

Managing Lifestyles with Medicines



wrinkles
hair-loss
insomnia
impotence
depression
weight-loss
contraception

Baby boomers with disposable income are searching for the proverbial fountain of youth.

These consumers, and others who have the desire to improve their quality of life, are looking for curative powers from select pharmaceuticals.

Hair loss, too much hair, wrinkles, erectile dysfunction — while unpleasant and, at times, inconvenient — are not life-threatening conditions. Yet pharmaceutical products associated with treating these conditions are growing in popularity and creating a conundrum for the pharmaceutical companies that manufacture and market them.

Although not an official or collective therapeutic class, pharmaceuticals that are used to improve quality of life, as opposed to treating a critical or chronic disease, are referred to as

“lifestyle” drugs or “vanity” drugs. They are used to treat diseases often associated with normal aging. (A report from Business Insights also puts depression and obesity in this group, although these conditions can be life threatening under certain circumstances.)

The lifestyle product market measured by Business Insights will reach \$32 billion by 2008. Another estimate by Deutsche Bank Research predicts sales of lifestyle drugs will rise by 10% each year until 2010 to more than \$40 billion. Deutsche Bank researchers say this sector will grow much faster than the rest of

the global pharmaceutical industry, which is predicted to grow by an average of 5% until the end of the decade.

Some in the industry believe these pharmaceutical products are not being given the due respect they deserve.

“Many of the lifestyle drugs have therapeutic value,” says Ed Wise, president and CEO of Cline, Davis and Mann Inc. “And while it is hard to separate lifestyle and therapeutic value, labeling them as ‘lifestyle’ drugs trivializes these brands when they provide therapeutic benefits to multitudes of patients. Would



There is higher scrutiny from the FDA on lifestyle product promotions compared with products for more life-threatening illnesses.

anyone really say an obesity drug doesn't have therapeutic value? And isn't sexual health tied to a person's overall health?"

The challenge for pharmaceutical marketers is finding the best ways to promote these products given the perception of the industry by the general public as well as the heightened scrutiny by regulators on promotional and advertising materials, particularly those communications directed to consumers.

"In recent months, pharma companies and their agencies have taken what some people would argue is a more 'serious-balanced tone' in their DTC efforts," says David Kweskin, senior VP, practice area leader, advertising and brand performance for TNS Healthcare. "That tone change, in my observation, has equally affected the so-called lifestyle and non-lifestyle drugs. While the inability to perform sex has never killed anyone, it surely has made life miserable for those with ED. For that sufferer, is that a lifestyle problem — implying frivolous — or is it an issue that is fundamentally impacting his relationship with a partner? The variation in how a lifestyle and a non-lifestyle drug is marketed is not particularly remarkable, because, to the end-user of the drug, a lifestyle problem can be almost as serious as other types of medical conditions. From a marketing viewpoint, the key is giving patients the knowledge — and the approval

Chris Wright

ZS Associates



Pharmaceutical companies are spending more carefully and trying to find the right balance between direct-to-consumer and healthcare marketing.

— to approach their doctors about treatments that can make a difference and improve their quality of life."

Shelagh Brooke, executive VP and chief strategic officer at Quantum, agrees that it would be helpful in response to the changing DTC environment to stop talking about "lifestyle" or even "life-enhancing" brands and instead recognize that any condition, no matter how serious, is life altering and impacts the course of a patient's life in some way.

"I would hope to see more promotional creativity brought to bear on the issues of helping patients present their concerns to their physician, facilitating a better dialogue, and doing even more to help patients learn and live the

new story of their lives, no matter what their condition," Ms. Brooke says.

According to Jill Rogers, director of marketing research services for AllPoints Research Inc., the challenge for marketers is to identify the patients who will truly benefit from a product — meaning the drug will have a life-altering effect — and alerting consumers that there are solutions.

"But there needs to be balance without sending the message that all will be resolved with one pill," she says. "At the same time, we do not want to homogenize the nation. We also do not want to cause anxiety where there is none. Finally, with every product there are side effects, and consumers need to be made aware of all the information, yet have an accurate take-away message, to decide if those side effects are worth the solution."

Marketing Strategies

Patrick Angelastro, senior VP of strategic development for ImpactRx, says these are just some of the reasons why lifestyle products are

The Market

The LIFESTYLE PRODUCT MARKET measured by Business Insights will reach \$32 billion by 2008. Researchers break lifestyle products into seven general segments. The largest segment, DEPRESSION, accounted for about \$14.3 billion in 2002 and is expected to reach \$18.3 billion by 2008. The global market for SEXUAL DYSFUNCTION was valued at about \$1.8 billion in 2002 and is forecast to increase to almost \$5 billion in 2008. This growth is attributed, in part, to an expanding patient pool, since fewer than 20% of men affected by erectile dysfunction seek treatment.

