Service Review

Mapping New Paths through the DTC Marketing Mix Maze
Integrating the Power of Non-Traditional Media
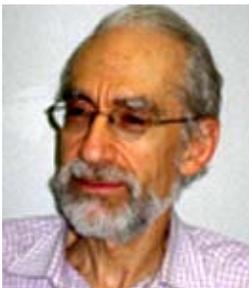
By **John Mack**

On one hand, pharmaceutical marketers allocate a disproportionately larger share of their advertising budgets to broadcast media (TV and radio) than do most other industries—70% versus the overall average of 54% based on 2006 TNS Media Intelligence data. On the other hand, it is a well-known fact that pharmaceutical marketers allocate a much smaller part of their ad budgets to the Internet channel than do most other industries.

The majority of consumers now rely more on the web and word-of-mouth than on traditional media for their health information (see Figure 1, pg. 4). In 2007, 7 of 10 US adults had "ever gone" online and half went online in "last month" for health info.

All this begs the question, are pharmaceutical marketers optimizing their media mix to take advantage of the consumer contact points offered by new and non-traditional media such as blogs, texting, etc.?

Before you can answer that question, you need a methodology to assess all the channels connecting consumers to your brand—comparing the apples to the oranges.

> ### Americans Rely on Internet for Health Information
>
> Half of American adults have searched online for 16 health topics ranging from disease information to smoking cessation strategies. Health seekers go online to become informed, to prepare for appointments and surgery, to share information, and to seek and provide support.
>
> As more Americans come online, more rely on the internet for important health information. Fully 58% of those who found the internet to be crucial or important during a loved one's recent health crisis say the single most important source of information was something they found online.
>
> --PEW Internet and American Life Project

TNS, a world leader in market information, and Integration, a pioneer in measuring the effectiveness of marketing communications, have teamed up to offer new business solutions for brand and advertising management. This includes Market ContactAudit™ (MCA), a system that measures the "value" of a multitude of consumer contacts (or 'brand touch-points) of any nature (traditional media, non-traditional media and non-media). By quantifying how consumers experience brands, MCA enhances the accountability of marketing communications teams and programs.

"For the first time," says Kweskin, "marketers can look across the full spectrum of media—traditional media like radio, TV, print—and have a common way of measuring them against new media like blogs and word of mouth."

Pharmaceutical marketers have to think in terms of all the contact points that occur between a person and a brand. These contact points are endless—conversations with friends, TV ads, overheard at pharmacy, logos on pens seen in doctors' offices, etc.

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David Kweskin

"In today's world we are in a situation where the fragmentation of media keeps on exploding and it becomes very difficult for marketers and media buyers to know where to spend," says David Kweskin, Senior Vice President and Practice Area Leader, Brand and Communications Division, TNS.

> ### New 'Rules' to Building Strong Brands
>
> Fragmentation of traditional media
> - Growing influence of new media
> - Consumers more selective
>
> Different and more contacts / touch-points for consumers to encounter brands
> - Which contacts to use?
> - How to allocate spending?
> - How to optimize contacts?

	1998	1999	2001	2002	2003	2004	2005	2006	2007
	%	%	%	%	%	%	%	%	%
All adults who are online*	38	46	63	66	67	69	74	77	79
All online adults who have ever looked online for health information	71	74	75	80	78	74	72	80	84
All adults who have ever looked online for health information	27	34	47	53	52	51	53	61	71
All adults who have looked online for health information **in last month**	NA	NA	27	32	NA	31	45	51	53
All adults who have ever looked online for health information **+ (millions)**	54	69	97	110	109	111	117	136	160

Figure 1: Use of Internet by US Adults. Source; Harris Interactive. *Includes those online from home, office, school, library or other location; + Based on July 2006 U.S. Census estimate released January 2007 (225,700,000 total U.S. adults aged 18 or over). NA = Not Asked

The TNS approach to doing this is first to determine what are the contact points that do occur and the company goes right to the consumer to find that out.

Content Clout Factor
"For a particular therapeutic category," explains Kweskin, "we ask consumers to evaluate each contact point in terms of what they feel is the accuracy of that information, the overall appeal of the information, and the importance of that information to them."

From these three elements TNS creates a "Content Clout Factor" or CCF for that category. That becomes a weighting element for the category that TNS applies to individual brands within the category.

