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THE ANGELIQUE

“hormone replacement”

SUCCESS STORY

Taking a Different Approach



By Kerry Doyle

An In-Depth Look at Marketing Success

Introduction—Taking a Different Approach

Angelique was a new estrogen/progesterone combination product that used a non-hormonal type of progestin (DRSP). The goal was to define the best opportunities for growing Angelique’s market share and to establish a strong brand presence. This white paper outlines the five key steps for excellence in marketing and for achieving those goals:

- Defining Scope of Market
- Analyzing the Buying Process
- Identifying Leverage Points
- Performing Market Segmentation
- Action Plan

It explains how the Angelique executive team used research and data to make profound marketing changes that led to Angelique’s success in the hormone replacement market.

Defining the Scope of Market

To assess market opportunities for Angelique, the Scope of Market had to be defined as well as decisions made regarding where to focus marketing efforts. Defining the scope of a market enables one to assess the economic playing field for a product. It provides responses and data to essential questions that best characterize a specific market.

In the case of Angelique, certain questions needed to be answered, such as Was the hormone replacement therapy market growing? And, How many new users were accruing yearly? One promising segment that represented optimum growth potential appeared to be women in the age range of forty-five to sixty years, the baby boom generation.



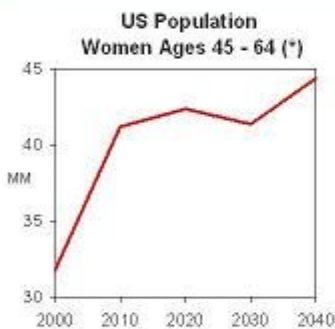
However, a clinical study by the Women's Health Initiative (WHI) had found an increased cancer risk for women undergoing hormone treatment. This had resulted in an overall market decline in both growth and usage.

There was also little opportunity for brand switching in segments which had an established brand affinity. Once this information was assembled, it provided an accurate picture of the current state of the market.

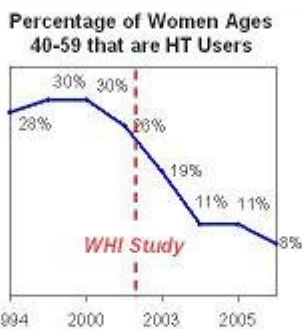
Menopause management success story

Main opportunity is in capturing new starts

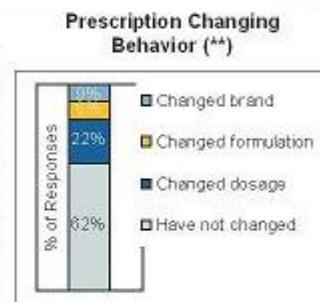
Market Dynamics



- Due to population growth dynamics, the number of women eligible to receive HT is expected to increase at a rapid pace over the next 30 years



- Percentage of women, aged 41-59 using HT dropped from 30% in 2000 to 8% in 2006
 - The number of HT users peaked 2 years before the major findings from the WHI study were published.
 - The average length of therapy for HT is 4.2 to 4.5 years, which could indicate that the users' base has been mostly renewed in the 5 years since the publication of the study



- New patient starts are the most important source of growth for the different players
 - There is almost no brand switching occurring in the market, however every patient initiating treatment will stay on therapy for an average of at least 4.2 years



Analyzing the Buying Process

Next, a Buying Process was developed. First, a series of brainstorming sessions were assembled to help focus the marketing efforts. These cross-functional teams consisted of members from marketing, sales, market research and medical affairs. In this configuration, the teams could challenge each other to arrive at the most accurate picture of the current environment.

For example, the medical team would have opinions based on best practices. However, the sales team could provide a more realistic assessment of physician behavior from field experience. We then performed qualitative research by interviewing both patients and physicians. We used this data to help us better understand current market dynamics and, ultimately, to refine our buying process.

In the past, hormone replacement therapy was regularly prescribed by physicians for patients who required treatment. Now, as a result of the WHI study, the market was being driven by patients who decided whether or not to use hormone therapy for symptom relief. Physicians were now primarily responsible for brand choice and prescribing dosage amounts.

Identifying Leverage Points

Next, it was important to identify leverage points for both patients and physicians. The marketing team looked for places in the Buying Process where it could intervene to convince customers to adopt the desired behaviors. A few key insights helped us to focus the process of selecting leverage points. It was found to be crucial for both patients and physicians to learn about drospirenone (DRSP), a new form of estrogen, at the information gathering stage.

In addition, marketing identified leverage points for both physicians and patients that corresponded to Angelique’s efficacy for severe symptom relief. They wanted physicians to focus on patients who would be unlikely to switch brands once treatment had begun and who would not need titration.



It was necessary to attract patients who desired immediate relief versus those who needed long-term, low dosage treatments.