Another estimate by Deutsche Bank Research from a 2003 report predicts SALES OF LIFESTYLE DRUGS will increase by 10% each year until 2010, reaching more than \$40 billion. Deutsche Bank researchers say this sector will grow much faster than the REST OF THE GLOBAL PHARMACEUTICAL INDUSTRY, which is predicted to grow by an average rate of 5% until the end of the decade.

ANTIWRINKLE TREATMENTS, WEIGHT-LOSS DRUGS, and IMPOTENCE TREATMENTS should post increases between 10% and almost 30% annually until 2010, and ANTI-DEPRESSANTS, HAIR-LOSS TREATMENTS, and CONTRACEPTIVES are forecast to increase between 5% and 10%.



Paul LeVine

InfoMedics



The future of lifestyle product promotion will rely more on technology, which will allow feedback to the physicians on patient outcomes.

more dynamic in terms of marketing than other products.

“Newly diagnosed and switched patients account for a much larger proportion of these markets, so they’re more promotionally sensitive,” he says. “There’s a lot of churn in these markets. The patients won through your detailing, sampling, and DTC investments are only with you for a short period of time.”

According to Robert Goldberg, Ph.D., VP and director of programs of the Center for Medicine in the Public Interest, pharmaceutical companies are changing their marketing strategies for lifestyle products.

“More public-service initiatives will be coming in the future,” he says. “There will be more diversified, more targeted programs that address specific demographic groups. There will be more Web-based programs. The bottom line is that there will be less mass marketing and more targeted messaging.”

Kristin Patton, senior VP of strategic services for HealthEd, concurs and adds that consumer-focused marketing in many disease states already is becoming more informative in nature.

“But there is a difference between informing and educating patients when it comes to retaining and comprehending,” she says. “There are still significant opportunities for

Jill Rogers

AllPoints Research



With lifestyle products we need to ensure that the ads are appropriate and promoted based on the right research.

Ed Wise

Cline, Davis & Mann



While it is hard to separate lifestyle and therapeutic value, labeling some brands as ‘lifestyle’ drugs trivializes them when they provide therapeutic benefits to multitudes of patients.

healthcare providers. Furthermore, she says, effective methods include infusing healthcare communications with greater doses of creativity based on consumer insights.

“Many of these approaches work,” she says. “They not only help consumers seek solutions to ‘lifestyle’ conditions but also help identify other health-related issues, by virtue of having more patients initiate a dialogue

with their physicians. On the negative side, in the past these approaches also acted as a lightning rod for those who are concerned that DTC has a negative impact on the patient/physician relationship and believe it causes more patients to ask for — and get — drugs they don’t necessarily need.”

The underlying DTC message for a “non-lifestyle” drug, be it for cholesterol or asthma, according to Mr. Kweskin, is that the sufferer can take action to ensure continued health and to enjoy life’s offerings as a normal, contented individual.

“The so-called lifestyle drug should deliver the same basic message of finding a more enjoyable, normal life,” he says.

Mr. Wise says DTC can be a very personal,

companies to develop and deliver education more effectively.”

Ms. Patton says programs will expand beyond being brand-centric and will be more thorough in discussing lifestyle changes.

“Promotions will be a ‘pill and a plan’ instead of just instructing patients to take a pill and providing basic dosing or compliance information,” she says. “So there will be a content shift. There will also be a channel change; instead of a 30-second TV ad on a national, prime-time show, there will be more targeted ads on nonsyndicated shows and on PCs when the target audience is available and captive.”

Ms. Brooke says the goal should be to help patients overcome their reluctance to discuss health issues with their physicians or other

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David Kweskin

TNS



Lifestyle style drugs have not had an enormous impact on pharmaceutical marketing practices. The real sea-change that has occurred in pharma marketing practices is, of course the advent of DTC advertising itself.

very responsible, and very relevant way to communicate with consumers, either through messaging at a physician's office or when someone requests information about a product.

Furthermore, Mr. Wise says it's critical that marketing programs help bridge the dialogue gap between the patient and the physician.

"Physicians are not taught to have these types of conversations," he says. "Marketing programs for these products should include giving physicians the right tools to have dialogues with patients about overall health issues."

Even as pharmaceutical companies continue to re-examine their spending strategies, Chris Wright, managing principal and practice area leader for the U.S. pharmaceuticals practice at ZS Associates says they are trying to find the right balance between direct-to-consumer and healthcare marketing and looking at cost-effective strategies and new styles.

"If a brand is not a market leader, then DTC advertising will not be as effective," Mr. Wright says.

Dr. Goldberg says more public-service types of programs will be coming in the future.

Dr. Goldberg believes the consumer will have a hand in how changes are implemented, and says there will be less hard selling to physicians with more offers directed to consumers through coupons, money-back offers, and gifts.

"Patients are paying out of pocket, so they want more bang for their buck," he says.

Paul LeVine, VP of analytic services at InfoMedics, believes that doctors will have an influence in how promotions will be formulated.

