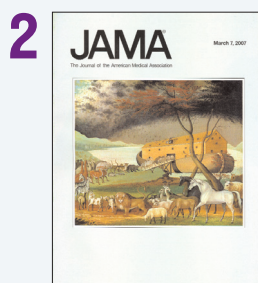


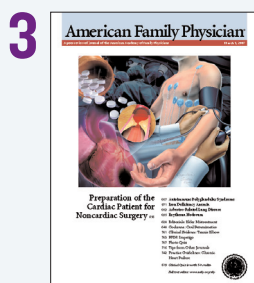
TOP 5 Medical/surgical journals in 2006, ranked by advertising revenue



1 New England Journal of Medicine
— ad pages down 2% vs. 2005



2 Journal of the American Medical Association
— ad pages down 14% vs. 2005



3 American Family Physician
— ad pages down 13% vs. 2005



4 Medical Economics
— ad pages down 14% vs. 2005



5 American Medical News
— ad pages up 11% vs. 2005

Total ad pages for the top 5 journals down 7% vs. 2005

ON THE LEVEL

Medical/surgical journal publishers must wait a little longer to break out from the pattern of flat revenues. PERQ/HCI's **Eugene M. May** reports on the biggest advertisers, products and categories of 2006

After showing virtually no growth in medical/surgical spending during the first six months of 2006, PERQ/HCI's Journal Ad Review reported a slight boost during the second half of the year that resulted in a full year 2006 increase of 2% over 2005. On an ad page basis, the gain was 1%. While both dollars and pages were up, the figures show that journals have yet to stage a strong break-out from the marginal gains observed in recent years—since 2000, year-on-year ad spend has remained relatively flat (see chart on page 52).

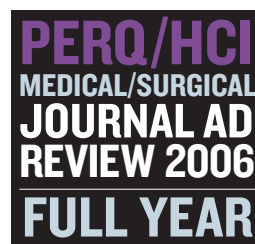
A review of the top five medical/surgical journals (ranked by dollars) indicates that only *American Medical News* registered an increase in ad pages (up 11%) and with the exception of *New England Journal of Medicine* (down 2%), the other three publications had double digit declines when compared with the year-ago period. Overall, total ad pages for the top five journals declined by 7% when 2006 is compared to 2005 and their share of all medical/surgical ad pages fell from 13.2% to 12.3%.

The leading advertisers

Pfizer was clearly the number one advertiser in medical/surgical journals during 2006 as share of spending topped 11% following a 16% boost in ad outlays. Among the six Pfizer products that spent at a rate to place them in the top 25 was Chantix, a new smoking deterrent agent. Wyeth moved up one spot to 2nd place due largely to higher ad expenditures for Effexor XR which was the most heavily advertised product.

A 71% increase in spending advanced Merck from 9th to 3rd following the introduction of two new vaccines, Gardasil and Zostavax, and Januvia, a once-daily pill for type 2 diabetes. Forest dropped from 2nd to 4th following a reduction in ad outlays for Namenda, Campral and Combunox while Lilly slipped from 4th to 5th following an 18% cut in spending for Cymbalta.

There were six companies that were new to 2006's top list including Takeda which climbed from 26th to 6th as ad outlays were increased for their insomnia preparation, Rozerem, and Novo Nordisk which



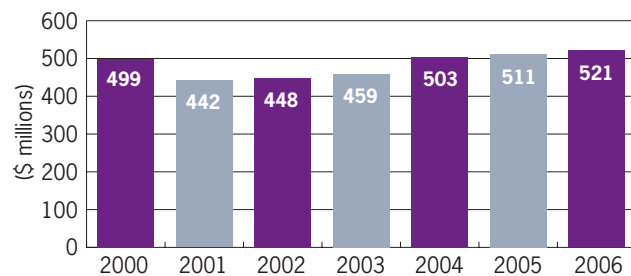
increased spending for NovoLog 70/30 and also placed considerable ad support behind Levemir, a new long-lasting basal insulin (27th to 7th). AstraZeneca dropped from 5th to 8th following ad reductions on a number of key products, Novartis advanced from 12th to 9th as spending increased by 56% and Sanofi-Aventis fell from 6th to 10th due largely to lower expenditures for Ketek.

