

Agenda

Introduction and Background

Key Findings

Innovation Examples

Discussion & Next Steps

Appendix



Competitive Analysis

INTRODUCTION AND BACKGROUND



WHAT IS A COMPETITIVE AUDIT AND WHY DO WE DO IT?

What is it:

- A Competitive Analysis compares a website against its business competitors to analyze its ability to motivate actions and reinforce brand equity

Why do we do it:

- A Competitive Analysis judges a site's relative position amongst its competitors, and identifies strategies to pre-empt them



METHODOLOGY

- We evaluated ZyrtecProfessional.com and its mobile site against the objective of driving sustainable competitive advantage through unique claims and trial, across all target segments
- We defined leading functionality through a gap analysis, where we catalogued the functions, content areas and brand execution elements of ZyrtecProfessional.com and then evaluated if these elements exist within the competitor sites
- We also reviewed secondary research and site traffic through weblogs



THIS DOCUMENT INCLUDES

- Analysis of Key Findings
- Detailed findings and individual analyses of the following approved competitive set:
 - Allegra
 - Claritin
 - Xyzal
 - Clarinex
 - Colgate Professional
 - Crest Professional
 - Science Diet
 - Wildcard: Bausch & Lomb For Eye Care Professionals (www.bausch.com/en/ECP)
- Thought Starters for a next generation ZyrtecProfessional.com



Competitive Analysis

KEY FINDINGS



LEADS

ZP.com leads amongst direct competitor HCP sites

- Content Leads
 - Some competitor sites only develop HCP as weak subsection of consumer site
 - Competitor research offerings are generally more basic and targeted more for consumer audience
- Technology Leads
 - ZP.com has the most robust mobile offering
 - ZP.com offers more interactive content and the most robust Trial ordering functionality



Key Findings

WEBLOG ANALYSIS ATTENTION SHARE DATA

Click on image below to view



GAPS

However, ZP.com substantially lags specialty sites in other categories that attempt to 'own' their topic

- Content Gaps

- 'Topic owner' sites have sophisticated content on current research, patient education materials, patient psychographics and practice management
- Online ordering, while often a separate site, better integrates with HCP's office workflow

- Technology Gaps

- 'Topic owner' sites have substantial depth in multimedia (video, podcast) reference materials
- Employ interactive tools either to generate practice-branded patient takeaways or for use in clinical diagnosis/treatment



Key Findings

WEBLOG ANALYSIS GOOGLE ANALYTICS

Analyzing ZP.com's weblogs using Google Analytics reveals

- Mostly new users, but substantial repeats (30%)
 - 10% on mobile devices (mostly Apples)
- Except for Trial, site content does not match user needs
 - 50% drop off in <1 minute, but almost 50% stay 2 minutes or more
 - Most users exit from the Homepage or the Order process
 - Other pages rarely visited
- Referral patterns suggest beefing up SEO program
- See Appendix for detailed findings



Key Findings

PSYCHOGRAPHIC AND BEHAVIORAL ANALYSIS

Review of Manhattan Research reveals online behaviors and attitudes

- Targets are online a substantial amount of time, and want to integrate online into their workflows
 - 30% on smart devices overall; are online during and between patient consultations (50-75% use smart devices)
 - Interested in viewing: apps/QR codes via smartphone, podcasts (particularly live/interactive by KOLs), video/videochat, articles, product updates and showing patients info via tablet
- Targets have trust barriers around PharmaCo content, but also levers
- See Appendix for detailed findings



RECOMMENDATIONS

- Increase content sophistication to 'own allergy education category'
 - Must rival existing professional association content to be taken seriously
 - Could start with any sub-vertical: Patient Education, Professional Education or CME
- Increase dialogue with each target by creating functionality that addresses their specific workflow needs
 - Develop modules that facilitate HCP-Patient interaction
 - Opportunity: exploit smart devices (Phone, iPad) as delivery method
 - Link and push channels through website
- Increase interactive elements when developing new content



Individual Competitors



Direct Allergy Competitors



ALLEGRA

- Separate HCP site attempts to address HCP needs
- Contains product descriptions, efficacy claims and light study data
- Ability to order samples but form has no logic behind it so anyone could place order
- 'Download center' has drug labels and a non-working link to a 'patient brochure'
- Appropriate tone with uninspiring branding
- Rudimentary mobile site
- Valid competitive response but still lags zp.com



Detailed Findings – Individual Competitors

ALLEGRA ILLUSTRATIONS

Allegra® Allergy 24 Hour

Relieves:

- Sneezing
- Runny nose
- Itchy nose or throat
- Itchy, watery eyes

Drug Facts Label for Allegra® Allergy 24 Hour

Allegra® Allergy 24 Hour	Allegra® Allergy 12 Hour
Duration of relief:	24 hr
Age:	12 yr+
Dosage Form:	Tablet
Active Ingredient:	180 mg fexofenadine HCl
Sedation Warning:	None
Directions:	• Take 1 tablet with water once a day; do not take more than 1 tablet in 24 hours
Notes:	<ul style="list-style-type: none"> • Adults 65 years of age and older: ask a doctor • Consumers with kidney disease: ask a doctor • Do not take at the same time as aluminum or magnesium antacids • Do not take with fruit juices • For complete Directions, Warnings, and Other information, click on the Drug Facts Label icon above

