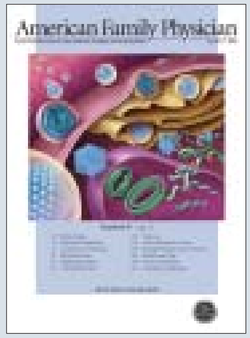
## Top 5 medical/surgical journals ranked by ad dollars, Jan.-June 2004


**1.** Journal of the American Medical Association — ad pages up 7 percent vs. Jan.-June 2003


**2.** New England Journal of Medicine — ad pages up 13 percent vs. Jan.-June 2003




**3.** American Family Physician — ad pages up 13 percent vs. Jan.-June 2003


**4.** Medical Economics — ad pages up 20 percent vs. Jan.-June 2003


**5.** Family Practice News — ad pages up 47 percent vs. Jan.-June 2003

Total ad pages for the top 5 journals up 15 percent vs. Jan-Jun 2003

# REVIVAL OF THE FITTEST

While last year's slight rise in journal ad revenues was cause for optimism, first-half figures for 2004 will surely herald a revival. And it's the larger titles that have gained the most. **Eugene M. May** charts the biggest advertisers and the most heavily advertised products and therapeutic categories.

PERQ/HCI's Journal Ad Review (JAR) indicated that spending in medical/surgical journals during the first half of 2004 registered a gain of 10 percent over the year-ago period. This double-digit increase suggests that the long awaited turnaround for medical/surgical journals is finally beginning to materialize especially compared to previous years: During the first half 2003, ad spending was up only 2 percent, while the two prior first-half year periods were down 4 percent and 13 percent, respectively. The total number of ad pages also showed a favorable trend, up 6 percent during the first six months of 2004 versus a decline of 2 percent the previous year.

**PERQ/HCI MEDICAL/SURGICAL JOURNAL AD REVIEW 2004 MID-YEAR**

At the half-year mark, the top five medical/surgical journals accounted for approximately 15 percent (7,945) of the total number of ad pages reported in JAR (54,667). Of note is that the number of ad pages in the top five journals increased by 15 percent over the prior year-ago period (see top of the page).

The gains reported in both dollars and ad pages can be attributed in large part to an increase in the number of new products/service announcements, as well as higher ad expenditures for major established products such as Lipitor, Sonata, Cozaar, Enbrel and Diovan.

A review of the companies, products and therapeutic classes that make up the top 25 lists follows.

## Leading advertisers

Pfizer, which increased ad spending by 26 percent during the first half 2004, continues as the top advertiser by far with a 14 percent share. Much of Pfizer's increase can be attributed to a 45 percent spending boost for Lipitor, continued strong support for Norvasc and expenditures associated with recently introduced combination therapy, Caduet.

Forest, which markets the two most heavily advertised Rx products, Lexapro and Namenda (a new entry for Alzheimer's disease) remains firmly entrenched in 2nd place with an 8 percent share.

AstraZeneca advanced one spot to 3rd following a 35 percent spending increase, driven largely by the introduction of Crestor. GlaxoSmithKline slipped from 3rd to 4th after reducing ad outlays by 24 percent, while Lilly jumped from 16th to 5th following a 181 percent boost in spending that was driven largely by a series of ads dealing with depression awareness and by Symbyax, a new combination product for bipolar depression. Novartis and Merck each dropped one spot to 6th and 7th, respectively, while Wyeth moved up one position to 8th. Janssen climbed from 28th to 9th following higher ad expenditures for the Risperdal product line. Sanofi-Synthelabo edged up from 11th to 10th while Ortho-McNeil and Abbott Laboratories each dropped four spots to 11th and 12th, respectively, following spending cuts of approximately 21 percent.

Companies new to the top 25 include Lilly Icos, (15th) a joint venture which markets Cialis, Purdue Pharmaceuticals, up from 39th to 16th due largely to the introduction of Spectracef, and Amgen, up from 29th to 17th following a 67 percent boost in ad spending due largely to Aranesp. Bristol-Myers Squibb and Sanofi, which co-promote Plavix, advanced from 26th to 21st; the Wyeth/Amgen partnership that markets Enbrel jumped from 45th to 22nd; Cephalon climbed from 34th to 24th; and Barr Pharmaceuticals leapt from 70th to 25th due to higher ad expenditures in support of Seasonale.


