

Branded Drug Websites:

A Look at Major Trends in Healthcare Marketing

- The growing Impact of the Multicultural Market
- The Need to Expand Digital Capacities

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The following report contains statements that are forward-looking, including expectations and predictions regarding the future of healthcare and pharmaceutical marketing and its development. Actual results may differ materially from our expectations or projections. Readers are cautioned not to place undue reliance upon forward-looking statements, which speak only as to the date of this document. Except as required by law, neither Global Advertising Strategies nor any of its affiliated entities undertake any obligation to update any forward-looking or other statements in this document, whether as a result of new information, future events or otherwise.

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Abstract:

Research Objective:

This paper reviews the promise and potential of two major trends bound to influence the digital information landscape for healthcare in the United States. The first being the ever-growing impact of ethnic market segments as a result of their tremendous population and economic growth, as well as the health-related challenges they face due to high rates of certain chronic conditions, poor compliance, and a shortage of culturally-capable providers. The second trend is the deeper utilization of novel digital capacities, in particular, in overcoming barriers to accessing healthcare related information and improving the health of patients of all ethnic backgrounds. This paper gathers data and analyzes how pharmaceutical companies have responded (or failed to respond) to these two trends to fully maximize their revenue-generating potential. Finally, this document seeks to provide guidance and recommendations on how to better capitalize on these trends, by offering a demonstrated approach for designing and launching a cultural/language online initiative within cross-cultural markets by cost-effectively leveraging a brand's current online infrastructure.

Research methodology:

- Analyze market patterns and digital behavioral characteristics of major racial and ethnic groups in the U.S. as they relate to healthcare information.
- Analyze the digital capacities, including the mobile-web, available to pharmaceutical companies to communicate with the major racial and ethnic groups in the U.S.
- Compare the extent to which major pharmaceutical companies have actually utilized novel capacities of the Internet in their dialogue with racial and ethnic groups.
- Based on Global Advertising Strategy's past experience and thought-leadership in the cross-cultural space, provide guidance, recommendations, and offer a proven approach for designing and launching an online cultural/language initiative within cross-cultural markets.

Conclusions:

- The cross cultural community in the United States represents a lucrative opportunity for the healthcare market, and their Internet/mobile usage characteristics are well-suited for sophisticated digital communications.

- There are currently three (3) levels of Internet usage by pharmaceutical companies to communicate with racial and ethnic communities:

1. Basic: the availability of resources in PDF format
2. Intermediate: the development of a dedicated microsite(s) for an ethnic consumers
3. Advanced: the presence of interactive, online tools for patients and health service providers (HSPs,) to ensure better disease awareness and education, drug selection, and prescription compliance.

- There are noticeable differences among major pharmaceutical companies in their digital communications outreach ethnic communities. Many have begun to move from level 1 to level 2, but very few have further developed to level 3. The pharmaceutical industry as a whole has yet to realize the full potential of the Internet and mobile technologies in their outreach to ethnic communities. The complete shift from simple PDF-presented brochures to interactive web and mobile services is still in its infancy.

- Most pharmaceutical brand marketers and healthcare clinicians are intrigued by cultural/language consumer online strategies, and generally recognize the need to augment their expertise in cross-cultural online marketing in order to fully maximize their revenue-generating potential, but this has yet to translate into widespread and sustained observable action.

- The presence of interactive digital communications is necessary in order for the pharmaceutical companies and HSPs to ensure full relevance and profitability. The web and mobile technologies have the potential to both deliver personalized and culturally-tailored communications over platforms that are widely used and highly-trusted by ethnic consumers. Digital communication can bring value across the fundamentals of healthcare delivery, from access to outcomes.

- Attaining a sophisticated digital communications platform represents a commitment to social responsibility. To create an optimal patient experience and, ultimately, serve the needs of patients of all ethnic backgrounds, would partially alleviate major bottlenecks in American public health.

ABOUT THE AUTHOR

Global Advertising Strategies is a consultancy and full-service agency that successfully applies analysis of market trends to cross-cultural marketing for the benefit of its healthcare clients. In addition to analysis of individual trends, Global provides a multidimensional picture of different trends interacting with each other. The two purposes of Global's trend analysis are 1) to decipher optimal marketing strategies for cross-cultural marketing and advertising today and tomorrow, and 2) to preclude and/or correct mistakes otherwise inevitable without comprehensive trend analysis.

This report begins a series of Global's analytical publications solely devoted to the comprehensive analysis of cross-cultural marketing and advertising for the pharmaceutical industry. It analyzes two emerging trends and demonstrates that when applied in combination, these trends reveal easy-to-fix mistakes and lead to specific and actionable suggestions for pharmaceutical companies.

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From Being Pioneers to Being Left in the Dust

By Givi Topchishvili, Founder and CEO

Nearly 15 years after founding Global Advertising Strategies as a cross-cultural communications agency, I am finally seeing the light at the end of the tunnel. The better half of our first decade was spent proving that the under-tapped and emerging audiences in the U.S. will, in many ways, dictate the marketing strategies of tomorrow. Last year, the Census finally confirmed what we have been saying for over a decade.

At times I catch myself doing a double take at recent headlines that focus on the importance of competently reaching the multicultural consumer — they appear to be taken out of our presentations circa 2005.

Today's multicultural America isn't just an opportunity for our industry to secure additional revenue. Most Fortune 500 companies have already incorporated cross-cultural outreach in their strategic planning. The demographic shift makes it our responsibility to mind cultural and social intricacies when communicating with niche audiences, especially on such sensitive and critical subjects as health, safety and education. As the ones responsible for crafting the message behind a brand, we have a chance to make a difference for the future generations, raising the bar from being ROI-driven to being socially responsible.

This remarkable increase in ethnic, cultural and linguistic diversity that the U.S. has witnessed presents a growing need for disseminating culturally-competent, in-language health information and services. A startling Census statistic states that nearly 47 million U.S. residents aged 5 or older speak a language other than English at home.

A first in a series of many, the report that follows examines a small fragment of what is being done by the leading pharmaceutical companies to reach the multicultural and multilingual consumer online. Their efforts vary and include those who completely ignore the growing demographic as well as those who skillfully engage with it, potentially minimizing health disparities in the U.S.

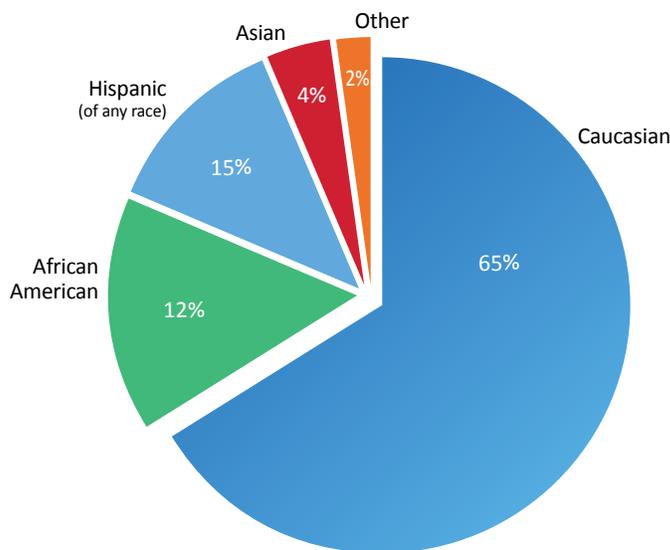
I hope you find the report informative and helpful, but mostly I hope that it makes you realize the full potential of today's multicultural consumer as well as the importance of an appropriately crafted multicultural message.

Key Trends in the U.S.

THE EVER-GROWING IMPACT OF THE ETHNIC MARKET ON HEALTHCARE

The U.S. Multicultural Market Overview

The results of the 2010 Census have brought multicultural reality into the limelight, revealing that the ethnic community has demonstrated stronger growth than that of the non-Hispanic white or Caucasian population. More than half of the growth in the total U.S. population in the last decade has come from multicultural segments. As illustrated in Figure 1 below, three groups in particular dominate the U.S. multicultural landscape: **Hispanic, African American and Asian American.**



Hispanics

According to the 2010 Census results, the Hispanic population in the U.S. grew by 43% to 50.5 million. Hispanics now make up 16% of the total U.S. population. Not only are Hispanics one of the fastest growing ethnic groups in America, they also account for over half of the 27.3 million person-increases in the total population over the last decade.

In contrast, the dominant racial group of non-Hispanic whites grew by only 1%. Despite this growth, the proportion of total non-Hispanic whites decreased by 5% in the last decade to 64% of the total population.

In the last ten years, Hispanics have been firmly established as America’s largest minority group, which continues to expand yearly with high growth rates. With such sustained growth, Hispanics are forecasted to comprise well over 30% of the total U.S. population by 2050.

African American

African Americans comprise the second largest racial minority group in the U.S. representing 12.6% of the total U.S. population in 2010. While the proportion of African Americans in the total population has remained relatively constant since the 2000 Census, the group as a whole has grown by 12.3% over the last decade. They are, and will continue to be, strong cultural influencers and a large slice of multicultural America.

