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Reprint

Top Companies, Classes, and Products in the DTC Space

by John Mack, VirSci Corporation.

The following is a highlight from the Pharmaceutical Marketing Global Summit hosted by the Strategic Research Institute (www.srinstitute.com) and held in Philadelphia, PA on January 12-14, 2003.

Top Companies, Classes, and Products in the DTC Space Presented by Keith Mandia, Senior Product Manager, Verispan (formerly Scott-Levin)

This presentation provided an overview of DTC spending YTD 2002 compared with YTD 2001. The sources the data are Verispan's Source Prescription Audit and other market research.

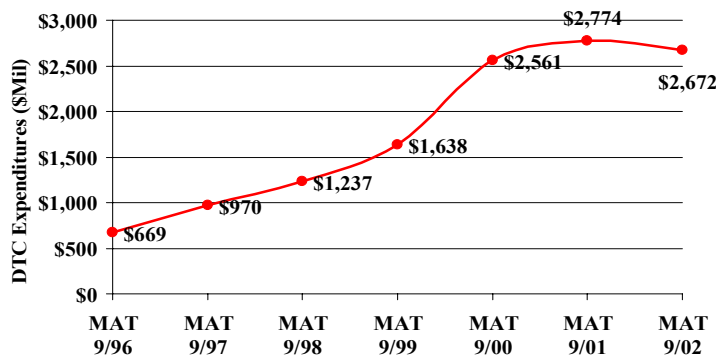
Retail Rx Sales Up 10% for the Entire Industry (YTD through 11/02)

Company (Top 5 only)	Rx Sales 2002 (\$ Bil)
Pfizer	16
GSK	14
Merck	9
Astra Zeneca	8
Johnson & Johnson	7

Novartis, J&J, and AZ sales were up 19%, 14%, and 13%, respectively for the year, while BMS was down 18%.

For the First Time in Several Years, DTC Expenditures Represent Less of the Promotional Mix Than in the Previous Year

DTC Spending Levelled Off in 2001 and 2002 (source: Competitive Media Reporting and Verispan).

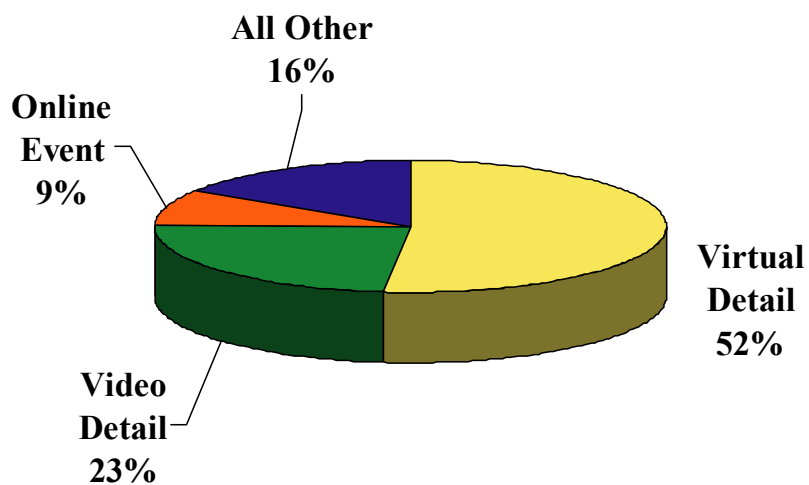


Shift in Resources from DTC to Detailing?