### MOST ADVERTISED COMPANY

Despite a 35 percent hike in spending by its closest contender Forest, Pfizer remains by far the heaviest journal advertiser during the first half of 2004, upping its spending by 26 percent and increasing its share of the market to 14 percent. Much of this increase can be attributed to a 45 percent spending boost for Lipitor, continued strong support for Norvasc and expenditures associated with Caduet, Pfizer's recently introduced combination of these two drugs.

**TOP 25 ADVERTISED COMPANIES JAN-JUN 2004**

| | | Rank | % of ad market (Jan-Jun) | | | % change (Jan-Jun) | |
|---|---|---|---|---|---|---|---|
| **Rank** | **Company** | **2003** | **2004** | **2003** | **2002** | **2004 vs 2003** | **2003 vs 2002** |
| 1 | Pfizer Laboratories | 1 | 14.06 | 12.23 | 11.38 | 26.03 | 11.06 |
| 2 | Forest Pharmaceuticals | 2 | 7.75 | 6.29 | 3.10 | 34.99 | 109.97 |
| 3 | AstraZeneca | 4 | 4.80 | 3.91 | 3.25 | 34.55 | 24.36 |
| 4 | GlaxoSmithKline | 3 | 3.71 | 5.38 | 6.18 | -24.46 | -9.89 |
| 5 | Eli Lilly & Company | 16 | 3.28 | 1.28 | 0.85 | 180.88 | 55.82 |
| 6 | Novartis | 5 | 3.09 | 3.24 | 3.33 | 4.68 | 0.61 |
| 7 | Merck | 6 | 2.66 | 3.21 | 2.04 | -9.22 | 62.56 |
| 8 | Wyeth Pharmaceuticals | 9 | 2.32 | 2.15 | 6.66 | 17.82 | -66.57 |
| 9 | Janssen Pharmaceutica | 28 | 2.10 | 0.80 | 0.99 | 187.65 | -16.11 |
| 10 | Sanofi-Synthelabo | 11 | 1.77 | 1.77 | 0.71 | 9.84 | 155.91 |
| 11 | Ortho-McNeil | 7 | 1.69 | 2.35 | 3.12 | -21.37 | -22.18 |
| 12 | Abbott Laboratories | 8 | 1.65 | 2.31 | 2.04 | -21.63 | 16.91 |
| 13 | Merck/Schering-Plough | 12 | 1.37 | 1.50 | — | 0.39 | — |
| 14 | TAP Pharmaceutical | 15 | 1.28 | 1.34 | 1.29 | 4.77 | 6.85 |
| 15 | Lilly Icos | 1100 | 1.24 | — | 0.02 | 47150.14 | -85.66 |
| 16 | Purdue Pharma | 39 | 1.22 | 0.49 | 0.59 | 174.46 | -14.25 |
| 17 | Amgen | 29 | 1.16 | 0.76 | 1.11 | 66.60 | -29.44 |
| 18 | King Pharmaceuticals | 24 | 1.12 | 0.86 | 0.44 | 43.68 | 99.56 |
| 19 | Roche Laboratories | 13 | 1.06 | 1.48 | 1.16 | -21.61 | 31.69 |
| 20 | Braintree Laboratories | 21 | 0.91 | 0.97 | 1.10 | 2.34 | -8.64 |
| 21 | Bristol-Myers Squibb/Sanofi | 26 | 0.88 | 0.84 | 0.58 | 15.00 | 50.20 |
| 22 | Wyeth and Amgen | 45 | 0.88 | 0.43 | 0.30 | 123.80 | 48.87 |
| 23 | Takeda and Lilly | 22 | 0.81 | 0.96 | 1.13 | -7.61 | -11.84 |
| 24 | Cephalon | 34 | 0.81 | 0.59 | 0.45 | 48.86 | 35.79 |
| 25 | Barr Pharmaceuticals | 70 | 0.74 | 0.18 | 0.17 | 341.57 | 13.81 |

Source: PERQ/HCI Journal Ad Review

## Most heavily advertised products

For the second year in a row, Forest's Lexapro was the most heavily advertised product (just under 4 percent of all medical/surgical ad dollars) even as spending was down 32 percent from the first half 2003. Forest's new drug for Alzheimer's disease, Namenda, took the number two spot with nine-page ads dominating its media schedule.