Asians

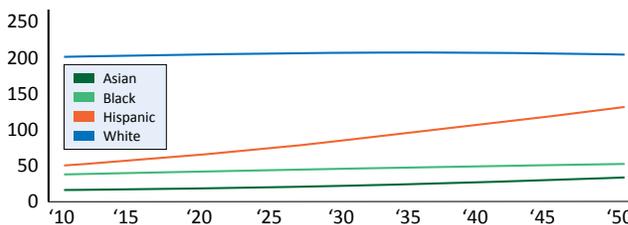
The Asian American population within the U.S. is mainly comprised of Chinese, Indian, Filipino, Korean, Japanese and Vietnamese populations, with Chinese, Indians and Filipinos representing the largest communities.

Asians currently account for only 4.8% of the total population in the U.S.; however, according to the 2010 Census, their population grew rapidly at a rate of 43.3% over the last decade—faster than any other major racial group. Census forecasts predict the

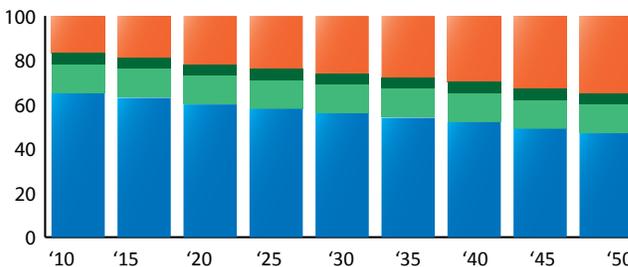
proportion of the Asian population will continue to increase. By 2050, Asians are expected to comprise over 8% of the total American population.

The Nation of Tomorrow

The Latino population is driving the shift to a majority-minority country.



Projected population change, 2010-50



Projected shared of the population, 2010-50

Figures 2 and 3 above convey a single message—**multicultural consumers can no longer be ignored**. As reported by the Selig Center for Economic Growth, the total buying power of multicultural America in 2010, which includes Hispanics, African Americans, and Asian American markets, is 2.7 trillion.* This buying power has grown by a staggering 85.1% since 2000, versus the 43.6% growth in buying power of the non-Hispanic white population.

The Hispanic population alone has demonstrated an extraordinary rate of growth in buying power over the last decade – a 107.6% growth rate, reaching up to \$1 trillion in 2010. This significant growth is expected to continue, with forecasters predicting buying power for Hispanics to reach \$3.7 trillion by 2015.

*Please note that the Selig Center’s data for Asian Americans combines two race categories, including those who identified themselves as Asian or as Native Hawaiian and Other Pacific Islander.

Insurance coverage and purchasing power of ethnic market segments

A common misconception in the healthcare industry is that ethnic minorities in the United States lack adequate insurance coverage. Based on Figure below, all groups demonstrate high levels of coverage, many of which do not greatly differ from the non-Hispanic white population.

Ethnic Group	Percentage of Insurance Coverage
African American	81.90%
Hispanic	69.00%
Chinese American	86.90%
Korean American	75.10%
South Asian	88.40%

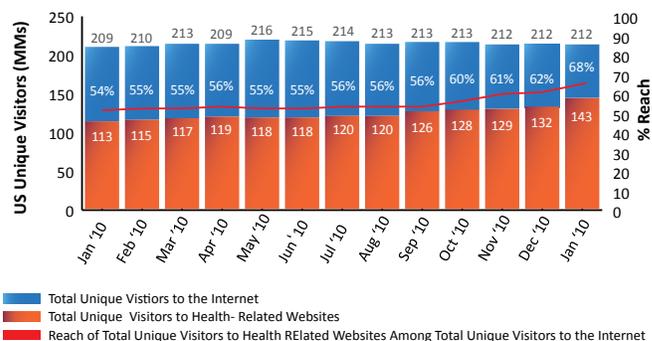
Source: Income, Poverty, and Health Insurance Coverage in the United States, 2010

Over the next few years, with the implementation of the Affordable Care Act, the percentage of the population without coverage is expected to further diminish.

Online and Mobile (mHealth) Healthcare Search Behavior of the Multicultural Markets

In January 2011 alone, 143 million people, or 68% of Internet users in the U.S., visited a health-related website (comScore, 2010). Therefore, while healthcare professionals continue to be the primary source of healthcare information, Internet and mHealth sources are gaining significance.

Total Internet and Health Visitation by US Unique Visitors



Source: comScore Media metrix, Jan-2010 – Jan-2011

In addition to email and search, a strong majority (83%) of internet users have used the internet to search for health information, making this activity the third most popular for all online adults.

Additionally, searching for health information, an activity that was once the primary domain of older adults, is now the third most popular online activity for all internet users 18 and older.

Furthermore, the mHealth trend continues to grow, which provides many new health and technology growth opportunities for pharmaceutical companies. According to a report by research2guidance, 1 in 5 people around the world will have a

smartphone by the year 2015 (Jahns et al., 2010). The goal of mHealth is to leverage the ubiquity of mobile communication by optimizing access to health-related information and bringing greater efficiencies to healthcare delivery. mHealth also aims

a strong majority (83%) of internet users have used the internet to search for health information, making this activity the third most popular for all online adults.

to incorporate mobile messaging (text and voice), mobile web, and native apps in customized formats to gain traction with several different populations and ethnic groups. As consumers continue to embrace mobile devices or platforms to find and share information and monitor bio-data, they will increasingly look to take charge of their personal health as well. This presents a significant opportunity for marketers

to encourage healthier behaviors and personalize the delivery of healthcare information and services.

With respect to racial and ethnic minority segments, mHealth can provide many patients with higher quality of healthcare education than ever before, due to greater smartphone penetration and mobile usage rates. According to Nielsen Company, nearly a third (31%) of all mobile consumers in the U.S. owned smartphones as of December 2010; however, smartphone penetration was even higher among mobile users who were part of the ethnic community – namely Asian/Pacific Islanders (45%), Hispanics (45%) and African-Americans (33%) (populations who also tend to be younger). Meanwhile, only 27% of non-Hispanic white mobile users reported owning a smartphone.

Ethnic Group	Smartphone Penetration
Asian/Pacific Islander	45%
Hispanic	45%
African American	33%
Non-Hispanic/White	33%

Hispanics

INFORMATION SEARCH HABITS

Since AOL's first annual Hispanic cyberstudy in 2002, the number of Hispanics online has grown faster than the total U.S. online population. By 2014, 39.2 million Hispanics are estimated to be online (Phillips, 2010).

Evidence from a subsequent AOL Hispanic cyberstudy in 2005 indicates that over 54% of the Hispanics surveyed use the Internet to research healthcare products. One in five also purchased pharmaceuticals online, which at the time of the study was almost twice the proportion of the general population surveyed (AOL, 2010).

Results from the 2010 Phillips study show that Hispanics are embracing new technologies across acculturation levels and breaking known stereotypes. In the Hispanic community, even the less acculturated are early adopters; they evaluate new formats and spread the word within their community.

Hispanics are very active users of mHealth both as a means of communication and as a resource for gathering health information. Eighty-seven percent of Hispanics own a mobile phone and Hispanics are more likely to own a smartphone (45% for Hispanics, versus 27% for non-Hispanic whites). One in four Hispanics that access the Internet do so via their mobile phone (Mintel, 2011). Hispanics are also more likely than any other ethnic group to look up health information on their mobile phone (25% for Hispanics, versus 19% for African Americans and 15% for non-Hispanic whites) (Pew Internet Data, Sept 2010).

Demographic profile of US mobile phone users who have used their phone for health-related activities, Sep 2010 (% of respondents in each group)

	Use phone to look up health/medical info	Use an app to track/manage their health
Gender		
Male	17%	10%
Female	16%	8%
Race		
Hispanic	25%	11%
Black	19%	15%
White	15%	7%
Age		
18-29	29%	15%
30-49	18%	8%
50-64	7%	6%
65+	8%	5%
Education		
Some high school	16%	9%
High school graduate	12%	6%
Some college	21%	13%
College graduate or more	20%	9%
Household income		
<\$30K	15%	7%
\$30K-\$50K	17%	8%
\$50K-\$75K	17%	12%
\$75K+	22%	11%
Language		
English	17%	9%
Spanish	14%	1%
Community type		
Urban	21%	12%
Suburban	16%	9%
Rural	11%	4%
Total	17%	9%

Note: n=2,485

Source: Pew Internet & American Life Project and California Healthcare Foundation, "Mobile Health 2010," Oct 19, 2010

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African Americans

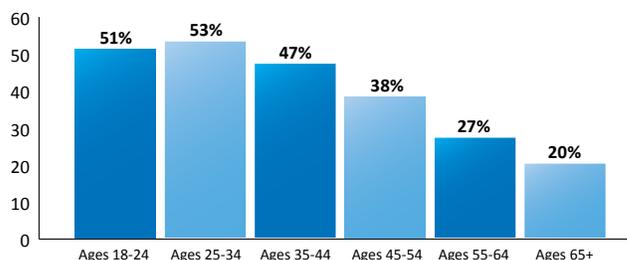
INFORMATION SEARCH HABITS

According to a recent Pew Research study, at 29%, the percentage of African American adults who do not use the Internet at all is higher than that of Hispanic and non-Hispanic white adults. Among those African Americans who do use the Internet regularly, 47% look for health-related information, which is lower than the corresponding statistic for non-Hispanic whites (63%) (Pew Research, 2011).

