your treatment is working

• Your healthcare provider will stop treatment if your body is not responding

• These blood tests will show your healthcare provider whether or not your treatment time will be 24 or 48 weeks long

INCIVEK Triple Therapy is INCIVEK, peginterferon alfa, and sofosbuvir.

Talk with your healthcare provider to find out if INCIVEK Triple Therapy is right for you.

QUESTIONS? Call the 24/7 Nurse Support Line at 1-800-3-INCIVEK (1-800-346-2963) or go to www.INCIVEK.com

Common Side Effects of INCIVEK Combination Treatment: The most common side effects include fatigue, nausea, diarrhea, vomiting, and/or loss of appetite. Other side effects include headache, dizziness, and/or loss of taste. Tell your healthcare provider about all the medicines you are taking, including over-the-counter medicines, vitamins, or supplements. Tell your healthcare provider about all the medicines you are taking, including over-the-counter medicines, vitamins, or supplements. Tell your healthcare provider about all the medicines you are taking, including over-the-counter medicines, vitamins, or supplements.

Do not take INCIVEK if you are pregnant or may become pregnant, or if you are a man who has had a sexual partner who is pregnant, or if you are a man who has had a sexual partner who is pregnant.

Do not take INCIVEK if you are taking certain medicines to bring down blood pressure or to treat heart disease. Do not take INCIVEK if you are taking certain medicines to bring down blood pressure or to treat heart disease.

Do not take INCIVEK if you are taking certain medicines to bring down blood pressure or to treat heart disease.

Do you have psoriasis and joint pain?

You may actually have psoriatic arthritis, like Phil.

During the summer of 2010, Phil Mickelson began to experience intense, ongoing joint pain. His rheumatologist diagnosed him with psoriatic arthritis and prescribed ENBREL.

After a few weeks, Phil started to notice the effects and felt a big relief of what had been bothering him for so long.

Up to 30% of psoriasis patients may actually have psoriatic arthritis and are at risk of permanent joint damage.

ENBREL treats both the skin and joint symptoms of psoriatic arthritis. And it can help keep joint damage from getting worse.

If you have skin symptoms and are experiencing ongoing joint pain, take it from Phil and ask your dermatologist about psoriatic arthritis and whether ENBREL may be right for you.

Prescription ENBREL is taken by injection.

In a clinical trial, ENBREL was shown to improve joint symptoms in psoriatic arthritis. And it can help keep joint damage from getting worse. In a clinical trial, ENBREL was shown to improve joint symptoms in psoriatic arthritis. And it can help keep joint damage from getting worse.

ENBREL (etanercept)

ENBREL is a prescription medicine used to treat psoriasis and psoriatic arthritis. It is taken by injection. Tell your healthcare provider about all the medicines you are taking, including over-the-counter medicines, vitamins, or supplements. Tell your healthcare provider about all the medicines you are taking, including over-the-counter medicines, vitamins, or supplements.

Do not take ENBREL if you are pregnant or may become pregnant, or if you are a man who has had a sexual partner who is pregnant, or if you are a man who has had a sexual partner who is pregnant.

Do not take ENBREL if you are taking certain medicines to bring down blood pressure or to treat heart disease. Do not take ENBREL if you are taking certain medicines to bring down blood pressure or to treat heart disease.

Do not take ENBREL if you are taking certain medicines to bring down blood pressure or to treat heart disease.

Branded ads from DTC campaigns for Takeda gout drug Uloric (top), Vertex hepatitis C product Incivek (middle) and Pfizer/Amgen biologic Enbrel

Top 20 companies by DTC spending, 2011

Rank	Company	US DTC media \$ (000s)*	% change vs. prior year
1	Pfizer	\$885,990.7	-2%
2	Eli Lilly	\$445,111.3	6%
3	AstraZeneca	\$340,091.5	-8%
4	GlaxoSmithKline	\$204,932.7	-36%
5	Boehringer Ingelheim	\$190,297.6	135%
6	Merck	\$186,855.6	-17%
7	Abbott Labs	\$182,572.6	39%
8	Allergan	\$158,767.5	-6%
9	Amgen	\$140,915.9	111%
10	Otsuka	\$134,927.7	-14%
11	Takeda	\$112,370.5	71%
12	Novartis	\$100,307.5	52%
13	Bristol-Myers Squibb	\$84,341.9	-16%
14	Sumitomo	\$74,467.4	-12%
15	Novo Nordisk	\$70,289.2	348%
16	Bayer	\$66,130.9	-19%
17	Roche	\$64,223.3	-29%
18	Johnson & Johnson	\$56,150.1	-55%
19	BMS/Sanofi	\$50,100.3	-61%
20	Sanofi	\$45,051.7	-12%

*Total spend comprises broadcast, print, outdoor and B2B, but not digital
Source: Nielsen