AstraZeneca's new cholesterol reducer, Crestor, was 3rd while Pfizer's Norvasc slipped from 2nd to 4th following a 5 percent spending cut. Another Pfizer entry, Lipitor advanced from 13th to 5th as ad outlays increased by 45 percent.

Merck/Schering-Plough's Zetia slipped from 4th to 6th as ad budgets were cut by 5 percent, while Lilly Icos' Cialis placed 7th. After just three months on the market, Caduet became the 8th most heavily advertised product. Eight-page ads currently account for much of the journal budget associated with this new Pfizer combination agent. Ambien is now 9th (down from 6th) after a marginal 3 percent reduction in ad outlays. For approximately one year, Lilly has been running a series of ads to increase awareness for depression as the company awaited the approval of Cymbalta. Expenditures for this program during the first half 2004 ranked 10th.


### MOST ADVERTISED BRAND

For the second year in a row, Forest's Lexapro finished the first six months of the year as the most heavily advertised product with a share of just under 4 percent of all medical/surgical ad dollars — and this despite ad spending being down 32 percent from the first half 2003. Forest also claimed second spot with a show of largely nine-page ads for new Alzheimer's therapy, Namenda.

Also new to the list is Risperdal product family advertising, up from 103rd to 13th. Neurontin, which was previously included in a series of family ads, ranked 15th. Other new services/products include a Pfizer cholesterol education/awareness program (19th) (identified as Lipitor — non-branded) and Purdue's new cephalo-

**TOP 25 ADVERTISED BRANDS JAN-JUN 2004**

| | | | Rank | % of ad market (Jan-Jun) | | | % change (Jan-Jun) | |
|---|---|---|---|---|---|---|---|---|
| Rank | Product | Company | 2003 | 2004 | 2003 | 2002 | 2004 vs 2003 | 2003 vs 2002 |
| 1 | Lexapro | Forest Pharmaceuticals | 1 | 3.86 | 6.22 | 1.00 | -32.03 | 545.97 |
| 2 | Namenda | Forest Pharmaceuticals | — | 3.77 | — | — | — | — |
| 3 | Crestor | AstraZeneca | — | 1.78 | — | — | — | — |
| 4 | Norvasc | Pfizer Laboratories | 2 | 1.64 | 1.89 | 2.37 | -4.90 | -17.39 |
| 5 | Lipitor tablets | Pfizer Laboratories | 13 | 1.54 | 1.16 | 0.73 | 45.18 | 64.15 |
| 6 | Zetia tablets | Merck/Schering-Plough | 4 | 1.29 | 1.50 | — | -5.27 | — |
| 7 | Cialis tablets | Lilly Icos | 1889 | 1.24 | — | — | 47150.14 | — |
| 8 | Caduet | Pfizer Laboratories | — | 1.19 | — | — | — | — |
| 9 | Ambien tablets | Sanofi-Synthelabo | 6 | 1.18 | 1.33 | 0.65 | -3.19 | 110.78 |
| 10 | Cymbalta/depression awareness | Eli Lilly & Company | 96 | 1.02 | 0.22 | — | 410.69 | — |
| 11 | Effexor XR capsules | Wyeth Pharmaceuticals | 17 | 0.92 | 1.00 | 2.91 | 0.81 | -64.52 |
| 12 | Nexium | AstraZeneca | 5 | 0.91 | 1.36 | 0.86 | -26.44 | 63.26 |
| 13 | Risperdal tablets and oral solution | Janssen Pharmaceutica | 103 | 0.89 | 0.19 | 0.36 | 411.16 | -45.63 |
| 14 | Plavix tablets | Bristol-Myers Squibb/Sanofi | 23 | 0.88 | 0.84 | 0.58 | 14.82 | 50.20 |
| 15 | Neurontin capsules/tablets | Pfizer Laboratories | — | 0.87 | — | — | — | — |
| 16 | Sonata capsules | King Pharmaceuticals | 40 | 0.86 | 0.51 | 0.15 | 86.11 | 250.79 |
| 17 | Cozaar tablets for hypertension | Merck | 55 | 0.86 | 0.41 | — | 130.72 | — |
| 18 | Enbrel | Wyeth Pharmaceuticals and Amgen | 58 | 0.86 | 0.39 | 0.28 | 143.04 | 40.84 |
| 19 | Lipitor — nonbranded ad | Pfizer Laboratories | — | 0.85 | — | — | — | — |
| 20 | Spectracef tablets | Purdue Pharma | — | 0.84 | — | — | — | — |
| 21 | Actos oral insulin | Takeda and Lilly | 18 | 0.81 | 0.96 | 1.13 | -7.61 | -11.84 |
| 22 | Geodon oral capsules and injection | Pfizer Laboratories | 208 | 0.80 | 0.08 | — | 1021.89 | — |
| 23 | Miralax powder | Braintree Laboratories | 27 | 0.75 | 0.80 | 0.90 | 2.57 | -8.36 |
| 24 | Diovan capsules/tablets | Novartis | 38 | 0.75 | 0.55 | 0.36 | 48.02 | 58.43 |
| 25 | Celebrex capsules | Pfizer Laboratories | 31 | 0.72 | 0.70 | 0.63 | 12.93 | 15.16 |

