

# Stepping Up Brand Relevance in THE NEW AGE OF HEALTHCARE

*"The consumer isn't a moron; she is your wife. You insult her intelligence if you assume that a mere slogan and a few vapid adjectives will persuade her to buy anything. She wants all the information you can give her."\**

DAVID OGILVY *Confessions of an Advertising Man*

It's always refreshing to see the timelessness of David Ogilvy's quotes. Even if, on the surface, they seem to come straight from the mouths of 1960s Mad Men, his wisdom still rings true today. The above quote is especially relevant in today's rapidly changing world of healthcare.

As healthcare costs approach a mind-boggling 20% of our GNP at the same time as the glut of baby boomers begins to age out, everyday consumers will be expected to shoulder more personal responsibility to stay healthy and manage their own healthcare footprint.

Consumers will have to sharpen their knowledge to address their newfound role, and they are hungry for education.

## Empowerment Paradox

With greater coverage, speed of innovation in medicine, and the convergence of technology with healthcare, consumers are being handed the keys to empowerment. Increased connectivity helps to facilitate their information-seeking needs and track health metrics, while expanding points of care allow them more flexibility to engage with their healthcare providers, caregivers, and communities.

But, there is a paradox to this empowerment. On top of their already busy schedules, the effort required to keep on top of health decisions as one navigates a more complex healthcare ecosystem can be downright daunting. We all know that consumers want to live a healthy lifestyle, but they struggle in their actions. In fact, despite all of the collective knowledge out there, obesity, diabetes, and hypertension rates continue to rise, and not just among older Americans.

Adherence to medication that could help avert or reduce more serious and costly interventions remains lackluster at best. So while the desire is there, this new healthcare consumer is not fully equipped to take on this added responsibility.

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## Needs-Based Brand Marketing Opportunity

This new reality presents healthcare brands with a significant opportunity to embrace and address consumer needs by providing better functional and emotional support throughout their health journey. Much like the revolution that took place in the CPG space, the market is moving from a marketing-driven model to a needs-based environment. While HCPs will firmly remain the first port of call given their roles as credentialed authorities and healers, healthcare brands are beginning to recognize the "voice of the consumer" (individual and community) and are speaking to this target with a newfound respect. Brands are stepping up their relevance to partner with consumers in navigating this brave new world.

## Our Mission: Defining Early-Stage Best Practice

As marketers in the industry, we've been fortunate to participate in this change. We wanted to take a step back and gather evidence as to how brands are starting to forge different relationships with today's consumer. We wanted to understand the emerging trends in brand communication that support the needs of a more empowered consumer, and then codify early-stage best practice in this space.

Our approach was two-fold.

We started by taking a macro-view at consumer communication spending trends, highlighting shifts between 2009 and 2014.

Second, we chose three therapeutic areas to examine differences in their approach over time: cardiovascular, diabetes, and arthritis. These three areas have two things in common — consumer spending remains high and conditions are quite prevalent.

## Trends in Pharmaceutical Consumer Spending

» **Overall decline in spend.** It is no surprise that consumer communication spending (TV, print, radio, newspaper, and Internet) has declined by 27%\* between 2009 and 2014, reflecting the post-patent cliff effect. And that's a shame because there is plenty of evidence that consumer communication acts to remind people to visit their doctor, refill their prescriptions and persist with therapy. In other words, it helps create greater personal accountability for managing one's health.

» **Shift from broad indication blockbusters to more specialized disease states.** For example, while spending in the arthritis category almost doubled between 2009 and 2014, the focus has shifted from osteoarthritis to rheumatoid arthritis and, on a smaller level, psoriatic arthritis.

Today's brand mix does not reach the heyday spending levels of the prior generation of osteoarthritis blockbusters. The same phenomenon can be observed in cardiovascular, where bigger-spending statin brands are being replaced by more brands, spending less, in support of other cardiovascular indications like AFib and blood clots.

» **End of One-Size-Fits-All.** This change in the complexion of DTC spending puts even more onus on brands to do more with less as they seek to build relationships with consumers along the decision-making journey. Rheumatoid arthritis, diabetes, and AFib are complex chronic diseases. One-size-fits-all no longer works. Today's consumers need help deciphering how to manage their condition and insight into the right treatment options for their personal needs. They are proactive, and feel empowered to speak up to their doctors about what they are learning. They do not want to trade off on efficacy, safety, or quality of life. Brands need to connect through a higher level of understanding and insight.