Top 20 brands by DTC spending, 2011

Rank	Brand	Company	US DTC media \$ (000s)*	% change vs. prior year
1	Lipitor	Pfizer	\$220,823.6	-12%
2	Cymbalta [†]	Eli Lilly	\$166,165.5	N/A
3	Cialis	Eli Lilly	\$143,765.9	-20%
4	Abilify	BMS	\$131,242.1	0%
5	Viagra	Pfizer	\$127,584.9	23%
6	Celebrex	Pfizer	\$114,218.1	234%
7	Pradaxa	BI	\$108,893.2	N/A
8	Cymbalta ^{††}	Eli Lilly	\$104,231.9	-45%
9	Lyrica	Pfizer	\$103,223.3	4%
10	Enbrel	Pfizer/Amgen	\$99,604.4	163%
11	Pristiq	Pfizer	\$96,332.4	-22%
12	Seroquel XR	AstraZeneca	\$94,139.7	318%
13	Uloric	Takeda	\$93,583.5	143%
14	Advair Diskus	GSK	\$81,959.6	-23%
15	Chantix	Pfizer	\$80,484.3	-20%
16	Spiriva	BI	\$75,213.0	10%
17	Crestor	AstraZeneca	\$61,864.3	-36%
18	Symbicort	BI	\$58,599.6	-7%
19	Boniva	Genentech	\$54,078.7	-36%
20	Vimovo	AstraZeneca	\$53,693.0	162%

*Total spend comprises broadcast, print, outdoor and B2B, but not digital †for pain ††for depression
Source: Nielsen

us and communicate appropriately to them,” says Miles. “So we have a clear direction with rheumatology and a really clear but independent direction with our dermatology approach.”

Niche brands, big plays

J&J’s Janssen Biotech is using aspirational messaging — along with a bit of star power — to promote its Stelara for plaque psoriasis.

“Psoriasis patients suffer from a range of physical, emotional and treatment burdens related to their condition,” says Janssen Biotech’s David Fabbri, director of dermatology marketing, “so our main goal is to instill hope for clearer skin. With that in mind, all our messaging focuses on the idea that they can ‘imagine the possibilities of clearer skin.’”

In addition to branded ads and a website touting its “Stories” testimonials, including that of America’s Next Top Model winner CariDee English, the Stelara team is also running an unbranded education campaign, developed in partnership with the National Psoriasis Foundation, called “Are You Serious?” The effort, which launched at the end of 2010 with a humorous viral video starring comedian and sufferer Jon Lovitz, includes a patient-focused online platform soliciting stories of coping with the disease from patients. Draftfcb Chicago handled creative for the campaign featuring Cari-Dee, while Universal McCann’s J3, Ansible and Razorfish worked on other aspects of the campaign. Tonic Life Communications worked on “Are You Serious?”

Stelara also hosts “Fit in Your Skin,” an online health and wellness

program for psoriasis sufferers led by fitness expert Jackie Warner (Amgen and Pfizer ran unbranded awareness ads early on, “when biologic therapy was new and we really needed to educate patients,” says Pfizer’s Miles, but have since shifted to a strictly branded approach). From Q4 ’11 to Q3 ’12, Stelara spent \$71 million.

Like Stelara, Takeda’s Uloric launched recently. As the first new product for gout on the market in four decades, the Uloric team had some work to do in educating patients about how the disease works and available treatments.

“Our campaign was really focused on targeting patients who were on treatment but were still experiencing flares,” says Heidi Gillmore, marketing director for Uloric. “There was a big awareness gap because of the fact that there’s been no new innovation in the category for decades, and therefore no promotion happening. There was really a lack of credible resources on the Internet.”

While the disease is most often treated by primary care physicians, the market for gout drugs is a niche one, with around eight million adults diagnosed in the US, and just short of three million treated chronically. Because there’s a lot of co-morbidity, the topic often fails to come up during doctor visits, as more immediate health concerns predominate. Around half of those on treatment are still experiencing flares, according to Takeda’s research, which also found poor patient understanding of the role of hyperuricemia, the underlying metabolic condition treated by Uloric, in gout.

“So that fed into our strategy behind doing a really broad-based, multichannel, branded and unbranded campaign to both educate

on the disease state and introduce the brand as an option to these patients,” says Gillmore. Takeda took a two-pronged approach, the unbranded fork being ads that featured a real doctor talking about the role that uric acid plays in gout along with the tagline “Gout can attack silently even between flares.” Branded ads feature patients lugging around a large flask of liquid that serves as a metaphor for uric acid reduction. Both efforts drive viewers to goutinfo.com. The brand is now moving to put more emphasis on relationship marketing.

“Now that we’ve built this awareness level, we’re really trying to drive more dialogue between patients and physicians,” says Gillmore. “So we’re starting to step away from the awareness-building vehicles like the TV ads and center more on the action vehicles—online and in-office media.”