"Physicians are spread too thin with their time," Mr. LeVine says. "The future of lifestyle product promotion will rely more on technology, which will allow feedback to the physicians on patient outcomes."

Market research will become even more important, Ms. Rogers says.

"With the recent guidelines put forth by PhRMA, there will be more need for market

research to make sure standards are met while capturing the appropriate market for a particular lifestyle product," she says.

In addition to attracting, attaining, and retaining patients, marketers have to address the issue of health literacy in their marketing and advertising materials.

"The reading level in the United States, as it relates to health literacy, is overestimated," Ms. Patton says. "Pharmaceutical companies are now purposely communicating to consumers in a more consumer-friendly fashion. Materials are being written at a lower reading level, which is a great start for the industry as a whole. The next step is to understand that it is reading level plus the incorporation of behavioral science and learning principles plus educational design that really drive effective education."

Shelagh Brooke

Quantum



We need to recognize that any condition, no matter how serious, is life altering and impacts the course of a patient's life in some way.

Sales of Selected Lifestyle Drugs

SEXUAL FUNCTION DISORDER*

RANK	DRUG	2005	2004	2003	2002	2001
Class total		\$1,370,774	\$1,370,782	\$1,265,990	\$1,084,954	\$970,363
1	Viagra	\$858,939	\$1,006,332	\$1,139,450	\$1,036,293	\$919,731
2	Cialis	\$319,241	\$192,889	\$21,552	—	—
3	Levitra	\$149,134	\$128,980	\$58,156	—	—
4	Caverject					
	Impulse	\$16,570	\$16,992	\$17,596	\$753	—
5	Muse	\$14,948	\$15,820	\$19,293	\$20,565	\$21,307

INSOMNIA MEDICATIONS*

RANK	DRUG	2005	2004	2003	2002	2001
Class total		\$2,757,063	\$2,113,025	\$1,761,430	\$1,443,885	\$1,143,346
1	Ambien	\$2,139,192	\$1,899,648	\$1,574,643	\$1,273,624	\$986,900
2	Lunesta	\$321,794	—	—	—	—
3	Sonata	\$117,282	\$121,728	\$112,906	\$105,798	\$93,407
4	Ambien CR	\$72,951	—	—	—	—
5	Restoril	\$42,875	\$39,614	\$33,788	\$19,865	\$12,835

* Total U.S. Sales, \$ are in thousands

Source: IMS Health, IMS National Sales Perspectives, February 2006, Plymouth Meeting, Pa. For more information, visit imshealth.com.



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NEW Sales Performance Optimization™ Reveals the Unseen Risks for Your Brand—and the Actions to Keep It Safe (Even When Competitors Try to Make Waves).



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To find out how SPO can optimize your sales effectiveness, contact Jeff Zornitsky at 508-358-2458 or Jeffrey.Zornitsky@tns-global.com.



Patrick Angelastro

ImpactRx

Footing the Bill:
Who Pays?

Once marketers capture the attention of consumers and physicians, there is the issue of who pays for the drug.

"Do we, as a society, pay for a lifestyle product?" Ms. Rogers asks. "And, if we pay for the products, do we also cover any side effects incurred by patients taking the products?"

Most insurers and employers are reticent to cover many of the lifestyle products. Additionally, there has been an increase in the movement to a three-tiered health-plan approach. Some organizations are even implementing an alternative structure, with the fourth tier being lifestyle drugs and the fifth being specialty pharmaceuticals.

A 2004 PricewaterhouseCoopers survey of executives from large, multinational businesses found that they were worried about the cost of healthcare and specifically the impact of rising costs for prescription drugs. In fact, 87% adopted approaches to reduce their programs' costs, and 15% said they had reduced or elim-

Since the lifestyle markets are promotionally intensive and patients are on these drugs for a relatively brief time, competing in these markets can be an expensive proposition.

inated coverage for lifestyle drugs the previous year.

To address formulary and reimbursement issues, some companies, such as InfoMedics Inc. and ImpactRx, are using survey data to support clients' marketing efforts.

"We survey patients before they begin a medication and then again after they have been on the drug," Mr. LeVine says. "These reports go to the physician as feedback. These data also can be aggregated to support formulary access in managed-care organizations. In addition, we can use these data to support the work of the sales rep and to help the physician understand how other similar patients in his or her practice could also benefit from the product."

ImpactRx uses physician-office collected



data to evaluate the rate of patient requests converted into samples and written prescriptions.

"There seems to be a higher percentage of conversion with lifestyle products, although there is variability in conversion across therapeutic classes," Mr. Angelastro adds. ♦

PharmaVOICE welcomes comments about this article. E-mail us at feedback@pharmavoice.com.

weblinx To register for a FREE WebSeminar on Optimizing DTC Advertising, go to pharmavoice.com/weblinx/dtc.

Experts on this topic

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