Bristol-Myers Squibb advanced from 14th to 11th following a 58% boost in spending due to relatively new introductions like Emsam (for depressive disorders), Orenca (for severe rheumatoid arthritis) and Baraclude (for hepatitis B virus).

Janssen Pharmaceutica edged up from 13th to 12th, GlaxoSmithKline dropped from 8th to 13th after reducing ad outlays by 31% and Sepracor fell from 11th to 14th as expenditures declined by 19%. Abbott Laboratories' advance from 22nd to 15th was driven largely by Humira and Tricor.

Cephalon, new to the top 25 jumped from 31st to 18th following higher advertisement outlays for Provigil and OraVescent (non-branded). Others new to the top group were the Bristol-Myers Squibb/Otsuka partnership, up from 32nd to 20th as ad spending

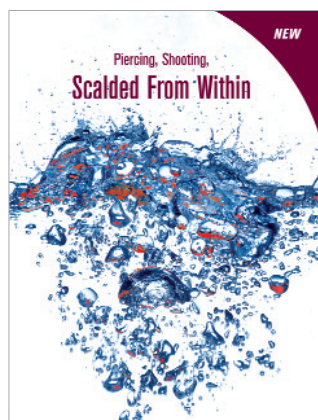
Medical/surgical journal ad spend 2000-2006



Source: PERQ/HCI

increased for Abilify, an antipsychotic agent, Sanofi Pasteur, which promotes the Adacel vaccine, up from 37th to 23rd and the Amylin/Eli Lilly partnership (24th) that markets Byetta for type 2 diabetes.

Companies no longer in the top 25 include the Merck/Schering-Plough joint venture that promotes Vytorin and Zetia, down from 7th



MOST ADVERTISED COMPANY

Pfizer was once again the runaway leader in medical/surgical journal ad spending during 2006, accounting for more than 11% of the market. The company boosted its ad outlays by 16%, and had six products in the top 25 most advertised brands: Lyrica, Caduet, Lipitor, Celebrex, Detrol LA and Chantix (its new smoking deterrent agent). Wyeth moved up to 2nd place due to massive promotion of Effexor XR, while Merck leapt to third place on the back of launch ads for Gardasil, Zostavax and Januvia.

TOP 25 ADVERTISED COMPANIES, 2006

Rank	Rank		\$ ad spending			% change	
	2005	Company	2006	2005	2004	2006 vs 2005	2005 vs 2004
1	1	Pfizer Laboratories	58,837	50,939	72,212	15.5	-29.5
2	3	Wyeth Pharmaceuticals	33,082	20,357	13,840	62.5	47.1
3	9	Merck	19,191	11,246	10,057	70.6	11.8
4	2	Forest Pharmaceuticals	19,162	36,998	34,808	-48.2	6.3
5	4	Eli Lilly & Company	17,344	19,200	17,701	-9.7	8.5
6	26	Takeda Pharmaceuticals America	13,850	3,841	0	260.6	NA
7	27	Novo Nordisk Pharmaceutical	13,294	3,630	3,979	266.2	-8.8
8	5	AstraZeneca	12,295	16,867	19,653	-27.1	-14.2
9	12	Novartis	12,195	7,840	11,942	55.5	-34.3
10	6	Sanofi-Aventis	11,912	16,585	14,292	-28.2	16.0
11	14	Bristol-Myers Squibb	10,472	6,609	4,582	58.4	44.2
12	13	Janssen Pharmaceutica	10,022	7,809	8,716	28.3	-10.4
13	8	GlaxoSmithKline	8,761	12,672	16,197	-30.9	-21.8
14	11	Sepracor	8,501	10,473	993	-18.8	955.0
15	22	Abbott Laboratories	8,431	4,509	6,147	87.0	-26.7
16	10	Ortho-McNeil Pharmaceutical	7,203	10,740	11,712	-32.9	-8.3
17	18	Amgen	6,419	4,919	6,318	30.5	-22.1
18	31	Cephalon	6,307	3,119	3,713	102.2	-16.0
19	24	Pfizer/Boehringer Ingelheim	5,756	4,185	4,033	37.6	3.8
20	32	Bristol-Myers Squibb/Otsuka	5,211	2,835	4,061	83.8	-30.2
21	20	Shire US	5,086	4,827	3,558	5.4	35.7
22	19	TAP Pharmaceuticals	4,789	4,871	5,193	-1.7	-6.2
23	37	Sanofi Pasteur	4,630	2,384	792	94.2	201.1
24	2257	Amylin Pharmaceuticals/Eli Lilly	4,189	4	0	105,779.5	NA
25	16	Boehringer Ingelheim	4,083	5,717	3,496	-28.6	63.5