Figure 2: Measuring the Influence of Each Contact

There is a considerable variability in Clout weights by contact type which will vary from category to category. For the findings in one particular category, see Figure 3 (next page).

"We also need to know what contact points people associate with a brand," says Kweskin. Through a Q&A process—eg, "Select any/all contact points with which you see/hear about the following brands"—TNS determines the degree to which a brand is associated with each contact point such as a print ad or a doctor's recommendation.

Differentiate Through Brand Communication Planning
The next step in the analysis is to look at the four quadrants defined by variation in CCF versus Association of the brand with contact points (see Figure 4, pg. 5). The four quadrants are labeled Battlefield, Ubiquity, Leadership, and Potential.

Battlefield opportunities include contact points that have high influence and are most contested— which might be TV ads. The challenge as marketers in this sector is to differentiate the brand via creativity and excellent execution. "Be careful not to overspend in this area," warns Kweskin, "It can get very competitive."

Leadership opportunities comprise contact points that are least associated with other brands and have a high clout factor (eg,

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Indirect, Mass, Sports/Events are less influential

Figure 3 shows a bar chart titled Contact Influence (Average CCF): One-on-one 78, In-office/In-Store 77, Digital 74, Indirect 61, Mass 52, Sports/Events 45.
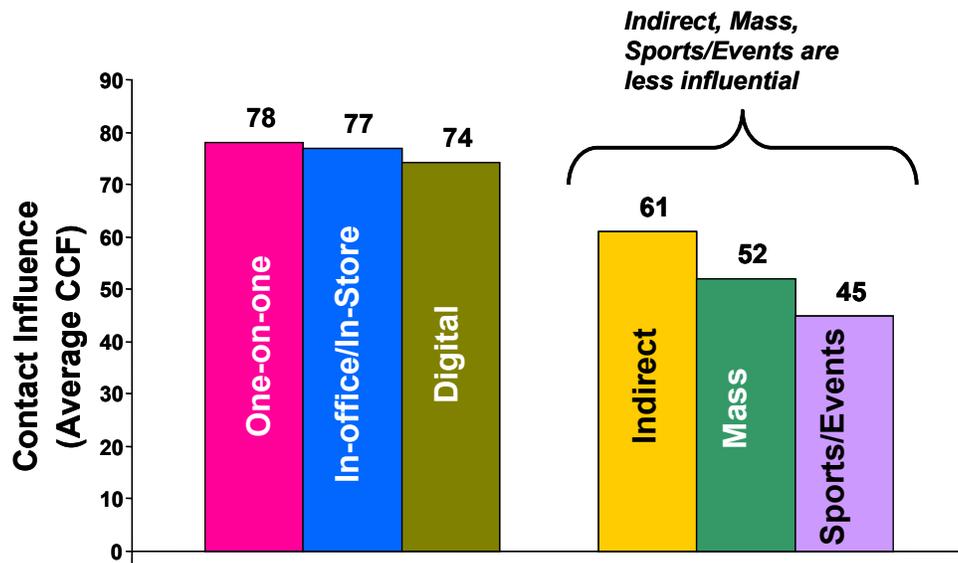
Figure 3: Variability in Clout Weights by Type for One Particular Category.

recommendations from friends/colleagues). "This is the quadrant you really want to be in," says Kweskin. Here the challenge is to build enough reach with a differentiating brand experience.

Ubiquity. The challenge here is to find opportunities that will give us the most differentiation in this area.

The Potential quadrant (which might be direct mail, product placements, or celebrity endorsement, depending on the category) poses the most challenge to marketers. These contact points today have low clout and also low association. "If we can determine what will become the Internet of the future, this is an area to invest in and be most creative as marketers," says Kweskin.

Brand Experience Points and Share

From the Association factor and CCF, TNS calculates "Brand Experience Points" (BEPs), which is the number of brand contact associations weighted by the CCF, or simply CCF X association. "Brand Experience Share" (BES) is a single key indicator for the perceived weight of all brand activities relative to the competition (see Figure 5, next page).

"We have found that these brand experience shares correlate very

well with market share," claims Kweskin. "In non-Rx categories there is generally a correlation of 0.8 or more between BES and market/brand share itself."

The goal for purchased media is to determine what it cost per brand experience point (BEP). This adds another dimension to the usual reach and frequency information for making media purchase decisions.