Product data only
reiterates package labeling

Research data
moderately robust

ONLY Allegra® combines fast, non-sedating, 24-hour, indoor/outdoor allergy symptom relief*

Allegra® (fexofenadine HCl) is a powerful, non-sedating antihistamine that delivers 24-hour relief from allergy symptoms including sneezing; runny nose; itchy, watery eyes; itchy nose or throat.

Through day and night, Allegra® provides relief from allergic rhinitis symptoms for a full 24 hours.

Allegra® 24-Hour Symptom Relief with Once-Daily Dosing⁽¹⁾
Mean Reduction in Total Symptom Scores (TSS)

Symptom	Allegra® 24-Hour	Other Antihistamines
Sneezing	~0.8	~0.4
Runny nose	~0.8	~0.4
Itchy nose	~0.8	~0.4
Itchy eyes	~0.8	~0.4

The FDA-approved label for Allegra® has no Warnings regarding driving or drowsiness.

*Among OTC branded antihistamines. Refers to 24-hour Allegra® Allergy for adults. Starts working at hour one. Applies to first dose only.

Sign Up for Samples

Please confirm your shipping information below to receive samples.

Shipping/Practice Address

*Required Field

*First Name: *Last Name:

*Address 1: Address 2:

*City: *State: *ZIP Code:

*License Number:

*E-mail:

By providing your e-mail address and clicking the Submit Button you agree that the information you provide may be used by Chatterm, Inc. and its business partners to contact you. Personal identifiable information will not be sold to any third party. In some instances it may be made available to companies working for Chatterm, Inc. which have agreed not to disclose this information. To learn more, see the Chatterm, Inc. [privacy policy](#).

Allows anyone with a license
number to sign up; no validation

Patient brochure link doesn't work

Download Center

[Drug Facts Labels](#)

[Patient Brochure](#)



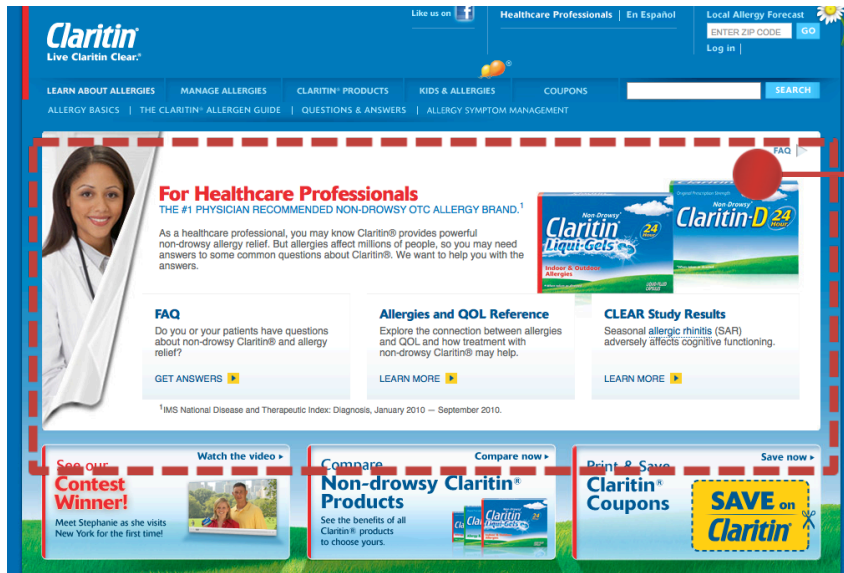
CLARITIN

- Rudimentary HCP site is merely 2 interior pages of the Consumer Site
- Contains FAQs, Send to a Friend function, and 1 research pdf
- No separate branding from consumer site gives air of being afterthought
 - Supplied data is very high level and would not serve serious HCP inquiries
 - No ability to obtain samples
- No mobile site
- Not a competitive threat

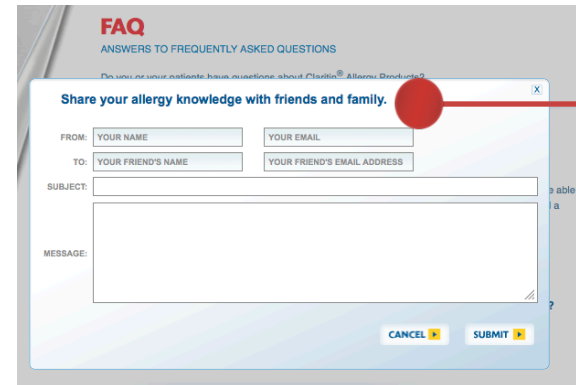


Detailed Findings – Individual Competitors

CLARITIN ILLUSTRATIONS



HCP site is 2 pages within consumer site



FAQs have non-professional 'share with family' functionality

Allergies and QOL Reference

Meltzer EO. Quality of life in adults and children with allergic rhinitis. J Allergy Clin Immunol. 2001;108:S45-S53.