Source: PERQ/HCI Journal Ad Review

ON THE LEVEL: JOURNAL AD REVIEW

to 85th, Roche Laboratories, down from 15th to 30th and the Roche/GlaxoSmithKline partnership that markets Boniva, down from 17th to 42nd. Also, gone from the top group are Takeda/Eli Lilly that promotes Actos, 23rd to 40th; Ortho Biotech which advertises Procrit, 21st to 49th; and Genentech BioOncology/OSI Pharmaceuticals.

Break the cycle
of unresolved depression with EFFEXOR XR[®]

residual symptoms
recur
relapse

EFFEXOR XR[®]
The change they deserve.

MOST ADVERTISED BRAND

Had medical/surgical journal ad spending for Wyeth's Effexor XR remained at 2005 levels, it would still have taken top spot. As it was, outlays increased massively from \$13.7 million to \$25.8 million, accounting for almost 5% of all ad spending. Takeda's relatively new insomnia product, Rozerem, jumped from 21st to 2nd with a 175% rise in ad outlays. Cymbalta retained 3rd place (down 18%).

The leading products

Effexor XR accounted for almost 5% of all ad spending in medical/surgical journals following an 88% boost in spending while Takeda's relatively new insomnia product, Rozerem, jumped from 21st to 2nd following a 175% increase in ad outlays. Cymbalta retained 3rd place, Forest's Namenda slipped from 2nd to 4th as spending was reduced by 29% while Pfizer's Lyrica advanced from 10th to 5th following a 46% increase in ad outlays.

Higher spending for Caduet moved it from 8th to 6th while Lipitor slipped one spot to 7th on a 10% cut in ad spending. Lexapro edged up from 9th to 8th, Janssen's Risperdal climbed from 16th to 9th as ad expenditures increased by 36% and Lunesta dropped from 5th to 10th.

Previously unadvertised in medical/surgical journals were Merck's Gardasil vaccine (11th), Novo Nordisk's Levemir (13th) and Pfizer's Chantix (15th). Byetta, from Amylin/Eli Lilly was 17th, Merck's Zostavax vaccine was 21st, Sanofi Pasteur's Adacel vaccine was 23rd while Pfizer's Detrol LA was 24th.