However, when it comes to early adoption of newer technologies, African Americans are ahead of the curve. African Americans own smartphones at a rate higher than Americans overall, according to a report released in September 2011 by The Nielsen Company. Data from “The State of the African-American Consumer” report indicates 44% of African-American adults owned smartphones in Q1 2011, 22% higher than the 36% among the overall population and up a staggering 11% from the previous year. In addition, African-Americans ages 25-34 have the highest penetration rate of all (53%), followed by ages 18-24 (51%). African Americans are also more likely to use these newer technologies to search for healthcare information online. African-Americans also have a high use of phones for emailing (43%), accessing the mobile Internet (41%), and visiting social networking sites (37%). Other common smartphone activities include app usage (33%), app alerts, playing pre-installed games and text downloads (31% each).

African-American Smartphone Penetration

% Share
Q1 2011



In-line with this trend, we can expect continued penetration of newer technologies like smartphones and tablet PCs into this key racial group as tools for information on health care.

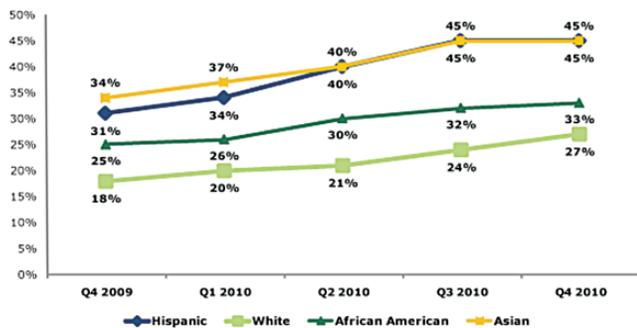
Asian Americans

INFORMATION SEARCH HABITS

Asian Americans have high incomes and high educational levels, offering a compelling argument that they are an under-targeted, yet quickly growing audience of interest. Among the various ethnic markets, Asian Americans seem to be very active online. Nielsen reports that Asian Americans have an enormous online presence, logging in over 80 hours per week more than that of Hispanics and African Americans. At 45%, the smartphone penetration of Asian Americans equals that of Hispanics (The Neilson Company, 2011). In 2010, the cellphone browsing behavior of Asian Americans was equivalent to their African American and Hispanic counterparts (Rainie, 2011).

Smartphone Penetration by Race

% of Population
Q4 2009 v. Q4 2010



Secondary research demonstrates that given the high median income and high educational levels of this group, a large portion of their time online would be spent seeking healthcare information. For example, when the Pew Research Center compared online health-seeking habits from a socioeconomic perspective, they observed that 87% of upper-income Internet users sought health-related information when online, while 72% of lower-income population users did so (Pew Research, 2011).

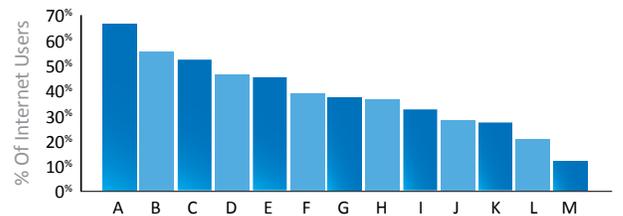
The study also found that those participants with higher levels of education were more likely to look for health information online.

Types of health-related information customers search for online

A recent healthcare study, conducted by Bupa in collaboration with the London School of Economics, evaluated the online health-information activities of individuals across 12 different countries. The study found that 68% of people sought information on medicines. In comparison, the next most common health-related activity – self-diagnosis – was undertaken by 46% of the users (McDaid and Park, 2010).

Additionally, in a study specific to the U.S., online searches for ‘a specific disease or medical problem’ and for ‘prescription or over-the-counter drugs’ figured in the top five online health-related searches (Fox and Jones, 2009). In 2010, ‘a specific disease or medical problem’ continued to be the top online search term in the U.S.

Top online health-related searches in US study 2009



- A Specific disease or medical problem
- B Certain medical treatment/procedure
- C Exercise/fitness
- D Doctors or other health professionals
- E Prescription or over-the-counter drugs
- F Hospitals/medical facilities
- G Alternative treatments/medicines
- I How to lose weight or how to control weight
- J Depression, anxiety, stress/mental health issues
- K Any other health issue
- L Experimental treatments/medicines
- M How to stay healthy on a trip overseas

The goal of a pharmaceutical manufacturer should be that when an Internet or mobile-web user conducts a disease or drug-related online search, whether in English or another language, that user is directed to a branded drug website. Branded drug websites are a powerful tool that

Branded drug websites are a powerful tool that educate patients about a disease state, increase awareness about the drug, and may lead to increases in patient compliance.

educate patients about a disease state, increase awareness about the drug, and may lead to increases in patient compliance. In fact, traffic to branded pharmaceutical websites increased by an overwhelming 82% in 2009 (Digital IQ Index, 2010).

comScore has clearly recognized that not all searches are conducted within the traditional “core” search landscape. Users in general, but ethnic consumers in particular, are now conducting searches on a variety of destinations online. For instance, in

2010, comScore added a new component to its monthly search rankings report. The “Expanded Search Rankings” report looks

beyond just the “core” search engines (Google, Bing, Yahoo, etc.) to determine which sites on the Web were producing the most search queries. comScore’s Search Rankings report from December 2010 revealed some compelling findings. Google, not surprisingly, still tops the list of search engines, but what may be surprising to marketers is that YouTube had the second largest share of search queries in the U.S. among ethnic users. Further down the list, Facebook and MySpace all made an appearance.

In fact, comScore reported that Facebook experienced over 620 million combined total searches. And given that now that Facebook has teamed up with Bing to enhance its search functionality, marketers can expect the volume of queries on Facebook to increase. But, the trend here is clear. Ethnic users (and users in general) are increasingly searching on social networks. While search engines are unlikely to disappear anytime soon, as users spend more time in social environments (and ethnic users over-index in social media usage rates), they may proportionately spend less time with search engines.

Marketers should think beyond Google/Bing and the other “core” search engines in regard to their search marketing strategies. To begin, strategies must optimize in-language content within the various existing social networks, as they have the potential to be additional and unusually significant sources of traffic for ethnic segments.

Key Trends in the U.S.

DEEPER UTILIZATION OF DIGITAL CAPACITIES

It is a well-known trend in marketing that at first, new technologies are used in a fashion resembling the outdated technologies they came to substitute. It takes time for consumers to realize that a new technology is not simply another medium for implementing old tasks. Instead, the new technology provides new ways of doing business that were not possible based on the old platform.

For example, when internal combustion engines came to substitute a horse, the first cars were designed as an exact replica of the horse carriage. It took years to realize that a new technical system could be used for new purposes. While this automotive example may be mistakenly misread as naivety on behalf of past generations, online marketers of pharmaceutical companies are going along the same path today.

Three levels of Internet utilization

Introductory - availability of materials in PDF format

For years, pharmaceutical companies have been presenting their “digital communication assets” to patients and healthcare providers (HCPs) in the form of PDF-converted brochures, booklets and other printed documents. That is similar to the beginning of the Internet age, where the most basic level of Internet content development centered on transferring printed materials to downloadable PDF files. Downloadable PDF documents provided many benefits for both the companies and the customers; however, it constituted the least interactive and minimally-customized way to engage users. To a great extent, PDF documents alone can be considered an outdated format already.

Intermediate - developing a dedicated microsite(s) for an ethnic customer group

A dedicated microsite(s) constitutes an Internet medium that is greatly preferred by the majority of users. Its benefits include, but are not limited to, the ability to insert hyperlinks to other sites, clickable phone numbers (especially for iPhone and post-PC device users), and more organic integration into an overall company website. Besides, a dedicated microsite can be better optimized from SEO, social search/media, and analytics perspectives.

Advanced - interactive online tools

The main difference between a dynamic website and static printed material is web interactivity and user engagement. A well developed site can react to a particular request of a particular user and generate a specific, relevant response—in real-time. The entire relatively short history of the Internet is a history of ever increasing interactivity and finding new ways to engage the consumer.

Actual Utilization by Pharmaceutical Companies

In Table-1 below, we summarize usage of PDF documents and microsites, which pharmaceutical companies utilize to communicate with ethnic market segments.

The table clearly demonstrates that the pharmaceutical industry is transitioning from PDFs to dedicated microsites; however, the extent to which microsites have already substituted PDFs varies greatly among the companies. For example, Merck, Pfizer and Roche present all their materials in microsite form, but 86% of Abbott materials are PDFs.