Gout is one of the most-searched conditions, says Gillmore, and Takeda research has shown that four out of five patients searching for gout info online are currently suffering a gout attack.

“They’re having pain and they’re trying to seek out solutions at that time, so we really try and leverage that as much as possible, because that was something we identified at our launch that, because of the lack of innovation in the category, there was a lack of credible resources on the Internet for patients to turn to. So you search on ‘gout’ and you’re getting a lot of home remedies and those types of things.”

Takeda’s Gout.com is the destination for its unbranded efforts, while its Gout Smart program offers interactive discussion guides and other features aimed at getting patients into treatment.

Fine-tuning the consumer channel

Part of what’s opening up the consumer channel to brands with smaller audiences is the availability of tools that facilitate much more precise targeting.

“There’s been an evolution in the tools available and how we approach media,” says Novo Nordisk’s Jeremy Shepler, associate director, marketing. “While zero waste is never going to be something any marketer can achieve, it’s certainly something we can strive for, and what’s being offered today allows us to become much more targeted. I don’t want to say syndicated research is out the door, but things have evolved.”

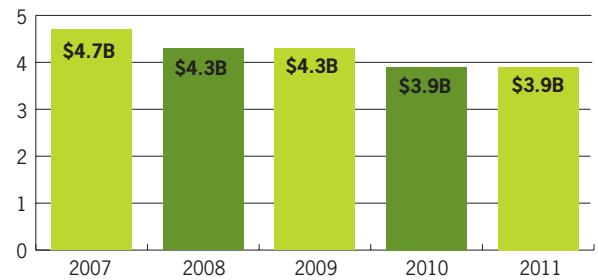
Newer entrants like TRA and Crossix are shaking up the measurement and analytics game, offering advertisers a means of getting closer to their targets. For example, through a partnership with IMS Health, TRA can match its TV set top box data to prescriber-level data telling them what drugs an (anonymized) household is taking.

“That tool is now given to our media agency, which allows them to pick the best mix, whatever it may be, to make sure we’re in front of the people most meaningful to us,” says Shepler. “And on the back end, we can now look at people exposed to our advertising and do ROI-based network-level buys. We can go back and see at what point we lose people and where we have the greatest conversion rate. This is fundamentally different from how media agencies have bought in the past.”

At the same time, so-called demand service providers, or DSPs, operate as virtual auctioneers of media inventory, making instantaneous buys at the lowest price, much as today’s electronic stock exchanges allow for automated trades at light speed.

Health portals are pressing their advantage with innovative targeting technologies. Novo Nordisk likes QualityHealth, which offers

During 2011, DTC ad spend across all media (excluding Web) fell 1%



Source: Nielsen

a pay-for-performance model and targeting by users’ condition, symptoms and product usage.

“Ultimately, with DTC, what people are trying to do is get those consumers to go to the doctor and ask about their brand,” says QualityHealth CEO Rob Rebak, “and the math they’re trying to get back to is the cost-per-brand-request.” For digital, says Rebak, that cost is a quarter of what it would be in a broad-based TV and print campaign.

The cost pressures on advertisers will be all the more intense this year as the Olympics and the presidential election conspire to drive up prices, particularly for TV. Vertex is dispensing with TV ads altogether with its DTC launch of hepatitis C drug Incivek.

“If we were in a highly prevalent disease we would [use TV], because that’s a good way to reach a broad population, but here, the approach is really reaching a more targeted audience,” says Pamela Stephenson, VP, Incivek marketing, at Vertex. For Incivek, Vertex is focusing on digital media—paid search and banner ads—along with print ads “geotargeted” to cities with a high prevalence of the disease.

“Because [hep. C] is a complicated disease, we’ve spent a lot of time researching and talking to patients, trying to understand how to explain the disease and the therapy best suited to them,” says Stephenson. Part of the challenge for Incivek was raising awareness that the virus could be cured. In surveys and focus groups, Vertex found widespread confusion about the definition of “cure” in the context of the category, so they spelled it out (the virus being undetectable in the blood six months after treatment), taking a health literacy approach. “In these highly technical fields, you have to do your homework and spend time with patients,” says Stephenson. “Once we explained it and people understood it, it was highly motivating.”

Vertex also gleaned some important insights into the psychology of the disease. Patients, Stephenson’s team learned, were sick of feeling blamed for having contracted hep. C. The result was the “Fighter campaign,” with creative by Extrovertic and digital by Ignite Health. Creative features images of real patients in martial arts poses and the tagline: “You didn’t ask for hepatitis C.” The message is one of empowerment.

“It’s very authentic,” says Stephenson. “It’s real people standing up to their disease. And it’s very different from other pharma advertising that shows a lot of happy people. When we showed them smiling faces, it didn’t resonate. They said, ‘That’s not me.’” ■