Previously advertised high-climbers include Abilify, up from 49th to 12th, NovoLog 70/30 (66th to 14th), Humira (90th to 19th), Acomplia (non-branded) (75th to 20th) and Benicar (30th to 22nd). Completing

TOP 25 ADVERTISED BRANDS, 2006

Rank	Rank 2005	Product	Company	\$ ad spending 2006	\$ ad spending 2005	\$ ad spending 2004	% change 2006 vs 2005	% change 2005 vs 2004
1	1	Effexor XR	Wyeth	25,789	13,707	7,276	88.1	88.4
2	21	Rozerem	Takeda	10,473	3,809	0	174.9	NA
3	3	Cymbalta	Eli Lilly	10,452	12,684	6,205	-17.6	104.4
4	2	Namenda	Forest	9,351	13,076	18,755	-28.5	-30.3
5	10	Lyrica	Pfizer	9,344	6,414	0	45.7	NA
6	8	Caduet	Pfizer	9,164	8,424	12,533	8.8	-32.8
7	6	Lipitor	Pfizer	8,611	9,584	9,043	-10.1	6.0
8	9	Lexapro	Forest	7,798	7,400	14,759	5.4	-49.9
9	16	Risperdal	Janssen	6,093	4,477	3,324	36.1	34.7
10	5	Lunesta	Sepracor	5,867	9,973	0	-41.2	NA
11	—	Gardasil	Merck	5,279	0	0	NA	NA
12	49	Abilify/F	BMS/Otsuka	5,211	2,002	0	160.3	NA
13	—	Levemir Injection	Novo Nordisk	5,119	0	0	NA	NA
14	66	NovoLog 70/30	Novo Nordisk	4,766	1,423	1,375	235.0	3.5
15	—	Chantix	Pfizer	4,255	0	0	NA	NA
16	19	Prevacid	TAP	4,203	4,132	1,833	1.7	125.4
17	—	Byetta	Amylin/Lilly	4,189	0	0	NA	NA
18	24	Celebrex	Pfizer	4,094	3,293	3,348	24.3	-1.6
19	90	Humira	Abbott	3,945	1,069	1,293	269.1	-17.4
20	75	Accomplia-NB	Sanofi-Aventis	3,595	1,246	0	188.4	NA
21	—	Zostavax	Merck	3,450	0	0	NA	NA
22	30	Benicar	Sankyo/Forest	3,422	2,620	0	30.6	NA
23	—	Adacel	Sanofi Pasteur	3,388	0	0	NA	NA
24	—	Detrol LA	Pfizer	3,220	0	0	NA	NA
25	23	Reyataz	BMS	3,143	3,317	3,127	-5.3	6.1

Source: PERQ/HCI Journal Ad Review

the top 25 are Prevacid (19th to 16th) even though ad outlays moved up only 2%, Celebrex (24th to 18th), following a 24% increase and Reyataz, down from 23rd to 25th as ad spending was reduced by 5%.

Products missing from the top 25 include two from Forest—Com-bunox and Campral—and two from Merck/Schering Plough—Vytorin and Zetia. Also missing is Topamax (from Ortho-McNeil) and Procrit (from Ortho Biotech). Others dropping out of the top group include Ambien, Boniva, Ketek, Actos, Tarceva and Spiriva HandiHaler.

The leading therapeutic categories

SSRI/SNRI's remained the most heavily advertised drug class as spending increased by 21%. This gain can be attributed to higher ad spending for Effexor XR. Cytostatic Drugs-Other stayed in 2nd place while Antipsychotics-Other moved up from 4th to 3rd due to higher ad outlays for Abilify, Risperdal and Zyprexa. The first of seven therapeutic categories new to the 2006 top 25 was Diabetes-Insulin which jumped from 30th to 4th due largely to Levemir, Byetta and NovoLog while Non-Barbiturates Sedatives slipped from 3rd to 5th.

New to the top group was Vaccines-Other which was driven higher (50th to 6th) by products like Gardasil and Zostavax. Ethical Drugs

Misc.-Other moved up from 11th to 7th, Seizure Disorders stayed in 8th place, Alzheimer-Type Dementia dropped from 5th to 9th due largely to lower spending for Namenda while Cholesterol Reducers Rx-Statins dropped from 6th to 10th following cuts for Crestor and Lipitor.