Blaiss M. Current concepts and therapeutic strategies for allergic rhinitis in school-age children. Clin Ther. 2004;26(11):1876-1889.

Very basic study references



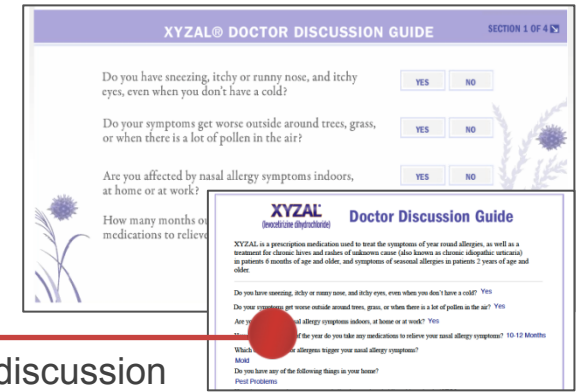
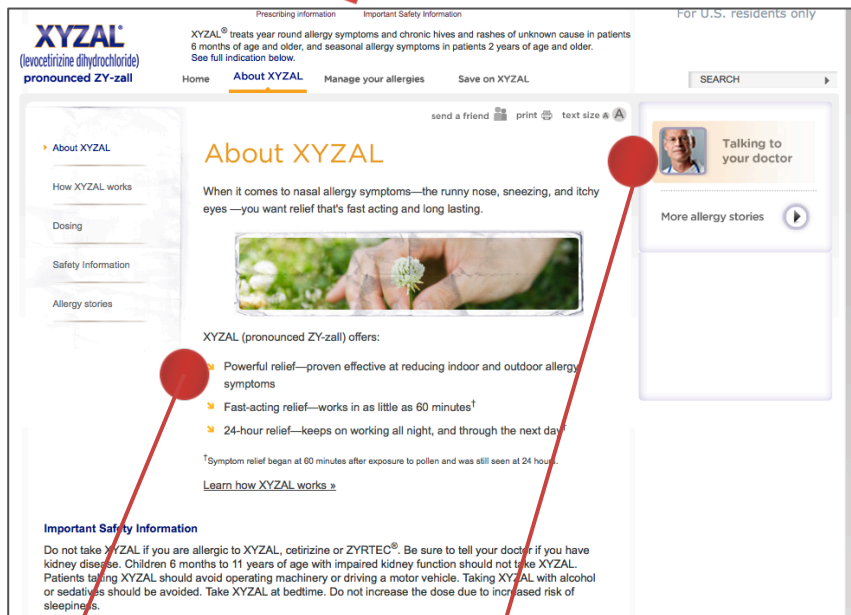
XYZAL

- Rx drug site, but provides information from a consumer's POV, with no separate HCP site
- Prescribing information, 'Manage your Allergies' education section, and interactive questionnaire to form a 'doctor discussion guide'
 - Discussion guide only memorializes answers selected in questionnaire
 - Remainder of site content is static, save for a few educational audio/videos
 - Education content is high-level for consumers, too simplistic for HCP audience
- No ability to order samples; no mobile site
- Education content somewhat on par with MAG materials, otherwise site lags zp.com



Detailed Findings – Individual Competitors

XYZAL ILLUSTRATIONS



“Interactive” doctor discussion guide only provides printout of selected answers

Rx site, but content and tone is geared to consumer, not appropriate for HCP

Educational resources describe category issues in depth and contain video, audio and transcripts



