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## UNDERSTANDING DRIVERS OF PATIENT BEHAVIOR TO MAXIMIZE DTC EFFECTIVENESS

By John Mack

In her presentation "Understanding Drivers of Patient Behavior to Maximize DTC Effectiveness," Sue Ramsbacher, Senior Vice President, Portfolio Management, Market Measures/Cozint, summarized results of her firm's 2002 DTC Monitor study.

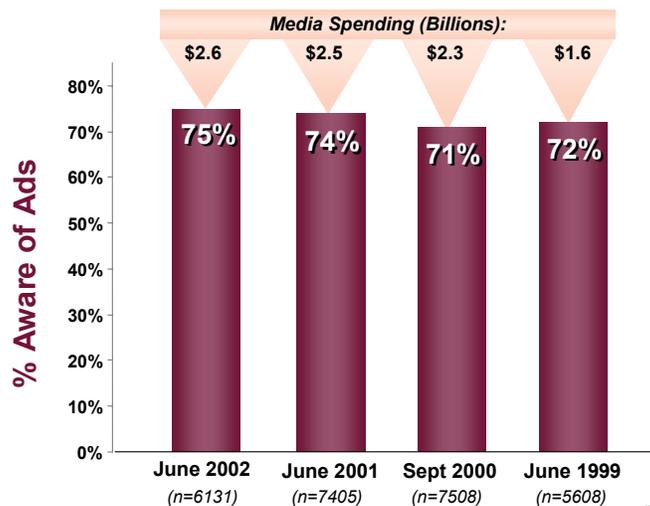
DTC awareness varied considerably depending upon the medium. Awareness of TV DTC ads, for example, was 62%, whereas awareness of DTC ads appearing in magazines was 40%. However, magazine advertising is more efficient considering that

only 29% of each DTC ad dollar is spent on magazine ads. For TV, the percentage is 67%. "TV ads still generate a higher response overall, but in light of the greater efficiency of magazine ads, pharmaceutical marketers may want to reconsider allocation of their media spend," suggested Ramsbacher.

### Perception of Ads and Response

The study also measured perceptions of DTC advertising by consumers and segmented the results

## Advertising Awareness



Source: Competitive Media Reporting

### DTC Awareness

According to the study, in which 6300 consumers completed telephone interviews, DTC awareness, across all disease states, is at a 4-year high. In 2002, with a \$2.6 billion DTC media spend, 75% of sufferers recalled seeing an ad for their condition. This compares to 74% in 2001 and 71% in 2000 (see Figure). In this study, no time frame was imposed regarding when re-call occurred.

### DTC Spending Slowing

Increased awareness appears to come at a time when DTC spending may be slowing (see "Top Companies, Classes, and Products in the DTC Space," PMN, Vol. 2, No. 1, <http://www.pharma-mkting.com/news/pm21-article01.html> ).

DTC spending is also becoming more concentrated in specific categories. During the first half of 2002, the top six DTC categories accounted for 55% of the industry's total DTC investment. Those high-spend categories include allergy (\$260 million), gastrointestinal disorders (\$124 million), high cholesterol (\$109 million), depression (\$101 million), arthritis (\$82 million) and asthma (\$80 million).

according to medical condition. The study asked consumers if they “liked” ads, thought they were believable, and if the ads were informative (provided new information about treating their condition).

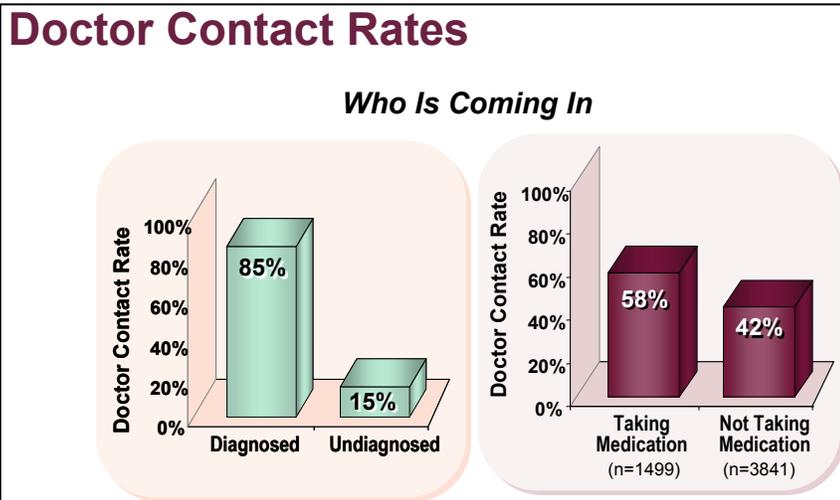
When consumers perceive an ad includes new information, they are much more likely to contact their physicians. Among consumers who said that they learned something new from a DTC ad, 39% contacted their doctors to

were exposed to an Internet drug ad—either the brand site or other sites—contacted their physicians! This contact rate surpasses that for all other sources of ad recall, including TV where the rate was less than half of the Internet rate (i.e., 20%).