As part of its hyperlipidemia franchise, Abbot has four cholesterol drugs including NIASPAN, TRILIPIX, TRICOR and SIMCOR. High cholesterol is quite prevalent within certain ethnic market

TABLE-1 PDF FILES AND MICROSITE USAGE ON THE OFFICIAL WEBSITES OF PHARMACEUTICAL COMPANIES

		ADHD	Anti-coagulant, given after heart attack	Birth Control	Bone cancer, Multiple Myeloma	Central Precocious Puberty among Children	Lower Triglycerides, Cholesterol	Chronic Hepatitis B Virus (HBV)	Diabetes	DPWP, Fibromyalgia, Severe Depression, Anxiety Disorder, Chronic Musculoskeletal pain	HPV	Influenza Infection (Flu)	IPD	Mrcr, NSCLC, Mrcr	Men Prostrate Cancer, Women Endometriosis, Women Fibroids	Men's health-erectile dysfunction	Non-small lung cancer	Rheumatoid Arthritis	Rheumatoid Arthritis, Plaque Psoriasis, Psoriatic Arthritis, Juvenile Idiopathic Arthritis and Ankylosing Spondylitis	Rheumatoid arthritis, Psoriatic Arthritis, Ankylosing Spondylitis and Crohn's disease	
	Humira																			0	
	Lupron Depot														0						
	Lupron					0															
	Depot-Ped						0														
Abbott	Niaspan						0														
	TriCor						0														
	Trilipix						0														
	Simcor						x														
Astra Zeneca	Crestor						x														
Bayer	Mirena			0																	
	Coumadin		0																		
BMS	Baraclude							x													
	Orencia																	0			
	Byetta								x												
Eli Lilly	Cymbalta									x											
	Cialis															0					
	Janumet								x												
Merck	Januvia								x												
	Gardasil										x										
	Zometa				x																
Novartis	Focalin XR	0																			
	Lipitor						x														
Pfizer	Pevnar 13													x							
	Viagra															x					
	Enbrel																				
	Avastin																				
Roche	Tarceva																				
	Tamiflu																				

segments (e.g., Hispanics and African Americans), therefore, it would be essential for Abbot to communicate with ethnic market segments in order to drive Rx sales. Nevertheless, content for NIASPAN, TRILIPIX and TRICOR are currently being presented in the form of PDFs, and only SIMCOR utilizes a microsite. Conversely, and by comparison, AstraZeneca presents CRESTOR, while Pfizer positions LIPITOR, using dynamic microsities.

As an aside to Table-1, in our findings, we noted a great discrepancy between pharmaceutical companies and other ethnic-oriented web-based communications, such as unbranded or patient awareness campaigns. A separate report from Global Advertising Strategies will analyze specifically the percentage of information translated, and the depth of cultural adaptation of online materials. Still, it should be mentioned that the pharmaceutical industry as a whole – and each pharmaceutical company in particular – underutilizes the potential benefits of online marketing to the ethnic market segments.

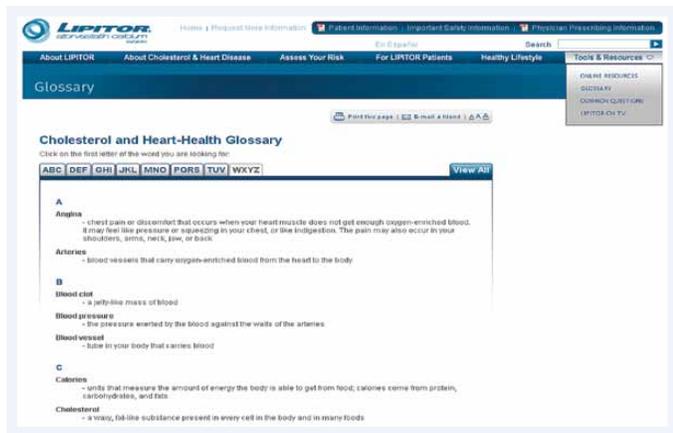
TABLE-2 UTILIZATION OF BILINGUAL TOOLS SCORE

Company	Branded Drug	Drug Indication	Bi-lingual Tools Score
Astra Zeneca	Crestor	Cholesterol, slowing plaque buildup/reduce risk of hear	9
Eli Lilly	Byetta	Diabetes	9
BMS	Coumadin	Anti-coagulant given after hear attack	7
Pfizer	Lipitor	Cholesterol	6
Novartis	Zometa	Bone cancer, Multiple Myeloma	5
Pfizer	Viagra	Erectile Dysfunction	3
Roche	Terceva	Non-small cell lung cancer	2
Bayer	Mirena	Birth Control	2
Roche	Avstin	Merc, MSCL, MRcc	1
Merck	Gardasil	HPV	1
Pfizer	Prevnar 13	Invasive pneumococcal disease (IPD)	0
Roche	Tamiflu	Influenza infection (Flu)	0
Novartis	Focalin XR	ADHD	0
Abbott	Humira	Rheumatoid arthritis, Psoriatic Arthritis, Ankylosing Spoindylitis and Crohn's disease	0
Abbott	Lupron Depot	Men Prostate Cancer, Women Endometriosis, Woen Fibroids	0
Abbott	Lupron Depot-Ped	Central Precocious Puberty among Children	0
Abbott	Niaspan	Cholesterol, lower risk of heart attack	0
Abbott	TriCor	Lower Tiglycerides, Cholesterol	0
Abbott	Trilipix	Cholesterol	0
BMS	Barclude	Chronic Hepatitis B Virus (HBV)	0
BMS	Orencia	Rheumatoid Arthritis	0
Eli Lilly	Cymbalta	DPNP, Fibromyalgia, Severe Depression, Anxiety Disorder, Chronic Musculoskeletal pain	0
Elli Lilly	Cialis	Mens' health-erectile dysfunctions	0

Bilingual tools are the next step in leveraging the full capacity of the digital medium. “Bilingual tools” refer to site elements a patient might find useful such as, ‘Questions to ask your Doctor’, ‘Cholesterol Tracker’, ‘Meal Planner’, and ‘Dosing Card/Schedule.’ Many websites have such tools on their English-language sites, but don’t have them on their corresponding in-language sites.

An in-house team comprised of market research managers and marketing executives from Global’s pharmaceutical division was formed to rank the official websites listed in Table-2. The team assignment was to score the websites of pharmaceutical companies on a scale of 1 to 10, based on utilization of interactive (at least downloadable) bilingual tools.

Table-2 reveals that over 50% of the sites with cultural content do not have any “bilingual tools.” For example, Pfizer’s LIPITOR has the entire ‘Tools & Resources’ tab missing from its Spanish-language LIPITOR site. Contrary, COUMADIN has a large number of downloadable tools for patients, available in both in English and Spanish.



Combining the Two Trends Together

The two trends discussed above lead to the conclusion that the level of interactivity of a website is directly correlated to its level of cross-cultural adaptation when targeting ethnic users. To some degree, the pharmaceutical industry has already recognized this and has made some initial steps in this direction; however, as of yet, no company has demonstrated a leadership position, or a comprehensive, cost-effective strategy based on cross-cultural competence. Presented below are a few examples – some successful, others suboptimal – of online cross-cultural marketing.

Marketing to the African American market segment via imagery on the ethnic microsites.

Only about 20% of the branded websites (out of the over 240 analyzed) have incorporated some sort of African American imagery on their pages (whether one image or multiple). This could be considered lacking, considering that African Americans represent the second largest racial minority group in the U.S. and account for 12% of the population. Some of the major diseases like diabetes, cancer, heart disease, HIV/ AIDS and Alzheimer's are highly prevalent in this community.



PATIENT DOSING CARD

Helps patients avoid confusion by identifying COUMADIN (Warfarin Sodium) tablets of each dosage strength.

[Click here for a printer-friendly version](#)



SURGERY SHEET

Provides important information for patients taking COUMADIN (Warfarin Sodium) who need to have surgery.

[Click here for a printer-friendly version](#)

RECURSOS Y MATERIALES DE LA EDUCACIÓN DE PACIENTE ENGLISH/ESPAÑOL



FOLLETO PARA COMPRENDER SU TERAPIA CON COUMADIN

Una guía útil que responde preguntas importantes, entre las que se incluyen cómo actúa COUMADIN (warfarina sódica), interacciones farmacológicas y de alimentación, y la importancia de la terapia.

[Haga clic aquí para obtener una versión para imprimir](#)



FOLLETO EL ROL DE LA VITAMINA K Y EL USO DE COUMADIN

Una referencia rápida para ayudar a los pacientes a identificar algunos de los alimentos y productos a base de hierbas que pueden afectar la terapia con COUMADIN (warfarina sódica).