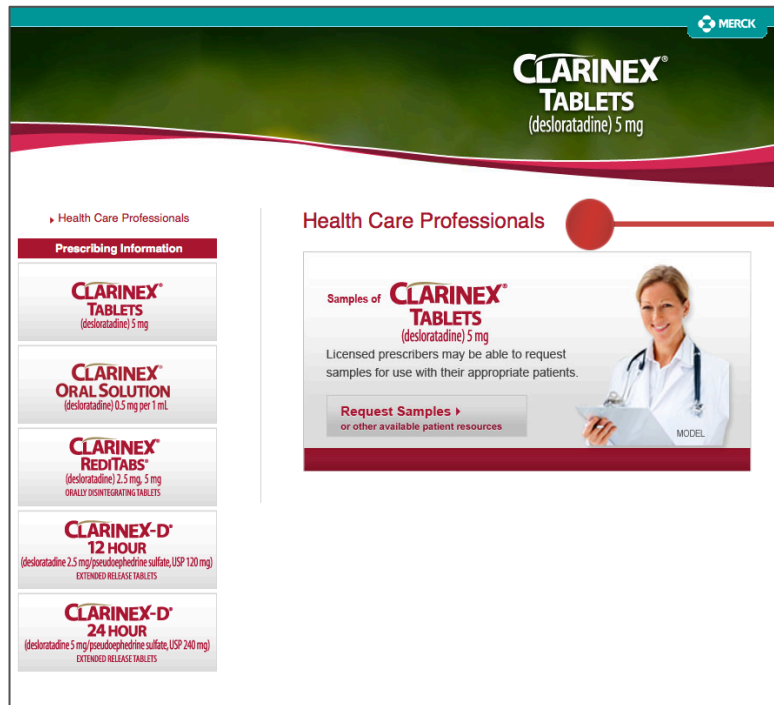
CLARINEX

- Rudimentary, separate HCP site provides only drug labels and link to Merck sample services
- Sample services website provides some content for patient information and educational resources
 - Site for all Merck products, so HCP must pick through to find Clarinex
 - Clarinex materials not available in all categories of resources
 - Provides form/phone to contact 'National Services Center' to speak with live representative
- Mobile site is 'temporarily unavailable'
- Valid competitive response but substantially lags zp.com

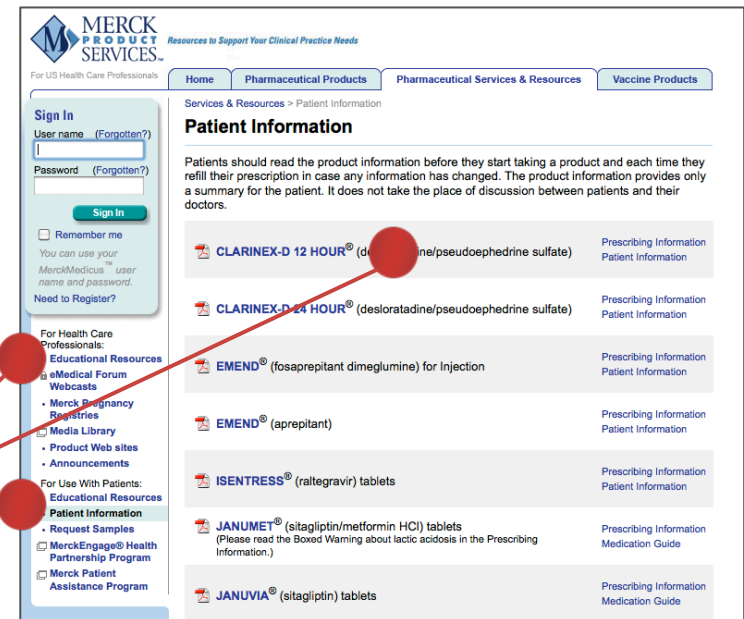


Detailed Findings – Individual Competitors

CLARINEX ILLUSTRATIONS



Very basic site has only label info and link to Merck Services site



Larger Merck Product site has resources and patient info but hard to find Clarinex and content not available for all categories



Analogous Sites



COLGATE PROFESSIONAL

- Branded site attempting to own 'oral health care' education category
 - Associates Colgate with material where ever possible
- High-level Indications section, Patient Education materials, Professional Education materials, Colgate Product details and research
 - Appropriate tone for HCP
 - Patient education content exists across several channels (web/app/embed in practice site) and seems topic appropriate for use in-office
 - Professional education materials provide whitepapers, articles, and links to pro organizations, but debatable whether really sophisticated enough for audience
- Contains some technological competitive leads
 - Provides some additional content by specialty through self-identification @ signup
 - Provides 'My favorites' area to save items of interest
 - Lets users custom publish content to email, print or embed on their practice site



Detailed Findings – Individual Competitors

COLGATE PROFESSIONAL ILLUSTRATIONS



Provides some additional content based on user's self-identification at sign-up

► View content and resources just for [students](#)

Substantial professional education materials, but debatable if really robust enough HCP needs

Publish this Content

Share this content with your patients or add to your website.

How do you want to use this content?

- ☐ Create an HTML e-mail
- ☐ Create a print piece
- ☐ Add this to your website

» NEXT

The next step will help you set up the design, and output specifications for this item.

[Need help?](#)

My Favorite Resources

Click to remove

Patient Education Interactive Guides



[Whitening Evaluation](#)

Patient Education: Interactive Guides



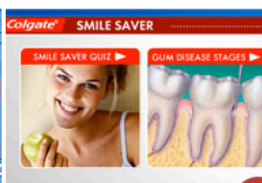
Guide: Fresh Breath Assessment
How fresh is your breath? Find out by visiting the Fresh Breath Institute.

- [View this guide](#)
- [Add this guide to your website](#)



Guide: Guide to Brushing
Test your brushing ability using our helpful animated 3-D guide.

- [View this guide](#)
- [Add this guide to your website](#)



Guide: Smile Saver
How much do you really know about gum disease? Take our quiz and see.