Calcium Blockers (11th), Antivirals-Other (12th) and Cancer Therapy Products (13th) all moved higher when compared to a year ago while Proton Pump Inhibitors slipped from 10th to 14th due largely to lower ad outlays for Nexium and Crestor. Biological Response Modifiers, new to the top 25, advanced from 29th to 16th as spending was increased for Humira while Morphine & Opium Non-Injectable, also new to the top group climbed from 35th to 18th. Other therapeutic categories that moved into the top 25 were Biologicals-Vaccines (53rd to 21st) due mostly to Sanofi Pasteur's Adacel, UT Antispasmodics (51st to 24th) and a new Smoking Deterrent Rx category (25th).

Drug classes no longer in the top group include Cholesterol Reducer's Rx-Others; Codeine & Combinations, Non-Injectable; Bisphosphonates and Anti-Migraine. Also missing were Specific Antagonists, Interferon and Erythropoietin. ■

Eugene M. May is director of marketing research at ACNielsen HCI

MOST ADVERTISED CATEGORY

The SSRI/SNRI category dominated again, with an 8.5% share of all medical/surgical advertising on the back of a 21% increase in expenditures. This gain can be attributed to significantly higher ad outlays for Effexor XR—almost doubling spending to \$25.8 million. Eli Lilly's Cymbalta also contributed to the category, continuing as the third most advertised brand, despite a 2% drop in expenditures. Cytostatic Drugs—Other stayed in 2nd place.

TOP 25 ADVERTISED THERAPEUTIC CATEGORIES, 2006

Rank	Rank 2005	Category	\$ ad spending 2006	2005	2004	% change 2006 vs. 2005	2005 vs. 2004
1	1	SSRI/SNRI	44,039	36,307	35,923	21.3	1.1
2	2	Cytostatic Drugs—Other	25,176	23,455	19,546	7.3	20.0
3	4	Antipsychotics—Other	24,787	18,346	19,754	35.1	-7.1
4	30	Diabetes Insulin	21,331	3,804	4,638	460.8	-18.0
5	3	Non-Barbiturates Sedatives—Other	18,495	22,170	10,652	-16.6	108.1
6	50	Vaccines—Other	13,970	2,399	1,043	482.2	130.1
7	11	Ethical Drugs Misc.—Other	13,255	10,552	8,732	25.6	20.8
8	8	Seizure Disorders	12,482	12,617	10,826	-1.1	16.5
9	5	Alzheimer-Type Dementia	12,205	16,794	21,587	-27.3	-22.2
10	6	Cholesterol-Reducing Rx Statins	10,239	14,939	20,171	-31.5	-25.9
11	14	Calcium Blockers	9,627	9,680	19,843	-0.5	-51.2
12	23	Antivirals—Other	8,929	6,678	7,669	33.7	-12.9
13	25	Cancer Therapy Products	7,585	5,404	6,824	40.4	-20.8
14	10	Proton Pump Inhibitors	7,492	11,102	12,464	-32.5	-10.9
15	18	Business & Prof Services/Equipment	7,422	7,612	5,747	-2.5	32.4
16	29	Biological Response Modifier	7,031	3,921	5,449	79.3	-28.0
17	20	Dermatological Other	6,884	6,985	6,523	-1.4	7.1
18	35	Morphine & Opium Non-Injectable	6,641	3,634	3,290	82.7	10.5
19	22	Insulin Sensitizer	6,506	6,750	5,301	-3.6	27.3
20	12	Ext. Spec. Macrolide	6,266	10,509	10,610	-40.4	-1.0
21	53	Biologicals Vaccines	6,085	2,192	424	177.6	417.6
22	24	Orthopedic Supplies—Other	5,713	5,606	4,265	1.9	31.4
23	21	Angiotension II Antag—Alone	5,318	6,883	7,977	-22.7	-13.7
24	51	UT Antispasmodics	5,087	2,217	2,631	129.4	-15.7
25	—	Smoking Deterrent Rx	4,993	0	0	NA	NA

Source: PERQ/HCI Journal Ad Review