Source: PERQ/HCI Journal Ad Review

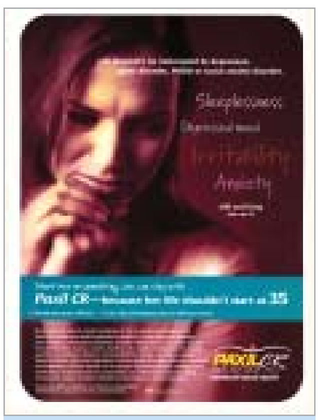
sporin, Spectracef (20th). Previously advertised products that moved into the top 25 include Sonata, up from 40th to 16th, Cozaar up from 55th to 17th, and Enbrel, which advanced from 58th to 18th. Pfizer's Geodon product line jumped from 208th to 22nd, Miralax edged up from 27th to 23rd and a 48 percent boost in spending moved Novartis' Diovan from 38th to 24th. Completing the top 25 was another Pfizer brand, Celebrex, up from 31st place last year.

### The top drug classes

Once again, SSRI/SNRIs was the most heavily advertised category, even though ad expenditures were down 14 percent. This can be traced to spending cuts on Lexapro and Paxil CR. Cholesterol Reducers Rx Statins climbed from 16th to 2nd following a 248 percent in ad expenditures driven primarily by Crestor and Lipitor. The Alzheimer-Type Dementia class jumped from 25th to 3rd following the introduction of Namenda, Antipsychotics-Other continued in 4th place as ad spending advanced by 34 percent. Cytostatic Drugs — Other slipped from 2nd to 5th even as spending rose by 6 percent.

Calcium Blockers climbed from 10th to 6th as ad outlays increased by 69 percent due to the addition of Pfizer's Caduet. Spending cuts on Aciphex, Nexium, Prevacid and Protonix resulted in a drop from 3rd to 7th for Proton Pump Inhibitors, and the Seizure Disorder class slipped from 6th to 8th, even though ad outlays increased by 13 percent. The introduction of Cialis advanced the Sexual Function Disorders category from 35th to 9th, while Angiotensin II Teceptor Blockers, Alone slipped from 7th to 10th. Extended Spectrum Macrolides climbed from 22nd to 13th on a 70 percent increase in ad outlays due mostly to Pfizer's Zyvox.

The Interferon category, new to the top 25, climbed from 26th to 15th following a 52 percent increase in ad expenditures due largely to Peg-Intron and Betaseron. Others new to this year's list include Cancer Therapy Products, up from 46th to 20th, Oral Contraceptives, Estrogen with Progestogens, up from 43rd to 22nd due mostly to Barr's Seasonale, and Antivirals, Other which climbed from 64th to 23rd due in large part to Reyataz, Valcyte and Valtrex. Also advancing were Quinolones, Systemic, from 42nd to 24th due largely to Ciprodex, Levaquin and Leva-Pak, and Cephalosporins and Related, 57th to 25th due mainly to Purdue's Spectracef. ■



### MOST ADVERTISED DRUG CLASS

Once again, SSRI/SNRIs emerged as the most advertised therapeutic category for the first six months of the year, accounting for close to 7 percent of the ad market. Despite this, expenditures were down by 14 percent, attributable to spending cuts for Forest's Lexapro (down 32 percent, but still the heaviest advertised product) and GlaxoSmithKline's Paxil CR (down 24 percent). Unsurprisingly, statins are hot on the heels in 2nd place.