Angelique's position as a new product meant there was a lack of quantitative data regarding efficacy rates and patient usage patterns. However, using qualitative evaluations and best judgement throughout the Buying Process, marketing was able to determine key leverage points.

Performing Market Segmentation

The Segmentation process helped to assemble physician and patient behavior variables that were both meaningful and actionable. The marketing team wanted to identify differences between the segments and prioritize those that aligned with the benefits of using Angelique for hormone therapy.

For patients, they identified a key segment as menopausal women who had a non-hysterectomized status and exhibited severe symptoms. Gathering data on the menopausal stage of these patients would help to estimate the number of years they would likely continue hormone therapy treatment.

Another variable was socially active women who characterized their symptoms as severe based on symptom frequency and how often their activities were adversely affected.

The team hypothesized a high correlation between women on medication who were predisposed to choosing hormone therapy versus women who were generally healthy and had unfavorable opinions regarding hormone therapy.



In the case of physicians, there were a number of assumptions to test. For example, it was apparent that fifty percent of these physicians had strong brand loyalty and often prescribed Wyeth products. After analysis, the conclusion was that the percentage of low-Wyeth OB/GYN prescribers represented the best opportunity for increasing Angelique’s market share.

In addition, physician age was a factor because older physicians would more likely prescribe hormone therapy based on previous experience prescribing treatments. In contrast, younger physicians with the newest health data and studies would be less likely to prescribe hormone therapy.

Identifying Growth Areas

As a result of research and the segmentation process, it was recommended to focus on OB/GYN physicians who would prescribe Angelique to non-hysterectomized women for rapid relief of severe symptoms. Marketing identified this segment as the key drivers for brand choice.

It was also determined that key areas for growth were to expand knowledge of Angelique as a new therapy, to drive prescriptions and to increase usage among patients.

Message content was based on where a physician was located in one of the three stages of behavioral change. The first stage, Take Notice and Unfreeze, meant increasing awareness of Angelique as a new estrogen/progesterone combination product that used a non-hormonal type of progestin (DRSP). As physicians became aware of the product, they could begin to incorporate it into their range of treatment options.

In the second stage, Evaluate, physicians would begin to prescribe Angelique for non-hysterectomized patients who needed rapid relief from severe symptoms.



In the third stage, Use and Reflect, physicians could acknowledge Angelique’s efficacy, create success stories and broaden usage to other patients.

Emphasised mobility in both segments

Menopause management success story
Message roadmap to activate behavioural shifts
Example: Product-Specific Physician Activation Roadmap

New Approach	Stage 1: Take Notice & Unfreeze	Stage 2: Evaluate	Stage 3: Use & Reflect
Desired Behavior & Message Theme	I Increase awareness in the marketplace of a new E+P fixed combination product efficacious in symptom relief and with a different type of progestin: drsp (non-hormonal)	II Drive prescription for non-hysterectomized patients experiencing severe symptoms for immediate symptom relief highlighting that drospirenone is a different type of progestin, non-hormonal	III Increase usage leveraging the physician's own success stories with patients (i.e., symptom relief occurred rapidly) and reminding positive attributes to generate repeat uses
Sales Activities	<ul style="list-style-type: none"> Focus on OB/GYNs in the target population currently unaware of Angelique Promotional events (e.g., dinners, lunches gathering) will play a key role due to peer influence 	<ul style="list-style-type: none"> Focus on benefits emphasizing drsp message Samples play key role in driving trial Real findings presented in conferences 	<ul style="list-style-type: none"> Dialogue focus moves from product attributes to getting physicians to realize the success Samples play key role in driving repeat usage
Clinical	<ul style="list-style-type: none"> Data should focus on basic HT attributes, e.g., symptom relief, low risk of CV disease, benefits for concomitant conditions (i.e. osteoporosis) Data should highlight the benefits of drsp / Angelique 	<ul style="list-style-type: none"> Key data points MSL could play a pivotal role in passing on any new data on benefits of drsp / Angelique 	<ul style="list-style-type: none"> Physician already knows attributes, MSL's move to build relationships, i.e. ensure all new clinical data is delivered promptly Identify new potential HCLs and new sources for HCL

Action Plan

In each of the marketing steps, the team acquired key information and insights. The Scope of Market and the Buying Process helped to identify both the physician and patient segments that were crucial to increasing Angelique’s market share.

The Angelique Action Plan synthesized all the marketing decisions that were made up to this point into an effective plan for activation. Once the activities were defined, the marketing team concentrated their resources on expanding knowledge of Angelique as a new therapy and convincing physicians to prescribe it. The team focused on two types of messaging activities: a public campaign dedicated to changing general opinions, and a marketing effort directed toward physicians, low-Wyeth OB/GYB prescribers.