[Haga clic aquí para obtener una versión para imprimir](#)

Fast Facts

- African Americans have the highest death rate and shortest survival rates than any other ethnic group in the U.S. for most cancers, according to the American Cancer Society (ACS, 2011).
- African Americans accounted for 45% of new HIV infections in the U.S. as of 2006 according to the Center for Disease Control and Prevention (CDC, 2010).
- 1 in 4 African American women over 55 years of age has diabetes (ADA, 2011).
- African American adults are more likely to be diagnosed with coronary heart disease, and are also more likely to die from the disease (OMH, 2010).
- Older African-Americans are about twice as likely to have Alzheimer's disease and other dementias as older non-Hispanic whites (Alzheimer's Association, 2011).

There are very few branded websites with specific content tailored to African Americans or with clear links to take such users to an external page with further information. Efforts that do exist are insufficient. For instance, Abbott's KALETRA does have statistics regarding HIV (See Figure 11 below) for African Americans, but the information is hidden under multiple layers. The effort to provide culturally-competent content is weak given the statistics that out of the 1.1 million people affected with HIV in the U.S., nearly half are African Americans (CDC, 2010.)

KALETRA
(lopinavir/ritonavir)

10 YEARS
FDA Approved
Since 2000

Important Safety Information | Medication Guide | Prescribing Information

Home

- About HIV
 - Raising Risk Awareness
 - Women
 - >> African American Community
 - The Latino Community
- What is HIV?
 - How HIV is Transmitted
 - The Diagnosis
 - Treatment
 - Keeping to Your Treatment Schedule
 - Goals of HIV Therapy
 - Talk to Your Doctor
 - About KALETRA
 - Positive Partnership
 - Paying for Your Medication
 - Informational Brochures
 - Medication Guide
- Abbott Global

African American Community

African Americans and HIV¹

The African American community is greatly impacted by HIV infection. While many people may think HIV/AIDS is no longer a problem, the numbers tell a different story. In fact, African Americans account for only 13% of the U.S. population, but they accounted for about half (49%) of all people living with HIV/AIDS in 2005. For African Americans, HIV/AIDS is a leading cause of death.

You can protect yourself and others:

- Get Tested/Know Your Status
- Learn more about HIV/AIDS
- Practice safe sex to help prevent the transmission of the HIV virus and other sexually transmitted diseases
- Visit your doctor or HIV/AIDS clinic to learn the best ways to protect yourself and others
- Learn how to take care of your overall health.

Click here for Important Safety Information about KALETRA.

Learn more now:

- How HIV is Transmitted
- How HIV Affects Your Body
- Treatment Information

Use²

KALETRA is a prescription anti-HIV-1 medicine called a protease inhibitor that contains lopinavir and ritonavir. KALETRA is used with other anti-HIV-1 medicines to increase the chance of treatment response in people with human immunodeficiency virus (HIV-1) infection. **It is not known if KALETRA is safe and effective in children under 14 years old.**

KALETRA does not cure HIV-1 infection or AIDS and does not stop you from passing HIV-1 to others. You may still get opportunistic infections or other conditions that happen with HIV-1.

Need help talking with your doctor about your HIV treatment?
Get the advice you need >

One of the most noteworthy and targeted digital efforts to cater to the African American community has been developed by Novartis. A clear, customized button on the main page of their hypertension drug, EXFORGE, takes the user to a page with customized content for African Americans.

EXFORGE (amlodipine and valsartan) tablets
5/180/10/10-5/180/10/10/20/30 mg

EXFORGE HCT (amlodipine, valsartan, hydrochlorothiazide) tablets
5/180/12.5-5/180/12.5-10/180/12.5-5/180/12.5-10/120/12.5 mg

For U.S. Residents Only Non-U.S. Residents

Full Prescribing Information | Patient Product Information

About High Blood Pressure | EXFORGE | EXFORGE HCT | FAQs | Patient Tools | For Healthcare Professionals

How EXFORGE Works
EXFORGE combines two of the most prescribed medicines in one pill. Find out how they work together to help lower blood pressure. [LEARN MORE](#)

EXFORGE HCT
Three Proven Medicines Combined into One Single Pill. [LEARN MORE](#)

African Americans & High Blood Pressure
Do you know your risk?
[LEARN MORE](#)

Share your success story with us
Tell us your story and help motivate others to succeed.
[Share now!](#)

SAVE \$300*
up to on your copays for a year.
Save up to \$25 if your copay is \$25 or higher.
Save up to \$10 one time if your copay is \$25 or lower.
[Save Now!](#)
*Limitations apply

EXFORGE (amlodipine and valsartan) tablets
5/180/10/10-5/180/10/10/20/30 mg

EXFORGE HCT (amlodipine, valsartan, hydrochlorothiazide) tablets
5/180/12.5-5/180/12.5-10/180/12.5-5/180/12.5-10/120/12.5 mg

For U.S. Residents Only Non-U.S. Residents

Full Prescribing Information | Patient Product Information

About High Blood Pressure | EXFORGE | EXFORGE HCT | FAQs | Patient Tools | For Healthcare Professionals

What Are the Symptoms of HBP? | Who is at Risk for HBP? | How is HBP Treated | Behind the Numbers

African Americans and High Blood Pressure

TEXT SIZE: [+](#) [-](#) [PRINT](#)

High Blood Pressure and African Americans: Do You Know Your Risk?

African Americans tend to develop high blood pressure earlier in life, have much higher blood pressure, and have a greater risk for complications from it. Because of high blood pressure, ethnicities like African Americans are:

- One-and-a-half times more likely to die of heart disease
- Almost twice as likely to die of a stroke
- Four times as likely to have severe kidney damage

EXFORGE is approved to treat high blood pressure and is not approved to treat or prevent heart attacks, strokes and kidney disease.

The good news is that high blood pressure can be treated and managed. Most African Americans with high blood pressure need more than one medicine to help them control it. Pills that combine medicines, like EXFORGE, can simplify your routine.

EXFORGE can significantly lower high blood pressure for ethnicities like African Americans. In some studies, results were seen within two weeks after starting therapy or change in dose. Individual results may vary.

EXFORGE is a prescription medication for the treatment of high blood pressure. It may be used when one medicine to lower your blood pressure is not enough. It may also be used as the first medicine to lower high blood pressure if your doctor decides you are likely to need more than one medicine.

[Learn more about EXFORGE](#)

SAVE \$300*
up to on your copays for a year.
Save up to \$25 if your copay is \$25 or higher.
Save up to \$10 one time if your copay is \$25 or lower.
[Save Now!](#)
*Limitations apply

Share Your Success Story With Us
Tell us your story and help motivate others to succeed. [SHARE NOW](#)

Patient Success Stories
Watch EXFORGE patients share their experiences. [WATCH NOW](#)

How EXFORGE Works
EXFORGE combines two of the most prescribed medicines in one pill. Find out how they work together to help lower blood pressure. [LEARN MORE](#)

Novartis successfully executes their strategy of developing an emotional connection with the African American community impacted by hypertension, while simultaneously creating a tailored brand message for that specific ethnic market. In their campaign for 'Believe in Healthy BP,' for example, Novartis has a website that links back to EXFORGE's African American page, thereby ensuring that their initiatives are integrated for maximum brand impact. With this initiative, Novartis accomplishes the tough task of subtly connecting the disease state, the African American community, and the EXFORGE brand information for optimal message takeaway.

Believe in healthy BP
Individual results may vary

Believe in Healthy BP is a community outreach program designed to raise awareness of the benefits of a healthy blood pressure. If you have high blood pressure, there are steps you can take to help reach your blood pressure goal.

At the *Believe in Healthy BP* events, attendees may receive free blood pressure screenings, learn healthy tips, and participate in giveaways.

[Learn More](#)

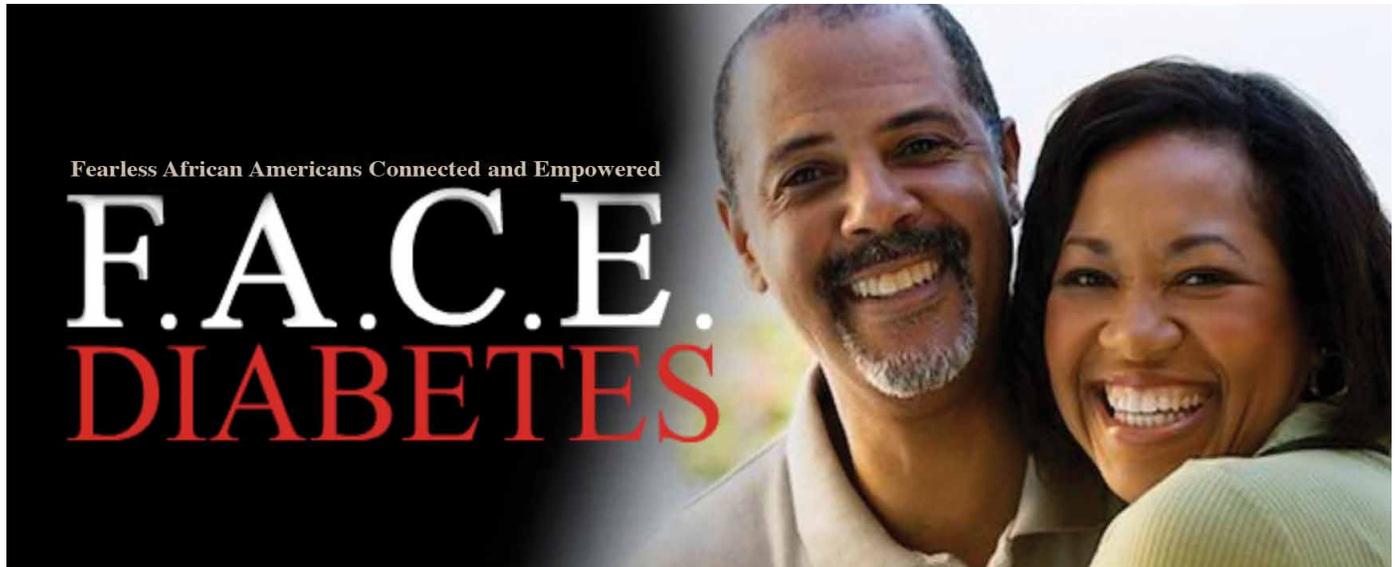
You can download helpful resources here:

- ▶ [Doctor Discussion Guide \(PDF\)](#)
- ▶ [Blood Pressure Log \(PDF\)](#)

Event Schedule

Houston, TX	The Makeover Mile University of St. Thomas, 3800 Montrose Ave	March 5 12:00pm - 4:00pm
Dallas, TX	The Makeover Mile Kiest Park, 2179 West Kiest Blvd	March 12 12:00pm - 4:00pm
Richmond, VA	The Yolanda Adams Health & Lifestyle Tour	March 19 12:00pm - 5:00pm

CASE STUDY OF A SUCCESSFUL DIGITAL INITIATIVE TARGETING ETHNIC AUDIENCES: ELI LILLY'S F.A.C.E. DIABETES INITIATIVE FOR AFRICAN AMERICANS



Fearless African Americans Connected and Empowered (F.A.C.E.)

Campaign Timeline

April 15, 2008—Eli Lilly launches a national F.A.C.E. (Fearless African-Americans Connected and Empowered) diabetes campaign to help African Americans with diabetes successfully manage the disease. Grammy-nominated “neo-soul” singer-songwriter Angie Stone, diagnosed with Type-2 diabetes, invited to be the campaign’s spokesperson.

August 2009—Eli Lilly collaborates with the American Diabetes Association to host the annual Victory Over Diabetes event in Atlanta, GA. It has now been successfully hosted for three years.

June 2010—F.A.C.E. kicks off its webisodes series on the website with virtual diabetes-friendly cooking demonstrations, culturally relevant eating and lifestyle tips, and useful advice from an African American physical fitness expert and certified diabetes educator.

August 2011—3rd annual Victory Over Diabetes event. Angie Stone scheduled to appear.

The above description is a clear indication of Eli Lilly’s long-term investment and commitment to the African American community in the U.S. Eli Lilly has also taken the campaign digitally by launching a website, www.FACE-Diabetes.com. Their campaigns and non-digital initiatives are clearly integrated and reflected on their website.

Taking the Campaign Digital

The content on the website clearly demonstrates the effort that Eli Lilly has made to understand the cultural mindset and attitudes of the African American community.

Relevant statistics

Diabetes Fact Sheet

Diabetes is a chronic, progressive condition that, if left unmanaged, can cause severe complications. The International Diabetes Federation (IDF) predicts that by 2035, that figure will grow to 476 million people in the United States alone, more than 25 million Americans aged 20 years or older are living with diabetes. Research suggests that in 2050, diabetes will affect 45.3 million people in the United States, with the largest increase occurring in minority groups. A greater percentage of African Americans are afflicted by diabetes compared to certain other ethnic groups.

Diabetes and African Americans

According to the American Diabetes Association, 25 percent of African Americans between the ages of 65 and 74 have diabetes.*

- Approximately 3.7 million (14.7 percent) African Americans age 20 or older have diabetes.
- African Americans are 1.5 times

Approximately 3.7 million (14.7%) African Americans age 20 or older have diabetes.

Culturally-Adapted Exercise Regimen

embody, successful type 2 diabetes management is about what you eat and exercise. Along with diet, stress, and medication, stress recovery is one of these diabetes-friendly strategies.

- Gospel Aerobics
- Chair Yoga
- Walking Clubs
- At-Home Diabetic Exercise Tips
- Diabetic Walk and Rest Care Tips

Exercise tips including Gospel Aerobics and at-home exercise tips.

Customized Diabetic Meal Plans

Eating Toward Wellness

The Hehni Nutrition Consultants are paid spokespersons for F.A.C.E. Diabetes.

View virtual cooking videos and learn from the experts!

Learn how to make delicious, diabetes-friendly foods that taste as good as they are good for you.

Watch diabetic cooking videos now!

Diabetes-friendly meal plans and cooking videos offering healthy take on traditional soul-food and similar African American family meals.

Spokespersons that can resonate with the community

Meet Angie and Anthony

This section introduces you to two empowered—and famous—African Americans living with type 2 diabetes. Meet acclaimed African American musical singer Angie Stone and award-winning African American actor, comedian, and writer Anthony Anderson. Read their personal stories about living with type 2 diabetes and learn how they fearlessly FACE diabetes each day!

Empowered and Famous Stars Living with Diabetes

Angie Stone

- Angie's Story with Type 2 Diabetes
- Discography

Anthony Anderson

- Anthony's Story with Type 2 Diabetes
- Filmography

**This statistic is for diabetes in general. However, according to the Centers for Disease Control and Prevention (CDC), type 2 diabetes accounts for 90%-95% of all cases of diagnosed diabetes in

Angie Stone and Anthony Anderson are paid spokespersons for F.A.C.E. Diabetes.

Inspirational stories from famous African American spokespersons.

Other examples illustrating why the effort is commendable...

Fearless African-Americans Connected and Empowered with Diabetes: Upcoming Events

Please check back as additional Fearless African-Americans Connected and Empowered (F.A.C.E.) Diabetes events are being scheduled on an ongoing basis. We hope to see you at one of our upcoming events where you can connect and become empowered with other African-Americans with type 2 diabetes.

- Indianapolis, IN**
July 6, 2011
Kappa Alpha Psi 80th Grand Chapter Meeting
Indianapolis Convention Center
- Indianapolis, IN**
July 14-17, 2011
Indiana Black Expo
Indiana Convention Center
Anthony Anderson and Hehni Nutrition consultants are scheduled to appear on July 25.
- Indianapolis, IN**
July 16, 2011
Yolanda Adams Health & Lifestyle Tour at the Indiana Black Expo
Indiana Convention Center
- Columbus, OH**
July 25, 2011
Annual Community Day Event
Location to be determined

Site is constantly updated. All non-digital campaigns are still linked to the site.

MANAGE YOUR TYPE 2 DIABETES — FEARLESSLY!

Use this brochure as a personal guide to managing your diabetes. Find basic info about diabetes and the people who will make up your diabetes healthcare team.

DOWNLOAD

Downloadable guide

Diabetic Cooking Videos

If you are a person with type 2 diabetes who loves to cook, our diabetic cooking video library is just for you. Cooking diabetes-friendly recipes does not mean depriving yourself of the foods you love! Believing that healthy food should still have soul, Roniece Weaver and Fabiola Clares, founders of the Hehni Nutrition Consultants, Inc., are here to show you that making small changes to the way you cook can make your meals heavenly and healthy. These diabetic cooking videos are designed so you can cook while you watch, so you may want to print the recipe first to follow along.

Fabiola B. Clares, R.D., L.D.
Roniece Weaver, R.S., R.D., L.D.

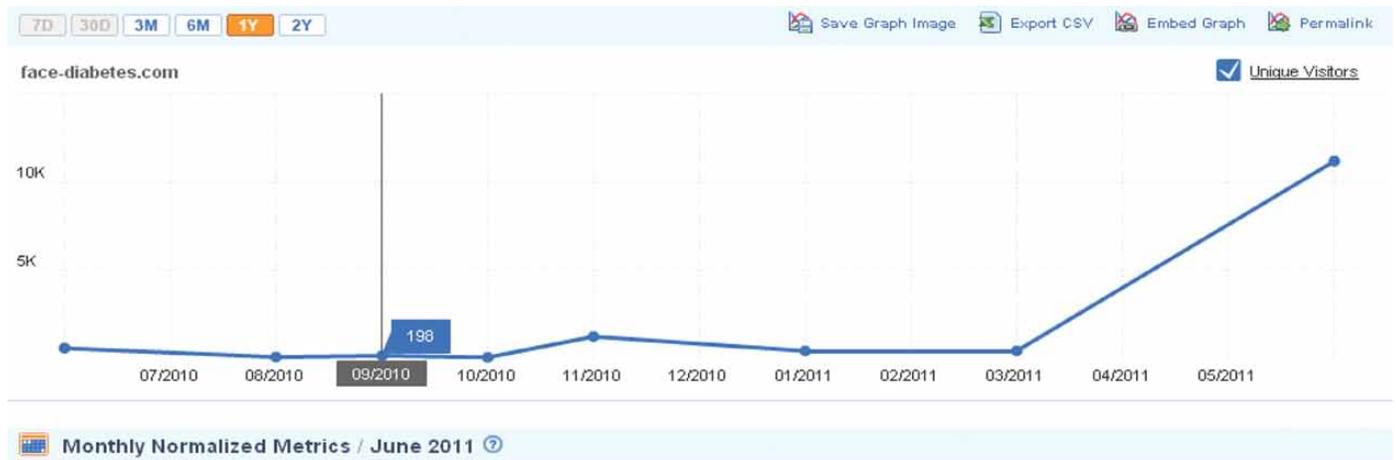
The Hehni Nutrition Consultants are paid spokespersons for F.A.C.E. Diabetes.