- [View this guide](#)
- [Add this guide to your website](#)

Users can save to 'favorites' and custom publish content

Patient education content seems most aligned with HCP practice needs



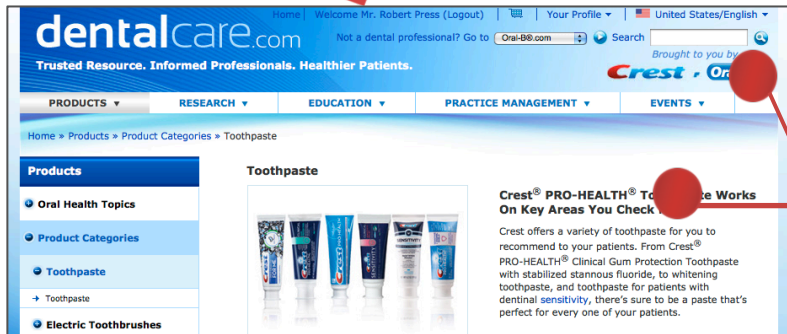
CREST PROFESSIONAL (DENTALCARE.COM)

- Also attempts to own 'oral health care' education category
 - However, only 'presented by' brand and not heavily branded throughout
- Product info by category and by health topic, large research database (articles + media library), Patient Education materials, Professional Education materials (including large CME component), practice management materials, events/conferences schedule and Shop Products
 - Research database is very robust and could be appropriate for HCP audience
 - P&G is accredited CME provider, so can offer courses through site
 - Robust practice management section provides detailed business planning guides
- Contains some technological competitive leads
 - CME 'dashboard' to organize courses and complete assignments
 - Can brand patient education materials with practice info
 - Offers credit terms and tiered pricing by order-volume in Shop



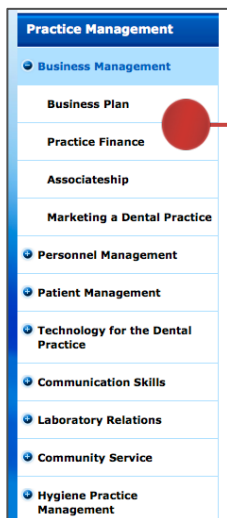
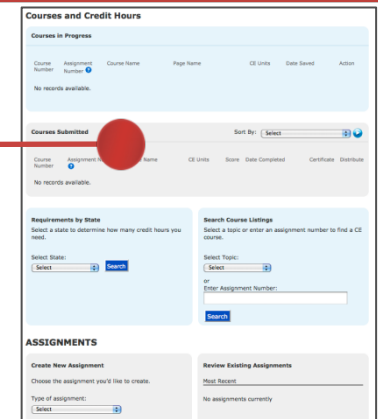
Detailed Findings – Individual Competitors

CREST PROFESSIONAL ILLUSTRATIONS



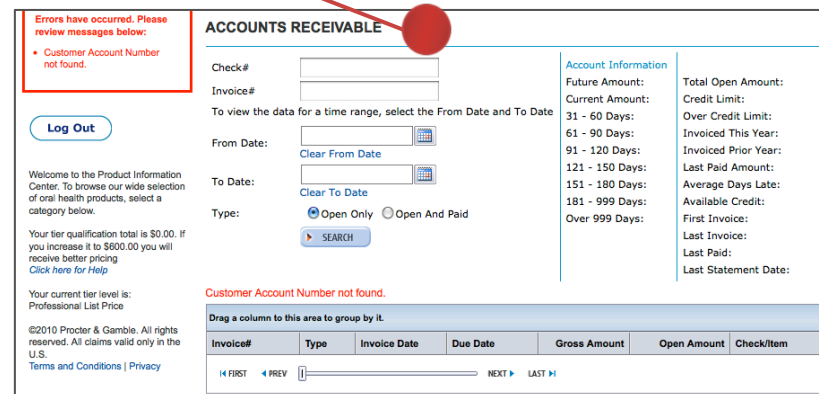
Brand only appears in header and on product pages

CME provider with dashboard

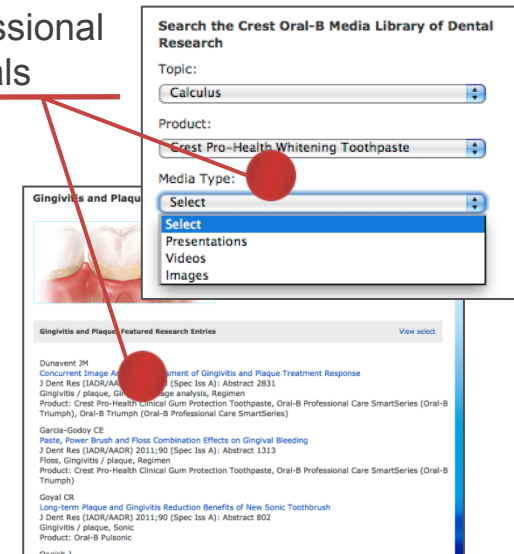


In-depth, substantial how-to's on running a practice

Shop offers credit, maintains accounting and provides tiered pricing



Robust multi-media patient and professional education materials



SCIENCE DIET (HILLSVET.COM)