"By comparing your brand to competitors using this analysis," says Kweskin, "you are able to see what efficiencies do or do not exist in your marketing mix."
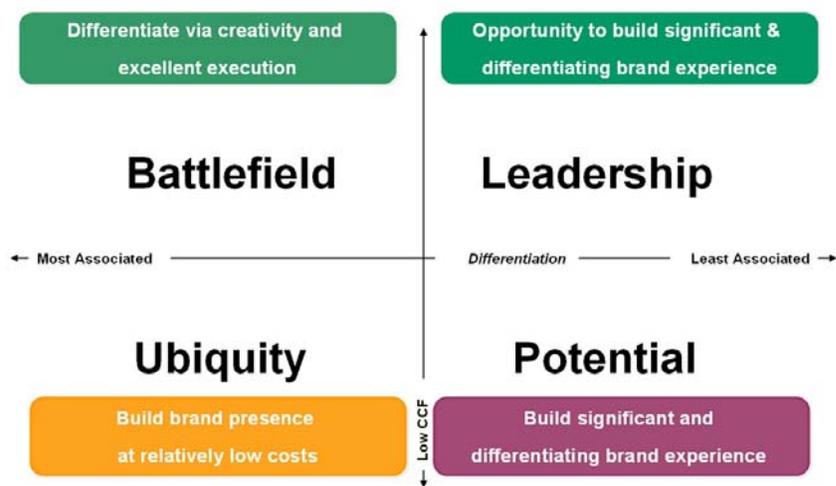
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Figure 4 shows a 2x2 quadrant chart. Top-left: Battlefield — Differentiate via creativity and excellent execution. Top-right: Leadership — Opportunity to build significant & differentiating brand experience. Bottom-left: Ubiquity — Build brand presence at relatively low costs. Bottom-right: Potential — Build significant and differentiating brand experience. Horizontal axis: Most Associated ← Differentiation → Least Associated. Vertical axis: Low CCF.

Figure 4: Communications Opportunities.

Contacts	Associations w/ Brand A	CCF weighting	BEPs Brand A	BEPs Brand B	BEPs Brand C	BEPs Total Category
TV Ad	40%	70	2800	2100	1400	
W.O.M	30%	60	1800	2400	1100	
Magazine Ad	20%	50	1000	2000	1500	
(...)						
Banner Ad	40%	20	800	600	400	
Total BEPs			6,400	8,000	4,100	18,500
BES			35%	43%	22%	100%

CCF = "Contact Clout Factor" is a single indicator for the capacity of contact to influence consumer attitudes towards brands in a given category.

BEP = "Brand Experience Points".
Number of brand contact associations weighted by the CCF.

BES = "Brand Experience Share".
Single indicator for the perceived weight of all brand activities relative to competition.

Figure 5: Key Indicators.

DTC Product Websites

Whatever prominence online contact points are given in your product's marketing mix, it is clear that there must be some form of online DTC information about your product available. We've all seen the numbers: 75% of consumers say the Internet is their first choice to research drug information. Of those that contacted the doctor, 54% also searched online and/or visited a DTC product site.

"The question is," says Morgan Lozier, Director, Web Evaluation Brand and Communications Division, TNS, "what should the online DTC experience look like?" Also:

Morgan Lozier

- How should it function?
- What role should it play?
- How should it be conveyed?

A Shift has Been Noted

There is a recent change from a 'push' paradigm (TV ads) to a 'pull' paradigm (engaging online content). Consumers no longer want to be TOLD what is best for them. They want an online experience that is compelling enough to interact with.

"The 'pull' paradigm creates an opportunity for brands to build deeper relationships with consumers through highly interactive and engaging content," says Lozier. "Many brands are already creating highly compelling interactive experiences online, as seen through the recent proliferation of online video and social networking initiatives."

Survey Says

To find out what makes compelling online DTC product Web sites, TNS did some original research to answer the following questions:

1. Are we correct to assume that sites that are heavy in online video and rich interactive content are more effective than more basic sites that tout 'just the facts?'