## Brand Communications Are Evolving

How are brands empowering consumers to take charge of their health? Have things really changed? We observed the following changes in brand communications:

### Show Greater Respect for Consumers' Intelligence

The era of metaphors and cartoons is coming to an end. Healthcare brands understand that there is a new level of sophistication among consumers. With several treatment options in many therapeutic areas and educational resources at their fingertips, consumers now have a better understanding of efficacy, safety and even how drugs work.

Brands are responding by focusing more on brand differentiation versus disease-state education basics. We're seeing a renewed focus on MOA science as a differentiator, which can aid a more productive doctor/patient dialogue.

### Convey Less Fear-Mongering and More Promise of Positive Outcomes

We've noticed a definitive shift from problem to solution. Whereas communications once dwelled on the limitations of living with a disease, brands now convey a more motivat-

ing return to normalcy. Rather than focusing on the isolation and darkness of disease, brands are promising benefits filled with humanity and everyday activity. Benefits that convey reengaging in life can provide hope, to in turn motivate consumers to speak to their doctors about better options.

### Play the Role of Partner, Not Preacher

Brands are recognizing that today's consumer is not passively waiting to be told what to do. She turns to her personal ecosystem, made up of experts, web resources, caregivers and community, to help make informed choices. She prepares herself for her doctor visits and feels comfortable sharing her experiences with others. Efforts of 2014 portray this new generation of proactive patients. Thus, to support consumer engagement, brand communications have shifted from a more didactic monologue to a more interactive partnership with consumers and their extended communities.

### Take a More Holistic, Integrated Approach

Brands are reflecting a more relevant, contemporary view on treatment in their communications. With the impetus to stay healthy to manage costs as well as the infusion of Eastern philosophy in Western culture (such as yoga, acupuncture, and the perspective that the body is an interconnected ecosystem), DTC is evolving to meet the needs of today's consumers. While just five years ago, DTC took a more traditional view of treatment — "drug adherence = keeping disease under control" — today's brands are reinforcing how treatment + active role patient plays through diet and exercise help drive results.

### DTC Is on a Journey

While we are just beginning to understand consumer needs in the new healthcare landscape, evidence is mounting that brands are stepping up to support consumer needs.

Consumers are playing a more active role in decision-making for their health. They are having more informed conversations with their HCPs and thus becoming a greater influence on brand selection, but still value partnership and guidance.

By embracing these basic principles, healthcare brands can make a greater imprint on consumers' consideration sets and build an emotional connection in the long haul.

### Respect Consumers' Intelligence

They are more knowledgeable about how

disease affects the body and want to understand how your drug works differently to manage the condition. They may even spend time reading clinical trial information. While they might not want to go deep on the science, science does matter because it helps consumers have more intelligent dialogue with their HCPs.

### Positive Outcomes Trump Fear

Regardless of whether consumers are newly diagnosed or diagnosed but dissatisfied with their treatment, they want reassurance that there is a solution that meets their needs. They want guidance to help them navigate the bumps in the road ahead, and seek inspiration that they will return to a sense of normalcy. Brands can help connect them to benefits, resources and community that motivate them to stay the course.

### Consumers Welcome Brand Partnership

They are now accountable for staying healthy and keeping on top of decisions across their health and wellness footprint. This is a big responsibility. And, in many cases, they may also play the role of caregiver in their household. It's impossible to do this job alone, so they appreciate information and resources that help better prepare them.

### Convey a Contemporary Approach to Health Management

Consumers understand that staying healthy and managing conditions require effort. While some may want to simply take a pill to fix a problem, there is a high awareness around the incremental benefits of diet and exercise. The brand may be the hero, but to build credibility with consumers, it's important to embed the brand in relevant context. Brands should not stop at communicating their convenience factor (e.g., once a day), but also help consumers navigate a healthier lifestyle.

We look forward to continuing this journey with our healthcare brands and will no doubt expand this list as we continue learning how to connect with today's more empowered consumer. PV

*Editor's Note: \* Source: Kantar Media Strategy 2009 and 2013.*

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