- Attempts to own 'pet health care' education category
 - Lightly associates brand throughout and heavily in product areas
- Product info by category, disease or species; large article database, pet owner materials, Professional Education materials (including CME), practice management materials, and events/conferences schedule
 - Buckets targeted content by provider type (vets, technicians, students) but then also allows for search by topic; information architecture may be confusing
 - Ordering via separate linked site
 - Practice management provides detailed business planning and training tools
 - Substantial social media (facebook, twitter) presence
- Leads zp.com substantially in content depth and somewhat technologically
 - Provides live phone/email consultation services
 - Downloadable Feeding Guide Software that also generates Client takeaways



Detailed Findings – Individual Competitors

SCIENCE DIET ILLUSTRATIONS

Provides bucketed content by provider role

Veterinarians	Veterinary Technicians	Students	Specialists	Clinic Managers	Front Desk
Recommendations and research to help your practice.	Essential information and resources.	Information and guidance to help get your career started.	Key support for your practice.	Practical assistance for business operation.	Tools and tips to serve your clients.


Very robust professional and pet owner education materials

Social media strategy, but may only work for this category

"Like" Hill's on Facebook

- ✓ Receive news and updates
- ✓ Share special offers with clients
- Find stories to share on your clinic's Wall

[Join us today](#)



Refine Your Search

Showing 1-15 of 386 results

By Disease/Condition
Select

By Sub Disease/Condition
Select One

By Publication Type
Select Type

By Sub Publication Type
Select One

By Product
Select Family

GO

Client Information Series

The Hill's Client Information Series is a compilation of client handouts prepared for each of the medical problems listed in the [Hill's Atlas of Veterinary Clinical Anatomy](#). Each client handout is prepared to reinforce your exam room instructions. Content ranges from medical problem descriptions and illustrations to home care instructions, pet health risk management help and promotional opportunities for you and your clinic.

Although these materials are protected by copyright, we encourage you to make copies solely for distribution to your clients. We specifically designed the Client Information Series to be available online to make distribution easy and to allow you to quickly access updated materials.

Cardiovascular and Lymphatic System

- Canine Dilated Cardiomyopathy
- Canine Lymphosarcoma
- Chronic Valvular Disease
- Feline Dilated Cardiomyopathy
- Feline Hypertrophic Cardiomyopathy
- Feline Lymphosarcoma
- Heartworm Disease

Cognitive Dysfunction

Digestive System

Integumentary System

Musculoskeletal System

Parasite Life Cycles

Preventative Health Care and Administering Medication

Respiratory System


Special Senses

Urogenital System

Downloadable software creates Pro dispensing instructions and Owner takeaways

Hill's™ Feeding Guide Software

Customize patient feeding instructions quickly and easily



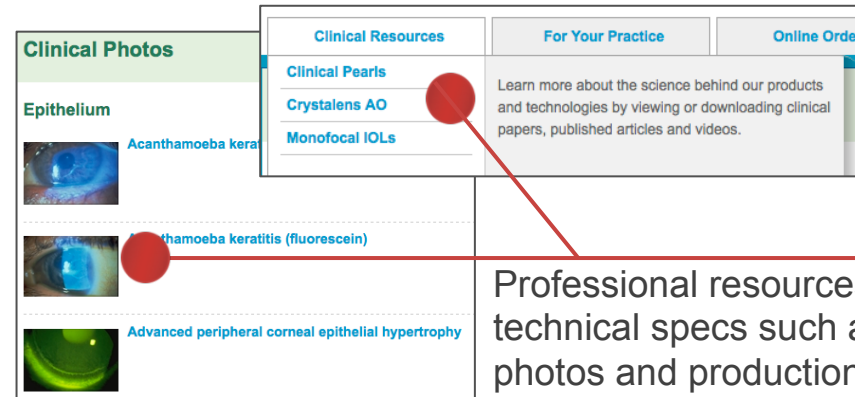
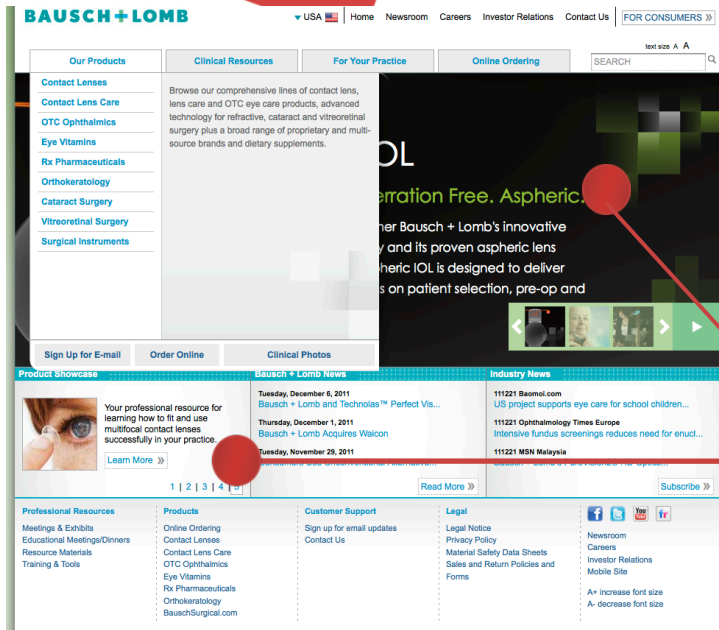
BAUSCH & LOMB