2. How do online video and rich interactive content influence the effectiveness of DTC product sites?

3. What elements of DTC sites drive motivation and involvement?

4. What elements of DTC sites drive doctor visits and script requests?

5. How do users interact with DTC online video and does it increase the "stickiness" of the site?
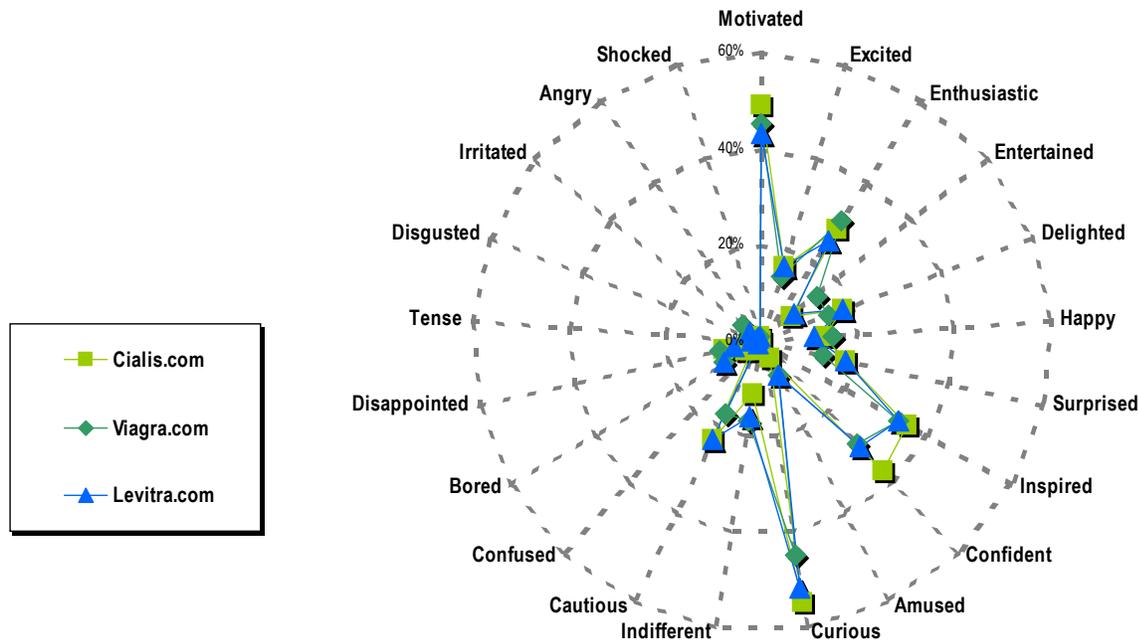
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Figure 6: Feelings While Exploring the Microsite.

Erectile Dysfunction (ED) product Web sites were chosen for the study because they showed a wide variety in usage of online video and rich interactive content.

"We used the TNS panel to identify males that suffer from ED (a mix of those currently taking a prescription and those new to the category)", said Lozier. Participants were asked to explore the site as they would on their own and then return to the survey instrument to provide their feedback. 158 participants viewed Cialis.com; 155 Viagra.com; and 159 Levitra.com.

The survey included four key elements:

1. AdEval™ scale to measure involvement and motivational power of each site—the AdEval™ scale was included because it was believed that product sites and microsites share similar properties and purposes as does offline advertising.

2. WebEval™ questions to evaluate the user experience, navigation, content, etc.

3. Needscope™ projective technique to determine how well each brand and product site meet the emotive needs of the users.

4. WebVisualizer™ was used to record where each user clicked on the site, how long they

spent on the site and how long they spent on each page.

Keys to a Successful DTC Product Web Site
"We determined that there are three keys to creating a successful DTC site," said Lozier. These are:

1. The image portrayed on the site must address user emotional needs and it must be clearly communicated. "This is easier said than done," claimed Lozier."Two of the three sites—Viagra.com and Levitra.com—missed the mark."

2. Video and interactive content must be used effectively. Users appreciate some level of interactive content, but integrated testimonials and video diagrams are more effective than full TV ads. "Cialis.com balanced video and interactive content effectively," said Lozier. "Viagra.com seemed to overdo the use of video. On the home page the Viagra marketers presented just a TV ad, which doesn't seem to work in the online environment. Cialis.com was effective with video testimonials, which helped present information in an effective way without overdoing it. Levitra.com didn't use any video at all."