Although Ramspacher warned that the Internet data is based on a much smaller sample number than other sources, she suggested that “the Internet is becoming a more effective means of motivating behavior, either alone or in combination with other media.” Internet DTC ads, however, need to reach a larger audience.

It is interesting to note that word-of-mouth endorsements and patient education materials in doctors’ offices and pharmacies—where trusted third-party endorsement may be inferred—are also more important means of motivating consumers to act than is TV ads. These “out-of-the-box” marketing techniques are discussed in greater detail in the

article “Out-of-the-Box Marketing: Does it Work for Pharma?”



discuss the featured medication. In contrast, just 16% of consumers who said that an ad did not provide new facts talked to their doctors about the drug.

Even though doctor contact rates resulting from DTC exposure increased to 22% this year [2002], up from 18% in 2001, DTC is not yet effective in motivating undiagnosed, at-risk populations to visit their doctors. Only 15% of undiagnosed consumers respond to DTC ads by contacting their physicians.

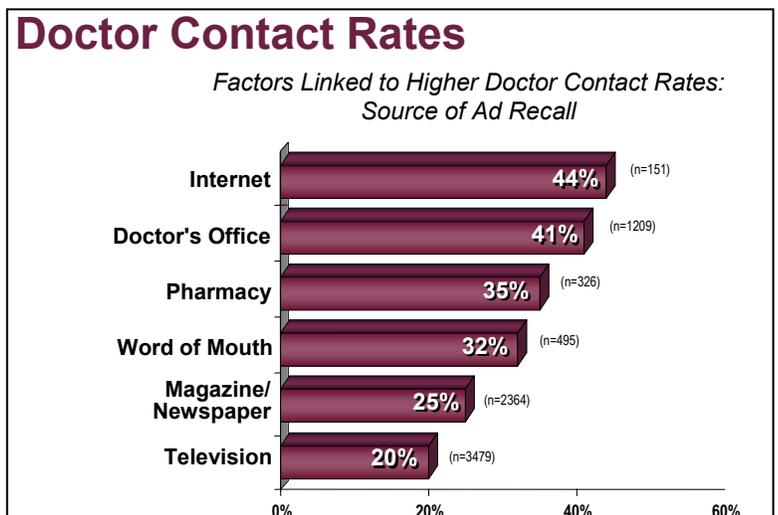
“This represents a tremendous opportunity for pharmaceutical manufacturers, particularly when we consider the huge pool of undiagnosed patients in many major categories,” according to the Cozint DTC Monitor report. “For example, more than 50% of osteoporosis, hyperlipidemia and hypertension sufferers are not yet diagnosed -- and that undiagnosed figure balloons to 67% for depression and 75% for bipolar disorder.”

#### Influence of Ad Source

Doctor contact rates depend upon the source of the ad recall (see Figure). Surprisingly, 44% of consumers who

#### Medication Requests

The percentage of responders (those who contacted their physicians after being exposed to a DTC ad) who requested prescriptions was 41%, which represents a decrease from 47% in 2001 and 50% in 2000. “This declining trend needs to be reversed,” warned Ramspacher, “because patients who request prescriptions are more likely to remain compliant.”



Of those patients requesting prescriptions, 55% received a prescription for the specific brand requested, 19% received a prescription for another brand, and only 26% did not receive a prescription at all. These results compare favorably with FDA's survey of physicians on DTC advertising (see "Results from FDA Physician Survey on DTC Advertising," PMN, Vol. 2, No. 1, <http://www.pharma-mkting.com/news/pmn21-article02.html> ). This study revealed that doctors gave prescriptions 75% of the time to patients who asked for one, and when patients asked for a prescription for a specific drug, the doctor obliged 57% of the time.

### Psychological Factors

Rampacher went on to summarize the result of another study that was designed to explore the psychological factors that drive DTC response.

This study showed that responders differ from non-responders in terms of health-related

behaviors and treatment characteristics. Responders are more likely to have condition and treatment-related concerns (severity of condition, management of symptoms, and satisfaction with medication), are more open to making changes in their lives, feel empowered within the patient-doctor relationship, and are more likely to already be Rx users.

Non-responders, on the other hand, feel less vulnerable about their condition, describe themselves as being more healthy, are more resistant to possible changes, and are less likely to ask for what they want in the doctor's office.

Rampacher suggested that pharmaceutical DTC advertisers should first determine if their intent is to motivate the responder or the non-responder and then tailor and personalize ads to specific target audiences to increase interest and motivation to respond.

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