- Attempts to own 'eye care' product category
 - Associates brand throughout and emphasizes technical specifics
- Product info by category with technical specs section, practice management materials with tools/calculators, patient insights, events/conferences/education schedule, online ordering
 - Focuses on technical specs for pros, light on patient takeaways
 - Ordering via separate linked site
 - Patient insights microsite has articles on behavior and psychographics
 - Ordering microsites can link into Pro's office workflow
- Leads zp.com substantially in content depth and somewhat technologically
 - Focus on specs casts Company as technical leader with appropriate tone
 - Interactive calculators for use in diagnosis and lens determinations



Detailed Findings – Individual Competitors

BAUSCH & LOMB ILLUSTRATIONS



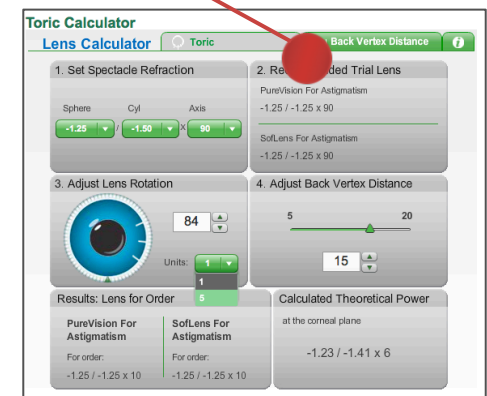
Professional resources focuses on technical specs such as clinical photos and production technology

Branding, tone and visual design emphasize technical leadership

Interactive tools for use in patient diagnosis and lens creation



'Insights' microsite provides patient psychographics



Competitive Analysis

THOUGHT STARTERS



thought starters # 1

USE MOBILE TO LEVERAGE CONTENT SOPHISTICATION



HCPs trust independent, professional organizations' sites more, and are more likely to use them first for research purposes. ZP.com must rival this level of quality to become a trusted resource, but can specialize in particular tasks, such as patient education

ZP.com can exploit gap that this data is rarely provided in smart-device form. Create downloadable apps that provide portable content. Personalize by sign-up specialty.




thought starters # 2

INCREASE DIALOGUE THROUGH ORDER FLOW INTEGRATION

Order Free ZYRTEC® Samples & Resources

Please select from the

☒  Use only as directed

TRACK AN ORDER

Order Number:

Your Purchase Order #:

To search for a specific order enter either the Order Number or the PO Number.

From Date: To Date: Desc ☒

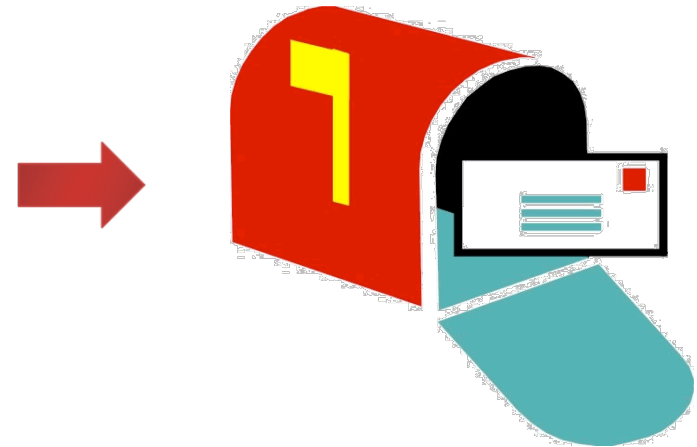
To search for all orders placed during a specific time period enter the From Date

[Clear From Date](#)

Contact Lens and Lens Care Ordering

Click here for the [Contact Lens and Lens Care Online Ordering System](#). you'll get:

- Real-time inventory status.
- Automatic order confirmation on-screen.
- The option to receive your order confirmation via e-mail.
- Option to ship orders to your office or directly to your patients.