**TOP 25 ADVERTISED THERAPEUTIC CATEGORIES JAN-JUN 2004**

| Rank | Category | Rank 2003 | Rank 2004 | % of ad market (Jan-June) 2003 | 2002 | % change 2004 vs 2003 | % change (Jan-Jun) 2003 vs 2002 |
|---|---|---|---|---|---|---|---|
| 1 | SSRI/SNRI | 1 | 6.82 | 8.71 | 6.78 | -14.28 | 32.84 |
| 2 | Cholesterol Reducers Rx Statins | 16 | 4.92 | 1.55 | 3.45 | 248.30 | -53.56 |
| 3 | Alzheimer-Type Dementia | 25 | 4.32 | 1.05 | 0.71 | 350.05 | 53.67 |
| 4 | Antipsychotics — Other | 4 | 4.02 | 3.29 | 2.04 | 33.97 | 66.26 |
| 5 | Cytostatic Drugs — Other | 2 | 3.67 | 3.80 | 3.51 | 5.68 | 12.02 |
| 6 | Calcium Blockers | 10 | 3.11 | 2.01 | 2.37 | 69.18 | -12.15 |
| 7 | Proton Pump Inhibitors | 3 | 2.82 | 3.72 | 5.21 | -16.88 | -26.21 |
| 8 | Seizure Disorders | 6 | 2.63 | 2.55 | 1.53 | 13.02 | 72.02 |
| 9 | Sexual Function Disorders | 35 | 2.21 | 0.72 | 0.57 | 238.03 | 30.01 |
| 10 | Angiotension II Antag, Alone | 7 | 2.20 | 2.46 | 1.48 | -2.25 | 72.22 |
| 11 | COX-2 Inhibitors | 5 | 2.15 | 2.86 | 2.37 | -17.57 | 24.57 |
| 12 | Non-Barb Sed Others | 11 | 2.12 | 1.84 | 0.81 | 25.95 | 136.10 |
| 13 | Ext. Spec. Macrolide | 22 | 1.74 | 1.12 | 1.51 | 70.27 | -23.45 |
| 14 | Ethical Drugs Misc. | 8 | 1.68 | 2.43 | 2.41 | -24.22 | 4.30 |
| 15 | Interferon | 26 | 1.45 | 1.05 | 0.62 | 51.92 | 74.98 |
| 16 | Biologocal Response Modifier | 18 | 1.39 | 1.42 | 0.58 | 7.13 | 151.76 |
| 17 | Insulin Sensitizer | 13 | 1.39 | 1.77 | 2.80 | -13.64 | -34.81 |
| 18 | Cholesterol Reducers Rx Others | 17 | 1.37 | 1.50 | 0.03 | 0.39 | 5713.49 |
| 19 | Anti-Migraine | 14 | 1.37 | 1.74 | 0.71 | -13.81 | 152.91 |
| 20 | Cancer Therapy Products | 46 | 1.33 | 0.58 | 0.82 | 152.80 | -27.19 |
| 21 | Dermatological Other | 12 | 1.28 | 1.79 | 2.02 | -21.48 | -8.45 |
| 22 | Oral Contraceptives, Est. w/Prog. | 43 | 1.23 | 0.60 | 1.57 | 122.96 | -60.22 |
| 23 | Antivirals, Other | 64 | 1.22 | 0.40 | 0.46 | 236.52 | -9.86 |
| 24 | Quinolones, Systemic | 42 | 1.19 | 0.64 | 1.32 | 102.35 | -49.58 |
| 25 | Cephalosporins & Related | 57 | 1.15 | 0.48 | 0.45 | 159.12 | 10.55 |

Source: PERQ/HCI Journal Ad Review