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3. The most effective DTC sites are those that guide users down a clear path that assists the user in a logical and helpful way (eg, assist the user by including terms like, 'How Cialis Can Help,' instead of 'About Viagra' or 'About Levitra'). "Cialis.com was the most effective doing this," said Lozier.

Some Other Results
Cialis.com performed better than the other two sites in most categories, including: worthwhile experience, involvement, motivation, meeting expectations, value and relevancy (see Figure 6, pg. 7).

All 3 sites performed nearly the same in terms of clarity of presentation, visual appearance, navigation, organization, and value of information.

Cialis.com has the highest proportion of visitors who believe the site meets their expectations of an online experience. (C: 85%; V: 77%; L: 74%)

Compared to Viagra.com visitors, significantly more Cialis.com visitors had a satisfying website experience. (C: 77%; V: 67%; L: 71%)

Cialis.com was the strongest of the three microsites in terms of overall engagement. Contributing to engagement is the ability of the site to leave the site visitor feeling curious, confident, inspired, enthusiastic and ultimately motivated.

Cialis.com is most effective at meeting the emotive needs of the target audience: an effective product (by using quantified claims) that will leave the user feeling confident and perceived as intelligent, all of which go along with taking control of the ED condition

Online Video & Interactive Content
Are sites that are heavy in online video and rich interactive content more effective than more basic sites that tout 'just the facts'?

"There seems to be a need for balance," posits Lozier. "Too much video and rich media content leads to distraction, but too little leads to a lack of involvement. Just the right blend serves to drive motivation and involvement which in turn leads to action."

The type of video and interactive content plays the largest role in "stickiness"— video testimonials and interactive diagrams yield the most engagement. "The Viagra tool for 'Rate Your Sexual Health' also yielded very high 'stickiness,' but it did not correlate to involvement, motivation or action," said Lozier.

"This study was designed to determine of the users that come to a site, how effective is the site in converting them to get a script," said Lozier. "A site like Viagra.com, for example, may get many more visitors than Cialis.com because of familiarity with the brand or other advertising driving visitors to the site, but once they get there, the site was not as effective as its competitor Cialis in motivating users to take action."

Lozier admitted that it would be interesting to do a follow-up with survey participants to see how many actually did see their physicians as opposed to just saying that they will see their physician.

Conclusion
Not only do we need to think in terms of the fragmentation of media, but we need to think about all the potential points of contact that an Rx brand has with patients/potential patients. Marketers have recognized that new media could have great influence but aren't sure how to measure that influence and compare it to traditional media. The partnership between TNS and Integration helps gets them over that hurdle.

Pharma Marketing News

TIP: How to Get Email Notices

If you were a subscriber to the pharma-mkting listserv, you probably remember receiving a daily digest by email of all posts made by listserv subscribers the previous day. Or you may have received an email each time someone posted a message to the listserv.

The new, Web-based **Forums at Pharma Marketing Network** also allow you to get notices by email so that you can integrate the Forum discussions/posts into your daily workflow.

Registered members of the new Forum site can customize their subscriptions to receive instant email notification whenever a post is made to a thread, or daily email notification, or weekly email notification. You do this by clicking the 'Subscribe to this thread' link displayed on the thread page.

You have complete control over your subscriptions and can unsubscribe at any time.

Visit the Forums at:
www.forums.pharma-mkting.com

Experts Consulted

The following experts were consulted in the preparation of articles for this issue.

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- **David Kweskin**, Sr Vice President and Practice Area Leader, Brand and Communications Division TNS, david.kweskin@tns-global.com

- **Morgan Lozier**, Director, Web Evaluation, Brand and Communications Division TNS, morgan.lozier@tns-global.com

- **Manuel Prado**, CEO, datumRx, 415-462-2845, manuel.prado@datumrx.com

Resources

The following resources were used in the preparation of articles for this issue.

- "**Managing the Risks and Regulatory Issues Associated with Successful Pharmaceutical Social Media Monitoring and Marketing**"; http://www.cymfony.com/pharma.asp

- World Health Organization (WHO) report: "**Adherence to Long-Term Therapies**"; http://www.emro.who.int/ncd/Publications/adherence_report.pdf

- "Guidance for Industry: **Postmarketing Adverse Experience Reporting for Human Drug and Licensed Biological Products -- Clarification of What to Report**"; http://www.fda.gov/medwatch/report/guide2.htm

Pharma Marketing News

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