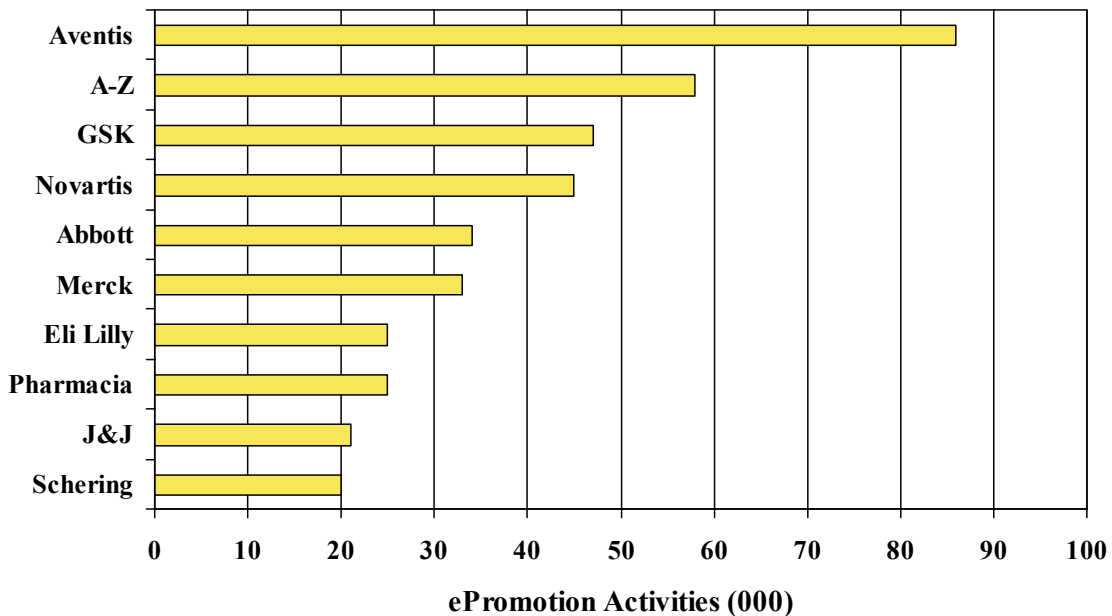
Promotional Activity	2001 (Base: \$12.4 Bil) % of Expenditure	YTD 9/02 (Base: \$9.0 Bil) % of Expenditure
Office Detail	48	51
DTC	25	23
Events	18	18
Other	9	8

ePromotion

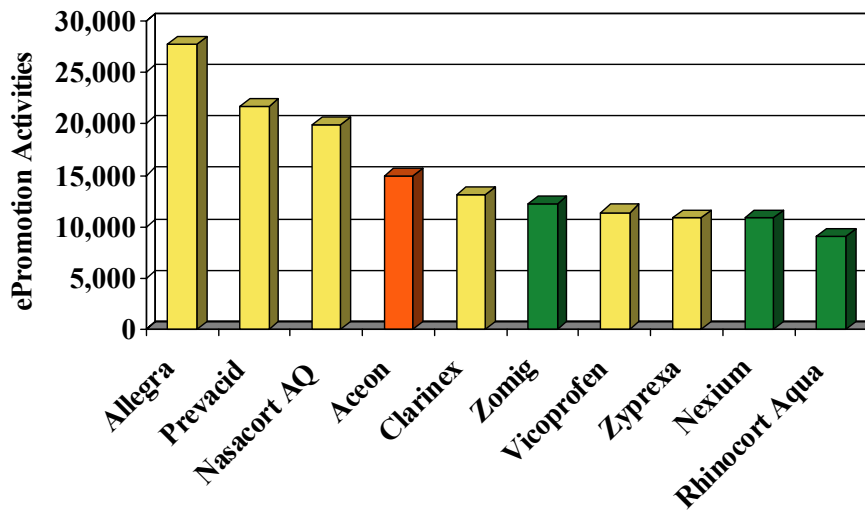
Promoting to physicians via the Internet (ePromotion) is, according to Mandia, “a unique new area that many of the top pharmaceutical companies are becoming more active in.” Citing data in Verispan’s ePromotion Audit, over half of this activity took place in the form of virtual details (see chart; data for 3Q02; base: 555,000 activities).



Aventis led all pharma corporations in ePromotion activities during 3Q02. The ePromo top ten (next chart) is much different than details and events (offline), in which Pfizer, GSK, and Merck represented the top 3, respectively.



Three of the top 10 promoted brands were AstraZeneca products.



In terms of dollars, \$54 million were spent by the industry on ePromotions in the 3rd quarter of 2002. This represents less than 2% of the \$3.3 billion spent on all promotional activity during that period.

For more information, please contact Verispan at 1-800-982-5613 or visit the website at www.verispan.com.

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For inquiries regarding article submissions, ads, or conference listings, contact:

John Mack

VirSci Corporation

www.virsci.com

PO Box 760

Newtown, PA 18940

215-504-4164, 215-504-5739 FAX

<mailto:johnmack@virsci.com>