Hourly and Healthy Foods

Fabiola Roniece
Hehni Nutrition Consultants, Inc.

Cooking videos and inspirational talk video from Angie Stone: High degree of sophistication of site.

THE RESULT



Since its launch, the F.A.C.E. Diabetes website has been reaching roughly 31,000 yearly visitors with 67,680 yearly page views (according to statshow.com). The website is growing its online presence, currently appearing on 54 third-party sites sending additional traffic to face-diabetes.com (according to siteanalytics.compete.com.)

Achieving Cultural Competency: Transcreation versus Translation

Through Global’s extensive experience working on multichannel marketing initiatives for cross-cultural segments, we understand that merely translating communication materials is often insufficient to fulfill the needs of an effective, in-language website. When the same selling strategy is applied across cultural markets or a direct translation is used to convey a message, the emotional and cultural elements that help bind the brand to the target audience may be missed, causing the brand to project the wrong image or the audience to misunderstand the message. To achieve cultural relevance while targeting various key ethnic groups, pharmaceutical companies need to move beyond perfunctory translation and make a stronger

effort to target these growth markets in a more culturally and linguistically-appropriate manner.

1. Translations can’t be “owned.”

The original content that was created with a particular audience in mind needs to be culturally and competently adapted for a different audience.

2. Translations don’t persuade.

In the best of cases, a literal translation will only inform. If you want to persuade, the only possible call-to-action should be combining the original content with cultural cues that can modify a behavior.

3. The language of health needs to contemplate emotions.

A mere translation cannot transmit emotions or cultural sensitive. A higher level of cultural relevance can be achieved via ‘transcreation,’ or as we define ‘An adaptation of a creative work into another language or culture.’ The key word here is ‘adaptation’. Transcreation adapts the content while respecting cultural and linguistic nuances and keeping cultural relevancy in

mind. This adaptation recreates the content while retaining the original concept or idea.

CRESTOR's Spanish branded site is nuanced to address the cultural differences of Hispanics, when compared to the mainstream general population. tuCrestor.com has a completely different layout and color scheme from the main English-language landing page. It essentially changes the entire user experience. CRESTOR goes beyond just cosmetic and aesthetic customization to adapt even the dietary recommendations to a diet most commonly adhered to by Hispanics. Similarly, the BYETTA (injectable prescription medicine for diabetes) site has also gone to an equally comparable effort and detail to culturally adapt dietary recommendations.



The tucrestor.com site provides a tangible example of the depth of research that CRESTOR has conducted to understand the cultural mindset differences of Hispanics.

Bringing together a patient and a caregiver

Only 25% of the branded websites analyzed have drug access information in-language; however, the provision of coupons and

other kinds of assistance to help facilitate drug access is a common practice available on most of the main English sites. Although this standard practice has a obvious benefits from a brand-building perspective, it can send the wrong message to ethnic audiences when the site provides translation for only coupons and offers.

For instance, while the website for BARACLUDE -- Bristol-Myers Squibb's prescription drug to treat chronic hepatitis B virus -- primarily has its information in English, the drug access information on the site is provided in multiple languages, including Chinese, Korean and Vietnamese. No educational material or drug safety information is provided in-language to cater to the needs of these ethnic groups. The result of this may send the wrong message to an ethnic user visiting the site.



The Rise of the Younger Caregiver: Need for Toggle Functionality

The Pew Research Center defines a caregiver as 'a person who, in the past 12 months, has provided unpaid care to a loved one.' The three groups of people with highest rates of online health information gathering include caregivers, people who went

LOOKING ONLINE FOR HEALTH INFORMATION: HEALTH STATUS

through a recent medical emergency and people living with a chronic disease (Pew Research, 2011). Interestingly, almost half of the Internet users (48%) who go online for health information say their last search was on behalf of another person (Pew Research, 2011). Pew also concluded from the same survey that caregivers outstripped the other two categories, by double-digit margins, in researching every health topic that was included in the survey (Pew Research, 2011).

Healthcare communications, by nature, are full of medical jargon and therefore can be difficult to understand. This problem is further exacerbated by the need for younger caregivers to translate such language. We have found that often the younger caregiver may not be equipped with the linguistic ability to relay the message in another language. As a result, younger family members may turn to the Internet for relevant information and

	Percentage who go online	Percentage who look only for health information
ALL ADULTS IN THE U.S.	74	59
CAREGIVER STATUS		
Currently caring for a loved one (N=860)	79	70
Not a caregiver	71	54
RECENT MEDICAL CRISIS		
Experienced within past year — self or someone close (N=82)	76	65
No recent experience	72	55

Sixty percent of adults with a chronic condition ask a friend or a family member for medical assistance and advice (Fox and Purcell, 2010). For those caregivers that constitute the younger age brackets, it is more likely for them to go online in search of medical information than their older relatives, who might not be as Internet savvy or might not be proficient in the English language.

Using Hispanics as an example, we know that 77% of younger Hispanics log on to the web, more often than the older Hispanic population 66% young family, 56% mature family, 60% prime of life, and 33% empty nesters (AOL, 2010). Most Hispanics consume online media in English, even Hispanics dominants (AOL, 2010). We also know they primarily use it as a tool to convey information and educate their loved ones in Spanish, based on cross-cultural expertise and research of Global Advertising Strategies.

use in-language branded drug websites as a tool to help them relay the information related to a particular medical condition.

A significant tool in this area is a technology we identified as the 'toggle functionality.' The main purpose of toggle functionality is to allow a user who prefers English and a user who prefers a foreign language to simultaneously review the information together.

Consider, for example, the needs of a young bilingual Hispanic female, raised and educated in the U.S. who cares for her elderly grandmother. Given that she may want to engage in conversation with her grandmother regarding cholesterol management in their language of choice, she we need a way to ensure that the information she understands in English will carry over into Spanish. In other words, content should be available interchangeably in the two languages. While the young woman may feel more

Source: Pew Research Center's Internet & American Life Project, August 9 – September 13, 2010 Survey. N=3001 adults and the margin of error is +/- 3 percentage points for the full sample. Margins of error for sub-populations are higher.

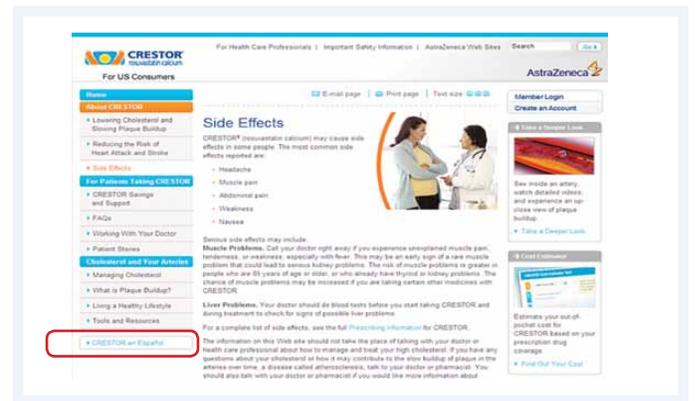
comfortable reading and speaking English, her grandmother may be more comfortable reading and speaking Spanish. Therefore, she may conduct an online search to find information about cholesterol – hopefully in Spanish – but will need the ability to match back the information in English. To illustrate the problems associated with a standard pharmaceutical website (non-toggle functionality), let's take a look at Lipitor as an example. A search for 'cholesterol medication' in English usually brings a user to LIPITOR's branded websites (non-toggle) within the first results page.

At first glance, it looks the same as the English version, but with more in-depth analysis, it lacks certain relevant information or data that is hard to locate in Spanish. For example, the 'Questions about Cholesterol' section, which is very useful in the English site and something the young woman may want to share as a caregiver, is not available on the corresponding Spanish site. This is where the advantage of toggle functionality stands out. It allows users to navigate through the Spanish pages and directly reference the English translation at any point in the user experience.

In contrast, a further search for cholesterol medications would steer the user towards AstraZeneca's CRESTOR's webpage (with toggle functionality). Among the various prescription branded websites analyzed, CRESTOR was the only site with the toggle functionality feature. The CRESTOR branded website has a clearly delineated button to take you to the Spanish site.