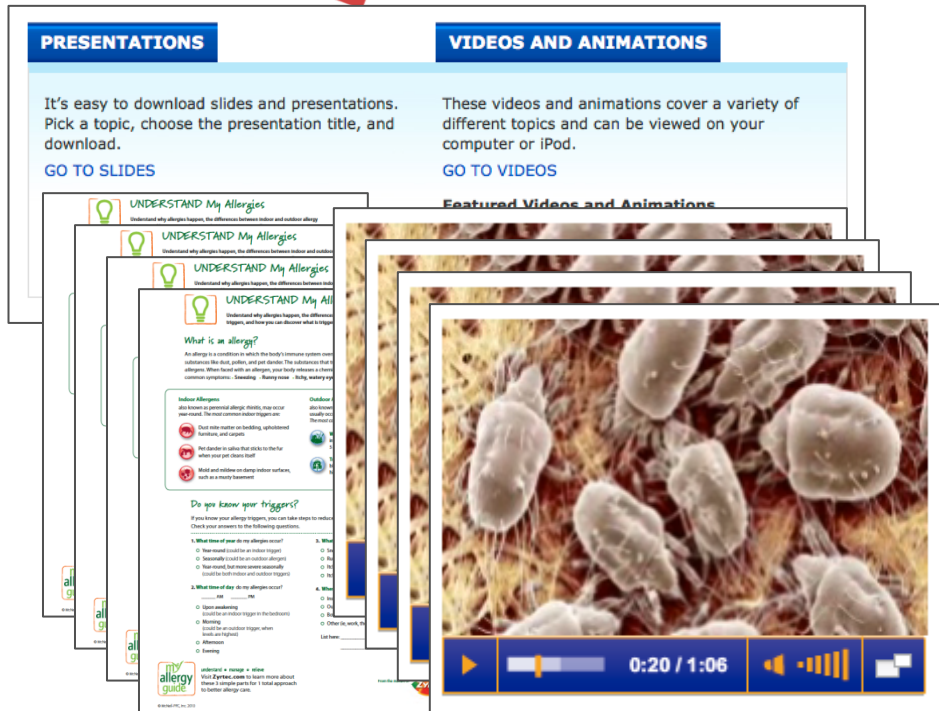
Leading competitors more tightly integrate their order fulfillment site to HCPs' practices. Ability to send samples to HCP or patient and to track orders.

Opportunity to up/cross-sell to patient through mail distribution of samples



thought starters # 3

INCREASE INTERACTIVE ELEMENTS IN NEW CONTENT



HCPs indicate they are interested in using tablets to show patient info during consultations or view live, interactive podcasts with KOLs. However, most education materials are static, printed pdfs or embedded video on websites.

Create iPad apps to mobilize data into the consultation setting or aid with CME



Competitive Analysis

DISCUSSION & NEXT STEPS



Competitive Analysis

APPENDIX



WEBLOG ANALYSIS GOOGLE ANALYTICS

While meeting the prime success criteria of driving to Trial, remainder of site is rarely used and indicates content not matching target needs

- About 300 visits/day, consistent for past year, with spikes around email campaigns
 - 70% New Visitors, 30% Repeat (of which half come >4 times)
 - 10% using mobile devices (40% iPhone, 20% iPad, 35% other phones)
 - Traffic peaks on Monday then declines through the week
 - >97% USA traffic in English, almost all on broadband
 - 70% IE, remainder split evenly over FF, Safari, Chrome and Android
- Referrals equally split among Search (75% organic/25% paid), Referral (50% consumer site, 50% emails), Direct Type URL and Campaigns
 - Suggests beefing up SEO program more



WEBLOG ANALYSIS GOOGLE ANALYTICS (CONTINUED)

- 46% leave < 1 minute, indicating site poorly meets user needs, but 50% stay 2-10 minutes
- Most visited page: Homepage (20%), order process (sums ~50%) and 25% remainder of site
- However, most exit from Homepage (33%) and order process (33%)
 - Only other content page that is visited in any amount is dosing (5%), which is also a large exit page
 - Indication again that except for Trial, site content does not match user needs



PSYCHOGRAPHIC AND BEHAVIORAL ANALYSIS

Review of Manhattan Research reveals online behaviors and attitudes

- All HCPs
 - Professionally spend ~11 hours/week online
 - 30% on smart devices overall; most don't own tablets yet (but plan to)
 - Are online during and between patient consultations (50-75% use smart devices)
 - Often viewing drug reference DBs, treatment guides, portals, eCME
 - CME very influential on clinical decisions, distrustful of PharmaCo content
 - Interested in viewing: apps/QR codes via smartphone, podcasts (particularly live/interactive by KOLs), video/videochat, articles, product updates and showing patients info via tablet
 - Concerned with liability when communicating with patients online



PSYCHOGRAPHIC AND BEHAVIORAL ANALYSIS

Specialist categories have some particular needs/barriers

- Nurses
 - Look more for education materials for patients and selves
 - Tend to trust/go to PharmaCo websites more
- Allergists
 - Pay special attention to offline journals and conferences
 - Interested in portal sites about a category for an HCP audience
 - Want to be able to customize deliverable content for specific patient
 - Skew to a slightly older, less 'plugged-in' demographic than other HCPs