The 'En Español' link at the top will take the user to the LIPITOR Spanish site.

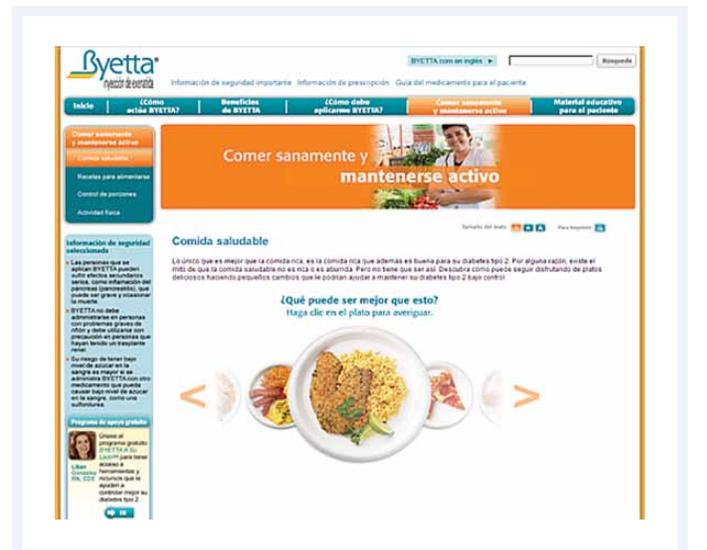


Once there, the Spanish site is culturally adapted with tailored, in-language content to address issues relevant to the Hispanic population. As a comparison to Figure 31 in Figure 32, both the environment and content have been tailored to the Hispanic population and are different from the English site.



CRESTOR's toggle functionality allows the user to toggle directly between the Spanish and English pages (which are mirror images of each other), allowing a Hispanic user to easily communicate in their language of choice. Clicking the "English here" link does not lead to the main English site (Figure 31), but rather to a site that is a English version of the culturally tailored Spanish page, as seen above. Consequently, by providing an easy switch between the exact same page content in the two languages, toggle functionality will help this caregiver better understand various aspects of cholesterol management and then allow her to relay that information back to her grandmother

AMYLIN and Eli Lilly's BYETTA also have websites for Hispanics. While they have similarly useful content and features for Hispanics that CRESTOR's Spanish site has (including educational videos, and diet and exercise recommendations tailored for a Hispanic audience), they fall short in the ability to move from one language to another as the toggle functionality would feature.



Proven roadmap for deploying an online initiative for the ethnic market

At Global, we recognize that many pharmaceutical brand marketers may be intrigued by online strategies for other cultures, but may not be sure how to effectively develop and implement these initiatives. Effectively designing and launching an ethnic online initiative requires alignment between the organizational and brand messaging.

When developing a successful initiative, we ensure strategic and tactical alignment by applying a systematic, five (5) step process to our campaign development and site architecture. However, before beginning to develop an in-language web strategy for a client, our approach carefully considers comparability – how similar the ethnic online program is to a client's corresponding general-market program and then the required maintenance of the site. These two dimensions can mean the difference between success and failure, in both the short and long term. While it may seem that comparability and maintenance are quite disparate, they are in fact inextricably interconnected.

In order to develop an ethnic communications program online, it is often best to take do so in phases and evolve it over time, ensuring that each phase augments the consumer experience and provides value to its users.

For example, Hispanic online users, regardless of language preference, tend to access both the English and Spanish versions of a branded website. Hispanics exhibit this online behavior for a multitude of reasons, including:

- Wanting to compare whether the Spanish and English sites offer a similar experience
- Serve as a means to ensure understanding by checking both languages
- Family bilingualism: members of a Hispanic household may access the Web together, but each may have different language preferences

As Hispanics who are online move between a general-market and the corresponding Spanish-language site, they may systematically identify their relative worth to an organization based on the perceived value of the experience they receive in Spanish. As such, it is important to consider comparability between the Hispanic and general-market sites in terms of:

- Information architecture
- Visual design
- Features and functionality
- Depth and breadth of content

However, it is essential to note that executing on comparable communications does not necessarily mean a brand has to provide identical, one-to-one Hispanic and general-market online experiences. Rather, it is far more beneficial to offer experiences that are perceived to be of equal or even greater value to ethnic audiences.

Based on our experiences, we at Global have been able to dimensionalize what may be valuable to an ethnic user by leveraging our proprietary research, which defines user needs, and how they may differ from those of their general-market counterparts. We further enhance these findings with project specific user research, which we then validate through usability testing once we have launched an ethnic market online program.

Cross-cultural users generally feel loyalty to companies and organizations who demonstrate similar loyalty to their respective market. One manner in which a brand can demonstrate its commitment to these segments is by providing comparable in-language and general-market experiences. But, for comparability to remain effective, brands needs to be able to consistently deliver over time. The best way to achieve this is by developing a maintenance plan prior to implementing an ethnic program online.

When developing a maintenance plan during the early stages of an online program, we recommend outlining the appropriate budget and resources necessary to properly support and evolve the market's online presence. As part of our recommended maintenance plan, we would consider:

- Content updates
- Technology requirements
- Enhanced features and functionality
- Legal reviews and approval processes

It is also important to develop maintenance plans that address the interdependencies among the in-language site, the general-market site, and other ongoing marketing efforts. Consequently, it is also necessary to consider when, for example, the general-market site is updated, and how those updates will be reflected in the in-language site. From a marketing perspective, it is important that the in-language site be aligned with a brand's other online and offline marketing efforts.

Furthermore, the notion of comparability is fixed in time. A general-market site and an in-language site may be comparable one day, but as one site evolves, the other site will quickly lose its comparability without a proper maintenance plan in place. As such, our best-practice principles of comparability and maintenance are entwined, as it is difficult, if not impossible, to maintain a comparable in-language user experience without a proper maintenance plan in place.

Once comparability and maintenance are defined, we focus on information architecture. In our experience with in-language website development projects, marketers focus too much on the visual aspects of their website before they put any thought into the structure and information flow. By placing more emphasis on the information architecture at the beginning of the development process, we believe we can dramatically enhance the sites determined performance metrics. As part of our in-language, site-

build protocol, we have classified five (5) critical steps to building successful site architecture:

1. Strategically Identify In-Language Keywords

- a. We perform a thorough, in-language keyword research study from the outset with the goal of identifying keywords that a target audience may use to find relevant content
- b. Specific or long-tail keywords: very specific search phrases will attract users who are toward the end of their buying cycle and who are ready to convert
- c. Competition: We analyze how competitive the keywords are; highly competitive keywords will be harder to rank for and may cost more to use
- d. Search volume: Keywords that have a high search volume represent a popular search term that many like-minded users are likely to use; we compare similar terms and see which is the most popular; as we go through an in-language, keyword research study, we learn more about potential visitors, what they may be looking for, and their specific wants and needs

2. Map the Keyword Space

- a. Categories will emerge from the in-language, keyword research identifying different subsets of a brand's products or services, or information that potential customers would find useful; those keyword groupings or categories help us to identify relevant pages of content we will want to build into your structure
- b. As we map the keywords we plan to use to relevant landing pages, we create a fluid connection to content that your visitors are likely to be looking for. This also helps us perform a kind of gap analysis to identify subpages we might have missed

3. Develop Your Site Architecture

- a. The next step is to build out the architecture of the site by

building a site map, which provides a hierarchical representation of the site and all of its levels and pages

4. Wireframe Prototyping

- a. Once we have a solid structure that outlines the site's content and maps it to relevant keywords, we begin to develop the wireframe for each page representing the content, as well as the navigation tools for the different pages on the site
- b. We take this a step further by converting the wireframe into a "clickable prototype," which is a website that incorporates the wireframe with clickable navigation and links to get a feel for how the website will behave and operate. This is a good practice, especially for in-language sites to work out the information flow and usability issues

5. Content Development

- a. The final step is to build into the wireframe the actual content for each page
- b. To bring this full circle, we ensure the content uses the keywords that we have mapped for each page, including using the keywords in the body copy, text links, video and image tags, etc. This is not only a part of SEO best practices, but more importantly, it bridges the searcher's expectation to relevant content on the site. Therefore, when your visitors arrive on the site, they will feel they have landed at the right place

Conclusions

1. The current online presence of the pharmaceutical industry must evolve from a simple PDF-based disbursement of printed materials to interactive multimedia tools. In order to stay competitive, pharmaceutical companies will have to upgrade their online marketing initiative providing a comprehensive set of online assistance tools for patients and healthcare providers (HCPs).
2. Ethnic market segments in the U.S. constitute some of the fastest growing and most lucrative target audiences. For this reason, digital marketing of pharmaceutical products must become a part of communication efforts.
3. Successful tool-based online marketing to ethnic market segments will require a high degree of cross-cultural competency and non-trivial cultural adaptation of pharmaceutical web presence.
4. Working with an agency partner that has proven experience with in-language website development projects facilitates the process and helps to ensure success.

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